#### Part 2 - Resource Assist - Adding Resources Guide

#### Contents

Adding Employees	1
Adding Vehicles	5
Adding Equipment	8
Create Resource Group (Crew Template)	11
Adding Crews	12

#### Adding Employees

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

My Events/Requests	Resources 🛨	Account Management +	Reporting
Event Detail - Response saved suc	Employees Vehicles Equipment	on Add, Edit, and Delete	Employees
Send Response Request Name: te	Crews Resource Das Requested Ro	hboard ister Updates	

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.



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



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

mployee Deta	il
Single Employee	Multiple Employees
Download the Sample I	Data File and fill with your company's emp
🗁 Choose Data Fi	le 🧖 Upload
Cancel	

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

	First	Las	t		Share		Share				Team	Crew	Resource	Resource	Resource
	Name	Na	me	e-Mail	e-Mail	Phone	Phone	ID	Location	Gender	Lead	Lead	Types	Types 2	Types 3
First Na	me		First	First Name											
Last Nar	me		Last	Name											
e-Mail			Opti	onal en	nployee	email									
Share e-	-Mail		"Yes	" or "N	o" value	es to in	dicate	sharir	ng emplo	yee ema	il				
Phone			Opti	onal en	nployee	phone	!								
Share Pl	hone		"Yes	" or "N	o" value	es to in	dicate	sharir	ng emplo	yee pho	ne				
ID			This	is an in	ternal t	o the c	ontract	or en	nployee I	D value	and ne	eeds t	o be uniqu	e per emp	oyee
Location	ı		This with	needs	to be a	"Locati	on" val	ue in	the cont	ractor p	ortal tl	nat yo	u want the	e resource	associated
Gender			Emp	loyee g	ender										
Team Le	ead		"Yes	" or "N	o" value	es to in	dicate i	f the	employe	e is a Te	am Le	ad			
Crew Le	ad		"Yes	" or "N	o" value	es to in	dicate i	f the	employe	e is a Cr	ew Lea	ad			
Resource Types This field is used to add associate an employee's "job classification" to an employee Exan "Assessor"					mple										
	Note	– Mult	iple "Re	esource	Type"	can b	be added	by using	g a nev	v colu	mn for eac	h value			

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

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

Employees Vehicles	Equipment   Crews   Allocated Resource Repo
Employee Detail	
Single Employee	Multiple Employees
Download the Sample Data File	and fill with your company's employee data. When yo
🖙 Choose Data File	💠 Upload
Cancel	

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.

