

# ViewPoint LADWP Subcontractor Registration & Onboarding

## Technology Operations

This guide is here to help you with the onboarding of Subcontractors to ViewPoint. It provides an overview of key features along with step-by-step instructions to improve your experience and efficiency.

# Table of Contents

---

<b>1. Introduction .....</b>	<b>1</b>
<b>2. Organization Registration.....</b>	<b>2</b>
<b>2.1 – Prepare Box Folder Structure for LADWP Subcontractor Registrations .....</b>	<b>2</b>
2.1.1 – Box Folder Structure Breakdown.....	2
<b>2.2 – Complete LADWP Subcontractor Registration PDF Form.....</b>	<b>3</b>
2.2.1 – Subcontractor Details .....	3
2.2.2 – Documentation .....	5
2.2.3 – Submit Documents .....	7
<b>2.3 – Post LADWP Subcontractor Registration PDF Form Submittal .....</b>	<b>8</b>
<b>3. Onboarding Users.....</b>	<b>9</b>
<b>3.1 – Locating ACD Activation Form .....</b>	<b>9</b>
3.1.1 – Adding ACD Activation Form to Favorites .....	10
3.1.2 – Accessing ACD Activation Form in Favorites.....	10
<b>3.2 – How To Complete ACD Activation Form .....</b>	<b>10</b>
3.2.1 – Base Information Entry.....	11
3.2.2 – ACD Activation Form Summary.....	14
3.2.3 – Application Access Request .....	15
3.2.4 – Selecting Requested Application Access – ViewPoint LADWP.....	15
3.2.5 – ViewPoint LADWP .....	16
3.2.6 – Selecting Requested Application Access – ViewPoint DI.....	18
3.2.7 – ViewPoint DI.....	18
3.2.8 – Laptop/Tablet Request.....	20
3.2.9 – Submit .....	22
<b>3.3 – Post Successful ACD Activation Submittal.....</b>	<b>22</b>
3.3.1 – Submission Request Number .....	22
3.3.3 – Monitor for 1Password Email .....	23
3.3.4 – Communication to New Users.....	24
<b>3.4 – Action for Additional Users .....</b>	<b>25</b>
<b>4. Conclusion.....</b>	<b>25</b>

# 1. Introduction

---

## Welcome to Subcontractor Onboarding

Onboarding Subcontractors requires set up in ViewPoint v1 and ViewPoint DI, in addition to ordering equipment. This guide walks you step by step through the process of adding a new subcontractor to each platform, as well as requesting the appropriate user access and equipment. The goal is to streamline the onboarding and ensure everything is set up correctly from the start.

## 2. Organization Registration

---

To work on the program, subcontractors are required to have their organization registered within ViewPoint v1 and ViewPoint DI. This registration must be completed prior to the commencement of any work and ensures that all participating organizations are properly authorized and accounted for within the system. Subcontractors will not be permitted to engage in program activities until the registration process has been successfully completed.

### 2.1 – Prepare Box Folder Structure for LADWP Subcontractor Registrations

Begin by setting up the box folder structure for storing all required onboarding documents.

#### 2.1.1 – Box Folder Structure Breakdown

1. **LADWP Subcontractor Registration and Onboarding:** Master folder for documentation related to LADWP.
  - a. Folder: Templates and Guides to be stored in Master, store:
    - i. LADWP Subcontractor Registration Form
    - ii. Contractor\_Okta\_JamfTrust\_Setup\_Guide
    - iii. ViewPoint LADWP Subcontractor Registration and Onboarding Guide
  - b. Folder: Subcontractor Name, store:
    - i. Completed LADWP Subcontractor Registration Form
    - ii. Executed Master Service Agreement (MSA)
    - iii. Executed Non-Disclosure Agreement (NDA)
    - iv. Current W-9
    - v. Certificate of Insurance (COI)
    - vi. All other applicable Insurances (Commercial Auto, General Liability, Professional Liability, Workers Compensation, Other)
    - vii. All Firm Type Tracking Certifications
    - viii. All applicable Licenses (Building, HVAC, Electrical, Plumbing)

## 2.2 – Complete LADWP Subcontractor Registration PDF Form

To add a new Organization to ViewPoint v1, please complete the LADWP Subcontractor Registration Form. The form can be accessed here: <https://willdan.box.com/s/n1vnx4n37mosw0jfzrtx4u444zqga48b>

**Important Note: Once the form is complete, save it with a unique file name in an easily accessible location.**

### 2.2.1 – Subcontractor Details

1. **Requester:** enter the name of the individual making the request.
2. **Company Information:**
  - a. Required:
    - i. CostPoint Vendor ID
    - ii. Company Name
    - iii. Company Phone
    - iv. Street Address 1
    - v. City
    - vi. State
    - vii. Zip code
  - b. Optional Billing Information (if applicable):
    - i. DBA (Doing Business As)
    - ii. Billing Address 1 (*if different from Street Address*)
    - iii. Billing Address 2
    - iv. City
    - v. State
    - vi. Zip code
  - c. Optional Shipping Information (if applicable):
    - i. Shipping Address 1 (*Address that will appear on the MPO, where materials are shipped*)
    - ii. Shipping Address 2
    - iii. City
    - iv. State
    - v. Zip code
3. **Contact Information** (enter the main point of contact for the Company):
  - a. Required:
    - i. Contact First Name
    - ii. Contact Last Name
    - iii. Contact Phone
    - iv. Contact Title
    - v. Contact Email

4. **Additional Information:**

a. Required:

i. Material Supply Option(s): Multi selection, please select all that apply.

- Consignment
- Direct Shipped
- Self-Supply
- Willdan Delivery/Pickup
- Not Applicable/TBD

ii. Work Type(s): Multi selection, please select all that apply

- Perform Audits
- Perform Installations

LADWP Subcontractor Registration Form


Please complete the form below and save the file in an easily accessible location using the following naming convention: *Subcontractor Name - Date - Registration Form*. Fields marked with (\*) are required. Once completed, you will need to upload this form as part of the Subcontractor Registration process. If you need assistance, please contact [WES-Technology-Operations@willdan.com](mailto:WES-Technology-Operations@willdan.com).

