




Quick Reference Card

Working with Resource Records


OVERVIEW

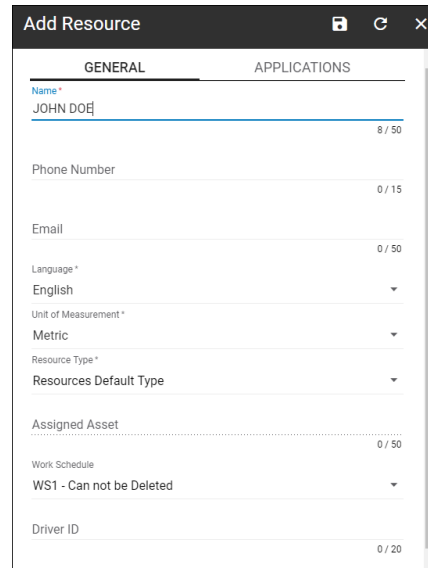
Resources are your Drivers or Employees. They are the people you can assign to an Asset. As an optional feature, assigning Resources allows you to view which Resource was assigned to an Asset and for how long. This is helpful for reporting purposes and rule notifications.

ACCESS RESOURCES

1. Log in to Fleet Complete
2. From the *Tracking* screen, click the **Menu Bar** icon on the top left-hand corner to access the Navigation Panel

3. Click the **Manage** menu item
4. Click the **Resources** submenu item

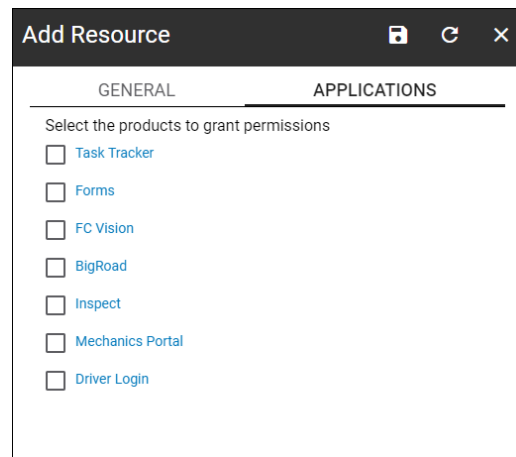
ADD A RESOURCE RECORD

1. Complete steps 1-4 from **Access Resources**
2. Select **Resources**
3. Click the **Add** button 
4. In the *Add Resource* screen on the *General* tab, In the **Name** field, type the name of the Resource
5. Optionally, type the resource's **Phone Number** and / or **Email Address**.
6. From the **Resource Type** drop-down menu, select the Resource Type for this resource
7. From the **Language** drop-down menu, select the preferred language for the resource
8. From the **Unit of Measurement** drop-down menu, select the preferred units of measurement for the resource
9. The **Assigned Asset** field is a read-only field. It will display the Assigned Asset name for this Resource record
10. From the **Work Schedule** drop-down menu, select a Work Schedule if anything other than the default 24/7
11. If using a **Driver ID** solution, type the Driver ID number



The screenshot shows the 'Add Resource' form with the 'GENERAL' tab selected. The 'Name' field contains 'JOHN DOE'. Other fields include 'Phone Number', 'Email', 'Language' (set to English), 'Unit of Measurement', 'Metric', 'Resource Type', 'Assigned Asset', 'Work Schedule' (set to 'WS1 - Can not be Deleted'), and 'Driver ID'.

12. Click the **Applications** tab, type the **Email Address** of the Resource
13. Click **Submit**
14. **Select** the checkboxes next to any additional products that you need your Resource to have access to



The screenshot shows the 'Add Resource' form with the 'APPLICATIONS' tab selected. It displays a list of products to grant permissions: Task Tracker, Forms, FC Vision, BigRoad, Inspect, Mechanics Portal, and Driver Login. All checkboxes are currently unchecked.


15. Click the **Save** button 

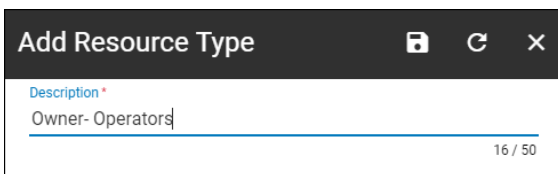


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ADD A RESOURCE TYPE

Resource Types are used to categorize each of your Resource Records into groups. These categories are helpful for reporting purposes, filtering information and creating rules.



1. Complete steps 1-4 from **Access Resources**
2. Select **Resource Type**
3. Click the **Add** button 
4. Type the **Description** for the Resource type



5. Click the **Save** button 

ASSIGN A RESOURCE RECORD TO AN ASSET

Resources can be assigned to specific Assets. This can be useful for tracking and/or reporting purposes.

1. Log in to Fleet Complete
2. From the *Tracking* screen, click the **Menu Bar** icon on the top left-hand corner to access the Navigation Panel  Track
3. Click the **Manage** menu item
4. Click the **Assets** submenu item
5. From the left panel, click an existing asset for its corresponding information to display on the right side of the screen
6. On the *General* tab, click the **Resource** dropdown to select an existing Resource Record from the list
7. Click the **Save** button 

TO LEARN MORE ABOUT RESOURCES

To learn more about Resources, click the **Help** button located in the top right-hand corner of the tracking screen and perform a keyword search.