

Quick Reference Card

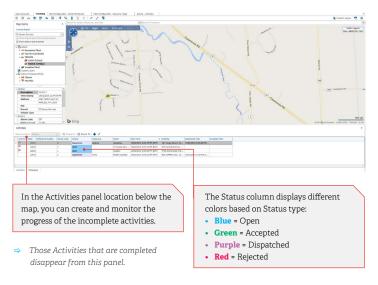
Working with Activities

ABOUT ACTIVITIES

The **Activities** module in Fleet Complete is applicable if you have the **Action Tracker Resource** or the **Garmin Integrated** solutions. Activities are tasks, like a service call, that need to be done at a specific location, assigned to a resource and then monitored in terms of their progress.

ACCESSING ACTIVITIES

Activities can accessed in different areas of the Fleet Complete application, beginning with the **Tracking** Screen.



CREATING AN ACTIVITY

To create an activity from the **Tracking** Screen, follow these steps:

1. From the Activities panel below, click the 🕈 on the toolbar above.

Result: the Activity dialogue box displays.

 In the Locations field, type in the first few characters of the POI you want to use as destination.

Result: A list of POIs matching your criteria displays. Simply click the POI you want to apply to this Activity.

| cation Information | | | Map Location & Assignment | ent Informat | 991 | |
|---|---|-----|---|-------------------|------------------------|--|
| Locations (Location April) | | + | 0 * | d Anto | - Bird's aya 🗍 i a | andra (|
| aler | Plane | 180 | \odot | | Bed's aya | oyeday In |
| leferenze | | | :5 > | | J. | |
| ane . | | | | 8/ | | |
| | | | | | 1 1 1 | |
| lawet 12 Nullektor | | | | | | 24 |
| Stawi 12 Nuffeld Dr Stawi Z | Oly Scatteringh | | b bing | 2.86.19 | net frankr 2 200 | 250.yda |
| 12 Nu/Held Dr Elevent 2 Yestaki2tp Code | Scarboraugh Province/State | | • From Date/Time | 2 XIE 19 (857) | | |
| 12 Nu/Held Dr Elevent 2 Yestaki2tp Code | Scarboraugh | | | | ment Granvin - 9 200-1 | in our |
| 12 Nu/Hold Dr Deeret 2 Notal/Dp Code 412 Dr4 | Scarboraugh Prevarue/State Ontario Country | | • From Date/Time | (817) ¥ | To Date/Time | 9182 0.40 (051 (4) (4) (4) |
| 2 Nullisia Dr Breef 2 Makilite Code 102 1915 | Scarboraugh Neuvine,State Ontario | | From Date/Time 15/02/2015 2:09 PM | (887) | • Te Oate/Time | 9182 0.40 (051 (4) (4) (4) |
| to turbed to Receit 2 Installitie Code 412 1945 County/Region | Scarboraugh Prevarue/State Ontario Country | | From Date/Time 15/00/2015 2:109 PM Assigned Service Grou Status | (817) ¥ | To Date/Time | gst gst Des |
| to turbed to Receit 2 Installitie Code 412 1945 County/Region | Scarboraugh Prevarue/State Ontario Country | | Fram Date/Time 15(02)(2015 2:09 PM Assigned Service Group | (817) ¥ | To Date/Time | 9182 0.40 (051 (4) (4) (4) |
| to turbed to Receit 2 Installitie Code 412 1945 County/Region | Scarboraugh Prevarue/State Ontario Country | | From Date/Time 15/00/2015 2:109 PM Assigned Service Grou Status | (817) ¥ | To Date/Time | prez sko gsr (w Deen X |
| | Scarboraugh Prevarue/State Ontario Country | | Fran Date/Time SR0(2015 2:10 PM Assigned Service Grou Status Deen | (817) ¥ | To Date/Time | gst gst Des |

- **3.** If this address does not relate to a POI, click the **•** to the right of the **Locations** field and complete the address fields as required, starting with providing a **Name** for the destination.
- **4.** In the ***To Date Time** field to the right of this window, select the date this activity is to be completed by.
- **5**.In the ***Assigned Resource/Crew** field, select the resource to perform this task.

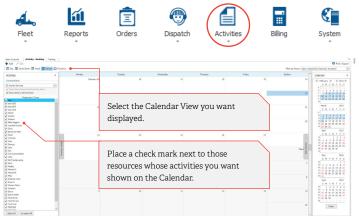
Result: The *Status* field below will automatically change from Open to Dispatched.

- **6.**In the **Activities Instructions** box, you may enter helpful instructions, as required.
- 7. Click Save & Close, located at the top left corner of this window to dispatch this task.

WORKING IN THE BOOKING SCREEN

The Booking screen allows a dispatcher to have access to a Calendar to help plan their activities.