Employee Detail		
Employees   Vehicles   Equipment   Gross   Allocated Boson	on Report   Responsed Reser	
Employee Detail		
Single Employee Multiple Employees	Employee Detail	
Download the Sample Data Fale and Mask your company's employee the 20 Sample Dirg Aryan Employment of Same Zener		
Map Fields Share e Mail Share Picere Location Gender	Employees Vehicles Equipment	nt   Crews   Allocated Resource Report   Reg
Last Narros * Last Norros *	Employee Detail	Employee Detail
a Mail - Mail + Share e Mail Share e Mail +	Single Employee Mult	Employees   Vehicles   Equipment   Crews   Allocated Resource Report   Reg
Phone Phone V	Download the Sample Data File and fill w	Employee Detail
	SampleEmployeeRegistrationDat	Single Employee Multiple Employees
Gender Conston V	Map Fields Share e-Mail Share F	Ph Download the Sample Data File and fill with your company's employee data. When you click the
Them Lead Team Lead ¥ Crew Lead Crew Lead ¥	Yes	SampleEmployeeRegistrationDatav2.csv 🔷 Upload
Resource Types Link Name	Back Next	Map Fields   Share e-Mail   Share Phone   Location   Gender   Team Lead   Cre
Phone Share Phone ID	Cancel	Yes Yes V
Location Genetier Team Level		Back Next
Next		Cancel
Cancel		
Employee Detail		
Employees Vehicles Equipment Crews	Employee Detail	
Employee Detail		Employee Detail
Single Employee Multiple Employ	Employees Vehicles Equipme	ent Crewe Employees Vehicles Equipment Crews Allocated Resource Report Rei
Download the Sample Data File and fill with your company	Employee Detail	
Sample Foolage Bacistration Date/2 csv	Circle Freedower	Employee Detail
	Single Employee Mu	Single Employee Multiple Employees
Map Fields Share e-Mail Share Phone Location	Download the sample Data File and fill v	Download the Sample Data File and fill with your company's employee data. When you click th
Past Next	SampleEmployeekegistationDa	🔄 SampleEmployeeRegistrationDatav2.csv
	Map Fields Share e-Mail Share	Phone Lo
Cancel	M	
	Back Next	Yes Yes V
Employee Detail		Back Next
Linployee Detail		
Employees Vehicles Equipment Crews Alloca	ted Resource Report   Requ Emp	loyee Detail
Employee Detail	Emplo	yees Vehicles Equipment Crews Allocated Resource Report Requested Roster Updates
Single Employee Multiple Employees	Emplo	vee Detail
Download the Sample Data File and fill with your company's empl	oyee data. When you click the	
🔄 SampleEmployeeRegistrationDatav2.csv	Sing	gle Employee Multiple Employees
	Downloa	ad the Sample Data File and fill with your company's employee data. When you click the 'Import' button, the application
Map Fields Share e-Mail Share Phone Location G	ender Team Lead Crev	SampleEmployeeRegistrationDatav2.csv 🔷 Upload
Yes Ver V	Мар Б	ields Share e-Mail Share Phone Location Gender Team Lead Crew Lead Resource Types
Back Next		VM Tree Crew VM Tree Crew
		VM Wood Management
Cancel	Bad	k Next
	Car	ncel

- 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											
imployee Detail											
Single Employee Multiple Employees											
Download the S	Sample Data File and	fill with your c	ompany's employee o	data. When you click	the 'Import' button, t	he application will in	nport your data and b	egin tracking av	ailability.		
🗁 Sample	EmployeeRegistratio	nDatav2.csv	🔷 Upload								
Sample	EmployeeRegistratio	nDatav2.csv are Phone	Upload     Location Gender	Team Lead	Crew Lead Resour	ce Types Import	Data Results				
Map Fields 1 - 20 of 23 > First Name	EmployeeRegistratio	nDatav2.csv are Phone	Vpload     Location Gender     Share e-Mail	Team Lead	Crew Lead Resour	ce Types Import	Data Results	Gender	Team Lead	Crew Lead	Resource Types
France Sample	EmployeeRegistratio Share e-Mail Sh Last Name Employee44	nDatav2.csv are Phone	Upload     Location Gender     Share e-Mail     Yos	Team Lead         0           Phone         1111111111	Crew Lead Resour Share Phone Yes	ce Types Import	Data Results Location RA Demo Test	Gender	Team Lead Yes	Crew Lead Yes	Resource Types VM Tree Crew, VM Vicod Management
Map Fields 1 - 20 of 23 > First Name Test Test	EmployeeRegistratio Share e-Mail Sh Last Name EmployeeM	nDatav2.csv are Phone	Vpload     Location Gender     Share e-Mail     Yes     No	Team Lead     Phone     111111111     111111130	Crew Lead Resour Share Phone Yes No	ce Types Import ID 70303432 142885560	Data Results Location RA Demo Test RA Demo Test	Gender M F	Team Lead Yes No	Crew Load Yes No	Resource Types VM Tree Crew VM Wood Management VM Tree Crew VM Wood Management
Sample Map Fields 1 - 20 of 23 > First Name Test Test Back	EmployeeRegistratio Share e-Mail Sh Last Name Employee44 Import	nDatav2.csv are Phone o-Mail	Cation Gender Share e-Mail Yes No	Team Lead         I           Phone         111111111           1111111111         1111111130	Crew Lead Resource Share Phone Yes No	ce Types Import ID 70303432 142885560	Data Results Location RA Demo Test RA Demo Test	Gender M F	Team Lead Yes No	Crew Losd Yes No	Resource Types VM Time Crew, VM Wood Management VM Time Crew, VM Wood Management

