Welcome to the Fleet Complete eBook Series

TASK TRACKER - DESKTOP & MOBILE APPLICATIONS

Software Version: R1.14
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Author: Training Department

Table of Contents

How to use this eBook

This online format enables you to locate topics of interest by using a dynamic table of contents.

1. *To access a topic, click a blue underlined hyperlink.*
2. *To return to the Table of Contents page, click the Grey Book icon that is located in the upper right corner of every page.*

Tip!

*You can also press the CTRL and **F** keys at the same time to perform key word searches.*

Task Tracker

Table of Contents

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Table of Contents

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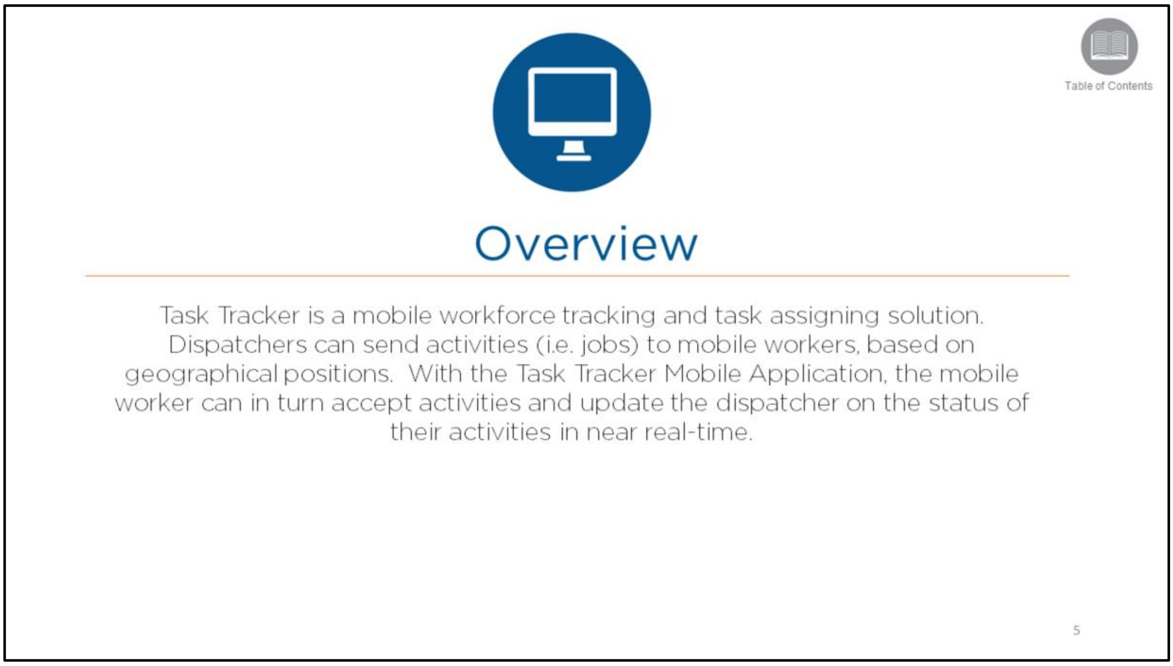


Overview:
- Read the slide.

Table of Contents

Key Benefits

- GPS location tracking
- Schedule and dispatch activities to mobile workers via handheld devices
- Real-time status updates for dispatched activities

Overview:
Read the slide.

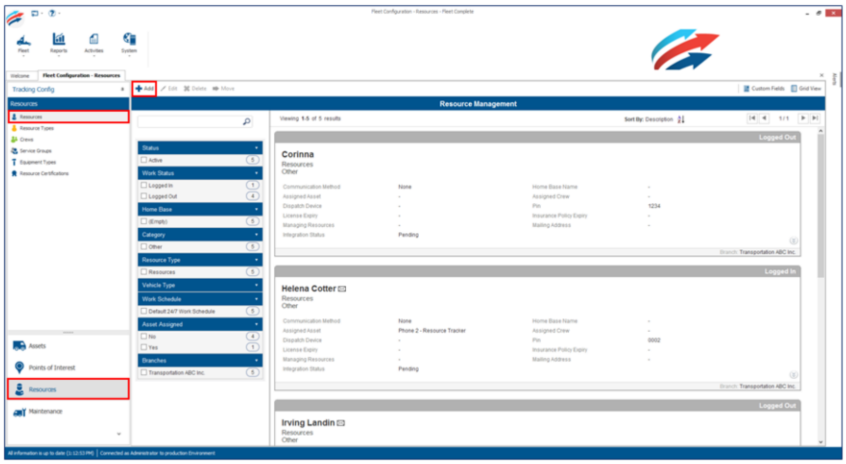
Overview:

- The application is currently available for Android and iOS devices and can be downloaded from the respective App stores.

Overview:
- Read the slide.

Table of Contents

Accessing Resources



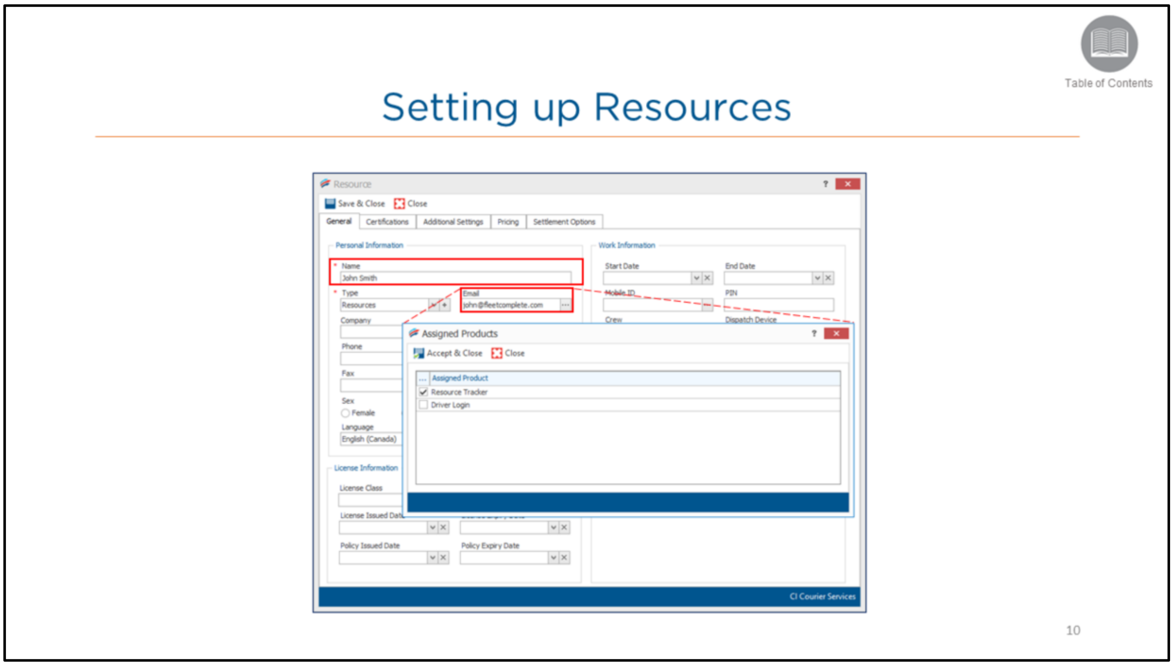
9

Overview:

- A **Resource** is a driver or employee, who works for your organization.
- Resource Records will need to be set up in the application prior to being able to track them.

Steps: Accessing Resources

1. From the main toolbar select, **System / Configuration /** and then **Fleet Configuration**
2. From the lower left menu, select **Resources**
3. From the upper left menu, select **Resources**
4. Select **Add**

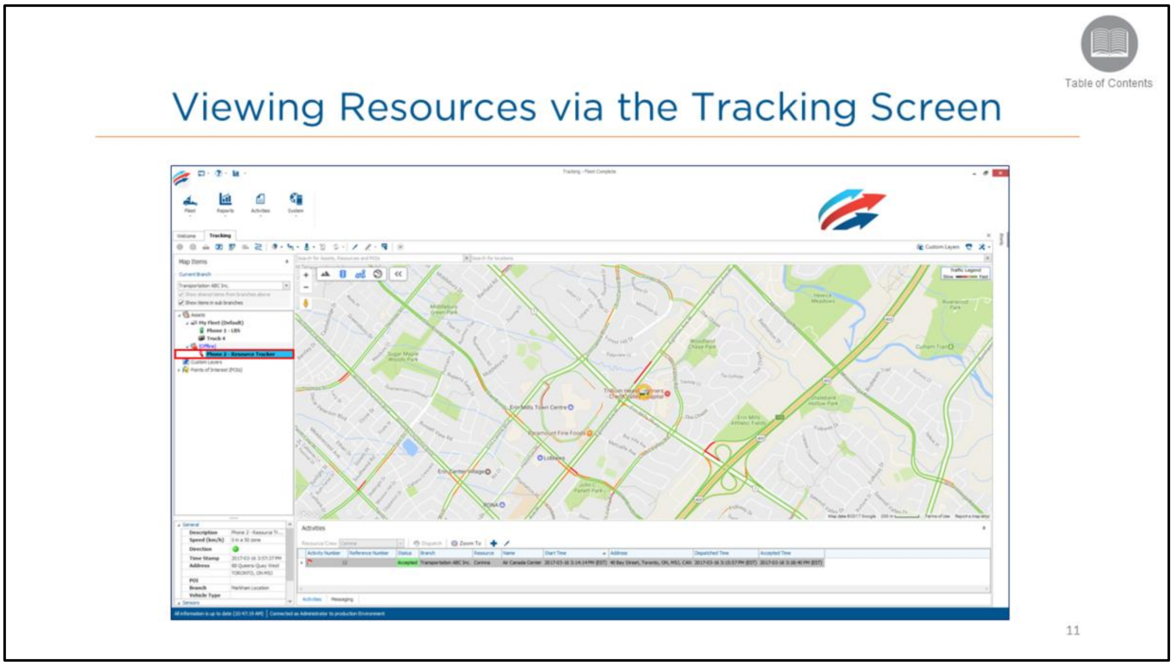


Overview:

- Within the Resource screen, there are **four mandatory fields** which are marked with **red asterisks**.
- Three of the fields are pre-populated with default information.
- The email address will be used by the Resource when they log in to the mobile application.
- The Ellipsis button allows you to assign the Task Tracker product to the Resource.
- Once assigned, the application will send an email to the Resource with a temporary password to log in to the mobile application.
- The Resource will be prompted to change their password upon login.
- On the Resource screen, all other information is optional and can be completed to the level of detail that is necessary, and at any time.

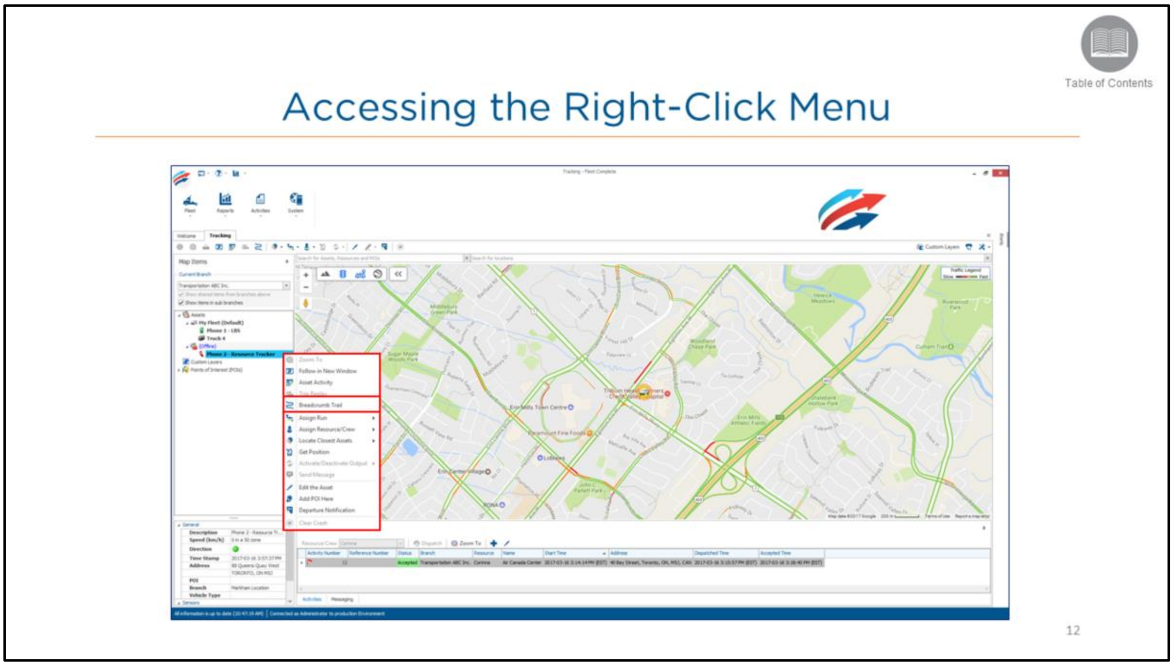
Steps: Add a Resource Record

1. Click the **Add** button
2. Type the Resource's name in the **Name** field
3. Type the Resource's email address in the **Email** field
4. Click the **Ellipsis** button to the right of the *Email* field
5. On the Assigned Products screen, select **Task Tracker**
6. Click the **Accept & Close** button
7. From the Communication Method dropdown list, leave as **None**
8. Click the **Save & Close** button



Overview:
- Here is an example of how an employee logged in to the Task Tracker application on their mobile device displays in the Tracking screen.

Steps: View a Resource via the Tracking Screen
1. From the main toolbar select, **Fleet** and then **Tracking**
2. From the *Map Items* panel, select the **Resource's** name



Overview:

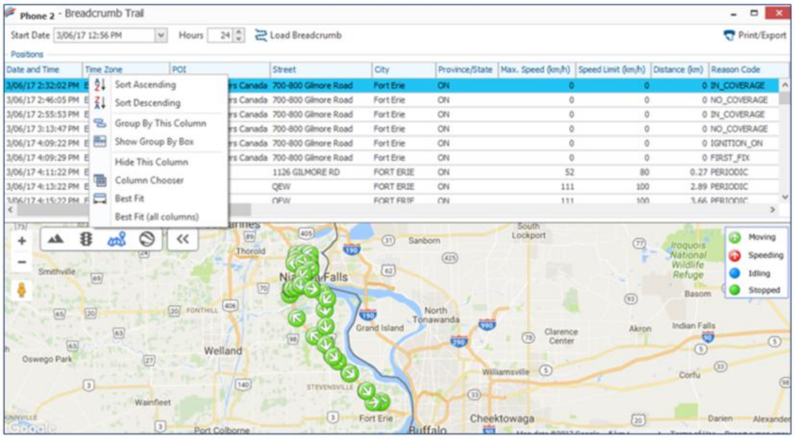
- In the Tracking screen, there are additional tracking features available as a menu when you right-click a resource in the *Map Items* panel or by right-clicking a resource icon directly in the Map area.
- These features are also available to you in the *Ribbon Toolbar* as icons that are located above the *Map Items* panel.
- For a full description of the Resource's right-click menu items, you can refer to the Quick Reference Card on "Working with the Tracking Screen" which can be accessed from welcometofleetcomplete.com.

Steps: Accessing the Resource's right-click menu

1. Navigate to the *Tracking* screen
2. In the *Map Items* panel, right-click the ***Resource's Name***
3. In the *Map Area*, right-click the ***Resource's*** icon

Table of Contents

Accessing the Breadcrumb Trail



13

Overview:

- The **Breadcrumb Trail** screen is organized into two sections: it provides a Grid in the upper section with all the available positions for the most recent 24 hours by default, and a Map Area in the lower section.
- You can view the trail for a specific time period by changing the date, the time, and the number of hours you want to view, and then click **Load Breadcrumb** to update the grid and the map area.

<u>Customizing the Grid's Layout</u>

- When you are updating the grid it is recommended to place the information that you will be reviewing most often is upfront and to the left as much as possible. This way, you will not have to keep scrolling for the information that you need.
- You can also move a column by dragging-and-dropping the *Column Name* to a different location in the column line-up.

<u>To customize the columns in the grid you can right-click on any column header to access a menu:</u>

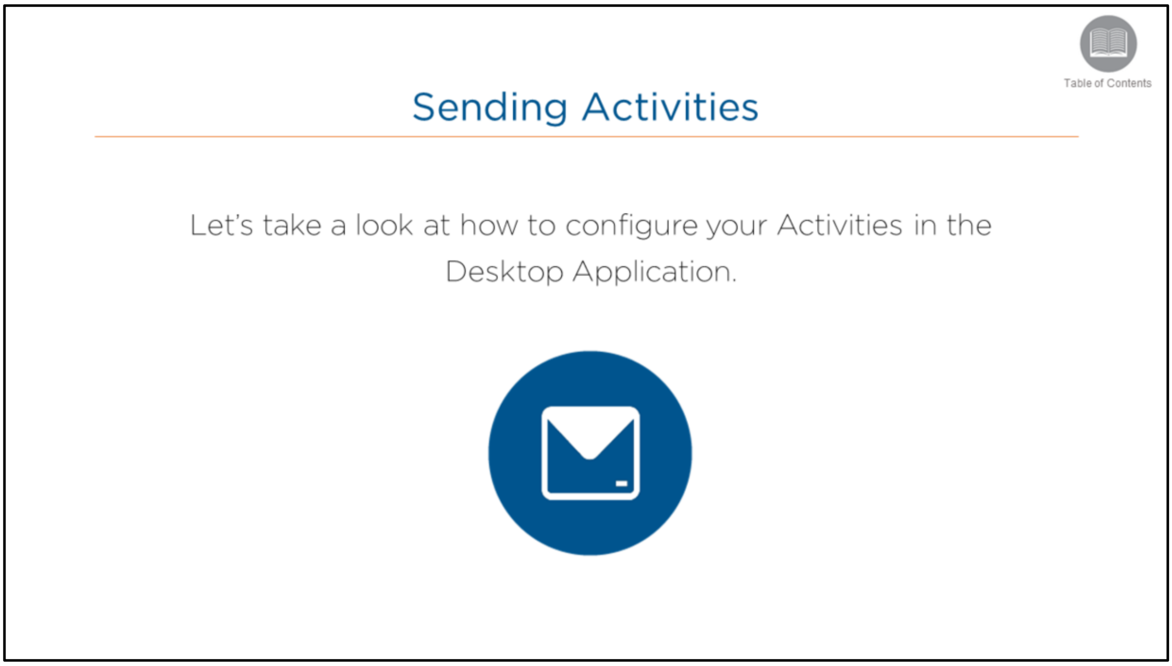
- By selecting **Best Fit (all columns)**, all the columns and headers in the grid are sized proportionate to the text contained in them.
- By selecting **Hide this Column** you are able to hide any column from view.
- By selecting **Column Chooser** you are able to place any column that was previously hidden by dragging-and-dropping the *Column's Name* back into the line-up, or by double-clicking the Column's Name.
- Once you've completed your updates and you close the Breadcrumb Trail screen, the system will remember your user preferences.