1. From the main toolbar, click the Activities icon.



Result: The **Booking** screen displays, which contains:

- A **Resources** panel to the left, listing those resources logged-in to their mobile devices.
- A *Calendar* in the center, showing by default the monthly calendar view. This can be changed by using the day, work week, week, month, or timeline buttons, located on the top left corner of this screen.
- A **Monthly Calendar** panel to the right, of the current and next four months, with holidays marked.
- **2.**To create an activity from the **Booking** screen, right-click on the day you want to schedule an activity.
- 3. From the contextual menu, click the Add Activity option from the list.

Result: The Activity dialogue box displays.

- Complete the details of the Activity as explained in the previous section 'Creating an Activity'.
- 5. Click Save & Close .

W

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.

| Go to This Day | |
|-------------------|---|
| Go to Today | |
| Go to Date | |
| Change View To | • |
| Group by None | |
| Group by Date | |
| Group by Resource | |
| | Go to Today Go to Date Change View To Group by None Group by Date |

🛉 Add Activity

TO LEARN MORE ABOUT ACTIVITIES

To learn more about **Activities**, click the **?** button from the **Quick Access** toolbar located at the very top left hand corner of the Fleet Complete screen.



In the Search field, located to the top right of this window, type **Activities** to retrieve all links, which relate to this topic, then click GO.

| ORKING IN THE SEARCH SCREEN | |
|-----------------------------|--|
| | |

The **Search** screen allows a dispatcher to search and review existing activities based on specified criteria in a list format.

From the main toolbar, click the Activities menu
 > Search.

Result: the Activities-Search screen opens.

 Use the Basic Search tab to search based on a single criterion (Activity number, reference, location (POI), or assigned resource/crew).

| 2 | Booking |
|---|----------|
| | Search |
| 6 | Template |

Billi

| Activity No | Reference | Resource/Crew | Status | Created Time | Dispatched Time | Accepted Time | Completed | | Branch | Locatio | Address |
|---------------|----------------|---------------------|-----------|--------------|---------------------|---------------|-----------|--------|-----------|---------|---------|
| g a column he | ader here to g | roup by that column | | | | | | | | | |
| | | | | | | | | | Clear All | | |
| Status | | v × | County | | Postal/Zip Code (St | arts with) | | | Search | | |
| Resource | / Crew | v × | City (Exa | ct) | State/Province | v × | From Date | V To D | late 🗸 | | |
| Activity | Re | ference | Name | | Street (Contains) | | Date Type | | ~ × | | |
| General | | | Location | | | | Date | | | _ | |

- **3.** Use the **Advanced Search** tab to retrieve activities based on multiple criteria available in the top panel. NOTE: Multiple criteria are cumulative (this AND that AND the other).
- **4.**Click the **Search** button, located to the right of this panel, to launch the search.

Result: A list of activities that match the search criteria above displays in the grid below.

Click the Print/Export button located on the top right of the Activity-Search screen, to print or export activities to a variety of formats including Excel and PDF.

| | Search | | 1 1 / 2 E & (| | | | |
|------------|--------------------------------------|---|---|--|--|--|--|
| ACTIVITIES | Search | | About Activities | | | | |
| Rank 🛆 | Title | - | | | | | |
| 1 | About Activities | | Why Use This Function? | | | | |
| 2 | Working with Activities | | Use the Activities function to define simple activities (such as a service | | | | |
| 3 | Tracking Assets | | call) to be done at a specific location, assign them to a resource, and | | | | |
| 4 | About Assets | | monitor their progress. | | | | |
| 5 | Setting up Fleet Complete | = | | | | | |
| 6 | About Fleet Setup | 1 | Activities have a specific status: status names are set up by default but can | | | | |
| 7 | About Tracking | | be changed. | | | | |
| 8 | About POIs | | Activities appear and are worked with on two separate screens: the | | | | |
| 9 | About Resources and Crews | | Activities panel of the Tracking screen (shows activities for assets currently | | | | |
| 10 | About Operations Reports | | on the map), and the Booking screen (shows all activities, in a calendar | | | | |
| 11 | Working with Operations Rep orts | - | view). | | | | |
| 12 | Customizing Data Collection | | What Do I Need to Understand About Activities? | | | | |
| 13 | About Effective and Expiry D ates | | Note: Activities are associated with a branch. | | | | |
| 14 | Using Grids | | The information associated with an activity includes: | | | | |
| 15 | About Route Template Workfl | | | | | | |
| | ow | | the POI at which the activity should take place | | | | |
| 16 | Managing Route Templates | | the activity number (system-assigned) | | | | |
| 17 | Setting up Route Templates | | when the activity should start and by when it should be completed – this | | | | |
| 18 | About Routes | - | information helps flag activities that are late or almost late to start or | | | | |
| | | - | finish | | | | |
| 📃 тос | | | its status (see workflow below) | | | | |
| 🔎 Searc | h | | what resource/crew has been assigned the activity, if any what service group is associated with the activity | | | | |
| Gloss | | | mat service group is associated with the activity notes and instructions about the activity (for example, "replace air | | | | |
| C) Gloss | sary | _ | notes and instructions about the activity (for example, replace air conditioner unit") | | | | |
| | | | | | | | |
| | | | The workflow of an activity is as follows: | | | | |