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 Alloca	ted Resource Report	Requested Ro	ster Updates						
nployee	Detail										
Single E	mployee Multip	le Employees									
ownload the	sample Data File and fill with	your company's emp	loyee data. When you	click the 'Import'	button, the applicat	ion will import your d	ata and begin	tracking availabil	ity.		
🚍 Sample	EmployeeRegistrationDatav	2.csv 🛛 🧖 Upl	oad								
MERI				ا ب م ا	n T	1 .0. 0					
- 20 of 23 >	Share e-Mail Share Fri	ne Location C	lean Lead	Crew Lead	Resource types	Import Data Ke	ulles				
First Name	Last Name e-Ma	il Share e-Mail	Phone	Share Phone	D	Location	Gender	Team Lead	Crew Lead	Resource Types	Result
Test	Employee44	Yes	111111111	Yes	70303432	RA Demo Test	М	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
lest	Employee46	No	1111111113	No	77943656	RA Demo Test	м	No	No	VM Tree Crew, VM Wood Management	Success
est	Employee47	No	1111111114	No	81763768	RA Demo Test	F	No	No	VM Tree Crew, VM Wood Management	Success
est	Employee48	Yes	1111111115	Yes	85583880	RA Demo Test	м	Yes	Yes	VM Tree Crew, VM Wood Management	Success
est	Employee49	No	1111111116	No	89403992	RA Demo Test	F	No	No	VM Tree Crew, VM Wood Management	Success
est	Employee50	No	1111111117	No	93224104	RA Demo Test	м	No	No	VM Tree Crew, VM Wood Management	Success
est	Employee51	No	1111111118	No	97044216	RA Demo Test	F	No	No	VM Tree Crew, VM Wood Management	Success
est	Employee52	Yes	1111111119	Yes	100864328	RA Demo Test	м	Yes	Yes	VM Tree Crew, VM Wood Management	Success
est	Employee53	No	1111111120	No	104684440	RA Demo Test	F	No	No	VM Tree Crew, VM Wood Management	Success
est	Employee54	No	1111111121	No	108504552	RA Demo Test	м	No	No	VM Tree Crew, VM Wood Management	Success
est	Employee55	No	1111111122	No	112324664	RA Demo Test	F	No	No	VM Tree Crew, VM Wood Management	Success
est	Employee56	Yes	1111111123	Yes	116144776	RA Demo Test	м	Yes	Yes	VM Tree Crew, VM Wood Management	Success
est	Employee57	No	1111111124	No	119964888	RA Demo Test	F	No	No	VM Tree Crew, VM Wood Management	Success
est	Employee58	No	1111111125	No	123785000	RA Demo Test	м	No	No	VM Tree Crew, VM Wood Management	Success
est	Employee59	No	1111111126	No	127605112	RA Demo Test	F	No	No	VM Tree Crew, VM Wood Management	Success
est	Employee60	Yes	1111111127	Yes	131425224	RA Demo Test	м	Yes	Yes	VM Tree Crew, VM Wood Management	Success
est	Employee61	No	1111111128	No	135245336	RA Demo Test	F	No	No	VM Tree Crew, VM Wood Management	Success
est	Employee62	No	1111111129	No	139065448	RA Demo Test	м	No	No	VM Tree Crew, VM Wood Management	Success
est	Employee63	No	1111111130	No	142885560	RA Demo Test	F	No	No	VM Tree Crew, VM Wood Management	Success

# **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.



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



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



7. 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.