<u>Map Area</u>

- In the ***Map Area*** below the icons are highlighted in yellow as you click the different positions from the grid section.
- Icons for a Task Tracker asset will display as solid green dots.

Steps: Accessing the Breadcrumb Trail

1. Navigate to the *Tracking* screen
2. In the *Map Items* panel, click a *Resource's* name
3. From the resource's right-click menu, select **Breadcrumb Trail**
4. In the *Start Date* field, type the date and time that you want view
5. In the *Hours* field, type the number of hours that you want to view
6. Click **Load Breadcrumb**



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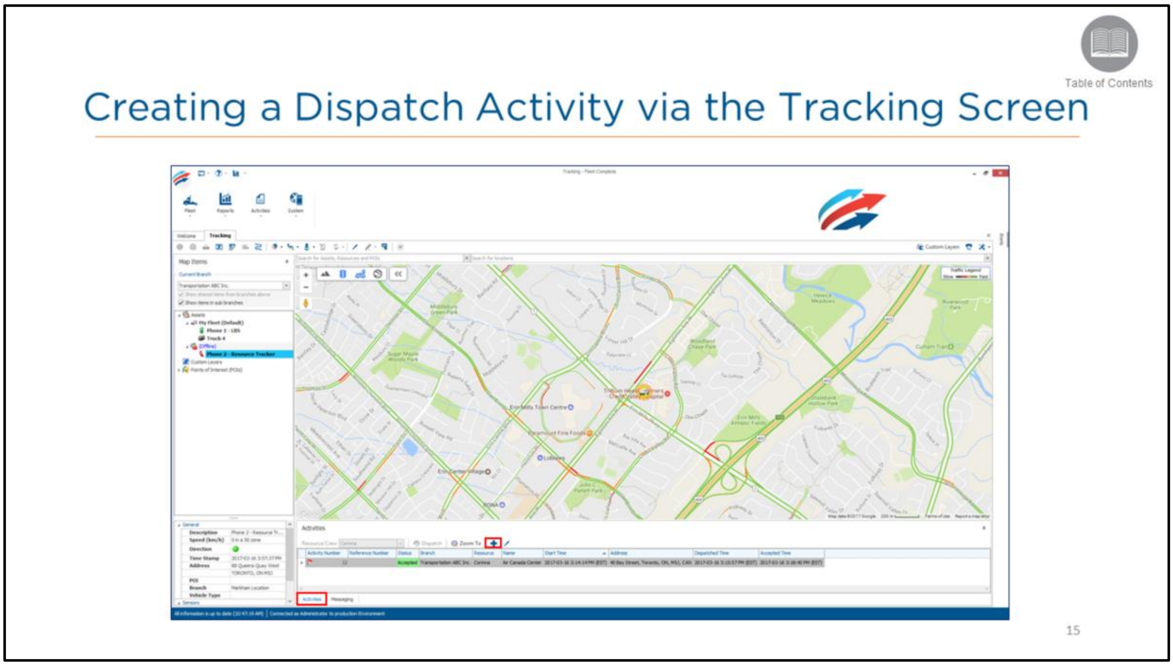
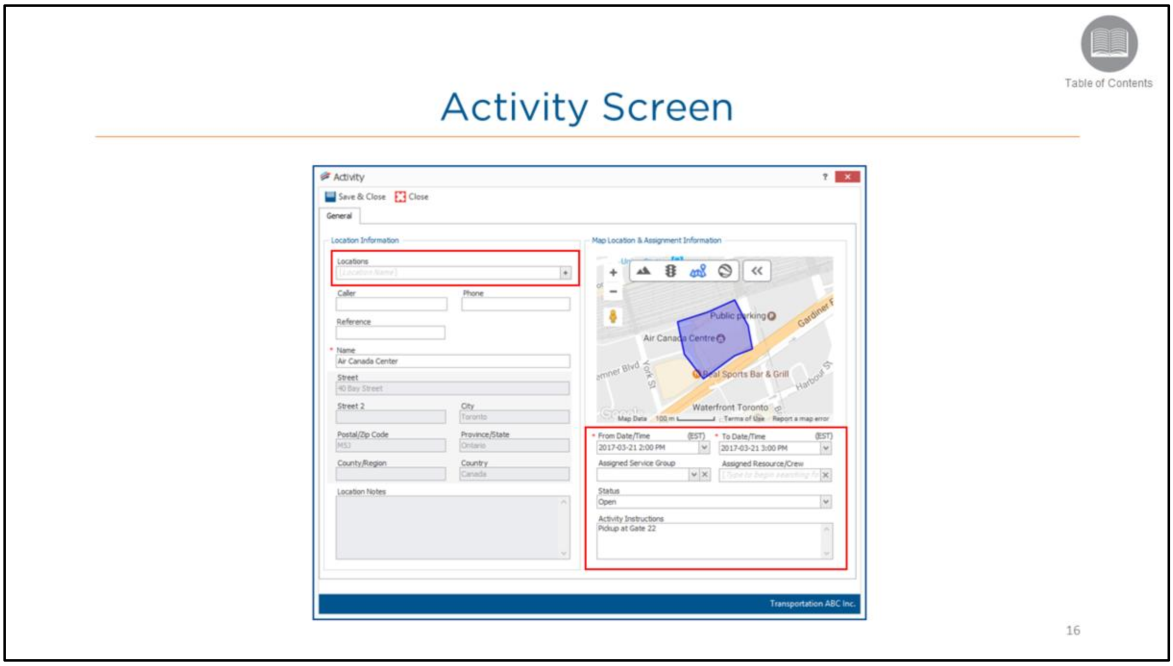


Overview:

- Dispatch Activities are tasks that need to be performed at a specific location, assigned to a Resource, and then monitored in terms of their progress.
- Activities can be created from two areas of the application; from the main toolbar and the Tracking screen.

Steps: Creating a Dispatch Activity via the Tracking Screen

1. Select the **Activities** panel below the map area
2. Click the blue **Plus** (+) button



Overview:

- The Activity screen allows you to send location information to the resource.
- Locations can be a Point of Interest that you have already saved in the application, or you can create a new location manually as the destination.

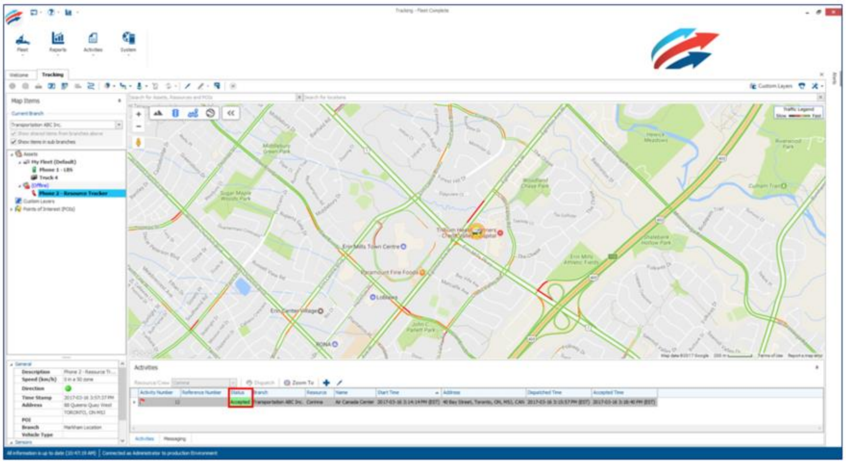
Steps: Creating a Dispatch Activity via the Tracking Screen

1. In the **Locations** field, type in the first few characters of the Point of Interest if applicable, and then select the POI description from the list
   Or to create a new destination, click the **Plus** (+) button to the right of the *Locations* field
2. Type a description in the **Name** field, and complete the address fields as required
3. On the Activity screen in the **From Date/Time** and **To Date/Time** fields, select the date and time frame this activity is to be started and completed by
4. In the **Assigned Resource/Crew** field, select the resource to perform this task
5. If the activity is assigned to a mobile worker from this screen, the **status** field will automatically change from *Open* to *Dispatched*
6. Enter any important details pertaining to the task in the **Activity Instructions** field
7. Click the **Save & Close** button

Notes: all other information is optional and can be completed to the level of detail that is necessary. The Activity Instructions will be displayed in the mobile application for the mobile worker.

Table of Contents

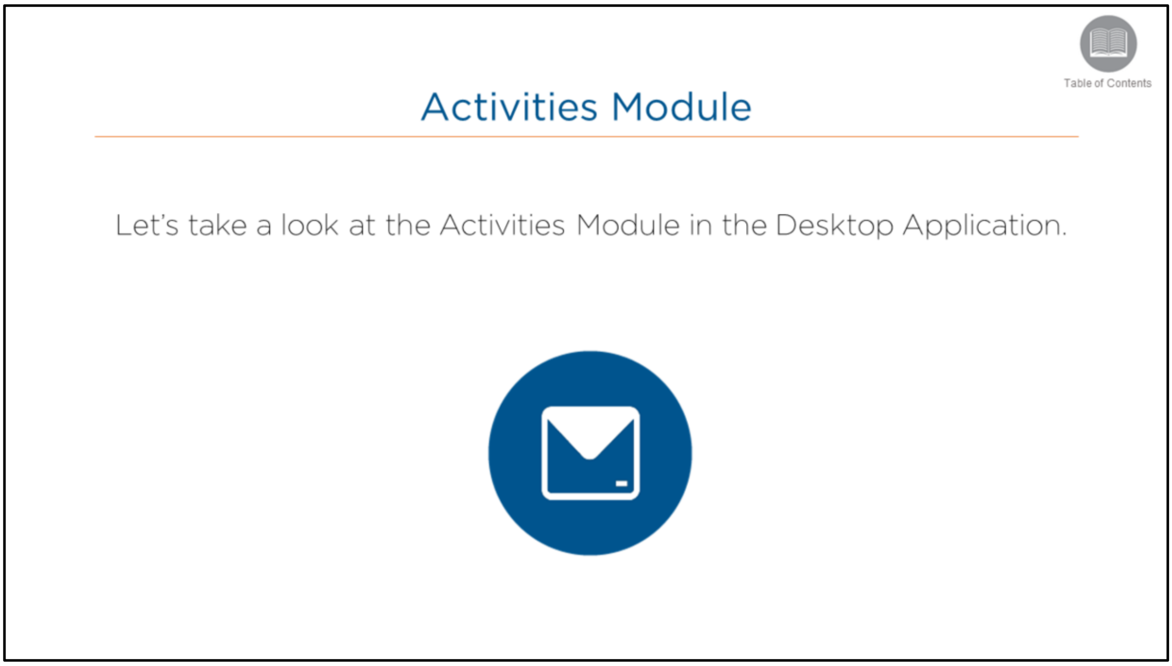
Managing Dispatched Activities



17

Overview:

- In the **Activities** panel located below the map, you can view the status of the activity.
- The activities that are **Completed** will no longer display in the panel.
- The **Status** column displays different colors based on the state of the activity:
    - Blue = Open (the activity is created)
    - Purple = Dispatched (the activity is assigned to a resource)
    - Green = Accepted (the activity has been accepted by the resource)
    - Red = Rejected (the activity has been declined by the resource)



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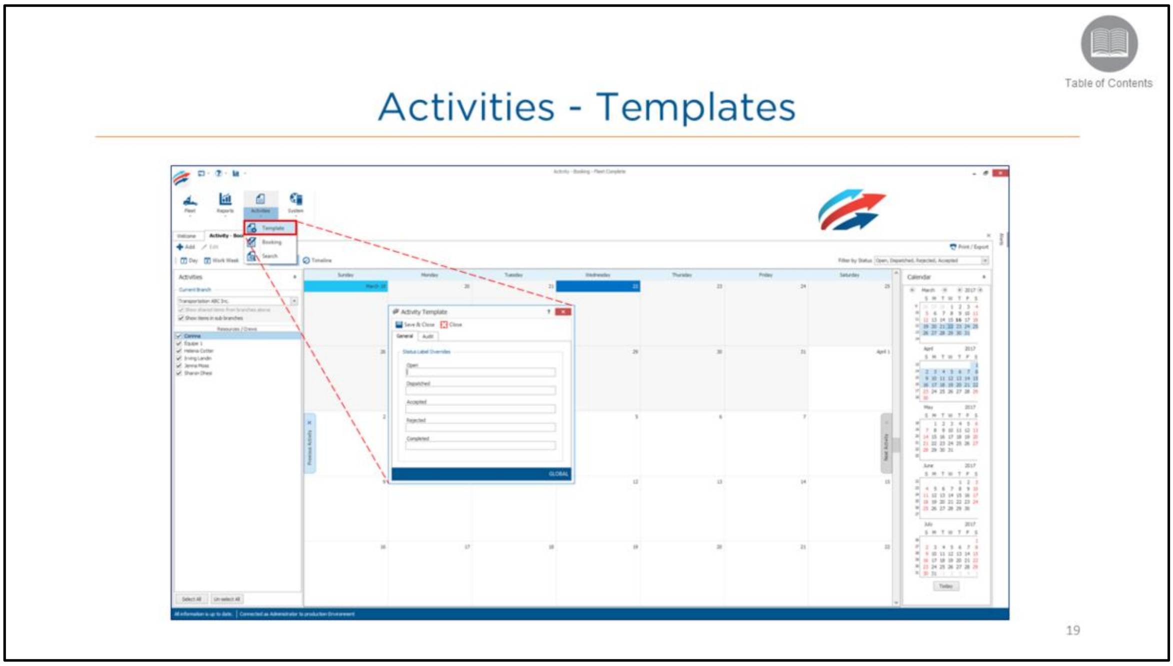


Overview:

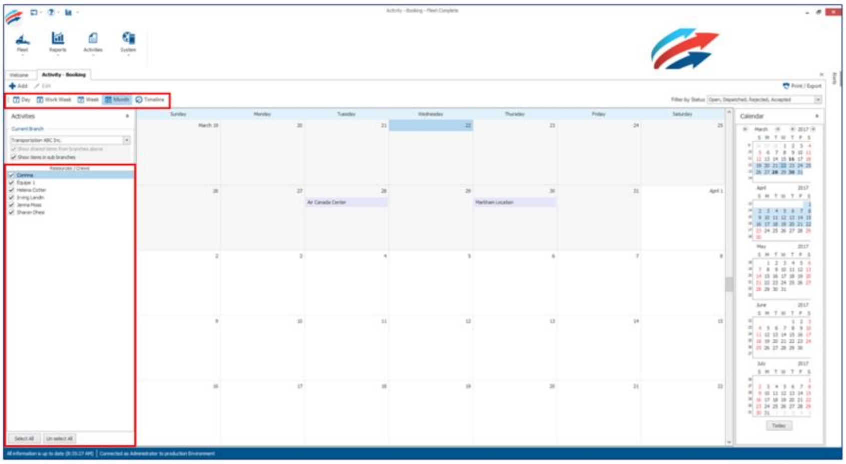
- The Activity Template screen allows you to **Override** the existing **Status Labels**, which include: Open, Dispatched, Accepted, Rejected and Completed.
- For example, you may want to use the term *Declined* instead of *Rejected*.

Steps: Status Override Label

1. From the main toolbar select, **Activities /** and then **Template**
2. On the Activity Template screen, type in the **new status label** in the corresponding fields

Table of Contents

Activities - Booking Screen



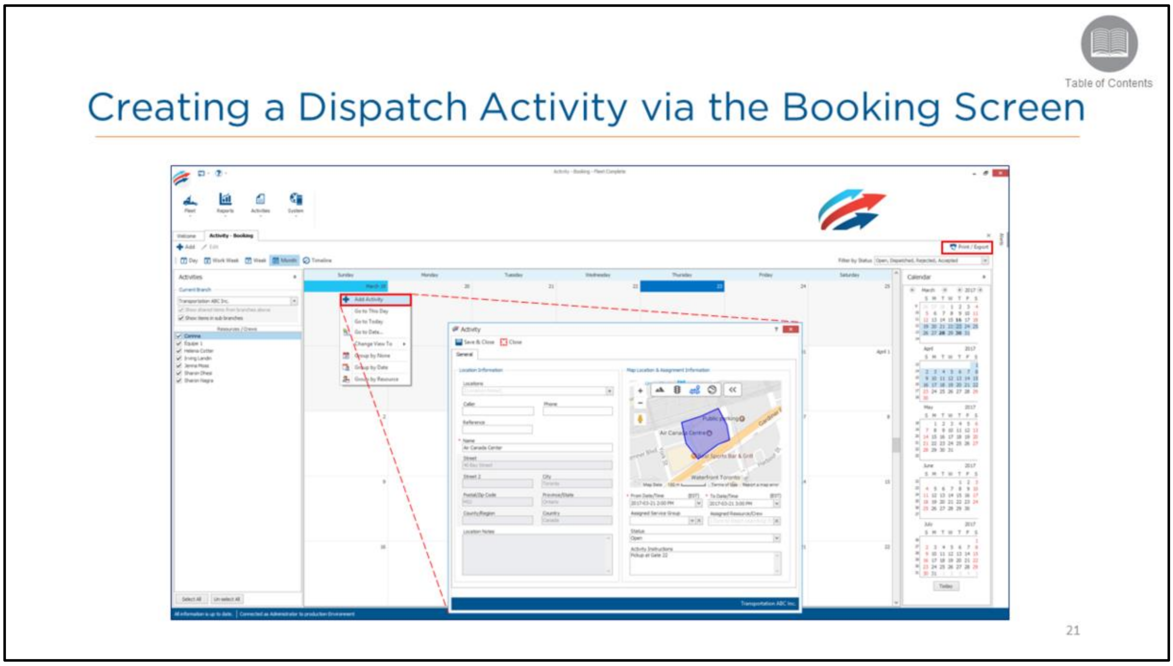
20

Overview:

- The *Booking* screen allows the dispatcher to have access to a calendar to help plan their activities.
- It contains a **Resources panel** to the left, listing the resources that are logged-in to the mobile application.
- A **Calendar** in center, showing by default the monthly calendar view.
- This can be changed by using the Day, Work Week, Week, Month or Timeline buttons that are located in the ribbon toolbar.
- A **monthly Calendar panel** to the right, of the current and next four months, with holidays marked.

