AgileAssets Fleet Management System

- Training

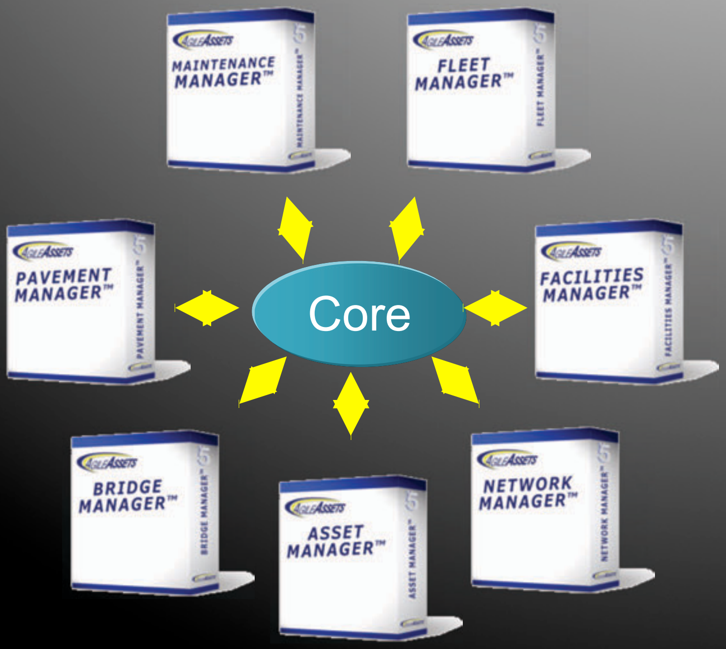
Himanshu Waikar, AgileAssets Inc.
Johnny Urias, RFD & Associates
Pascal Laumet, PhD, AgileAssets Inc.

Training Components

- Introduction
- Overview AgileAssets Fleet System
- Chain of Events
- Training Organization
- Hands-on Training

AgileAssets®
Asset Management Suite

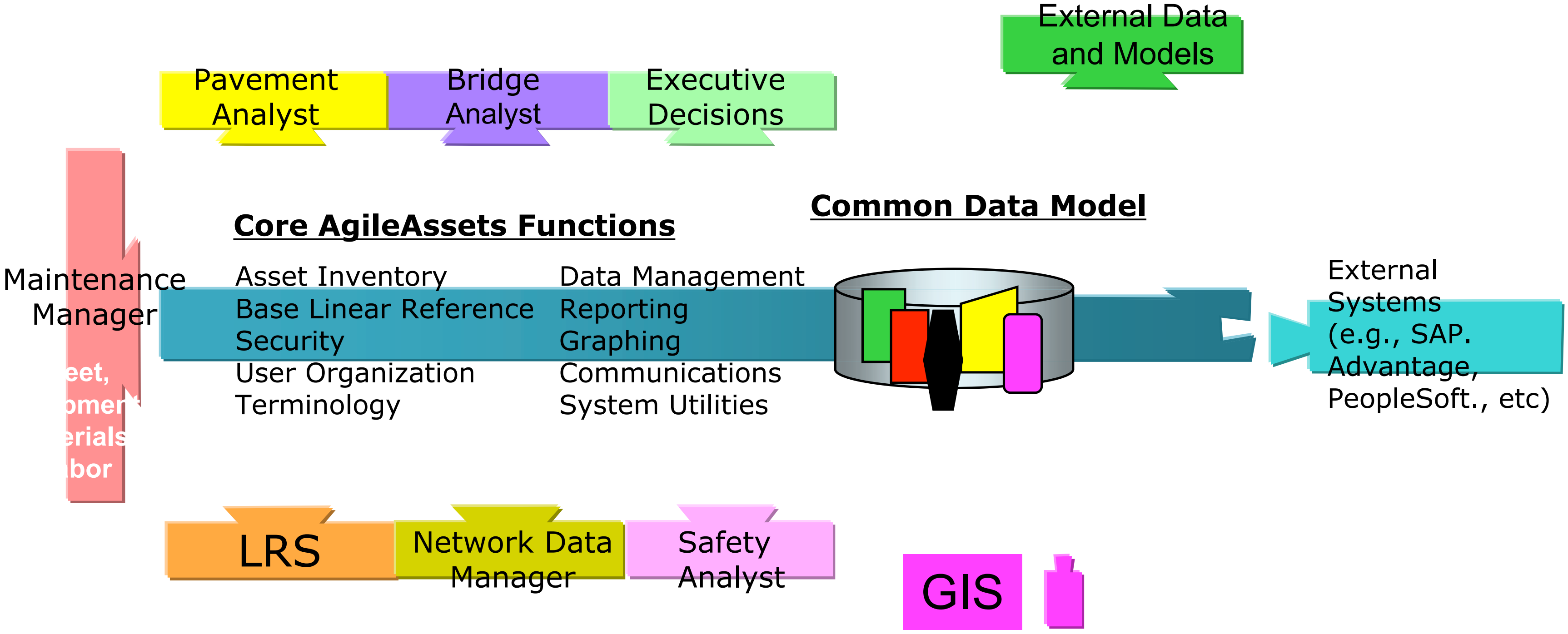
- Comprehensive Transportation Asset Management
- Centered around a core functionality set
- Asset Manager Modules:
  - *Agile**Assets***® Foundation
  - *Agile**Assets***® Asset Data Manager
  - *Agile**Assets***® Network Manager
  - *Agile**Assets***® Maintenance Manager
  - *Agile**Assets***® Fleet Manager
  - *Agile**Assets***® CIP Manager
  - ***AgileAssets***® Pavement Analyst
  - ***AgileAssets***® Bridge Analyst
  - *Agile**Assets***® Safety Manager
  - *Agile**Assets***® Mobile


MAINTENANCE MANAGER™
FLEET MANAGER™
PAVEMENT MANAGER™
Core
FACILITIES MANAGER™
BRIDGE MANAGER™
ASSET MANAGER™
NETWORK MANAGER™

AgileAssets®
Asset Management Suite

Product Overview

Modular Framework



External Data and Models

Pavement Analyst

Bridge Analyst

Executive Decisions

Maintenance Manager

eet,
omen
erials
bor

Core AgileAssets Functions

- Asset Inventory
- Base Linear Reference
- Security
- User Organization
- Terminology
- Data Management
- Reporting
- Graphing
- Communications
- System Utilities

Common Data Model

External Systems (e.g., SAP. Advantage, PeopleSoft., etc)

LRS

Network Data Manager

Safety Analyst

GIS

AgileAssets® Suite Key Features

- Zero-Footprint, Web-based System
- All Transportation Assets
- Agency-specific models
- Integrated Asset & Maintenance Management
- Integrated GIS Mapping Capabilities
- Secure and scalable to thousands of users
- Easy-to-use with Sophisticated Analysis
- Powerful reporting tools

ASSET MANAGER™
NETWORK MANAGER™
MAINTENANCE MANAGER™
FLEET MANAGER™
FACILITIES MANAGER™
PAVEMENT MANAGER™
BRIDGE MANAGER™

AgileAssets®
Asset Management Suite

End User →

Presentation Tier

- Ajax enabled Web Browser
- Zero Footprint, Platform Independent

Logic Tier

- J2EE Java Application Server
- Flexible, Scalable
- Platform Independent

Database Tier

- Oracle 10g or greater
- Proven Performance
- Industry Leader

Fleet Management System

Goals:

- Centralize all State Fleet Data
- Facilitate Data Access and Dissemination
- Facilitate Acquisition, Maintenance, and Monitoring
- Easy and Efficient Reporting

Bottom Line: *“Fleet Managed Efficiently”*

Fleet Management - Topics

- User Management
- Equipment Inventory Management
- Preventive Maintenance Management
- Repair Order Management
- Usage and Fuel Tracking
- Resource Management
  - Material
  - Labor
- Batching
- Reports

FMS - Modular Approach

System Module

Resources Module

Fleet Management Module

FMS – System Module

System Module

- CPA
  - Security Profile Definitions
  - User Management
  - Administrative Units (Agencies – locations)
  - System Configuration (tables, columns, menus, labels, window titles)
  - System Jobs

- Agencies
  - Agency User Management
  - Batching

FMS – Resources Module

Resources Module

- CPA
  - Labor Class Codes
  - Material Class Codes

- Agencies
  - Labor Inventory Management
  - Material Inventory Management (Acquisition, transfer, corrections, reconciliations)

FMS – Fleet Management Module

Fleet Management Module

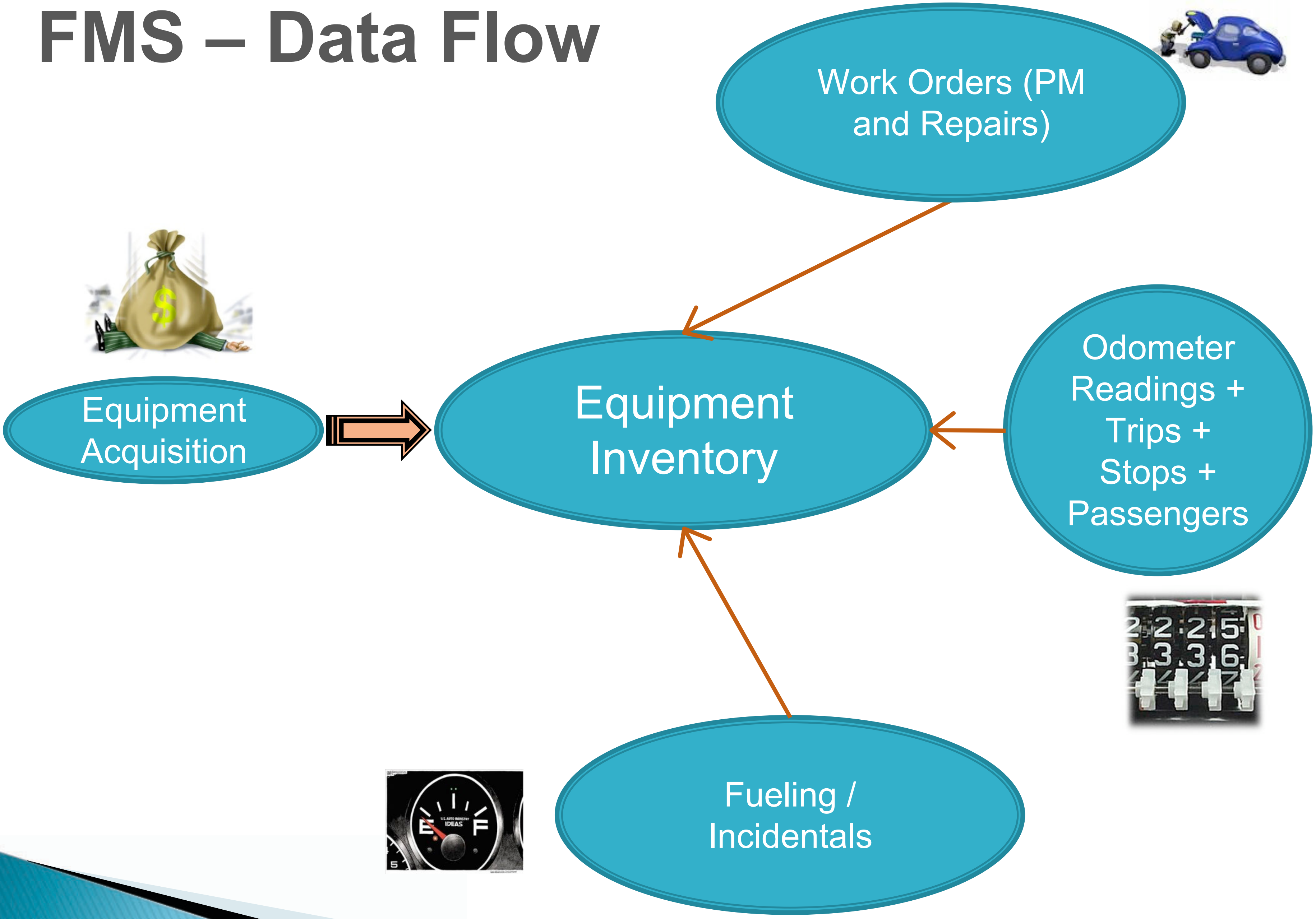
- CPA
  - Equipment Class Codes
  - PM by Class Code
  - All lists for dropdowns
  - Equipment Inventory (waivers)
  - Equipment Inquiry
  - Monitoring
  - Reports

FMS – Fleet Management Module

Fleet Management Module

- Agencies
  - Equipment Acquisition
  - Inventory Management
  - PM by Equipment
  - Repair Orders
  - Usage Tracking (odometer reading)
  - Fuel/Incidentals
  - Accidents
  - Equipment Inquiry
  - Motorpool
  - Reports

FMS – Data Flow



Work Orders (PM and Repairs)

Equipment Acquisition

Equipment Inventory

Odometer Readings + Trips + Stops + Passengers

Fueling / Incidentals

Equipment Inventory Management

- Equipment Inventory
  - Attribute data
    - Id Number, Class, Status, Location, Department, Plate, Make, Model, Year, Meter, Vin, Cost, Purchase Date, etc
  - Warranties
    - Manufacturer warranties, Parts warranties
  - Repair History
    - Repair transactions
  - Fueling transactions
  - Accidents

Equipment Inventory Window

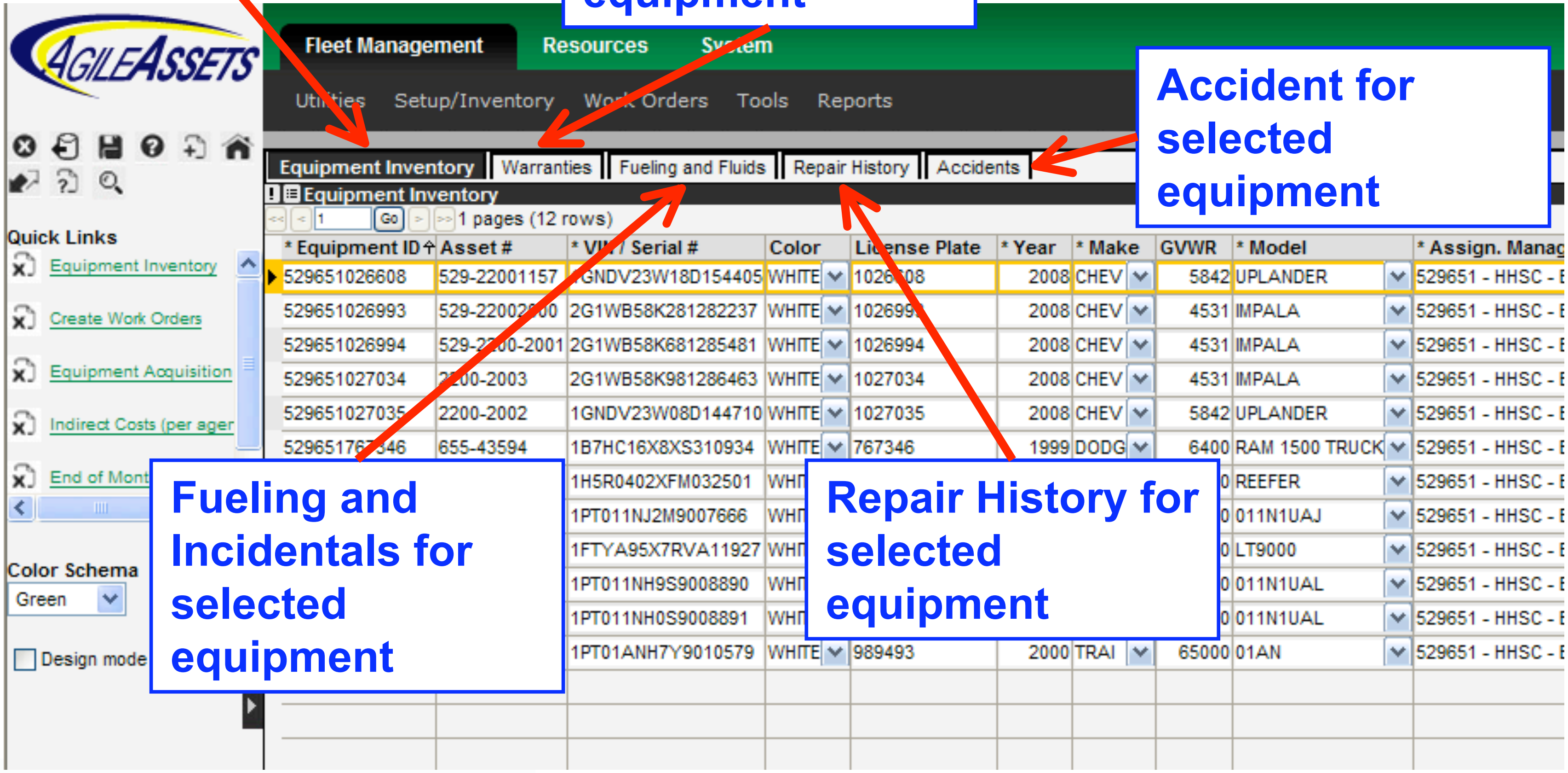
Equipment Inventory (list)

Warranties for selected equipment

Accident for selected equipment

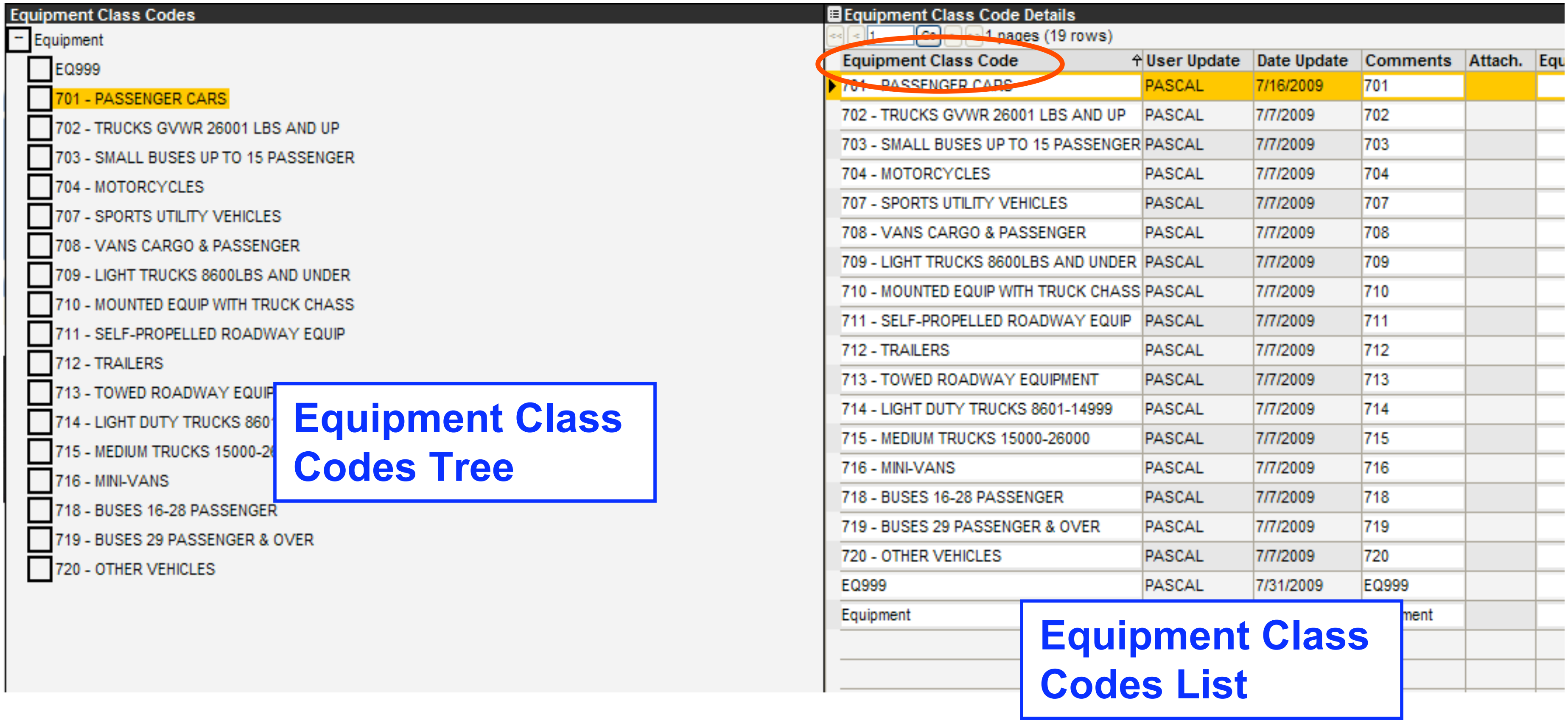
Fueling and Incidentals for selected equipment

Repair History for selected equipment


AGILEASSETS
Fleet Management
Resources
System
Utilities
Setup/Inventory
Work Orders
Tools
Reports
Quick Links
Equipment Inventory
Create Work Orders
Equipment Acquisition
Indirect Costs (per ager
End of Mont
Color Schema
Green
☐ Design mode
Equipment Inventory
Warranties
Fueling and Fluids
Repair History
Accidents
Equipment Inventory
Go
1 pages (12 rows)

* Equipment ID	Asset #	* VIN / Serial #	Color	License Plate	* Year	* Make	GVWR	* Model	* Assign. Manag
529651026608	529-22001157	[illegible]GNDV23W18D154405	WHITE	1026[illegible]08	2008	CHEV	5842	UPLANDER	529651 - HHSC -
529651026993	529-22002[illegible]0	2G1WB58K281282237	WHITE	102699[illegible]	2008	CHEV	4531	IMPALA	529651 - HHSC -
529651026994	529-2[illegible]00-2001	2G1WB58K681285481	WHITE	1026994	2008	CHEV	4531	IMPALA	529651 - HHSC -
529651027034	[illegible]00-2003	2G1WB58K981286463	WHITE	1027034	2008	CHEV	4531	IMPALA	529651 - HHSC -
529651027035	2200-2002	1GNDV23W08D144710	WHITE	1027035	2008	CHEV	5842	UPLANDER	529651 - HHSC -
5296517[illegible]346	655-43594	1B7HC16X8XS310934	WHITE	767346	1999	DODG	6400	RAM 1500 TRUCK	529651 - HHSC -
		1H5R0402XFM032501	WHI				0	REEFER	529651 - HHSC -
		1PT011NJ2M9007666	WHI				0	011N1UAJ	529651 - HHSC -
		1FTYA95X7RVA11927	WHI				0	LT9000	529651 - HHSC -
		1PT011NH9S9008890	WHI				0	011N1UAL	529651 - HHSC -
		1PT011NH0S9008891	WHI				0	011N1UAL	529651 - HHSC -
		1PT01ANH7Y9010579	WHITE	989493	2000	TRAI	65000	01AN	529651 - HHSC -

