

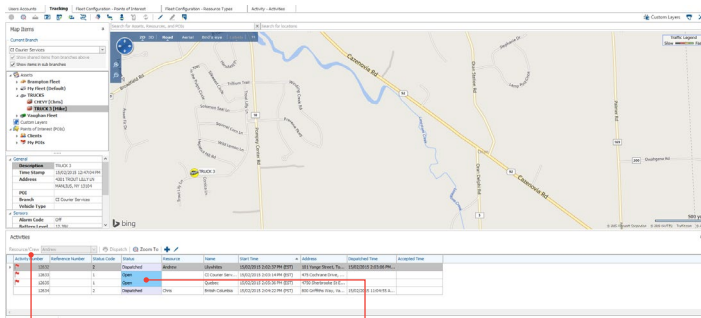
# Working with Activities

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



In the Activities panel location below the map, you can create and monitor the progress of the incomplete activities.

⇒ Those Activities that are completed disappear from this panel.

The Status column displays different colors based on Status type:

- **Blue** = Open
- **Green** = Accepted
- **Purple** = Dispatched
- **Red** = Rejected

## CREATING AN ACTIVITY

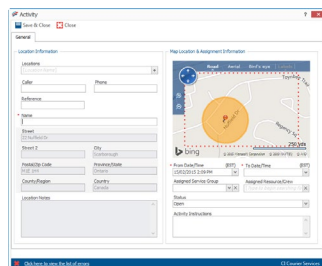
To create an activity from the **Tracking** Screen, follow these steps:

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

**Result:** the Activity dialogue box displays.

2. 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.



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**.

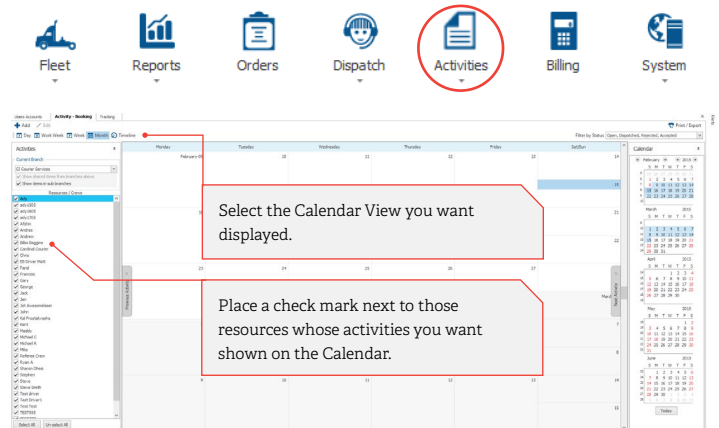
6. In the **Activities Instructions** box, you may enter helpful instructions, as required.

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.



Select the Calendar View you want displayed.

Place a check mark next to those resources whose activities you want shown on the Calendar.

**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.

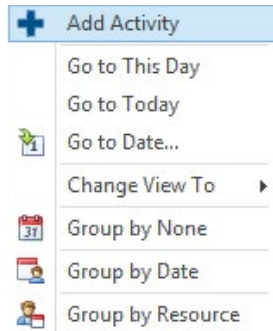
**Result:** The Activity dialogue box displays.



4. Complete the details of the Activity as explained in the previous section 'Creating an Activity'.

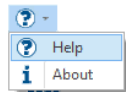
5. Click **Save & Close**.

⇒ 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.

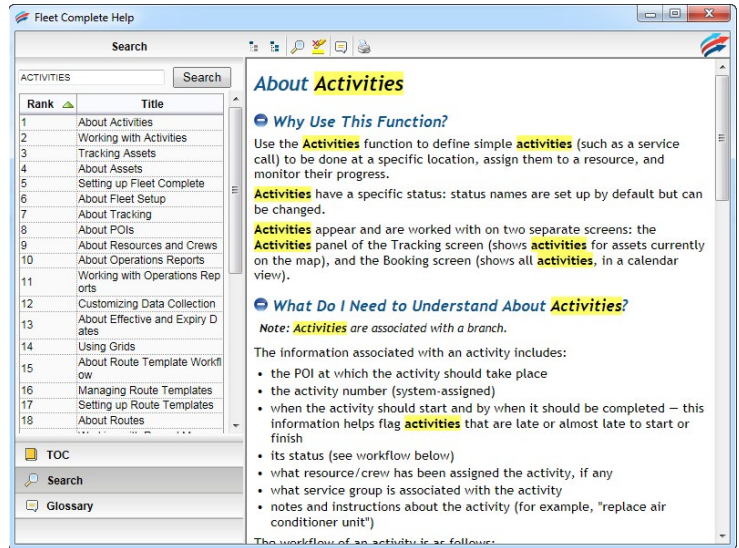


## TO LEARN MORE ABOUT ACTIVITIES

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.



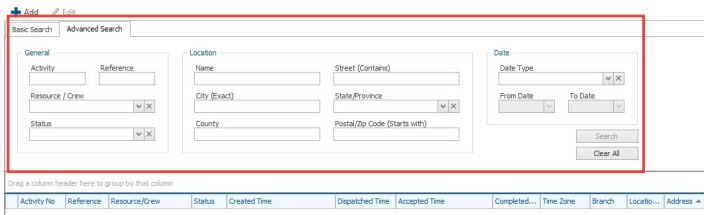
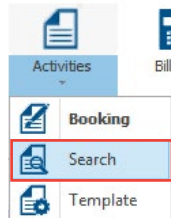
## WORKING IN THE SEARCH SCREEN

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

1. From the main toolbar, click the **Activities** menu -> **Search**.

*Result: the Activities-Search screen opens.*

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



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.