Registration Form Submitted By:\*

**Company Information**

CostPoint Vendor ID:\*

<p>Company Name: * (Enter exactly as it appears on W-9.)</p> <div style="background-color: #add8e6; height: 20px; width: 100%;"></div>	<p>Street Address 1:*</p> <div style="background-color: #add8e6; height: 20px; width: 100%;"></div>						
<p>DBA: ("Doing Business As", if applicable.)</p> <div style="background-color: #add8e6; height: 20px; width: 100%;"></div>	<p>Street Address 2</p> <div style="background-color: #add8e6; height: 20px; width: 100%;"></div>						
<p>Company Phone:*</p> <div style="background-color: #add8e6; height: 20px; width: 100%;"></div>	<table border="0" style="width: 100%; border-collapse: collapse;"> <tr> <td style="width: 33%;">City:*</td> <td style="width: 33%;">State:*</td> <td style="width: 33%;">Zipcode:*</td> </tr> <tr> <td><div style="background-color: #add8e6; height: 20px; width: 100%;"></div></td> <td><div style="background-color: #add8e6; height: 20px; width: 100%;"></div></td> <td><div style="background-color: #add8e6; height: 20px; width: 100%;"></div></td> </tr> </table>	City:*	State:*	Zipcode:*	<div style="background-color: #add8e6; height: 20px; width: 100%;"></div>	<div style="background-color: #add8e6; height: 20px; width: 100%;"></div>	<div style="background-color: #add8e6; height: 20px; width: 100%;"></div>
City:*	State:*	Zipcode:*					
<div style="background-color: #add8e6; height: 20px; width: 100%;"></div>	<div style="background-color: #add8e6; height: 20px; width: 100%;"></div>	<div style="background-color: #add8e6; height: 20px; width: 100%;"></div>					

<p><b>Billing Information</b> <i>(If different from Street Address.)</i></p> <p>Billing Address 1</p> <div style="background-color: #add8e6; height: 20px; width: 100%;"></div> <p>Billing Address 2</p> <div style="background-color: #add8e6; height: 20px; width: 100%;"></div> <table border="0" style="width: 100%; border-collapse: collapse;"> <tr> <td style="width: 33%;">City</td> <td style="width: 33%;">State</td> <td style="width: 33%;">Zipcode</td> </tr> <tr> <td><div style="background-color: #add8e6; height: 20px; width: 100%;"></div></td> <td><div style="background-color: #add8e6; height: 20px; width: 100%;"></div></td> <td><div style="background-color: #add8e6; height: 20px; width: 100%;"></div></td> </tr> </table>	City	State	Zipcode	<div style="background-color: #add8e6; height: 20px; width: 100%;"></div>	<div style="background-color: #add8e6; height: 20px; width: 100%;"></div>	<div style="background-color: #add8e6; height: 20px; width: 100%;"></div>	<p><b>Shipping Information</b> <i>(Address that will appear on the MPO, where materials are shipped.)</i></p> <p>Shipping Address 1</p> <div style="background-color: #add8e6; height: 20px; width: 100%;"></div> <p>Shipping Address 2</p> <div style="background-color: #add8e6; height: 20px; width: 100%;"></div> <table border="0" style="width: 100%; border-collapse: collapse;"> <tr> <td style="width: 33%;">City</td> <td style="width: 33%;">State</td> <td style="width: 33%;">Zipcode</td> </tr> <tr> <td><div style="background-color: #add8e6; height: 20px; width: 100%;"></div></td> <td><div style="background-color: #add8e6; height: 20px; width: 100%;"></div></td> <td><div style="background-color: #add8e6; height: 20px; width: 100%;"></div></td> </tr> </table>	City	State	Zipcode	<div style="background-color: #add8e6; height: 20px; width: 100%;"></div>	<div style="background-color: #add8e6; height: 20px; width: 100%;"></div>	<div style="background-color: #add8e6; height: 20px; width: 100%;"></div>
City	State	Zipcode											
<div style="background-color: #add8e6; height: 20px; width: 100%;"></div>	<div style="background-color: #add8e6; height: 20px; width: 100%;"></div>	<div style="background-color: #add8e6; height: 20px; width: 100%;"></div>											
City	State	Zipcode											
<div style="background-color: #add8e6; height: 20px; width: 100%;"></div>	<div style="background-color: #add8e6; height: 20px; width: 100%;"></div>	<div style="background-color: #add8e6; height: 20px; width: 100%;"></div>											

**Contact Information**


Contact First Name:*	Contact Last Name:*	Contact Phone:*
<div style="background-color: #add8e6; height: 20px; width: 100%;"></div>	<div style="background-color: #add8e6; height: 20px; width: 100%;"></div>	<div style="background-color: #add8e6; height: 20px; width: 100%;"></div>
Contact Title:*	Contact Email:*	
<div style="background-color: #add8e6; height: 20px; width: 100%;"></div>	<div style="background-color: #add8e6; height: 20px; width: 100%;"></div>	

Figure 1 – Organization Registration – LADWP Subcontractor Registration Form – Page 1

## 2.2.2 – Documentation

1. **Insurance:**
  - a. **Required:**
    - i. Certificate of Insurance (COI)
      - List insurance types covered by COI in text box
    - ii. Commercial Auto
    - iii. General Liability
    - iv. Professional Liability
    - v. Workers' Compensation
  - b. Optional:
    - i. Other
2. **Current Certifications (Firm Type Tracking):** Multi selection, please select all that apply.
  - a. Optional:
    - i. Disabled Veteran Business Enterprise
    - ii. Disadvantaged Business Enterprise
    - iii. Economically Disadvantaged Women-Owned SB
    - iv. Emerging Business Enterprise
    - v. LGBT Owned Business
    - vi. Local Small Business Enterprise
    - vii. Local Small Business/Small Local Business
    - viii. Micro-Business
    - ix. Minority-Owned Business Enterprise
    - x. SBA 8(a) Business Development Program
    - xi. Service-Disabled Veteran-Owned Small Business
    - xii. Small Business
    - xiii. Small Business Enterprise LA
    - xiv. Small Business Enterprise Metro
    - xv. Small Business Enterprise Proprietary
    - xvi. Small Minority Business Enterprise
    - xvii. Small Women Business Enterprise
    - xviii. Women-Owned Business Enterprise
    - xix. Women-Owned Small Business
3. **Current Licenses (Required):** Multi selection, please select all that apply.
  - a. Building
  - b. Electrical
  - c. HVAC
  - d. Plumbing

4. **Onboarding (Required):**
  - a. Executed Master Subcontractor Agreement (MSA)
  - b. Executed Non-Disclosure Agreement (NDA)
  - c. Current W-9

LADWP Subcontractor Registration Form


**Additional Information**

Material Supply Option(s):\* *Please select all that apply.*

Consignment   
  Direct Shipped   
  Self-Supply   
  Willdan Delivery/ Pickup  
 Not Applicable/TBD

Work Type(s):\* *Please select all that apply.*

Perform Audits   
  Perform Installations

**Documentation**

The following documentation requests are marked with (\*) are required. Please make sure you have gathered the appropriate documentation below prior to clicking "Upload Required Documentation."

