



Task Dispatch User Guide



Managing employee workload through an interactive dashboard

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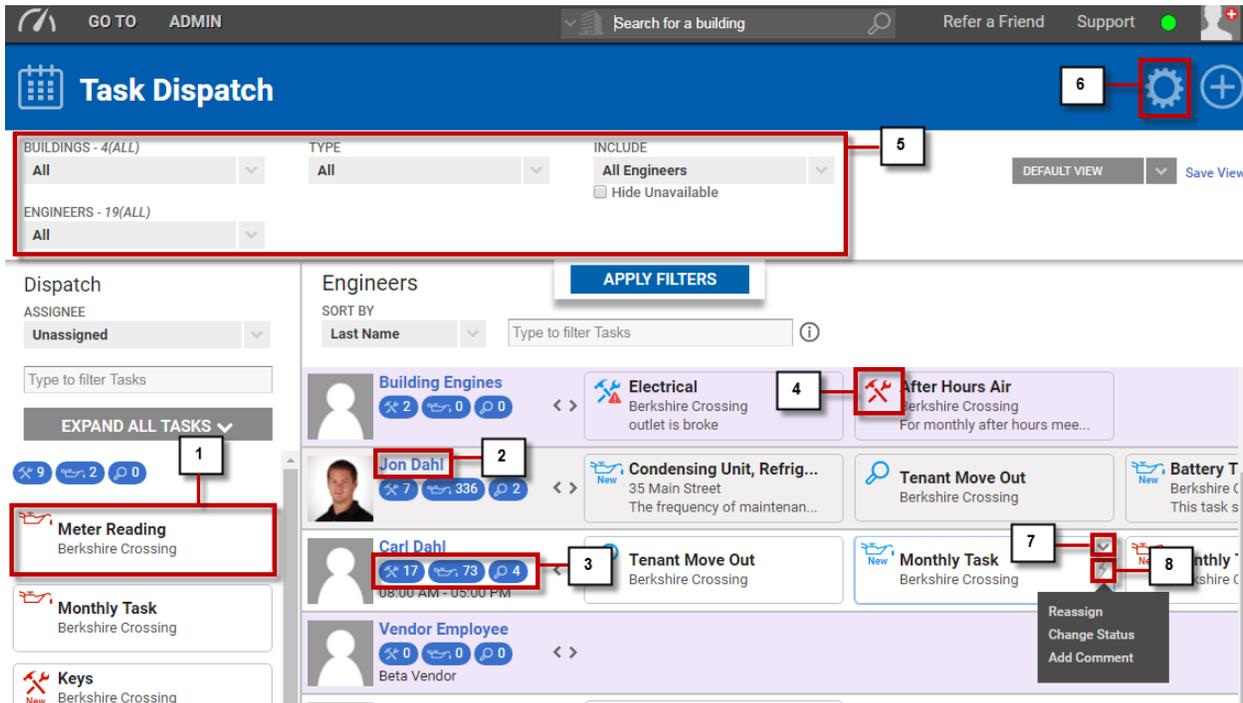
Task Dispatch

The Task Dispatch dashboard provides an interactive command center for your building’s work orders, preventive maintenance tasks, and inspections. From the dashboard, you can view a user’s workload, view task details, reassign tasks, update statuses, and add comments.

This section describes the functionality associated to the Task Dispatch dashboard.

Navigating the Task Dispatch Dashboard

The following image illustrates some of the features associated to the Task Dispatch dashboard.



1. **Task Card:** Task cards display the task type, building association, and details.
2. **Assignee Name:** Employee rows alternate between white and gray, while vendor rows are displayed in purple. Employees that are out of office are displayed in orange. Clicking a user’s name brings you to their user record.
3. **Task Count:** This number represents a sum of all work orders, preventive maintenance tasks, and inspections assigned to the user. Clicking the task number brings you to the task type grid, pre-filtered by the user’s name.
4. **Red Task Icon:** A task’s icon is displayed in red when a Performance Management target is missed or the task is overdue.

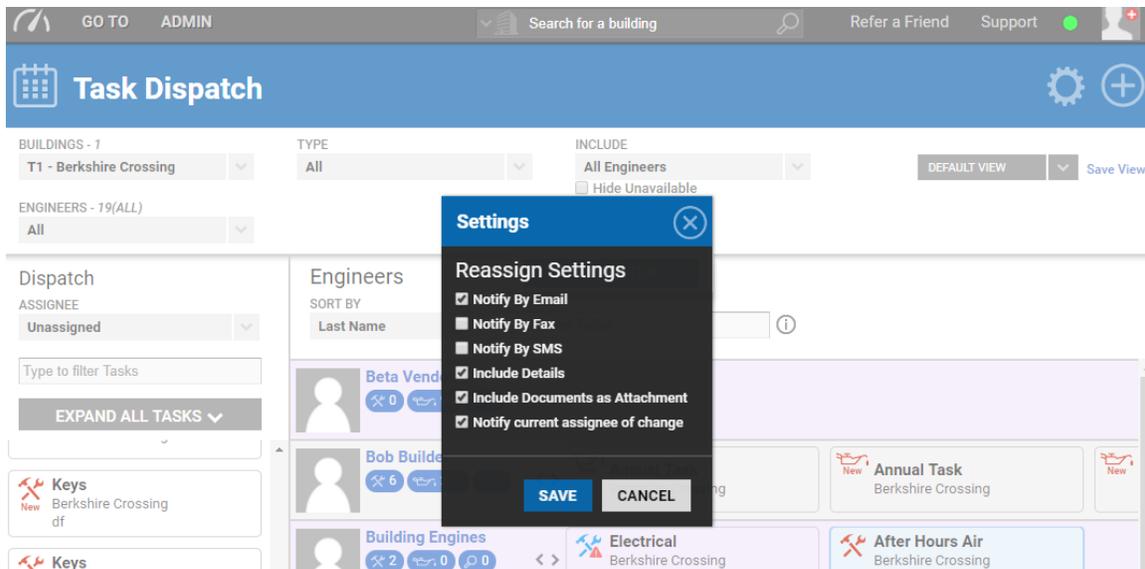
5. **Search Filters:** Use the provided filters to sort the dashboard by building, task type, user, or custom user group.
6. **Settings:** Click the  to edit task assignment preferences.
7. **Task Detail Expander:** Click the  to expand the row and view task details.
8. **Actions:** Click the  to reassign, update a status, or add a comment to a task.

