

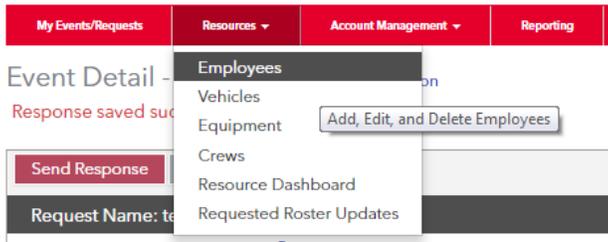
Part 2 - Resource Assist - Adding Resources Guide

Contents

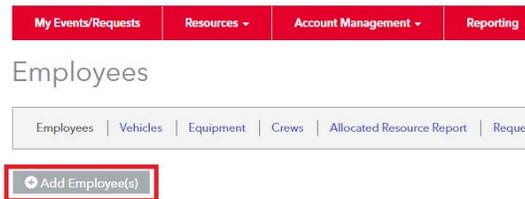
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Adding Employees

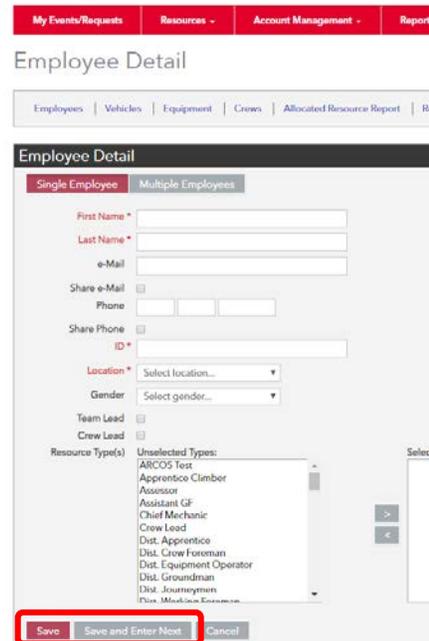
1. Click Resources from the top red bar.
2. Click Employees from the drop-down menu.



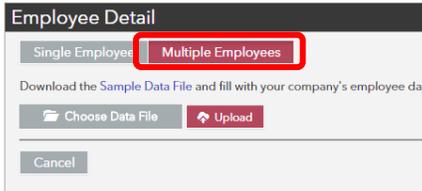
3. Click the 'Add Employees' button.



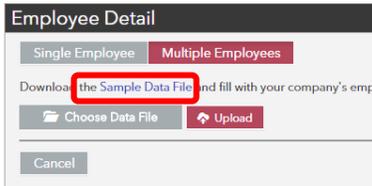
4. The Single Employee entry appears by default.
 - a. The red font fields are required.
 - b. Click 'Save' to advance to the Employee record. Click 'Save and Enter Next' to add new Employee.



- To add multiple employees at once, Click on the 'Multiple Employees' button.



- Click the Sample Data file link in blue font to download the file template.



- Enter the requested information into the "Sample Data File". Red fields are required:

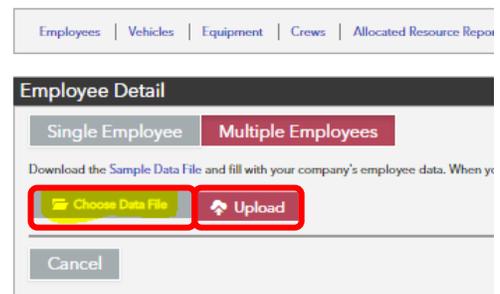
First Name	Last Name	e-Mail	Share e-Mail	Phone	Share Phone	ID	Location	Gender	Team Lead	Crew Lead	Resource Types	Resource Types 2	Resource Types 3
------------	-----------	--------	--------------	-------	-------------	----	----------	--------	-----------	-----------	----------------	------------------	------------------

First Name	First Name
Last Name	Last Name
e-Mail	Optional employee email
Share e-Mail	"Yes" or "No" values to indicate sharing employee email
Phone	Optional employee phone
Share Phone	"Yes" or "No" values to indicate sharing employee phone
ID	This is an internal to the contractor employee ID value and needs to be unique per employee
Location	This needs to be a "Location" value in the contractor portal that you want the resource associated with
Gender	Employee gender
Team Lead	"Yes" or "No" values to indicate if the employee is a Team Lead
Crew Lead	"Yes" or "No" values to indicate if the employee is a Crew Lead
Resource Types	This field is used to add associate an employee's "job classification" to an employee Example "Assessor" Note – Multiple "Resource Type" can be added by using a new column for each value

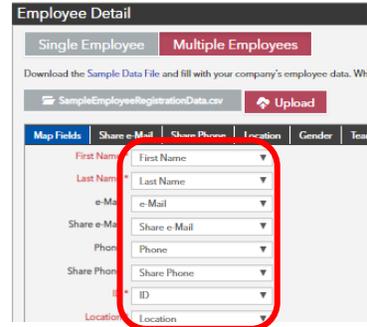
Note: Each employee can only be loaded once. Any additional fields or changes will be done manually for each employee record.

- Save the file as comma delimited (.csv)
- Click the 'Choose Data File' and browse to the location of your saved file, then click 'Upload'.