**Insurance:**\* *Please select all that apply. Note: Some COIs cover multiple types, if this is the case, only select COI and provide additional information in the space provided.*

COI (Certificate of Insurance)  
*Please list insurance types covered by the COI below.*

Commercial Auto   
  Other (Please explain.)  
 General Liability   
   
 Professional Liability  
 Workers Compensation

**Current Certifications (Firm Type Tracking):** *Please select all that apply.*

<input type="checkbox"/> Disabled Veteran Business Enterprise	<input type="checkbox"/> Service-Disabled Veteran-Owned Small Business
<input type="checkbox"/> Disadvantaged Business Enterprise	<input type="checkbox"/> Small Business
<input type="checkbox"/> Economically Disadvantaged Women-Owned SB	<input type="checkbox"/> Small Business Enterprise LA
<input type="checkbox"/> Emerging Business Enterprise	<input type="checkbox"/> Small Business Enterprise Metro
<input type="checkbox"/> LGBT Owned Business Enterprise	<input type="checkbox"/> Small Business Enterprise Proprietary
<input type="checkbox"/> Local Small Business Enterprise	<input type="checkbox"/> Small Business-Public Works
<input type="checkbox"/> Local Small Business/Small Local Business	<input type="checkbox"/> Small Minority Business Enterprise
<input type="checkbox"/> Micro-Business	<input type="checkbox"/> Small Women Business Enterprise
<input type="checkbox"/> Minority-Owned Business Enterprise	<input type="checkbox"/> Woman-Owned Business Enterprise
<input type="checkbox"/> SBA 8(a) Business Development Program	<input type="checkbox"/> Woman-Owned Small Business

**Current License(s):**\* *Please select all that apply.*

Building   
  Electrical  
 HVAC   
  Plumbing

**Onboarding:**\* *Please upload the following documentation.*

Executed Master Subcontractor Agreement (MSA)  
 Executed Non-Disclosure Agreement (NDA)  
 Current W-9

Upload Required Documentation

Figure 2 – Organization Registration – LADWP Subcontractor Registration Form – Page 2

### 2.2.3 – Submit Documents

After all required documentation has been gathered, click “Upload Required Documentation”. You will be redirected to the upload page.

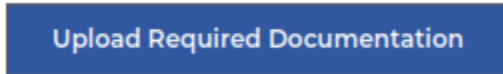
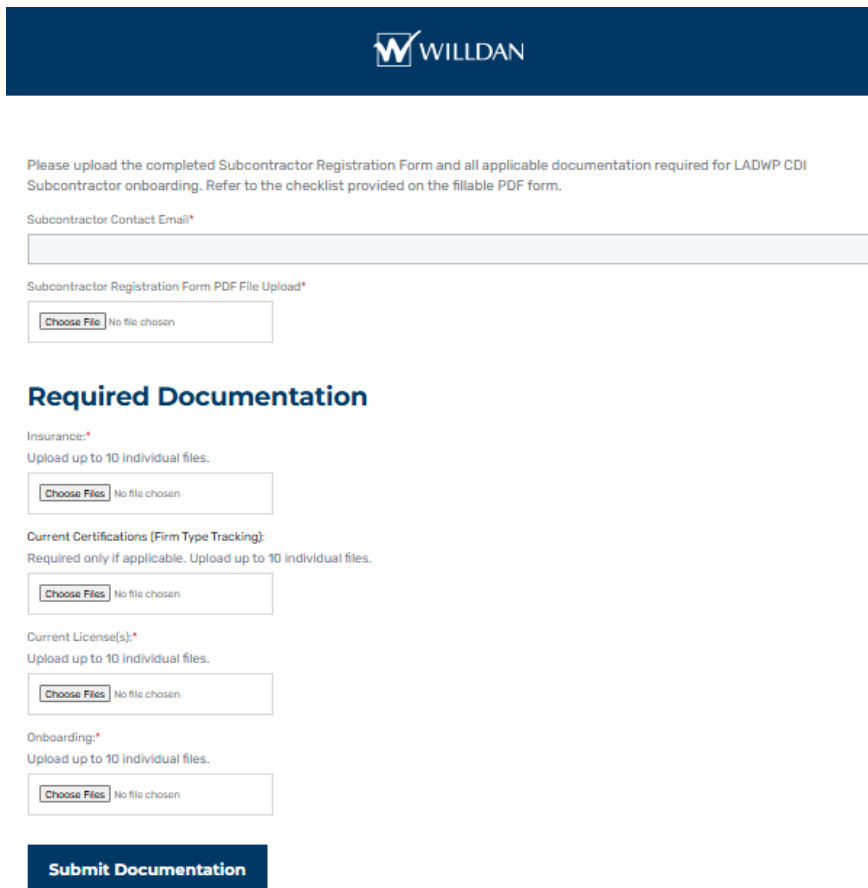


Figure 3 – Organization Registration – Submit Documents

1. Enter the Subcontractor email (this is the same email for the contact noted on the form).
2. Upload all documents noted on the form to the respective area.
  - a. Completed LADWP Subcontractor Registration Form
  - b. Insurance(s)
  - c. Current Certifications (Firm Type Tracking)
  - d. Current License(s)
  - e. Onboarding documents
3. Click “Submit Documentation”



Please upload the completed Subcontractor Registration Form and all applicable documentation required for LADWP CDI Subcontractor onboarding. Refer to the checklist provided on the fillable PDF form.

Subcontractor Contact Email\*

Subcontractor Registration Form PDF File Upload\*

**Required Documentation**

Insurance:\*  
Upload up to 10 individual files.

Current Certifications (Firm Type Tracking):  
Required only if applicable. Upload up to 10 individual files.

Current License(s):\*  
Upload up to 10 individual files.

Onboarding:\*  
Upload up to 10 individual files.

**Submit Documentation**

Figure 4 – Organization Registration – Submit Documents

## 2.3 – Post LADWP Subcontractor Registration PDF Form Submittal

Please note the following important information after submitting the LADWP Subcontractor Registration PDF form:

- Clicking **Submit** creates a HelpDesk ticket for organization setup.
- If a document was missed, email it to **wes-technology-operations@willdan.com** (do not resubmit the form). Resubmitting the form creates a separate, unrelated HelpDesk ticket.
- Wait for confirmation from Technology Operations that the Subcontractor Organization is set up in ViewPoint v1 before moving to the next phase.

# 3. Onboarding Users

User onboarding is required for both ViewPoint v1 and ViewPoint DI. This section outlines the required onboarding procedures and provides detailed instructions for completing the process for each platform.

## 3.1 – Locating ACD Activation Form

The ACD Activation Form is accessed in ServiceNow by entering **“ACD Activation Form”** in the **How can we help?** search bar **(1)**. If a drop-down menu displaying previous searches appears, select the **ACD Activation Form** directly from the menu **(2)** to open it.