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



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

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

Vehicle Detail					
Single Vehicle	Multiple Vehicle				
Download the Sample Data Sample VehicleRegis Map Fields Resource Resource Name * 6 Resource Type * 6 License Plate * 1 State * 5 Location * 1 Next	Vehicle Detail Single Vehicle Mut Download the Sample Data File an SampleVehicleRegistration Map Fields Resource Type Bucket Truck * Bucket T Back Next	Vehicle Detail Single Vehicle Download the Sample Data SampleVehicleReg Map Fields Resource Ohio*	Multiple Vehicle File and fill with Vehicle istrationData.csv Type State Ohio to 10	2 2 Detail 3 le Vehicle Multiple V 4 the Sample Data File and fill with 3 ample/WhicleRegistrationData.csv	Sehicle
		Back Next	Bac	RA Demo test * ASC - East Region	Service V

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

Vehicle Detail					
Single Vehicle Multiple	e Vehicle				
Download the Sample Data File and fill w	ith your company's vehicle data. When you click	the 'Import' button, the application will import you	ar data and begin tracking availabil	ity.	
SampleVehicleRegistrationData.c	av 🔷 Upload				
Map Fields Resource Type State	Location Import Data Results				
Resource Name	Resource Type	License Plate	State	Location	
Truck 1	Bucket Truck	11111	Ohio	ASC - East Region Service	
Truck 2	Bucket Truck	11112	Ohio	ASC - East Region Service	
Truck 3	Bucket Truck	11113	Ohio	ASC - East Region Service	
Truck 4	Bucket Truck	11114	Ohio	ASC - East Region Service	
Truck 5	Bucket Truck	11115	Ohio	ASC - East Region Service	
Truck 6	Bucket Truck	11116	Ohio	ASC - East Region Service	
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.

Vehicle Detail					
Single Vehicle Mu	Itiple Vehicle				
Download the Sample Data File an	d fill with your company's vehicle data. When	you click the 'Import' button, the application	on will import your data and l	begin tracking availability.	
SampleVehicleRegistration	Data.csv 🔷 Upload				
Map Fields Resource Type	State Location Import Data Resu	lits			
Resource Name	Resource Type	License Plate	State	Location	Result
Truck 1	Bucket Truck	11111	Ohio	ASC - East Region Service	Success
Truck 2	Bucket Truck	11112	Ohio	ASC - East Region Service	Success
Truck 3	Bucket Truck	11113	Ohio	ASC - East Region Service	Success
Truck 4	Bucket Truck	11114	Ohio	ASC - East Region Service	Success
Truck 5	Bucket Truck	11115	Ohio	ASC - East Region Service	Success
Truck 6	Bucket Truck	11116	Ohio	ASC - East Region Service	Success
Cancel					

# Adding Equipment

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



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

Incoming Requests	Connections	R
Equipment		
Employees Vehicles	Equipment Crev	vs
• Add Equipment	(s)	

- 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.

Equipment Detai	I				
Single Equipme	ent	Multip	le Eq	uipmen	t
Resource Name *					
Resource Type *	Pleas	e Select		¥	
Location *	Selec	t location		٣	
Save Save	and I	Enter Nex	t	Cance	ł

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



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

Equipment Detail	
Single Equipment	Multiple Equipment
Download the Sample Data File	nd fill with your company's equipment dat
🗁 Choose Data File	💠 Upload
Cancel	

Resource	Name	Resource Type	Location	Ĩ
Resource Name	Name = Eq	uipment Name		
Resource Types	Types = Thi "Digger"	s field is used to add asso	ociate a piece of equipm	ent to a "Resource Type" Example
Location	This needs associated	to be a "Location" value with	in the contractor portal	that you want the resource

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

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

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



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

<u> </u>	quipmen	Deta					
	Single E	quipm	ent	Multiple	e Equipme	nt	
1	Download the S	iample D	ata File ar	nd fill with you	ur company's ec	uipment da	ta
	🗁 Sample	Equipme	ntRegistr	ationData.csv	🔷 Vp	load	
	Map Fields	Resource	ce Tree	Location	Import Data	Results	
			ce ijpe				
	Resource	e Name	Resour	ce Name	T	1	
	Resouro	e Name ce Type	Resour Resour	ce Name ce Type	<b>v</b>	1	
	Resource Resource L	e Name ce Type ocation	Resour Resour	ce Name ce Type m	T T T		