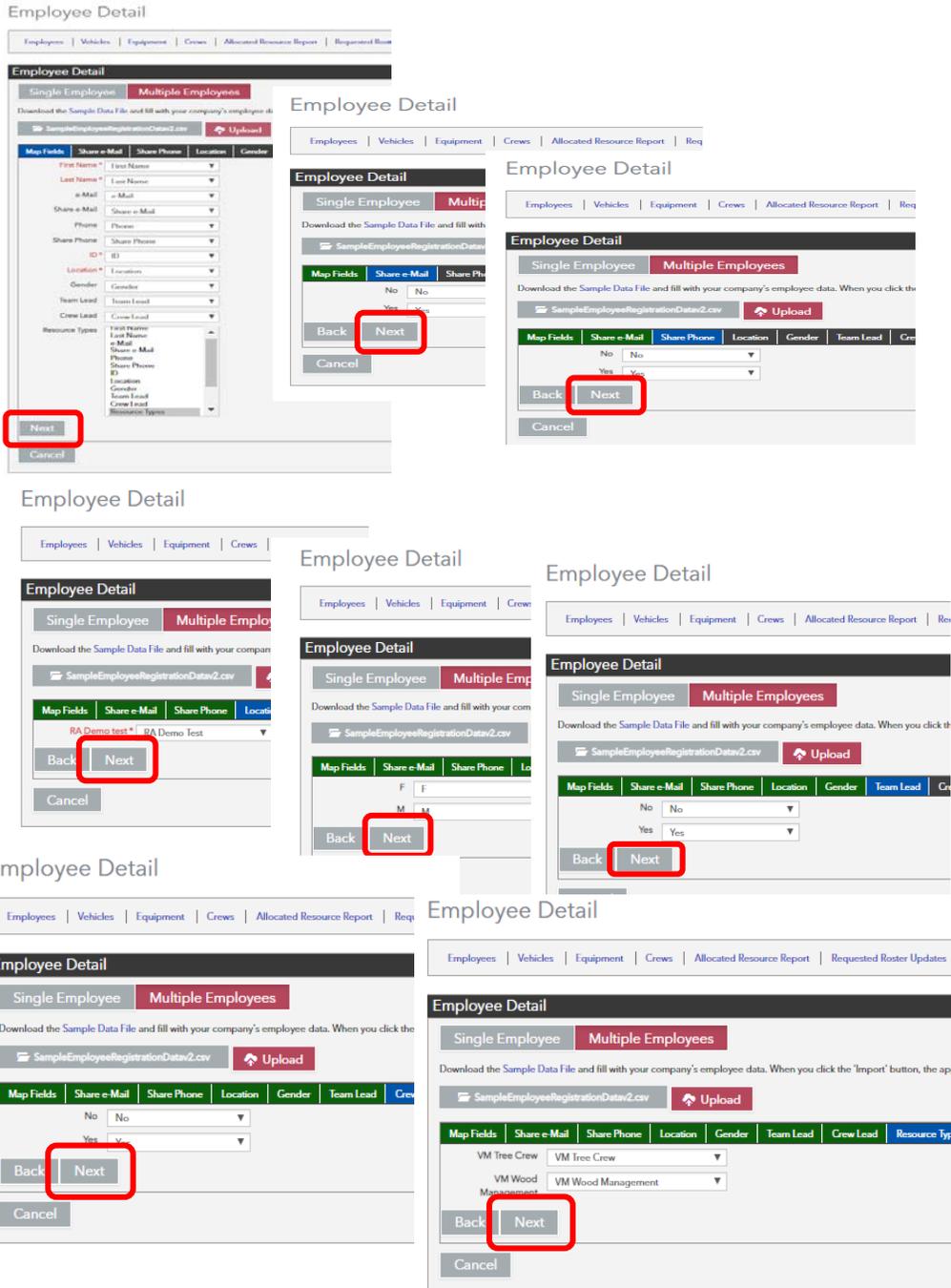
Employee Detail



10. Verify the labeled fields match or are properly selected to identify the data file column names in each drop-down menu.



11. Click the 'Next' button to proceed through the load process.



12. Review the displayed data before it is imported.
13. Click the 'Import' button.

Employee Detail

Employees | Vehicles | Equipment | Crews | Allocated Resource Report | Requested Roster Updates

Employee Detail

Single Employee Multiple Employees

Download the Sample Data File and fill with your company's employee data. When you click the 'Import' button, the application will import your data and begin tracking availability.

SampleEmployeeRegistrationData2.csv Upload

Map Fields	Share e-Mail	Share Phone	Location	Gender	Team Lead	Crew Lead	Resource Types	Import Data	Results		
1 - 20 of 23 >											
First Name	Last Name	e-Mail	Share e-Mail	Phone	Share Phone	ID	Location	Gender	Team Lead	Crew Lead	Resource Types
Test	Employee44		Yes	1111111111	Yes	70303432	RA Demo Test	M	Yes	Yes	VM Tree Crew, VM Wood Management
Test	Employee45		No	1111111130	No	147885560	RA Demo Test	F	No	No	VM Tree Crew, VM Wood Management

Back Import Cancel

14. The final 'Results' page below shows the success or failure of loaded records. Note: Failed records must be reviewed in the .csv file and edited and reloaded.

Employee Detail

Employees | Vehicles | Equipment | Crews | Allocated Resource Report | Requested Roster Updates

Employee Detail

Single Employee Multiple Employees

Download the Sample Data File and fill with your company's employee data. When you click the 'Import' button, the application will import your data and begin tracking availability.