Equipment Class Codes



Equipment Class Codes

Equipment
☐ EQ999
☐ 701 - PASSENGER CARS
☐ 702 - TRUCKS GVWR 26001 LBS AND UP
☐ 703 - SMALL BUSES UP TO 15 PASSENGER
☐ 704 - MOTORCYCLES
☐ 707 - SPORTS UTILITY VEHICLES
☐ 708 - VANS CARGO & PASSENGER
☐ 709 - LIGHT TRUCKS 8600LBS AND UNDER
☐ 710 - MOUNTED EQUIP WITH TRUCK CHASS
☐ 711 - SELF-PROPELLED ROADWAY EQUIP
☐ 712 - TRAILERS
☐ 713 - TOWED ROADWAY EQUIP
☐ 714 - LIGHT DUTY TRUCKS 860
☐ 715 - MEDIUM TRUCKS 15000-2
☐ 716 - MINI-VANS
☐ 718 - BUSES 16-28 PASSENGER
☐ 719 - BUSES 29 PASSENGER & OVER
☐ 720 - OTHER VEHICLES

Equipment Class Codes Tree

Equipment Class Code Details

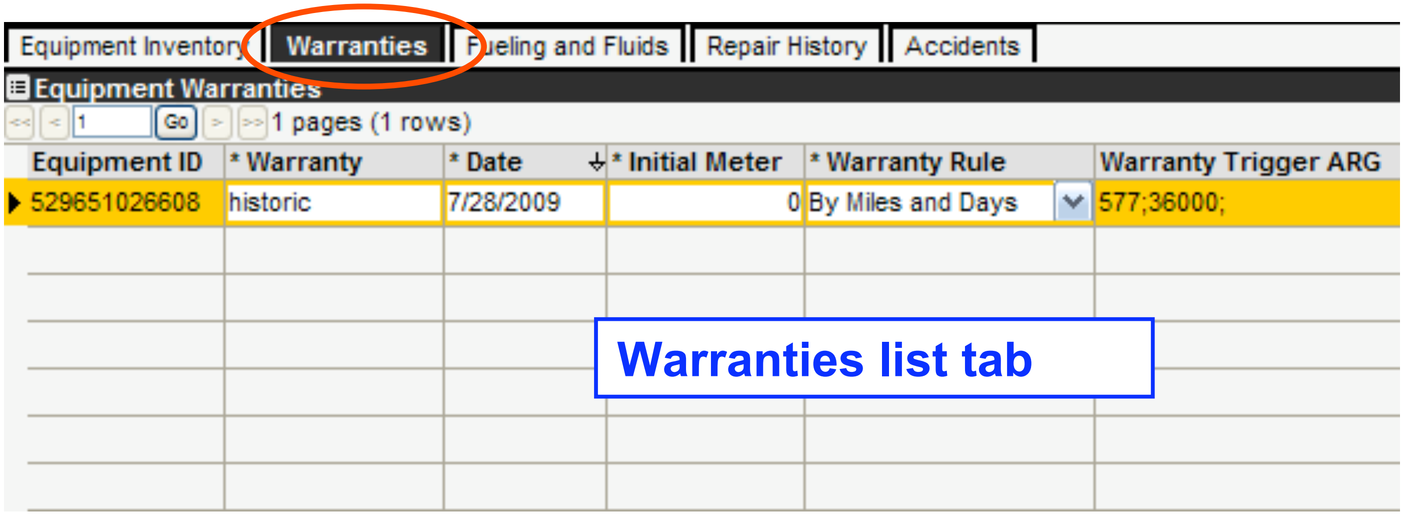
1 pages (19 rows)

Equipment Class Code	User Update	Date Update	Comments	Attach.	Equ
701 - PASSENGER CARS	PASCAL	7/16/2009	701		
702 - TRUCKS GVWR 26001 LBS AND UP	PASCAL	7/7/2009	702		
703 - SMALL BUSES UP TO 15 PASSENGER	PASCAL	7/7/2009	703		
704 - MOTORCYCLES	PASCAL	7/7/2009	704		
707 - SPORTS UTILITY VEHICLES	PASCAL	7/7/2009	707		
708 - VANS CARGO & PASSENGER	PASCAL	7/7/2009	708		
709 - LIGHT TRUCKS 8600LBS AND UNDER	PASCAL	7/7/2009	709		
710 - MOUNTED EQUIP WITH TRUCK CHASS	PASCAL	7/7/2009	710		
711 - SELF-PROPELLED ROADWAY EQUIP	PASCAL	7/7/2009	711		
712 - TRAILERS	PASCAL	7/7/2009	712		
713 - TOWED ROADWAY EQUIPMENT	PASCAL	7/7/2009	713		
714 - LIGHT DUTY TRUCKS 8601-14999	PASCAL	7/7/2009	714		
715 - MEDIUM TRUCKS 15000-26000	PASCAL	7/7/2009	715		
716 - MINI-VANS	PASCAL	7/7/2009	716		
718 - BUSES 16-28 PASSENGER	PASCAL	7/7/2009	718		
719 - BUSES 29 PASSENGER & OVER	PASCAL	7/7/2009	719		
720 - OTHER VEHICLES	PASCAL	7/7/2009	720		
EQ999	PASCAL	7/31/2009	EQ999		
Equipment			ment		

Equipment Class Codes List

Equipment Inventory – Warranties

- Warranty Setup Triggers
  - By Mileage
  - By Days
  - By Mileage and Days


Equipment Inventory
Warranties
Fueling and Fluids
Repair History
Accidents
Go
1 pages (1 rows)

Equipment Warranties

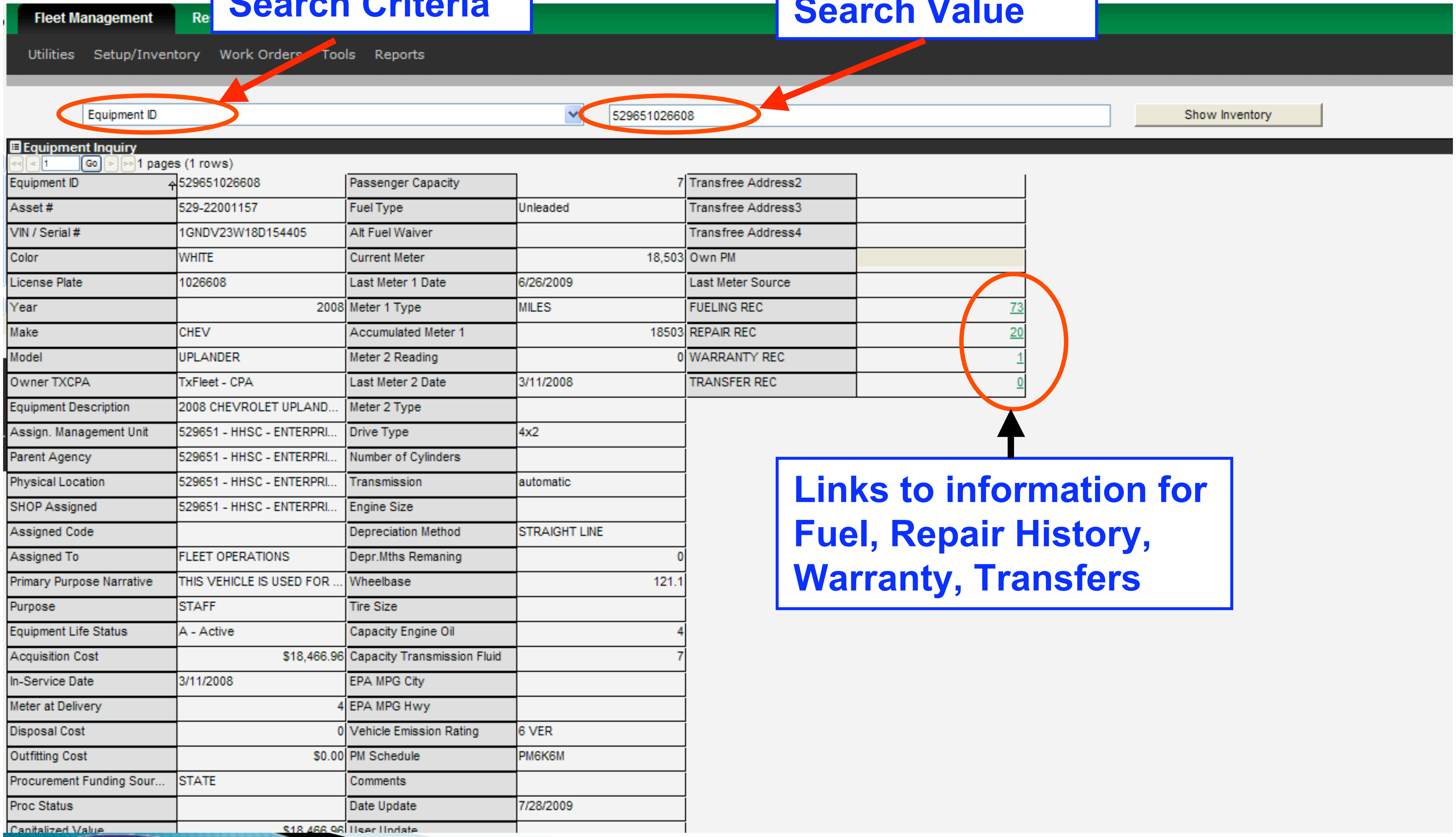
Equipment ID	* Warranty	* Date	* Initial Meter	* Warranty Rule	Warranty Trigger ARG
529651026608	historic	7/28/2009	0	By Miles and Days	577;36000;

Warranties list tab

Equipment Inquiry

Search Criteria

Search Value



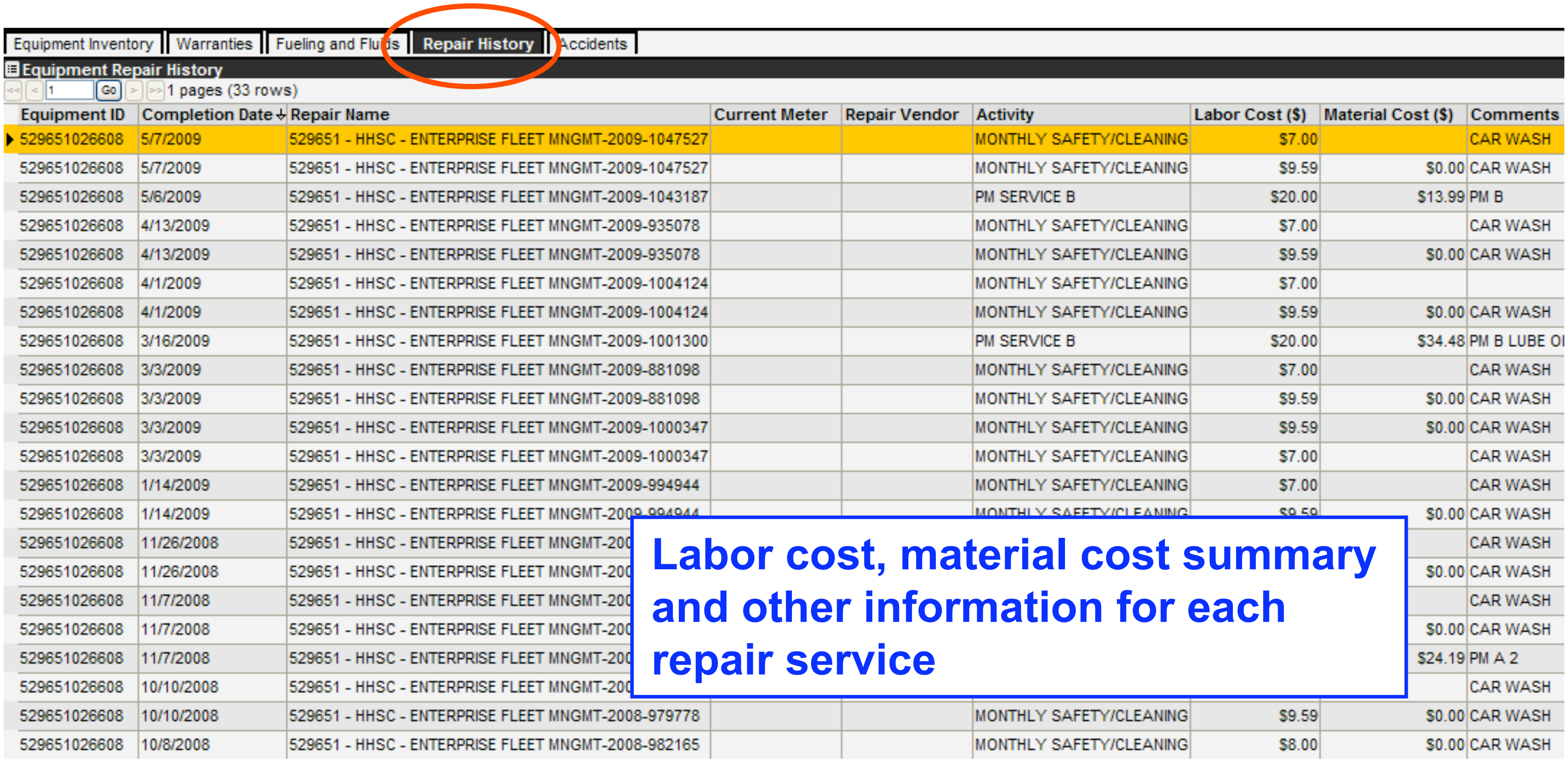
Equipment ID: 529651026608

Equipment Inquiry

Equipment ID	529651026608	Passenger Capacity	7	Transfree Address2	
Asset #	529-22001157	Fuel Type	Unleaded	Transfree Address3	
VIN / Serial #	1GNDV23W18D154405	Alt Fuel Waiver		Transfree Address4	
Color	WHITE	Current Meter	18,503	Own PM	
License Plate	1026608	Last Meter 1 Date	6/26/2009	Last Meter Source	
Year	2008	Meter 1 Type	MILES	FUELING REC	73
Make	CHEV	Accumulated Meter 1	18503	REPAIR REC	20
Model	UPLANDER	Meter 2 Reading	0	WARRANTY REC	1
Owner TXCPA	TxFleet - CPA	Last Meter 2 Date	3/11/2008	TRANSFER REC	0
Equipment Description	2008 CHEVROLET UPLAND...	Meter 2 Type			
Assign. Management Unit	529651 - HHSC - ENTERPRI...	Drive Type	4x2		
Parent Agency	529651 - HHSC - ENTERPRI...	Number of Cylinders			
Physical Location	529651 - HHSC - ENTERPRI...	Transmission	automatic		
SHOP Assigned	529651 - HHSC - ENTERPRI...	Engine Size			
Assigned Code		Depreciation Method	STRAIGHT LINE		
Assigned To	FLEET OPERATIONS	Depr.Mths Remaning	0		
Primary Purpose Narrative	THIS VEHICLE IS USED FOR ...	Wheelbase	121.1		
Purpose	STAFF	Tire Size			
Equipment Life Status	A - Active	Capacity Engine Oil	4		
Acquisition Cost	$18,466.96	Capacity Transmission Fluid	7		
In-Service Date	3/11/2008	EPA MPG City			
Meter at Delivery	4	EPA MPG Hwy			
Disposal Cost	0	Vehicle Emission Rating	6 VER		
Outfitting Cost	$0.00	PM Schedule	PM6K6M		
Procurement Funding Sour...	STATE	Comments			
Proc Status		Date Update	7/28/2009		
Capitalized Value	$18,466.96	User Update			

Links to information for Fuel, Repair History, Warranty, Transfers

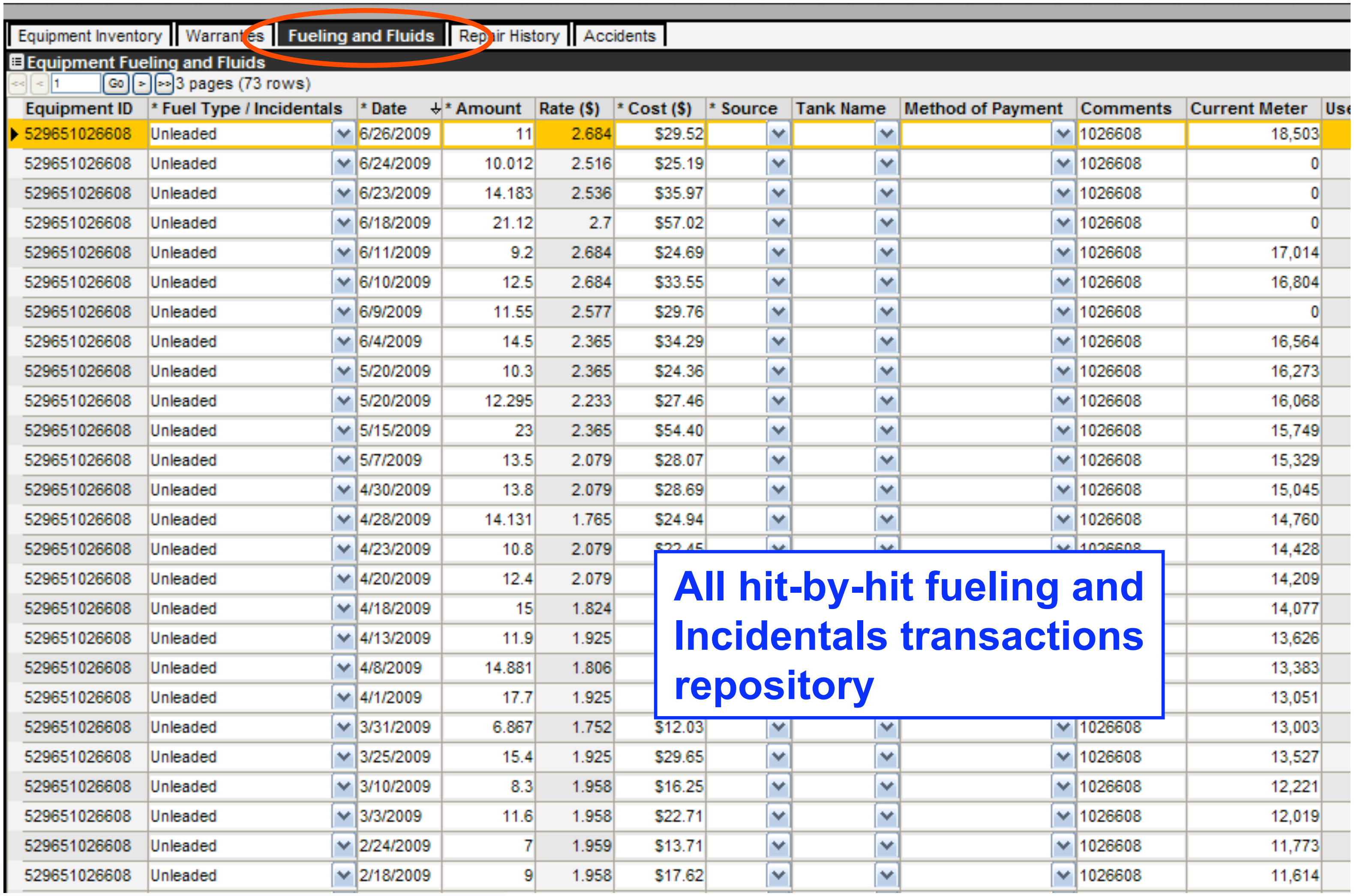
Equipment Repair History



Equipment ID	Completion Date	Repair Name	Current Meter	Repair Vendor	Activity	Labor Cost ($)	Material Cost ($)	Comments
529651026608	5/7/2009	529651 - HHSC - ENTERPRISE FLEET MNGMT-2009-1047527			MONTHLY SAFETY/CLEANING	$7.00		CAR WASH
529651026608	5/7/2009	529651 - HHSC - ENTERPRISE FLEET MNGMT-2009-1047527			MONTHLY SAFETY/CLEANING	$9.59	$0.00	CAR WASH
529651026608	5/6/2009	529651 - HHSC - ENTERPRISE FLEET MNGMT-2009-1043187			PM SERVICE B	$20.00	$13.99	PM B
529651026608	4/13/2009	529651 - HHSC - ENTERPRISE FLEET MNGMT-2009-935078			MONTHLY SAFETY/CLEANING	$7.00		CAR WASH
529651026608	4/13/2009	529651 - HHSC - ENTERPRISE FLEET MNGMT-2009-935078			MONTHLY SAFETY/CLEANING	$9.59	$0.00	CAR WASH
529651026608	4/1/2009	529651 - HHSC - ENTERPRISE FLEET MNGMT-2009-1004124			MONTHLY SAFETY/CLEANING	$7.00		
529651026608	4/1/2009	529651 - HHSC - ENTERPRISE FLEET MNGMT-2009-1004124			MONTHLY SAFETY/CLEANING	$9.59	$0.00	CAR WASH
529651026608	3/16/2009	529651 - HHSC - ENTERPRISE FLEET MNGMT-2009-1001300			PM SERVICE B	$20.00	$34.48	PM B LUBE OI
529651026608	3/3/2009	529651 - HHSC - ENTERPRISE FLEET MNGMT-2009-881098			MONTHLY SAFETY/CLEANING	$7.00		CAR WASH
529651026608	3/3/2009	529651 - HHSC - ENTERPRISE FLEET MNGMT-2009-881098			MONTHLY SAFETY/CLEANING	$9.59	$0.00	CAR WASH
529651026608	3/3/2009	529651 - HHSC - ENTERPRISE FLEET MNGMT-2009-1000347			MONTHLY SAFETY/CLEANING	$9.59	$0.00	CAR WASH
529651026608	3/3/2009	529651 - HHSC - ENTERPRISE FLEET MNGMT-2009-1000347			MONTHLY SAFETY/CLEANING	$7.00		CAR WASH
529651026608	1/14/2009	529651 - HHSC - ENTERPRISE FLEET MNGMT-2009-994944			MONTHLY SAFETY/CLEANING	$7.00		CAR WASH
529651026608	1/14/2009	529651 - HHSC - ENTERPRISE FLEET MNGMT-2009-994944			MONTHLY SAFETY/CLEANING	$9.59	$0.00	CAR WASH
529651026608	11/26/2008	529651 - HHSC - ENTERPRISE FLEET MNGMT-200						CAR WASH
529651026608	11/26/2008	529651 - HHSC - ENTERPRISE FLEET MNGMT-200					$0.00	CAR WASH
529651026608	11/7/2008	529651 - HHSC - ENTERPRISE FLEET MNGMT-200						CAR WASH
529651026608	11/7/2008	529651 - HHSC - ENTERPRISE FLEET MNGMT-200					$0.00	CAR WASH
529651026608	11/7/2008	529651 - HHSC - ENTERPRISE FLEET MNGMT-200					$24.19	PM A 2
529651026608	10/10/2008	529651 - HHSC - ENTERPRISE FLEET MNGMT-200						CAR WASH
529651026608	10/10/2008	529651 - HHSC - ENTERPRISE FLEET MNGMT-2008-979778			MONTHLY SAFETY/CLEANING	$9.59	$0.00	CAR WASH
529651026608	10/8/2008	529651 - HHSC - ENTERPRISE FLEET MNGMT-2008-982165			MONTHLY SAFETY/CLEANING	$8.00	$0.00	CAR WASH