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

Equipment Detail			
Single Equipment	Aultiple Equipment		
Download the Sample Data File and	Equipment Detail		
🗁 SampleEquipmentRegistra	Single Equipment	Equipment Detail	
Map Fields Resource Type	Download the Sample Data File and	Single Equipment	Multiple Equipment
Resource Name * Resource	🗁 SampleEquipmentRegistrati	Download the Sample Data File and	fill with your company's equipment
Resource Type * Resource	Map Fields Resource Type	🗁 SampleEquipmentRegistrati	ionData.csv 🔷 🔷 Upload
Next	Back Next	Map Fields Resource Type RA Demo test ASC - Far Back Next	Location Import Data Result at Region Service V

- 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	ata. When you click the 'Import' button, the application will import your dat	a and begin tracking availability.
🚍 SampleEquipmentRegistrationData.csv 🛛 🔷 Upload		
Map Fields Resource Type Location Import Data Results		
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 2	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 Equi	pment		
Download the Sample Data File and fill with your compa	iny's equipment data. When you click the 'Impor	t' button, the application will import your data and begin tracking availability.	
SampleEquipmentRegistrationData.csv	Upload		
Map Fields Resource Type Location Import 1 - 10 of 10	t Data Results		
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.

My Events/Requests     Resources •     Account Management •     Reporting       Crews     Employees Vehicles     Employees Vehicles     Employees Part •     Employees       Imployees     Vehicles     Equipment •     Report •       Crews     Equipment •     Report •     Requested Roster Updates       O Add Crew(s)     Resource Data boord Resource Roster Up / Add, edit, and Delete Crews     Employees				N   💓   👹 Hint   Logout   Username: Kesource Assist   Immezo
Crews Employees Vehicles Equipment Requested Rester Updates Crews O Add Crew(s) Resource Dashboard Restore Up Add, edit, and Delete Crews	My Events/Requests	Resources 👻 Account Ma	nagement <del>-</del> Reporting	
Vehicles         Equipment         Report   Requested Rater Updates           OAdd Crew(s)         Resource Dashboard         Resource Lip_Add, edit, and Delete Crews	Crews	Employees		
Employees Vehicles Equipment Beport Requested Roster Updates Crews Add Crew(s) Resource Dashboard Resource Lip Add, edit, and Delete Crews	010 003	Vehicles		
Add Crew(s)     Resource Dashboard     Add, edit, and Delete Crews	Employees Vehicles	Equipment	Report Requested Roster Up	Updates
Add Crew(s)     Resource Dashboard     Requested Rester Line Add, edit, and Delete Crews		Crews		
Requested Roster Llos Add, edit, and Delete Crews	Add Crew(s)	Resource Dashboard		
Reducated Hoster Oparate		Requested Roster Up	I, edit, and Delete Crews	

3. Click the 'Resource Groups' button.

				📞   🔮   🚔 Print   Logout   Username: Joe Contractor 793   Timezone: ET
My Events/Requests	Resources 👻	Account Management 👻	Reporting	
Crews				
Employees Vehicles	Equipment	Crews Allocated Resource Re	eport   Requeste	ed Roster Updates
◆ Add Crew(s) Res	ource Groups			

- 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.