Steps: Viewing the Booking Screen

1. From the main toolbar select, **Activities /** and then **Booking**
2. Select the **Calendar View** you want to display
3. Select the checkbox next to the **Resource's** name to view their activities on the calendar

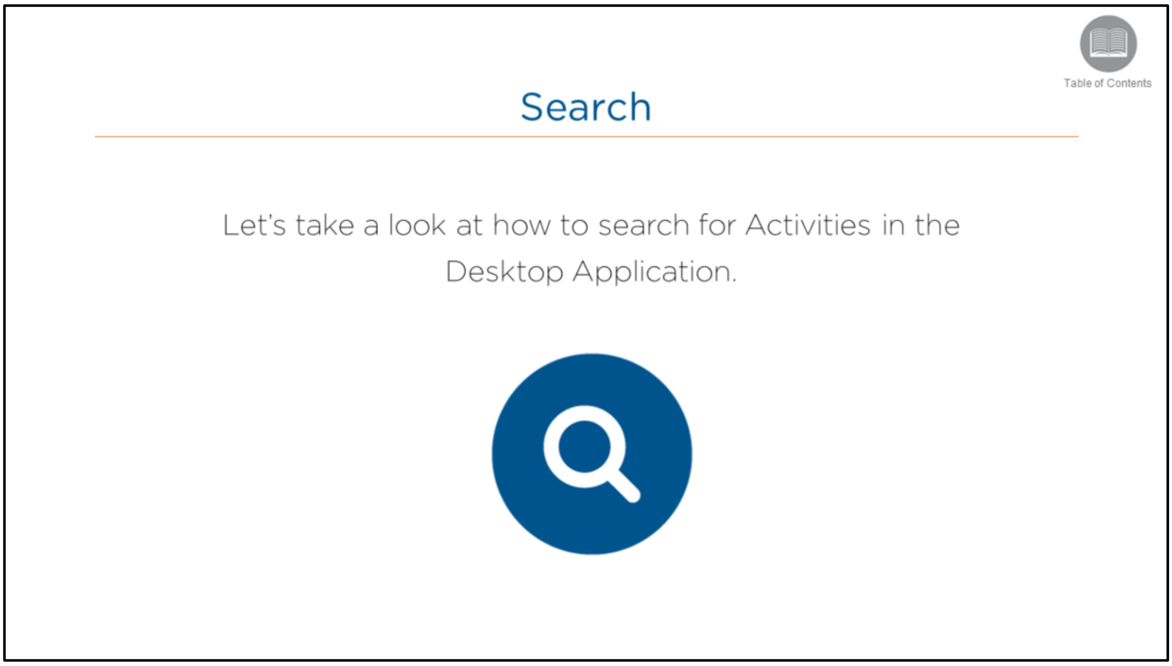


Overview:

- Activities can be accessed from two areas of the application; from the **Tracking screen** and from the **Activities Module**.
- Booking works as a **schedule planner** that enables you to book an activity in advance.
- You do not have to assign a resource to an activity immediately, you can leave the activity's status to open.
- When you are closer to the due date of the activity, you can assign a resource from the Tracking screen.
- From the Booking screen you have the option to **Print/Export** this summary from the top right hand corner of the screen.

Steps: Creating a Dispatch Activity via the Booking Screen

1. From the main toolbar select, **Activities /** and then **Booking**
2. Right-click the Calendar Day you want to schedule the activity on
3. From the menu select **Add Activity**
4. In the *Activity* screen, type the details of the Activity
5. Click the **Save & Close** button



Overview:

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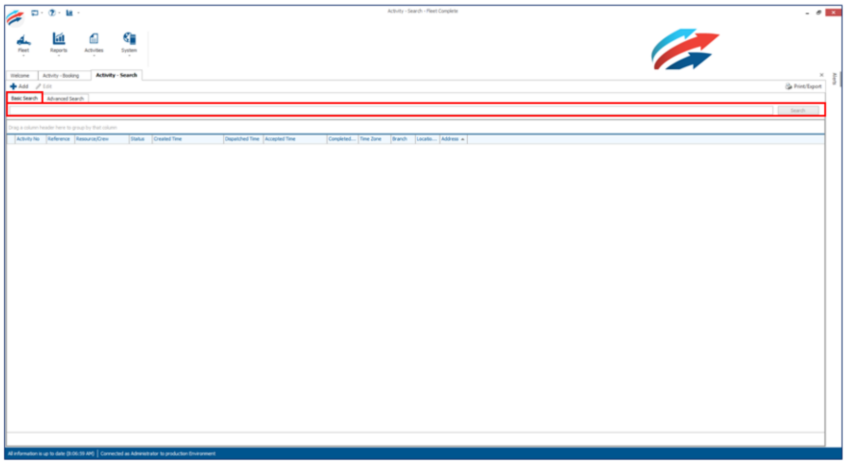
Table of Contents

Activities – Basic Search



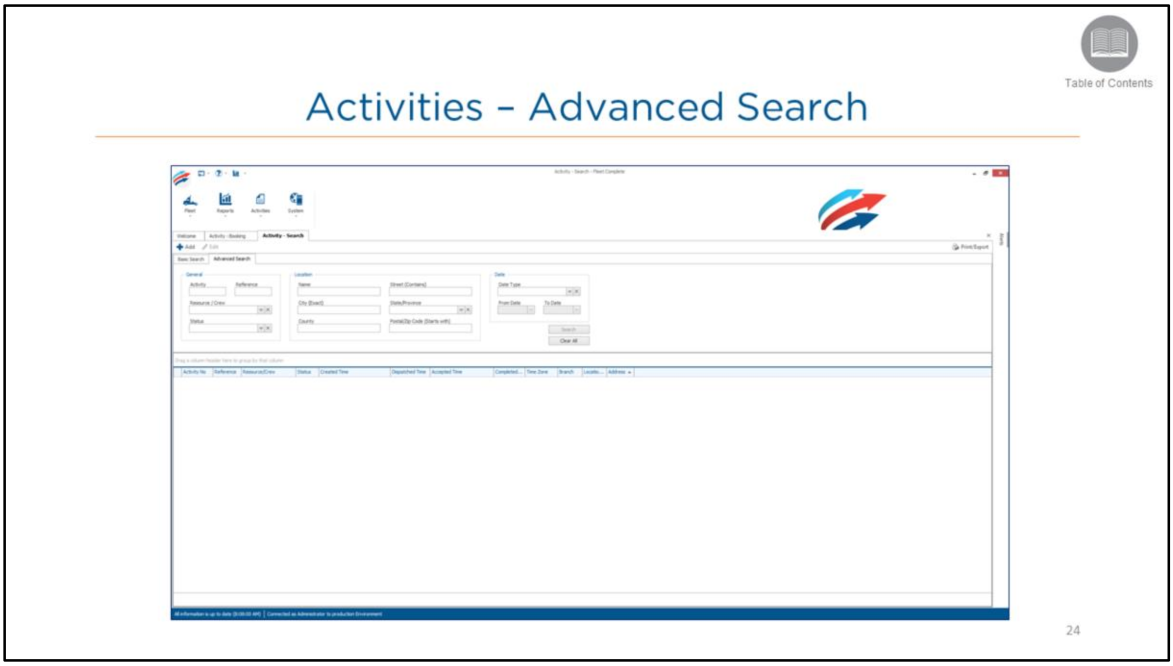
23

Overview:

- The *Search* screen allows a dispatcher to locate and review existing activities based on specified criteria in a list format.
- The **Basic Search** tab enables you to search for activities based on a single criterion (activity number, reference, location (POI), or assigned resource/crew).

Steps: Completing a Basic Search

1. From the main toolbar select, **Activities /** and then **Search**
2. Select the **Basic Search** tab
3. In the *Search* field type in a single criterion
4. Click the **Search** button located to the right of the search field

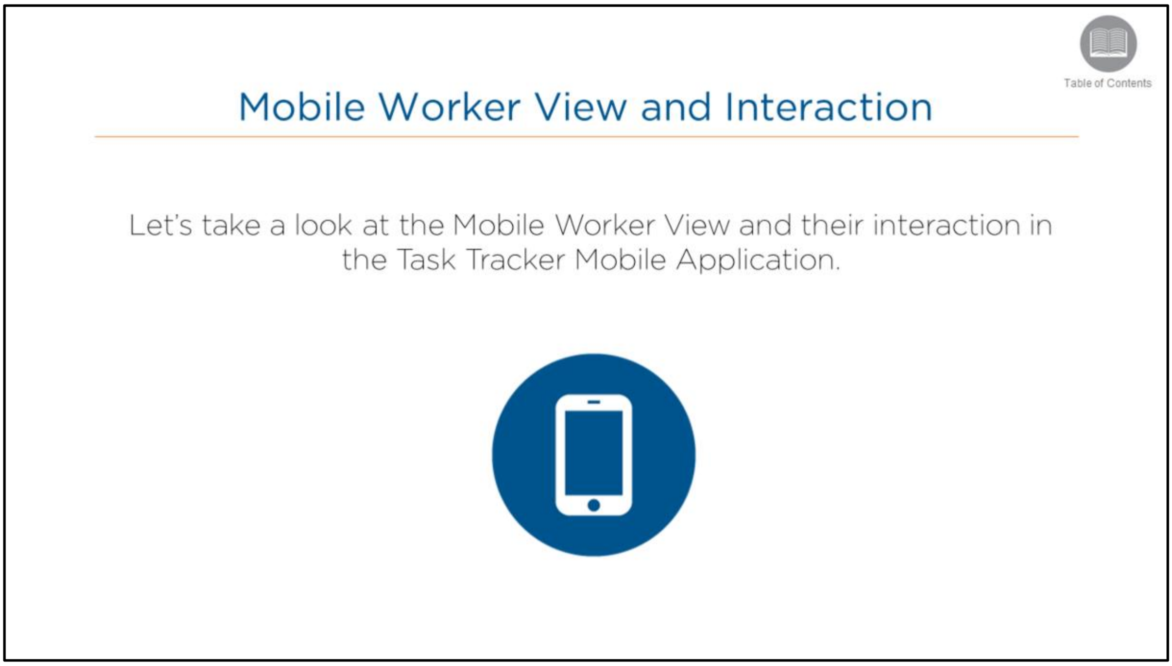


Overview:

- The *Advanced Search* tab allows you to search for activities based on multiple criteria available in the following sections: general, location and date.

Steps: Completing an Advanced Search

1. From the main toolbar select, **Activities /** and then **Search**
2. Select the **Advanced Search** tab
3. Complete the fields as necessary
4. Click the **Search** button located to the right of the search field



Overview:
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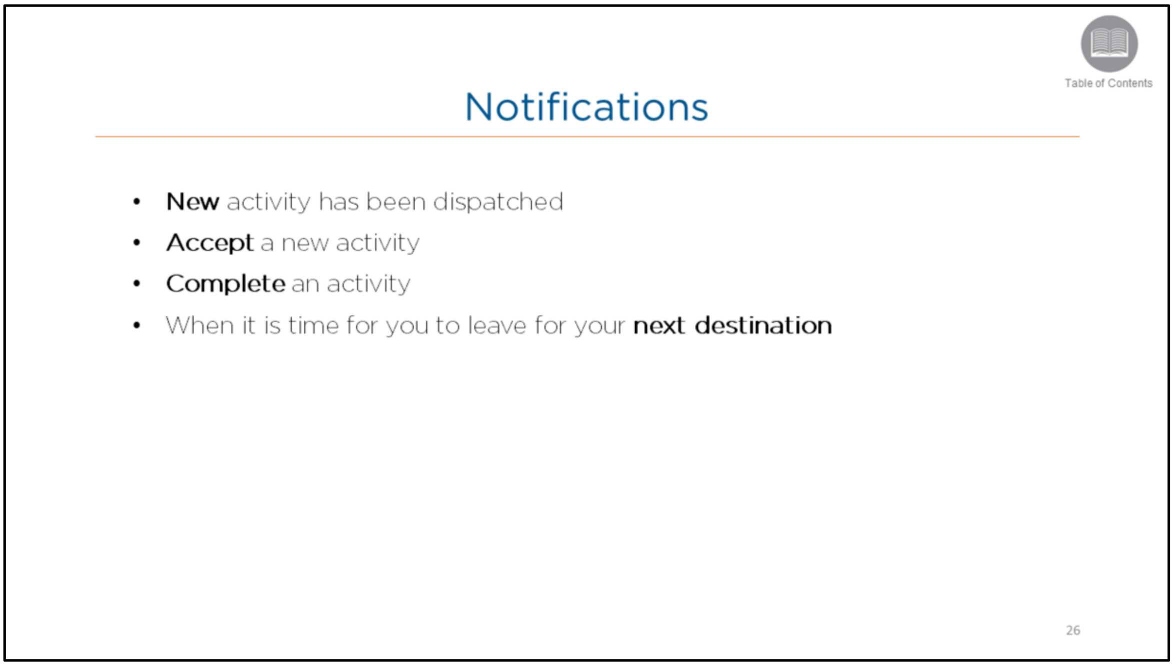
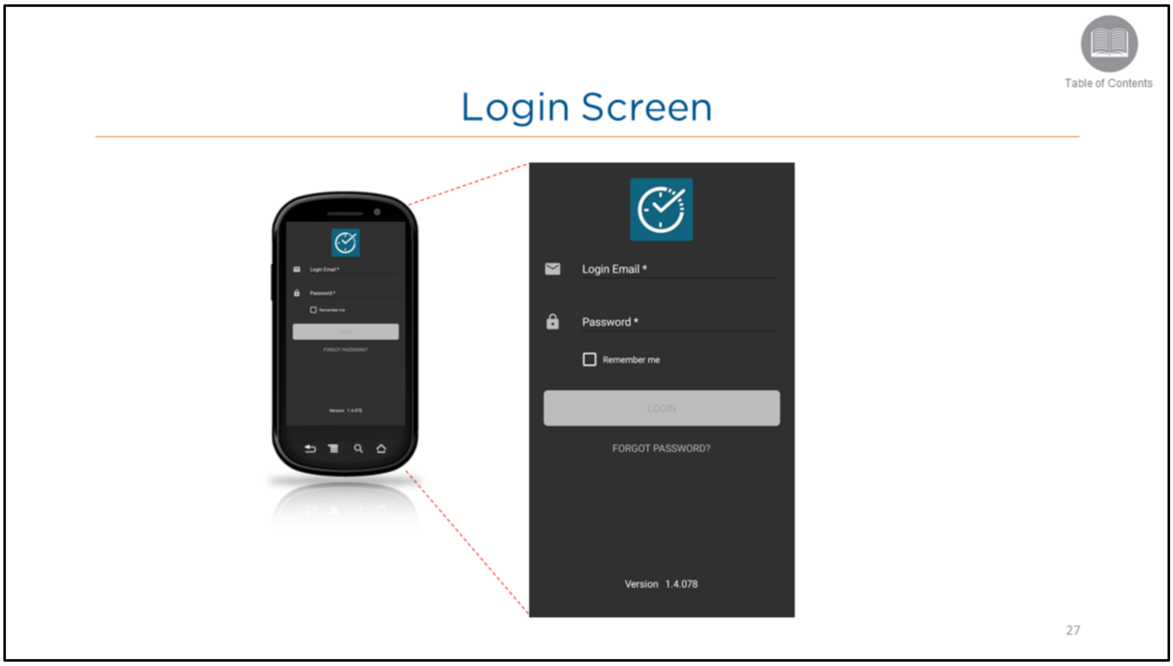


Overview:

- The Mobile Application uses notifications to help keep the resource informed about the status of activities.

The Mobile Application will notify the resource when:

- A new activity has been dispatched
- A new activity has been accepted
- An activity has been completed
- When it is time to leave for the next destination



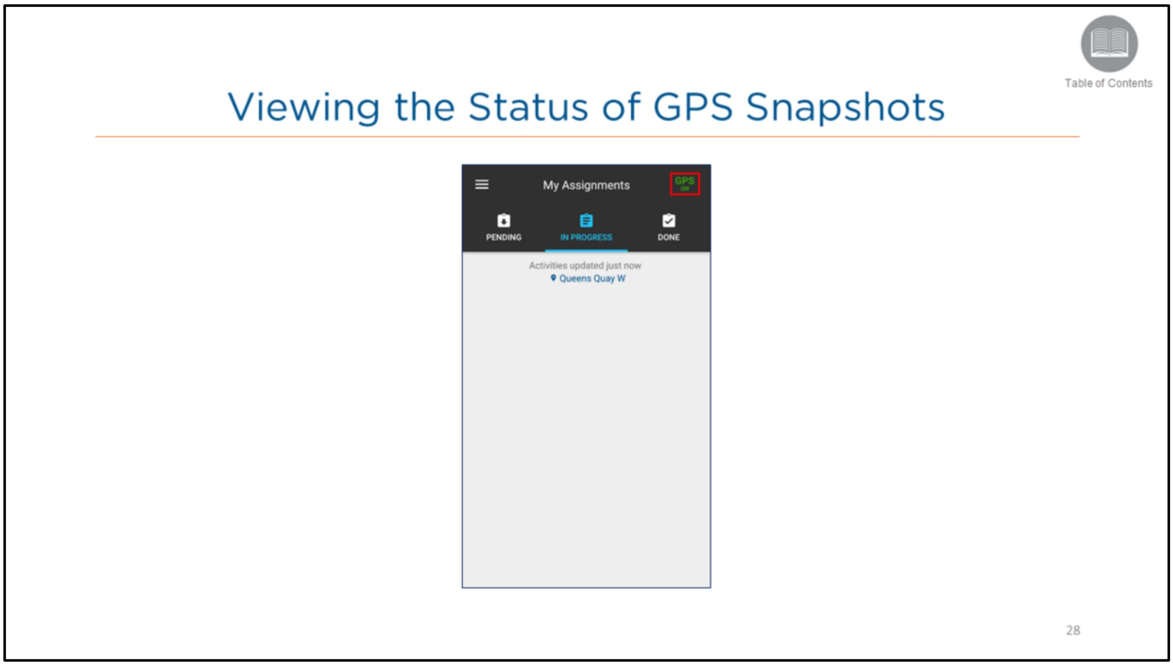
Overview:

- Mobile Workers are required to log in to the Task Tracker application using their email address and a temporary password that was sent to their email by the Desktop Application.