SampleEmployeeRegistrationData2.csv Upload

Map Fields	Share e-Mail	Share Phone	Location	Gender	Team Lead	Crew Lead	Resource Types	Import Data	Results			
1 - 20 of 23 >												
First Name	Last Name	e-Mail	Share e-Mail	Phone	Share Phone	ID	Location	Gender	Team Lead	Crew Lead	Resource Types	Result
Test	Employee44		Yes	1111111111	Yes	70303432	RA Demo Test	M	Yes	Yes	VM Tree Crew, VM Wood Management	Success
Test	Employee45		No	1111111112	No	74123544	RA Demo Test	F	No	No	VM Tree Crew, VM Wood Management	Success
Test	Employee46		No	1111111113	No	77943656	RA Demo Test	M	No	No	VM Tree Crew, VM Wood Management	Success
Test	Employee47		No	1111111114	No	81763768	RA Demo Test	F	No	No	VM Tree Crew, VM Wood Management	Success
Test	Employee48		Yes	1111111115	Yes	8583880	RA Demo Test	M	Yes	Yes	VM Tree Crew, VM Wood Management	Success
Test	Employee49		No	1111111116	No	89403992	RA Demo Test	F	No	No	VM Tree Crew, VM Wood Management	Success
Test	Employee50		No	1111111117	No	93224104	RA Demo Test	M	No	No	VM Tree Crew, VM Wood Management	Success
Test	Employee51		No	1111111118	No	97044216	RA Demo Test	F	No	No	VM Tree Crew, VM Wood Management	Success
Test	Employee52		Yes	1111111119	Yes	10084328	RA Demo Test	M	Yes	Yes	VM Tree Crew, VM Wood Management	Success
Test	Employee53		No	1111111120	No	10468440	RA Demo Test	F	No	No	VM Tree Crew, VM Wood Management	Success
Test	Employee54		No	1111111121	No	10850652	RA Demo Test	M	No	No	VM Tree Crew, VM Wood Management	Success
Test	Employee55		No	1111111122	No	11232464	RA Demo Test	F	No	No	VM Tree Crew, VM Wood Management	Success
Test	Employee56		Yes	1111111123	Yes	11614476	RA Demo Test	M	Yes	Yes	VM Tree Crew, VM Wood Management	Success
Test	Employee57		No	1111111124	No	11996488	RA Demo Test	F	No	No	VM Tree Crew, VM Wood Management	Success
Test	Employee58		No	1111111125	No	12378500	RA Demo Test	M	No	No	VM Tree Crew, VM Wood Management	Success
Test	Employee59		No	1111111126	No	12760512	RA Demo Test	F	No	No	VM Tree Crew, VM Wood Management	Success
Test	Employee60		Yes	1111111127	Yes	13142524	RA Demo Test	M	Yes	Yes	VM Tree Crew, VM Wood Management	Success
Test	Employee61		No	1111111128	No	135245336	RA Demo Test	F	No	No	VM Tree Crew, VM Wood Management	Success
Test	Employee62		No	1111111129	No	139065448	RA Demo Test	M	No	No	VM Tree Crew, VM Wood Management	Success
Test	Employee63		No	1111111130	No	147885560	RA Demo Test	F	No	No	VM Tree Crew, VM Wood Management	Success

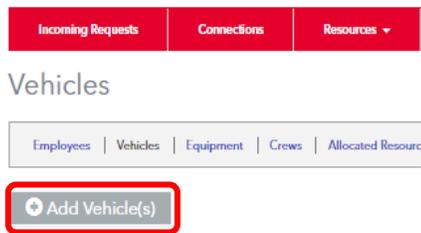
Cancel

Adding Vehicles

1. Click Resources from the top red bar.
2. Click Vehicles from the drop-down menu.

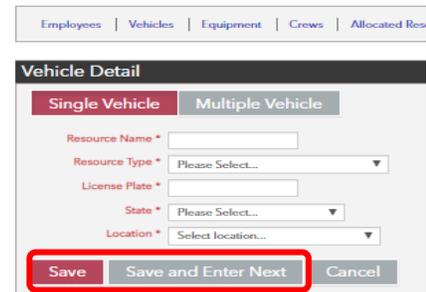


3. Click the 'Add Vehicle(s)' button.

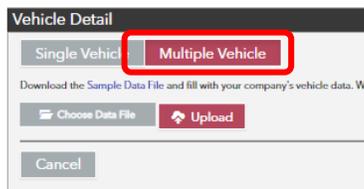


4. The Single Vehicle entry appears by default.
 - a. The red font fields are required.
 - b. Click 'Save' to advance to the Vehicle record. Click 'Save and Enter Next' to add new vehicle.

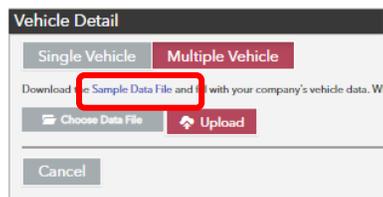
Vehicle Detail

A screenshot of the 'Vehicle Detail' form. At the top, there is a breadcrumb trail: 'Employees | Vehicles | Equipment | Crews | Allocated Resources'. Below the breadcrumb, there are two tabs: 'Single Vehicle' and 'Multiple Vehicle'. The 'Single Vehicle' tab is selected. The form contains several fields: 'Resource Name' (text input), 'Resource Type' (dropdown menu), 'License Plate' (text input), 'State' (dropdown menu), and 'Location' (dropdown menu). The 'Resource Name', 'License Plate', 'State', and 'Location' fields are marked with an asterisk, indicating they are required. At the bottom of the form, there are three buttons: 'Save', 'Save and Enter Next', and 'Cancel'. The 'Save' and 'Save and Enter Next' buttons are highlighted with a red rectangular box.

