

# Fleet*Ohio* Training Program

# Today's Agenda

- What is FleetOhio?
- Accessing the Program
- Navigating FleetOhio
- Fuel Tickets
- Bulk Fuel Receipts
- Work Orders
- Updating Locations
- Advanced Options in FleetOhio
- Selecting and Filtering Data
- Online Reports
- Logging Off

# What is FleetOhio?

- FleetOhio is a computer program used to track the operational and expense information on the state's fleet.

# Accessing the Program

## Access the Program

- Select the *FleetOhio* Icon on your desktop.



FleetOhio.Ink

- Enter your User Id and Temporary Password and Select <OK>.



# Accessing the Program

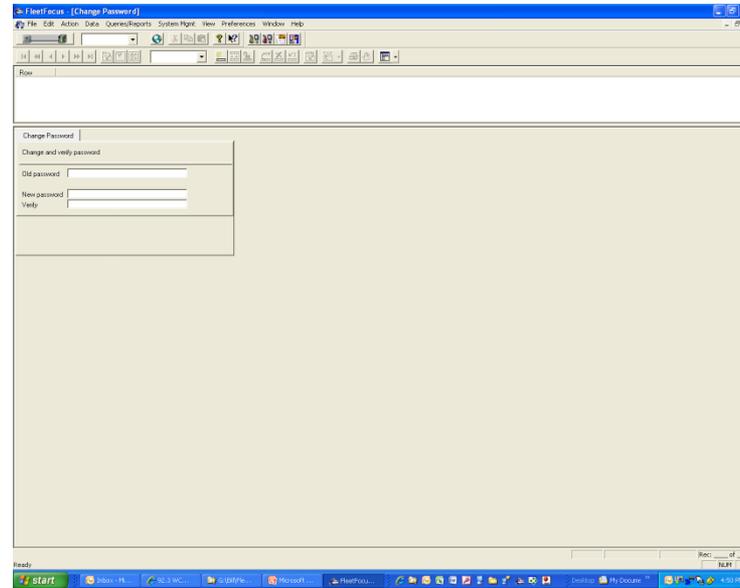
## Access the Program (continued)

### Main Screen after Logon

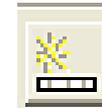


# Accessing the Program

## Change Your Password

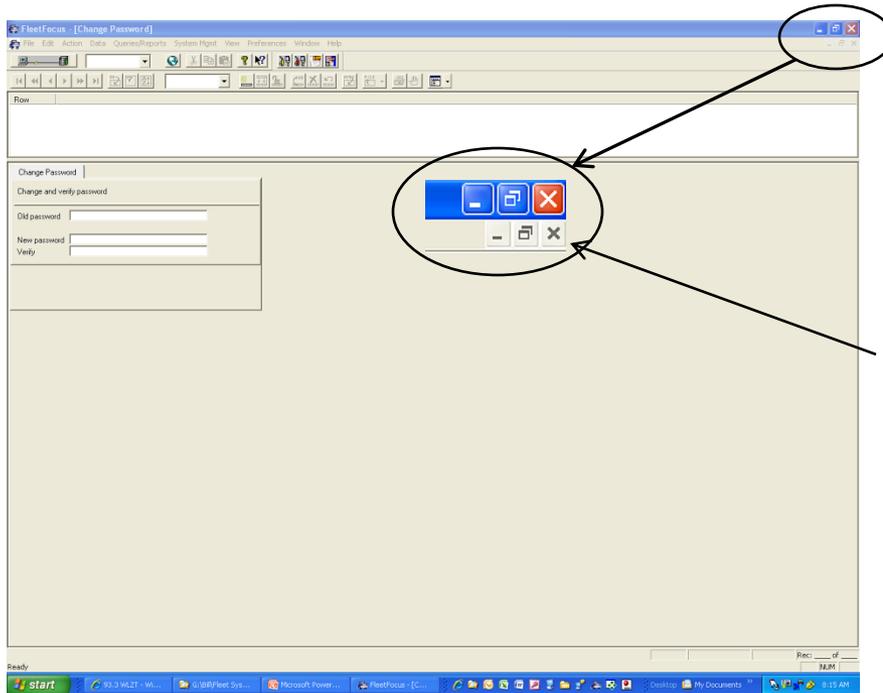


- Select System Mgmt -> Setup -> Access Rights -> Change Password to get to the Change Password Screen.
- At the Change Password screen select the Insert Record button.
- Enter your current password , new password (7 - 10 characters, all capital letters), and verify password.
- When done process the change by selecting the Process button.



# Accessing the Program

## Returning to the Main Screen



To get back to the Main Screen close the window by selecting the small "X" button.

# Exercise 1: Changing your password

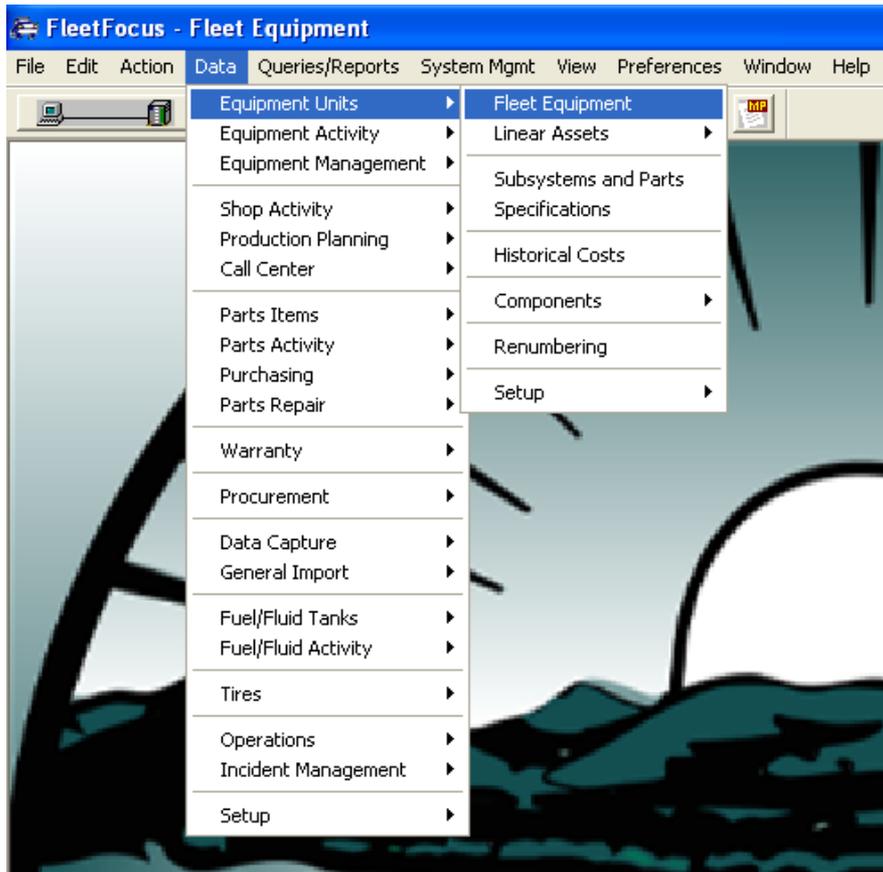
- Change your temporary password using the steps outlined previously.
- Write down your new password on the sheet provided.
- Close the application and log back in using your new password.

# Navigating Fleet Ohio

## GUI Interface

### Fleet Equipment Path

Data -> Equipment Units-> Fleet Equipment



- The Fleet Equipment screen is used to view/modify vehicle data.

# Navigating Fleet Ohio

## GUI Interface (The Screen)

Reports Choice List    Toolbar Buttons    Action Buttons    Custom Action Buttons

The screenshot shows the FleetFocus application window titled "FleetFocus [Fleet Equipment]". The interface includes a menu bar with options like File, Edit, Action, Data, Queries/Reports, System Mgmt, View, Preferences, Window, and Help. Below the menu bar is a toolbar with various icons. A "Reports Choice List" is located in the top right of the toolbar area. Below the toolbar is a grid with columns: Row, Equipment ID, Model year, Manufacturer ID, Model ID, License number, Operator ID, Department ID, Latest meter 1 reading, Latest meter 2 reading, Equipment type, and Serial number. A horizontal "Splitter Bar" is positioned below the grid. Below the splitter bar is a "The Tabs" section containing a list of tabs: Individual PM, Inspections, Codes, Recurring Costs, Credit Cards, Acquisition, Registration, Multi-jurisdictional, Ownership/Depreciation, Warranty, Replacement/Disposition, Notes, Files, Position Info, Add Data, Relationships, Basic Info, Meter Info, Classes, Locations, Assignments, Accounts, Status, Motor Pool, Authorization, Comments, and Class PM. Below the tabs is a form with fields for Equipment ID, Model year, Manufacturer ID, Model ID, Equipment type, Description, Color, Serial number, Asset number, and an Associated file section with Path and file name and Description fields. A "New equipment unit" button is also present. At the bottom of the window is a "Status Bar" showing "Ready" and "Rec: \_\_\_ of \_\_\_ NUM".

Menu Bar

Communication Indicator

Movement Buttons for the Grid

The Grid

Splitter Bar

The Tabs

Status Bar

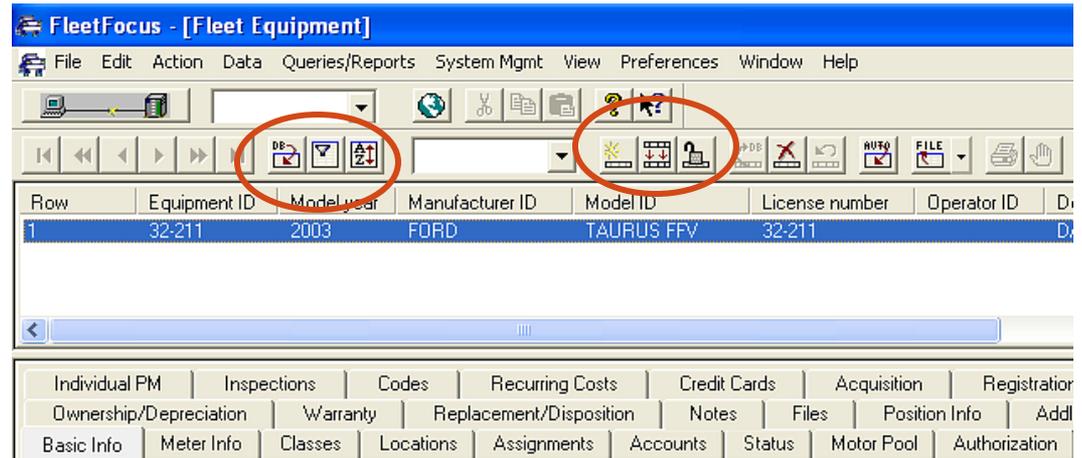
Look here for successful Insert or error messages!