Labor cost, material cost summary and other information for each repair service

Fueling and Incidental Transactions

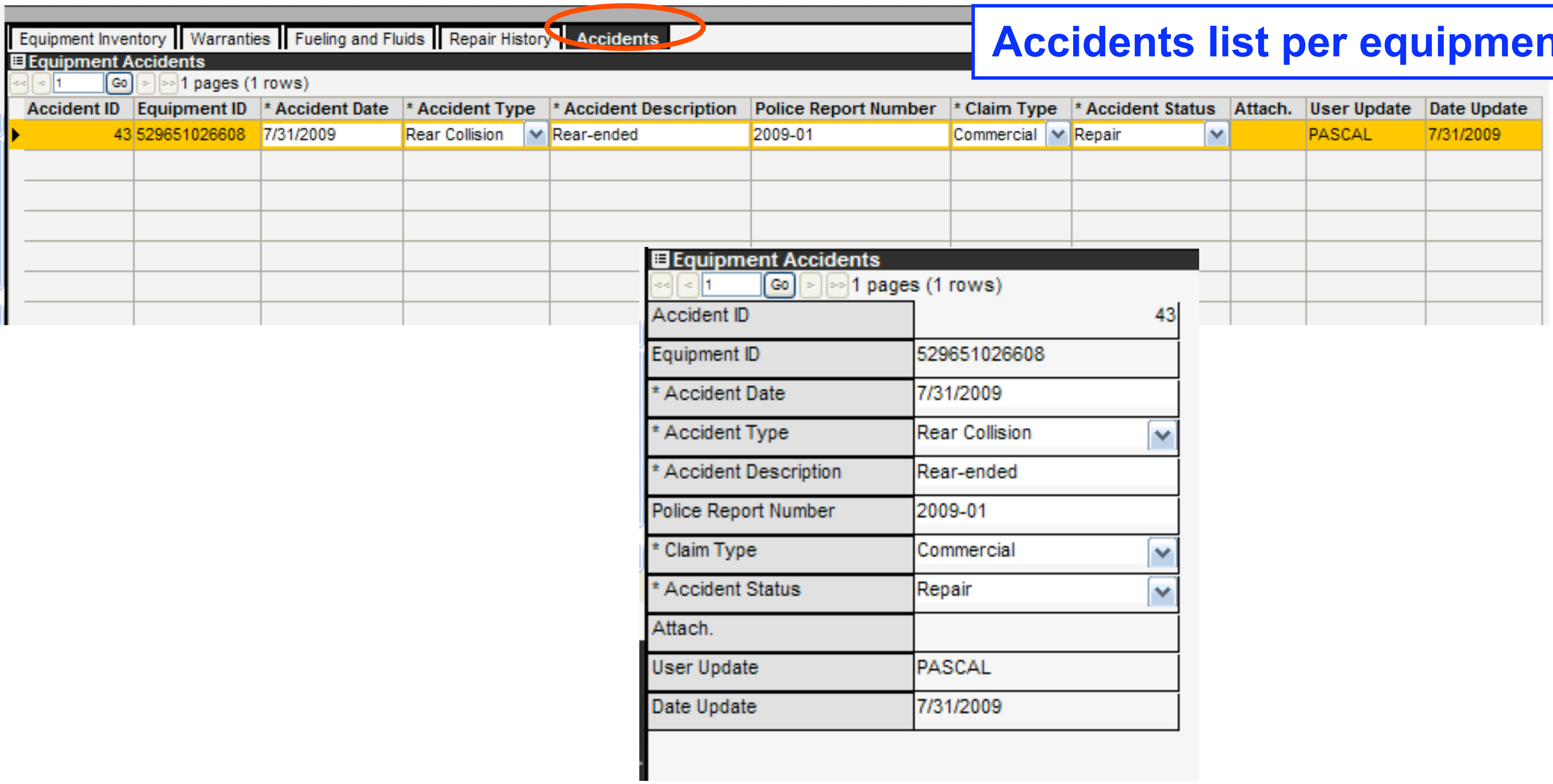


Equipment ID	* Fuel Type / Incidentals	* Date	* Amount	Rate ($)	* Cost ($)	* Source	Tank Name	Method of Payment	Comments	Current Meter	Use
529651026608	Unleaded	6/26/2009	11	2.684	$29.52				1026608	18,503	
529651026608	Unleaded	6/24/2009	10.012	2.516	$25.19				1026608	0	
529651026608	Unleaded	6/23/2009	14.183	2.536	$35.97				1026608	0	
529651026608	Unleaded	6/18/2009	21.12	2.7	$57.02				1026608	0	
529651026608	Unleaded	6/11/2009	9.2	2.684	$24.69				1026608	17,014	
529651026608	Unleaded	6/10/2009	12.5	2.684	$33.55				1026608	16,804	
529651026608	Unleaded	6/9/2009	11.55	2.577	$29.76				1026608	0	
529651026608	Unleaded	6/4/2009	14.5	2.365	$34.29				1026608	16,564	
529651026608	Unleaded	5/20/2009	10.3	2.365	$24.36				1026608	16,273	
529651026608	Unleaded	5/20/2009	12.295	2.233	$27.46				1026608	16,068	
529651026608	Unleaded	5/15/2009	23	2.365	$54.40				1026608	15,749	
529651026608	Unleaded	5/7/2009	13.5	2.079	$28.07				1026608	15,329	
529651026608	Unleaded	4/30/2009	13.8	2.079	$28.69				1026608	15,045	
529651026608	Unleaded	4/28/2009	14.131	1.765	$24.94				1026608	14,760	
529651026608	Unleaded	4/23/2009	10.8	2.079	$22.45				1026608	14,428	
529651026608	Unleaded	4/20/2009	12.4	2.079						14,209	
529651026608	Unleaded	4/18/2009	15	1.824						14,077	
529651026608	Unleaded	4/13/2009	11.9	1.925						13,626	
529651026608	Unleaded	4/8/2009	14.881	1.806						13,383	
529651026608	Unleaded	4/1/2009	17.7	1.925						13,051	
529651026608	Unleaded	3/31/2009	6.867	1.752	$12.03				1026608	13,003	
529651026608	Unleaded	3/25/2009	15.4	1.925	$29.65				1026608	13,527	
529651026608	Unleaded	3/10/2009	8.3	1.958	$16.25				1026608	12,221	
529651026608	Unleaded	3/3/2009	11.6	1.958	$22.71				1026608	12,019	
529651026608	Unleaded	2/24/2009	7	1.959	$13.71				1026608	11,773	
529651026608	Unleaded	2/18/2009	9	1.958	$17.62				1026608	11,614	

All hit-by-hit fueling and Incidentals transactions repository

Equipment Accidents

Accidents list per equipment

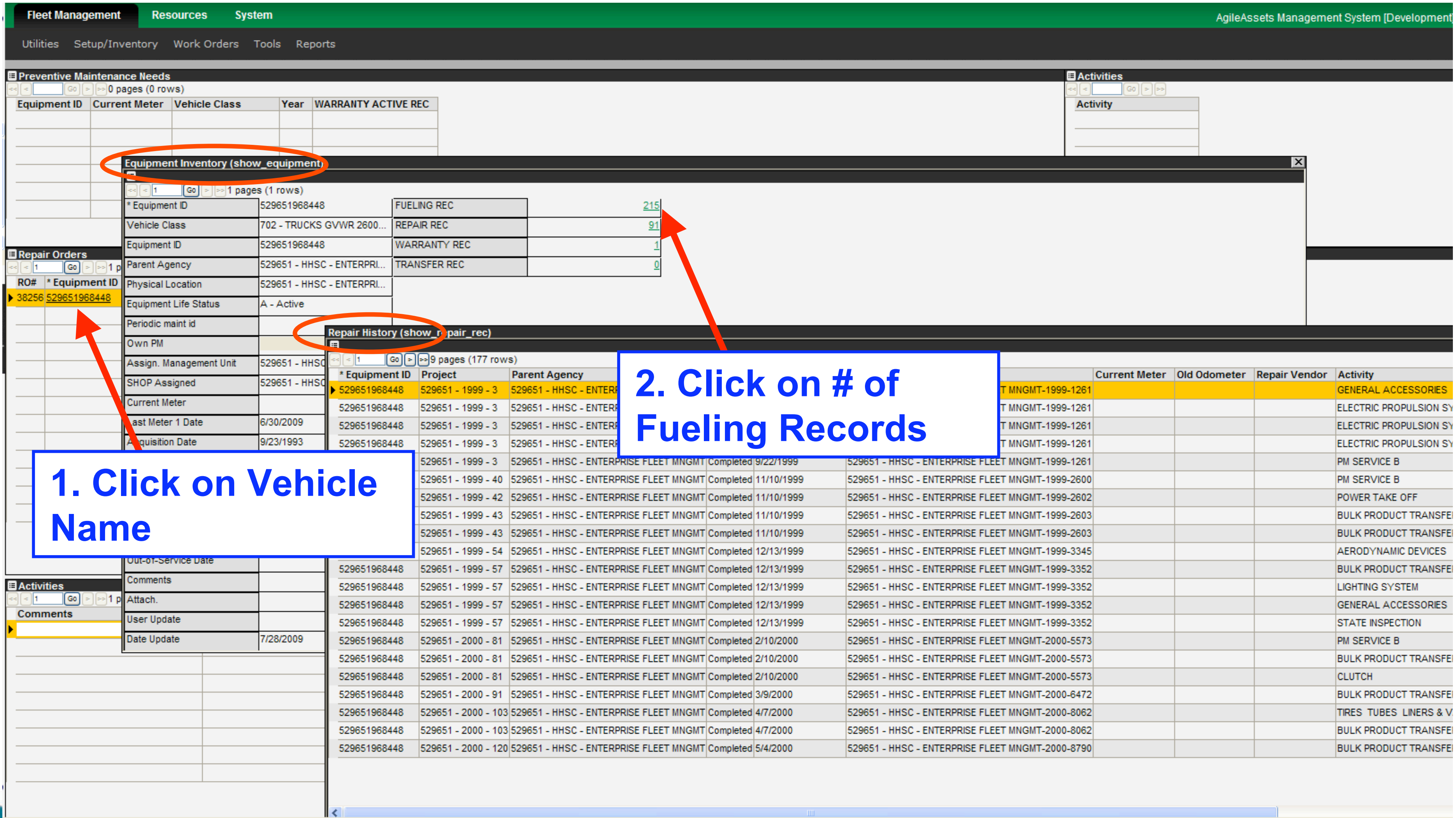

Equipment Inventory
Warranties
Fueling and Fluids
Repair History
Accidents
Equipment Accidents
Go
1 pages (1 rows)

Accident ID	Equipment ID	* Accident Date	* Accident Type	* Accident Description	Police Report Number	* Claim Type	* Accident Status	Attach.	User Update	Date Update
43	529651026608	7/31/2009	Rear Collision	Rear-ended	2009-01	Commercial	Repair		PASCAL	7/31/2009

Equipment Accidents
Go
1 pages (1 rows)

Accident ID	43
Equipment ID	529651026608
* Accident Date	7/31/2009
* Accident Type	Rear Collision
* Accident Description	Rear-ended
Police Report Number	2009-01
* Claim Type	Commercial
* Accident Status	Repair
Attach.	
User Update	PASCAL
Date Update	7/31/2009

Hot Link Based Data Navigation



Preventive Maintenance Needs

0 pages (0 rows)

Equipment ID	Current Meter	Vehicle Class	Year	WARRANTY ACTIVE REC

Activities

Activity

Equipment Inventory (show_equipment)

1 pages (1 rows)

* Equipment ID	529651968448	FUELING REC	215
Vehicle Class	702 - TRUCKS GVWR 2600...	REPAIR REC	91
Equipment ID	529651968448	WARRANTY REC	1
Parent Agency	529651 - HHSC - ENTERPRI...	TRANSFER REC	0
Physical Location	529651 - HHSC - ENTERPRI...		
Equipment Life Status	A - Active		
Periodic maint id			
Own PM			
Assign. Management Unit	529651 - HHSC		
SHOP Assigned	529651 - HHSC		
Current Meter			
ast Meter 1 Date	6/30/2009		
A quisition Date	9/23/1993		
Out-of-Service Date			
Comments			
Attach.			
User Update			
Date Update	7/28/2009		

Repair Orders

RO#	* Equipment ID
38256	529651968448

Activities

Comments

Repair History (show_repair_rec)

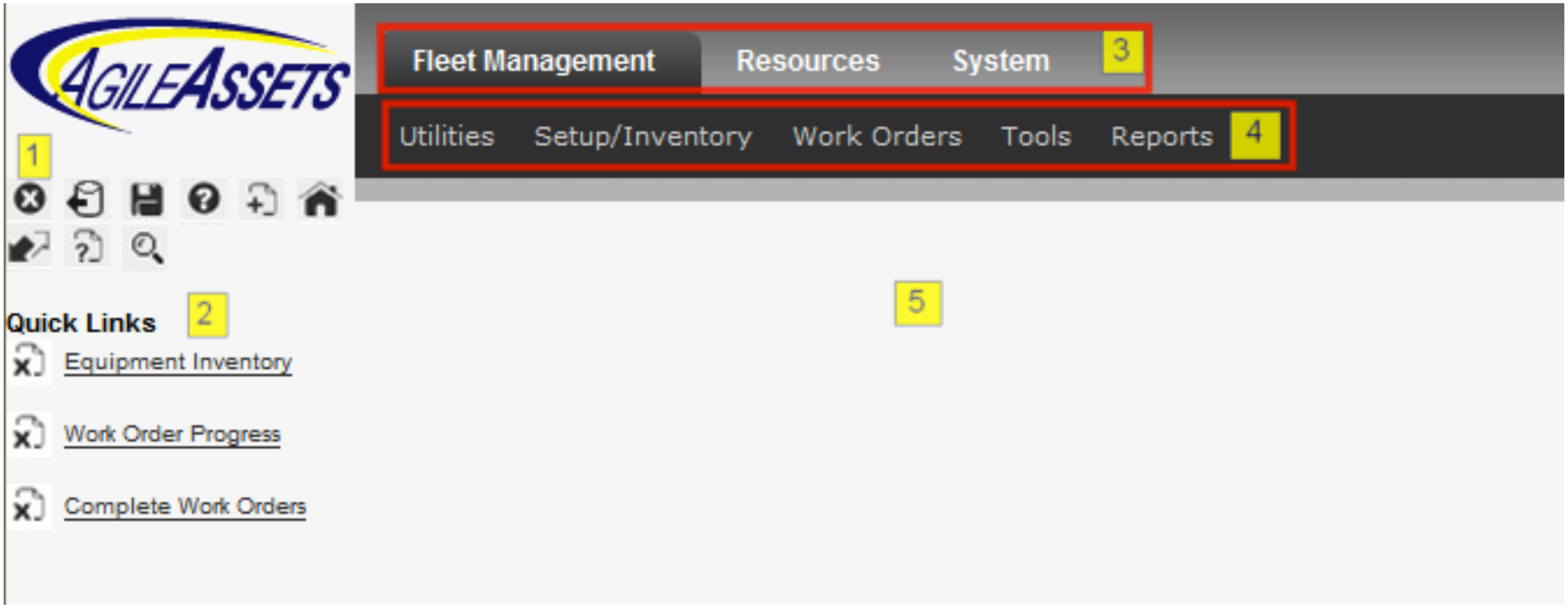
9 pages (177 rows)

* Equipment ID	Project	Parent Agency				Current Meter	Old Odometer	Repair Vendor	Activity
529651968448	529651 - 1999 - 3	529651 - HHSC - ENTERF			T MNGMT-1999-1261				GENERAL ACCESSORIES
529651968448	529651 - 1999 - 3	529651 - HHSC - ENTERF			T MNGMT-1999-1261				ELECTRIC PROPULSION SY
529651968448	529651 - 1999 - 3	529651 - HHSC - ENTERF			T MNGMT-1999-1261				ELECTRIC PROPULSION SY
529651968448	529651 - 1999 - 3	529651 - HHSC - ENTERF			T MNGMT-1999-1261				ELECTRIC PROPULSION SY
	529651 - 1999 - 3	529651 - HHSC - ENTERPRISE FLEET MNGMT	Completed	9/22/1999	529651 - HHSC - ENTERPRISE FLEET MNGMT-1999-1261				PM SERVICE B
	529651 - 1999 - 40	529651 - HHSC - ENTERPRISE FLEET MNGMT	Completed	11/10/1999	529651 - HHSC - ENTERPRISE FLEET MNGMT-1999-2600				PM SERVICE B
	529651 - 1999 - 42	529651 - HHSC - ENTERPRISE FLEET MNGMT	Completed	11/10/1999	529651 - HHSC - ENTERPRISE FLEET MNGMT-1999-2602				POWER TAKE OFF
	529651 - 1999 - 43	529651 - HHSC - ENTERPRISE FLEET MNGMT	Completed	11/10/1999	529651 - HHSC - ENTERPRISE FLEET MNGMT-1999-2603				BULK PRODUCT TRANSFE
	529651 - 1999 - 43	529651 - HHSC - ENTERPRISE FLEET MNGMT	Completed	11/10/1999	529651 - HHSC - ENTERPRISE FLEET MNGMT-1999-2603				BULK PRODUCT TRANSFE
	529651 - 1999 - 54	529651 - HHSC - ENTERPRISE FLEET MNGMT	Completed	12/13/1999	529651 - HHSC - ENTERPRISE FLEET MNGMT-1999-3345				AERODYNAMIC DEVICES
529651968448	529651 - 1999 - 57	529651 - HHSC - ENTERPRISE FLEET MNGMT	Completed	12/13/1999	529651 - HHSC - ENTERPRISE FLEET MNGMT-1999-3352				BULK PRODUCT TRANSFE
529651968448	529651 - 1999 - 57	529651 - HHSC - ENTERPRISE FLEET MNGMT	Completed	12/13/1999	529651 - HHSC - ENTERPRISE FLEET MNGMT-1999-3352				LIGHTING SYSTEM
529651968448	529651 - 1999 - 57	529651 - HHSC - ENTERPRISE FLEET MNGMT	Completed	12/13/1999	529651 - HHSC - ENTERPRISE FLEET MNGMT-1999-3352				GENERAL ACCESSORIES
529651968448	529651 - 1999 - 57	529651 - HHSC - ENTERPRISE FLEET MNGMT	Completed	12/13/1999	529651 - HHSC - ENTERPRISE FLEET MNGMT-1999-3352				STATE INSPECTION
529651968448	529651 - 2000 - 81	529651 - HHSC - ENTERPRISE FLEET MNGMT	Completed	2/10/2000	529651 - HHSC - ENTERPRISE FLEET MNGMT-2000-5573				PM SERVICE B
529651968448	529651 - 2000 - 81	529651 - HHSC - ENTERPRISE FLEET MNGMT	Completed	2/10/2000	529651 - HHSC - ENTERPRISE FLEET MNGMT-2000-5573				BULK PRODUCT TRANSFE
529651968448	529651 - 2000 - 81	529651 - HHSC - ENTERPRISE FLEET MNGMT	Completed	2/10/2000	529651 - HHSC - ENTERPRISE FLEET MNGMT-2000-5573				CLUTCH
529651968448	529651 - 2000 - 91	529651 - HHSC - ENTERPRISE FLEET MNGMT	Completed	3/9/2000	529651 - HHSC - ENTERPRISE FLEET MNGMT-2000-6472				BULK PRODUCT TRANSFE
529651968448	529651 - 2000 - 103	529651 - HHSC - ENTERPRISE FLEET MNGMT	Completed	4/7/2000	529651 - HHSC - ENTERPRISE FLEET MNGMT-2000-8062				TIRES TUBES LINERS & V
529651968448	529651 - 2000 - 103	529651 - HHSC - ENTERPRISE FLEET MNGMT	Completed	4/7/2000	529651 - HHSC - ENTERPRISE FLEET MNGMT-2000-8062				BULK PRODUCT TRANSFE
529651968448	529651 - 2000 - 120	529651 - HHSC - ENTERPRISE FLEET MNGMT	Completed	5/4/2000	529651 - HHSC - ENTERPRISE FLEET MNGMT-2000-8790				BULK PRODUCT TRANSFE

1. Click on Vehicle Name

2. Click on # of Fueling Records

FMS – Basic Navigation

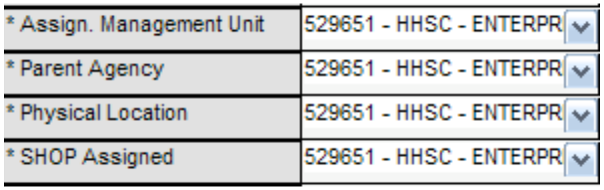

AGILEASSETS
1
Quick Links
2
Equipment Inventory
Work Order Progress
Complete Work Orders
Fleet Management
Resources
System
3
Utilities
Setup/Inventory
Work Orders
Tools
Reports
4
5