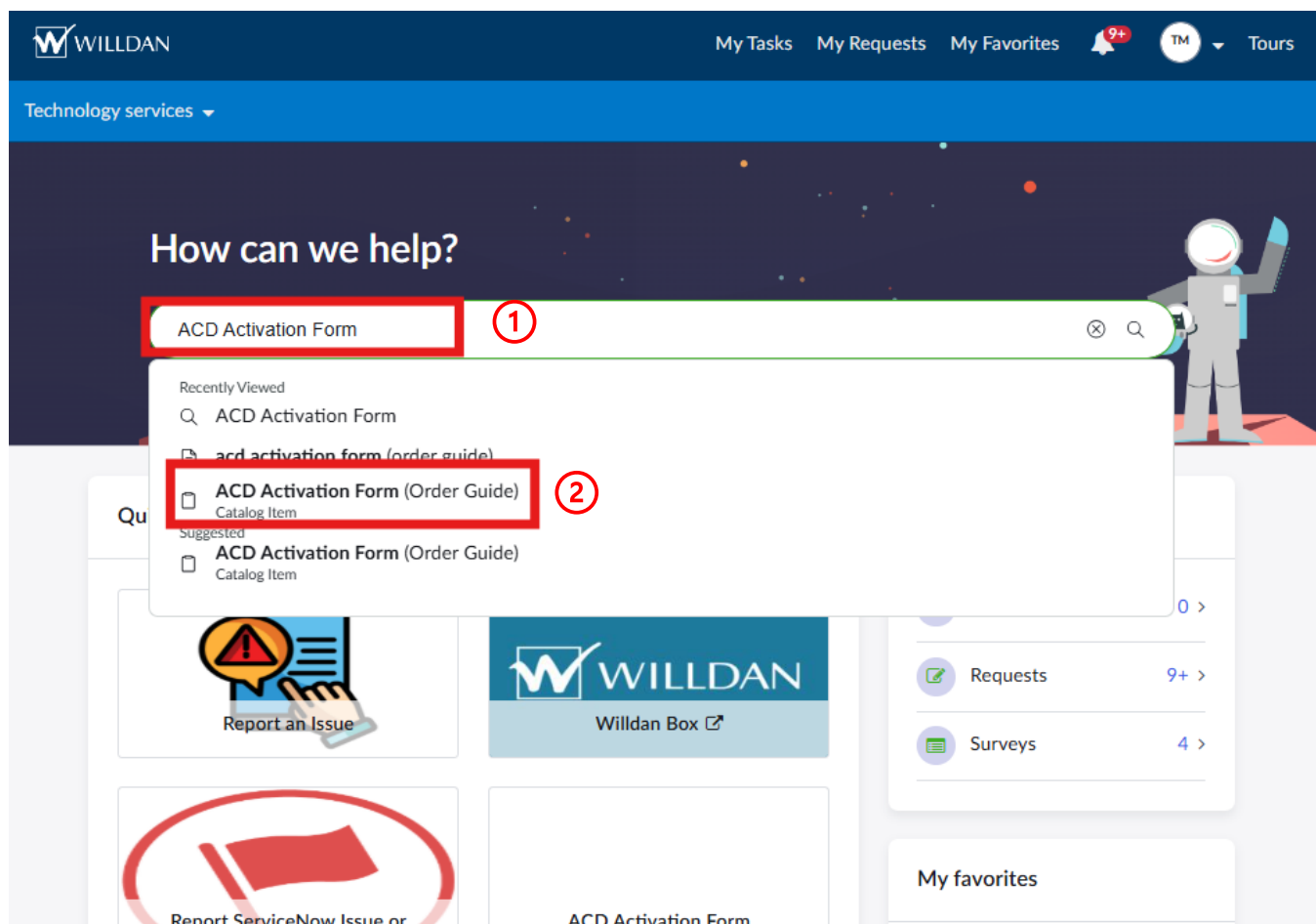


Figure 5 – Locating ACD Activation Form – Search

### 3.1.1 – Adding ACD Activation Form to Favorites

When the ACD Activation Form (Order Guide) opens, it may be saved to your Favorites for future reference. To do so, select the heart icon in the upper-right corner; the icon will turn green, indicating that the form has been successfully added to your Favorites.



Figure 6 – Locating ACD Activation Form – Adding to your favorites

### 3.1.2 – Accessing ACD Activation Form in Favorites

To access the ACD Activation Form from your Favorites, select **Favorites (1)** and then choose the **ACD Activation Form (2)** from the list.

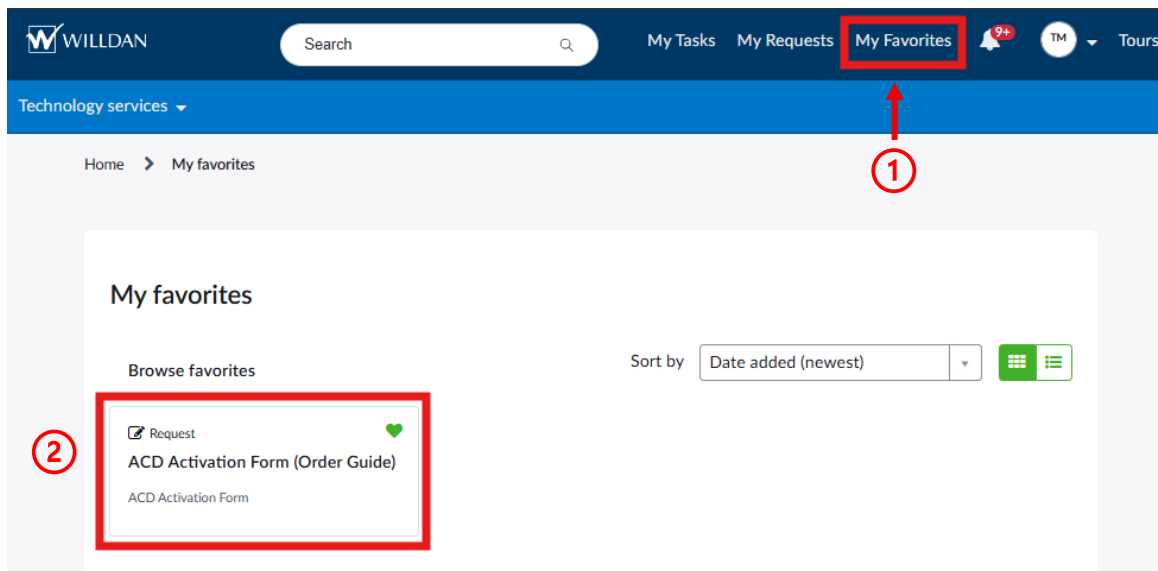


Figure 7 – Locating ACD Activation Form – Accessing ACD Activation Form in Favorites

## 3.2 – How To Complete ACD Activation Form

Completing the ACD Activation form in its entirety is required to ensure the accurate setup of user access. This section provides detailed guidance on each component of the form, including the entry of base information, submission of application access requests, selection of requested application access levels, and completion of all required fields for both ViewPoint v1 and ViewPoint DI. The process concludes with the proper submission of the ACD Activation form.

### 3.2.1 – Base Information Entry

Begin by entering the required base information related to the request. Each field must be completed accurately to ensure proper processing and timely user setup.

