



Quick Reference Card

Working with the Tasks Module

OVERVIEW

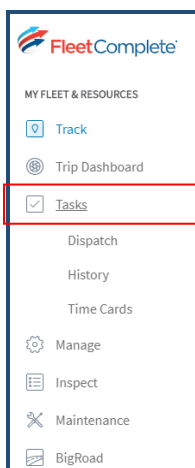
Tasks are activities that need to be performed at a specific location, assigned to a Resource, and then monitored in terms of their progress.

This Quick Reference Card discusses the workflows involved for an Administrator in the **Dispatch**, **History** and **Time Card** screens of the Task Module in the FC Web application.

ACCESS TASKS MODULE ON FC WEB

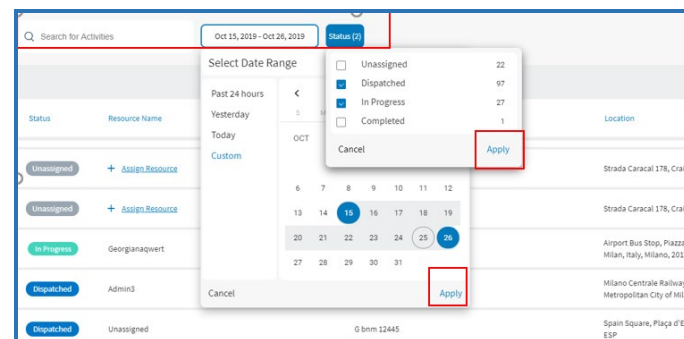
The Tasks Module provides the option to access the **Dispatch**, **History** and **Time Card** screens, as necessary.

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 **Tasks** menu item



The Dispatch screen displays all activities that currently have a status of **Unassigned**, **Dispatched**, **In Progress**, and **Completed**. This screen also allows Dispatchers to Create and Assign new Activities to Resources.

1. From the Main Menu Tasks section, click the **Dispatch** submenu item
2. To filter the list of Activities based on Activity Title and /or Location and/or Assigned Resources and/or Date and/or Status, follow the steps below:
 - a. Click the Magnifying glass on the top left-hand corner of the screen to search for Activities by their Title and/or Location and/or Resource Name
 - b. Alternatively, to filter Activities based on a certain **Date Range** or **Time Frame** click the **Date Range** option next to the Search field and from the pop-up Calendar menu, select any of the pre-configured time frames from the left-hand side of the calendar menu. For e.g.: Past 24Hours, Or
 - c. Click the **Custom** button and select the Start and End Dates on the Calendar to indicate the preferred time Frame.
 - d. Click the **Apply** button to apply the changes
 - e. Alternatively, to Filter the list of Activities based on their current Statuses, click the **Status** button
 - f. From the Status Dropdown menu, select one or multiple checkboxes next to the available statuses
 - g. Click the **Apply** button



Note: The number next to each status on the Status dropdown menu indicates the total number of existing Activities associated with that status.

THE DISPATCH SCREEN



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CREATE & ASSIGN A NEW ACTIVITY

The Dispatch screen also allows Dispatchers to Create and Assign new Activities to Resources.

1. Click the **+Create Activity** button on the top right-hand corner of the Dispatch screen
2. On the *New Activity* Screen, Type an **Activity Title**
3. In the **Activity Date Range** section, click the Date Range Tab and select a preferred Date for this task
4. In the Hours section, specify the Time for the Task
5. Click the Apply button

6. Enter all other information in the remaining fields, as necessary
7. The Assign Resource menu on the right-hand side of the screen lists all the available Resources along with the total number of **Current Tasks** assigned to each Resource
8. To assign a Resource to the Activity, click the Search magnifying glass and start typing a Resource name
9. From the list of suggested options based on the search criteria, select a preferred Resource name

10. Click the **Save** button to save and create the new Activity.

*Note: This new Activity will display a **Dispatched** status on the Dispatch Screen until it has been further updated by the Resource(s) from the Task Tracker Mobile App.*

MANAGE ACTIVITIES: EDIT OR CANCEL TASKS

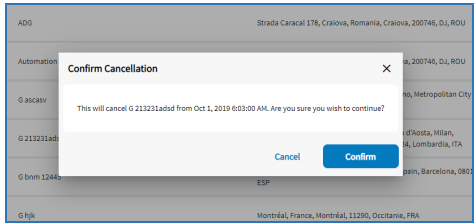
The Activities listed on the Dispatch screen provides the following information: Status, Resource Name, if already assigned, Activity Title, Location of the Task, Start and End Times of the Task, and Action to Edit or Cancel the Activity.