5. To add Multiple Vehicles at once, Click on the 'Multiple Vehicle' button.

A screenshot of the 'Vehicle Detail' form. The 'Multiple Vehicle' tab is selected and highlighted with a red rectangular box. Below the tabs, there is a text prompt: 'Download the Sample Data File and fill with your company's vehicle data. WI'. There are two buttons: 'Choose Data File' and 'Upload'. At the bottom, there is a 'Cancel' button.

6. Click the Sample Data file link in blue font to download the file template.

A screenshot of the 'Vehicle Detail' form. The 'Multiple Vehicle' tab is selected. Below the tabs, there is a text prompt: 'Download the Sample Data File and fill with your company's vehicle data. WI'. The text 'Sample Data File' is highlighted with a red rectangular box. There are two buttons: 'Choose Data File' and 'Upload'. At the bottom, there is a 'Cancel' button.

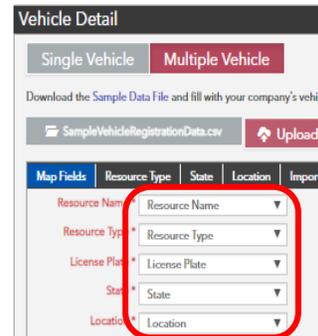
- Enter the requested information into the "Sample Data File". Red fields are required:

Resource Name	Resource Type	License Plate	State	Location
---------------	---------------	---------------	-------	----------

Resource Name	Vehicle Name
Resource Types	This field is used to add associate a vehicle to a "Resource Type" Example "Bucket Truck"
License Plate	The vehicles license plate
State	Two letter state abbreviation
Location	This needs to be a "Location" value in the contractor portal that you want the resource associated with

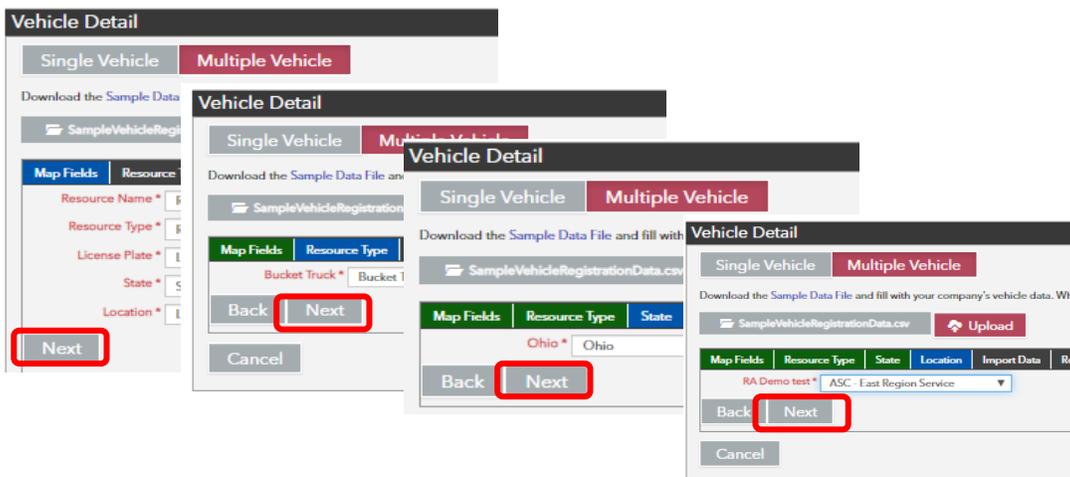
Note: Each vehicle can only be loaded once. Any additional fields or changes will be done manually for each record.

- Save the file as comma delimited (.csv)
- Click the 'Choose Data File' and browse to the location of your saved file, then click 'Upload'.

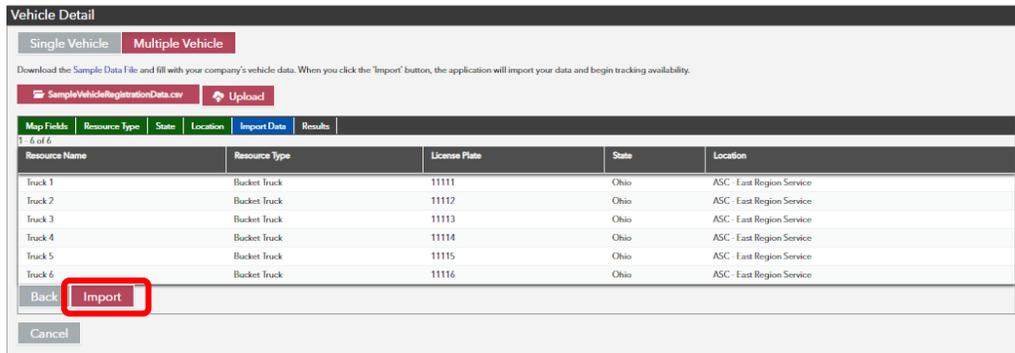


- Verify the labeled fields match or are properly selected to identify the loaded file column names in each drop-down menu.

