

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

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
- 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 popup Calendar menu, select any of the preconfigured 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

				-							
		Select Date Ra	ange			Unass	igned			22	
Status Resource Name		Past 24 hours Yesterday	K 5	м	Dispatched In Progress Completed					97 27 1	Location
Unassigned	+ Assign Resource	Custom	OCT	ļ	Canc	el				Apply	Strada Caracal 178, C
Unassigned	+ Assign Resource		6 13	14	15	16	10	11	12		Strada Caracal 178, C
In Progress	Georgianaqwert	1	20 27	21 28	22 29	23 30	24 31	25	26		Airport Bus Stop, Piaz Milan, Italy, Milano, 21
Dispatched	Admin3	Cancel							Apply		Milano Centrale Railw Metropolitan City of N
Dispatched	Unassigned				c	bnm 1	445				Spain Square, Plaça d ESP

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



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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

Nov 5, 2019 - Nov	5,2019											
elect Date R	ange											×
Today	<		Nove	mber	2019		>	From				
Tomorrow	s	м	т	W	т	F	s	11	~	: 00		M PM
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	3	4	5	6	7	8	9	01	~	: 00		M PM
	10	11	12	13	14	15	16				_	
	17	18	19	20	21	22	23					
	24	25	26	27	28	29	30					

- Enter all other information in the remaining fields, as 6. 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

Assign Resource	
Q Conni	×
Resources	Current tasks
Connie Wang	3

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

New Activity	Cancel	Save
Activity Details: Title* Heavy Equipment Move	Assign Resource Connie Wang Resources Connie Wang N/A	Current tasks
Activity Date Range * New 5, 2019 - New 5, 2019 Address*		
Venice, Metropolitan City of Venice, Italy City* State/Province Venice Venice Venice		
Country/Region Country* Postal Code* EnterCountry Italy Postal Code*		
Contact Details		
Steve Roversi Phone Number*		
Notes Add Activity Description		

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 1

from the Actions column next to an Activity

2. Click the Cancel Activity button

Edit	
Cancel Activity	

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



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- Alternatively, to Edit an activity, click the three-dot Ellipses button from the Actions column next to an Activity.
- Activity _____ 5. click the **Edit** button
 - Edit Cancel Activity
- 6. Edit all the fields on the Edit Activity screen, as necessary
- 7. 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.

Activity Details:				4.	sign Resource	
Title*				Q	Search for Resource	
G bnm 12445				Res	ources	Current tasks
					rarc	1
Activity Date Range *				228	Resource	16
Oct 1, 2019 - Oct 1, 2019				42		45
Advisors *				92		18
Spain Square, Place d'Expense	Barrelona Snain			944	8 validation	6
				_		
City*	\$	tate/Province		Sta	tus History (Dispatched)	
Barcelona		CT			New	Georgiana
County/Region	Country*		Postal Code *		N/A	
Enter County	Spain	~	08014		Dispatched $ ightarrow$ Rejected	Georgianaqwert
					Oct 1, 2019 6:53:56 AM 236 Strada Traian Vula, Craiova, DJ, I	eou
				14	Rejected 🔶 Dispatched	Joyel Joseph
Contact Details					Oct 9, 2019 10:48:29 AM N/A	
Name *				_		
123						
Phone Number *						
123						
Add Activity Description						

MANAGE ACTIVITIES: ASSIGN A RESOURCE

Only for **Unassigned** Activities, where a Recourse 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

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					Q Search for Resource	
Q IES	× 000,00	and a second second			Resources	Current tasks
						1
					228 Resource	13
Status	Resource Name	Activity Title	Location	Start Time	4	45
					92	18
Country	+ Assign.Resource	Judomation Testindg 10	Strada Caracal 178, Cratova, Bornava, Cratova, 200348, 00, 800	Oct 23, 2019-43	9968 validation	4
					Aamir Wareen D800000 edit 2	15
(unnigned	+ Assign Resources	Automation TestAdg A1	Strada Caracal 178, Cralova, Romania, Cralova, 200746, DJ, ROU	Oct 21, 2019-843	activate resource	
					add resource	1
	* 60081.2900938	ALLER ALLER THE ASE AS	Strada Caraca: 116, Craova, Romania, Craova, 20046, 51, 950	00122,2019 204	Admin3	34
-	+ Assist Resource	Automation TestAdg 48	Strada Caracal 178, Craiona, Romania, Craiova, 200346, DJ, ROU	Oct 22, 2019 24	Admini	2
					adress	12
	+ tooge herowite	Automation TextAdg 87	Strada Caracal 519, Craiona, Romania, Craiova, 200746, 50, ROU	011 22, 2058 715	adiang	79
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00000	+ Assept. Resource	Automation TextAdg #7	Strada Caracal 176, Cratova, Romania, Cratova, 200746, SU, ROU	Oct 22, 2019 7/8	stly	
-	literational	Bardy 2222 mass	Strafa Caracel 128 Craines Remarks Colore 2003al Di ROJ	011 2022 741	Alec+11	2
					Alex Dubre	11
-						

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





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THE HISTORY SCREEN: REVIEW ACTIVITY DETAILS

The History screen of the Tasks Module displays a historical data of all **Completed** and **Cancelled** activities. Users/Dispatchers can also review the Details of a past Activity from the History screen.

- 1. From the Tasks Module, click the History tab
- 2. To filter the list of Activities on this screen, based on Activity Title and /or Location and/or Assigned Resources and/or Date 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 lefthand 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
- 3. To access the Activity Details for a specific Task, click the Activity and an **Activity Details** window displays on the right-hand side of the screen.

Q. Search for	Activities	Oct 30, 2009 - New 5, 2009			Resource Pho NIA NIA	ne -
Satus	Resource Name	Activity Title	Location	Dispatch Time	Date and Time From From Oct 30, 2029 3:56:32 AM Location and Contact Info	
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Canodical	311009 last	test 311003	Craiova, Plața Constanțin Brâncuși, Craiova, Romania, Creiova, 12345, DJ, ROU	0xt 31, 2019 9:19:11 A	Name 22 Phone Number	
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Completed	Georgianaquent	ACT7 SSS	Long Beach, CA, USA, Long Beach, 123123, CA, USA	Oct 24, 2019 5:00:30 A	Oct 30, 2029 3 56 31 AM	
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Completed	Georgianaquert	Text 2 adg	Strada Caracal 178, Craiova, Romania, Craiova, 200746, DJ, ROU	0et 24, 2019 8 02:58 A	Accepted → Started Oct 30, 2019 4:15:20 AM 111 Strade Caracel, Onione, DJ, ROU	42

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

The Time Card Screen of the Task Module displays a Report with a list of all the Resources, as well as a breakdown and a summary of their work schedule, as entered by the Resources from the Task Tracker Mobile App.

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:

- Clock in and Clock Out Time & Location of the Resource
- Break Start Time and Break End Time & Location of the Resource
- 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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