# Navigating Fleet Ohio

## Action Buttons

- **Retrieve Information**

- Get Data
- Filter
- Sort

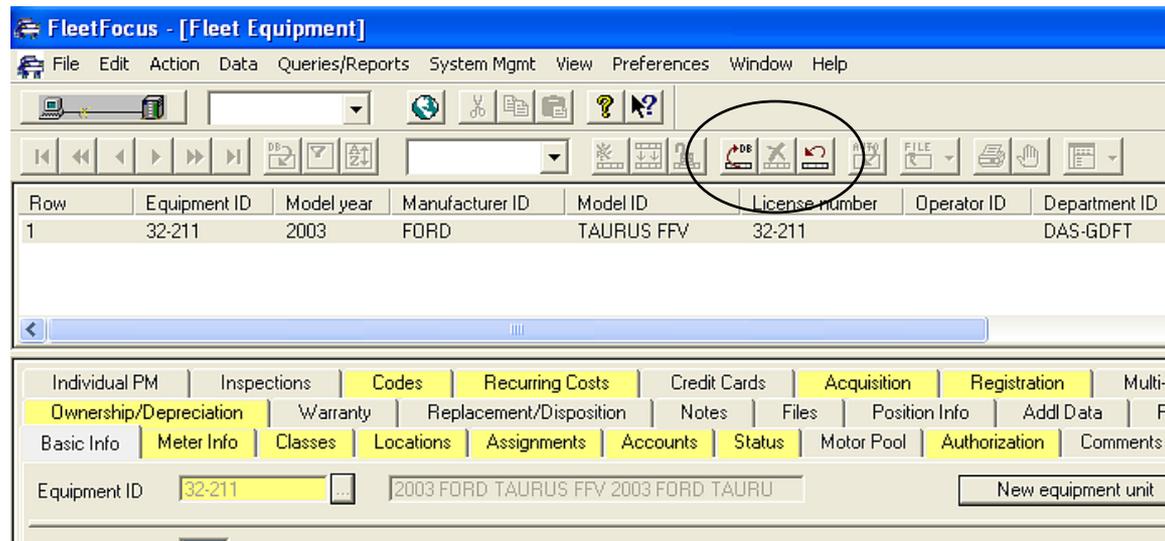


- **Insert or Update Information**

- Prepare for Insert – adding a new record or transaction from scratch. 
- Prepare for copy – Creates a new record based on certain information in an existing record. 
- Prepare for Update – used to modify information in an existing record. 

# Navigating Fleet Ohio

## Action Buttons (Continued)

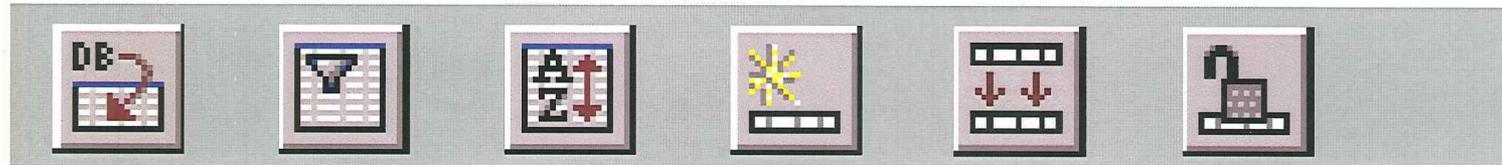


- **Completing a task**

- Process – Used to save a record after entering information. 
- Delete – deletes the existing record 
- Cancel – Similar to the escape key in that new information entered is not saved but the record is intact. 

# Navigating Fleet Ohio

## Action Buttons (Continued)



**Get Data**

**Filter**

**Define Sort**

**Prepare for  
Insert**

**Prepare for  
Copy**

**Prepare for  
Update**

*(Ctrl + G)*

*(Ctrl + F)*

*(Ctrl + O)*

*(Ctrl + N)*

*(Ctrl + Y)*

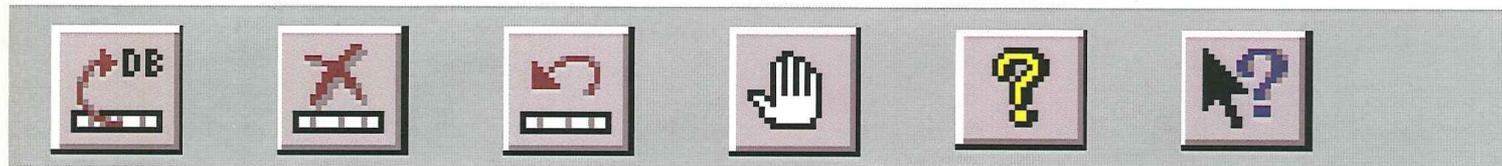
*(Ctrl + U)*

*Unrestricted  
Get Data*

*Restricted  
Get Data*

*Star for Start*

*Unlock*



**Process**

**Delete**

**Cancel**

**Stop**

**About**

**Help Context**

*(Ctrl + S)*

*(Ctrl + D)*

*(Ctrl + Z)*

*(F1)*

*Save*

*Undo*

*Stop Data  
Retrieval*

*Screen Specific  
On-line Help*

# Fuel Tickets

## What is a Fuel Ticket?

- A Voyager receipt, ODOT receipt, or bulk fuel log sheet for a fuel transaction.
- FleetOhio tracks three types of fuel tickets:
  - *Automated*
  - *External*
  - *Internal*
- We will be discussing each of these ticket types in detail in a moment
- Each fuel transaction/ticket must be entered into or accounted for in FleetOhio.

# Fuel Tickets

## Automated Fuel Ticket

### Retail Fuel Ticket - Voyager (Automated, Single Transaction)

```
                W BROAD
DUCHESS
BP DUCHESS 258
00
4100 W BROAD ST
COLUMBUS, OH
43228
12/08/2008
3:58:51 PM 4811
PUMP#11
REGULAR          7.2556
PRICE/GAL        $ 2.329
FUEL TOTAL       $16.35
```

```
-----
Total = $16.35
```

```
VOYAGER
XXXXXXXXXXXXXXXX4372
Auth #: 584821
Odometer: 17623
Ref: 21622040
Resp Code: 002
Stan: 0316652362
SITE ID: 8864001
                THANK YOU!
COME AGAIN!
```

### *Automated*

A retail fuel receipt that is received when fuel is paid for with the state fleet card (currently Voyager). These receipts are not entered into FleetOhio as they are automatically uploaded into FleetOhio.

# Fuel Tickets

## External Fuel Ticket

### Bulk Fuel Ticket (External, Single Transaction)

EM-1  
Rev. 7-08

STATE OF OHIO  
DEPARTMENT OF TRANSPORTATION  
**GASOLINE AND OIL TICKET**

License No. 32 211 Make ford focus Mileage 76842

Received of Transportation Dist. No. \_\_\_\_\_ Unit Price \_\_\_\_\_ Net \_\_\_\_\_

County Franklin Gas 10 gal. \$ \_\_\_\_\_ \$ \_\_\_\_\_

Address 4100 Sunfire Road Oil \_\_\_\_\_ qts. \$ \_\_\_\_\_ \$ \_\_\_\_\_

Date 9/29/09 Total Amount \$ \_\_\_\_\_

Received by Wendy Herring / DAS Dispenser Wendy Herring

Dept. worked for Department of Administration Services / SAO Ticket No. \_\_\_\_\_

Dept. or Bureau to be invoiced POST/SAO

DOT - 1863 White with Vendor — Yellow with Invoice — Pink with Driver

### External

A retail fuel receipt that is *not* processed on the State Fleet Card , or a bulk fuel receipt that is obtained when fueling at another state agency other than your own (i.e. ODOT, DNR, DMH) or from an “out-of-pocket” (*non-purchasing card*) expense. The transaction must be entered into FleetOhio.

### “Out-of-Pocket” Ticket (External, Single Transaction)

Kroger Fuel  
#518

~~12/14/09 16:05:31~~

Term: 155123083  
Appr: 06013Z

PUMP# 04 CREDIT/  
E85 @ \$2.269/G  
VOLUME 14.782 GAL

GAS TOTAL \$33.54  
YOU SAVED \$0.03 PER GAL

Master Card  
XXXXXXXXXXXX9385  
12/14/2009 16:05:31

I agree to pay the  
above Total Amount  
according to Card  
Issuer Agreement.

THANK YOU FOR  
SHOPPING KROGER!

*Trip to  
Lottery w/ Steve*

# Fuel Tickets

## Internal Fuel Ticket

### Fuel Log (Example OSP Bulk) (Internal, Multiple Transactions)

#### Internal

Bulk fuel dispensed at your agency's fueling facility.

Each transaction must be entered into FleetOhio.

Multiple vehicles may be processed at one time.

OHIO DEPARTMENT OF PUBLIC SAFETY  
EDUCATION - SERVICES - PROTECTION

GASOLINE RECORD

DATE 9/21/09

426476.5

VEHICLE SP #	MILEAGE	GASOLINE	TIRES	NAME	UNIT/EMPLOYEE # & AGENCY
1101	43,600	10 <sup>2</sup>		ALLEN	1186
1523	12243	6 <sup>2</sup>		HAYES	806
1360	67951	7 <sup>5</sup>		BALLOCK	1588
1426	76117	13 <sup>6</sup>		DAVHERG	441
		37.9			

GASOLINE PUMP METER READING - 426514.4

DPS 0049 4108 (DPS-203.01) 426476.5

INCHES OF FUEL RECORDED ON DIP STICK -

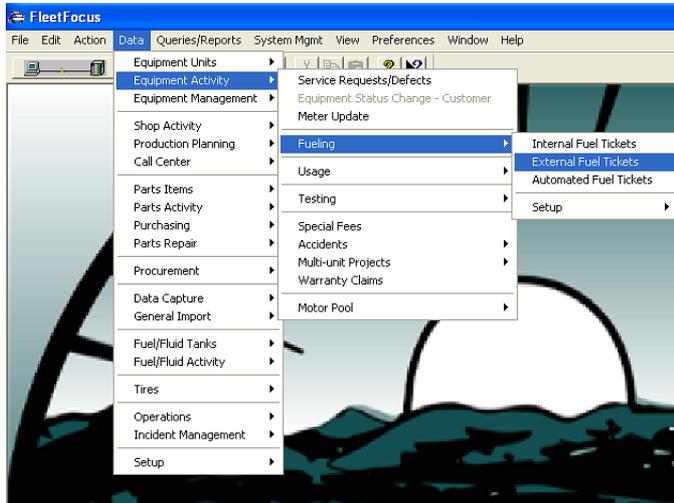
37.9

# Fuel Tickets

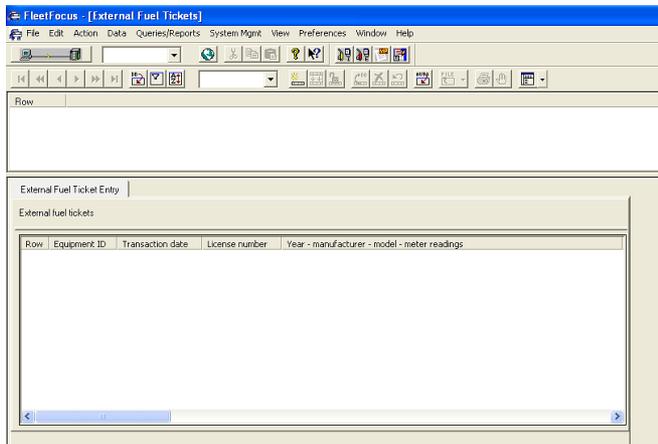
## External Fuel Ticket Entry

### External Fuel Ticket Path

Data -> Equipment Activity -> Fueling -> External Fuel Tickets

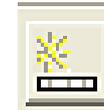


### External Fuel Ticket Screen



### Data Entry

1. Select Insert Button
2. Equipment Id
3. The transaction date and Year-Manufacturer-Model-Meter Readings fields will auto populate to the current date. The transaction date needs to be changed to the date on the ticket
4. Meter 1 reading (Odometer to the whole mile, no tenths)
5. Meter 1 Validation (*Select EQ UPD if the meter reading is greater than the meter displayed on the screen.*)
6. Fuel Type (01-Unleaded, 05-Diesel, 53-E85, DO-Biodiesel)
7. Fuel Qty. (Gallons with tenths –XX.X)
8. Fuel Cost (\$) (Total Cost – *not price per gallon*)
9. Fluid/Product Type (Optional – If selected, you will need to complete the Fluid Qty. and Misc. Cost entries)
10. Fluid/Product Qty. (Optional-not required by all agencies)
11. Misc. Cost (Optional-not required by all agencies)
12. Vendor Id (Optional-not required by all agencies)
13. Select Process Button