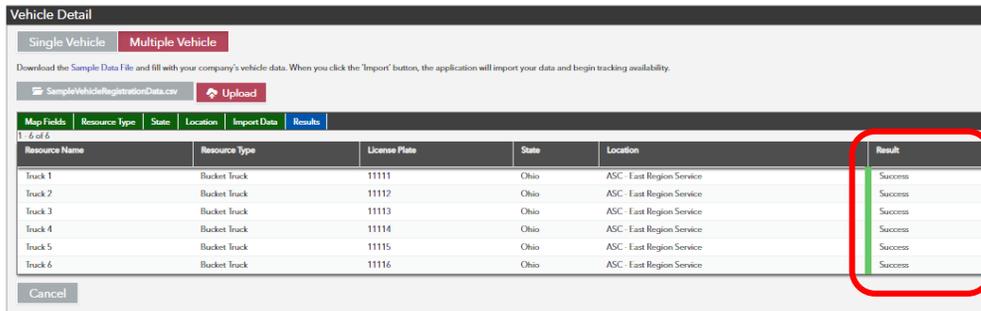
- Click the 'Next' button to proceed through the load process.



12. Review the displayed data before it is imported.
13. Click the 'Import' button.

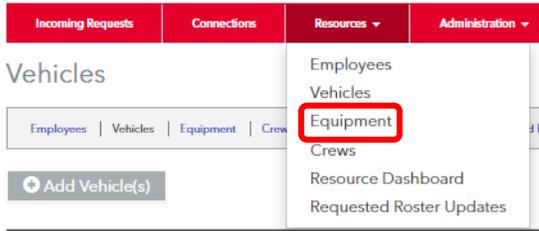


14. The final 'Results' page below shows the success or failure of loaded records. Note: Failed records must be reviewed in the .csv file and edited and reloaded.

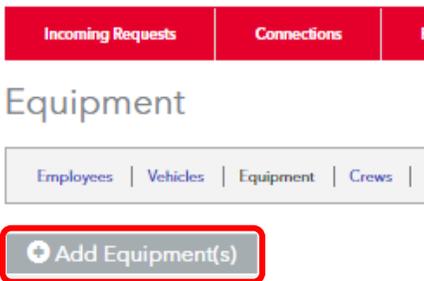


Adding Equipment

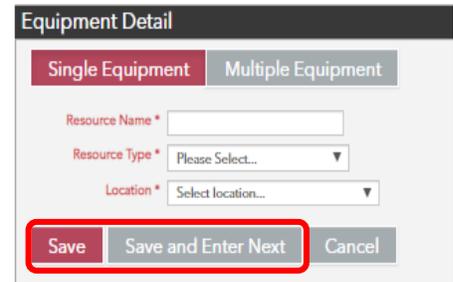
1. Click Resources from the red bar.
2. Click Vehicles from the drop-down menu.



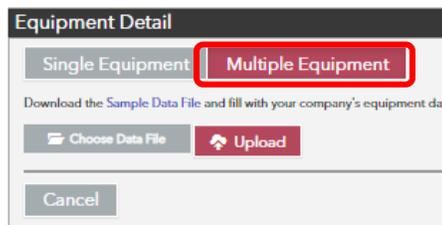
3. Click the 'Add Equipment(s)' button.



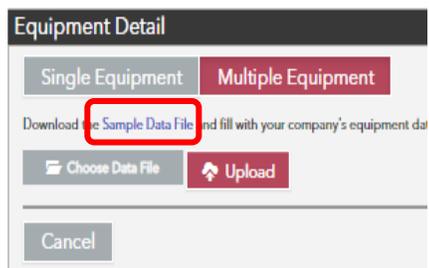
12. The Single Equipment entry appears by default.
 - a. The red font fields are required.
 - b. Click 'Save' to advance to the Equipment record. Click 'Save and Enter Next' to add new Equipment.

A screenshot of the 'Equipment Detail' form. At the top, there are two tabs: 'Single Equipment' (selected) and 'Multiple Equipment'. Below the tabs, there are three input fields: 'Resource Name *' (text input), 'Resource Type *' (dropdown menu with 'Please Select...' selected), and 'Location *' (dropdown menu with 'Select location...' selected). At the bottom of the form, there are three buttons: 'Save', 'Save and Enter Next', and 'Cancel'. The 'Save' and 'Save and Enter Next' buttons are highlighted with a red rectangular box.

4. To add Multiple Equipment at once, Click on the 'Multiple Equipment' button.

A screenshot of the 'Equipment Detail' form. At the top, there are two tabs: 'Single Equipment' and 'Multiple Equipment' (selected). Below the tabs, there is a text prompt: 'Download the Sample Data File and fill with your company's equipment data'. Below this prompt, there are two buttons: 'Choose Data File' and 'Upload'. At the bottom of the form, there is a 'Cancel' button. The 'Multiple Equipment' tab is highlighted with a red rectangular box.

5. Click the Sample Data file link in blue font to download the file template.

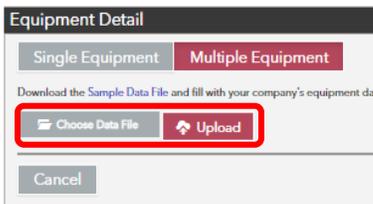
A screenshot of the 'Equipment Detail' form. At the top, there are two tabs: 'Single Equipment' and 'Multiple Equipment' (selected). Below the tabs, there is a text prompt: 'Download the Sample Data File and fill with your company's equipment data'. The 'Sample Data File' link is highlighted with a red rectangular box. Below this prompt, there are two buttons: 'Choose Data File' and 'Upload'. At the bottom of the form, there is a 'Cancel' button.