FMS - Ownership

All the data is “owned”:

- CPA: Owns all the data – can see everything

- Parent Agency: agency that owns the equipments
- Physical Location: agency where the equipment is physically located
- Assigned Management Unit: agency/location that is assigned this equipment
- Shop Assigned: agency/location that will handle repairs on this vehicle

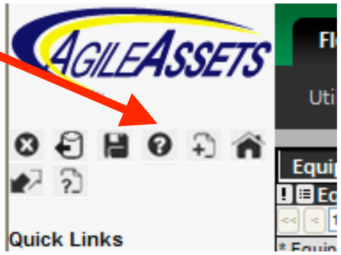


* Assign. Management Unit	529651 - HHSC - ENTERPR
* Parent Agency	529651 - HHSC - ENTERPR
* Physical Location	529651 - HHSC - ENTERPR
* SHOP Assigned	529651 - HHSC - ENTERPR

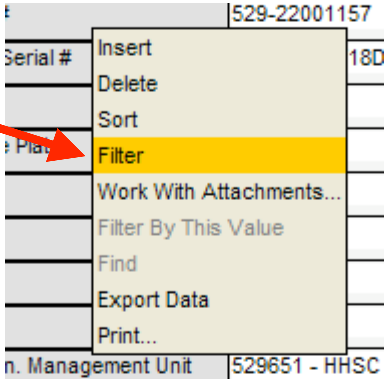
FMS – Tips

A few interesting capabilities:

- Context-based Help


AGILEASSETS
Uti
Equi
Quick Links

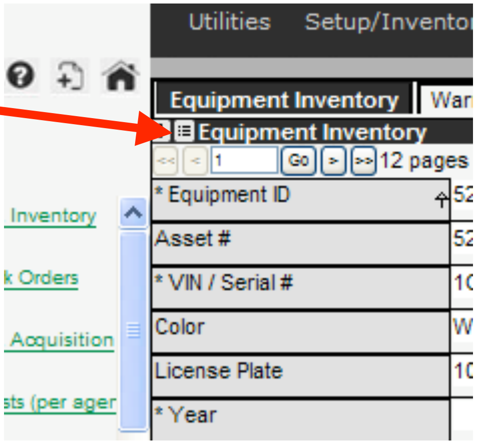
- Filter (in any data window)


529-22001157
Serial #
18D
Insert
Delete
Sort
Filter
Work With Attachments...
Filter By This Value
Find
Export Data
Print...
n. Management Unit
529651 - HHSC

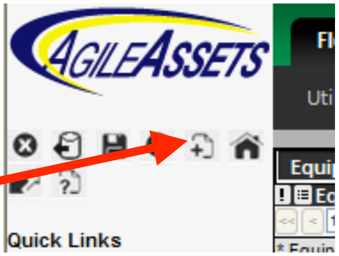
FMS – Tips

A few interesting capabilities:

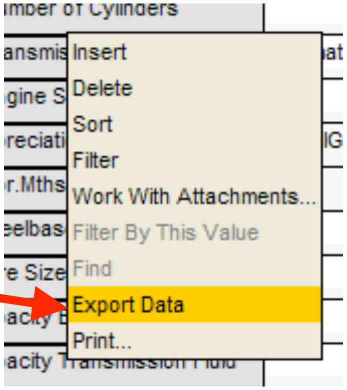
- Grid View / Form View


Utilities
Setup/Inventor
Equipment Inventory
War
Equipment Inventory
1
Go
12 pages
Inventory
k Orders
Acquisition
sts (per ager
* Equipment ID
52
Asset #
52
* VIN / Serial #
10
Color
W
License Plate
10
* Year

- Quick Links


AGILEASSETS
Fl
Uti
Equi
Ec
Quick Links

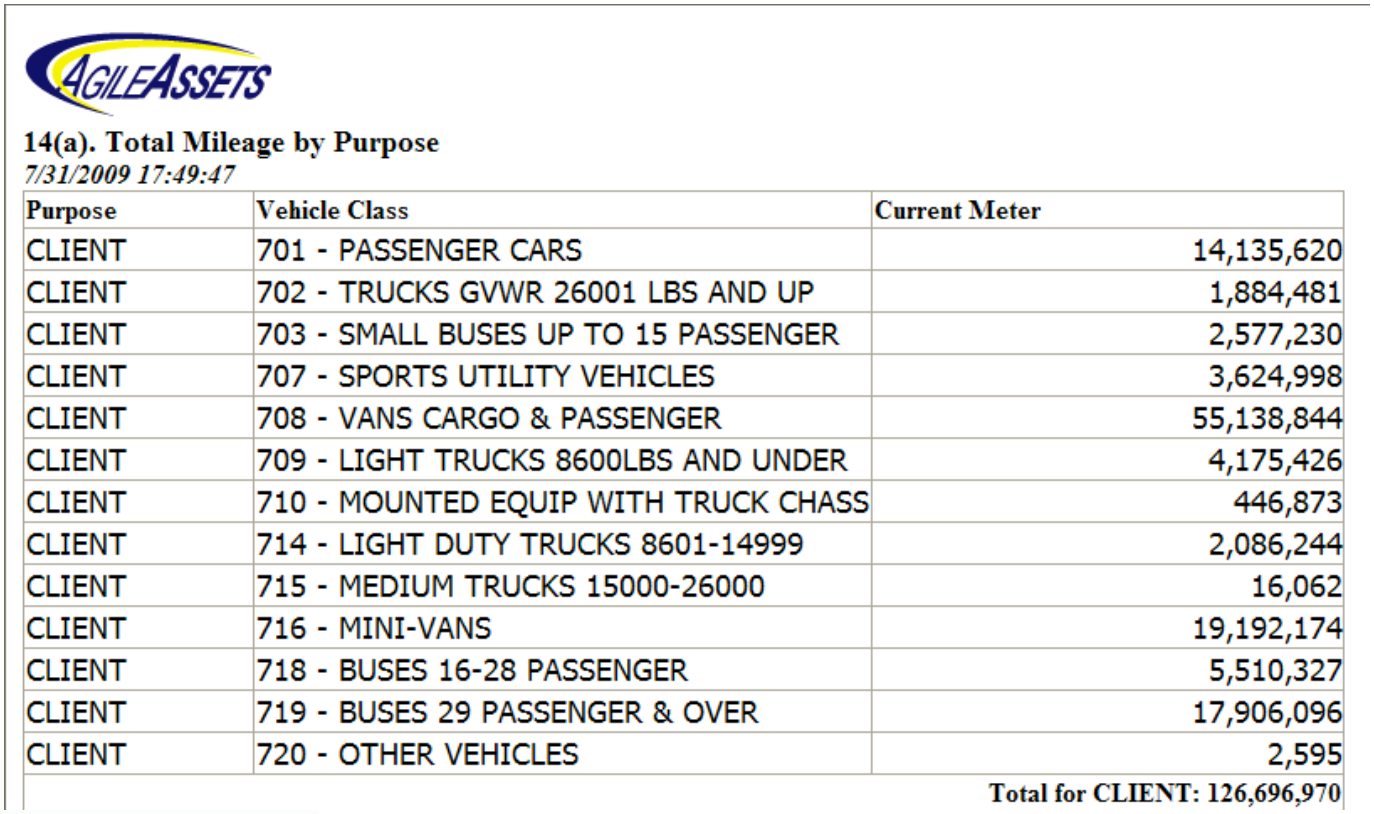
- Export


Insert
Delete
Sort
Filter
Work With Attachments...
Filter By This Value
Find
Export Data
Print...

Reports

Powerful ad-hoc reporting:

- Standard (tabular) Reports



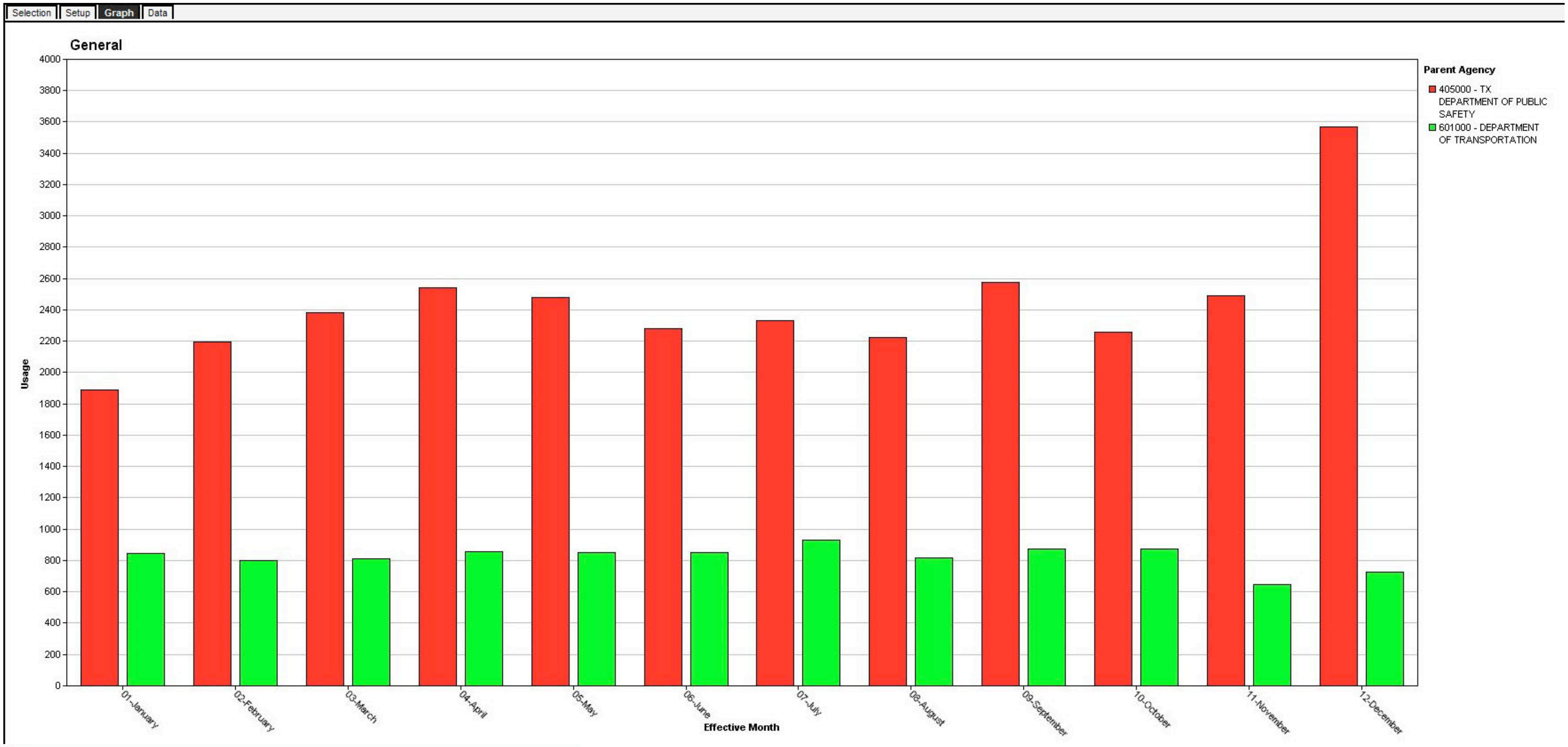
14(a). Total Mileage by Purpose

7/31/2009 17:49:47

Purpose	Vehicle Class	Current Meter
CLIENT	701 - PASSENGER CARS	14,135,620
CLIENT	702 - TRUCKS GVWR 26001 LBS AND UP	1,884,481
CLIENT	703 - SMALL BUSES UP TO 15 PASSENGER	2,577,230
CLIENT	707 - SPORTS UTILITY VEHICLES	3,624,998
CLIENT	708 - VANS CARGO & PASSENGER	55,138,844
CLIENT	709 - LIGHT TRUCKS 8600LBS AND UNDER	4,175,426
CLIENT	710 - MOUNTED EQUIP WITH TRUCK CHASS	446,873
CLIENT	714 - LIGHT DUTY TRUCKS 8601-14999	2,086,244
CLIENT	715 - MEDIUM TRUCKS 15000-26000	16,062
CLIENT	716 - MINI-VANS	19,192,174
CLIENT	718 - BUSES 16-28 PASSENGER	5,510,327
CLIENT	719 - BUSES 29 PASSENGER & OVER	17,906,096
CLIENT	720 - OTHER VEHICLES	2,595
		Total for CLIENT: 126,696,970

Reports

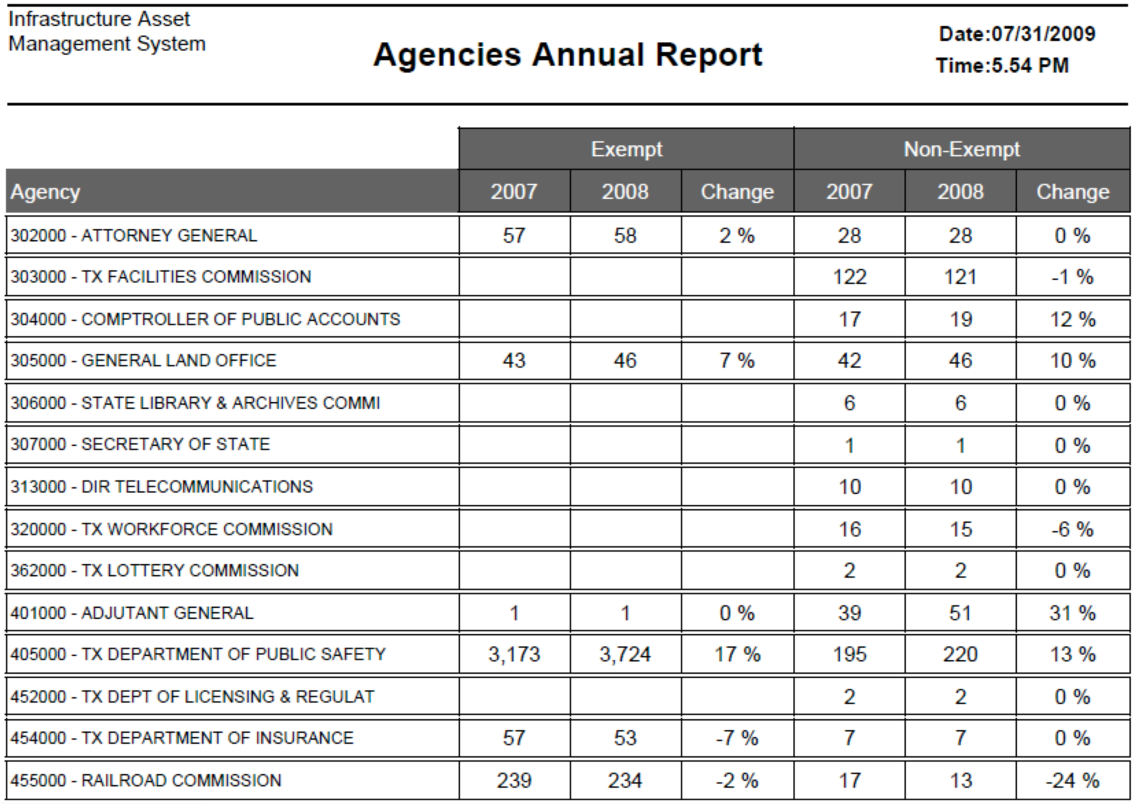
- Graphical Reports


Selection
Setup
Graph
Data
General
Usage
4000
3800
3600
3400
3200
3000
2800
2600
2400
2200
2000
1800
1600
1400
1200
1000
800
600
400
200
0
01-January
02-February
03-March
04-April
05-May
06-June
07-July
08-August
09-September
10-October
11-November
12-December
Effective Month
Parent Agency
🟥 405000 - TX DEPARTMENT OF PUBLIC SAFETY
🟩 601000 - DEPARTMENT OF TRANSPORTATION

Reports

Customized:

- Canned and Configured Reports (with parameters)



Infrastructure Asset
Management System

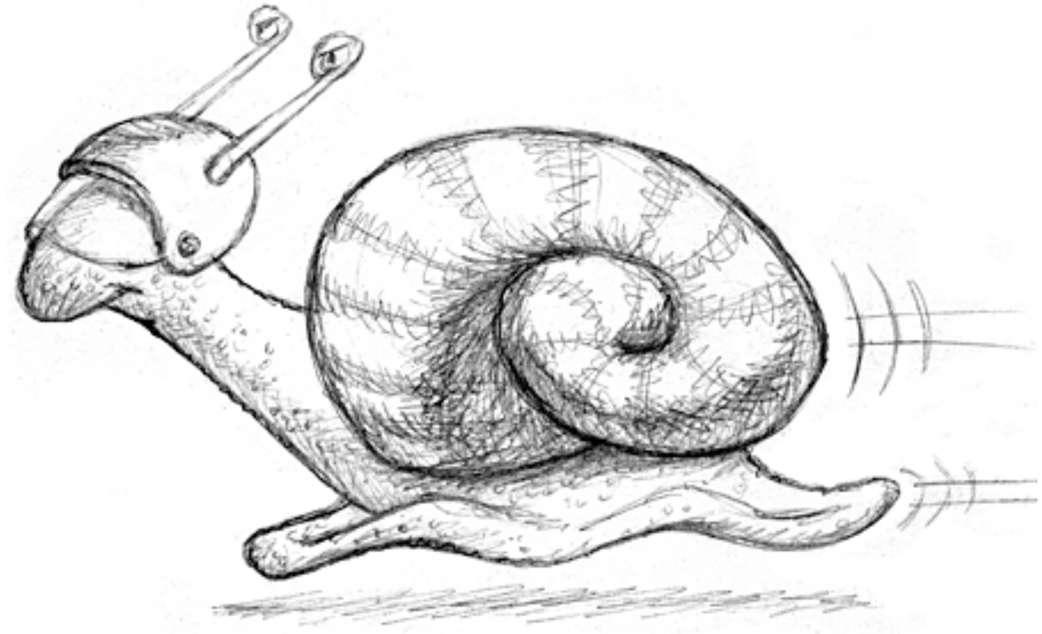
Agencies Annual Report

Date:07/31/2009
Time:5.54 PM

	Exempt			Non-Exempt		
Agency	2007	2008	Change	2007	2008	Change
302000 - ATTORNEY GENERAL	57	58	2 %	28	28	0 %
303000 - TX FACILITIES COMMISSION				122	121	-1 %
304000 - COMPTROLLER OF PUBLIC ACCOUNTS				17	19	12 %
305000 - GENERAL LAND OFFICE	43	46	7 %	42	46	10 %
306000 - STATE LIBRARY & ARCHIVES COMMI				6	6	0 %
307000 - SECRETARY OF STATE				1	1	0 %
313000 - DIR TELECOMMUNICATIONS				10	10	0 %
320000 - TX WORKFORCE COMMISSION				16	15	-6 %
362000 - TX LOTTERY COMMISSION				2	2	0 %
401000 - ADJUTANT GENERAL	1	1	0 %	39	51	31 %
405000 - TX DEPARTMENT OF PUBLIC SAFETY	3,173	3,724	17 %	195	220	13 %
452000 - TX DEPT OF LICENSING & REGULAT				2	2	0 %
454000 - TX DEPARTMENT OF INSURANCE	57	53	-7 %	7	7	0 %
455000 - RAILROAD COMMISSION	239	234	-2 %	17	13	-24 %

Questions

Let's Train



Hands On Training

Goals:

- Discover the system
- Learn the System
- Become the Expert
- Train other people back in your agencies

Hands On Training

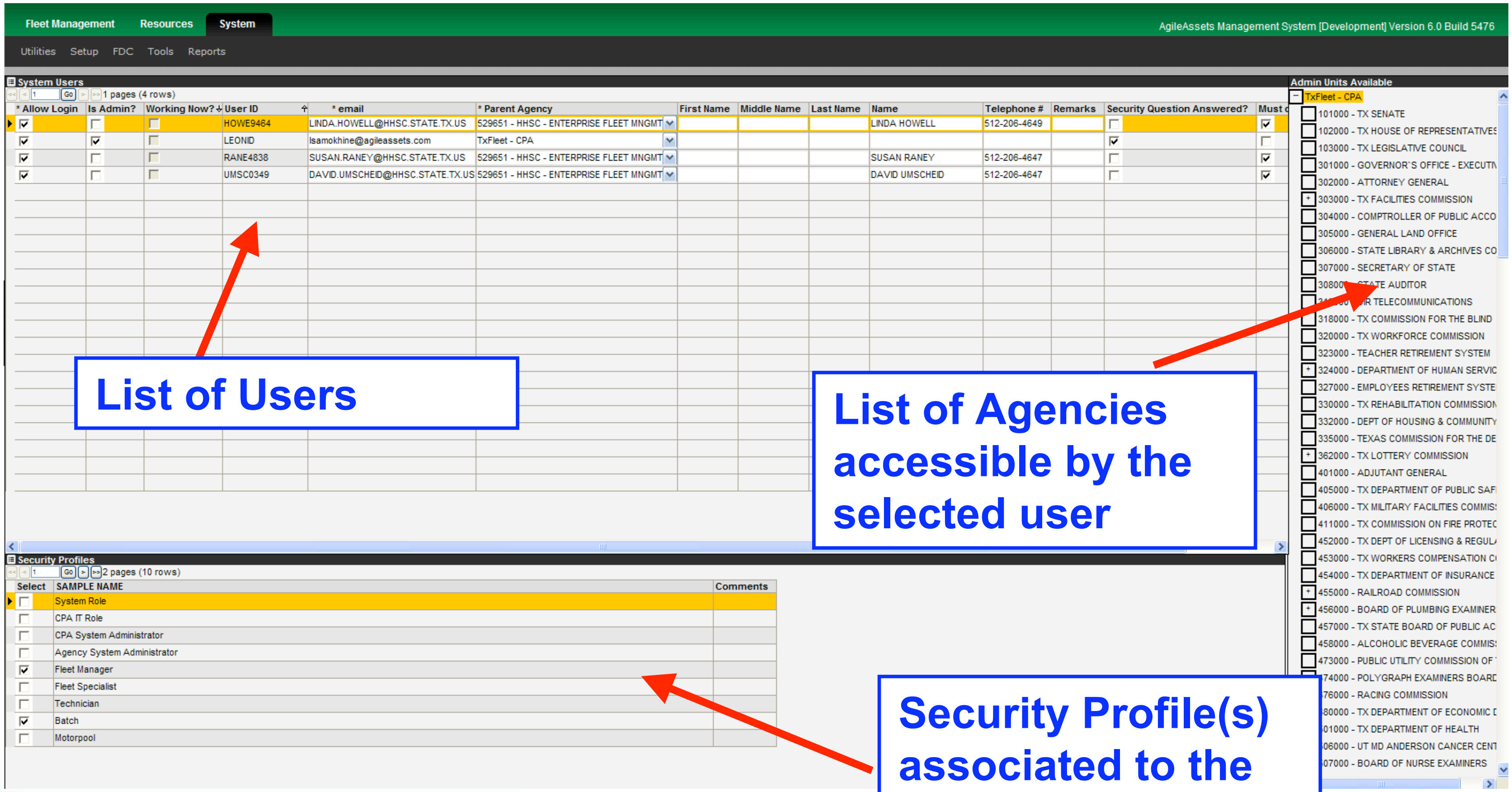
How:

- Trainer Presents the Topic – 2 minutes
- Trainer Demonstrate the Capability – 5 minutes
- You do it many times over!!! – 20 to 30 minutes
- Questions on the Topic – 5 mimutes

- Next Topic

1 – User Management

- Agencies System Administrators manage their users.