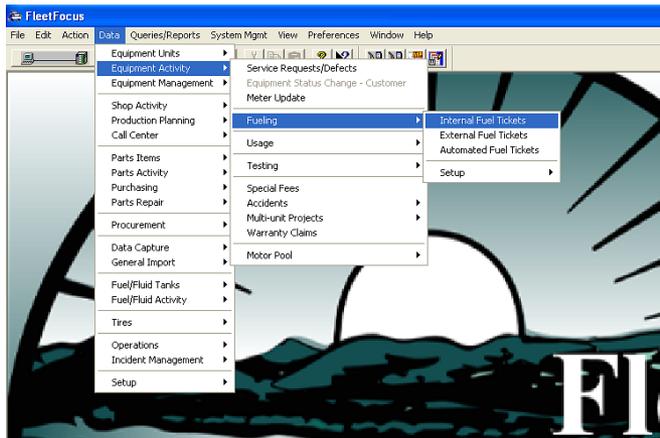


# Fuel Tickets

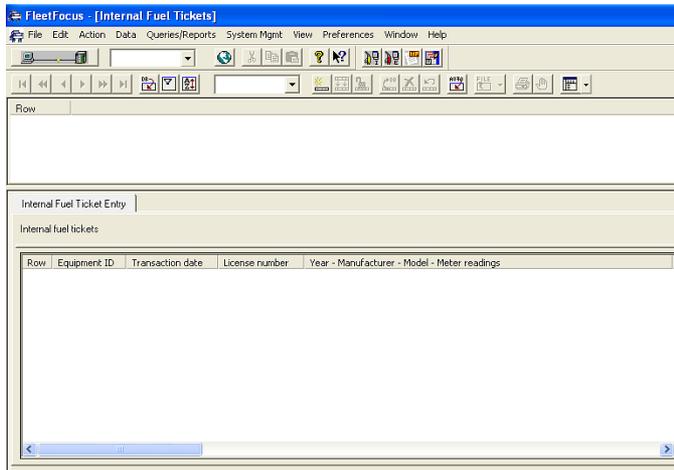
## Internal Fuel Ticket Entry

### Internal Fuel Ticket Path

Data -> Equipment Activity -> Fueling -> Internal Fuel Tickets

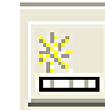


### Internal Fuel Ticket Screen



### Data Entry

1. Select Insert Button
2. Equipment Id
3. The transaction date and Year-Manufacturer-Model-Meter Readings fields will auto populate to the current date. The transaction date needs to be changed to the date on the ticket
4. Meter 1 reading (Odometer to the whole mile, no tenths)
5. Meter 1 Validation (*Select EQ UPD if the meter reading is greater than the meter displayed on the screen.*)
6. Tank ID
7. Fuel Type (01-Unleaded, 05-Diesel, 53-E85, DO-BIODIESEL) – *Value not required if Tank ID is populated.*
8. Fuel Qty. (Gallons with tenths – XX.X)
9. Fluid/Product Type (Optional – If selected you will need to complete the Fluid Qty. and Misc. Cost entries)
10. Fluid/Product Qty. (Optional-not required by all agencies)
11. Misc. Cost (Optional-not required by all agencies)
12. Select Process Button



# Fuel Tickets

## Reversals – After Processing

The screenshot displays the FleetFocus software interface for 'External Fuel Tickets'. It shows four different views of the data:

- View 1:** A simple list of rows with a single row containing the number '1'.
- View 2:** A table titled 'External Fuel Ticket Entry' with columns: Row, Equipment ID, Transaction date, License number, and Year - manufacturer - model - meter readings. It contains three rows of data for equipment SP-1007.
- View 3:** A table titled 'External Fuel Ticket Entry' with columns: Meter 1 reading, Meter 1 validation, Meter 2 reading, Meter 2 validation, Reversal, Fuel type, Fuel qty, and Fuel cost. It contains four rows of data.
- View 4:** A table titled 'External Fuel Ticket Entry' with columns: Fluid/product type, Fluid/product qty, Fluid/product cost, Misc cost, Account ID, and Back out fuel tax. It contains three rows of data.
- View 5:** A table titled 'External Fuel Ticket Entry' with columns: Back out fuel tax, State or province, Employee/operator ID, Vendor ID, Currency ID, and Comments. It is currently empty.

- Find Transaction that requires reversal.
- Gather required information
  - Equipment Id.
  - Transaction Date
  - Meter Reading
  - Fuel type
  - Fuel Quantity
  - Fuel Cost
- We have included a form for recording the required transaction information to process a reversal

# Fuel Tickets

## Reversals – After Processing

**External Fuel Ticket Entry**

External fuel tickets

Row	Equipment ID	Transaction date	License number	Year - manufacturer - model - meter readings
*	SP-1007	03/31/2010 00:00		2007 FORD CROWN VIC PP==Meters: 1-115232; 2-0==2007 FORD CROWN VIC PP
*				

**External Fuel Ticket Entry**

External fuel tickets

Meter 1 reading	Meter 1 validation	Meter 2 reading	Meter 2 validation	Reversal	Fuel type	Fuel qty	Fuel cost
115232	NO EQ UPD			X	01	11.96	30.83

**External Fuel Ticket Entry**

External fuel tickets

Fluid/product type	Fluid/product qty	Fluid/product cost	Misc cost	Account ID	Back out fuel t
				00DHSOSHPP555	

**External Fuel Ticket Entry**

External fuel tickets

ix	State or province	Employee/operator ID	Vendor ID	Currency ID	Comments

- To process a Reversal reenter the transaction information gathered in the previous step and place a check mark in the reversal checkbox.
- Process the transaction 

# Fuel Tickets

## Reversals – After Processing

- Completed Reversal

**FleetFocus - [External Fuel Tickets]**

File Edit Action Data Queries/Reports System Mgmt View Preferences Window Help

Row  
1

---

External Fuel Ticket Entry

External fuel tickets

Row	Equipment ID	Transaction date	License number	Year - manufacturer - model - meter readings
1	SP-1007	03/31/2010	1068	2007 FORD CROWN VIC PP==Meters: 1-115232; 2-0==2007 FORD CROWN VIC PP
2	SP-1007	03/31/2010 00:00		2007 FORD CROWN VIC PP==Meters: 1-115232; 2-0==2007 FORD CROWN VIC PP
3	SP-1007	03/27/2010	1068	2007 FORD CROWN VIC PP==Meters: 1-115232; 2-0==2007 FORD CROWN VIC PP
4	SP-1007	03/24/2010	1068	2007 FORD CROWN VIC PP==Meters: 1-115232; 2-0==2007 FORD CROWN VIC PP
5	SP-1007	03/15/2010	1068	2007 FORD CROWN VIC PP==Meters: 1-115232; 2-0==2007 FORD CROWN VIC PP

---

External Fuel Ticket Entry

External fuel tickets

Meter 1 reading	Meter 1 validation	Meter 2 reading	Meter 2 validation	Reversal	Fuel type	Fuel qty	Fuel cost
115232	0				01	11.960	30.83
115232	0			X	01	-11.960	(30.83)
114896	0				01	11.210	28.22
114240	0				01	11.640	29.19
113480	0				01	10.050	25.20

---

External Fuel Ticket Entry

External fuel tickets

Fluid/product type	Fluid/product qty	Fluid/product cost	Misc cost	Account ID	Back out fuel ti
	0.0	0.00	0.00	00DHSOSHPP555	
	0.0	0.00	0.00	00DHSOSHPP555	
	0.0	0.00	0.00	00DHSOSHPP555	

---

External Fuel Ticket Entry

External fuel tickets

ix	State or province	Employee/operator ID	Vendor ID	Currency ID	Comments

# Exercise 2: Processing fuel tickets

- In your packet you have four fuel tickets
- Identify the type of fuel transaction for each ticket received.
- Enter each ticket into the system and process the transaction.

# Common Fuel Ticket Questions

Q1: Why do we need to enter a time on the fuel entries?

A1: The date field is a required field that can be used to audit fuel transactions. You may enter zero's for the time.

Q2: What about instances where employees do not turn in their fuel receipts for two weeks – will this be a problem as long as they are entered in order?

A2: They don't have to be entered in order, but you have to make sure that the proper equipment update selection is chosen.

Q3: Will the officers continue to turn their Voyager receipts into the Patrol Posts? If so, will they be required to log them on the DPS0049?

A3: There will be no change in your current procedures.

Q4: Are Voyager transactions manually entered inside a gas station instead of processed at the pump to be entered in the fleet system?

A4: Voyager transactions are based on the information supplied at the pump.

Q5: What is the purpose of meter 1 reading and meter 2 reading?

A5: Fleet Ohio has the ability to track two meters (i.e. an odometer and an hourmeter). The second meter is not being used.

Q6: If the fleet system does not require fuel receipts to be entered in sequence how will you know if you are missing a receipt and the date of the missing receipt?

A6: Fuel tickets can be viewed on the External Fuel Ticket screen. Data>Equipment Activity>Fueling>External Fuel Tickets or using an equipment fueling report.

Q7: What report can be run to verify Posts are entering their fuel receipts?

A7: This kind of information can be tracked on the Fuel Activity Reports.

# Common Fuel Ticket Questions

Q8: How do we know what to enter for cost on bulk fuel deliveries?

A8: The price per gallon is obtained from the same source as it is today.

Q9: Clarify delete vs. reversal.

A9: The delete function can only be carried out by DAS-OFM. The reversal function allows a user to remove data that has been entered in error from all of the affected database tables.

Q10: If portions of a fuel ticket are illegible how can I use this fleet system to research mileage and SP numbers?

A10: Various reports will be available to assist in these efforts.

# Bulk Fuel Delivery Receipts

## What are Fuel Receipts?

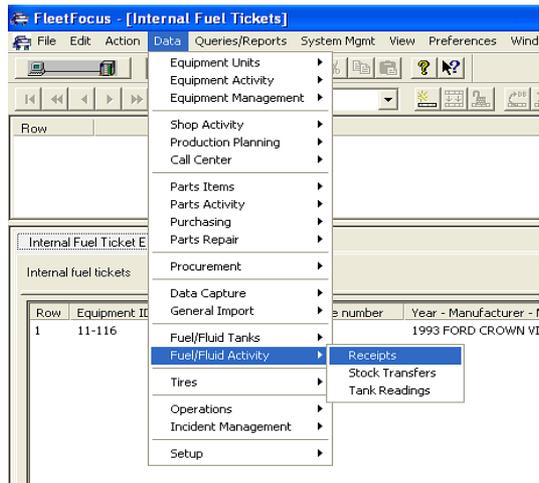
- Invoices received from fuel vendors that represent fuel deliveries for a bulk tank.
- Data needed to process a bulk fuel delivery receipts
  - Tank Id
  - Receipt date and time
  - Fuel/Fluid type
  - Quantity Received
  - Unit Price
  - Vendor ID

# Bulk Fuel Delivery Receipts

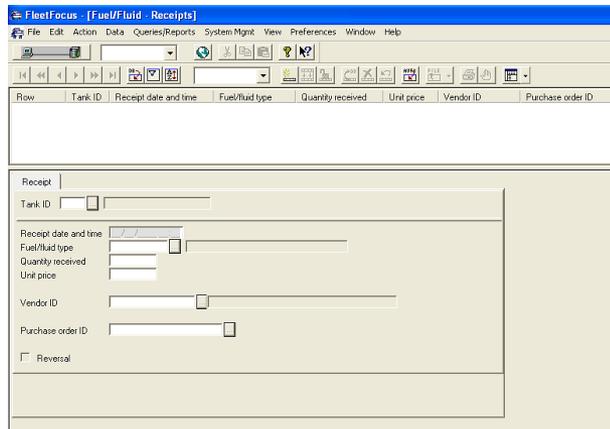
## Fuel Entry Receipt (Bulk Tanks)