Resource Group Detail	
Resource Group Name * 3 Man Crew	
Line Items for Crew	
Item 🔒 0 🖍 0 Select One 🔻 🞯	
Add Line Item	
Save Save and Add Another Cancel	

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

Item A 1 2 0 Dict Grow Foromon	
Item 🔒 1 🖉 0 Dist Crow Foroman	
	8
Item 🔒 2 🖍 0 Dist. Journeymen	8
Item 🔒 1 🖍 0 Bucket	8

#### 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.

My Events/Requests	Resources +	Account Management +	Reporting	C   O   A Print   Logout   Username: Joe Contractor 793   Timezone
Crews				
Employees Vehicles	Equipment	Crews   Allocated Resource Re	eport   Requested Roster	Updates
• Add Crew(s) Res	ource Groups			

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

Crew Name *	Cook	
Location *	Columbus	
ource Group *	3 Man Crew	
an Crew		
neman	in	Unfilled Ø
neman		Unfilled 🕑
ucket		Unfilled 🐼

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

3 Man Crew	
Dist. Crew Foreman	John Cook 🗹
Lineman	Grant Roberston 🗭
Lineman	Kyle Richards 🗭
Bucket	Bucket 4 🗹

c. Complete this task for each Crew you create.

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



7. Click the 'Sample Data File' link to download the excel file



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

Crew Name	Location	Resource Group	Resource Type	Named Resource

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

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



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

Crews	
Employees Vehicle	es   Equipment   Crews   Allocated
Crew Detail	
Single Crew	Multiple Crews
Download the Sample D	ata File and fill with your company's crew dat
🗁 samplecrew .csv	🔷 Upload
Map Fields Locatio	р Регонтсе Стите Регонтсе Туре
Crew Name*	Crew Name 🔻
Location*	Location <b>T</b>
Resource Group*	Resource Group 🔻
Resource Type*	Resource Type 🔻
Named Resource*	Named Resource V
Team Lea	Team Lead 🔻
Crew Lead	Crew Lead 🔻
Next	
Cancel	

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

Crews			
Employees   Vehicles   Equipment   Cn	Crews	Crews	
Crew Detail	Employees   Vehicles   E		
Download the Sample Data File and fill with your of	Crew Detail	Employees   venicles   Equipment   Crews	Autoca
🖙 samplecrew .csv 🔷 🔷 Upload	Single Crew Mul	Crew Detail	rews
Map Fields Location Resource Group Crew Name * Crew Name	Download the Sample Data File a	Single Crew Multiple Crews	Employees   Vehicles   Equipment   Crews   Allocated Resource Re
Location * Location Resource Group * Resource Group	🖙 samplecrew.csv	Download the Sample Data File and fill with your co	rew Detail
Resource Type * Resource Type Named Resource * Named Resource	Map Fields Location Re RA Demo test* RA De	Map Fields Location Resource Group F	Single Crew Multiple Crews
Team Lead Team Lead Crew Lead Crew Lead	Back Next	VM Tree Crews * VM Tree Crews	🖙 samplecrew.cov 🔷 Upload
Next	Cancel	VM Wood Management	Map Fields Location Resource Group Resource Type Named Reso
Cancel		Back	/M Wood Management VM Wood Management V
		Cancel	Back Next
Crews		1	Cancel
Employees   Vehicles   Equipment   Crews   Alloca	ted Resource Report   R Crews		
Crew Detail	Imployees	Vehicles   Equipment   Green   Allocated Resource Report   Requested Ro	nuw Updan
Single Crew Multiple Crews Download the Sample Data File and fill with your company's crew	data. When you click the 's		Crews
🖙 semplecrew.cav	Single Of Developed the Se	me Multiple Crews angle Data File and fill with your company's crew data. When your dick the 'impost' battor	Tanjkingens   Veldels   Equipment   Genes   Albicated Resource Report   Requested Roster Updates
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Test Employee?	Map Fields	Location Resource Group Resource Type Named Resource Team Lead	Erro Franziscenzaw PUpload Monfelds, London, Resource and Resource Londont Concless Anne
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- 15. Review the displayed data before it is imported.
- 16. Click the 'Import' button.