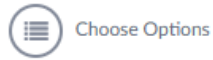
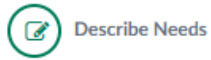
1. **CC**
  - Enter the name of any person(s) that should be copied on the request.
2. **Requester**
  - Enter the name of the individual submitting the request.
3. **Department of Requester**
  - This field is auto-populated with the requester's department.
4. **User to be receiving**
  - Enter the legal name of new user
5. **Organization ID of receiver**
  - Select the department in which the user will be working from the drop-down menu.
    - Note: LADWP is WW.2A.20
6. **Preferred Name**
  - Enter the user's preferred name, if applicable.
7. **Phone Number**
  - Enter user's phone number.
8. **Job Title**
  - Enter Contractor. (this field must always be noted as Contractor).
9. **Supervisor**
  - Select the individual to whom the Contractor will report to from the drop-down menu.
10. **Office**
  - For LADWP, select Los Angeles
11. **Name of Existing Employee Whose Permissions Will Be Copied**
  - Select a current contractor whose access permissions should be mirrored.
12. **Start Date**
  - Enter the date the Contractor will begin working on the program.
13. **Hire Type**
  - Select "New Hire" from the drop-down menu.
14. **Employment Type**
  - Always select "Temp through Agency" from the drop-down menu.
15. **Contract End Date**
  - Enter the date the Contractor will cease providing services.
16. **Employment Class**
  - Select "Full Time".
17. **Individual Designated to Receive the New Hire's Initial Onboarding Credentials**
  - Enter the name of the individual responsible for the onboarding of the Contractor.
18. **Access needed for user**
  - Select "Application Access Request" from the drop-down menu.
  - Select "Laptop/Tablet Request"

Refer to the images below for an illustration of how this information appears within the ACD Activation Form.

## ACD Activation Form (Order Guide)



ACD Activation Form



Submit this form if a new or re-hire needs a Willdan account, hardware and application accesses.

### User Information

CC

\*Requester

Department of Requester

\*User to be receiving

\*Organization ID of receiver

\*Preferred Name

\*Telephone number

\*Job Title

\*Supervisor

Figure 8 – How to Complete ACD Activation Form – Base Information, Describe Needs – Image A

\*Office  
Willdan - Los Angeles

\*Name of an Existing Employees Permissions to Copy ?  
Name of an Existing Employees Permissions to Copy (Exclude Costpoint, Integrify, Viewpoint, DI, Permission Groups).  
The requested user should not have permissions copied from a manager or anyone with elevated permissions. ✕

i Chris Lowery ✕

\*Start Date  
02/17/2026 11:58:20

\*Hire Type  
New Hire

\*Employment Type  
Temp through agency

\*Contract end date  
12/31/2026 11:58:35

\*Employment Class  
Full-time

\*Who should receive the new hire's initial credentials for onboarding purposes?  
✕ Sharon Gill

Access needed for user ?  
Please select multiple if applicable. ✕

✕ Application Access request ✕ Laptop/Tablet Request

Next

Figure 9 – How to Complete ACD Activation Form – Base Information, Describe Needs – Image B

Verify that all information is complete and accurate before proceeding. To continue, click next.

### 3.2.2 – ACD Activation Form Summary

Once **Next** is selected, the subsequent screen will appear.

#### ACD Activation Form (Order Guide) ♥

ACD Activation Form

---

✍️  
 Describe Needs

☰  
 Choose Options

✓  
 Summary

**Included Items:** \* Mandatory Fields

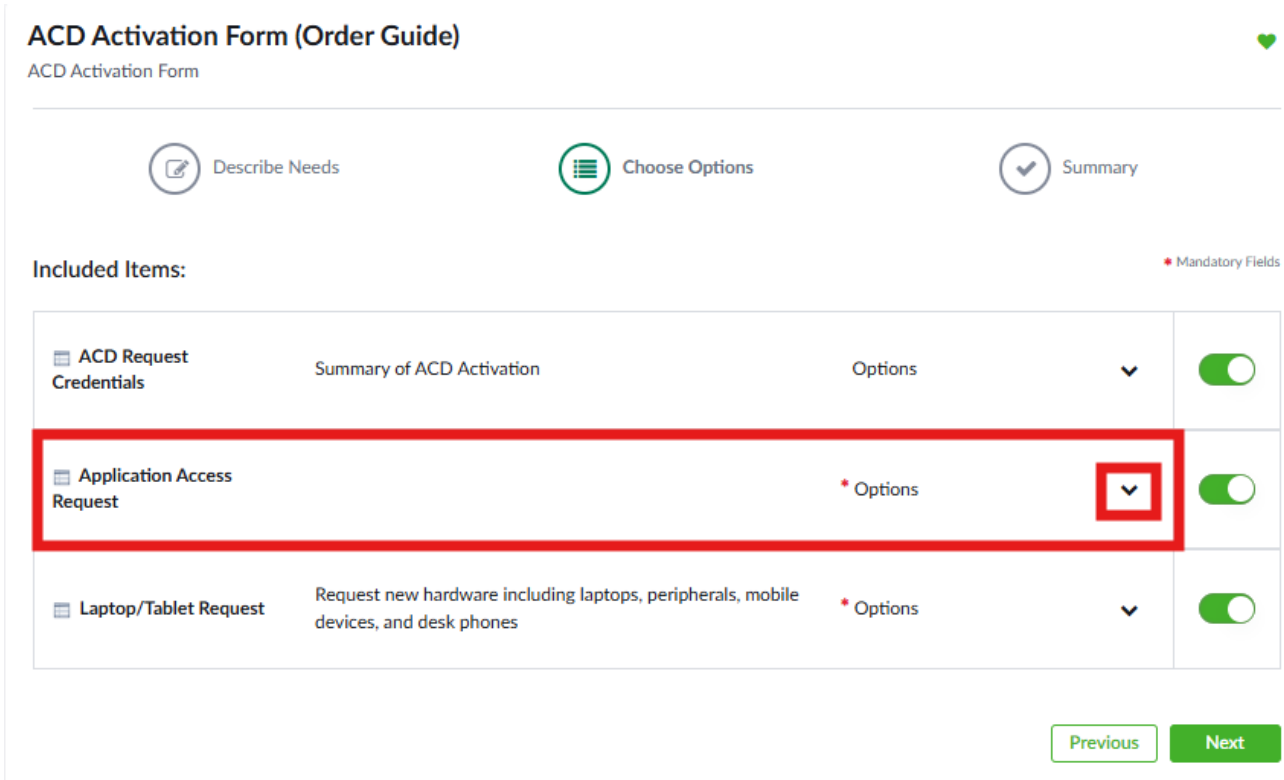
<span style="font-size: small;">☰</span> ACD Request Credentials	Summary of ACD Activation	Options <span style="float: right;">▼</span>	<input checked="" type="checkbox"/>
<span style="font-size: small;">☰</span> Application Access Request		* Options <span style="float: right;">▼</span>	<input checked="" type="checkbox"/>
<span style="font-size: small;">☰</span> Laptop/Tablet Request	Request new hardware including laptops, peripherals, mobile devices, and desk phones	* Options <span style="float: right;">▼</span>	<input checked="" type="checkbox"/>

Previous
Next

Figure 10 – How to Complete ACD Activation Form – ACD Activation Form Summary

### 3.2.3 – Application Access Request

Locate **Application Access Request**, then select the down arrow to expand the section and display the available fields



**ACD Activation Form (Order Guide)** ♥

ACD Activation Form

Describe Needs    Choose Options    Summary

**Included Items:** \* Mandatory Fields

ACD Request Credentials	Summary of ACD Activation	Options	▼	<input checked="" type="checkbox"/>
Application Access Request		* Options	▼	<input checked="" type="checkbox"/>
Laptop/Tablet Request	Request new hardware including laptops, peripherals, mobile devices, and desk phones	* Options	▼	<input checked="" type="checkbox"/>

Previous    Next

Figure 11 – How to Complete ACD Activation Form – Application Access Request

### 3.2.4 – Selecting Requested Application Access – ViewPoint LADWP

Enter the **Start Date** at the top of the form. Then, scroll to the bottom of the page to Requested Application Access and select **ViewPoint LADWP** to reveal the required fields.