### Fuel Receipts Path

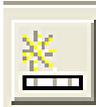
Data -> Fuel Activity -> Receipts



### Fuel Receipts Screen



### Data Entry

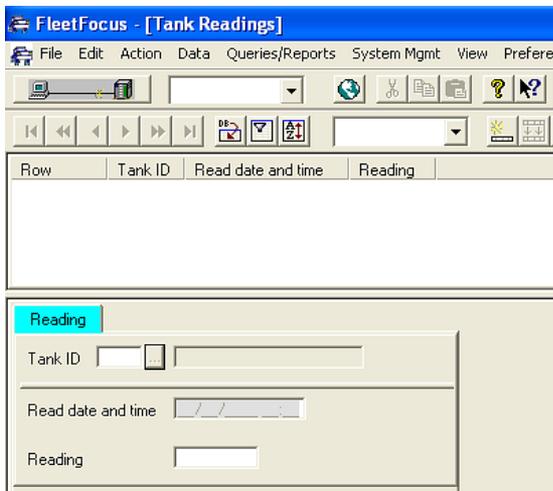
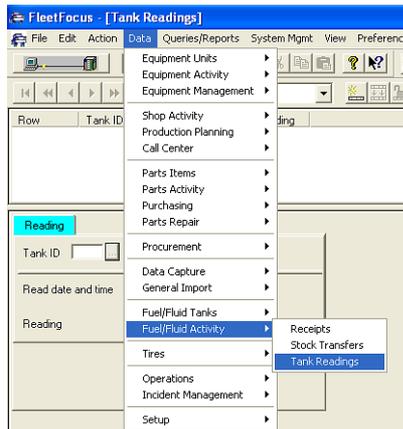
1. Select Prepare for Insert Button 
2. Tank Id
3. Receipt date and time (automatically populates with current date, needs to be adjusted to date of invoice)
4. Fuel/Fluid type(automatically populates based on tank selected)
5. Quantity Received in gallons to the nearest tenth (00.0)
6. Unit Price
7. Vendor ID
8. Select Process Button 

# Bulk Fuel Delivery Receipts

## Tank Readings

### Tank Reading Path

Data -> Fuel Activity -> Tank Readings



### Data Entry

1. Select Prepare for Insert Button 
2. Select the Tank ID from the drop-down list
3. Enter the Read date and time (you may enter 00's for the time)
4. Enter the reading in gallons to the nearest tenth (00.0)
5. Select Process Button 

# Work Orders

## What is a Work Order?

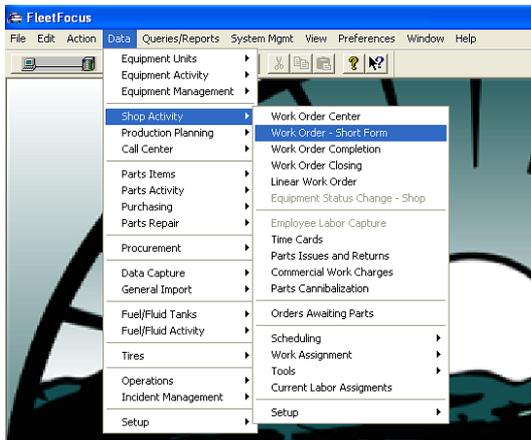
- A document that captures what repair or preventative maintenance work is performed on a vehicle.
- Details on parts, labor, or both is retrieved from vendor invoices, work orders and crash/repair reports.
- Work Orders in FleetOhio are entered using the work order short form.
- Prior to entering a work order verify that you have the vendor in the your vendor list, a completed invoice, and a completed DPS0050.

# Work Orders

## Work Order Data Entry

### Work Order Short Form –

Data -> Shop Activity->Work Order Short Form



### Data Entry

1. Work Order Id (3 parts)
  - Select the location where the work order is being entered or work performed.
  - The year(automatic)
  - The sequential number of the work order (automatic)
  - ***Make sure to write the FleetOhio work order number on the vendor invoice.***
2. Job Type – Always Repair
3. Equipment Id
4. Meter1 at time of repair (No tenths)
5. Meter validation (*Select EQ UPD if the meter reading is greater than the meter displayed on the screen.*)
6. Repair Reason (Select from List)
7. Warranty work
8. Date and Time Values on the work order. Selecting the check boxes will populate the fields with the current date. ***These dates need to be changed to transaction date.***

### Work Order Short Form-Basic Tab

A screenshot of the FleetFocus 'Work Order - Short Form' application window, specifically the 'Basic Info' tab. The form contains several input fields and checkboxes. Key fields include 'Work order ID' (with a dropdown set to '2009'), 'Equipment ID', 'Job type' (set to 'REPAIR'), 'Equipment ID', 'License number', 'Meter 1' and 'Meter 2' with validation fields, 'Life meter 1 usage', 'Employee ID', 'Vendor ID', 'Repair reason ID', 'Work class' (with 'UNKNOW' selected), 'Date and time in' (set to '09/22/2009 07:40'), and 'Date and time finished'. There are also checkboxes for 'Date and time closed', 'Date and time in service', 'PM service', and 'PM scheduled'. An 'Estimated cost' field and a 'Reference order ID' field are at the bottom.

# Work Orders

## Work Order Data Entry (Continued)

### Date/Time Details – Basic Tab

Life meter 1 usage

Employee ID  ...

Vendor ID  ...

Date and time in

Date and time finished

Date and time closed

Date and time in service

Estimated cost

Approved

Reference order ID

### Data Entry

1. **Date and time in:** Automatically populates with the date and time that the work order is opened. *Must be reset to the date of the vendor invoice or work order.*
2. **Date and time finished:** Checking the box for this field will populate the Date and time finished and the date and time in service but will not close the work order.
3. **Date and time closed:** Checking the box for this field will populate all date and time fields and will close the work order.
4. **Date and time in service:** Automatically populates when the work order is closed.

#### Notes:

Selecting the checkboxes will populate the date and time with the current value.

Any date and time can be adjusted by unselecting the checkbox and entering the date and time.

# Work Orders

## Work Order Data Entry (Continued)

### Work Order Short Form – Commercial Tab

The screenshot shows the 'Commercial' tab of the 'Work Order Short Form' in FleetFocus. The interface includes a menu bar, a toolbar, and a main form area. The 'Commercial' tab is active, displaying fields for 'Work order ID', 'Equipment ID', and 'Job status' (set to 'OPEN'). Below these fields are two data grids: 'New transactions' and 'Posted transactions'. The 'New transactions' grid has columns for 'Row', 'Task ID', 'Work accomplished code', 'Date', 'Vendor ID', 'Currency ID', 'Vendor contract ID', 'Reversal', and 'Labor'. The 'Posted transactions' grid has columns for 'Row', 'Task ID', 'Work accomplished code', 'Date', 'Vendor ID', 'Currency ID', 'Vendor contract ID', and 'Reversal'. A 'Sort by' section is visible with options for 'Date desc' and 'Task asc'.

### Data Entry

1. Task Id
2. Date (Repaired) (*date of actual repair*)
3. Vendor Id (*If vendor not found, see page 34 for adding a vendor*)
4. Currency ID
5. Labor Cost
6. Parts Cost
7. Vendor Invoice
8. Enter next line on invoice

# Work Orders

## Work Order Data Entry (Continued)

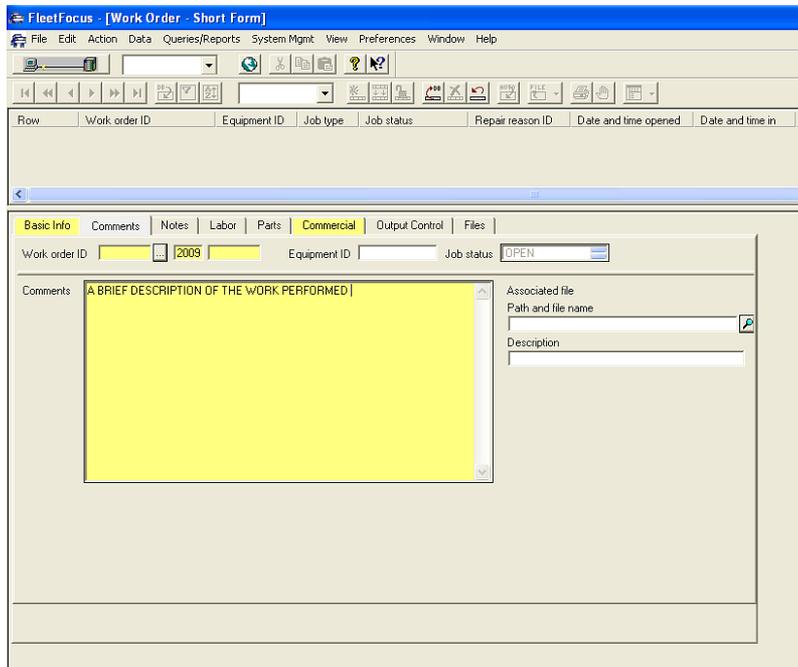
### Work Order Task Id Groups

Task ID	Description	Task ID	Description
00	MISCELLANEOUS / OTHER	12	MOTOR / ENGINE
01	TOWING SERVICES	13	POWER TRAIN/TRANSMISSION
02	CHANGE AND REPAIR TIRES	14	IGNITION SYSTEM
03	SUSPENSION SYSTEM	15	COOLING SYSTEM
04	WINDOW / GLASS - VEHICLE	16	FUEL SYSTEM
05	SOFT TRIM AND UPHOLSTERY	17	EMISSION SYSTEM
06	AUTO BODY / CAB BODY	18	EXHAUST SYSTEM
07	ELECTRICAL SYSTEMS	19	FRAME AND CHASSIS
08	BATTERY AND SERVICES	20	BRAKES / PARKING / ABS / AIR
09	LIGHTING SYSTEM	30	ACCESSORIES
10	INSTRUMENTS AND GAUGES	31	MISCELLANEOUS
11	HEATING AND AIR CONDITIONING	85	EXTERNAL MECHANICAL SYSTEMS

# Work Orders

## Work Order Data Entry (Continued)

### Work Order Short Form – Comments Tab



The screenshot displays the FleetFocus software interface for entering work order data. The window title is "FleetFocus - [Work Order - Short Form]". The menu bar includes File, Edit, Action, Data, Queries/Reports, System Mgmt, View, Preferences, Window, and Help. The toolbar contains various icons for navigation and data entry. The main form area has a tabbed interface with the following tabs: Basic Info, Comments, Notes, Labor, Parts, Commercial, Output Control, and Files. The "Comments" tab is currently selected. Below the tabs, there are input fields for "Work order ID" (containing "2009"), "Equipment ID", and "Job status" (set to "OPEN"). The "Comments" section features a large yellow text area with the placeholder text "A BRIEF DESCRIPTION OF THE WORK PERFORMED". To the right of this area, there is an "Associated file" section with fields for "Path and file name" and "Description".

### Data Entry

- Comments tab
  - A brief explanation of the work performed
- Examples
  - LOF (Lube, Oil, Filter)
  - Wash
  - Front Brakes
  - Tire Repair

# Work Orders

## Adding a Vendor

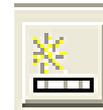
### Add a Vendor Path

Data -> Setup>Organization Structure>Vendors>Primary Information



## Data Entry

- Select Prepare for Insert Button



### Basic Tab

1. Vendor ID – 3digit city – first 11 characters of the name.
2. Name
3. Contact Name – Service Manager
4. Line 4 – City, 2 digit state, zip
5. Phone Number (xxx)xxx-xxxx (Recommended)
6. Active box – check this box

### Functions Tab

1. Equipment Repair and PM (Commercial)
2. Fuel (if applicable)

### Purchasing Info Tab

1. Currency (USD)

### Locations Tab

1. Supports All Locations (check this box)

- Select Process Button

A screenshot of the Vendor Primary Information form in the software. The form has several tabs: "Basic Info", "Functions", "Purchasing Info", "Locations", and "Services and Repair Groups". The "Basic Info" tab is active. The form contains fields for: Vendor ID, Name, Contact name, Email address, Address (Line 1, 2, 3, 4), Address add info (Line 2 addl, Line 3 addl), Phone, Fax, Sales tax rate, Accounting system number, and Description. There are also checkboxes for "Active", "Minority-owned", "Womens-owned", and "Drug-free", and a field for "Expiration date".