- Enter the requested information into the "Sample Data File". Red fields are required:

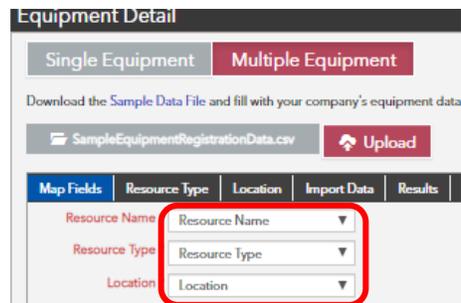
Resource Name	Resource Type	Location
Resource Name	Name = Equipment Name	
Resource Types	Types = This field is used to add associate a piece of equipment to a "Resource Type" Example "Digger"	
Location	This needs to be a "Location" value in the contractor portal that you want the resource associated with	

Note: Each equipment can only be loaded once. Any additional fields or changes will be done manually for each record.

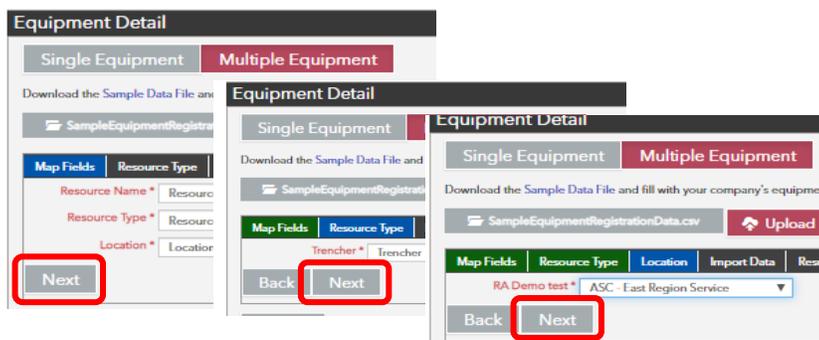
- Save the file as comma delimited (.csv)
- Click the 'Choose Data File' and browse to the location of your saved file, then click 'Upload'.



- Verify the labeled fields match or are properly selected to identify the loaded file column names in each drop-down menu.



- Click the 'Next' button to proceed through the load process.



13. Review the displayed data before it is imported.
14. Click the 'Import' button.

Equipment Detail

Single Equipment **Multiple Equipment**

Download the [Sample Data File](#) and fill with your company's equipment data. When you click the 'Import' button, the application will import your data and begin tracking availability.

SampleEquipmentRegistrationData.csv **Upload**

Map Fields Resource Type Location **Import Data** Results

1 - 10 of 10

Resource Name	Resource Type	Location
Trencher 1	Trencher	ASC - East Region Service
Trencher 2	Trencher	ASC - East Region Service
Trencher 3	Trencher	ASC - East Region Service
Trencher 4	Trencher	ASC - East Region Service
Trencher 5	Trencher	ASC - East Region Service
Trencher 6	Trencher	ASC - East Region Service
Trencher 7	Trencher	ASC - East Region Service
Trencher 8	Trencher	ASC - East Region Service
Trencher 9	Trencher	ASC - East Region Service
Trencher 10	Trencher	ASC - East Region Service

Back **Import**

15. The final 'Results' page below shows the success or failure of loaded records. Note: Failed records must be reviewed in the .csv file and edited and reloaded.

Equipment Detail

Single Equipment **Multiple Equipment**

Download the [Sample Data File](#) and fill with your company's equipment data. When you click the 'Import' button, the application will import your data and begin tracking availability.

SampleEquipmentRegistrationData.csv **Upload**

Map Fields Resource Type Location **Import Data** **Results**

1 - 10 of 10

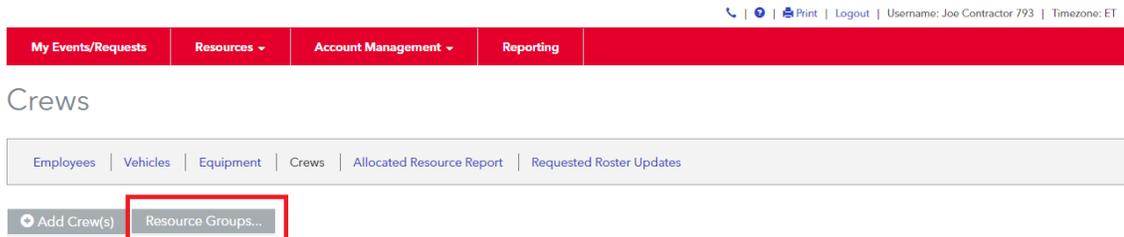
Resource Name	Resource Type	Location	Result
Trencher 1	Trencher	ASC - East Region Service	Success
Trencher 2	Trencher	ASC - East Region Service	Success
Trencher 3	Trencher	ASC - East Region Service	Success
Trencher 4	Trencher	ASC - East Region Service	Success
Trencher 5	Trencher	ASC - East Region Service	Success
Trencher 6	Trencher	ASC - East Region Service	Success
Trencher 7	Trencher	ASC - East Region Service	Success
Trencher 8	Trencher	ASC - East Region Service	Success
Trencher 9	Trencher	ASC - East Region Service	Success
Trencher 10	Trencher	ASC - East Region Service	Success

Create Resource Group (Crew Template)

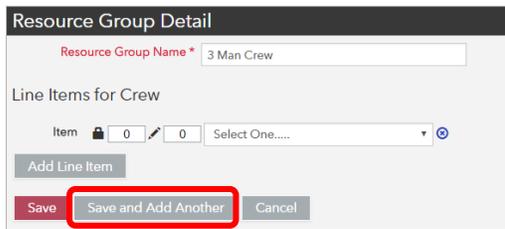
1. Click the Resources tab from the red bar.
2. Click Crews from the drop-down menu to go to the Crew Detail page.