1. To Cancel an Activity, click the three-dot Ellipses button from the Actions column next to an Activity
2. Click the **Cancel Activity** button

3. On the Confirm Cancellation pop up window, select **Confirm** to confirm the cancellation



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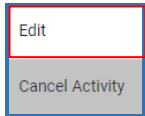


- Alternatively, to Edit an activity, click the three-dot Ellipses button from the Actions column next to an



Activity

- click the **Edit** button



- Edit all the fields on the Edit Activity screen, as necessary
- Click the **Save** button

Note: The Edit Activity Screen now has a **Status History** section that provides detailed breakdown of the Task's progress, which includes the following information:

- The Current Activity Status
- The Progress flow the Task For e.g. Dispatched > In progress > completed
- The Location of the Resource during a status change

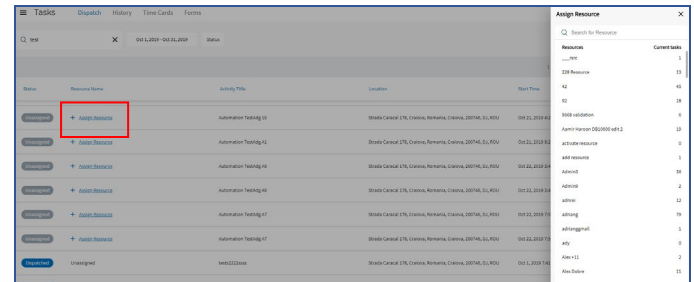
If the application cannot find the location, it will display N/A in the location section

- The Date & Time when a new status was assigned, and
- The Name of the User/resource that changed each status.

MANAGE ACTIVITIES: ASSIGN A RESOURCE

Only for **Unassigned** Activities, where a Resource has not been assigned, the **+ Assign Resource** button displays in the Resource Name column of the **Dispatch** screen.

- To Assign a Resource to an Unassigned activity, click the **+ Assign Resource** button



- Once selected, an **Assign Resource** menu displays on the Right hand side of the screen,
- This menu lists all the available Resources along with the total number of **Current Tasks** assigned to each Resource
- On the Search Field on the top of the Assign Resource menu, start typing a Resource name to assign them to a Task
- From the list of suggested options based on the search criteria, select a preferred Resource name
- Click the **Save** button at the bottom of the Assign Resource menu

Edit Activity - 104566 - Dispatched

Activity Details:

Title *

G 104566

Activity Date Range *

Oct 1, 2019 - Oct 1, 2019

Address *

Spain Square, Plaza d'Espanya, Barcelona, Spain

City *

Barcelona

State/Province

CT

Country/Region

Spain

Country *

Spain

Postal Code *

08014

Contact Details

Name *

123

Phone Number *

123

Notes

Add Activity Description

Assign Resource

Search for Resource

Resources	Current tasks
Raymond Chow	1
218 Resource	18
42	43
92	18
968 validation	6

Status History (Dispatched)

- New → Dispatched Oct 1, 2019 6:52:20 AM Georgiana
- Dispatched → Rejected Oct 1, 2019 6:52:56 AM Georgiana
- Rejected → Dispatched Oct 9, 2019 10:48:29 AM Jyoti Joseph

Assign Resource

Raymond Chow

Resources

Raymond Chow
416-555-5555

Current tasks

18

Cancel Save



Note: The Activity Details window provides detailed information on the following:

- **Activity Title**
- **Resource Name:** indicating the Resource this Task was assigned to
- **Phone:** The Assigned Resource Phone number, if applicable
- **Date and Time:** The Date and Time when the Task when the task was scheduled for
- **Location and Contact Info:** The Location and Contact details of the Task site as indicated by the dispatcher during scheduling, and
- **Status History:** This section provides a detailed breakdown of the Task's progress.

- ## THE TIME CARD REPORT: REVIEW SHIFT DETAILS

Users/Dispatchers can review **Shift Details** for each Day for any Resource from the Time Card Report which provides a detailed breakdown of the Day's work schedule, including the following information:

1. From the Tasks Module, click the **Time Cards** tab
2. From the Time Card Report, click a Day for which you would like to view the Shift Details
3. To exit out of the Shift Details window, click the top right-hand side **X** button on the window.

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