Steps: Logging in to the Mobile Application

1. On the *Login* screen in the *Login Email* field, type your *email address*
2. In the *Password* field, type your password information
3. If you would like the application to remember your login credentials for future use, tap the checkbox for **Remember Me**
4. Tap **Login**

Note: If you can't remember your password on subsequent login attempts, tap **Forgot Password?**

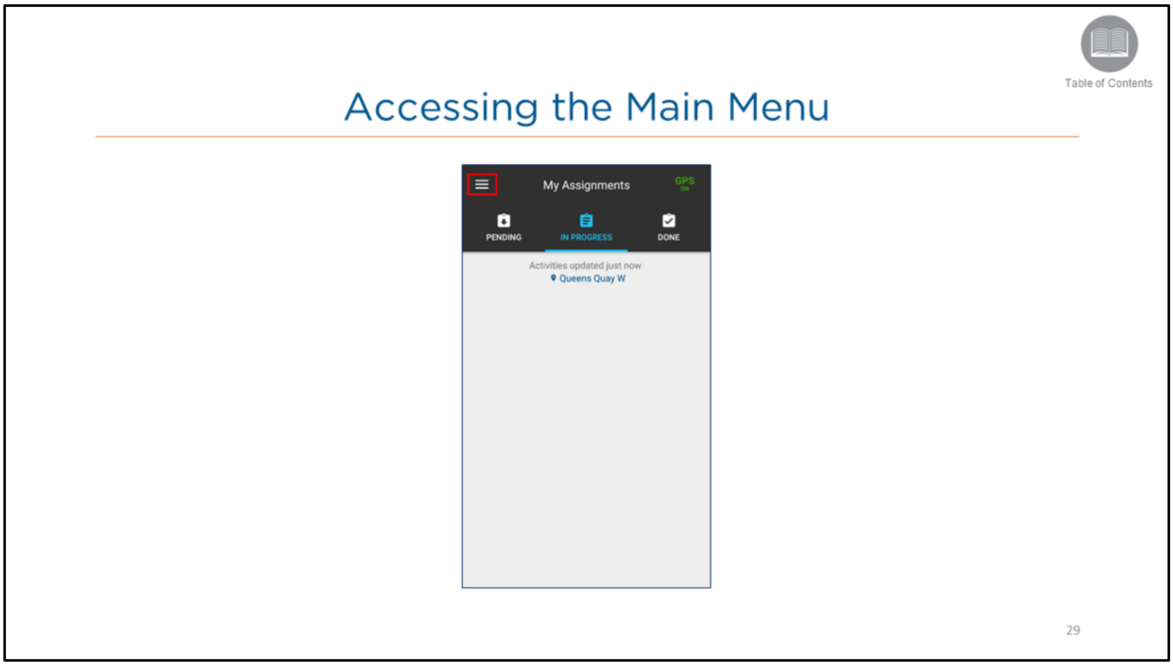


Overview:

- When you are logged in, the application will verify if your phone number matches with any phone number stored in the Desktop Application,
  and if it is registered to a device that is assigned to an asset.
- If it does not match, you will be prompted to type in your phone number, which can be updated under Settings at any time.
- If the phone number is registered, you will see a **GPS ON** icon in the upper right corner.
- GPS snapshots will be sent from the device to the Fleet Complete Desktop Application every 30 seconds.
- If the device's location has not changed during the 30 seconds, no snapshot will be sent.
- If the phone number is not registered, you will see a **GPS OFF** icon in the upper right corner.
- No GPS snapshots will be sent from the device to the Fleet Complete Desktop Application.

Steps:

1. Log in to the mobile application
2. If prompted by the app, type the device's phone number

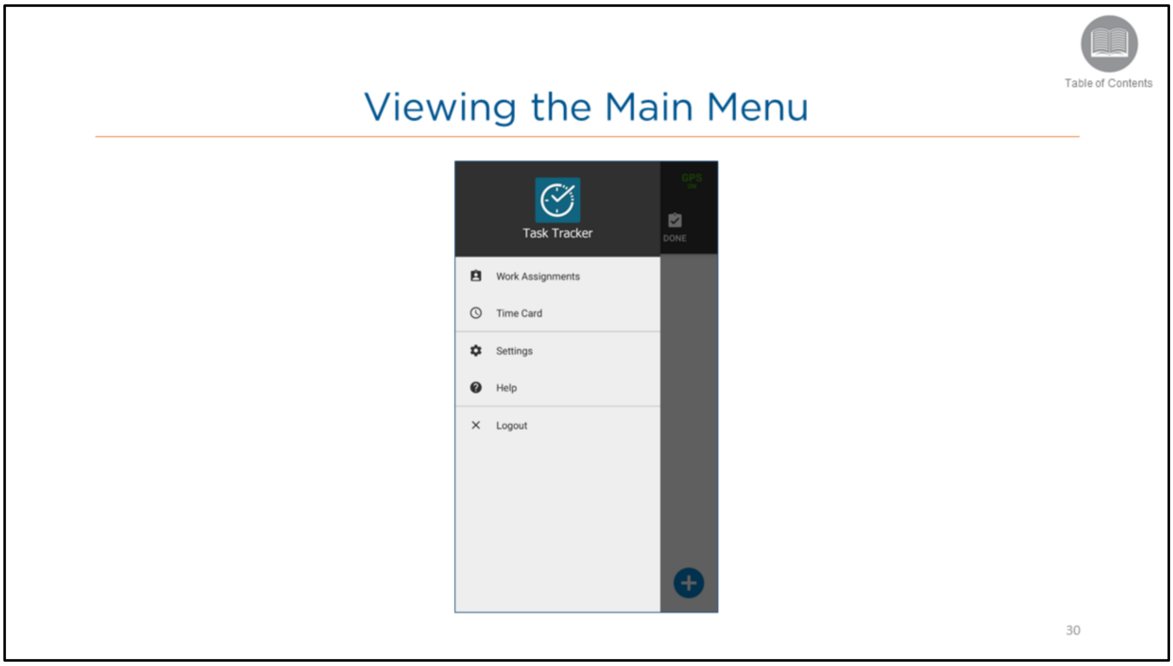


Overview:

- To access the Main Menu, you can tap the 3 line menu icon located on the *My Assignments* screen.

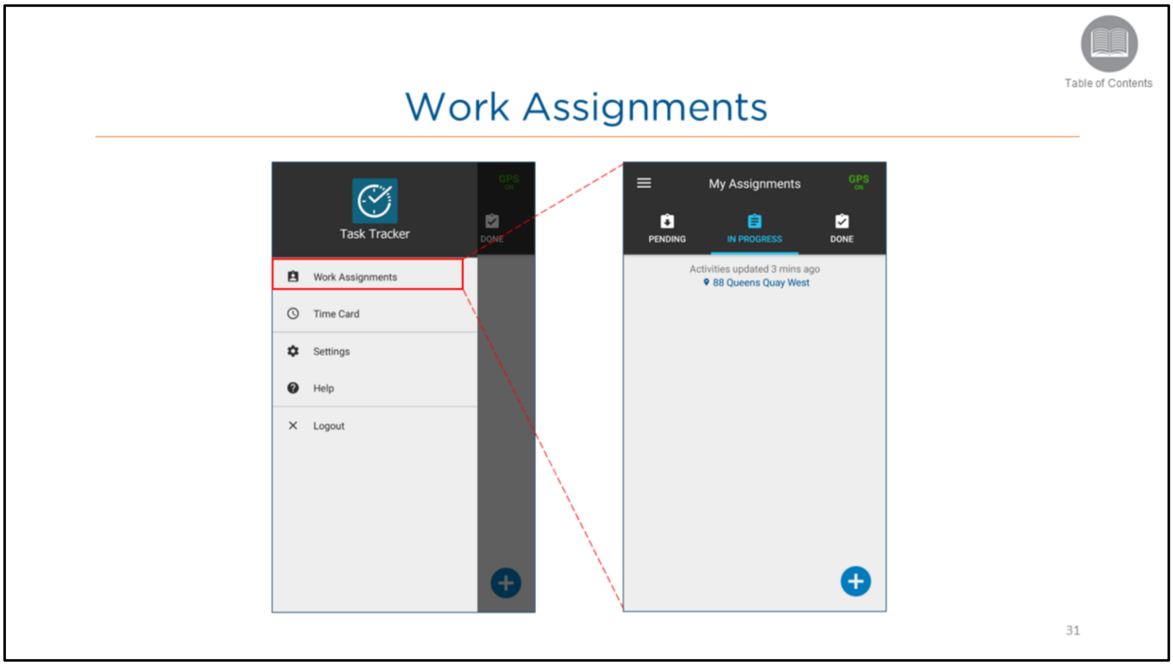
Steps:

1. Log in to the mobile application
2. Tap the **Menu** icon in the upper left corner



Overview:
- To promote ease of use, the resource can use the **Main Menu** to quickly access different areas of the Mobile Application.

The Main Menu includes the following sections:
- **Work Assignments:** directs the resource to the My Assignments screen, In Progress tab
- **Timecard:** allows the resource to change their work status and keep the dispatcher informed as to their availability
- **Settings:** directs the resource to their app settings
- **Help:** directs the resource to the online help system
- **Logout:** allows the resource to log out of the Mobile App

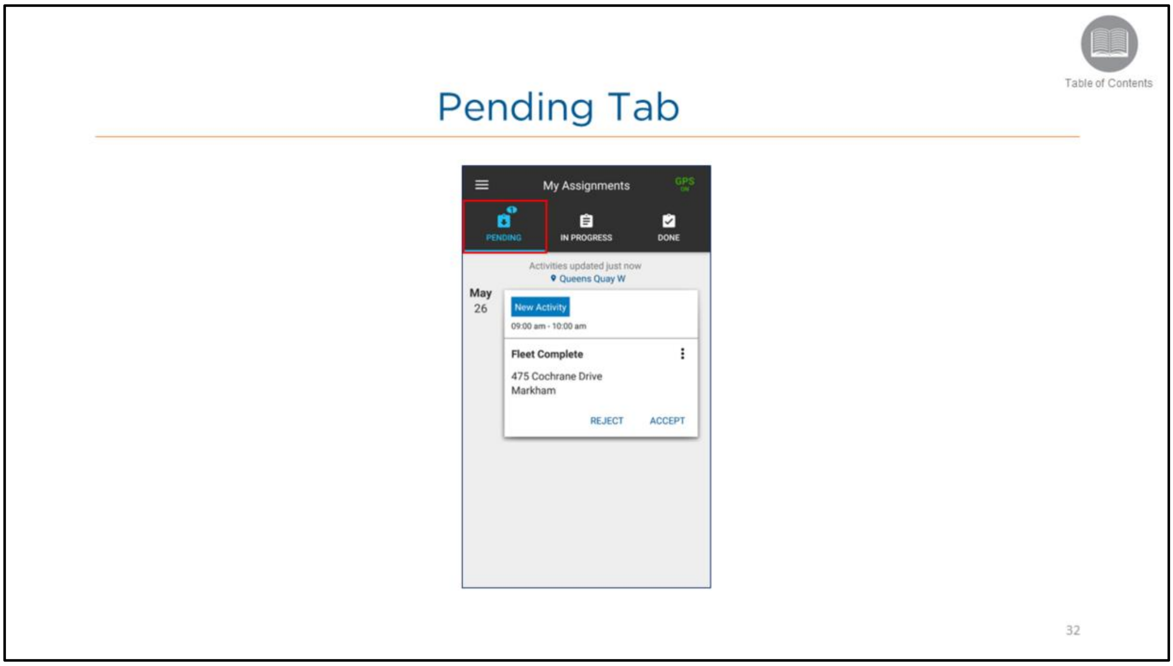


Overview:

- Tapping **Work Assignments** directs the resource to the My Assignments screen, In Progress tab which lists all the activities that are pending, in progress and have been completed.
- This also displays the number of activities in each tab, the last time the list was updated, and the resource's current location.

Steps:

1. From the main menu, select **Work Assignments**
2. Tap the corresponding tab to view activities
3. Tabs include: Pending, In Progress, and Done

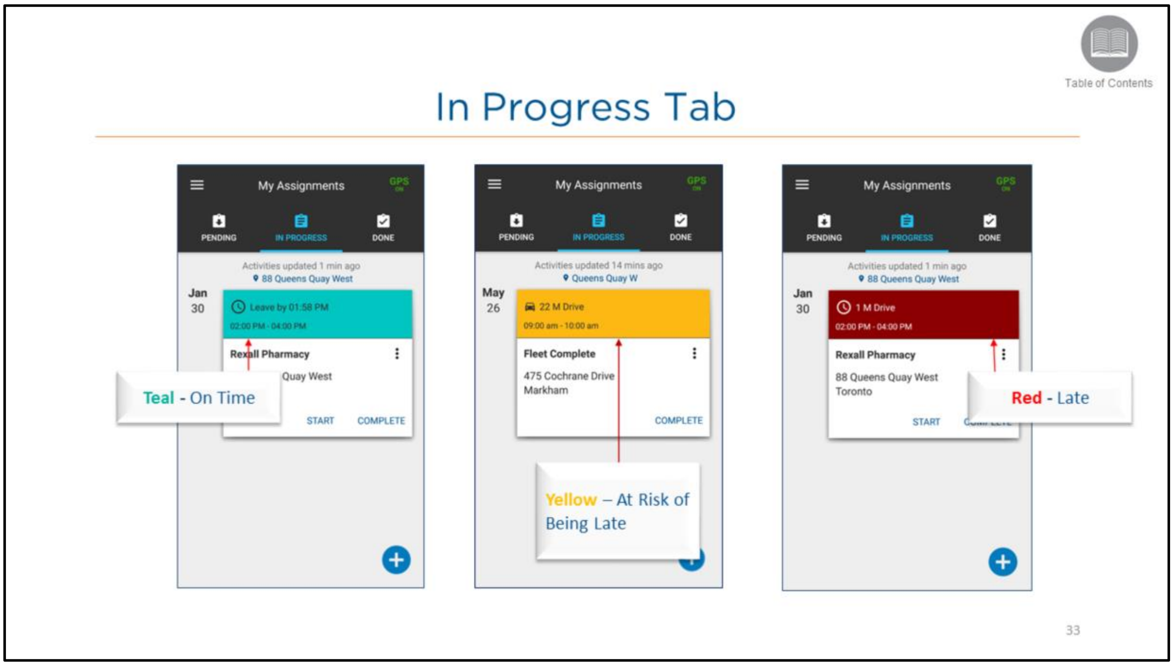


Overview:

- The **Pending** Tab lists all the activities that have been dispatched and are waiting for the resource to either Accept or Reject.
- The number of unread new activities will be indicated next to the pending icon.
- The activities are sorted by start date, time and address.
- If two or more activities have the same start date, the activities will be sorted by time.
- If the date and time are the same, the activities will be sorted alphabetically by address.
- The label name of **“New Activity”** indicates that it has not been viewed by the resource.
- When the resource **Accepts** an activity it moves to the *In Progress* tab.
- When the resource **Rejects** an activity it no longer displays in the Mobile Application and is sent back to the Desktop Application to be re-dispatched.

Steps:

1. From the main menu, select **Work Assignments**
2. Select the **Pending** tab
3. Tap **Reject** or **Accept** within the new activity

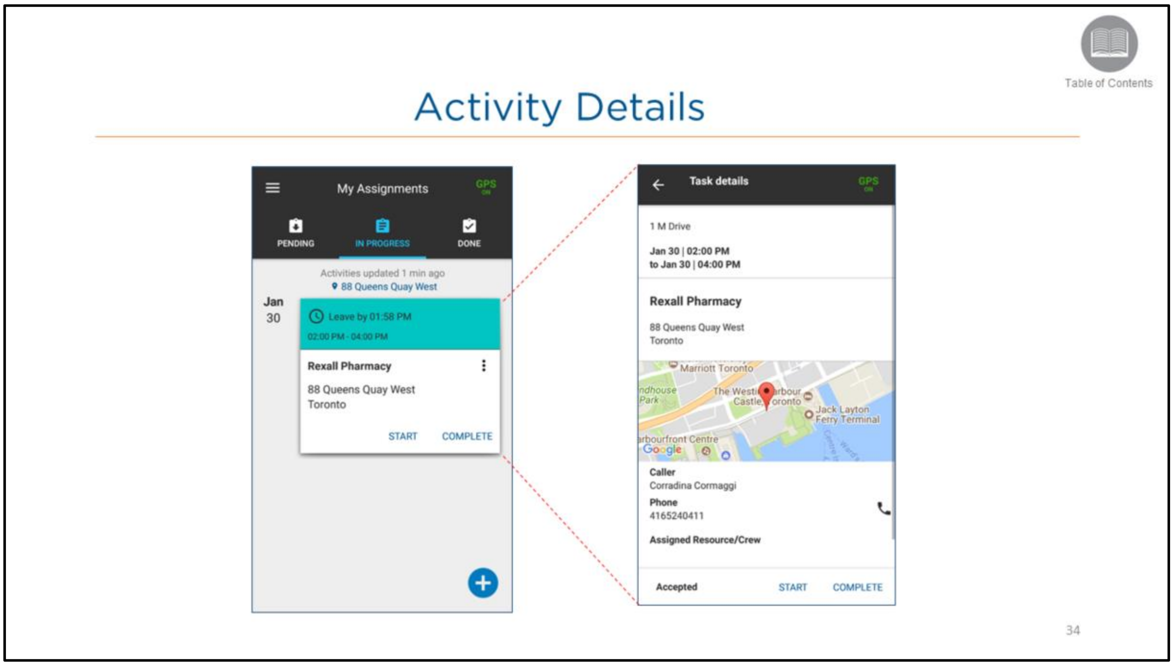


Overview:

- The **In Progress** Tab lists all the activities that are currently being processed by the resource.
- The activities are sorted by the starting date and time.
- If two or more activities have the same start date, they will be sorted by time.
- If the date and time are the same, they will be sorted alphabetically by address.
- If travel time estimates is turned on from the mobile apps settings>travel options, the upper portion of the activity will be highlighted in different colours indicating the following:
    - Teal– On Time
    - Yellow – At risk of being late
    - Red - Late
- The upper portion of the activity will include the amount of time you will need to reach your destination, from your current location.