Fleet Management
Resources
System
AgileAssets Management System [Development] Version 6.0 Build 5476
Utilities
Setup
FDC
Tools
Reports

System Users

1 pages (4 rows)

* Allow Login	Is Admin?	Working Now?	User ID	* email	* Parent Agency	First Name	Middle Name	Last Name	Name	Telephone #	Remarks	Security Question Answered?	Must c
☑	☐	☐	HOWE9464	LINDA.HOWELL@HHSC.STATE.TX.US	529651 - HHSC - ENTERPRISE FLEET MNGMT				LINDA HOWELL	512-206-4649		☐	☑
☑	☑	☐	LEONID	lsamokhine@agileassets.com	TxFleet - CPA							☑	☐
☑	☐	☐	RANE4838	SUSAN.RANEY@HHSC.STATE.TX.US	529651 - HHSC - ENTERPRISE FLEET MNGMT				SUSAN RANEY	512-206-4647		☐	☑
☑	☐	☐	UMSC0349	DAVID.UMSCHEID@HHSC.STATE.TX.US	529651 - HHSC - ENTERPRISE FLEET MNGMT				DAVID UMSCHEID	512-206-4647		☐	☑

Security Profiles

2 pages (10 rows)

Select	SAMPLE NAME	Comments
☐	System Role	
☐	CPA IT Role	
☐	CPA System Administrator	
☐	Agency System Administrator	
☑	Fleet Manager	
☐	Fleet Specialist	
☐	Technician	
☑	Batch	
☐	Motorpool	

Admin Units Available

TxFleet - CPA
- ☐ 101000 - TX SENATE
- ☐ 102000 - TX HOUSE OF REPRESENTATIVES
- ☐ 103000 - TX LEGISLATIVE COUNCIL
- ☐ 301000 - GOVERNOR`S OFFICE - EXECUTIV
- ☐ 302000 - ATTORNEY GENERAL
- ☐ 303000 - TX FACILITIES COMMISSION
- ☐ 304000 - COMPTROLLER OF PUBLIC ACCO
- ☐ 305000 - GENERAL LAND OFFICE
- ☐ 306000 - STATE LIBRARY & ARCHIVES CO
- ☐ 307000 - SECRETARY OF STATE
- ☐ 30800[illegible] STATE AUDITOR
- ☐ [illegible] DIR TELECOMMUNICATIONS
- ☐ 318000 - TX COMMISSION FOR THE BLIND
- ☐ 320000 - TX WORKFORCE COMMISSION
- ☐ 323000 - TEACHER RETIREMENT SYSTEM
- ☐ 324000 - DEPARTMENT OF HUMAN SERVIC
- ☐ 327000 - EMPLOYEES RETIREMENT SYSTE
- ☐ 330000 - TX REHABILITATION COMMISSION
- ☐ 332000 - DEPT OF HOUSING & COMMUNITY
- ☐ 335000 - TEXAS COMMISSION FOR THE DE
- ☐ 362000 - TX LOTTERY COMMISSION
- ☐ 401000 - ADJUTANT GENERAL
- ☐ 405000 - TX DEPARTMENT OF PUBLIC SAF
- ☐ 406000 - TX MILITARY FACILITIES COMMIS
- ☐ 411000 - TX COMMISSION ON FIRE PROTEC
- ☐ 452000 - TX DEPT OF LICENSING & REGUL
- ☐ 453000 - TX WORKERS COMPENSATION C
- ☐ 454000 - TX DEPARTMENT OF INSURANCE
- ☐ 455000 - RAILROAD COMMISSION
- ☐ 456000 - BOARD OF PLUMBING EXAMINER
- ☐ 457000 - TX STATE BOARD OF PUBLIC AC
- ☐ 458000 - ALCOHOLIC BEVERAGE COMMIS
- ☐ 473000 - PUBLIC UTILITY COMMISSION OF
- 74000 - POLYGRAPH EXAMINERS BOARD
- 76000 - RACING COMMISSION
- 80000 - TX DEPARTMENT OF ECONOMIC D
- 01000 - TX DEPARTMENT OF HEALTH
- 06000 - UT MD ANDERSON CANCER CENT
- 07000 - BOARD OF NURSE EXAMINERS

List of Users

List of Agencies accessible by the selected user

Security Profile(s) associated to the user

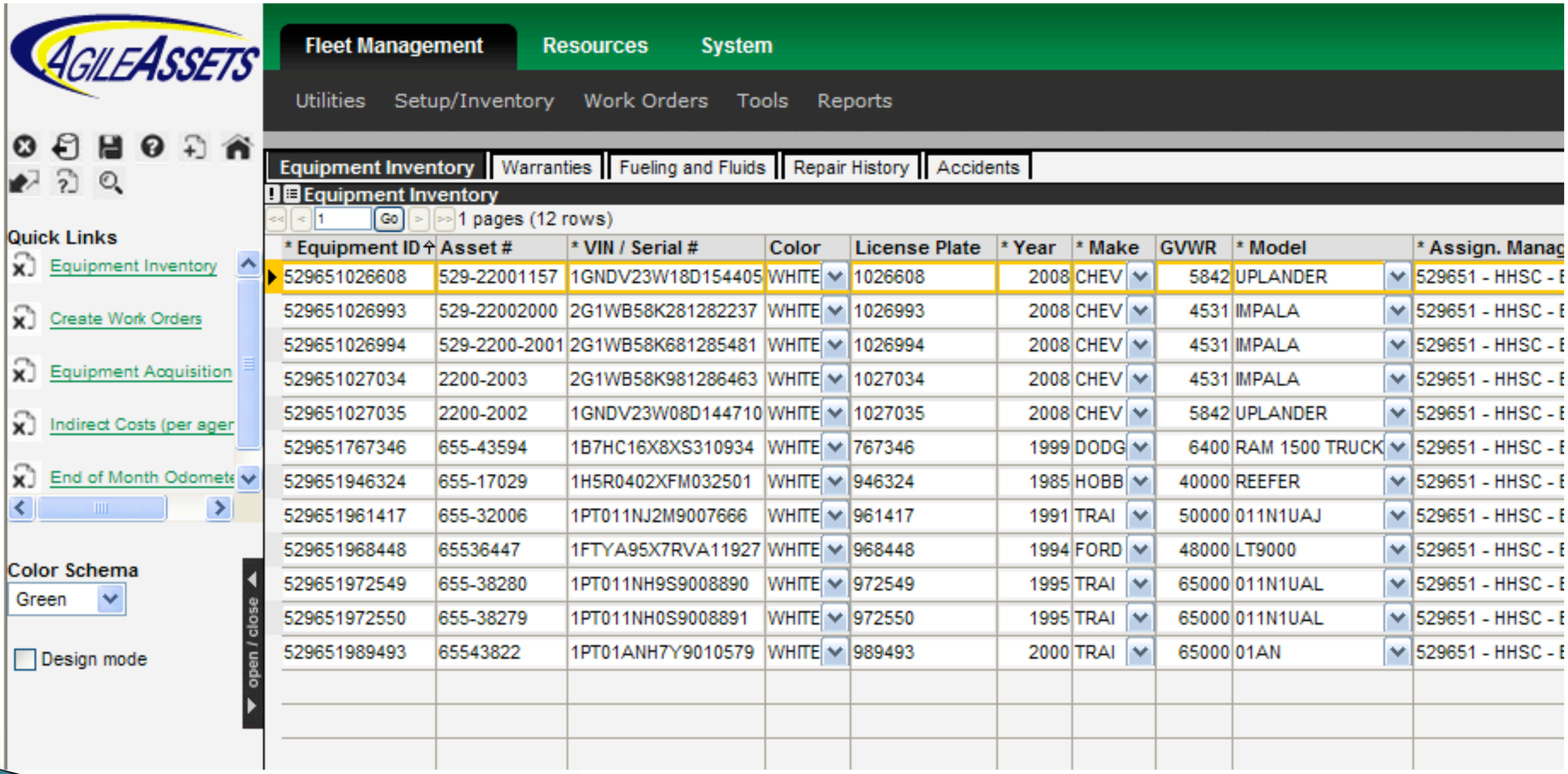
1 – User Management

- System > Utilities > User Names and Access
- Getting Started Tutorial pp. 6-9

- Exercise:
  - Find your users
  - Define the locations that he(they) can access
  - Define their security profiles
  - Create 2 new users (access and security profile)
  - Reset the password of your user(s)
  - Allow (or block) one of your users to login.
  - Force one of your users to reset his password.

2 – Equipment Inventory

- Displays all the equipments the selected agency (during login) owns or is assigned


AGILEASSETS
Fleet Management
Resources
System
Utilities
Setup/Inventory
Work Orders
Tools
Reports
Quick Links
Equipment Inventory
Create Work Orders
Equipment Acquisition
Indirect Costs (per ager
End of Month Odomete
Color Schema
Green
☐ Design mode
open / close
Equipment Inventory
Warranties
Fueling and Fluids
Repair History
Accidents
Equipment Inventory
1
Go
1 pages (12 rows)

* Equipment ID	Asset #	* VIN / Serial #	Color	License Plate	* Year	* Make	GVWR	* Model	* Assign. Manag
529651026608	529-22001157	1GNDV23W18D154405	WHITE	1026608	2008	CHEV	5842	UPLANDER	529651 - HHSC -
529651026993	529-22002000	2G1WB58K281282237	WHITE	1026993	2008	CHEV	4531	IMPALA	529651 - HHSC -
529651026994	529-2200-2001	2G1WB58K681285481	WHITE	1026994	2008	CHEV	4531	IMPALA	529651 - HHSC -
529651027034	2200-2003	2G1WB58K981286463	WHITE	1027034	2008	CHEV	4531	IMPALA	529651 - HHSC -
529651027035	2200-2002	1GNDV23W08D144710	WHITE	1027035	2008	CHEV	5842	UPLANDER	529651 - HHSC -
529651767346	655-43594	1B7HC16X8XS310934	WHITE	767346	1999	DODG	6400	RAM 1500 TRUCK	529651 - HHSC -
529651946324	655-17029	1H5R0402XFM032501	WHITE	946324	1985	HOBB	40000	REEFER	529651 - HHSC -
529651961417	655-32006	1PT011NJ2M9007666	WHITE	961417	1991	TRAI	50000	011N1UAJ	529651 - HHSC -
529651968448	65536447	1FTYA95X7RVA11927	WHITE	968448	1994	FORD	48000	LT9000	529651 - HHSC -
529651972549	655-38280	1PT011NH9S9008890	WHITE	972549	1995	TRAI	65000	011N1UAL	529651 - HHSC -
529651972550	655-38279	1PT011NH0S9008891	WHITE	972550	1995	TRAI	65000	011N1UAL	529651 - HHSC -
529651989493	65543822	1PT01ANH7Y9010579	WHITE	989493	2000	TRAI	65000	01AN	529651 - HHSC -

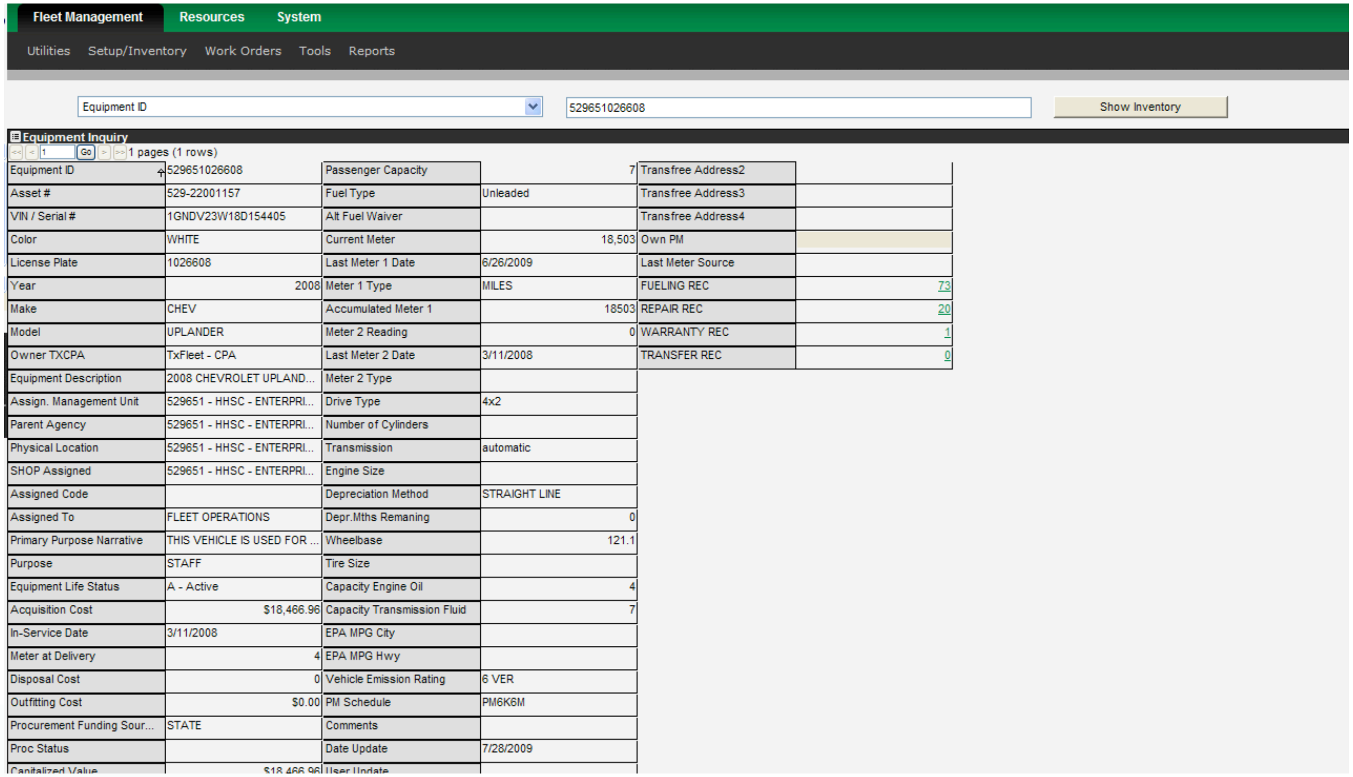
2 – Equipment Inventory

- Fleet Management > Setup/Inventory > Equipment Inventory > Equipment Inventory
- Getting Started Tutorial pp. 46-50

- Exercise:
  - Review your equipments
  - Select an equipment and edit the data (Required fields)
  - Display a specific equipment in Form view
  - Use the Filter (right-click)
  - Export the data (right-click)
  - Print the data (in grid or form view) (right-click)
  - Click on the hyperlinks (Fuel Types, Transfer History, etc…)

3 – Equipment Inquiry

- Allows for a quick search (across all agencies)
  - Search Criteria
  - Search Value



Equipment ID: 529651026608

Equipment ID	529651026608	Passenger Capacity	7	Transfree Address2	
Asset #	529-22001157	Fuel Type	Unleaded	Transfree Address3	
VIN / Serial #	1GNDV23W18D154405	Alt Fuel Waiver		Transfree Address4	
Color	WHITE	Current Meter	18,503	Own PM	
License Plate	1026608	Last Meter 1 Date	6/26/2009	Last Meter Source	
Year	2008	Meter 1 Type	MILES	FUELING REC	73
Make	CHEV	Accumulated Meter 1	18503	REPAIR REC	20
Model	UPLANDER	Meter 2 Reading	0	WARRANTY REC	1
Owner TXCPA	TxFleet - CPA	Last Meter 2 Date	3/11/2008	TRANSFER REC	0
Equipment Description	2008 CHEVROLET UPLAND...	Meter 2 Type			
Assign. Management Unit	529651 - HHSC - ENTERPRI...	Drive Type	4x2		
Parent Agency	529651 - HHSC - ENTERPRI...	Number of Cylinders			
Physical Location	529651 - HHSC - ENTERPRI...	Transmission	automatic		
SHOP Assigned	529651 - HHSC - ENTERPRI...	Engine Size			
Assigned Code		Depreciation Method	STRAIGHT LINE		
Assigned To	FLEET OPERATIONS	Depr.Mths Remaning	0		
Primary Purpose Narrative	THIS VEHICLE IS USED FOR ...	Wheelbase	121.1		
Purpose	STAFF	Tire Size			
Equipment Life Status	A - Active	Capacity Engine Oil	4		
Acquisition Cost	$18,466.96	Capacity Transmission Fluid	7		
In-Service Date	3/11/2008	EPA MPG City			
Meter at Delivery	4	EPA MPG Hwy			
Disposal Cost	0	Vehicle Emission Rating	6 VER		
Outfitting Cost	$0.00	PM Schedule	PM6K6M		
Procurement Funding Sour...	STATE	Comments			
Proc Status		Date Update	7/28/2009		
Capitalized Value	$18,466.96	User Update			

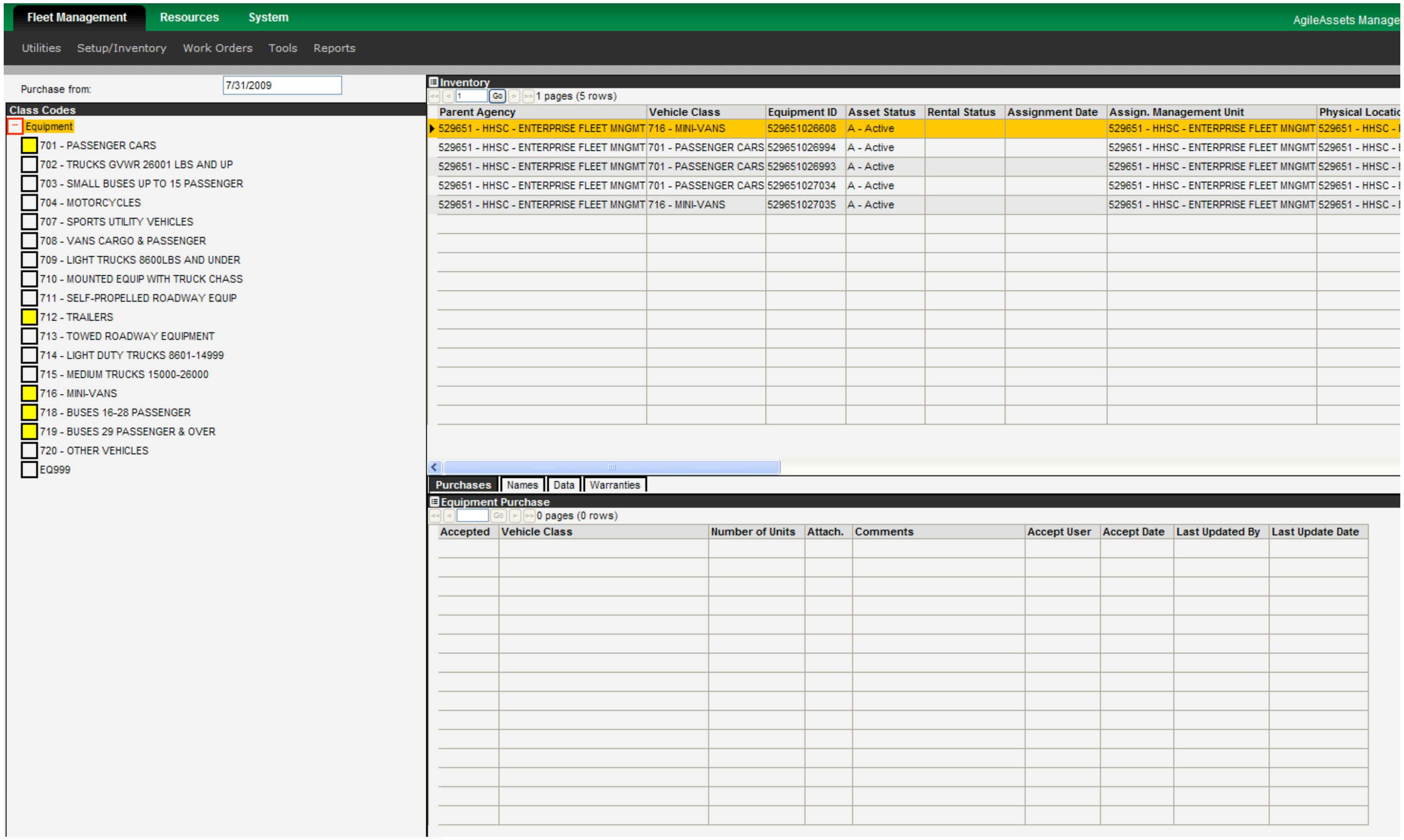
3 – Equipment Inquiry

- Fleet Management > Setup/Inventory > Equipment Inquiry
- Getting Started Tutorial pp. 50-51

- Exercise:
  - Look for a specific equipment
  - Change your search criteria (Asset #)
  - Use Wildcards (%) in your search value