Configuring the Reassignment Settings

When a task card is moved from the Dispatch panel to an assignee's row, the application can be configured to notify the assignee through a preferred protocol. This section describes the process of configuring your reassignment settings.

To configure the reassignment settings:

1. Click **Go To > Tasks > Task Dispatch**.
2. Click the Settings  icon.
3. Using the **Settings** pop-up, select your reassignment preferences.



4. Click **SAVE**.

Configuring Employee Hours

To receive the most benefit from the Task Dispatch dashboard, it is recommended that you specify each assignable employee's working hours. Configuring employee hours allows you to make better informed decisions with your task assignments. This section describes the process of configuring employee hours.

To configure employee hours:

1. Click **Admin > Employees**.
2. Use the **SEARCH** and/or column filters to locate the employee.
3. Click the employee **NAME**.
4. Navigate to the **Employee Hours** grid and enter the days and times that the employee is available.

Note: Employee Hours are ONLY relevant to the Task Dispatch functionality. The following image is an example of an employee's hours.

Employee Hours

Suppress notifications during non-work hours

	Sunday	Monday	Tuesday	Wednesday	Thursday	Friday	Saturday
Start Time		08:00 AM	08:00 AM	08:00 AM	08:00 AM	08:00 AM	
End Time		05:00 PM	05:00 PM	05:00 PM	05:00 PM	05:00 PM	

5. After you finish entering the employee's availability, click **SAVE**.
6. Once configured, working hours are displayed below the employee's name on the Task Dispatch dashboard.

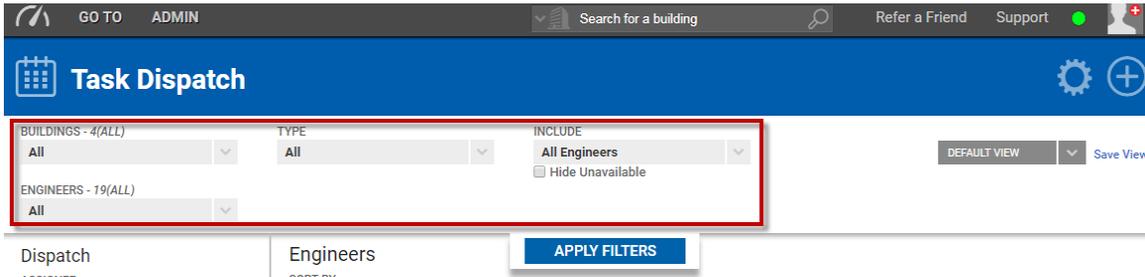
Assigning Tasks to a User

This section describes the process of assigning a task to system users using the Task Dispatch dashboard.

To assign a task to a user:

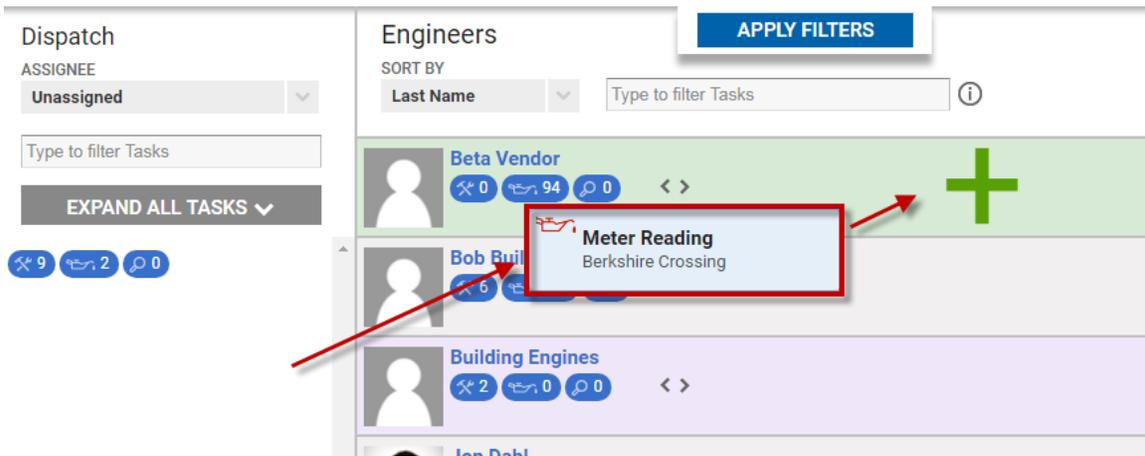
1. Click **Go To > Tasks > Task Dispatch**.

- (Optional) To refine the dashboard view, use the provided search fields and click **APPLY FILTERS**.



- From the **Dispatch** panel, left click on a task card and then drag it to the row of the new assignee.

Note: Users cannot be assigned tasks outside of their building association. Ineligible users are grayed out until the task card has been unselected or dropped into an eligible user's assignment row.



- (Optional) Use the side scroll arrows <> to access the full list of task cards.