Steps:

1. From the main menu, select Work Assignments
2. Select the **In Progress** tab



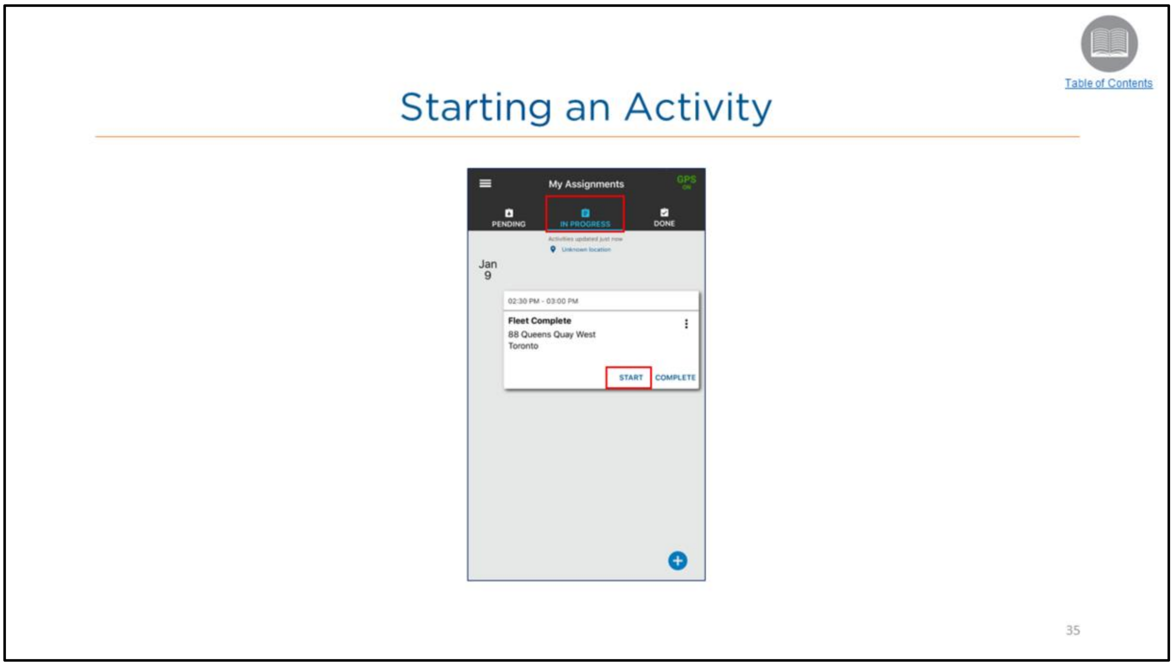
Overview:

Each activity contains the following information:

- Start date and time
- End date and time
- Name of activity
- Reference Number
- Address
- Directions
- Name and phone number of the contact
- Activity instructions
- Location Notes
- Current status of the activity
- and the ability Start, Complete, Pause and Resume an activity depending on its current status

Steps:

1. From the **In Progress** tab, tap the Activity to view the details

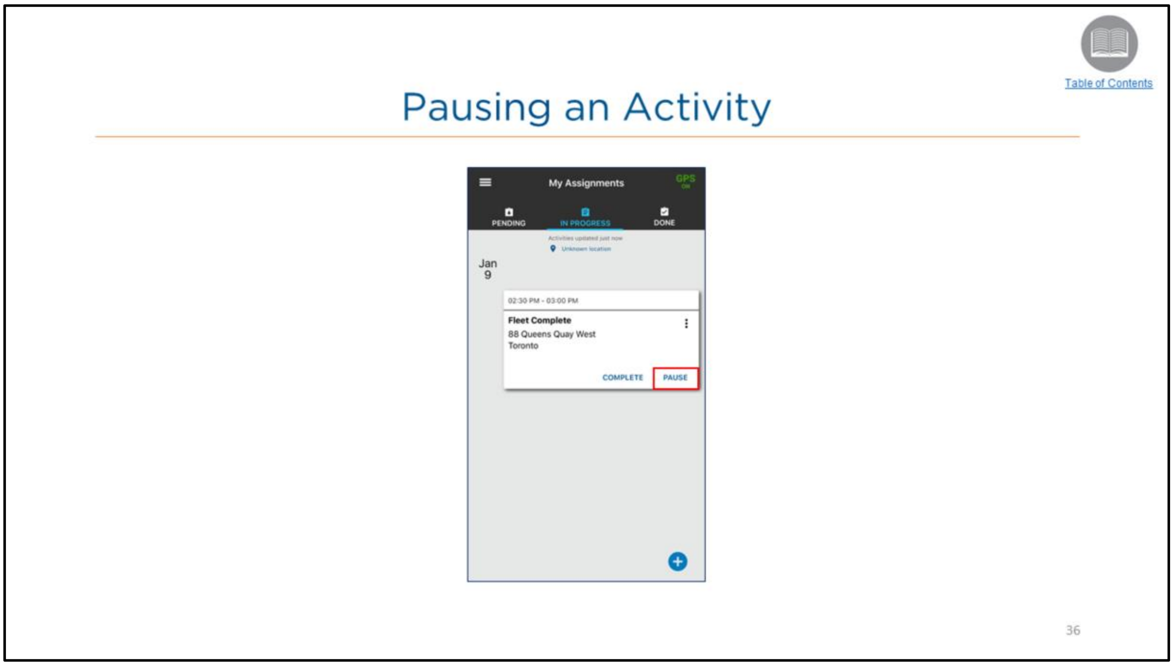


Overview:

- Once an activity has been accepted, it moves to the *In Progress* Tab.
- From this tab, the Mobile Worker can **Start** and **Complete** the activity.

Steps: Starting an Activity

1. Select the **In Progress** tab
2. Tap the activity
3. Tap the **START** button

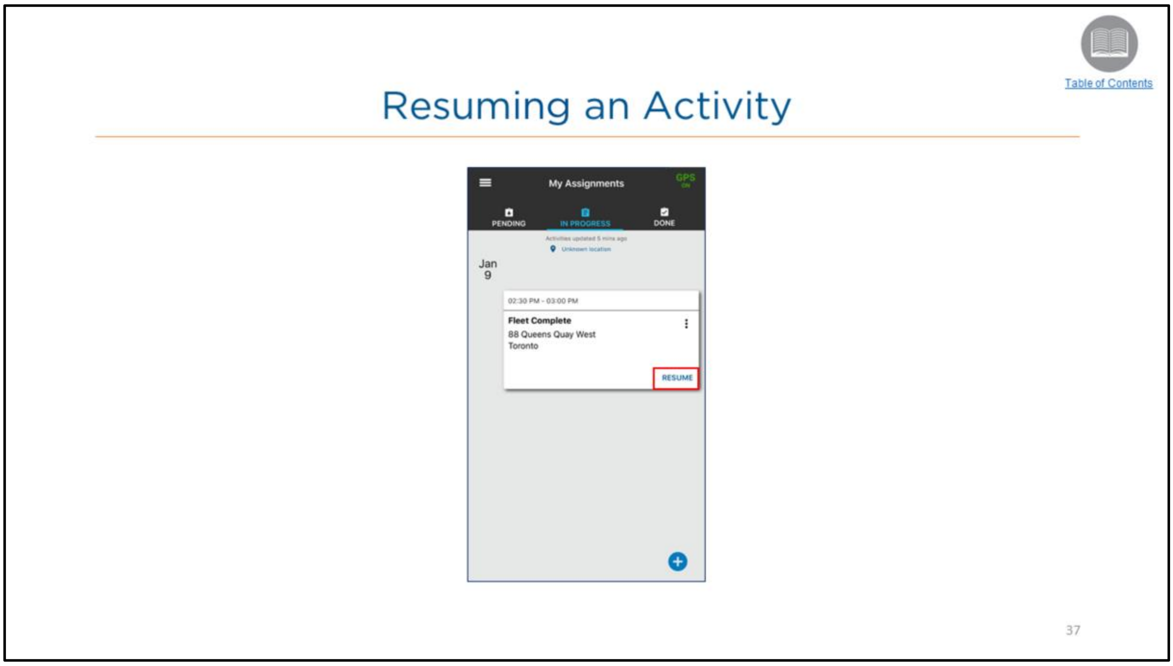


Overview:

- When an activity is **started** the Mobile Worker can choose to **Pause** and **Complete** the activity.

Steps: Pausing an Activity

1. From the *In Progress* tab, tap the started activity
2. Tap the **PAUSE** button

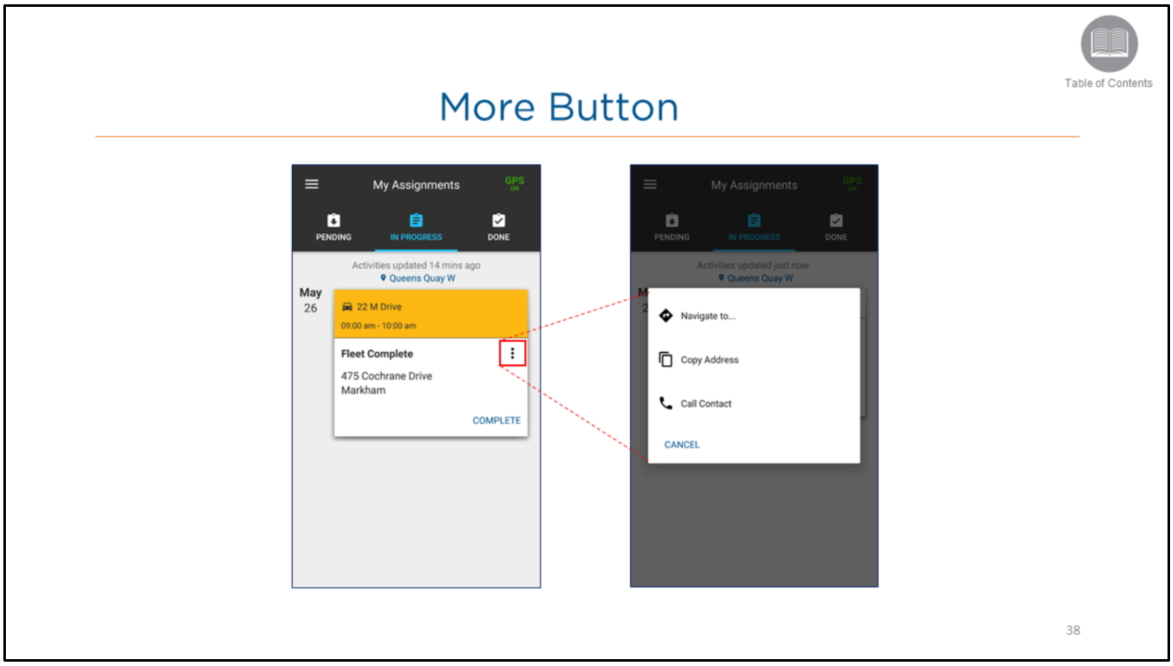


Overview:

- When the activity is **Paused,** the Mobile Worker can **Resume** the activity.

Steps: Resuming an Activity

1. From the *In Progress* tab, tap the Paused activity
2. Tap the **RESUME** button

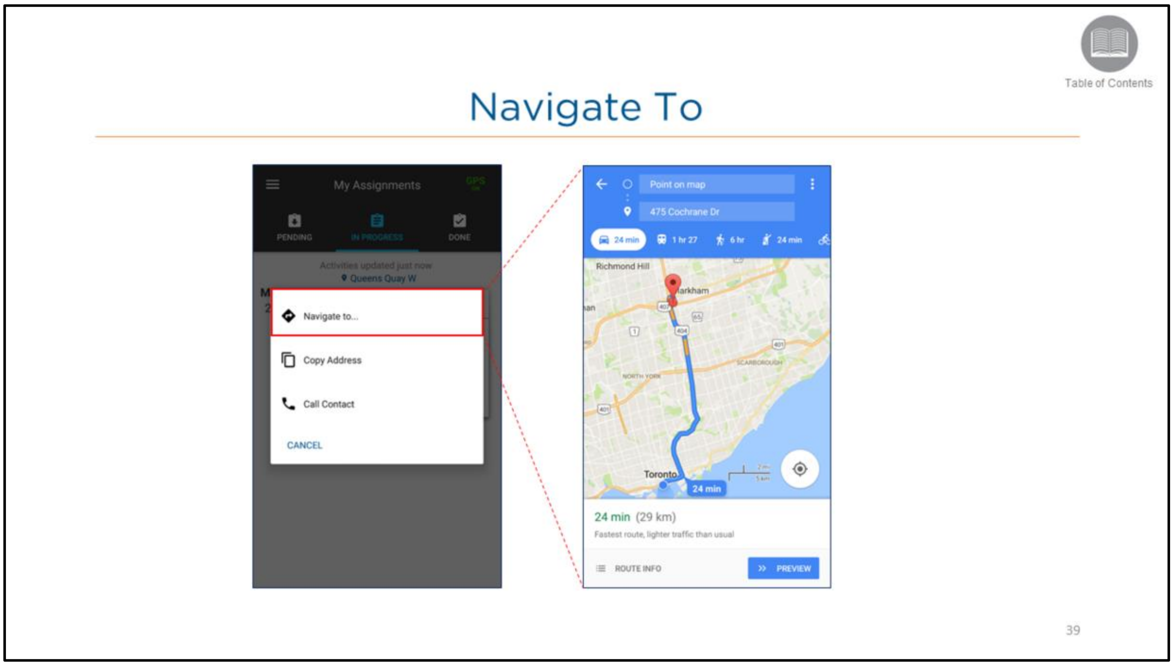


Overview:

- The *More* button found in the Pending and In Progress tabs, it's located within the activity and it contains additional functionality.

Steps:

1. From the activity, tap the **More** button

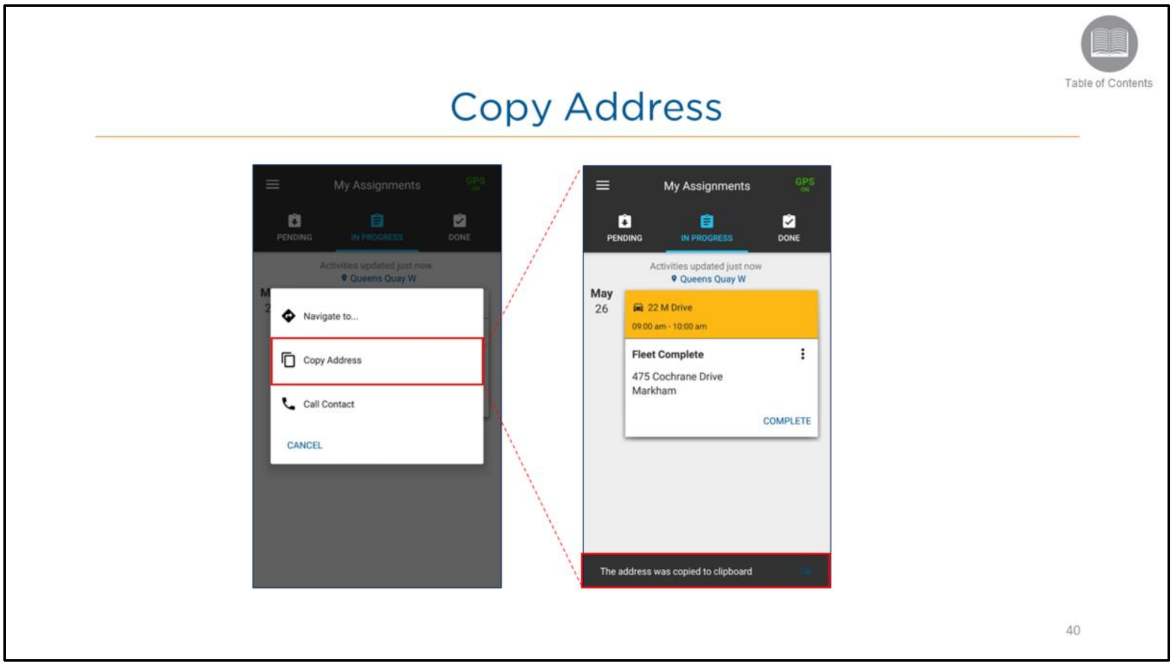


Overview:

- The *Navigate to* function opens the default map navigation on the device, and provides direction from the current location to the activity's location.