\* Requested Application Access

x Viewpoint (LADWP)

Figure 12 – How to Complete ACD Activation Form – Selecting Requested Application Access – ViewPoint (LADWP)

### 3.2.5 – ViewPoint LADWP

Complete all required fields under **ViewPoint LADWP**. All mandatory fields must be accurately populated to ensure correct system access.

#### 1. **VP User Full Name**

- Enter the user's full name. This may be either the legal first name or preferred first name, followed by the last name.

#### 2. **VP Role**

- Select all applicable roles the user should be assigned. Available roles include:
  - **CCSR** (Customer Service Representative)
  - **AUD** (Auditor)
  - **INST** (Installer)

#### 3. **VP User Email**

- Enter the user's email address.
  - Note: This email address will be used by the user to login.

#### 4. **VP Organization**

- Enter the name of the Contractor.

#### 5. **Tech Classification**

- Enter the appropriate classification from the list below:
  - Journeyman
  - Apprentice Period 1, 1st Year
  - Apprentice Period 2, 1st Year
  - Apprentice Period 3, 2nd Year
  - Apprentice Period 4, 2nd Year
  - Apprentice Period 5, 3rd Year
  - Apprentice Period 6, 3rd Year
  - Apprentice Period 7, 4th Year
  - Apprentice Period 8, 4th Year
  - Apprentice Period 9, 5th Year
  - Apprentice Period 10, 5th Year
  - Admin I
  - Admin II
  - Admin III
  - Foreman
  - General Foreman

#### 6. **Phone Number**

- Enter the user's phone number.

#### 7. **Comments** (Optional)

- Use this field to provide any additional relevant information.

Review all entries for accuracy and completeness prior to proceeding to the next section of the form.

Refer to the images below for an illustration of how this information appears within the Application Access Request Form.

\*Requested Application Access

\*VP User Full name

\*VP Role

\*VP User Email

\*VP Organization

\*Tech Classification

\*Phone Number

Comments


 Add attachments

Figure 13 – How to Complete ACD Activation Form – ViewPoint LADWP

### 3.2.6 – Selecting Requested Application Access – ViewPoint DI

Return to the Requested Application Access field and add **ViewPoint DI** for the required fields to appear.

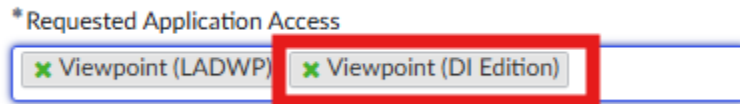


Figure 14 – How to Complete ACD Activation Form – Selecting Requested Application Access – ViewPoint DI

### 3.2.7 – ViewPoint DI

Complete all required fields under **ViewPoint DI**. All mandatory fields must be accurately populated to ensure correct system access.

#### 1. Select the DI Application

- Photo Capture
- Prospector
- ViewPoint Web

#### 2. Select DI Role

- Select applicable role from the drop-down menu, the user should be assigned. Roles listed in drop-down are below. **NOTE:** Roles in **RED** should NOT be chosen. Currently the only role needed for use of Photo Capture is “Implementer (Trade Ally/SME)”.

- Auditor
- Auditor Team Lead
- Client Access
- Construction Manager
- Customer Service Rep
- Engineering Admin
- Finance
- Herzog
- **Implementer (Trade Ally/SME)**
- Lead Generator
- On Target
- Program Admin Manager
- Program Administrator
- Program Manager
- Service Tech Manager
- Service Technician
- System Administrator

#### 3. Select DI Environment

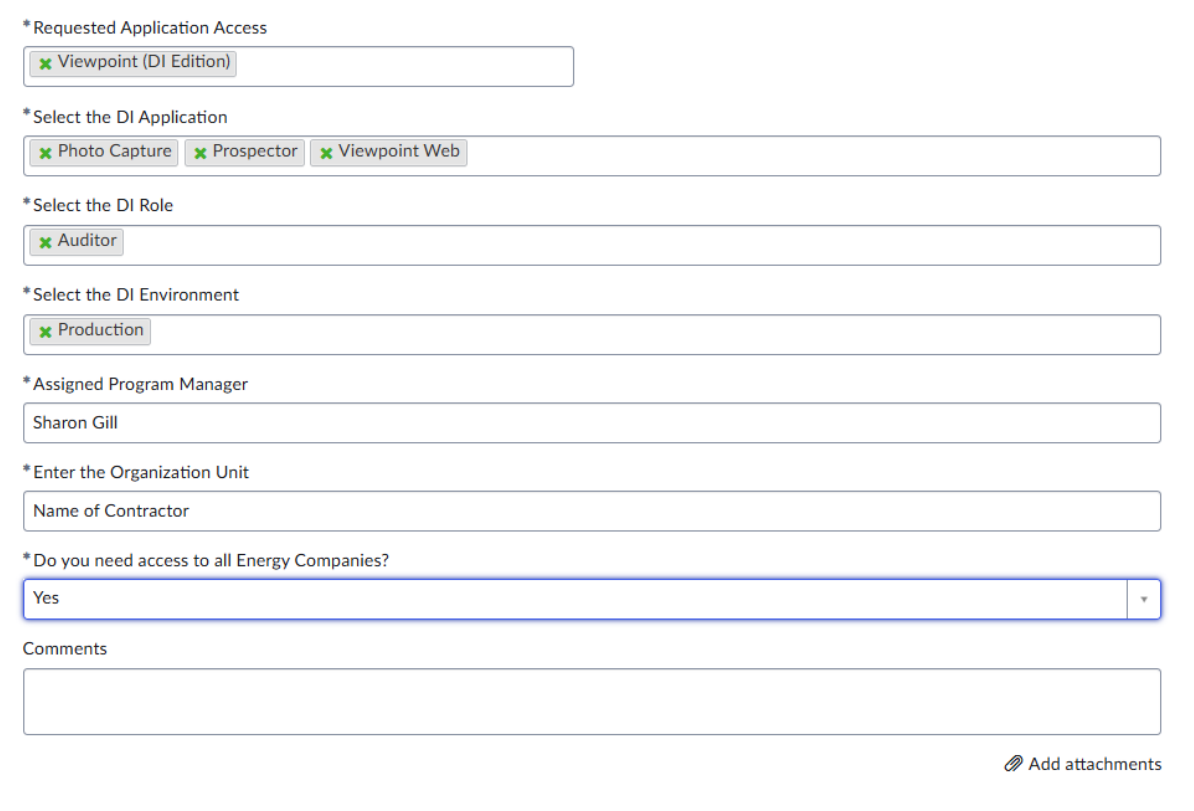
- Select “Production” from the drop-down menu.