4 – Equipment Acquisition

- Allows for acquiring new vehicles



Purchase from: 7/31/2009

Class Codes

Equipment
- 🟨 701 - PASSENGER CARS
- ☐ 702 - TRUCKS GVWR 26001 LBS AND UP
- ☐ 703 - SMALL BUSES UP TO 15 PASSENGER
- ☐ 704 - MOTORCYCLES
- ☐ 707 - SPORTS UTILITY VEHICLES
- ☐ 708 - VANS CARGO & PASSENGER
- ☐ 709 - LIGHT TRUCKS 8600LBS AND UNDER
- ☐ 710 - MOUNTED EQUIP WITH TRUCK CHASS
- ☐ 711 - SELF-PROPELLED ROADWAY EQUIP
- 🟨 712 - TRAILERS
- ☐ 713 - TOWED ROADWAY EQUIPMENT
- ☐ 714 - LIGHT DUTY TRUCKS 8601-14999
- ☐ 715 - MEDIUM TRUCKS 15000-26000
- 🟨 716 - MINI-VANS
- 🟨 718 - BUSES 16-28 PASSENGER
- 🟨 719 - BUSES 29 PASSENGER & OVER
- ☐ 720 - OTHER VEHICLES
- ☐ EQ999

Inventory

1 pages (5 rows)

Parent Agency	Vehicle Class	Equipment ID	Asset Status	Rental Status	Assignment Date	Assign. Management Unit	Physical Locati
529651 - HHSC - ENTERPRISE FLEET MNGMT	716 - MINI-VANS	529651026608	A - Active			529651 - HHSC - ENTERPRISE FLEET MNGMT	529651 - HHSC -
529651 - HHSC - ENTERPRISE FLEET MNGMT	701 - PASSENGER CARS	529651026994	A - Active			529651 - HHSC - ENTERPRISE FLEET MNGMT	529651 - HHSC -
529651 - HHSC - ENTERPRISE FLEET MNGMT	701 - PASSENGER CARS	529651026993	A - Active			529651 - HHSC - ENTERPRISE FLEET MNGMT	529651 - HHSC -
529651 - HHSC - ENTERPRISE FLEET MNGMT	701 - PASSENGER CARS	529651027034	A - Active			529651 - HHSC - ENTERPRISE FLEET MNGMT	529651 - HHSC -
529651 - HHSC - ENTERPRISE FLEET MNGMT	716 - MINI-VANS	529651027035	A - Active			529651 - HHSC - ENTERPRISE FLEET MNGMT	529651 - HHSC -

Equipment Purchase

0 pages (0 rows)

Accepted	Vehicle Class	Number of Units	Attach.	Comments	Accept User	Accept Date	Last Updated By	Last Update Date

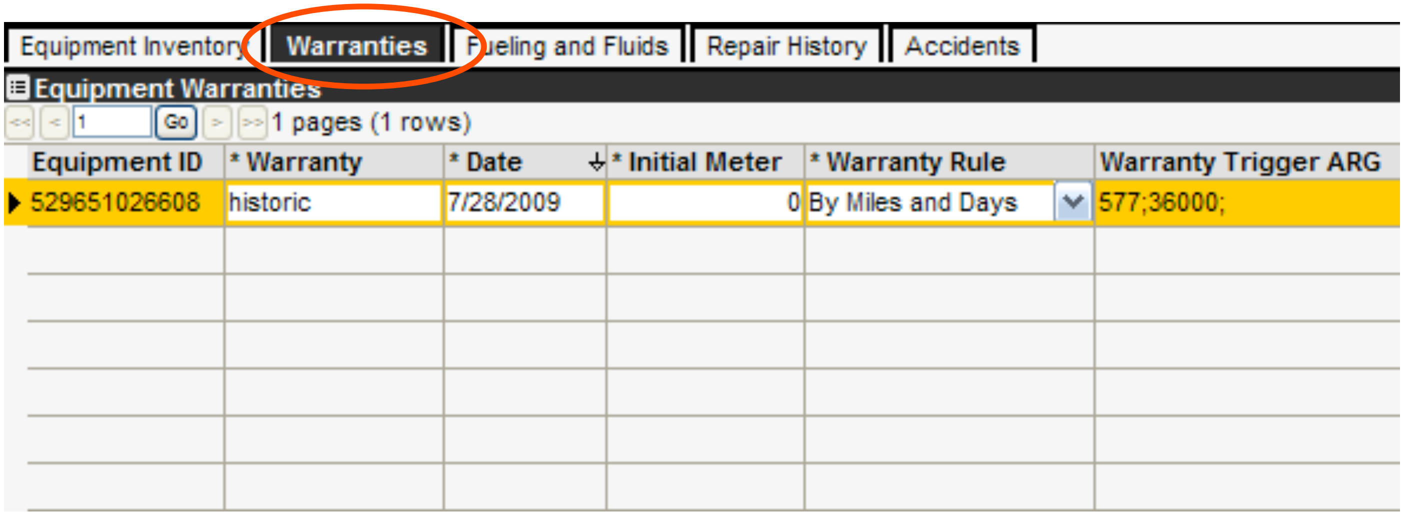
4 – Equipment Acquisition

- Fleet Management > Setup/Inventory > Equipment Acquisition
- Getting Started Tutorial pp. 51-52

- Exercise:
  - Acquire one 701 - Passenger Car
  - Acquire three 716 - Mini-Van
  - Verify that equipments are added to the Inventory
  - Define fuel types for acquired vehicles in Equipment Inventory window.

5 – Equipment Warranties

- Allows you to review/define warranties for the selected equipment and its associated parts.


Equipment Inventory
Warranties
Fueling and Fluids
Repair History
Accidents
Equipment Warranties
1
Go
1 pages (1 rows)

Equipment ID	* Warranty	* Date	* Initial Meter	* Warranty Rule	Warranty Trigger ARG
529651026608	historic	7/28/2009	0	By Miles and Days	577;36000;

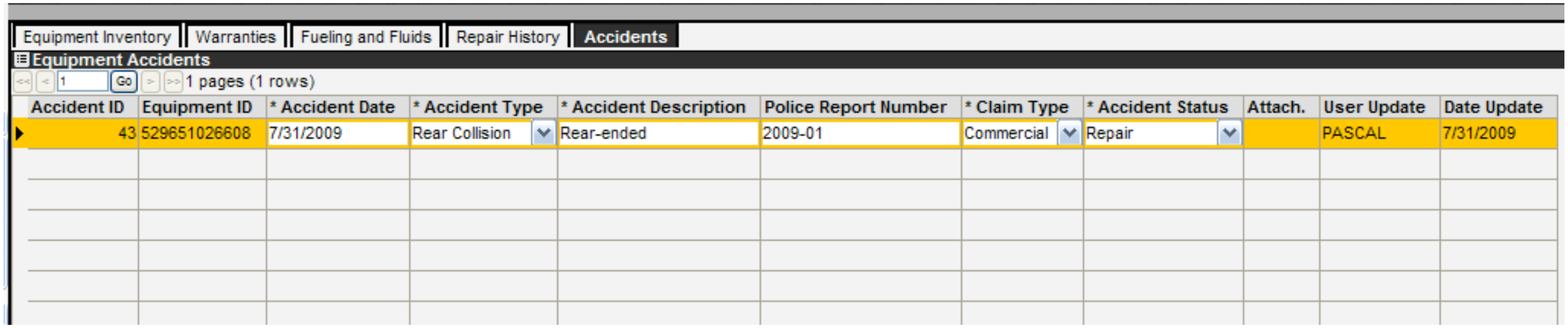
5 – Equipment Warranties

- Fleet Management > Setup/Inventory > Equipment Inventory > Equipment Inventory
- Getting Started Tutorial pp. 47-48

- Exercise:
  - Select a vehicle
  - Review warranty data
  - Enter 5 new warranties on various equipments

6 – Equipment Accidents

- Allows for recording accidents involving your equipments (and then later associate them to repair orders if desired)


Equipment Inventory
Warranties
Fueling and Fluids
Repair History
Accidents
Equipment Accidents
Go
1 pages (1 rows)

Accident ID	Equipment ID	* Accident Date	* Accident Type	* Accident Description	Police Report Number	* Claim Type	* Accident Status	Attach.	User Update	Date Update
43	529651026608	7/31/2009	Rear Collision	Rear-ended	2009-01	Commercial	Repair		PASCAL	7/31/2009

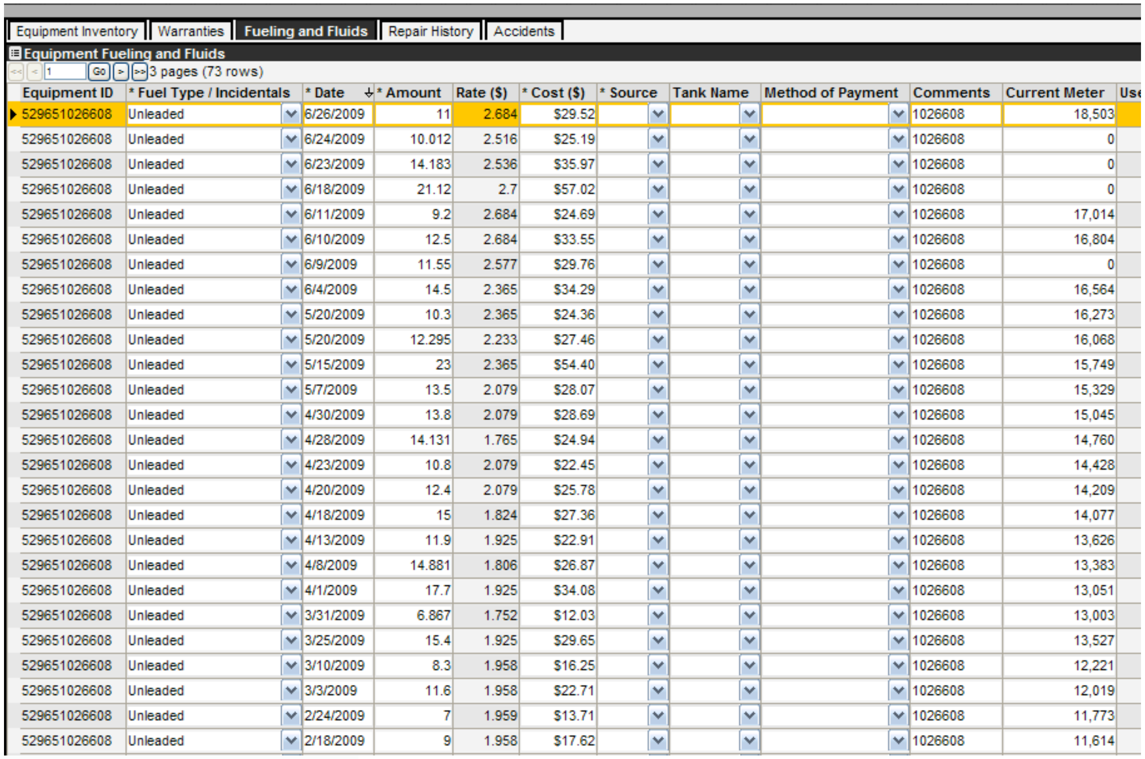
6 – Equipment Accidents

- Fleet Management > Setup/Inventory > Equipment Inventory > Equipment Inventory
- Getting Started Tutorial pp. 50

- Exercise:
  - Select a vehicle
  - Enter 2 accidents on an equipment
  - Enter one accident on at least 5 different vehicles

7 – Fueling and Incidentals

- Allows for capturing hit-by-hits transactions for fueling or incidental.



Equipment ID	* Fuel Type / Incidentals	* Date	* Amount	Rate ($)	* Cost ($)	* Source	Tank Name	Method of Payment	Comments	Current Meter	Use
529651026608	Unleaded	6/26/2009	11	2.684	$29.52				1026608	18,503	
529651026608	Unleaded	6/24/2009	10.012	2.516	$25.19				1026608	0	
529651026608	Unleaded	6/23/2009	14.183	2.536	$35.97				1026608	0	
529651026608	Unleaded	6/18/2009	21.12	2.7	$57.02				1026608	0	
529651026608	Unleaded	6/11/2009	9.2	2.684	$24.69				1026608	17,014	
529651026608	Unleaded	6/10/2009	12.5	2.684	$33.55				1026608	16,804	
529651026608	Unleaded	6/9/2009	11.55	2.577	$29.76				1026608	0	
529651026608	Unleaded	6/4/2009	14.5	2.365	$34.29				1026608	16,564	
529651026608	Unleaded	5/20/2009	10.3	2.365	$24.36				1026608	16,273	
529651026608	Unleaded	5/20/2009	12.295	2.233	$27.46				1026608	16,068	
529651026608	Unleaded	5/15/2009	23	2.365	$54.40				1026608	15,749	
529651026608	Unleaded	5/7/2009	13.5	2.079	$28.07				1026608	15,329	
529651026608	Unleaded	4/30/2009	13.8	2.079	$28.69				1026608	15,045	
529651026608	Unleaded	4/28/2009	14.131	1.765	$24.94				1026608	14,760	
529651026608	Unleaded	4/23/2009	10.8	2.079	$22.45				1026608	14,428	
529651026608	Unleaded	4/20/2009	12.4	2.079	$25.78				1026608	14,209	
529651026608	Unleaded	4/18/2009	15	1.824	$27.36				1026608	14,077	
529651026608	Unleaded	4/13/2009	11.9	1.925	$22.91				1026608	13,626	
529651026608	Unleaded	4/8/2009	14.881	1.806	$26.87				1026608	13,383	
529651026608	Unleaded	4/1/2009	17.7	1.925	$34.08				1026608	13,051	
529651026608	Unleaded	3/31/2009	6.867	1.752	$12.03				1026608	13,003	
529651026608	Unleaded	3/25/2009	15.4	1.925	$29.65				1026608	13,527	
529651026608	Unleaded	3/10/2009	8.3	1.958	$16.25				1026608	12,221	
529651026608	Unleaded	3/3/2009	11.6	1.958	$22.71				1026608	12,019	
529651026608	Unleaded	2/24/2009	7	1.959	$13.71				1026608	11,773	
529651026608	Unleaded	2/18/2009	9	1.958	$17.62				1026608	11,614	

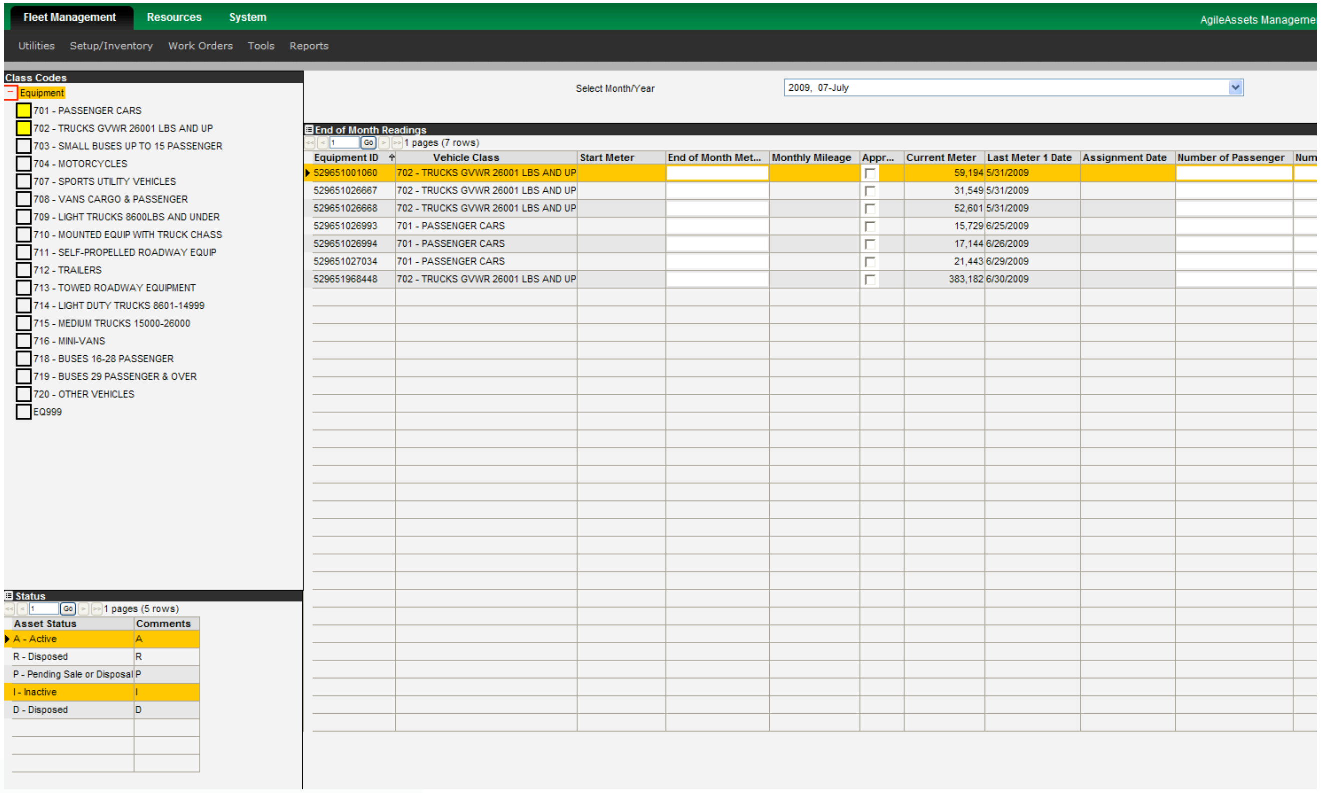
7 – Fueling and Incidental

- Fleet Management > Setup/Inventory > Equipment Inventory > Equipment Inventory
- Getting Started Tutorial pp. 48-49

- Exercise:
  - Select a vehicle
  - Enter several fueling transactions
  - Enter several Incidental transactions
  - Enter at least one internal fuel transaction (by selecting an internal tank)

8 – End of Month Odometer Readings

- Allows for capturing end-of-month meter readings



Class Codes

Equipment
- 🟨 701 - PASSENGER CARS
- 🟨 702 - TRUCKS GVWR 26001 LBS AND UP
- ☐ 703 - SMALL BUSES UP TO 15 PASSENGER
- ☐ 704 - MOTORCYCLES
- ☐ 707 - SPORTS UTILITY VEHICLES
- ☐ 708 - VANS CARGO & PASSENGER
- ☐ 709 - LIGHT TRUCKS 8600LBS AND UNDER
- ☐ 710 - MOUNTED EQUIP WITH TRUCK CHASS
- ☐ 711 - SELF-PROPELLED ROADWAY EQUIP
- ☐ 712 - TRAILERS
- ☐ 713 - TOWED ROADWAY EQUIPMENT
- ☐ 714 - LIGHT DUTY TRUCKS 8601-14999
- ☐ 715 - MEDIUM TRUCKS 15000-26000
- ☐ 716 - MINI-VANS
- ☐ 718 - BUSES 16-28 PASSENGER
- ☐ 719 - BUSES 29 PASSENGER & OVER
- ☐ 720 - OTHER VEHICLES
- ☐ EQ999

Select Month/Year: 2009, 07-July

End of Month Readings

1 pages (7 rows)

Equipment ID	Vehicle Class	Start Meter	End of Month Met...	Monthly Mileage	Appr...	Current Meter	Last Meter 1 Date	Assignment Date	Number of Passenger	Num
529651001060	702 - TRUCKS GVWR 26001 LBS AND UP				☐	59,194	5/31/2009			
529651026667	702 - TRUCKS GVWR 26001 LBS AND UP				☐	31,549	5/31/2009			
529651026668	702 - TRUCKS GVWR 26001 LBS AND UP				☐	52,601	5/31/2009			
529651026993	701 - PASSENGER CARS				☐	15,729	6/25/2009			
529651026994	701 - PASSENGER CARS				☐	17,144	6/26/2009			
529651027034	701 - PASSENGER CARS				☐	21,443	6/29/2009			
529651968448	702 - TRUCKS GVWR 26001 LBS AND UP				☐	383,182	6/30/2009			

Status

1 pages (5 rows)

Asset Status	Comments
A - Active	A
R - Disposed	R
P - Pending Sale or Disposal	P
I - Inactive	I
D - Disposed	D

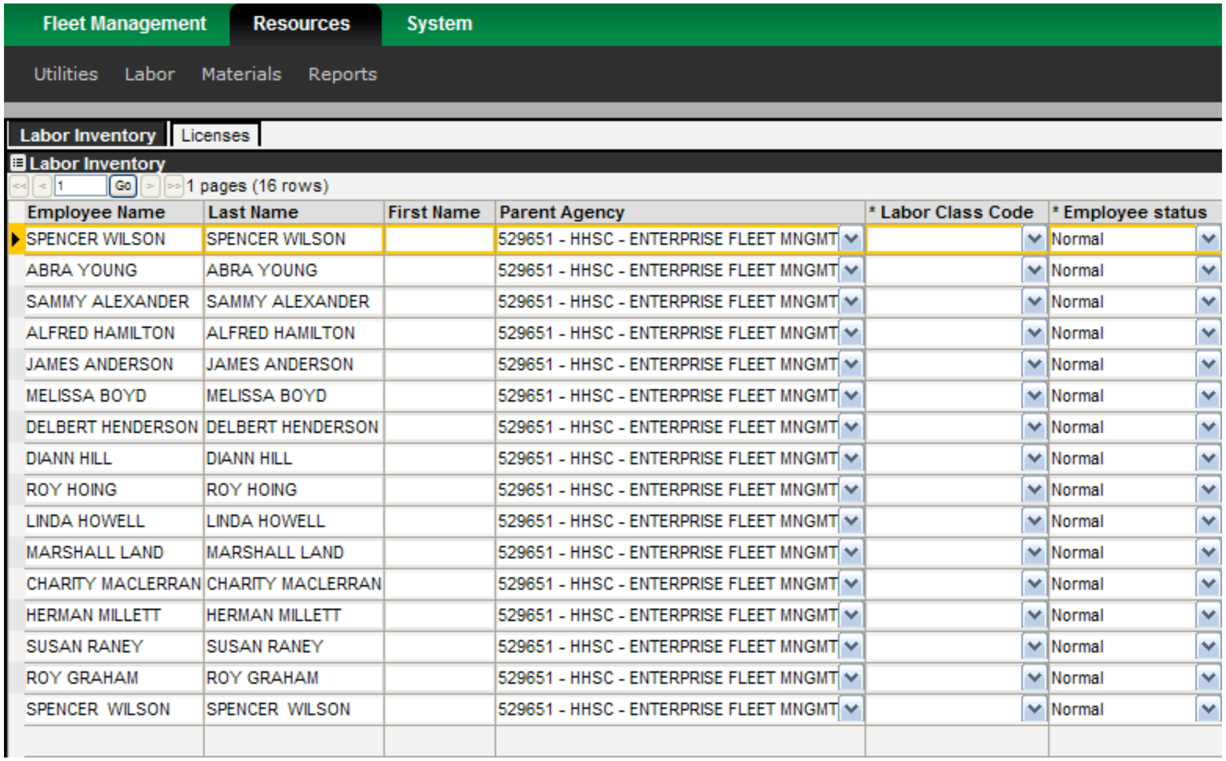
8 – End of Month Odometer Readings

- Fleet Management > Setup/Inventory > Equipment Inventory > Equipment Inventory
- Getting Started Tutorial pp. 55-56