Steps:

1. From the More button, tap **Navigate to**

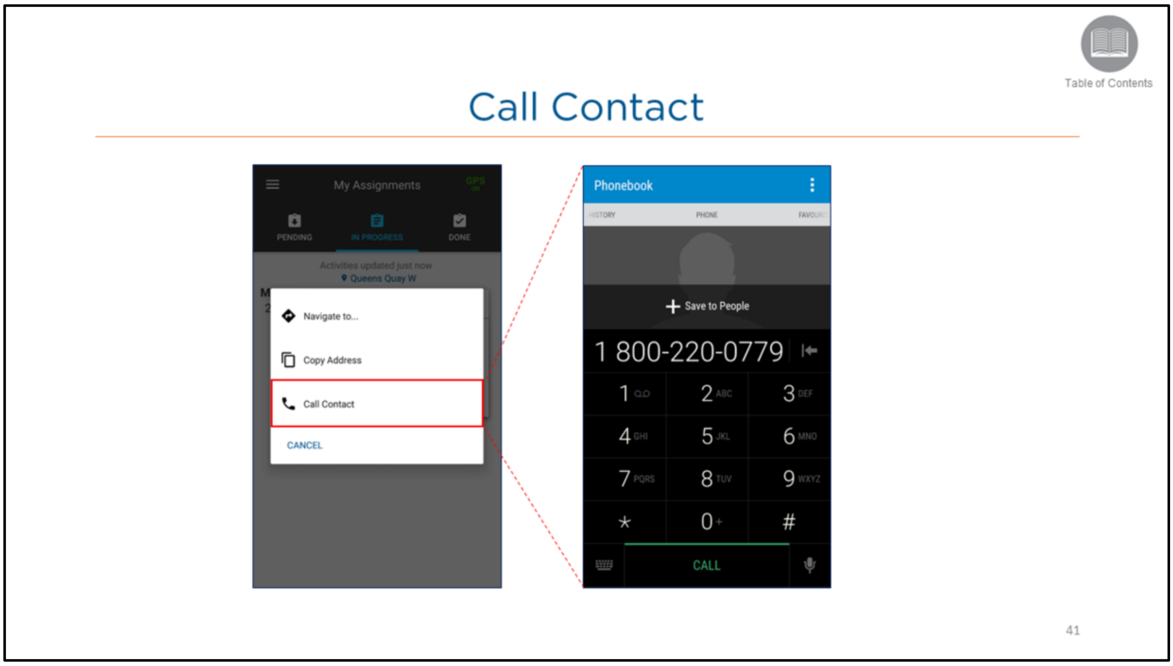


Overview:

- The *Copy Address* function copy's the activity's address to the device's clipboard, which can be used later on when needed.

Steps:

1. From the more button, tap **Copy Address**

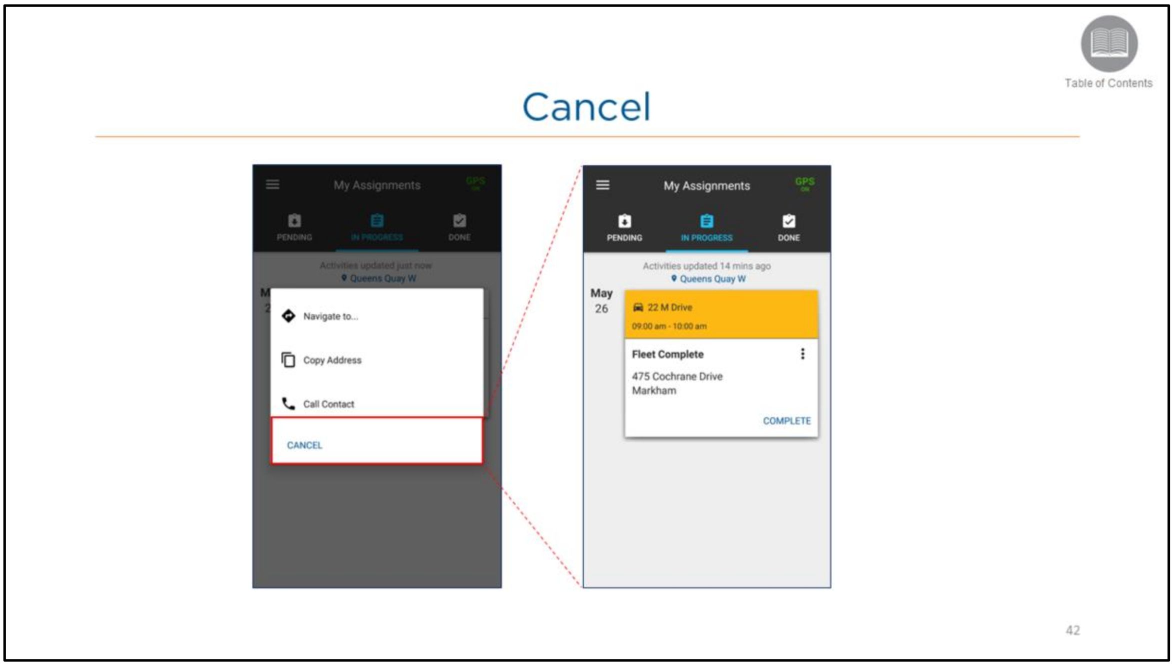


Overview:

- The *Call Contact* function opens the device's dial pad and displays the phone number specified in the activity.

Steps:

1. From the More button, tap **Call Contact**



Overview:

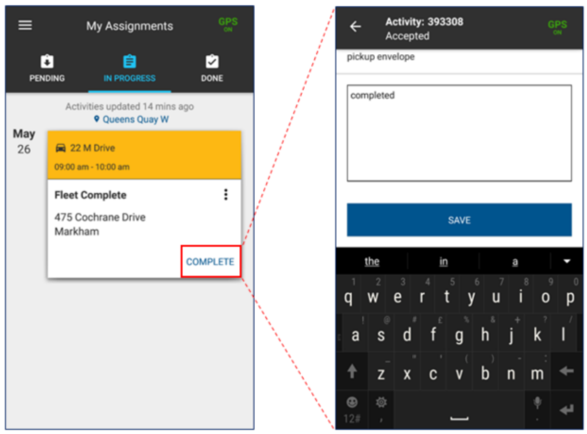
- The *Cancel* function returns you to the In Progress tab

Steps:

1. From the More button, tap **Cancel**

Table of Contents

Completing an Activity



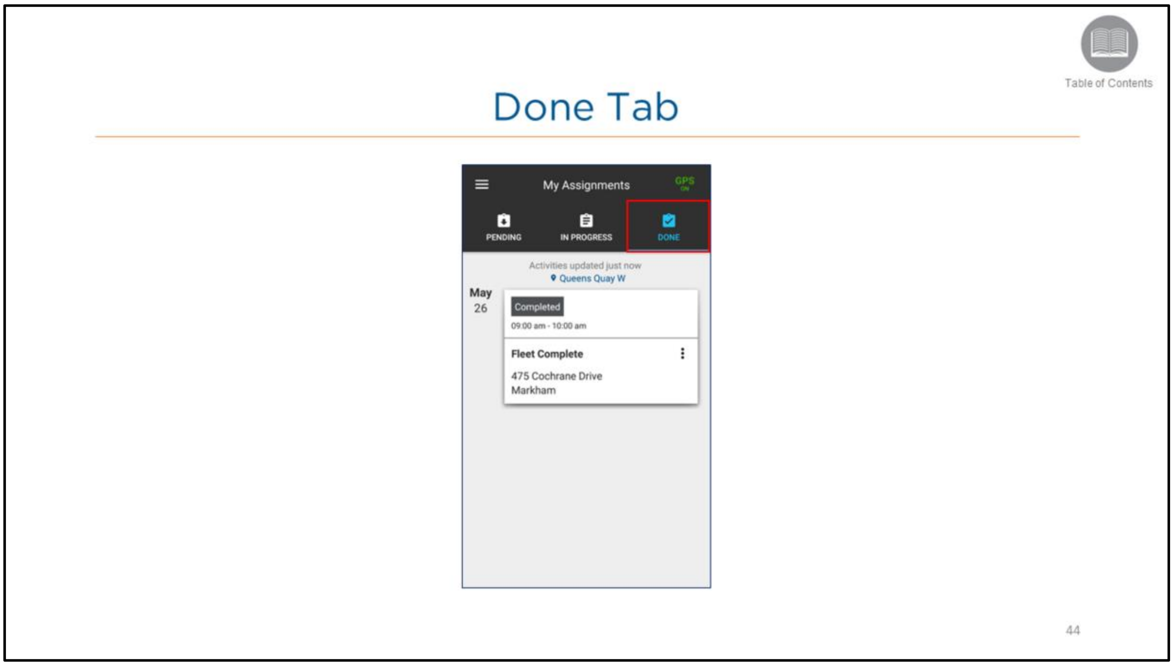
43

Overview:

- Taping the *Complete* button, will move the activity to the Done tab, marking the end of the task.

Steps: Completing an Activity

1. From the In Progress tab, tap the activity
2. Tap the **Complete** button
3. Type in comments
4. tap **Save**

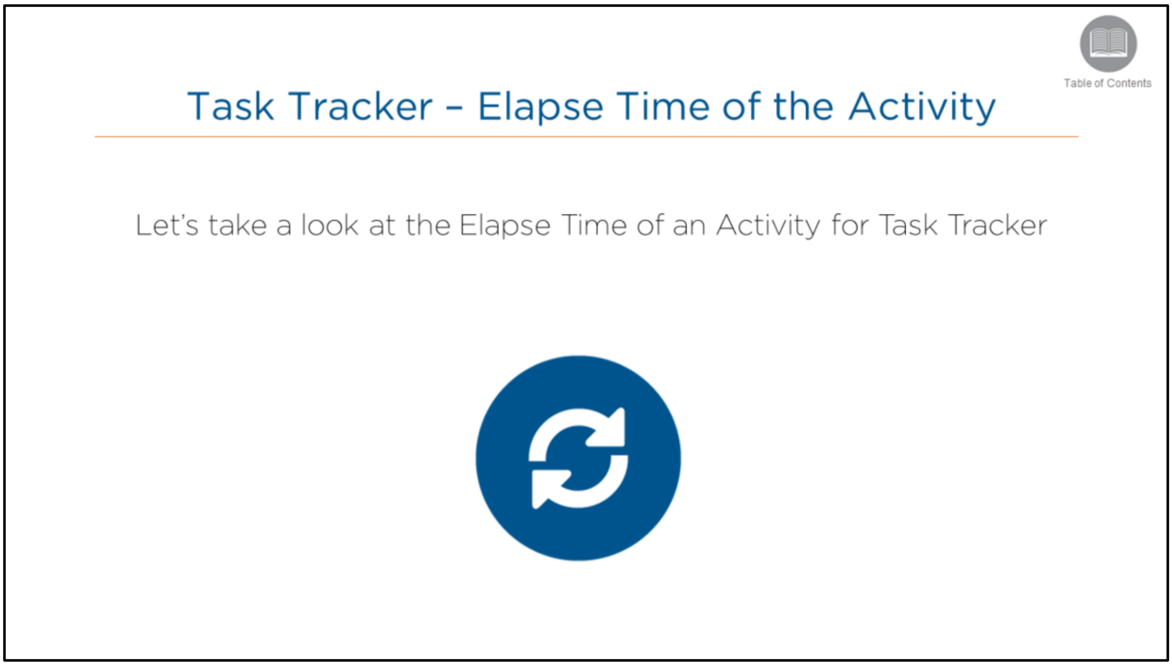


Overview:

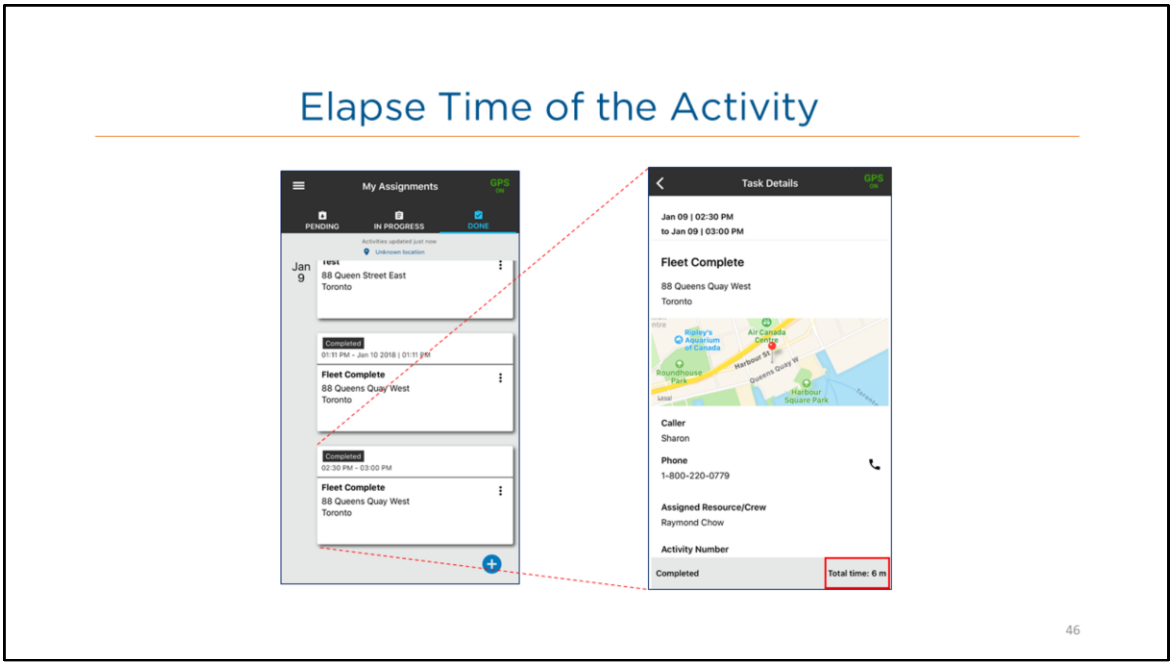
- The *Done Tab* lists all the activities that have been completed on the current date.
- The activities are sorted by start date and time.

Steps:

1. From the main menu, select **Work Assignments**
2. Select the **Done** tab



Overview:
- Read the slide.

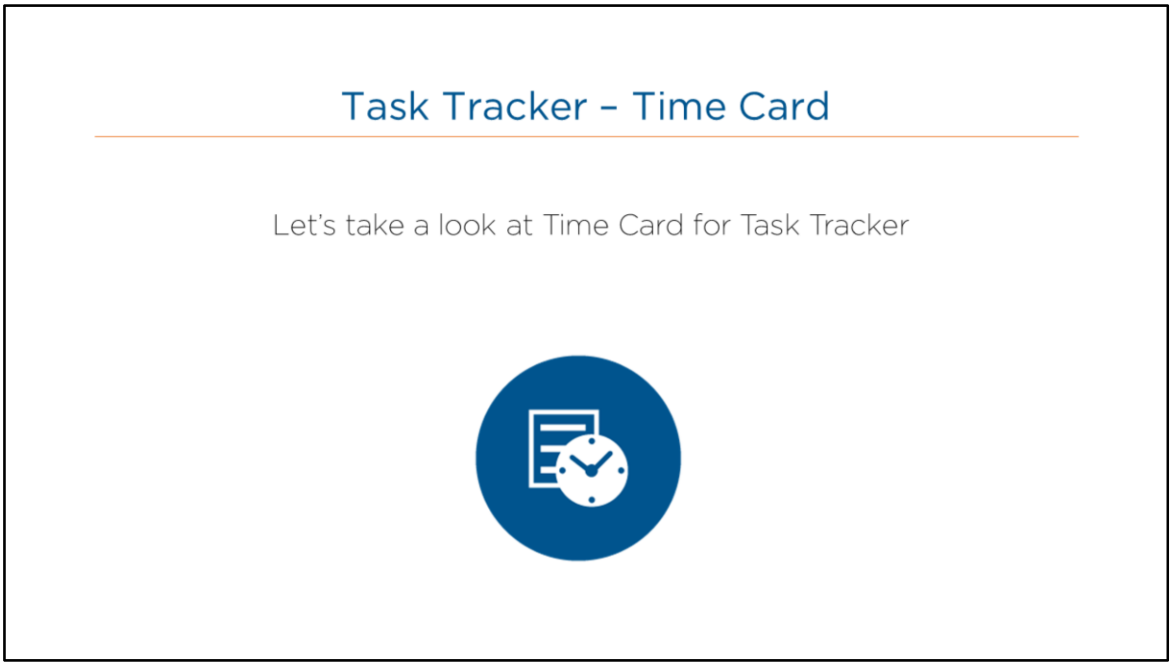


Overview:

- The Mobile Worker has the option to keep track of the time spent on an activity.
- An activity *Elapsed Time* is calculated based on the **actual** time spent working on the activity [**Total Time minus (–) Pauses].**
- Once an activity is completed, the Activity Elapsed Time is displayed in the task details under the Done tab.

Steps: Viewing an Activity Elapsed Time

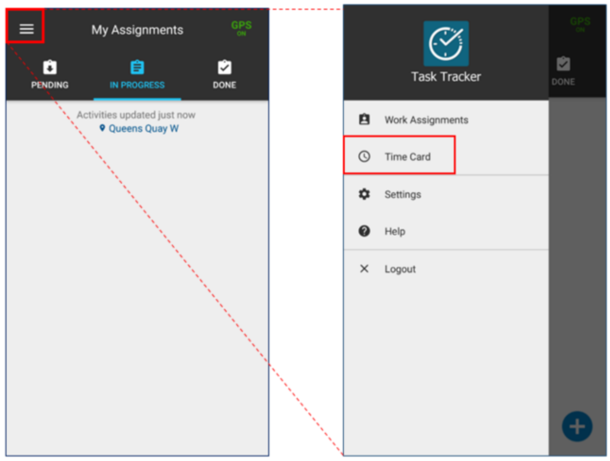
1. From the **DONE** tab, tap an activity
2. View the **Total Time** which is the **Activity Elapsed Time**



Overview:

- Read the slide.

