

Working with Resources

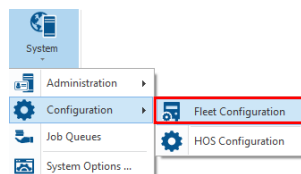
ABOUT RESOURCES

If you want to know who has been using which of your assets and when, and not only what has been done by an asset, then you need to set up your Resources. A Resource is an individual (not necessarily a Fleet Complete user) who works for your organization and operates an Asset.

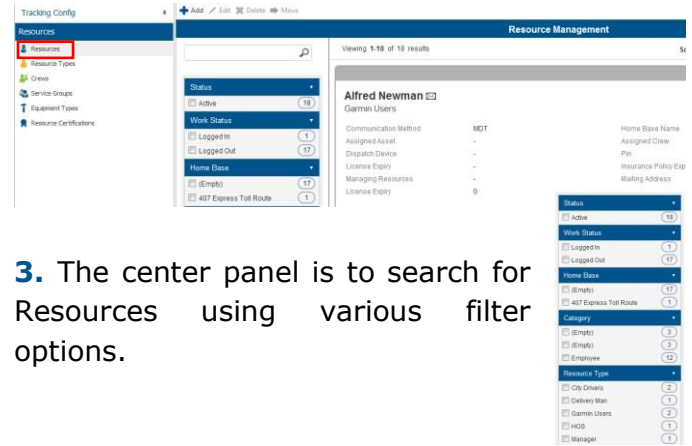
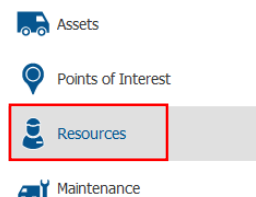
Resources are assigned to Assets in Fleet Complete. By default, this association is done manually in Fleet Complete; however, there are complementary technologies that allow for dynamic association. Specifically, through a Driver ID Key Fob or a Login PIN for a Garmin GPS device, or the Resource Tracker solution. This allows multiple Resources to share responsibility for an Asset.

ACCESSING RESOURCES

1. From the main toolbar, click **System** -> **Configuration** -> **Fleet Configuration**



2. From the left panel, select **Resources** and the *Resources* sub-section to see a list of any existing entries. A new account would have none.

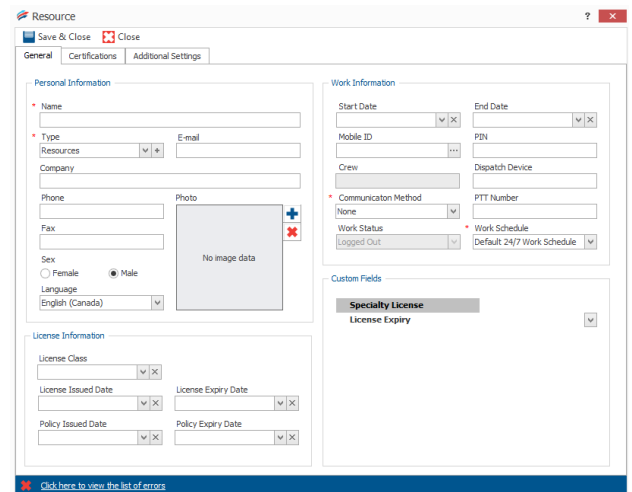


3. The center panel is to search for Resources using various filter options.

ADDING/EDITING A RESOURCE

1. To add a new Resource, click **ADD**.

2. In the dialogue box, enter all mandatory information marked with a red asterisk (*) as well as any optional information as required.



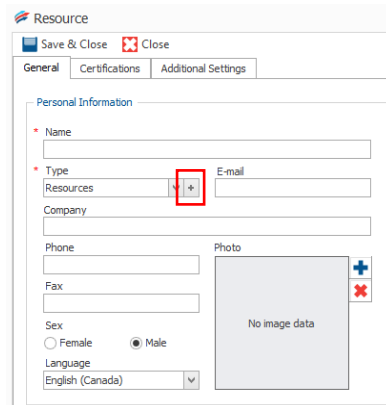
3. Use the *Additional Settings* tab to continue entering information, such as additional contact information, as required.

5. To edit a Resource, select the Resource from the list and either double-click or click **Edit**.

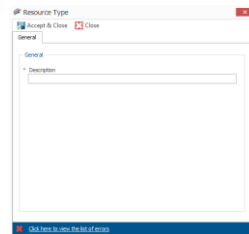
CREATING RESOURCE TYPES

Resource Types are useful for organizational and reporting purposes.

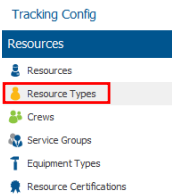
1. To create a new Resource Type from the **Add** dialogue window, click the **+** button to the right of the Type field.



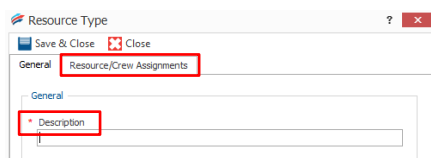
2. Enter a Description and click **Accept & Close**.



3. From **Resource Type** subsection, click **Add**.



4. Enter a Description and from the **Resource/Crew Assignment** tab, select the Resources who belong to the new Resource Type.



5. Click **Save & Close**.

CREWS & SERVICE GROUPS

A **Crew** is a group of Resources that is considered to be a single entity. A Resource can be part of only one Crew at a time. The Crew



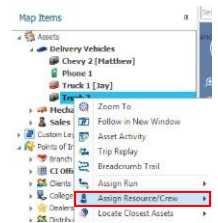
itself is assigned a Resource Type, allowing type-based reporting to include Crews as well as individual Resources.

Service Groups are logical groupings of Resources and Crews, with a defined Supervisor (a Fleet Complete user, not a Resource). They are typically used to group Resources based on geographical area. Service Groups can be associated with an activity and are also used for reporting purposes.

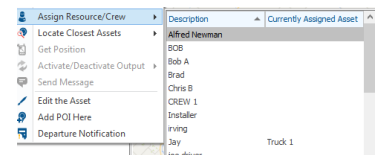
ASSIGNING A RESOURCE/CREW TO AN ASSET

Resources and/or Crews can be associated with specific Assets in Fleet Complete. This can be useful for Tracking and/or Reporting purposes.

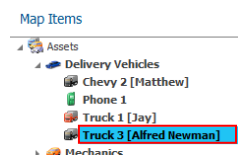
1. From the Tracking screen in the Map Items panel tree, right click on the Asset and select **Assign Resource/Crew**.




2. From the list of Resources that appears, double-click the Resource to assign to the Asset.



3. The Resource then displays next to the Asset in brackets in the Map Items panel tree.



TO LEARN MORE ABOUT RESOURCES

To learn more about **Resources**, click the  button from the **Quick Access** toolbar located in the top left hand corner of the application and perform a keyword search.