#### 4. Assigned Program Manager

- Enter name of the Program Manager.
- 5. **Enter Organization Unit**
  - Enter the Name of the Contractor.
- 6. **Do you need access to all Energy Companies?**
  - Select "Yes" from the drop-down menu.
- 7. **Comments** (Optional)
  - Use this field to provide any additional relevant information.

Verify that all information is complete and accurate before proceeding. To continue, click next.

Refer to the images below for an illustration of how this information appears within the Application Access Request Form.



\*Requested Application Access  
Viewpoint (DI Edition)

\*Select the DI Application  
Photo Capture Prospector Viewpoint Web

\*Select the DI Role  
Auditor

\*Select the DI Environment  
Production

\*Assigned Program Manager  
Sharon Gill

\*Enter the Organization Unit  
Name of Contractor

\*Do you need access to all Energy Companies?  
Yes

Comments

[Add attachments](#)

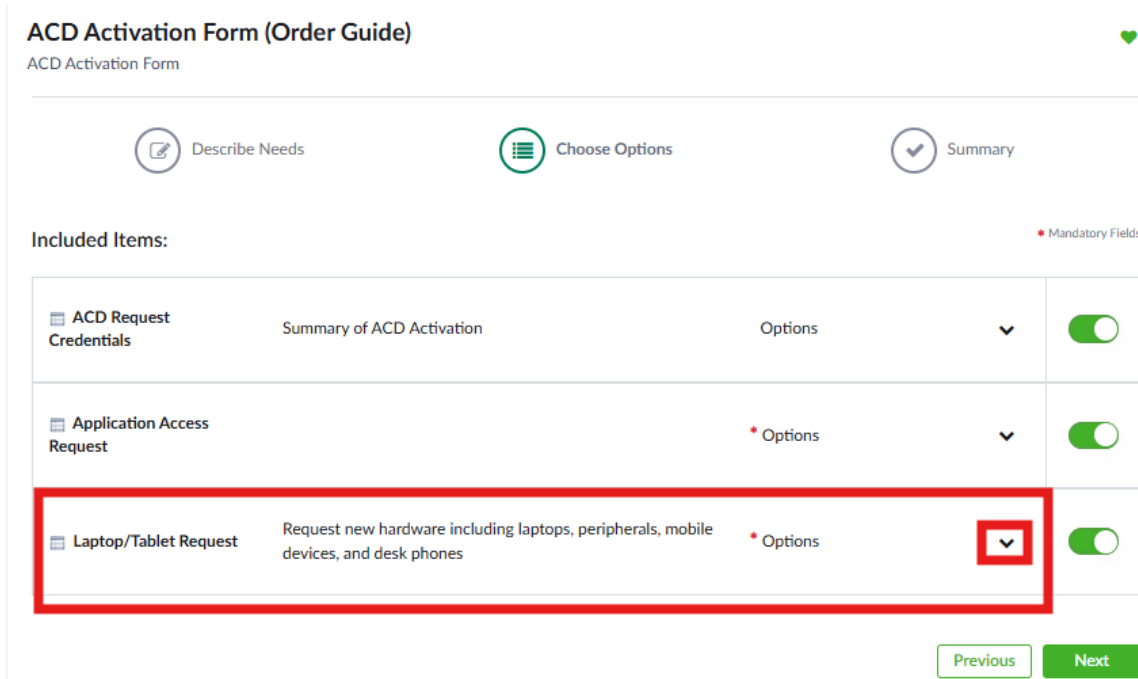
Previous

Next

Figure 15 – How to Complete ACD Activation Form – ViewPoint DI

### 3.2.8 – Laptop/Tablet Request

Locate **Laptop/Tablet Request**, then select the down arrow to expand the section and display the available fields



**ACD Activation Form (Order Guide)**

ACD Activation Form

Describe Needs    Choose Options    Summary

Included Items: \* Mandatory Fields

<input type="checkbox"/> ACD Request Credentials	Summary of ACD Activation	Options	▼	<input checked="" type="checkbox"/>
<input type="checkbox"/> Application Access Request		* Options	▼	<input checked="" type="checkbox"/>
<input type="checkbox"/> Laptop/Tablet Request	Request new hardware including laptops, peripherals, mobile devices, and desk phones	* Options	▼	<input checked="" type="checkbox"/>

Previous    Next

Figure 16 – How to Complete ACD Activation Form – Laptop/Tablet Request

Complete all required fields under **Laptop/Tablet Request**. All mandatory fields must be accurately populated to ensure correct system access.

- 1. Will this new hire utilize a Willdan Laptop?**
  - Select "Yes – Prepare/Ship a Willdan Laptop"
- 2. Computer Type**
  - Select "iPad"
- 3. Requested Peripherals (Select ALL That Apply)**
  - Select iPad Case
- 4. iPad Accessories**
  - Select iPad Case
- 5. Shipping address**
  - Enter complete address the iPad will be shipped to
- 6. Phone number of recipient**
  - Enter phone number of person receiving equipment

## 7. Comments

- Enter any additional information related to the request

## 8. Date

- Enter date the equipment should be shipped

\*Will this new hire utilize a Willdan Laptop?

Yes - Prepare/Ship a Willdan Laptop

\*Computer Type

iPad

\*Requested Peripherals (Select ALL That Apply)

iPad Case

\*iPad Accessories

iPad Case

\*Shipping address

TEST ADDRESS STREET  
TEST CITY, TEST ZIP CODE

\*Phone number of recipient

555-555-5555

Comments

Please send requiring signature

Date

02/17/2026


 Add attachments

Figure 17 – How to Complete ACD Activation Form – Laptop/Tablet Request

### 3.2.9 – Submit

Once all required fields in the **Base Information** section are complete and **Next** is clicked, the **Summary** screen will appear. Review all information for accuracy, then click **Submit** to finalize the request.

**ACD Activation Form (Order Guide)** ♥

ACD Activation Form

---

Describe Needs

Choose Options

Summary

Order Guide Details	Quantity	Price (each)	Recurring (each)
ACD Request Credentials	1	---	---
Application Access Request	1	---	---
Laptop/Tablet Request	1	---	---

Total : \$0.00

Edit Options
Submit

Figure 18 – How to Complete ACD Activation Form – Submit

## 3.3 – Post Successful ACD Activation Submittal

This section outlines the steps required after the ACD Activation Form has been successfully submitted. It provides guidance on verification, documentation, coordination, and final confirmation to ensure the activation process is completed accurately and efficiently.

### 3.3.1 – Submission Request Number

Upon successful submission, a **Request Number** will be assigned. Retain this number to track the progress and status of the request.