- Exercise:
  - Select all vehicle class
  - Select vehicle life status
  - Select month (May 2009)
  - Enter meter reading
  - Approve
  - Select next month (June 2009)
  - Enter readings
  - Approve

9 – Resources – Labor Inventory

- Allows to manage in-house resources to be used with in-house repairs



1 pages (16 rows)

Employee Name	Last Name	First Name	Parent Agency	* Labor Class Code	* Employee status
SPENCER WILSON	SPENCER WILSON		529651 - HHSC - ENTERPRISE FLEET MNGMT		Normal
ABRA YOUNG	ABRA YOUNG		529651 - HHSC - ENTERPRISE FLEET MNGMT		Normal
SAMMY ALEXANDER	SAMMY ALEXANDER		529651 - HHSC - ENTERPRISE FLEET MNGMT		Normal
ALFRED HAMILTON	ALFRED HAMILTON		529651 - HHSC - ENTERPRISE FLEET MNGMT		Normal
JAMES ANDERSON	JAMES ANDERSON		529651 - HHSC - ENTERPRISE FLEET MNGMT		Normal
MELISSA BOYD	MELISSA BOYD		529651 - HHSC - ENTERPRISE FLEET MNGMT		Normal
DELBERT HENDERSON	DELBERT HENDERSON		529651 - HHSC - ENTERPRISE FLEET MNGMT		Normal
DIANN HILL	DIANN HILL		529651 - HHSC - ENTERPRISE FLEET MNGMT		Normal
ROY HOING	ROY HOING		529651 - HHSC - ENTERPRISE FLEET MNGMT		Normal
LINDA HOWELL	LINDA HOWELL		529651 - HHSC - ENTERPRISE FLEET MNGMT		Normal
MARSHALL LAND	MARSHALL LAND		529651 - HHSC - ENTERPRISE FLEET MNGMT		Normal
CHARITY MACLERRAN	CHARITY MACLERRAN		529651 - HHSC - ENTERPRISE FLEET MNGMT		Normal
HERMAN MILLETT	HERMAN MILLETT		529651 - HHSC - ENTERPRISE FLEET MNGMT		Normal
SUSAN RANEY	SUSAN RANEY		529651 - HHSC - ENTERPRISE FLEET MNGMT		Normal
ROY GRAHAM	ROY GRAHAM		529651 - HHSC - ENTERPRISE FLEET MNGMT		Normal
SPENCER WILSON	SPENCER WILSON		529651 - HHSC - ENTERPRISE FLEET MNGMT		Normal

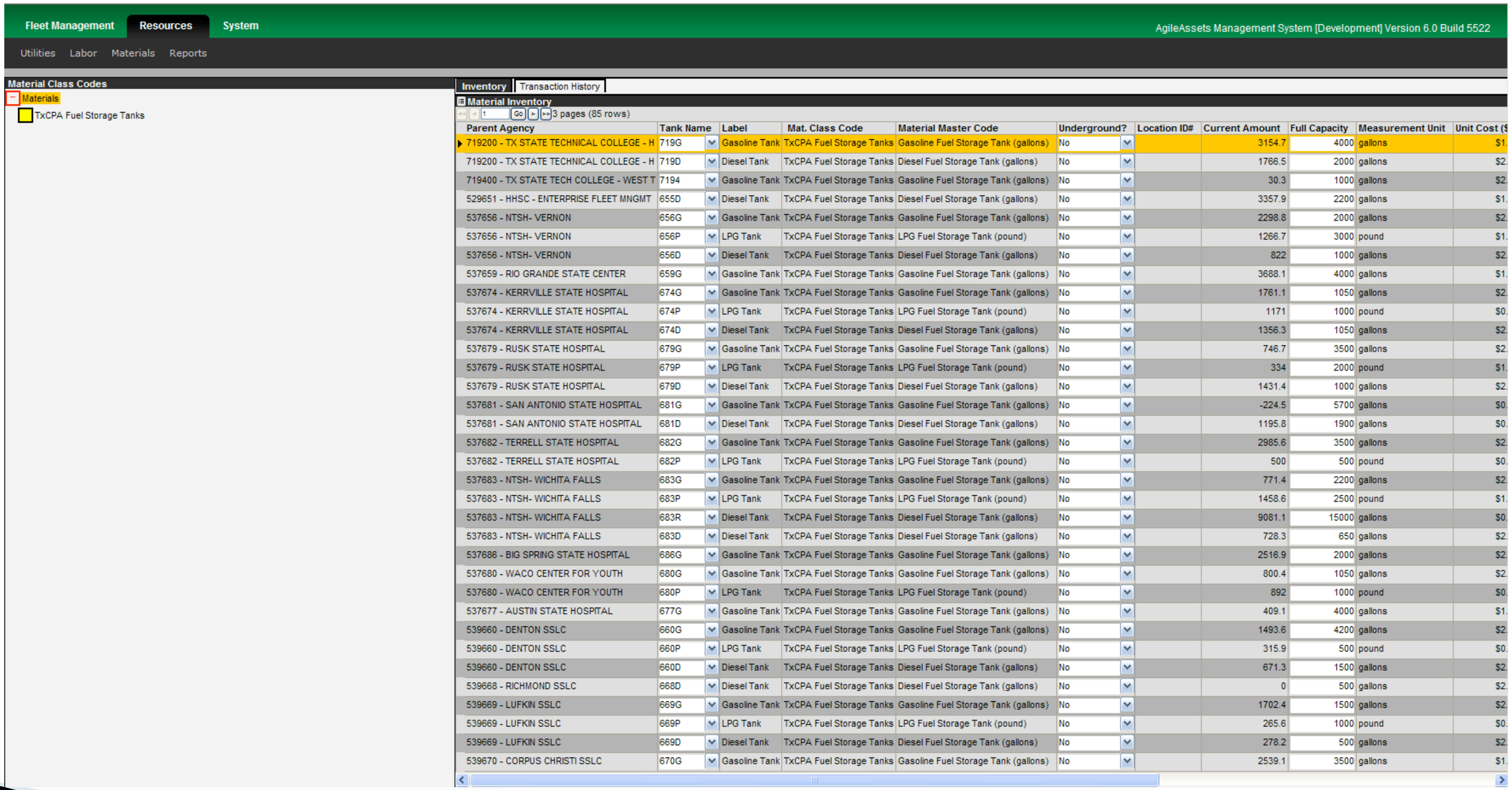
9 – Resources – Labor Inventory

- Resources > Labor > Inventory > Labor Inventory
- Getting Started Tutorial pp. 57-58

- Exercise:
  - Review list of employees
  - Add 2 new employees
  - Add licenses to at least 2 employees

10 – Resources – Material Inventory

- Allows for reviewing the material inventory available owned by your agency (or its children)



Parent Agency	Tank Name	Label	Mat. Class Code	Material Master Code	Underground?	Location ID#	Current Amount	Full Capacity	Measurement Unit	Unit Cost ($
719200 - TX STATE TECHNICAL COLLEGE - H	719G	Gasoline Tank	TxCPA Fuel Storage Tanks	Gasoline Fuel Storage Tank (gallons)	No		3154.7	4000	gallons	$1.
719200 - TX STATE TECHNICAL COLLEGE - H	719D	Diesel Tank	TxCPA Fuel Storage Tanks	Diesel Fuel Storage Tank (gallons)	No		1766.5	2000	gallons	$2.
719400 - TX STATE TECH COLLEGE - WEST T	7194	Gasoline Tank	TxCPA Fuel Storage Tanks	Gasoline Fuel Storage Tank (gallons)	No		30.3	1000	gallons	$2.
529651 - HHSC - ENTERPRISE FLEET MNGMT	655D	Diesel Tank	TxCPA Fuel Storage Tanks	Diesel Fuel Storage Tank (gallons)	No		3357.9	2200	gallons	$1.
537656 - NTSH- VERNON	656G	Gasoline Tank	TxCPA Fuel Storage Tanks	Gasoline Fuel Storage Tank (gallons)	No		2298.8	2000	gallons	$2.
537656 - NTSH- VERNON	656P	LPG Tank	TxCPA Fuel Storage Tanks	LPG Fuel Storage Tank (pound)	No		1266.7	3000	pound	$1.
537656 - NTSH- VERNON	656D	Diesel Tank	TxCPA Fuel Storage Tanks	Diesel Fuel Storage Tank (gallons)	No		822	1000	gallons	$2.
537659 - RIO GRANDE STATE CENTER	659G	Gasoline Tank	TxCPA Fuel Storage Tanks	Gasoline Fuel Storage Tank (gallons)	No		3688.1	4000	gallons	$1.
537674 - KERRVILLE STATE HOSPITAL	674G	Gasoline Tank	TxCPA Fuel Storage Tanks	Gasoline Fuel Storage Tank (gallons)	No		1761.1	1050	gallons	$2.
537674 - KERRVILLE STATE HOSPITAL	674P	LPG Tank	TxCPA Fuel Storage Tanks	LPG Fuel Storage Tank (pound)	No		1171	1000	pound	$0.
537674 - KERRVILLE STATE HOSPITAL	674D	Diesel Tank	TxCPA Fuel Storage Tanks	Diesel Fuel Storage Tank (gallons)	No		1356.3	1050	gallons	$2.
537679 - RUSK STATE HOSPITAL	679G	Gasoline Tank	TxCPA Fuel Storage Tanks	Gasoline Fuel Storage Tank (gallons)	No		746.7	3500	gallons	$2.
537679 - RUSK STATE HOSPITAL	679P	LPG Tank	TxCPA Fuel Storage Tanks	LPG Fuel Storage Tank (pound)	No		334	2000	pound	$1.
537679 - RUSK STATE HOSPITAL	679D	Diesel Tank	TxCPA Fuel Storage Tanks	Diesel Fuel Storage Tank (gallons)	No		1431.4	1000	gallons	$2.
537681 - SAN ANTONIO STATE HOSPITAL	681G	Gasoline Tank	TxCPA Fuel Storage Tanks	Gasoline Fuel Storage Tank (gallons)	No		-224.5	5700	gallons	$0.
537681 - SAN ANTONIO STATE HOSPITAL	681D	Diesel Tank	TxCPA Fuel Storage Tanks	Diesel Fuel Storage Tank (gallons)	No		1195.8	1900	gallons	$0.
537682 - TERRELL STATE HOSPITAL	682G	Gasoline Tank	TxCPA Fuel Storage Tanks	Gasoline Fuel Storage Tank (gallons)	No		2985.6	3500	gallons	$2.
537682 - TERRELL STATE HOSPITAL	682P	LPG Tank	TxCPA Fuel Storage Tanks	LPG Fuel Storage Tank (pound)	No		500	500	pound	$0.
537683 - NTSH- WICHITA FALLS	683G	Gasoline Tank	TxCPA Fuel Storage Tanks	Gasoline Fuel Storage Tank (gallons)	No		771.4	2200	gallons	$2.
537683 - NTSH- WICHITA FALLS	683P	LPG Tank	TxCPA Fuel Storage Tanks	LPG Fuel Storage Tank (pound)	No		1458.6	2500	pound	$1.
537683 - NTSH- WICHITA FALLS	683R	Diesel Tank	TxCPA Fuel Storage Tanks	Diesel Fuel Storage Tank (gallons)	No		9081.1	15000	gallons	$0.
537683 - NTSH- WICHITA FALLS	683D	Diesel Tank	TxCPA Fuel Storage Tanks	Diesel Fuel Storage Tank (gallons)	No		728.3	650	gallons	$2.
537686 - BIG SPRING STATE HOSPITAL	686G	Gasoline Tank	TxCPA Fuel Storage Tanks	Gasoline Fuel Storage Tank (gallons)	No		2516.9	2000	gallons	$2.
537680 - WACO CENTER FOR YOUTH	680G	Gasoline Tank	TxCPA Fuel Storage Tanks	Gasoline Fuel Storage Tank (gallons)	No		800.4	1050	gallons	$2.
537680 - WACO CENTER FOR YOUTH	680P	LPG Tank	TxCPA Fuel Storage Tanks	LPG Fuel Storage Tank (pound)	No		892	1000	pound	$0.
537677 - AUSTIN STATE HOSPITAL	677G	Gasoline Tank	TxCPA Fuel Storage Tanks	Gasoline Fuel Storage Tank (gallons)	No		409.1	4000	gallons	$1.
539660 - DENTON SSLC	660G	Gasoline Tank	TxCPA Fuel Storage Tanks	Gasoline Fuel Storage Tank (gallons)	No		1493.6	4200	gallons	$2.
539660 - DENTON SSLC	660P	LPG Tank	TxCPA Fuel Storage Tanks	LPG Fuel Storage Tank (pound)	No		315.9	500	pound	$0.
539660 - DENTON SSLC	660D	Diesel Tank	TxCPA Fuel Storage Tanks	Diesel Fuel Storage Tank (gallons)	No		671.3	1500	gallons	$2.
539668 - RICHMOND SSLC	668D	Diesel Tank	TxCPA Fuel Storage Tanks	Diesel Fuel Storage Tank (gallons)	No		0	500	gallons	$2.
539669 - LUFKIN SSLC	669G	Gasoline Tank	TxCPA Fuel Storage Tanks	Gasoline Fuel Storage Tank (gallons)	No		1702.4	1500	gallons	$2.
539669 - LUFKIN SSLC	669P	LPG Tank	TxCPA Fuel Storage Tanks	LPG Fuel Storage Tank (pound)	No		265.6	1000	pound	$0.
539669 - LUFKIN SSLC	669D	Diesel Tank	TxCPA Fuel Storage Tanks	Diesel Fuel Storage Tank (gallons)	No		278.2	500	gallons	$2.
539670 - CORPUS CHRISTI SSLC	670G	Gasoline Tank	TxCPA Fuel Storage Tanks	Gasoline Fuel Storage Tank (gallons)	No		2539.1	3500	gallons	$1.

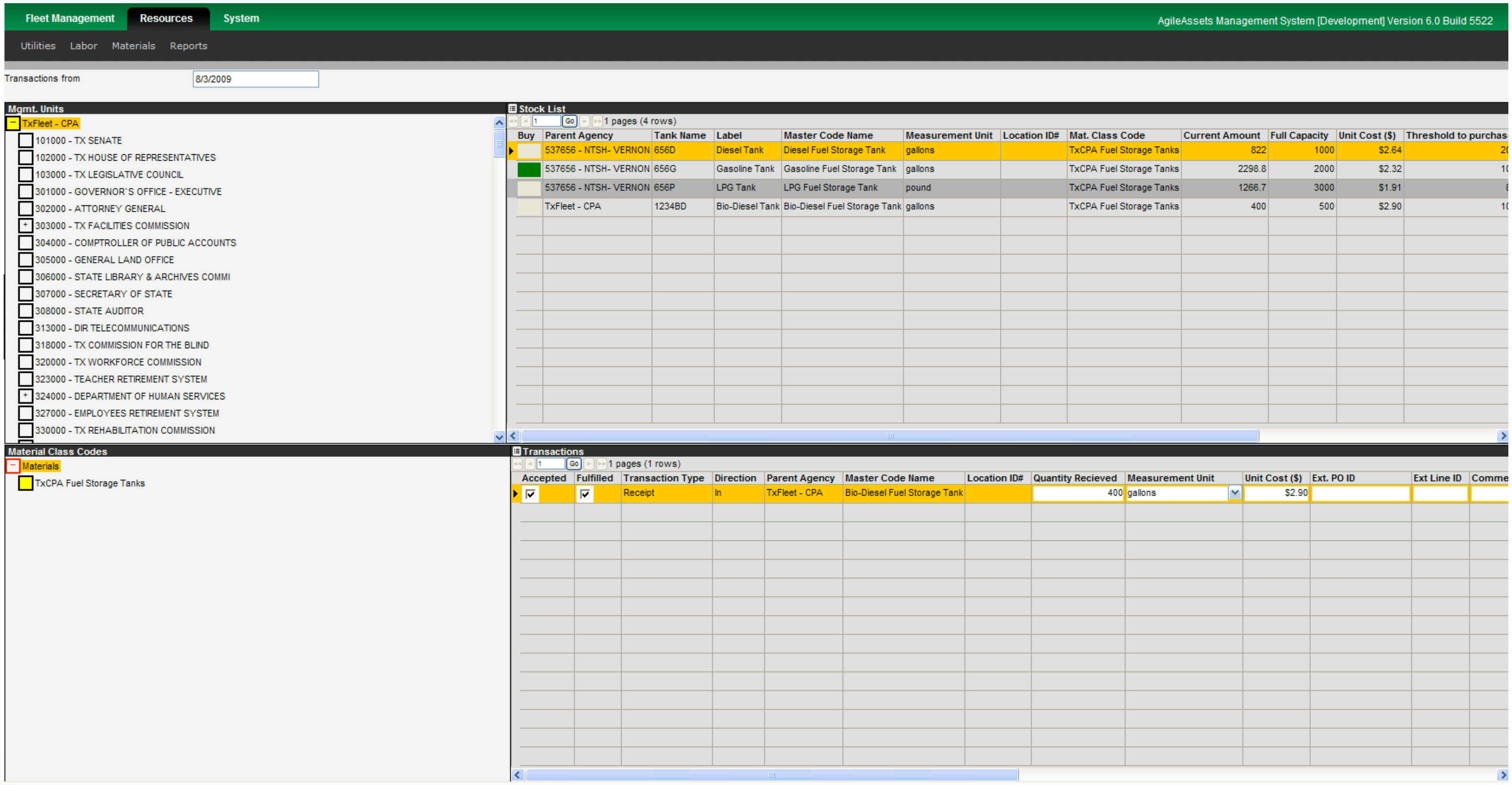
10 – Resources – Material Inventory

- Resources > Material > Inventory > Material Inventory
- Getting Started Tutorial pp. 59-63

- Exercise:
  - Review list of materials (for agency and children agencies)
  - Review the Historical Transactions for a specific stock.
  - Review the Full Quantity for your stocks.

11 – Resources – Material Management

- Allows for acquiring, receiving, transferring and correcting materials.


Fleet Management
Resources
System
AgileAssets Management System [Development] Version 6.0 Build 5522
Utilities
Labor
Materials
Reports
Go

Transactions from 8/3/2009

Mgmt. Units

- TxFleet - CPA
  - ☐ 101000 - TX SENATE
  - ☐ 102000 - TX HOUSE OF REPRESENTATIVES
  - ☐ 103000 - TX LEGISLATIVE COUNCIL
  - ☐ 301000 - GOVERNOR`S OFFICE - EXECUTIVE
  - ☐ 302000 - ATTORNEY GENERAL
  - + 303000 - TX FACILITIES COMMISSION
  - ☐ 304000 - COMPTROLLER OF PUBLIC ACCOUNTS
  - ☐ 305000 - GENERAL LAND OFFICE
  - ☐ 306000 - STATE LIBRARY & ARCHIVES COMMI
  - ☐ 307000 - SECRETARY OF STATE
  - ☐ 308000 - STATE AUDITOR
  - ☐ 313000 - DIR TELECOMMUNICATIONS
  - ☐ 318000 - TX COMMISSION FOR THE BLIND
  - ☐ 320000 - TX WORKFORCE COMMISSION
  - ☐ 323000 - TEACHER RETIREMENT SYSTEM
  - + 324000 - DEPARTMENT OF HUMAN SERVICES
  - ☐ 327000 - EMPLOYEES RETIREMENT SYSTEM
  - ☐ 330000 - TX REHABILITATION COMMISSION

Material Class Codes

- Materials
  - TxCPA Fuel Storage Tanks

Stock List

1 1 pages (4 rows)

Buy	Parent Agency	Tank Name	Label	Master Code Name	Measurement Unit	Location ID#	Mat. Class Code	Current Amount	Full Capacity	Unit Cost ($)	Threshold to purchas
	537656 - NTSH- VERNON	656D	Diesel Tank	Diesel Fuel Storage Tank	gallons		TxCPA Fuel Storage Tanks	822	1000	$2.64	20
🟩	537656 - NTSH- VERNON	656G	Gasoline Tank	Gasoline Fuel Storage Tank	gallons		TxCPA Fuel Storage Tanks	2298.8	2000	$2.32	10
	537656 - NTSH- VERNON	656P	LPG Tank	LPG Fuel Storage Tank	pound		TxCPA Fuel Storage Tanks	1266.7	3000	$1.91	8
	TxFleet - CPA	1234BD	Bio-Diesel Tank	Bio-Diesel Fuel Storage Tank	gallons		TxCPA Fuel Storage Tanks	400	500	$2.90	10

Transactions

1 1 pages (1 rows)