# Work Orders

## Reversals

**FleetFocus - [Work Order - Short Form]**

File Edit Action Data Queries/Reports System Mgmt View Preferences Window Help

Row	Work order ID	Equipment ID	Job type	Job status	Repair reason ID	Date and time opened	Date and time closed
2	VOYWD-2010-9084	32-401	REPAIR	CLOSED	J	04/22/2010 11:53	04/09/2010
3	VOYWD-2010-568	32-401	REPAIR	CLOSED	J	01/20/2010 07:39	01/11/2010
4	VOYWD-2010-567	32-401	REPAIR	CLOSED	J	01/20/2010 07:39	01/11/2010
5	VOYWD-2010-35	32-401	REPAIR	CLOSED	J	01/13/2010 09:23	01/06/2010

Basic Info Comments Notes Labor Parts Commercial Output Control Files

Work order ID: VOYWO 2010 567 Equipment ID: 32-401 Job status: CLOSED

Standard Job ID: [ ]  Apply standard job template

**New transactions**

Row	Task ID	Work accomplished code	Date	Vendor ID	Currency ID	Vendor contract ID	Reversal	Labor
*	A		01/11/2010	VOY-UPLOAD	USD		X	0.00
*	A		01/11/2010	COL-BP PROCARE	USD			0.00
*								

Cost posted: 27.95 Displaying 1 of 1 rows

**Posted transactions**

Row	Task ID	Work accomplished code	Date	Vendor ID	Currency ID	Vendor contract ID	Re
1	A		01/11/2010	VOY-UPLOAD	USD		
*							

Sort by:  Date desc  Task asc

## Data Entry

1. Select Prepare for Update Button 
2. Re-enter data in new transaction that matches the entire transaction as it appears in Posted Transactions
3. Select Reversal box in transaction line you just entered
4. Enter transaction again this time with corrected information on second line of New Transaction box
5. Select Process Button 

# Work Orders

## Invoice Components

### Sample Vendor Invoice

CUSTOMER #: 4255 193895

OHIO STATE PATROL  
3149 FRANZ RD  
MEDINA, OH 44256  
HOME:330-225-0800 CONT:N/A  
BUS: CELL:

\*ACCOUNTING\*

PAGE 1  
\*\* PRE-INVOICE \*\*  
SERVICE ADVISOR: 4875 PAUL WIDENMEYER

**GANLEY**  
LINCOLN MERCURY BRUNSWICK  
1700 PEARL ROAD  
BRUNSWICK, OH 44212  
(330) 225-3700  
SERVICE · PARTS · SALES  
Service with "Personal Attention"

COLOR	YEAR	MAKE/MODEL	VIN	LICENSE	MILEAGE IN/OUT	TAG
	07	FORD CROWN VICTORIA	2FAHP71W97X126613	1419	89505/89509	TE3

DEL. DATE	PROD. DATE	WARR. EXP.	PROMISED	PO NO.	RATE	PAYMENT	INV. DATE
01JAN08 DD			17:00 14AUG09			CASH	14AUG09

R.O. OPENED: READY: OPTIONS: W-COMP:Z DLR:64R302 ENG:4.6 Liter\_SOHC

LINE	OPCODE	TECH	TYPE	A/HRS	S/HRS	COST	SALE	COMP	LIST	NET	TOTAL
PERFORM	90	000	MILE SERVICE								
	99P		CHANGE OIL & FILTER RESET REMINDER LIGHT TOP								
			DRY FLUID LEVELS AND PERFORM MULTI POINT								
			INSPECTION								
	1714CPOSP		0.30	0.30	270					6.95	6.95
			BRAKE INSPECTION								
	1714CPOSP		0.50	0.50	450					19.95	19.95
	132P		FUEL FILTER REPLACEMENT (PROBE, ASPIRE & FESTIVA EXTRA)								
	1714CPOSP		0.50	0.50	450	2000				20.00	20.00
	87P		AUTOMATIC TRANSMISSION/TRANSAXLE FLUID DRAIN AND FILL. INCLUDES UP TO 6 QUARTS OF OIL.								
	1714CPOSP		1.20	1.20	1080	1800				48.00	48.00
	BGBF B.G.		BRAKE FLUID FLUSH								
	1714CPOSP		0.90	0.90	720	1600				36.00	36.00
	1	25	2500	0	0	0					
			OIL			376	500	0	7.24	5.00	5.00
	6	XO*5W20*QSP	OIL								
			ENGINE			2190	1800	0	4.86	2.50	15.00
	1	2M5Z*9155*CA	FILTER ASY								
			FUEL			385	1574	0	19.67	15.74	15.74
	1	FGA2*7A098*A	SCREEN ASY			1510	2800	430	35.78	28.62	28.62
	6	XT*5*OM	FLUID								
			TRANSMISSION			2274	2430	0	5.06	4.05	24.30
	1	8503Z	BRAKE FLUSH			1360	2240	0	28.00	22.40	22.40
	B**		REPLACE FRONT AND REAR BRAKE CALIPERS								
	1400		REPLACE FRONT AND REAR BRAKE CALIPERS								
			1714CPOSP	3.60	3.60	3240	14400			144.00	144.00
	1	6W1Z*2B120*AA	CALIPER								
			ASY - BRAKE - LESS PAD			14021	18694	0	233.69	186.94	186.94
	1	7W1Z*2553*A	CALIPER ASY								
			- BRAKE - LESS PAD			7598	10130	0	125.63	101.30	101.30
	1	7W1Z*2553*A	CALIPER ASY								
			- BRAKE - LESS PAD			7598	10130	0	125.63	101.30	101.30

DESCRIPTION	TOTALS
LABOR AMOUNT	
PARTS AMOUNT	
GAS, OIL, LUBE	
SUBLET AMOUNT	
MISC. CHARGES	
TOTAL CHARGES	
LESS INSURANCE	
SALES TAX	
PLEASE PAY THIS AMOUNT	

ON BEHALF OF SERVICING DEALER, I HEREBY CERTIFY THAT THE INFORMATION CONTAINED HEREON IS ACCURATE UNLESS OTHERWISE SHOWN. SERVICES DESCRIBED WERE PERFORMED AT NO CHARGE TO OWNER. THERE WAS NO INDICATION FROM THE APPEARANCE OF THE VEHICLE OR OTHERWISE, THAT ANY PART REPAIRED OR REPLACED UNDER THIS CLAIM HAD BEEN CONNECTED IN ANY WAY WITH ANY ACCIDENT, NEGLIGENCE OR MISUSE. RECORDS SUPPORTING THIS CLAIM ARE AVAILABLE FOR (1) YEAR FROM THE DATE OF PAYMENT NOTIFICATION AT THE SERVICING DEALER FOR INSPECTION BY MANUFACTURER'S REPRESENTATIVE.

STATEMENT OF DISCLAIMER  
The factory warranty covers all of the warranties with respect to the sale of this equipment. The Seller hereby expressly disclaims all warranties, either express or implied, including any implied warranty of merchantability of goods for a particular purpose. Seller neither assumes nor delegates any other person to assume for it any liability in connection with the sale of this equipment.

ISSN:13	DEALER, GENERAL MANAGER OR AUTHORIZED PERSON (DATE)	CUSTOMER SIGNATURE

# Work Orders

## Sample Work Order – SP-1419

### Basic Tab

The screenshot displays the 'FleetFocus - [Work Order - Short Form]' application window. The interface includes a menu bar (File, Edit, Action, Data, Queries/Reports, System Mgmt, View, Preferences, Window, Help) and a toolbar with various icons. Below the toolbar is a grid header with columns: Row, Work order ID, Equipment ID, Job type, Job status, Repair reason ID, Date and time opened, Date and time in, Date and time finished, Date and time closed, PM Scheduled, and Work order location.

The 'Basic Info' tab is active, showing the following data:

- Work order ID: DPSW24
- Equipment ID: SP-1419
- Job status: OPEN
- Job type: REPAIR
- Equipment ID: SP-1419
- License number: 11419
- Meter 1: 89505
- Meter 1 validation: EQ UPD
- Life meter 1 usage: 71965
- Meter 2:
- Meter 2 validation:
- Employee ID:
- Vendor ID:
- Repair reason ID: OTHER
- Work class:
- Warranty work: YES, NO, UNKNOWN
- PM service:
- PM scheduled:
- Date and time in: 12/15/2009 09:45
- Date and time finished:
- Date and time closed:
- Date and time in service:
- Estimated cost:
- Approved:
- Reference order ID:

The Windows taskbar at the bottom shows the system is ready, with the time 9:46 AM and several open applications including 'Inbox - Microsoft Out...', 'FleetFocus - [Work O...', and 'FleetFocus - [Work O...'. A 'start' button is visible on the left side of the taskbar.

# Work Orders

## Sample Work Order – SP-1419 (Continued)

### Commercial Tab

**FleetFocus - [Work Order - Short Form]**

File Edit Action Data Queries/Reports System Mgmt View Preferences Window Help

Standard job ID:   Apply standard job template

Work order ID:    Equipment ID:  Job status:

Row	Task ID	Work accomplished code	Date	Vendor ID	Currency ID	Vendor contract ID	Reversal	Labor
*			12/15/2009					0.00
*								

Posted transactions  Cost posted  Displaying  of  rows

Y ID	Currency ID	Vendor contract ID	Reversal	Labor cost	Labor cost taxable	Sales tax rate
ANLEY	USD			6.95		0.000
ANLEY	USD			19.95		0.000
ANLEY	USD			20.00		0.000
ANLEY	USD			48.00		0.000
ANLEY	USD			36.00		0.000

Sort by:  
 Date desc  
 Task asc

# Work Orders

## Sample Work Order – SP-1419 (Continued)

### Comments Tab

The screenshot displays the FleetFocus software interface for a work order. The title bar reads "FleetFocus - [Work Order - Short Form]". The menu bar includes "File", "Edit", "Action", "Data", "Queries/Reports", "System Mgmt", "View", "Preferences", "Window", and "Help". The toolbar contains various icons for file operations and navigation. Below the toolbar is a data table with the following content:

Row	Work order ID	Equipment ID	Job type	Job status	Repair reason ID	Date and time opened	Date and time in	Date and time I
1	DPSW24-2009-1	SP-1419	REPAIR	OPEN	J	12/15/2009 09:45	12/15/2009 09:45	

Below the table is a navigation bar with a back arrow. The main interface has several tabs: "Basic Info", "Comments", "Notes", "Labor", "Parts", "Commercial", "Output Control", and "Files". The "Comments" tab is active. The form displays the following fields:

- Work order ID: DPSW24, 2009, 1
- Equipment ID: SP-1419
- Job status: OPEN
- Comments: LOF  
BRAKE INSPECTION  
FUEL FILTER
- Associated file: Path and file name (with a search icon)
- Description: (empty text box)

## Exercise 3: Create a New Work Order

- Create a new work order using either one you brought with you or the one included in your packet.

# Common Work Order Questions

Q1: What were the four blocks for date & time on the work order short form? Is there anyway to delete what we do not need or can fields not auto populate where manual entry is necessary?

A1: The first of the four blocks auto populates with the current date and time. This should be changed to Invoice Date and Time (time can be 00:00). The other three Date/Time fields have check boxes next to them. Check the middle box which will cause all three fields to populate with current date/time.

Q2: What do you put for the work order ID? Location where work is being done or where the work order is being entered?

A2: Work order ID is to be populated with the location where the work is performed.

Q3: Work orders – what does the ‘commercial’ tab mean?

A3: The Commercial tab is used to enter work order data from commercial vendor (Task ID, Cost, etc.).

Q4: On the Commercial screen do we make an entry for each item on the work order?

A4: Yes

Q5: Can open work orders be closed at the end of the month when we receive the end of the month invoice?

A5: Yes

Q6: It was stated a report can be searched for the month it was entered. It seems like it would be more accurate to search by the service date. Why is by month entered?

A6: The filter screen can retrieve work orders in a number of ways. The search by month was just one possible example, but not the only way.

Q7: Can we print the work orders once entered?

A7: Yes, work orders will print when they are opened.

# Common Work Order Questions

Q8: Clarify terminology such as 'date done'. Is this the date the work order is dated or the date the work order is entered in the fleet system?

A8: Refer to page 30 (date/Time Details)

Q9: Can unneeded work order task IDs be deleted?