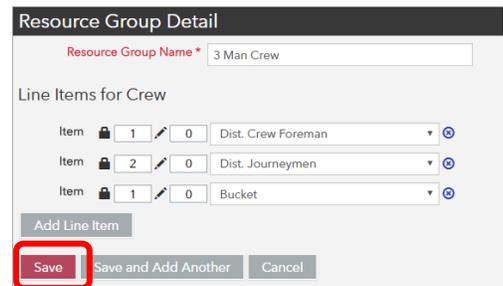
3. Click the 'Resource Groups' button.



4. A Resource Group is a crew of selection resources that might be assigned to a Utility request. Example: A Resource Group called "3 Man Crew" may consist of a Foreman, two Journeyman and Bucket Truck.
5. Add the required Resource Group Name before you build your crew.
6. Select the first Item Resource Type from the drop-down list.
7. Add the number of this Resource Type. The box right of the lock icon is the minimum quantity and the box right of the pencil icon is the maximum that will be added to the minimum quantity.
 - a. For example, locked quantity is 1 and the pencil quantity is 1. The max quantity is 2. To make the max quantity 1, leave the pencil quantity at 0.
8. Click the 'Add Line Item' button to add additional Resource Types into the Resource Group crew.



9. Click Save to save this Resource Group you are creating.
10. Click 'Save and Add Another' to create additional crews.



Adding Crews

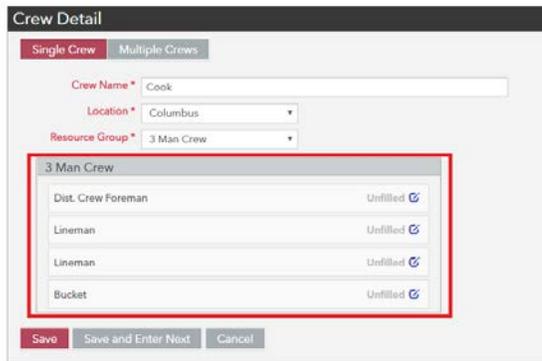
1. Click on the Resources tab from the red bar.
2. Click 'Crews' from the drop-down menu.



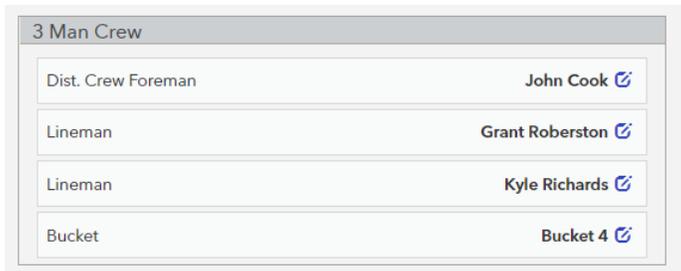
3. Click the 'Add Crews' button.



4. To add a single crew, enter the required fields of Crew Name, Location, Resource Group.



5. Assign the employees/vehicle/equipment to each position within the Crew.
 - a. Click the Edit option, ,
 - b. Select the employees/vehicles/equipment from the drop-down menu that matches the resource type listed.

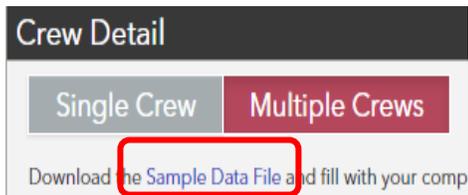


- c. Complete this task for each Crew you create.

- To add multiple crews by uploading a spreadsheet, click on the Multiple Crews button within the Crew Detail screen.



- Click the 'Sample Data File' link to download the excel file



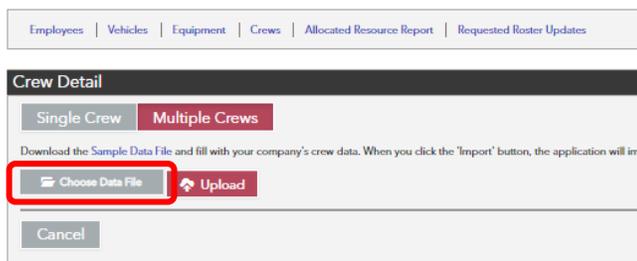
- Enter the requested information into the "Sample Data File". Red fields are required:

Crew Name	Location	Resource Group	Resource Type	Named Resource
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Crew Name	This is the name of the crew
Location	This needs to be a "Location" value in the contractor portal
Resource Group	This is the "Resource Group Name" created in the previous step for the type of crew being imported
Resource Type	This is the "Resource Type" associated with the Employees, Vehicles, Equipment already imported
Named Resource	This is the specific Employee, Vehicle, Equipment name already imported Note – For Employees this will be the employees name in using a single field using the "First Name Last Name" format

- Save it to your computer as a .csv file
- Click the 'Choose Data File' and select your saved file.
- Click the 'Upload button.

Crews



- Confirm the file headers match to each field it is mapped to. Each step uses drop down selections to match data.