Accessing Time Card



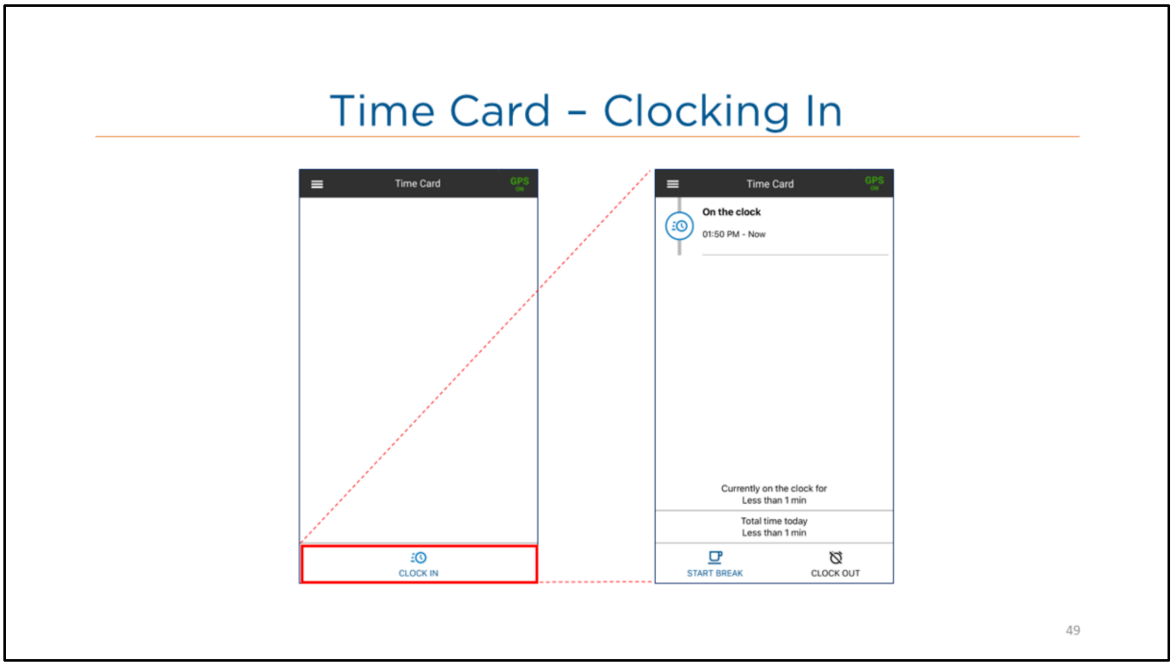
48

Overview:

- Time Card allows the resource to change their work status as well as keep the Dispatcher informed as to their availability.
- Statuses include: Clock In, Start Break and Clock Out.
- The application will automatically Clock Out the resource, and reset the resource's hours daily at 11:59pm.

Steps:

1. On the Work Assignments screen located in the upper left corner, tap the **Menu** icon
2. From the Menu, tap **Time Card**

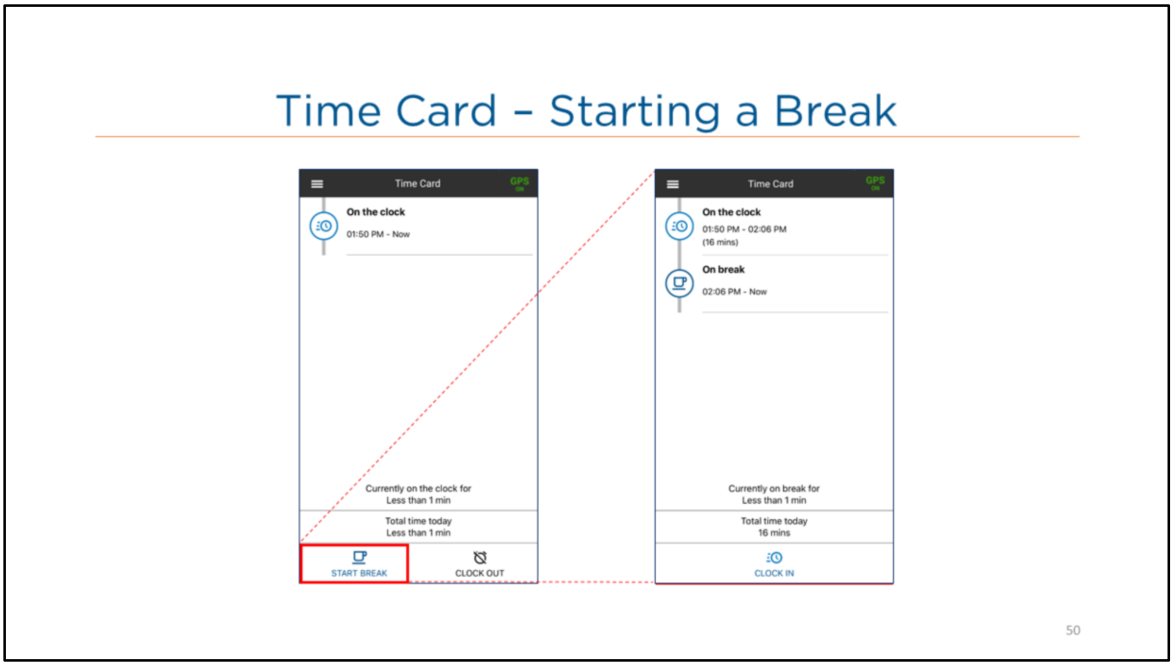


Overview:

- When the resource taps Clock In, the Time Card screen will record the current status and start time.
- ***The Currently on the clock for*** displays the total time for the current status.
- ***The Total time today*** displays the sum of the *Clock In* and *Break* times combined.

Steps: Clocking In

1. From the Time Card screen tap **Clock In**

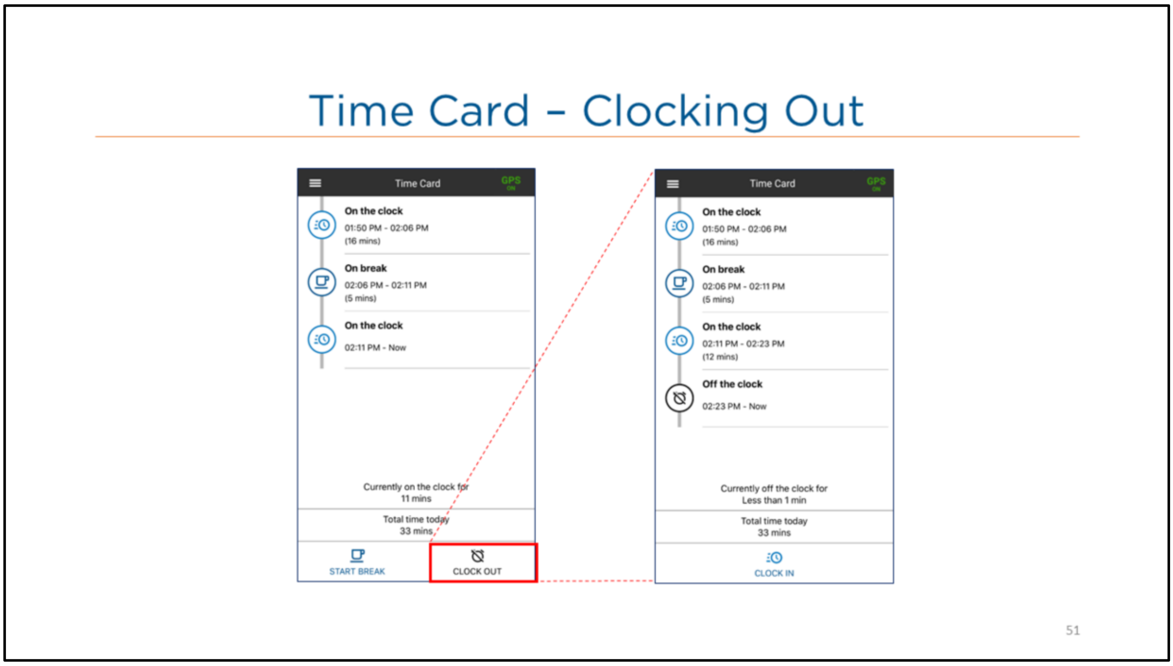


Overview:

- The Resource can tap Start Break to indicate the start of a break.
- From the Start Break status, the available status includes Clock In.
- When the status has changed, the Time Card screen displays the start time and end time of the previous status.

Steps: Starting a Break

1. From the Time Card screen tap **Start Break**

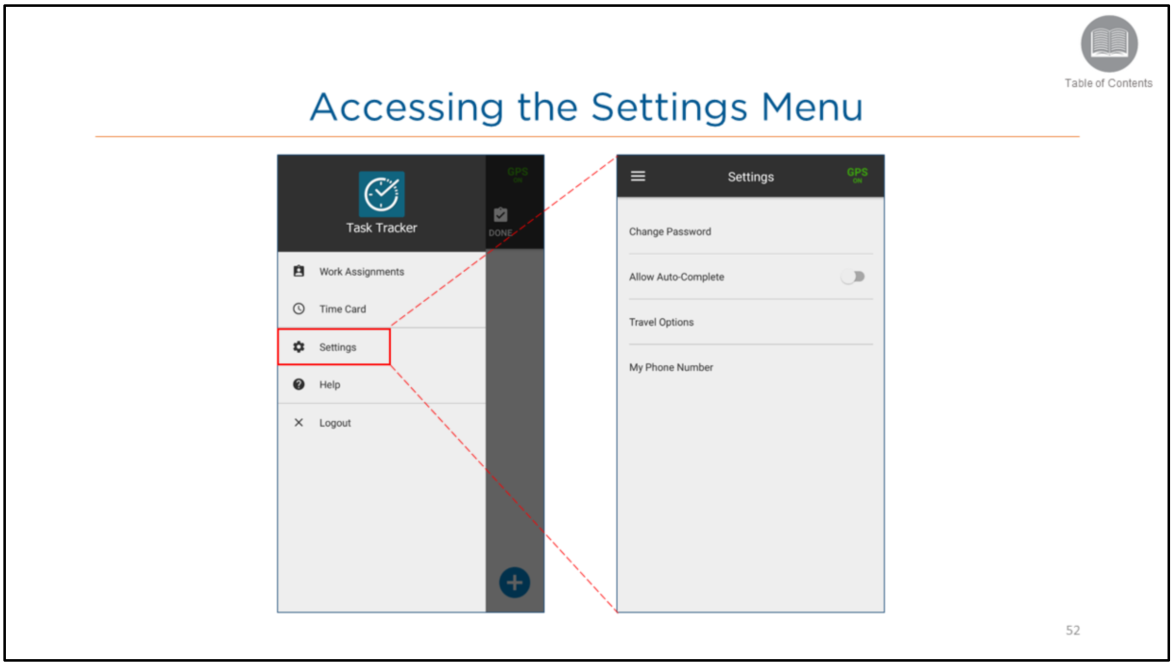


Overview:

- The Resource can tap Clock Out to indicate the end of their work day.
- From the Clock Out status, the available status includes Clock In.

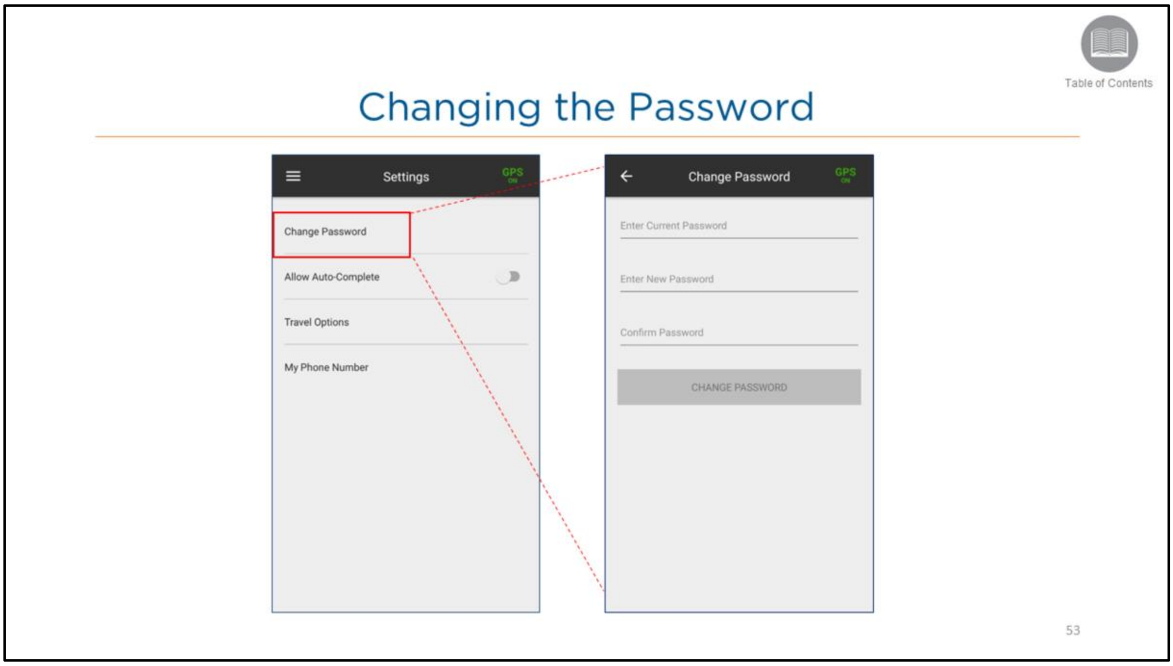
Steps: Clocking Out

1. From the Time Card screen tap Clock Out



Overview:
- The *Settings* menu enables the resource to set up their preferred settings for the mobile application.
- Lets review the options available from the settings menu.

Steps:
1. From the main menu, select **Settings**

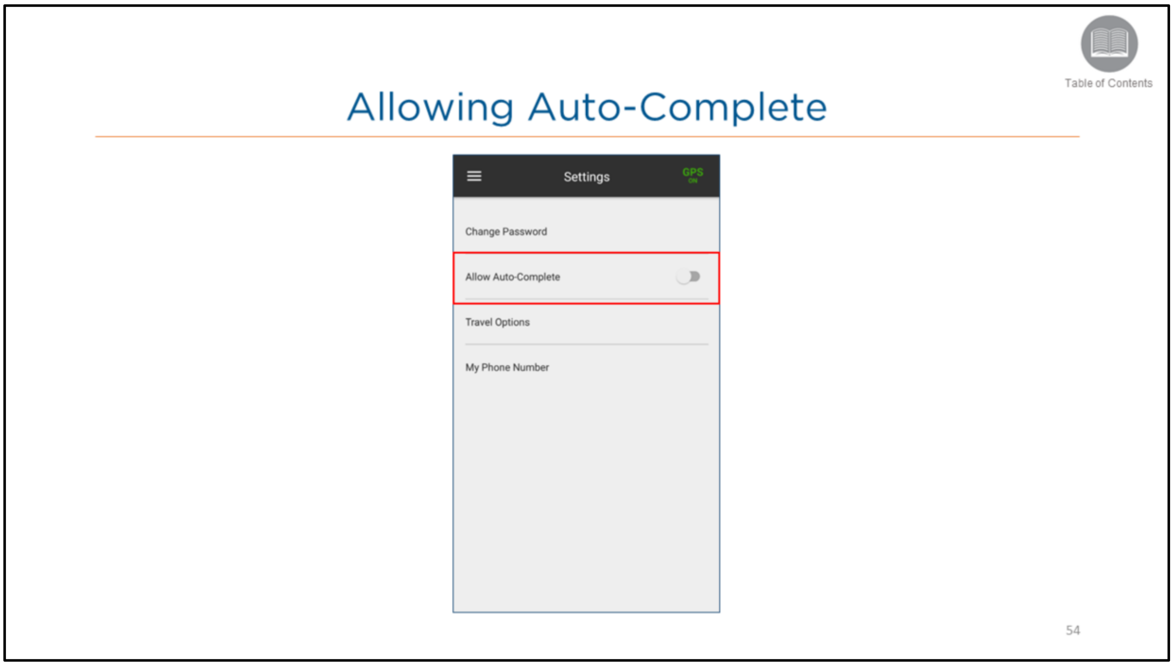


Overview:

- Change password allows the resource to update their password information directly from the mobile application.

Steps:

1. From the *Settings* screen, tap **Change Password**
2. In the Enter *Current Password* field, type the current password
3. In the Enter *New Password* field, type the **New Password**
4. Confirm the resources **New Password**
5. Tap **Change Password** to save the changes

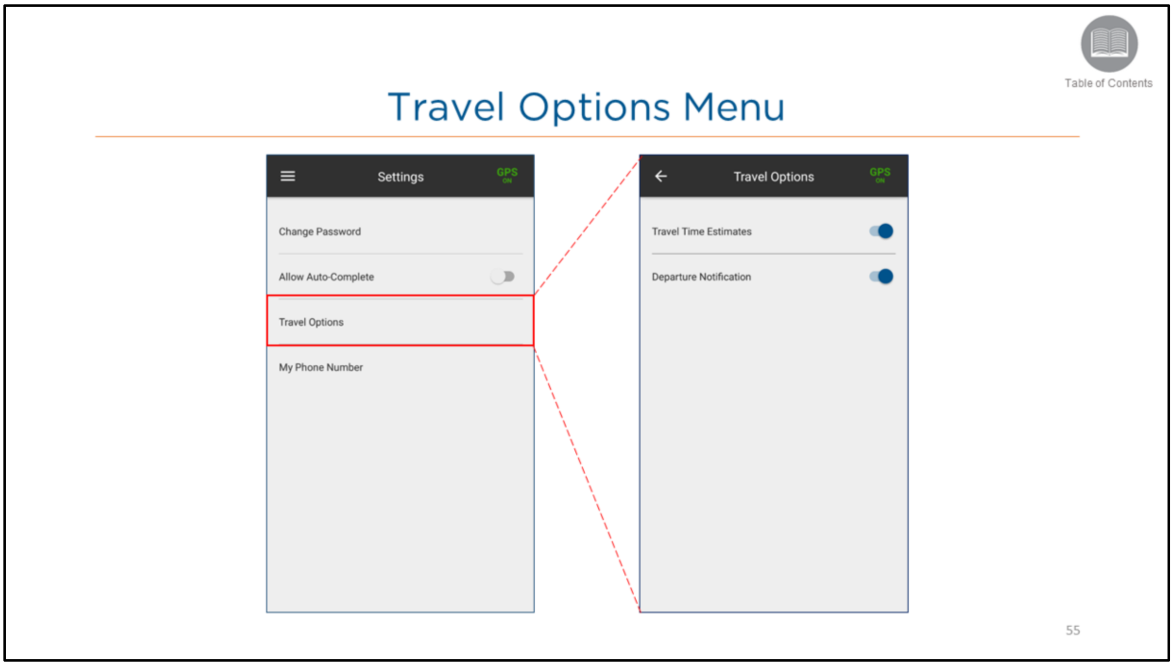


Overview:

- When *Allow Auto-Complete* is turned on and the resource taps the Complete button on an activity, tasks that are In Progress will be moved to the Done tab by skipping the Activity Completion screen.
- When the *Allow Auto-Complete* is turned off the resource will be required to fill out the Activity Completion screen.