A9: No. This system is used state-wide and while DAS may not use certain task IDs, other agencies may.

# Updating Locations

Data-> Equipment Units -> Fleet Equipment/Locations

The screenshot shows the FleetFocus software interface. The top part is a table with columns: Row, Equipment ID, Model year, Manufacturer ID, Model ID, License number, Operator ID, Department ID, Latest meter 1 reading, and Latest meter 2 reading. Row 11 is selected, showing Equipment ID SP-0336, Model year 2005, Manufacturer ID FORD, Model ID CROWN VIC PP, License number 0335, Operator ID, Department ID DPS-P148, Latest meter 1 reading 50253, and Latest meter 2 reading 0.

Below the table is a detailed view of the selected unit. It shows fields for Equipment ID (SP-0336), Manufacturer (2009 FORD CROWN VIC PP 2009 FORD CRO), and a 'New equipment unit' button. The 'Location type' section includes dropdowns for Assigned PM (DPSW13), Assigned repair (DPSW13), and Assigned mobile. The 'Station' section includes dropdowns for Station (DPSENF), Stored, Current, and Last fuel. The 'Access rights' section includes a dropdown for Access rights (DPSW13).

## Data Entry

- Select vehicle for the location update from the grid above.
- Select Prepare for update 
- Four fields to be updated on this screen
  - Assigned PM
  - Assigned Repair
  - Station
  - Access Rights
- Clear fields to be updated
- Select Assigned PM, Assigned Repair, Access Rights from Choice List (Values selected must match)
- Select Station Location from Choice List (if applicable)
- Select Process Button 

# Updating Locations

Data-> Equipment Units -> Fleet  
Equipment/Assignments

The screenshot shows the FleetFocus software interface. The top part is a table with columns: Row, Equipment ID, Model year, Manufacturer ID, Model ID, License number, Operator ID, Department ID, and Latest meter 1 read. Row 11 is highlighted. Below the table is a detailed form for editing a unit. The form has tabs for various categories: Individual PM, Inspections, Codes, Recurring Costs, Credit Cards, Acquisition, Registration, Multi-jurisdictional, Ownership/Depreciation, Warranty, Replacement/Disposition, Notes, Files, Position Info, Add'l Data, Relationships, Basic Info, Meter Info, Classes, Locations, Assignments, Accounts, Status, Motor Pool, Authorization, Comments, and Class PM. The 'Assignments' tab is active. The form fields include: Equipment ID (SP-0336), Operator ID, Operator name, Department ID (DPS-P148), Department to notify for PM (DPS-P148), On temporary loan to department, Tax code ID, Company ID (DPS-OH), Associated equipment ID, GPS equipment ID, and Fleet number.

Row	Equipment ID	Model year	Manufacturer ID	Model ID	License number	Operator ID	Department ID	Latest meter 1 read
1	SP-0205	2007	FORD	CROWN VIC PP	0205		DPS-P10A	68571
2	SP-0226	2006	DODGE	CARAVAN FFV	46-73		DPS-P1000	55160
3	SP-0241	2007	FORD	CROWN VIC PP	0241		DPS-P1000	45711
4	SP-0246	2009	FORD	CROWN VIC FFV	0246		DPS-P187	33381
5	SP-0250	2008	FORD	CROWN VIC PP	0250		DPS-P10A	63279
6	SP-0270	2008	CHEVROLET	IMPALA FFV	0270		DPS-P1000	26562
7	SP-0277	2009	FORD	CROWN VIC FFV	0277		DPS-P1000	23888
8	SP-0289	2007	FORD	CROWN VIC PP	0289		DPS-P120	50823
9	SP-0320	2001	CHEVROLET	MALIBU	46-138		DPS-P1000	102460
10	SP-0322	2007	FORD	CROWN VIC PP	0322		DPS-P181	72875
11	SP-0336	2009	FORD	CROWN VIC PP	0336		DPS-P148	50263
12	SP-0344	2008	CHEVROLET	IMPALA FFV	0344		DPS-P1000	43891
13	SP-0348	2007	FORD	CROWN VIC PP	0348		DPS-P148	81398

## Data Entry

- Select Prepare for update 
- Three fields available for update
- Clear field to be updated
- Department ID and Department (Values selected must match)
- Select Process Button 

# Updating Locations

Data-> Equipment Units -> Fleet  
Equipment/Accounts

The screenshot shows the FleetFocus software interface. At the top is a menu bar with options: File, Edit, Action, Data, Queries/Reports, System Mgmt, View, Preferences, Window, Help. Below the menu is a toolbar with various icons. A table of equipment units is displayed, with the following data:

Row	Equipment ID	Model year	Manufacturer ID	Model ID	License number	Operator ID	Department ID
1	SP-0205	2007	FORD	CROWN VIC PP	0205		DPS-P10A
2	SP-0226	2006	DODGE	CARAVAN FFV	46-73		DPS-P1000
3	SP-0241	2007	FORD	CROWN VIC PP	0241		DPS-P1000
4	SP-0246	2009	FORD	CROWN VIC FFV	0246		DPS-P187
5	SP-0250	2008	FORD	CROWN VIC PP	0250		DPS-P10A
6	SP-0270	2008	CHEVROLET	IMPALA FFV	0270		DPS-P1000
7	SP-0277	2009	FORD	CROWN VIC FFV	0277		DPS-P1000
8	SP-0289	2007	FORD	CROWN VIC PP	0289		DPS-P120
9	SP-0320	2001	CHEVROLET	MALIBU	46-138		DPS-P1000
10	SP-0322	2007	FORD	CROWN VIC PP	0322		DPS-P181
11	SP-0336	2009	FORD	CROWN VIC PP	0336		DPS-P148
12	SP-0344	2008	CHEVROLET	IMPALA FFV	0344		DPS-P1000
13	SP-0348	2007	FORD	CROWN VIC PP	0348		DPS-P148

Below the table is a form for updating an account. The form has several tabs: Individual PM, Inspections, Codes, Recurring Costs, Credit Cards, Acquisition, Registration, Multi-jurisdiction, Ownership/Depreciation, Warranty, Replacement/Disposition, Notes, Files, Position Info, Addl Data, Relat. The 'Accounts' tab is selected. The form contains the following fields:

- Equipment ID: SP-0336
- Account ID: 00DHSOSHPP148
- Revenue account ID: [empty]
- Account apportionment for billing table:

Row	Delete	Account ID	Account name	Percentage
*				

## Data Entry

- Select Prepare for update 
- Clear Account ID field
- Select a new Account ID from the choice list 
- Select Process Button 

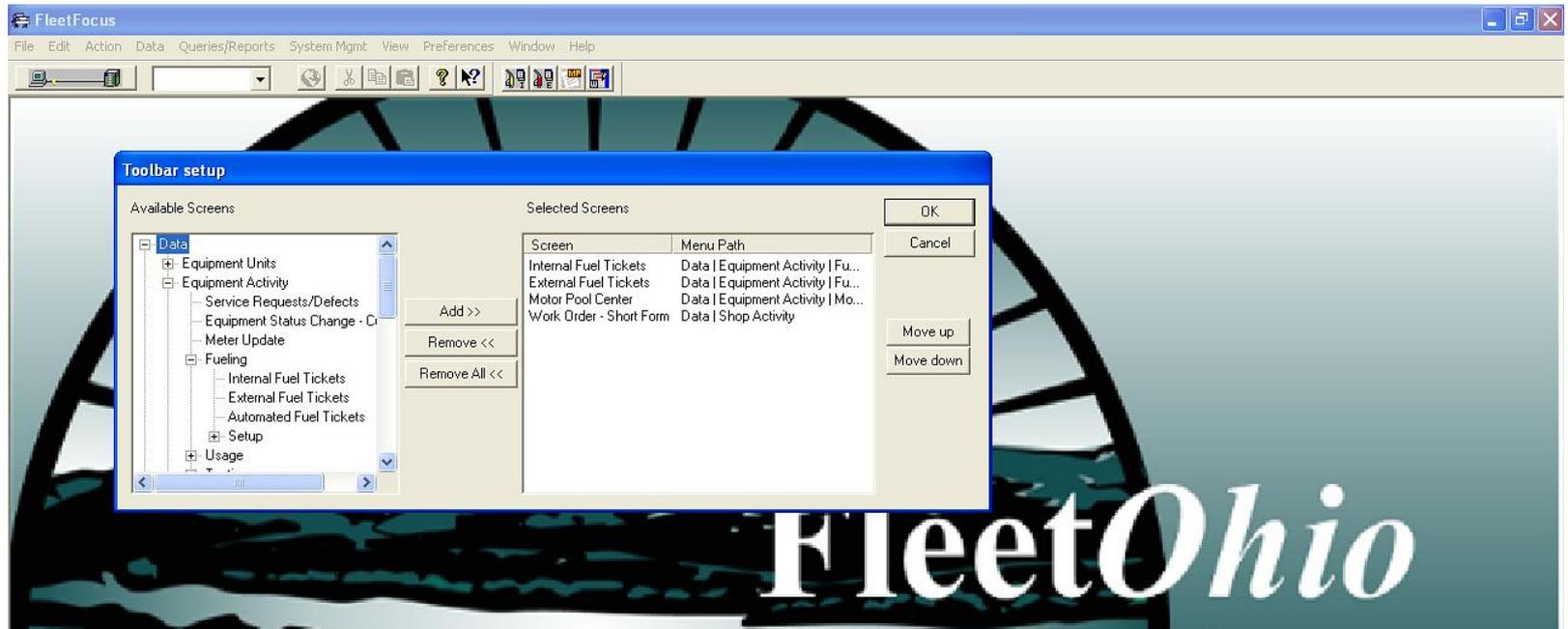
# Exercise 4: Updating Locations

- In this exercise retrieve a vehicle from your inventory and change it's location within your district.

# Advanced Options in Fleet Ohio

## Creating Toolbar Buttons

- Navigate to screen in the left pane
- Click Add  
**Menu Path**  
Preferences -> Toolbar -> Setup.
- Remember to Save for the changes to take effect.



# Selecting and Filtering Data

## Selecting/Filtering Data

The screenshot displays the FleetFocus application interface. At the top, a menu bar includes File, Edit, Action, Data, Queries/Reports, System Mgmt, View, Preferences, Window, and Help. Below the menu is a toolbar with various icons. A data table is visible with columns: Row, Equipment ID, Model year, Manufacturer ID, Model ID, License number, Operator ID, Department ID, Latest meter 1 reading, Latest meter 2 reading, Equipment type, and Serial number. A callout bubble points to a filter icon in the toolbar, labeled "Select Filter Button".

A "Filter" dialog box is open, showing a list of fields to filter on. The fields include: Equipment ID, Model year, Manufacturer ID, Model ID, Equipment type, Color, Serial number, Asset number, Meter types class, Maintenance class, PM program class, Rental rates class, Asset category ID, Stored location ID, Assigned PM location ID, Assigned repair location ID, Station location ID, Vehicle location, Building location, Other location data, Operator ID, and Operator name. A callout bubble points to this list, labeled "Select Fields to Filter on".

Below the data table, there are several tabs for different views: Individual PM, Inspections, Codes, Recurring Costs, Credit Cards, Acquisition, Reg, Ownership/Depreciation, Warranty, Replacement/Disposition, Notes, Files, Position Info, Basic Info, Meter Info, Classes, Locations, Assignments, Accounts, Status, Motor Pool, and Authorizations. Below these tabs are various input fields for data entry, including Equipment ID, Model year, Manufacturer ID, Model ID, Equipment type, Description, Color, Serial number, Asset number, and Path and file name.

