








## Quick Reference Card

# Working with Activities

### OVERVIEW

Activities are tasks that need to be performed at a specific location, assigned to a Resource, and then monitored in terms of their progress. The Activity screen displays all activities that currently have a status of Unassigned, Dispatched, In Progress, and Completed.

### ADD AN ACTIVITY

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
4. Click the **Dispatch** submenu item
5. Click the **Add** button 
6. In the *New Activities* screen, click the **From Calendar** button to select the **From** date of the activity 
7. Click the first **Clock** button to specify the begin time for the activity 
8. Click the **To Calendar** button to select the **To** date of the activity
9. Click the second **Clock** button to specify the end time for the activity
10. In the Resource field, type a resource **Description** to assign the resource to the activity
11. Type the **Activity Title**
12. Type the activity location in the **Address** fields
13. Type the **Contact Name** as necessary
14. Type the **Phone Number** as necessary
15. Type any **Notes** pertaining to the activity for the resource
16. Click the **Save** button 

### MANAGE ACTIVITIES

In the *Activities* screen, the status of an activity is displayed as *Unassigned*, *Dispatched*, *In Progress*, and *Completed*.

1. The *Activities* screen displays notifications in the upper right corner when they are rejected by the resources.
2. Once an activity is rejected, it displays in the **Unassigned** section and a red **X** displays to the left of the name of the resource that rejected the activity

Resource	Activity Name	Location	Start Time	End Time
Unassigned	Delivery to Toronto Zoo	Toronto Zoo, Toronto, ON, Canada, Toronto, M7S 2S8, ON, CAN	Aug 21 2017 08:00 AM	Aug 21 2017 09:00 AM
Unassigned	JOB 999 201 - Equipment Pickup	380 Humber Park Blvd, Whitefish Bay, WI, USA, WI, USA	Aug 21 2017 10:21 AM	Aug 21 2017 11:21 AM
Dispatched	STATUS HISTORY TAB	5500 East Drive, Mississauga, ON, CAN	Aug 21 2017 08:21 AM	Aug 21 2017 10:21 AM
ADP 5000	CI Headquarters	375 Cochrane Drive, Markham, L3R 9W4, ON, CAN	Aug 21 2017 09:19 PM	Aug 21 2017 04:19 PM
ADP 5000	Activity #894	88 Queens Boulevard, 11375, NY, USA	Aug 22 2017 11:00 AM	Aug 22 2017 01:00 PM
Proper Pella	CI Headquarters	475 Cochrane Drive, Markham, L3R 9W4, ON, CAN	Aug 22 2017 01:00 PM	Aug 22 2017 04:00 PM
John Dobie	Task Header 9999	Canada, Mississauga Drive, Vaughan, ON, CAN	Aug 22 2017 08:47 AM	Aug 22 2017 08:47 PM
Proper Pella	CI Headquarters	475 Cochrane Drive, Markham, L3R 9W4, ON, CAN	Aug 22 2017 12:00 PM	Aug 22 2017 02:00 PM

### MANAGE UNASSIGNED AND REJECTED ACTIVITIES

For activities that are unassigned or have been rejected by the resource, they can be assigned or re-assigned from the *Activities* screen

1. In the *Activities* screen, click an activity to be assigned
2. Click the **Pencil** button to edit the activity




# Quick Reference Card

3. Alternatively, click **Assign Resource** for the activity

Resource	Activity Title	Location	Start Time	End Time
Unassigned	74			
Assign Resource	API TEST ACTIVITY FROM 2018-09-21 5:28:22 PM	88 Queens Quay West, Suite 200, Toronto, M5J 0B8, ON, Canada, CAN	21 Aug 2018 5:28:22 PM	22 Aug 2018 5:28:22 PM

## ACCESS HISTORY

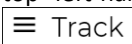
The History tab in the *Activities* screen displays all Completed and Cancelled activities and are organized chronologically based on the end date and time of the activity

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
4. Click the **History** submenu item
5. Use the *Search* field to locate an activity by its Description and then click the spy glass button

Activity Title	Location	Resource	Dispatch Time	Start Time	Completion Time	Status
851728 QA Test 3	88 Queens Quay West, Toronto, M5J 0B8, ON, CAN	Mark Padilla	8 Nov 2018 12:07:56 PM	N/A	8 Nov 2018 12:08:57 PM	Completed
test1111z	178 Strada Caracal, Craiova, 200746, DJ, ROU	Radu F 10000.1	8 Nov 2018 8:49:01 AM	N/A	8 Nov 2018 8:49:47 AM	Completed
yyyy/yyyyy	178 Strada Caracal, Craiova, 200746, DJ, ROU	Radu F 10000.1	8 Nov 2018 9:01:46 AM	N/A	8 Nov 2018 9:03:06 AM	Completed

## ACCESS TIME CARDS

The *Time Card* report tracks the day of a Resource and is used in conjunction with the Fleet Complete Task Tracker solution. The Time Card report displays the resource's schedule and start time. It also displays date, end time, shift duration, number of breaks, time on break, and total time worked minus breaks.

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
4. Click the **Time Cards** submenu item
5. Click the first **Calendar** button to select the **From** date of an activity

6. Click the second **Calendar** button to select the **To** date of the activity

Resource Name	Date	Work Schedule	Start Time	End Time	Shift Duration	Number of Breaks	Time on Break	Total Time Worked	
MP Mark Padilla	26 Sep 2018	workdays	3:17 PM	3:17 PM	0 minutes	1	0 minutes	0 minutes	<a href="#">View Details</a>
MP Mark Padilla	26 Sep 2018	workdays	3:19 PM	3:19 PM	0 minutes	0	0 minutes	0 minutes	<a href="#">View Details</a>
MP Mark Padilla	26 Sep 2018	workdays	3:31 PM	3:31 PM	0 minutes	0	0 minutes	0 minutes	<a href="#">View Details</a>
MA Muhammad Arshad	26 Sep 2018	all day every day	12:41 PM	2:52 PM	2 hours 10 minutes	0	0 minutes	2 hours 10 minutes	<a href="#">View Details</a>

## TO LEARN MORE ABOUT ACTIVITIES

To learn more about Activities, click the **Help** button located in the top right-hand corner of the tracking screen and perform a keyword search.