Crews

Employees | Vehicles | Equipment | Crews | Allocated

Crew Detail

Single Crew Multiple Crews

Download the Sample Data File and fill with your company's crew data.

samplecrew.csv Upload

Map Fields	Location	Resource Group	Resource Type
Crew Name*	Crew Name		
Location*	Location		
Resource Group*	Resource Group		
Resource Type*	Resource Type		
Named Resource*	Named Resource		
Team Lead	Team Lead		
Crew Lead	Crew Lead		

Next

Cancel

- Continue to click the "Next" button to proceed through the load process.

Crews

Employees | Vehicles | Equipment | Crews | Allocated Resource Report

Crew Detail

Single Crew Multiple Crews

Download the Sample Data File and fill with your company's crew data. When you click the "Next" button, the application will...

samplecrew.csv Upload

Map Fields	Location	Resource Group	Resource Type	Named Resource	Team Lead	Crew Lead
VM Tree Crews*	VM Tree Crews					
VM Wood Management*	VM Wood Management					

Back Next

Cancel

- Review the displayed data before it is imported.
- Click the 'Import' button.

Crews

Employees | Vehicles | Equipment | Crews | Allocated Resource Report | Requested Roster Updates

Crew Detail

Single Crew **Multiple Crews**

Download the Sample Data File and fill with your company's crew data. When you click the 'Import' button, the application will import your data and begin tracking availability.

samplecrew.csv Upload

Map Fields Location Resource Group Resource Type Named Resource Team Lead Crew Lead Import Data Results

1 - 20 of 23 >

Crew Name	Location	Resource Group	Resource Type	Named Resource	Team Lead	Crew Lead
RA DEMO - Test Employee1	RA Demo Test	VM Tree Crews	VM Tree Crew	Test Employee1		
RA DEMO - Test Employee2	RA Demo Test	VM Wood Management	VM Wood Management	Test Employee2		
RA DEMO - Test Employee3	RA Demo Test	VM Tree Crews	VM Tree Crew	Test Employee3		
RA DEMO - Test Employee4	RA Demo Test	VM Wood Management	VM Wood Management	Test Employee4		
RA DEMO - Test Employee5	RA Demo Test	VM Tree Crews	VM Tree Crew	Test Employee5		
RA DEMO - Test Employee6	RA Demo Test	VM Wood Management	VM Wood Management	Test Employee6		
RA DEMO - Test Employee7	RA Demo Test	VM Tree Crews	VM Tree Crew	Test Employee7		
RA DEMO - Test Employee8	RA Demo Test	VM Wood Management	VM Wood Management	Test Employee8		
RA DEMO - Test Employee9	RA Demo Test	VM Tree Crews	VM Tree Crew	Test Employee9		
RA DEMO - Test Employee10	RA Demo Test	VM Wood Management	VM Wood Management	Test Employee10		
RA DEMO - Test Employee11	RA Demo Test	VM Tree Crews	VM Tree Crew	Test Employee11		
RA DEMO - Test Employee12	RA Demo Test	VM Wood Management	VM Wood Management	Test Employee12		
RA DEMO - Test Employee13	RA Demo Test	VM Tree Crews	VM Tree Crew	Test Employee13		
RA DEMO - Test Employee14	RA Demo Test	VM Wood Management	VM Wood Management	Test Employee14		
RA DEMO - Test Employee15	RA Demo Test	VM Tree Crews	VM Tree Crew	Test Employee15		
RA DEMO - Test Employee16	RA Demo Test	VM Wood Management	VM Wood Management	Test Employee16		
RA DEMO - Test Employee17	RA Demo Test	VM Tree Crews	VM Tree Crew	Test Employee17		
RA DEMO - Test Employee18	RA Demo Test	VM Wood Management	VM Wood Management	Test Employee18		
RA DEMO - Test Employee19	RA Demo Test	VM Tree Crews	VM Tree Crew	Test Employee19		
RA DEMO - Test Employee20	RA Demo Test	VM Wood Management	VM Wood Management	Test Employee20		

Back **Import** Cancel

- The final 'Results' page below shows the success or failure of loaded records. Note: Failed records must be reviewed in the .csv file and edited and reloaded.

Crews

Employees | Vehicles | Equipment | Crews | Allocated Resource Report | Requested Roster Updates

Crew Detail

Single Crew **Multiple Crews**

Download the Sample Data File and fill with your company's crew data. When you click the 'Import' button, the application will import your data and begin tracking availability.

samplecrew.csv Upload

Map Fields Location Resource Group Resource Type Named Resource Team Lead Crew Lead Import Data **Results**

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Crew Name	Location	Resource Group	Resource Type	Named Resource	Team Lead	Crew Lead	Result
RA DEMO - Test Employee1	RA Demo Test	VM Tree Crews	VM Tree Crew	Test Employee1			Success
RA DEMO - Test Employee2	RA Demo Test	VM Wood Management	VM Wood Management	Test Employee2			Success
RA DEMO - Test Employee3	RA Demo Test	VM Tree Crews	VM Tree Crew	Test Employee3			A crew with this name already exists.
RA DEMO - Test Employee4	RA Demo Test	VM Wood Management	VM Wood Management	Test Employee4			A crew with this name already exists.
RA DEMO - Test Employee5	RA Demo Test	VM Tree Crews	VM Tree Crew	Test Employee5			A crew with this name already exists.
RA DEMO - Test Employee6	RA Demo Test	VM Wood Management	VM Wood Management	Test Employee6			A crew with this name already exists.
RA DEMO - Test Employee7	RA Demo Test	VM Tree Crews	VM Tree Crew	Test Employee7			A crew with this name already exists.