# Selecting and Filtering Data

## Selecting/Filtering Data (Continued)

Fleet Equipment screen  
*List of equipment units with  
Equipment ID 103*

Filter

Get Data Close Clear Cancel

Equipment ID 103

Model year

Manufacturer ID

Model ID

Equipment type

Serial number

Asset number

Meter types class

Maintenance class

PM program class

Standards class

Rental rates class

Resources class

SLA equipment category

Stored location ID

Assigned PM location ID

Assigned repair location ID

Station location ID

Operator ID

Operator name

Department ID

Company ID

Account ID

Fleet Equipment screen  
*List of Ford equipment units assigned to  
Repair location 01*

Filter

Get Data Close Clear Cancel

Equipment ID

Model year

Manufacturer ID FORD

Model ID

Equipment type

Serial number

Asset number

Meter types class

Maintenance class

PM program class

Standards class

Rental rates class

Resources class

SLA equipment category

Stored location ID

Assigned PM location ID

Assigned repair location ID 01

Station location ID

Operator ID

Operator name

Department ID

Company ID

Account ID

Work Order Center screen  
*Open repair orders at Repair location 01*

Filter

Get Data Close Clear Cancel

Work order location ID 01

Work order year

Work order number

Job status OPEN

Current work delay ID

From open date

To open date

Job type REPAIR

Equipment ID

Service status

Priority ID

Tech/vendor

Repair reason ID

Work class

Warranty work UNKNOWN

Date and time opened

Date and time closed

License number

Department ID

Reference order ID

User ID order opened by

Multi-unit project ID

Include messages for associated components

In any filter dialog box, click the Get Data button to fill the grid with matching data

# Selecting and Filtering Data

## Selecting/Filtering Data (Continued)

### Choice Lists and Wildcards

#### Choice Lists

Click the button at the right of the field to display a list of valid choices.

Manufacturer ID	<input type="text"/>
-- NOT ASSIGNED	
ADVAN	ADVANCE
ALLIS	ALLIS CHALMERS
AMERL	AMERICAN LINCOLN
ANTHO	ANTHONY
BAKER	BAKER
BTLIF	B. T. LIFT ELECTRIC HANDJACK
BUICK	BUICK
CAPAC	CAPACITY
CATER	CATERPILLAR

Enter starting value(s) to limit the choice list.

Manufacturer ID	F	<input type="text"/>
FIBER	FIBER CORP.	
FORDX	FORD MOTOR COMPANY	
FRGHT	FREIGHTLINER CORP	
FRUHF	FRUEHAUF TRAILER COMPANY	

#### Wildcards: % and \_

% = "anything"

All equipment IDs starting with F00:

Equipment ID	F00%
--------------	------

All equipment with asset numbers ending with 01:

Asset number	%01
--------------	-----

All equipment with serial numbers containing 1X05:

Serial number	%1X05%
---------------	--------

\_ = "any single character"

All equipment with 4-character repair locations starting with 503:

Assigned repair location	503_
--------------------------	------

All equipment with 5-character maintenance classes starting with 83 and ending with 06:

Maintenance class	83_06
-------------------	-------

# Exercise 5: Filtering Data

- Complete both filter exercises included in your packet.

## Filter Exercise – Looking at the Big Picture

How many Ford Taurus do you have at your location?

Location: \_\_\_\_\_ Number: \_\_\_\_\_

How many equipment units at your location have 123 at the end of the Serial number?

Location: \_\_\_\_\_ Number: \_\_\_\_\_

How many equipment units at your location have a 1994 model year?

Location: \_\_\_\_\_ Number: \_\_\_\_\_

How many Ford Taurus are there at the following locations?

Location: \_\_\_\_\_ Number: \_\_\_\_\_

Location: \_\_\_\_\_ Number: \_\_\_\_\_

Location: \_\_\_\_\_ Number: \_\_\_\_\_

## Filter Exercise – Equipment ID's

In the spaces below, write five old equipment numbers that you know. Then complete as much of the information as you can by looking in FleetFocus FA.

Equipment ID No.	Serial number or VIN	Equipment Type
------------------	----------------------	----------------

_____	_____	_____
_____	_____	_____
_____	_____	_____
_____	_____	_____

What are the model years for the following equipment units?

Equipment ID: \_\_\_\_\_ Year: \_\_\_\_\_

Equipment ID: \_\_\_\_\_ Year: \_\_\_\_\_

Equipment ID: \_\_\_\_\_ Year: \_\_\_\_\_

# Fleet Ohio Online Reports

- Fleet reports are used through an internet browser like Internet Explorer, Netscape or others.
- Go to <http://fleetohio.das.ohio.gov> to begin.



# Fleet Ohio Online Reports

## InfoCenter Home Page

**Please Log In...**

User ID:

Password:

**Welcome**

**Welcome to the new FleetOhio InfoCenter Home Page!**

Please use the window on the left to log in with your FleetOhio user id and password.

If you have any problems with your User ID, please contact the [FleetOhio Administrator](#).

**Quick Links**

- [Office Of Fleet Management Website](#)
- [NCSFA Website](#)
- [NAFA Home Page](#)

Enter **FleetOhio User Id** and **Password** then click “Log In”

# Fleet Ohio Online Reports

## InfoCenter Main Page

MAXIMUS Asset Solutions Home Reporting

FASuite InfoCenter  
Keeping your business in Focus...

Welcome DMEXYRLE Home Logoff

**Quick Links**

- Office Of Fleet Management Website
- NCSFA Website
- NAFA Home Page

**Welcome**

**Welcome to the new FleetOhio InfoCenter Home Page!**

Please use the window on the left to log in with your FleetOhio user id and password.

If you have any problems with your User ID, please contact the **FleetOhio Administrator**.

Links to useful websites

Click on tabs to use various InfoCenter tools  
- In this case the Reporting tab.

# Fleet Ohio Online Reports

## Reporting Tab

Reports are divided into categories.

Reports in the selected category will display here.

The screenshot shows the FASuite InfoCenter Reporting Tab interface. At the top, there is a navigation bar with the MAXIMUS Asset Solutions logo on the left, the FASuite InfoCenter logo in the center, and a "Logoff" button on the right. The "Reporting" tab is selected, and a list of report categories is displayed on the left side. The main content area is currently empty, with a "My Favorites" label at the top.

MAXIMUS Asset Solutions Home Reporting Logoff

**FASuite InfoCenter**  
*Keeping your business in Focus...*

Welcome DMB311RL! Home

**Reporting**

**My Favorites**  
Reports:

- Cost Analysis
- Equipment Info
- Fuel Info
- Incident Info
- Linear Info
- Operations Info
- Parts Info
- Purchasing Info
- Shop Operations

My Favorites

# Fleet Ohio Online Reports

## Reporting Tab (Continued)

Click on category to display available reports

List of reports

Click View to run a report

**Reporting**

**My Favorites Reports:**

- Cost Analysis**
- Equipment Info
- Fuel Info
- Incident Info
- ⊕ Linear Info
- Operations Info
- Parts Info
- Purchasing Info
- ⊕ Shop Operations

**Cost Analysis**

<a href="#">Operational Cost Analysis by Department</a>	<a href="#">View</a>	<a href="#">About</a>
Operational Cost Analysis by Equipment	<a href="#">View</a>	<a href="#">About</a>
Operational Cost Analysis by Maintenance Class	<a href="#">View</a>	<a href="#">About</a>
Operational Cost Summary by Department	<a href="#">View</a>	<a href="#">About</a>
Operational Cost Summary by Maintenance Class	<a href="#">View</a>	<a href="#">About</a>

# Fleet Ohio Online Reports

## Choosing Report Parameters

ReportViewer - Microsoft Internet Explorer

File Edit View Favorites Tools Help

Address http://fleetohio.das.ohio.gov/Reporting/ReportViewer.aspx?ReportName=Operations%20Info%20Equipment%20Assig

ReportViewer Add Tab

Show Report Equipment Assignments Utilization t Add to Favorites

Enter Agency or Department Id e.g. DAS, DAS-GDFT

ADA-ADAS

Add Remove Remove All

Enter Beginning and Ending Dates

From (MM/DD/YYYY)\*

to [Select a date function...]

(MM/DD/YYYY)\*

Select Class

ALL

Add Remove Remove All

Then click 'Show Report' to run.

Complete all of the prompts.

# Fleet Ohio Online Reports

## Choosing Report Parameters (Displayed Report)

1 of 9

powered by crystal

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### Operational Cost Analysis by Department

12/1/2005 to 4/19/2006  
 Agency/Department- DAS  
 Manufacturers: ALL Model: ALL

---

**DAS - DAS-OFFICE OF FLEET MANAGEMENT**

**01-08 - MID-SIZE SEDAN**

Equip Id	Year	Manufacturer	Model	Usage	Fuel Qty	Fuel Cost	Repair Cost	PM Cost	Total Maint Cost	MPG	Op CPM	CPG	Del Date	Retire Date
32-285	2001	FORD	TAURUS FFV	4,870	183.07	\$378.07	\$111.50	\$19.95	\$131.45	26.60	\$0.10	\$2.07	05/15/2001	
9-32-127	2002	FORD	TAURUS FFV	1,592	0.00	\$0.00	\$0.00	\$0.00	\$0.00	0.00	\$0.00	\$0.00	03/08/2002	12/27/2005
<b>Class Total:</b>				<b>2</b>	<b>6,862</b>	<b>183.07</b>	<b>\$378.07</b>	<b>\$111.50</b>	<b>\$18.95</b>	<b>\$131.45</b>	<b>27.48</b>	<b>\$0.07</b>	<b>\$2.00</b>	
<b>Department Total:</b>				<b>2</b>	<b>6,862</b>	<b>183.07</b>	<b>\$378.07</b>	<b>\$111.50</b>	<b>\$18.95</b>	<b>\$131.45</b>	<b>27.48</b>	<b>\$0.07</b>	<b>\$2.00</b>	

**DAS-GDFT - OFFICE OF FLEET MANAGEMENT**

**01-08 - MID-SIZE SEDAN**

Equip Id	Year	Manufacturer	Model	Usage	Fuel Qty	Fuel Cost	Repair Cost	PM Cost	Total Maint Cost	MPG	Op CPM	CPG	Del Date	Retire Date
32-107	2000	FORD	TAURUS FFV	4,422	162.50	\$341.80	\$190.99	\$19.95	\$210.94	27.21	\$0.12	\$2.10	03/15/2000	
32-111	2001	FORD	TAURUS FFV	5,334	163.22	\$354.57	\$44.27	\$0.00	\$44.27	32.68	\$0.07	\$2.17	05/15/2001	
32-143	2000	FORD	TAURUS FFV	7,464	285.22	\$887.58	\$49.50	\$39.90	\$89.40	26.17	\$0.09	\$2.05	03/15/2000	
32-211	2003	FORD	TAURUS FFV	5,817	161.31	\$325.03	\$42.00	\$73.95	\$115.95	26.05	\$0.08	\$2.01	04/07/2003	
32-290	2001	FORD	TAURUS FFV	5,254	206.85	\$422.50	\$84.08	\$19.95	\$104.03	25.40	\$0.10	\$2.04	05/15/2001	
<b>Class Total:</b>				<b>6</b>	<b>28,291</b>	<b>979.11</b>	<b>\$2,081.68</b>	<b>\$410.84</b>	<b>\$169.75</b>	<b>\$684.68</b>	<b>28.89</b>	<b>\$0.09</b>	<b>\$2.00</b>	

**01-10 - MID-SIZE STATION WAGON**

Equip Id	Year	Manufacturer	Model	Usage	Fuel Qty	Fuel Cost	Repair Cost	PM Cost	Total Maint Cost	MPG	Op CPM	CPG	Del Date	Retire Date
32-190	2001	FORD	TAURUS SW	4,274	158.03	\$337.09	\$163.60	\$0.00	\$163.60	27.05	\$0.12	\$2.13	04/27/2001	
<b>Class Total:</b>				<b>1</b>	<b>4,274</b>	<b>158.03</b>	<b>\$337.09</b>	<b>\$163.60</b>	<b>\$0.00</b>	<b>\$163.60</b>	<b>27.05</b>	<b>\$0.12</b>	<b>\$2.00</b>	