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Crews	5

kingle Crew Multiple Crews nead the Sangle Data Rie and Rie was company's new data. When you dick the "monor battom, the application will import you data and begin tracking availability.	w Detail						
marka the Sample Data File and Hinking-use company's new data. When you dick the 'import' batton, the application will import your data and begin tracking availability.	Single Crew Multiple	Crews					
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Resource Type         Resource Type         Named Resource         Team Lead         Crew Lead         type Type         Named Resource         Team Lead         Crew Lead         type Type         Named Resource         Team Lead         Crew Lead         Team Lead         Crew Lead         Resource Type         Named Resource         Team Lead         Crew Lead         Resource Type         Named Resource         Team Lead         Crew Lead           ADIMO         Test Implayees2         RA Demo Test         VM Keed Management         VM Keed Management         Test Implayee3         Test Implayee3         Test Implayee3         RA Demo Test         VM Keed Management         Test Implayee3         Test Implayee3 <t< th=""><th>🚍 samplecrew.csv 🛛 😞 Up</th><th>bload</th><th></th><th></th><th></th><th></th><th></th></t<>	🚍 samplecrew.csv 🛛 😞 Up	bload					
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BADEMO: Iest Employee2         BADemo Iest         VM Wood Management         VM Wood Management         Iest Employee2           BADEMO: Iest Employee3         BADemo Iest         VM Ieee Crew         VM Ieee Crew         Iest Employee3         Iest Employee3           BADEMO: Iest Employee3         BADemo Iest         VM Wood Management         VM Wood Management         VM Wood Management         Iest Employee3           BADEMO: Iest Employee6         BADemo Iest         VM Wood Management         VM Wood Management         VM Wood Management         Iest Employee5           BADEMO: Iest Employee6         BADemo Iest         VM Wood Management         VM Wood Management         Iest Employee6           BADEMO: Iest Employee6         RADemo Iest         VM Wood Management         VM Wood Management         Iest Employee7           BADEMO: Iest Employee6         RADemo Iest         VM Wood Management         VM Wood Management         Iest Employee7           BADEMO: Iest Employee10         BADemo Iest         VM Wood Management         VM Wood Management         Iest Employee10           BADEMO: Iest Employee11         BADemo Iest         VM Wood Management         Iest Employee11         Iest Employee13           BADEMO: Iest Employee13         BADemo Iest         VM Wood Management         Iest Employee13         Iest Employee13           BADEMO: Ies	A DEMO - Test Employee1	RA Demo Test	VM Tree Crews	VM Tree Crew	Test Employee1		
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BADEMO-1est Imployee4         BADemo Test         VM Wood Management         VM Wood Management         Feat Imployee4           BADEMO-1est Imployee5         BADemo Test         VM Iree Crew         VM Iree Crew         Test Imployee5           BADEMO-1est Imployee5         BADemo Test         VM Iree Crew         VM Wood Management         VM Wood Management         Test Imployee5           BADEMO-1est Imployee5         BADemo Test         VM Wood Management         VM Wood Management         Test Imployee5           BADEMO-1est Imployee6         BADemo Test         VM Wood Management         VM Wood Management         Test Imployee7           BADEMO-1est Imployee6         BADemo Test         VM Wood Management         VM Wood Management         Test Imployee7           BADEMO-1est Imployee6         BADemo Test         VM Wood Management         VM Wood Management         Test Imployee1           BADEMO-1est Imployee71         BADemo Test         VM Wood Management         VM Wood Management         Test Imployee12           BADEMO-1est Imployee71         BADemo Test         VM Wood Management         VM Wood Management         Test Imployee12           BADEMO-1est Imployee71         BADemo Test         VM Wood Management         VM Wood Management         Test Imployee14           BADEMO-1est Imployee71         BADemo Test         VM Wood Management </td <td>A DEMO - Test Employee3</td> <td>RA Demo Test</td> <td>VM Tree Crews</td> <td>VM Tree Crew</td> <td>Test Employee3</td> <td></td> <td></td>	A DEMO - Test Employee3	RA Demo Test	VM Tree Crews	VM Tree Crew	Test Employee3		