Submitted: 02/17/2026 13:58:07

Request Number : REQ0011530

Estimated Delivery : --

---

Item	Delivery Date	Stage	Price (each)	Quantity	Total
Laptop/Tablet Request	--		---	--	---
Application Access Request	--		---	--	---
ACD Request Credentials	--	▶ Fulfillment	---	--	---

Total: \$0.00

Figure 19 – How to Complete ACD Activation Form – Request Number

### 3.3.2 – Monitor for Acceptable Use Policy Email

After the Request Number is created, be on the lookout for an automatic email with the subject line: **“Acceptable Use Policy for Independent Contractor or Temp.”** Follow the instructions provided in the email to ensure timely processing of the ACD Activation. Instructions are:

1. Download the Acceptable Use Policy
2. Email to User for review, acknowledgement and signature
3. Reply to this email with executed Acceptable Use Policy

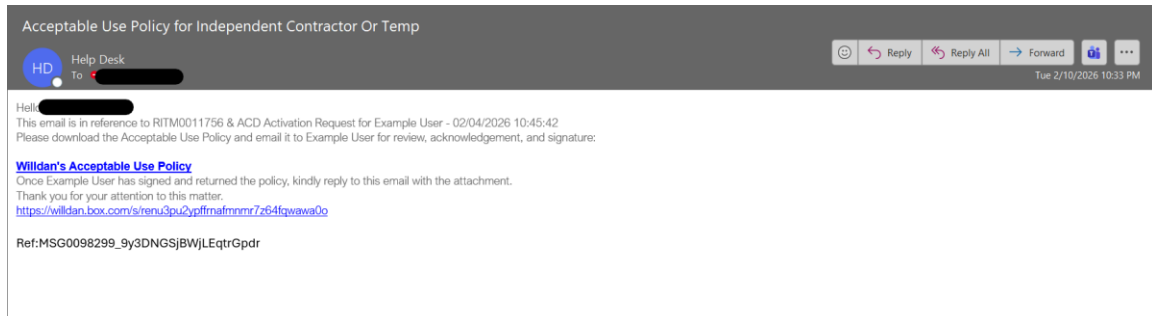


Figure 20 – How to Complete ACD Activation Form – Acceptable Use Policy automatic email.

### 3.3.3 – Monitor for 1Password Email

The requester will receive an email from 1Password with the Contractor’s Okta ID and temporary password. Follow the steps below upon receipt of the email:

1. Click the link
2. Enter your Willdan email
3. Enter six-digit verification code to reveal credentials
4. Copy credentials

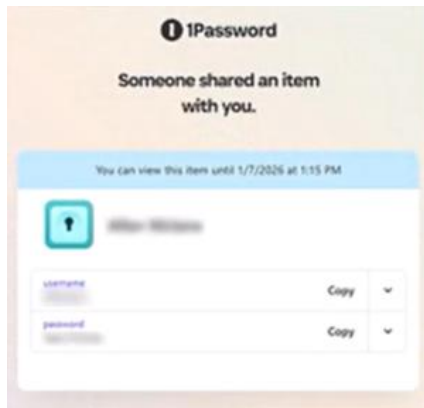


Figure 21 – How to Complete ACD Activation Form – Acceptable Use Policy automatic email.

### 3.3.4 – Communication to New Users

Clear communication with the new user is essential to prevent confusion or delays in their ability to begin work. This section outlines all critical information and required steps to ensure smooth and timely onboarding.

1. ViewPoint v1 Login Credentials
  - a. Users will receive an email from [no-reply@willdan.com](mailto:no-reply@willdan.com) with the subject line "ViewPoint Login Created."

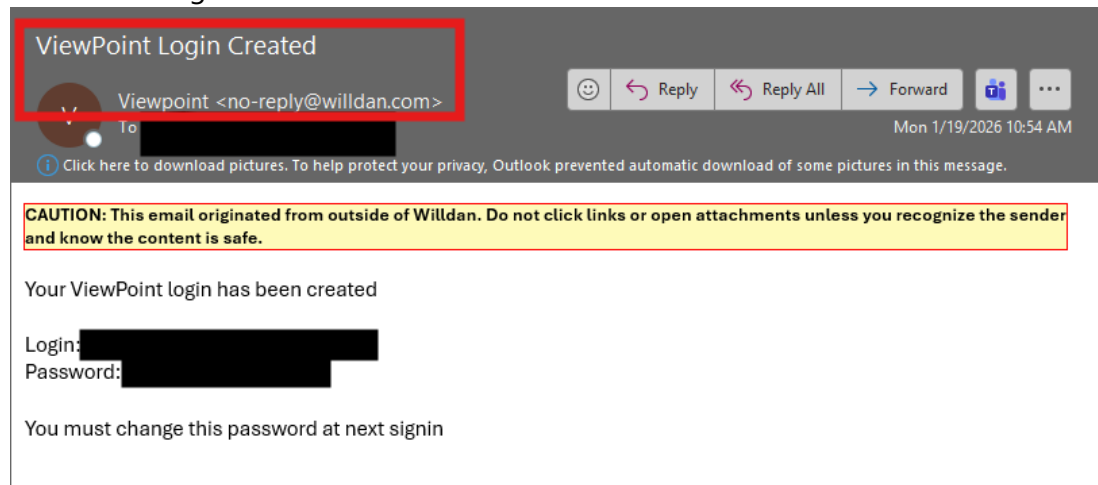


Figure 22 – How to Complete ACD Activation Form – Acceptable Use Policy automatic email.

2. ViewPoint DI Login Credentials
  - a. Provide Login Credentials copied from step [3.2.8](#).
  - b. Install Jamf Trust on devices – Note: *this app must be installed first for deployment of ViewPoint Photo Capture mobile app.*
    - i. Instruction Guide for Jamf Trust can be located here: <https://willdan.box.com/s/813njg5i8ymzozjw3pkalswbxqnxg71vu>
  - c. Set Up Okta
    - i. Sign in at <https://willdan.okta.com> to configure multi-factor authentication, security questions and change temporary password.
    - ii. Permanent password must be set up with 10 days of receiving temporary password.
    - iii. Note: *Passwords expire every 90 days. If password expires or is forgotten, use the "Need help signing in?" link on the Okta login page to reset or unlock account.*
3. Request Signature on Acceptable Use Policy
  - a. Provide downloaded Acceptable Use Policy from step [3.2.7](#).
4. Provide link to ViewPoint v1:
  - a. <https://ladwp-landing.viewpointwilldan.com>

## 3.4 – Action for Additional Users

Additional users require steps in sections, [3.1](#), [3.2](#) and [3.3](#) to be completed separately for each user account to ensure proper setup and access.

# 4. Conclusion

---

Our goal is to enhance your experience and streamline your workflow.

To contact Willdan support regarding the Subcontractor Onboarding Guide, send an email to:

[WES-Technology-Operations@willdan.com](mailto:WES-Technology-Operations@willdan.com)

### **Willdan Group, Inc.**

2401 East Katella Avenue, Suite 300 Anaheim, California United States 92806