**02-16 - MINI PASSENGER VAN**

Equip Id	Year	Manufacturer	Model	Usage	Fuel Qty	Fuel Cost	Repair Cost	PM Cost	Total Maint Cost	MPG	Op CPM	CPG	Del Date	Retire Date
32-178	2002	DODGE	CARAVAN FFV	6,931	236.11	\$491.14	\$3.00	\$19.95	\$22.95	29.35	\$0.07	\$2.08	05/10/2002	
<b>Class Total:</b>				<b>1</b>	<b>6,931</b>	<b>236.11</b>	<b>\$491.14</b>	<b>\$3.00</b>	<b>\$22.95</b>	<b>29.35</b>	<b>\$0.07</b>	<b>\$2.00</b>		
<b>Department Total:</b>				<b>7</b>	<b>39,486</b>	<b>1,373.25</b>	<b>\$2,869.81</b>	<b>\$677.44</b>	<b>\$173.70</b>	<b>\$751.14</b>	<b>28.76</b>	<b>\$0.07</b>	<b>\$2.08</b>	

# Fleet Ohio Online Reports

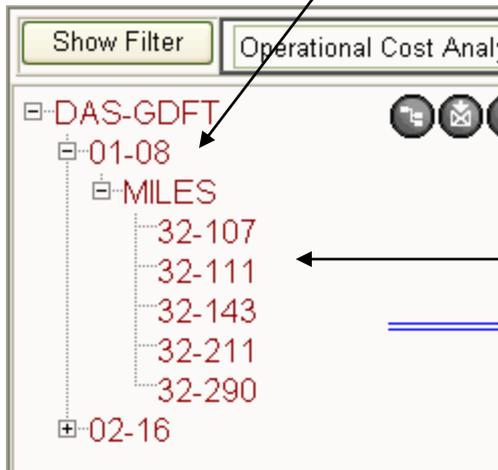
## Menu Bar (Show/Hide Group Tree)

The menu bar has useful buttons for navigating, printing and exporting

Like this report? Click 'Add to Favorites'. The report will now be displayed on the Reporting home page



Click 'Show/Hide Group Tree' to display levels of detail

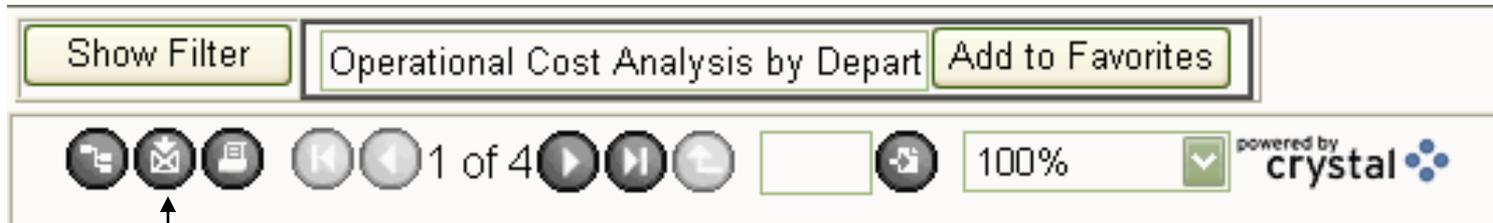


Click on an individual item to display just that item



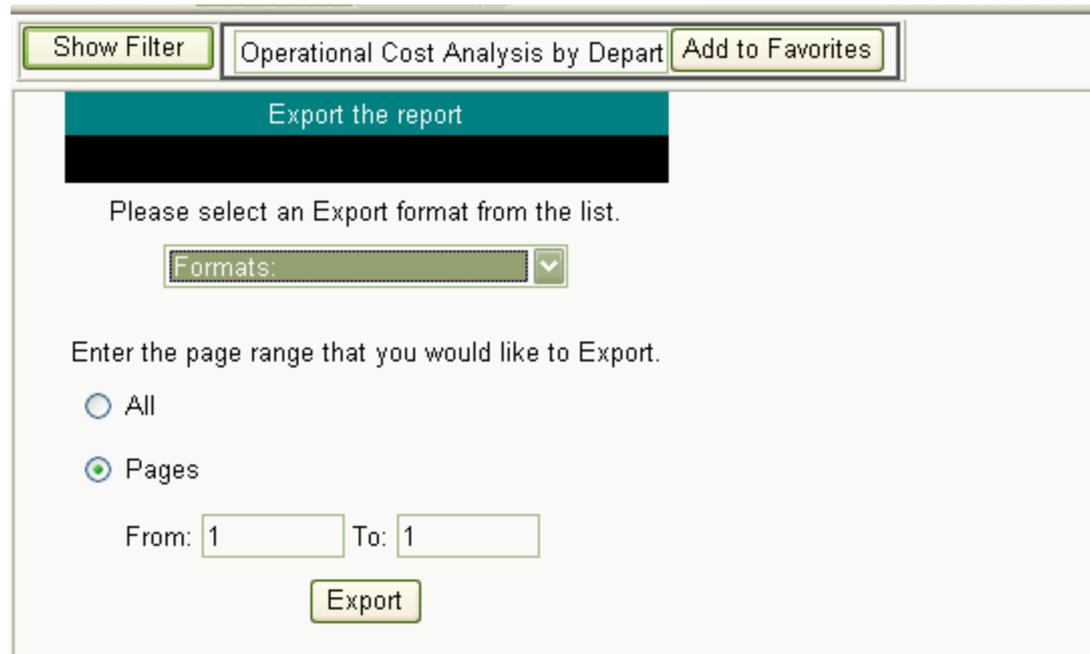
# Fleet Ohio Online Reports

## Menu Bar (Exporting)



Click 'Export' to export the report.

Choose the desired format and follow the prompts.



# Fleet Ohio Online Reports

## Menu Bar (Printing)



Click 'Print' and follow the instructions to print a report.

Operational Cost Analysis by Depart

Print the report

Enter the page range that you would like to Print.

All

Pages

From:  To:

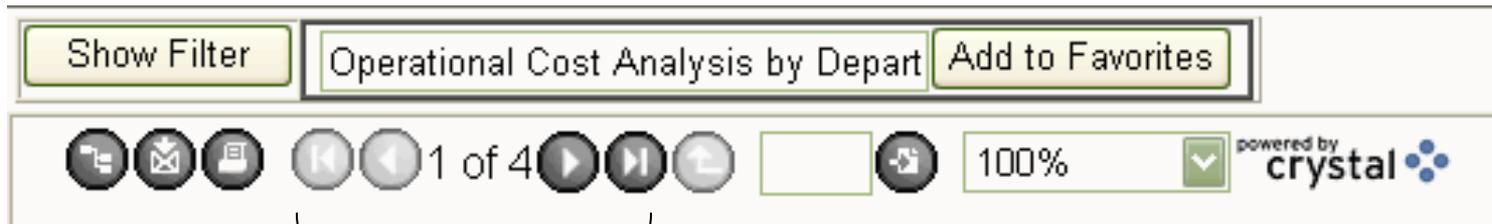
To Print:

1. In the next dialog that appears, select the "Open this file" option and click the OK button.
2. Click the printer icon on the Acrobat Reader Menu rather than the print button on your internet browser.

Print

# Fleet Ohio Online Reports

## Menu Bar (Navigating and Zooming)



These are navigation buttons used to review more than one page of a report

You can also change the 'Zoom'

# Fleet Ohio Online Reports

## Learning About Reports

To obtain information about a report click the 'About'

### Reporting

#### My Favorites

Reports:

**Cost Analysis**

Equipment Info

Fuel Info

Incident Info

⊕ Linear Info

Operations Info

Parts Info

Purchasing Info

⊕ Shop Operations

#### Cost Analysis

[Operational Cost Analysis by Department](#)

View

About

[Operational Cost Analysis by Equipment](#)

View

About

[Operational Cost Analysis by Maintenance Class](#)

View

About

[Operational Cost Summary by Department](#)

View

About

[Operational Cost Summary by Maintenance Class](#)

View

About

# Fleet Ohio Online Reports

## Learning About Reports (Continued)

The screenshot displays a web interface for reporting. On the left is a navigation menu under the heading 'Reporting'. The menu items are: 'My Favorites Reports:', 'Cost Analysis', 'Equipment Info', 'Fuel Info', 'Incident Info', 'Linear Info', 'Operations Info', 'Parts Info', 'Purchasing Info', and 'Shop Operations'. The 'Cost Analysis' item is highlighted. The main content area is titled 'Report Information' and contains the following fields:

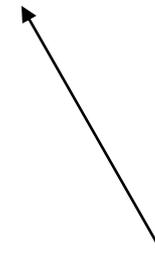
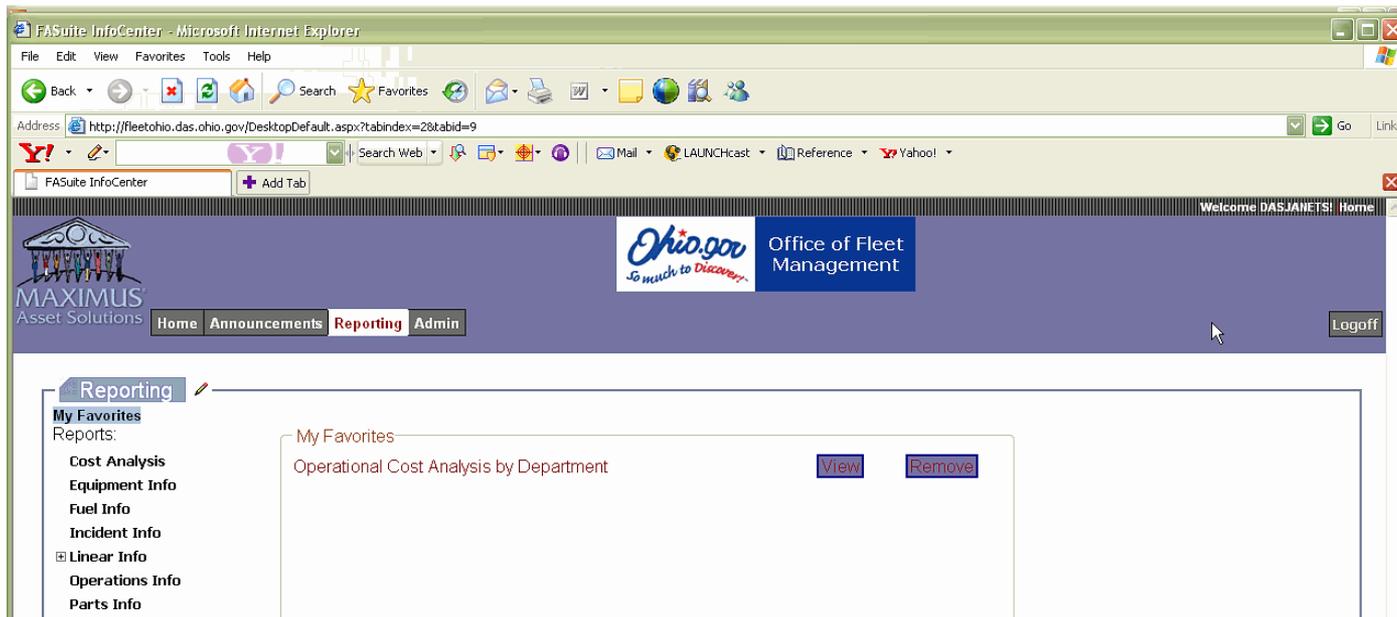
- Name:** Operational Cost Analysis by Department
- File:** Cost Analysis\FA-CostAnalysis-Dept.rpt
- Author:** MAXIMUS, Inc.
- Subject:** (empty field)
- Description:** Provides details of costs to operate equipment. Data for this report comes from the automatically-updated Historical Costs screen. Users are prompted for month/year and department ID range. Detail is grouped and subtotaled by assigned department ID, maintenance class, and meter 1 type. For each equipment unit displayed, several cost-related data elements are shown for report month, calendar YTD to that report month, and life to date to that report month.

At the bottom of the report information box are two buttons: 'View' and 'Back'.

To run the report click 'View'

Click the 'Back' button to return to the report list

# Logging Off



To exit, close the web browser.