Steps:

1. Tap the slider bar to activate or deactivate **Allow Auto-Complete**

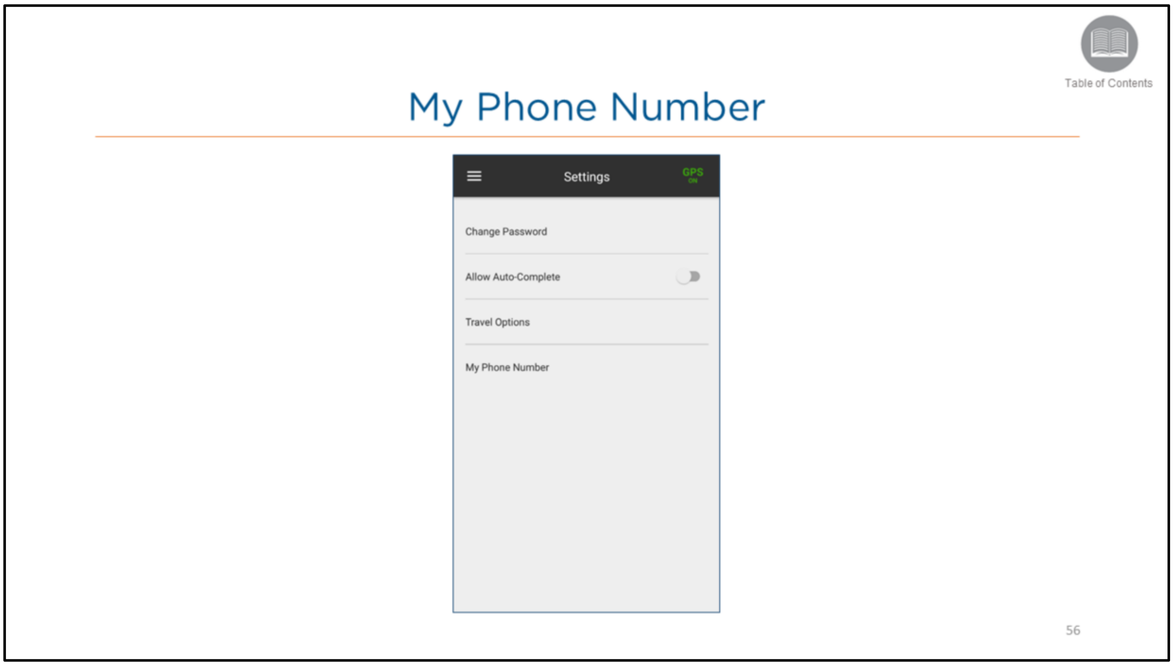


Overview:
- The *Travel Options* menu item enables the resource to set up their preferred settings for navigation purposes for the mobile application.
- This feature includes *Travel Time Estimates* and *Departure Notification*.

- **Travel Time Estimates** calculates the approximate time it will take for the resource to reach their destination from their current location.
- If it is turned on, the travel time is calculated for activities.
- If it is turned off, the travel time is not calculated for activities.

- **Departure Notification** is an alert that informs the resource when to leave in order to arrive on time for the activity.
- If it is turned on, an alert will inform the resource when to leave.
- If it is turned off, no alerts will be sent.

Steps:
1. From the main menu, select **Travel Options**
2. Tap the slider bar to activate or deactivate **Travel Time Estimates**
3. Tap the slider bar to activate or deactivate **Departure Notification**

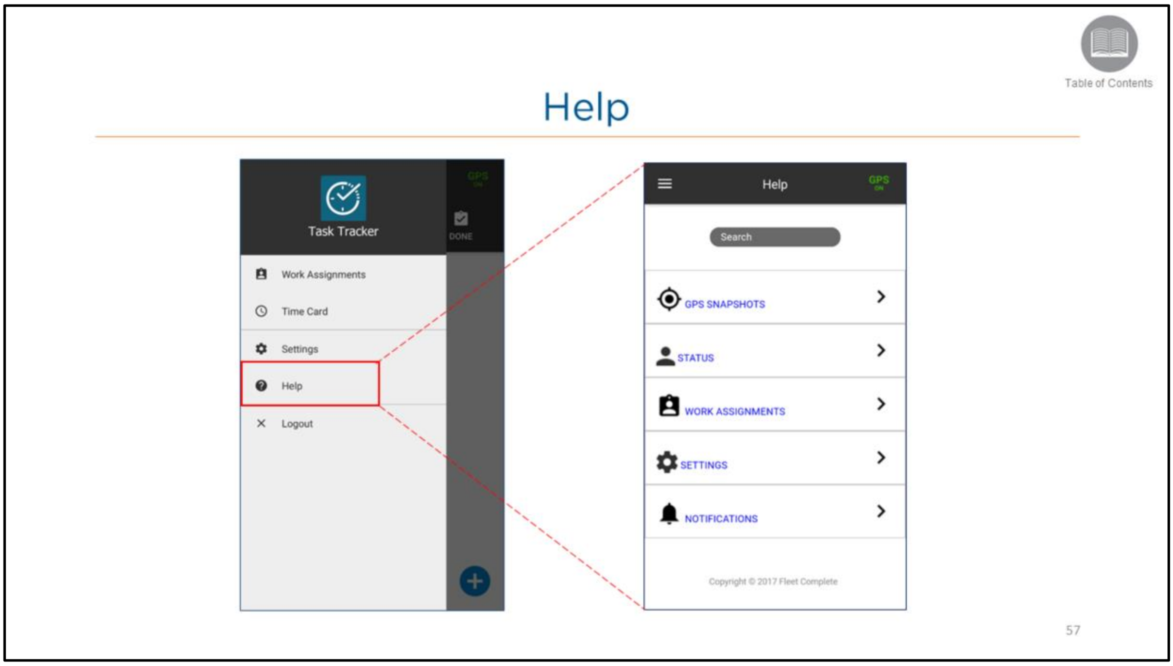


Overview:

- The *My Phone Number* feature enables the resource to view and edit the current phone number if necessary.
- If the phone number entered is stored in your Fleet Complete Desktop or Web Application, you will see a **GPS ON** icon in the heading bar. Otherwise, you will see **GPS OFF**.

Steps:

1. From the main menu, tap **My Phone Number**
2. Type in the phone number that matches a number currently stored in your Fleet Complete application
3. Tap **Save**

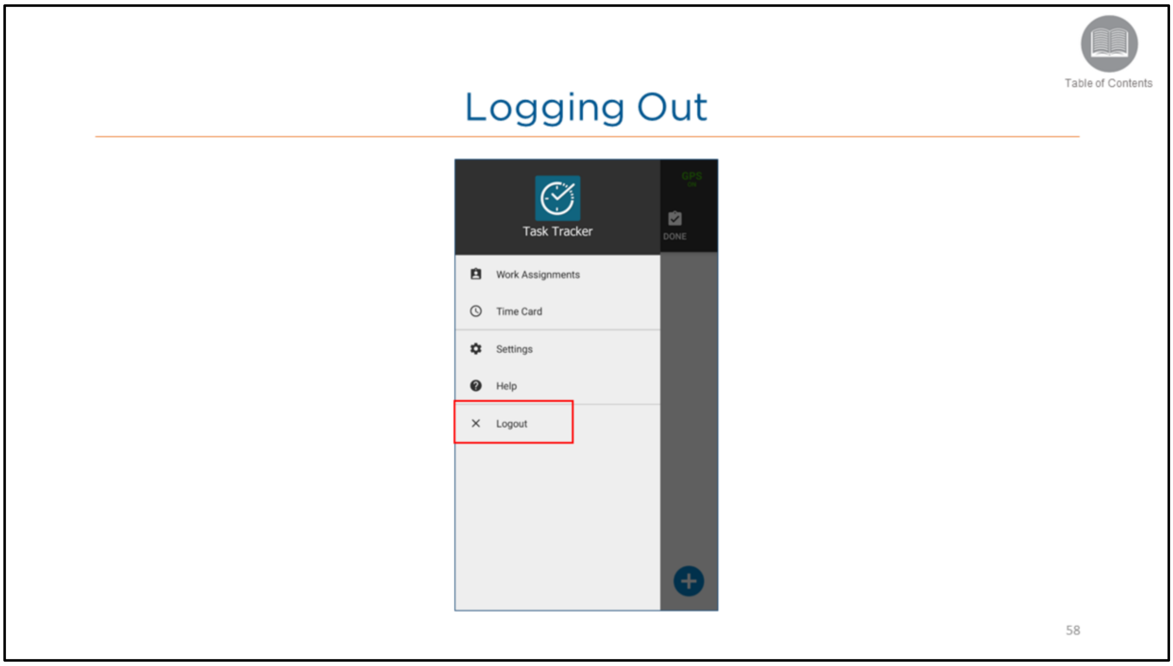


Overview:

- The Help menu item accesses the mobile application's online help system.
- This system provides you with a dynamic table of contents that is organized by the main functionality of the Mobile application.
- Tap a subject to access and expand the available content explaining how to use the functionality.

Steps: Accessing the Online Help

1. From the main menu, tap **Help**
2. Tap the corresponding section that you want more information about

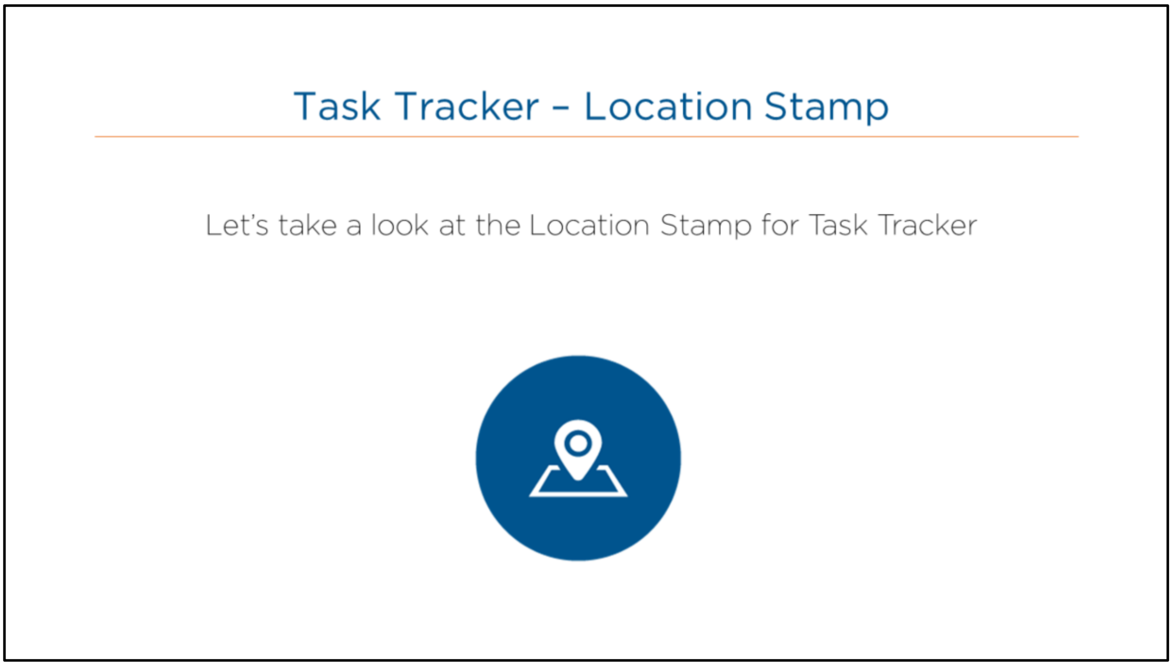


Overview:

- The resource can log out from the Mobile Application by navigating to the main menu and selecting the **Logout** menu item.
- Once logged out, the application then navigates the resource back to the Login screen.

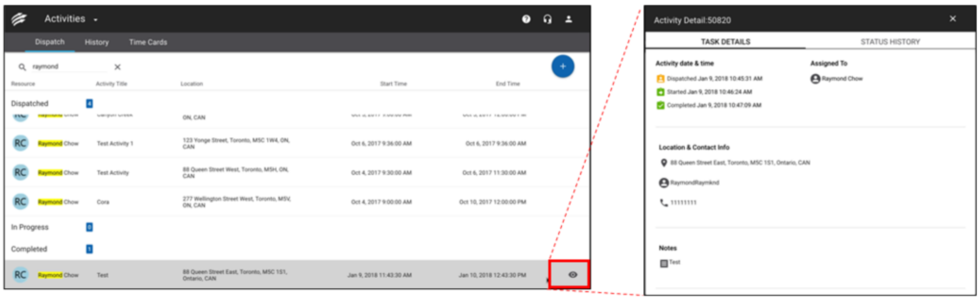
Steps:

1. From the main menu, tap **Logout**



Overview:
- Read the slide.

Activity Status – GPS Positions



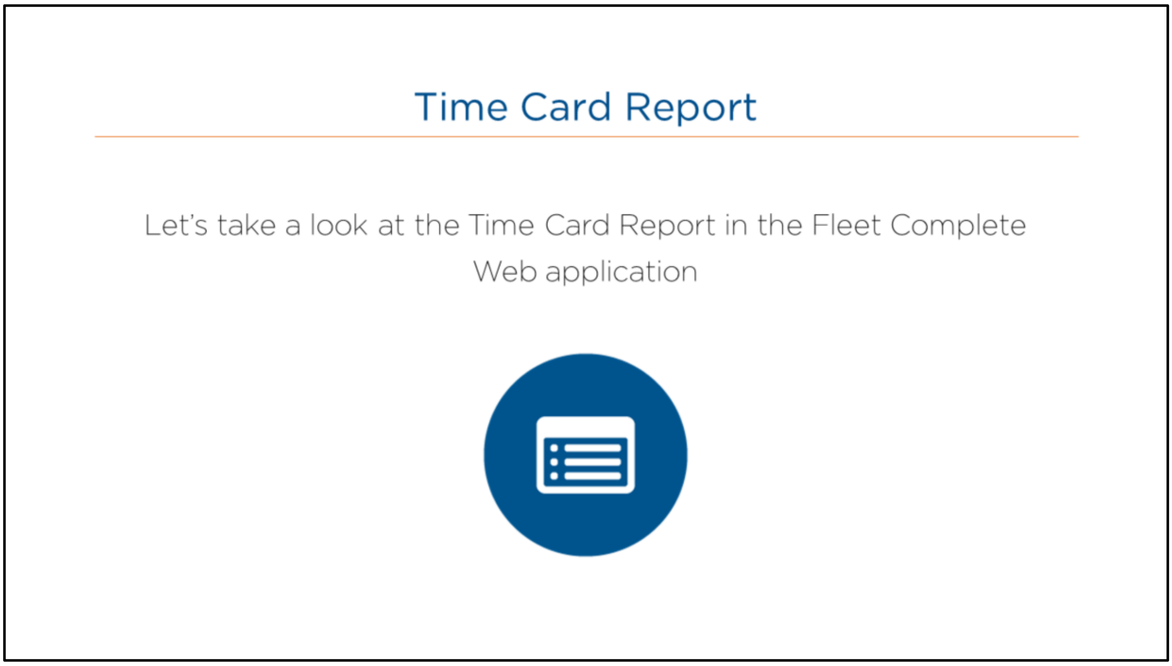
60

Overview:

- Activity Status GPS Positions are important to ensure that an activity is done at the right location.
- Every time a Mobile Worker updates an activity status, Task Tracker will record the **GPS location** of the **status change**.
- GPS locations are visible from FC Web in the Activity History Timeline.

Steps: Viewing Activity Status GPS Positions in **FC Web**

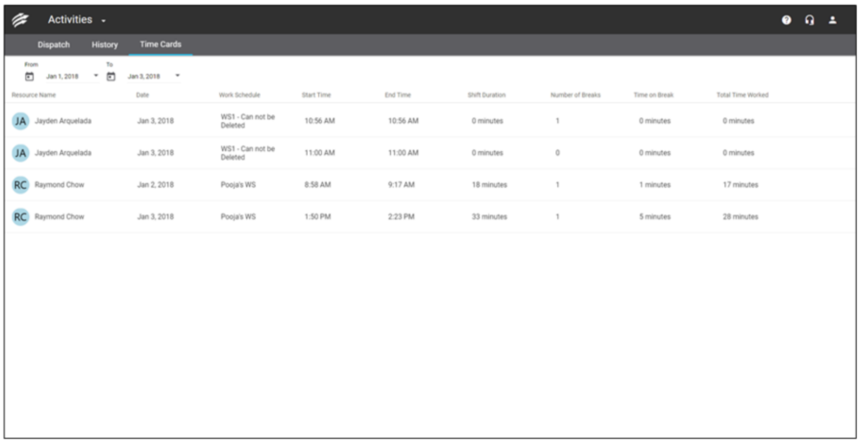
1. From the Main Menu, select **Activities**
2. Select the **Dispatch** tab
3. Type in Criteria in the **Search** field
4. Click the **Eye icon** located to the right of the completed activity
5. The results will display in the Activity Detail window



Overview:

- Read the slide.

Time Card Report, cont'd…



Overview:

- The Time Card report displays a list of all the Resources, as well as a breakdown and a summary of their work schedule.
- **FC Desktop** users can continue to use the Time Card Report which displays: login/logout times, time worked, number of breaks and time on break for Mobile Workers.
- You can retrieve twelve months' worth of historical data; however, you can only query 30 days of data at a time.
- The Time Card Report is also accessible from **FC Web**.

- The Time Card Report includes the following Columns:
    - Resource Name
    - Date
    - Work Schedule
    - Start Time
    - End Time
    - Shift Duration
    - Number of Breaks
    - Time on Break
    - Total Time Worked

Steps: Accessing the Time Card Report from **FC Web**

1. From the Main Menu, select **Activities**
2. Select the **Time Cards** tab
3. Select the **From** and **To** date range by clicking on the corresponding calendar icon or dropdown arrow

Thank You!