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ADEMO-Test Employee7         RAD Demo Test         WI free Crew         VM Tese Crew         Test Employee7           ADEMO-Test Employee8         RAD Demo Test         WM Wood Management         VM Wood Management         Test Employee8           ADEMO-Test Employee9         RAD Demo Test         WM Wood Management         WM Tese Crew         Test Employee1           ADEMO-Test Employee10         RAD Demo Test         WM Wood Management         WM Wood Management         Test Employee10           ADEMO-Test Employee11         RAD Demo Test         WM Wood Management         WM Wood Management         Test Employee11           ADEMO-Test Employee12         RAD Demo Test         WM Wood Management         WM Wood Management         Test Employee12           ADEMO-Test Employee13         RAD Demo Test         WM Wood Management         WM Wood Management         Test Employee14           ADEMO-Test Employee14         RAD Demo Test         WM Wood Management         WM Wood Management         Test Employee15           ADEMO-Test Employee14         RAD Demo Test         WM Wood Management         WM Wood Management         Test Employee16           ADEMO-Test Employee16         RAD Demo Test         WM Wood Management         Test Employee16         MEMO           ADEMO-Test Employee16         RAD Demo Test         WM Wood Management         Test Employee17	A DEMO - Test Employee6	RA Demo Test	VM Wood Management	VM Wood Management	Test Employee6		
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AD DEMO Creat Employee15         RA Demo Test         WI Inser-Crew         WI Inser-Crew         Test Employee15           AD DEMO Creat Employee16         RA Demo Test         WI Wood Management         VM Wood Management         Test Employee16           AD DEMO Creat Employee16         WI Inser-Crew         WI Inser-Crew         Test Employee17           AD DEMO Creat Employee17         RA Demo Test         WI Wood Management         VM Wood Management         Test Employee18           AD DEMO Creat Employee18         RA Demo Test         WI Wood Management         VM Wood Management         Test Employee19           AD DEMO Creat Employee19         RA Demo Test         WI Wood Management         Test Employee19         VM Wood Management         Test Employee19           AD DEMO Creat Employee19         RA Demo Test         WI Wood Management         Test Employee19         VM Wood Management         Test Employee19	A DEMO - Test Employee14	RA Demo Test	VM Wood Management	VM Wood Management	Test Employee14		
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XA DEMO:         Test Employee17         RA Demo Test         VM Iree Grews         VM Iree Grews         Test Employee17           XA DEMO:         Test Employee18         RA Demo Test         VM Wood Management         Test Employee18           XA DEMO:         Test Employee19         RA Demo Test         VM Wood Management         Test Employee19           XA DEMO:         Test Employee19         RA Demo Test         VM Iree Grews         VM Test Employee19           XA DEMO:         Test Employee12         VM Wood Management         Test Employee19	A DEMO - Test Employee16	RA Demo Test	VM Wood Management	VM Wood Management	Test Employee16		
RADEMO - Test Employee18         RADemo Test         VM Wood Management         VM Wood Management         Test Employee18           RADEMO - Test Employee19         RADemo Test         VM Hee Crew         VM Tese Crew         Test Employee19           RADEMO - Test Employee10         RADemo Test         VM Hee Crew         VM Tese Crew         Test Employee19           RADEMO - Test Employee10         VM Vest Management         VM Vest Management         Test Employee20	A DEMO - Test Employee17	RA Demo Test	VM Tree Crews	VM Tree Crew	Test Employee17		
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	A DEMO, Just Free Just 20	RA Demo Test	VM Wood Management	VM Wood Management	Test Employee20		

17. 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 Multi	ple Crews						
Download the Sample Data File and	d fill with your comp	any's crew data. When you clic	k the 'Import' button, the app	lication will import your	data and begin	tracking availab	sility.
🗁 samplecrew .csv 🛛 条	Upload						
Map Fields Location Reso	ource Group Reso	ource Type Named Resourc	ce Team Lead Crew Le	ad Import Data	Results		
1 - 20 of 23 >							
Crew Name	Location	Resource Group	Resource Type	Named Resource	Team Lead	Crew Lev 1	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.