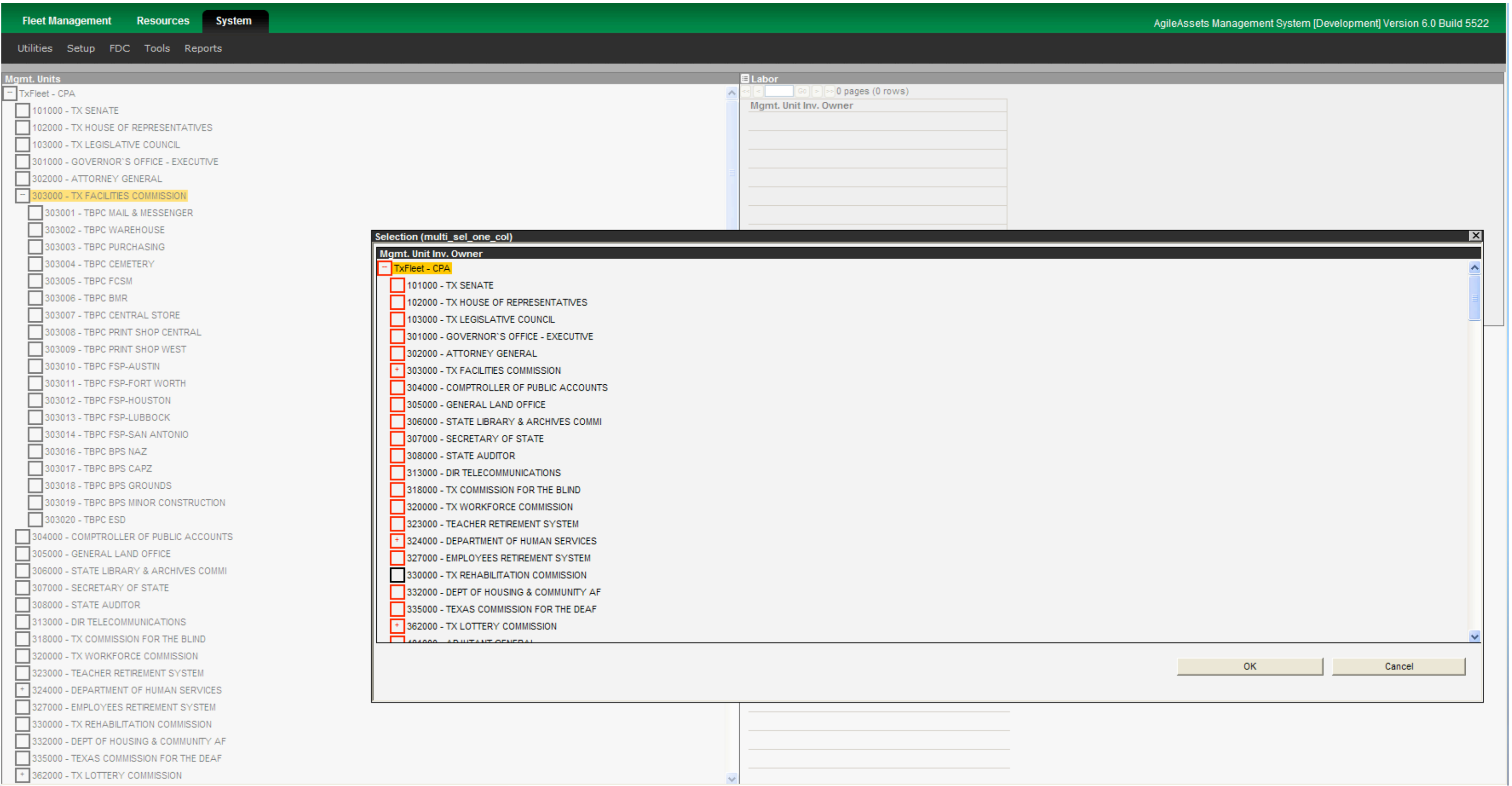
Accepted	Fulfilled	Transaction Type	Direction	Parent Agency	Master Code Name	Location ID#	Quantity Recieved	Measurement Unit	Unit Cost ($)	Ext. PO ID	Ext Line ID	Comme
☑	☑	Receipt	In	TxFleet - CPA	Bio-Diesel Fuel Storage Tank		400	gallons	$2.90			

11 – Resources – Material Management

- Resources > Material > Inventory > Material Management
- Getting Started Tutorial pp. 64-69
- Exercise:
  - Review list of materials (for your agency and other agencies)
  - Receive 2 new materials stock (for Fuel and BioDiesel). (List of Fuel Storage Tanks + Material Management + Material Inventory).
  - Receive more fuel into 3 existing stock.
  - Make a correction on 2 existing stock.
  - Withdraw material from an existing stock.
  - Review history in Material Inventory Window.

12 – Resources – Sharing

- Allows to share Labor resources between Agencies



Mgmt. Units

- TxFleet - CPA
  - ☐ 101000 - TX SENATE
  - ☐ 102000 - TX HOUSE OF REPRESENTATIVES
  - ☐ 103000 - TX LEGISLATIVE COUNCIL
  - ☐ 301000 - GOVERNOR`S OFFICE - EXECUTIVE
  - ☐ 302000 - ATTORNEY GENERAL
  - 303000 - TX FACILITIES COMMISSION
    - ☐ 303001 - TBPC MAIL & MESSENGER
    - ☐ 303002 - TBPC WAREHOUSE
    - ☐ 303003 - TBPC PURCHASING
    - ☐ 303004 - TBPC CEMETERY
    - ☐ 303005 - TBPC FCSM
    - ☐ 303006 - TBPC BMR
    - ☐ 303007 - TBPC CENTRAL STORE
    - ☐ 303008 - TBPC PRINT SHOP CENTRAL
    - ☐ 303009 - TBPC PRINT SHOP WEST
    - ☐ 303010 - TBPC FSP-AUSTIN
    - ☐ 303011 - TBPC FSP-FORT WORTH
    - ☐ 303012 - TBPC FSP-HOUSTON
    - ☐ 303013 - TBPC FSP-LUBBOCK
    - ☐ 303014 - TBPC FSP-SAN ANTONIO
    - ☐ 303016 - TBPC BPS NAZ
    - ☐ 303017 - TBPC BPS CAPZ
    - ☐ 303018 - TBPC BPS GROUNDS
    - ☐ 303019 - TBPC BPS MINOR CONSTRUCTION
    - ☐ 303020 - TBPC ESD
  - ☐ 304000 - COMPTROLLER OF PUBLIC ACCOUNTS
  - ☐ 305000 - GENERAL LAND OFFICE
  - ☐ 306000 - STATE LIBRARY & ARCHIVES COMMI
  - ☐ 307000 - SECRETARY OF STATE
  - ☐ 308000 - STATE AUDITOR
  - ☐ 313000 - DIR TELECOMMUNICATIONS
  - ☐ 318000 - TX COMMISSION FOR THE BLIND
  - ☐ 320000 - TX WORKFORCE COMMISSION
  - ☐ 323000 - TEACHER RETIREMENT SYSTEM
  - 324000 - DEPARTMENT OF HUMAN SERVICES
  - ☐ 327000 - EMPLOYEES RETIREMENT SYSTEM
  - ☐ 330000 - TX REHABILITATION COMMISSION
  - ☐ 332000 - DEPT OF HOUSING & COMMUNITY AF
  - ☐ 335000 - TEXAS COMMISSION FOR THE DEAF
  - 362000 - TX LOTTERY COMMISSION

Labor

Mgmt. Unit Inv. Owner

Selection (multi_sel_one_col)

Mgmt. Unit Inv. Owner

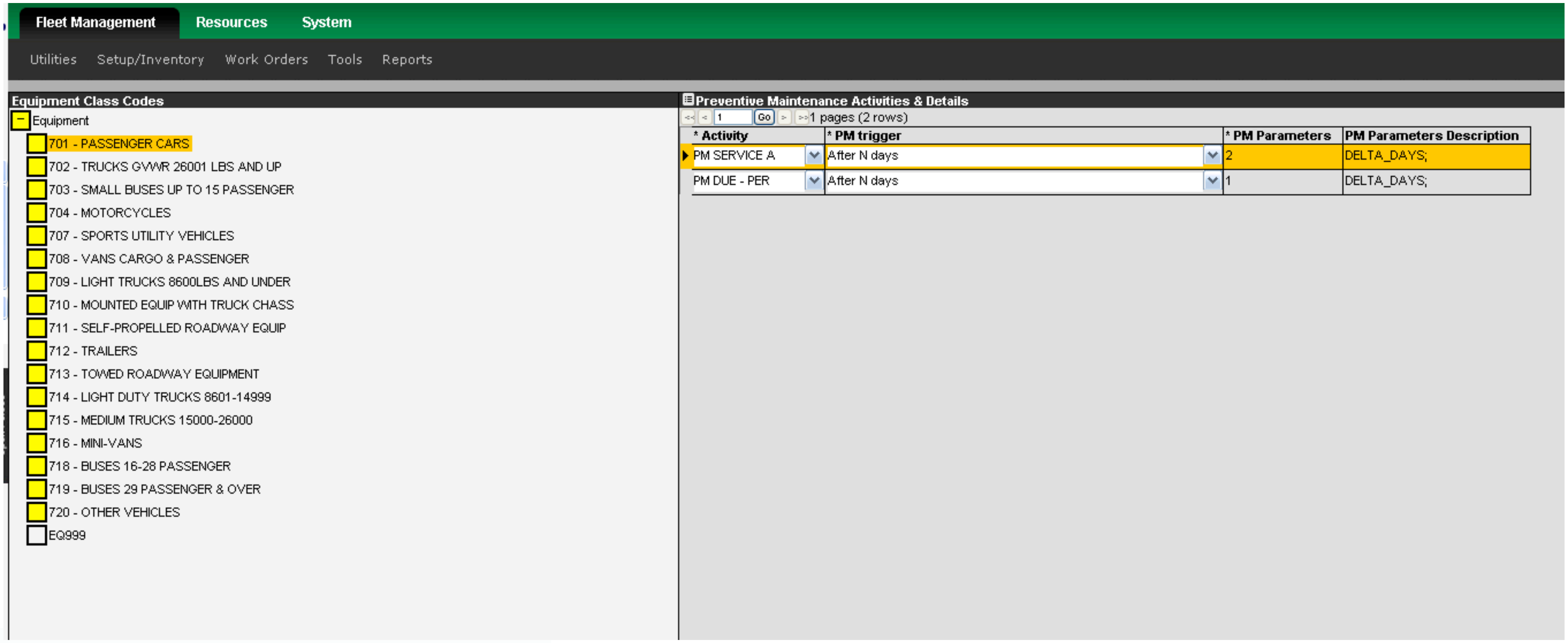
- TxFleet - CPA
  - ☐ 101000 - TX SENATE
  - ☐ 102000 - TX HOUSE OF REPRESENTATIVES
  - ☐ 103000 - TX LEGISLATIVE COUNCIL
  - ☐ 301000 - GOVERNOR`S OFFICE - EXECUTIVE
  - ☐ 302000 - ATTORNEY GENERAL
  - 303000 - TX FACILITIES COMMISSION
  - ☐ 304000 - COMPTROLLER OF PUBLIC ACCOUNTS
  - ☐ 305000 - GENERAL LAND OFFICE
  - ☐ 306000 - STATE LIBRARY & ARCHIVES COMMI
  - ☐ 307000 - SECRETARY OF STATE
  - ☐ 308000 - STATE AUDITOR
  - ☐ 313000 - DIR TELECOMMUNICATIONS
  - ☐ 318000 - TX COMMISSION FOR THE BLIND
  - ☐ 320000 - TX WORKFORCE COMMISSION
  - ☐ 323000 - TEACHER RETIREMENT SYSTEM
  - 324000 - DEPARTMENT OF HUMAN SERVICES
  - ☐ 327000 - EMPLOYEES RETIREMENT SYSTEM
  - ☐ 330000 - TX REHABILITATION COMMISSION
  - ☐ 332000 - DEPT OF HOUSING & COMMUNITY AF
  - ☐ 335000 - TEXAS COMMISSION FOR THE DEAF
  - 362000 - TX LOTTERY COMMISSION

12 – Resources – Sharing

- System > Setup > Resource Sharing
- Getting Started Tutorial pp. 14-16
- Exercise:
  - Allow your agency to use resources from another agency.

13 – PM Setup – by Vehicle Class

- Allows for defining the PM setup per Vehicle Class (activities, frequencies) – setup and maintained by CPA.


Fleet Management
Resources
System
Utilities
Setup/Inventory
Work Orders
Tools
Reports
Go
1 pages (2 rows)

Equipment Class Codes

- Equipment
  - 701 - PASSENGER CARS
  - 702 - TRUCKS GVWR 26001 LBS AND UP
  - 703 - SMALL BUSES UP TO 15 PASSENGER
  - 704 - MOTORCYCLES
  - 707 - SPORTS UTILITY VEHICLES
  - 708 - VANS CARGO & PASSENGER
  - 709 - LIGHT TRUCKS 8600LBS AND UNDER
  - 710 - MOUNTED EQUIP WITH TRUCK CHASS
  - 711 - SELF-PROPELLED ROADWAY EQUIP
  - 712 - TRAILERS
  - 713 - TOWED ROADWAY EQUIPMENT
  - 714 - LIGHT DUTY TRUCKS 8601-14999
  - 715 - MEDIUM TRUCKS 15000-26000
  - 716 - MINI-VANS
  - 718 - BUSES 16-28 PASSENGER
  - 719 - BUSES 29 PASSENGER & OVER
  - 720 - OTHER VEHICLES
  - EQ999

Preventive Maintenance Activities & Details

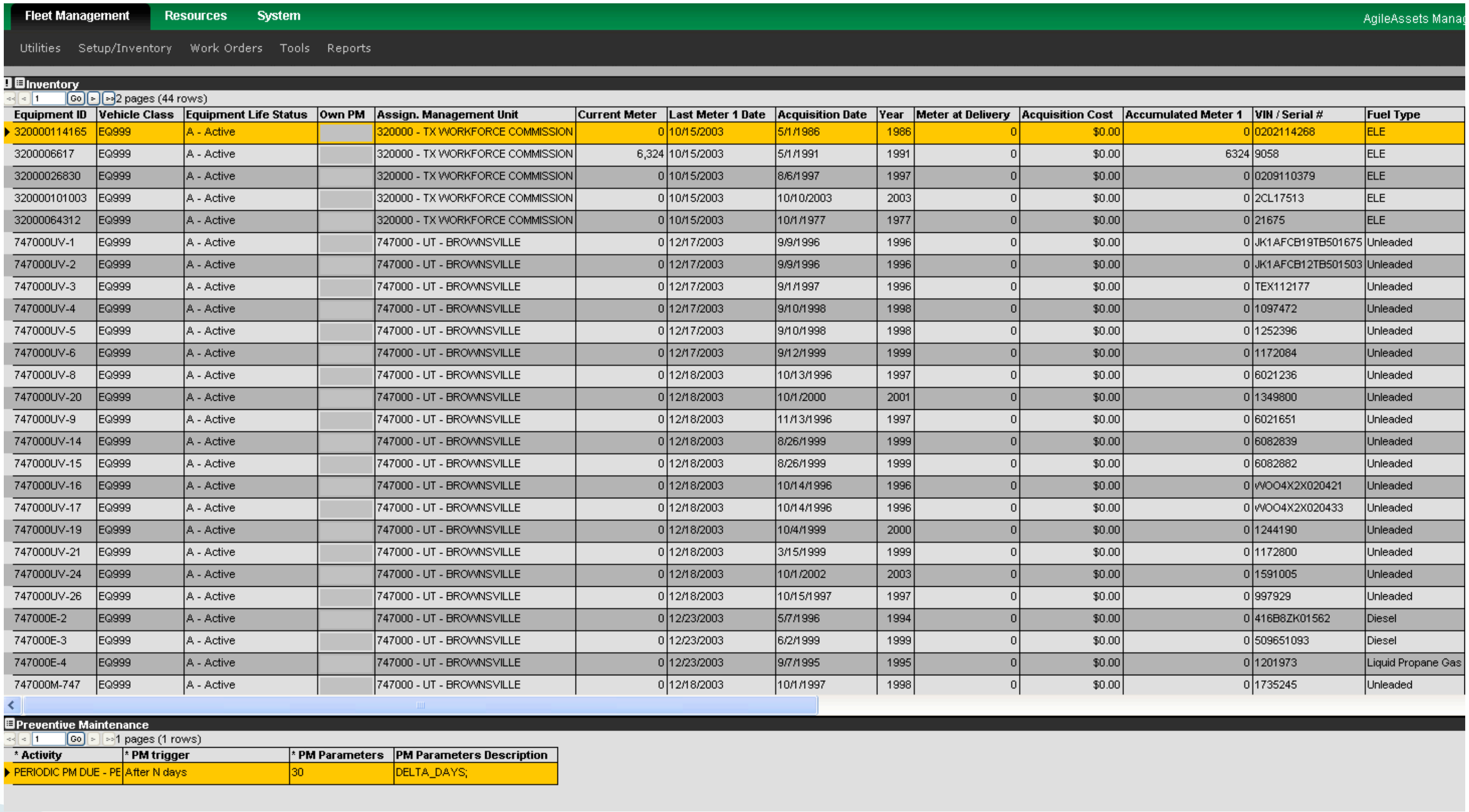
* Activity	* PM trigger	* PM Parameters	PM Parameters Description
PM SERVICE A	After N days	2	DELTA_DAYS;
PM DUE - PER	After N days	1	DELTA_DAYS;

13 – PM Setup – By Vehicle Class

- Fleet Management > Setup/Inventory > Equipment Inventory > PM by Class Code
- Getting Started Tutorial pp. 18-21
- Exercise:
  - Review list of defined PM activities and frequencies by Vehicle Class Codes.

14 – PM Setup – By Individual Vehicle

- Allows for defining the PM schedule for an individual equipment (overwrite of Vehicle Class setup).



1 2 pages (44 rows)

Equipment ID	Vehicle Class	Equipment Life Status	Own PM	Assign. Management Unit	Current Meter	Last Meter 1 Date	Acquisition Date	Year	Meter at Delivery	Acquisition Cost	Accumulated Meter 1	VIN / Serial #	Fuel Type
320000114165	EQ999	A - Active		320000 - TX WORKFORCE COMMISSION	0	10/15/2003	5/1/1986	1986	0	$0.00	0	0202114268	ELE
3200006617	EQ999	A - Active		320000 - TX WORKFORCE COMMISSION	6,324	10/15/2003	5/1/1991	1991	0	$0.00	6324	9058	ELE
32000026830	EQ999	A - Active		320000 - TX WORKFORCE COMMISSION	0	10/15/2003	8/6/1997	1997	0	$0.00	0	0209110379	ELE
320000101003	EQ999	A - Active		320000 - TX WORKFORCE COMMISSION	0	10/15/2003	10/10/2003	2003	0	$0.00	0	2CL17513	ELE
32000064312	EQ999	A - Active		320000 - TX WORKFORCE COMMISSION	0	10/15/2003	10/1/1977	1977	0	$0.00	0	21675	ELE
747000UV-1	EQ999	A - Active		747000 - UT - BROWNSVILLE	0	12/17/2003	9/9/1996	1996	0	$0.00	0	JK1AFCB19TB501675	Unleaded
747000UV-2	EQ999	A - Active		747000 - UT - BROWNSVILLE	0	12/17/2003	9/9/1996	1996	0	$0.00	0	JK1AFCB12TB501503	Unleaded
747000UV-3	EQ999	A - Active		747000 - UT - BROWNSVILLE	0	12/17/2003	9/1/1997	1996	0	$0.00	0	TEX112177	Unleaded
747000UV-4	EQ999	A - Active		747000 - UT - BROWNSVILLE	0	12/17/2003	9/10/1998	1998	0	$0.00	0	1097472	Unleaded
747000UV-5	EQ999	A - Active		747000 - UT - BROWNSVILLE	0	12/17/2003	9/10/1998	1998	0	$0.00	0	1252396	Unleaded
747000UV-6	EQ999	A - Active		747000 - UT - BROWNSVILLE	0	12/17/2003	9/12/1999	1999	0	$0.00	0	1172084	Unleaded
747000UV-8	EQ999	A - Active		747000 - UT - BROWNSVILLE	0	12/18/2003	10/13/1996	1997	0	$0.00	0	6021236	Unleaded
747000UV-20	EQ999	A - Active		747000 - UT - BROWNSVILLE	0	12/18/2003	10/1/2000	2001	0	$0.00	0	1349800	Unleaded
747000UV-9	EQ999	A - Active		747000 - UT - BROWNSVILLE	0	12/18/2003	11/13/1996	1997	0	$0.00	0	6021651	Unleaded
747000UV-14	EQ999	A - Active		747000 - UT - BROWNSVILLE	0	12/18/2003	8/26/1999	1999	0	$0.00	0	6082839	Unleaded
747000UV-15	EQ999	A - Active		747000 - UT - BROWNSVILLE	0	12/18/2003	8/26/1999	1999	0	$0.00	0	6082882	Unleaded
747000UV-16	EQ999	A - Active		747000 - UT - BROWNSVILLE	0	12/18/2003	10/14/1996	1996	0	$0.00	0	WOO4X2X020421	Unleaded
747000UV-17	EQ999	A - Active		747000 - UT - BROWNSVILLE	0	12/18/2003	10/14/1996	1996	0	$0.00	0	WOO4X2X020433	Unleaded
747000UV-19	EQ999	A - Active		747000 - UT - BROWNSVILLE	0	12/18/2003	10/4/1999	2000	0	$0.00	0	1244190	Unleaded
747000UV-21	EQ999	A - Active		747000 - UT - BROWNSVILLE	0	12/18/2003	3/15/1999	1999	0	$0.00	0	1172800	Unleaded
747000UV-24	EQ999	A - Active		747000 - UT - BROWNSVILLE	0	12/18/2003	10/1/2002	2003	0	$0.00	0	1591005	Unleaded
747000UV-26	EQ999	A - Active		747000 - UT - BROWNSVILLE	0	12/18/2003	10/15/1997	1997	0	$0.00	0	997929	Unleaded
747000E-2	EQ999	A - Active		747000 - UT - BROWNSVILLE	0	12/23/2003	5/7/1996	1994	0	$0.00	0	416B8ZK01562	Diesel
747000E-3	EQ999	A - Active		747000 - UT - BROWNSVILLE	0	12/23/2003	6/2/1999	1999	0	$0.00	0	509651093	Diesel
747000E-4	EQ999	A - Active		747000 - UT - BROWNSVILLE	0	12/23/2003	9/7/1995	1995	0	$0.00	0	1201973	Liquid Propane Gas
747000M-747	EQ999	A - Active		747000 - UT - BROWNSVILLE	0	12/18/2003	10/1/1997	1998	0	$0.00	0	1735245	Unleaded

1 1 pages (1 rows)

* Activity	* PM trigger	* PM Parameters	PM Parameters Description
PERIODIC PM DUE - PE	After N days	30	DELTA_DAYS;

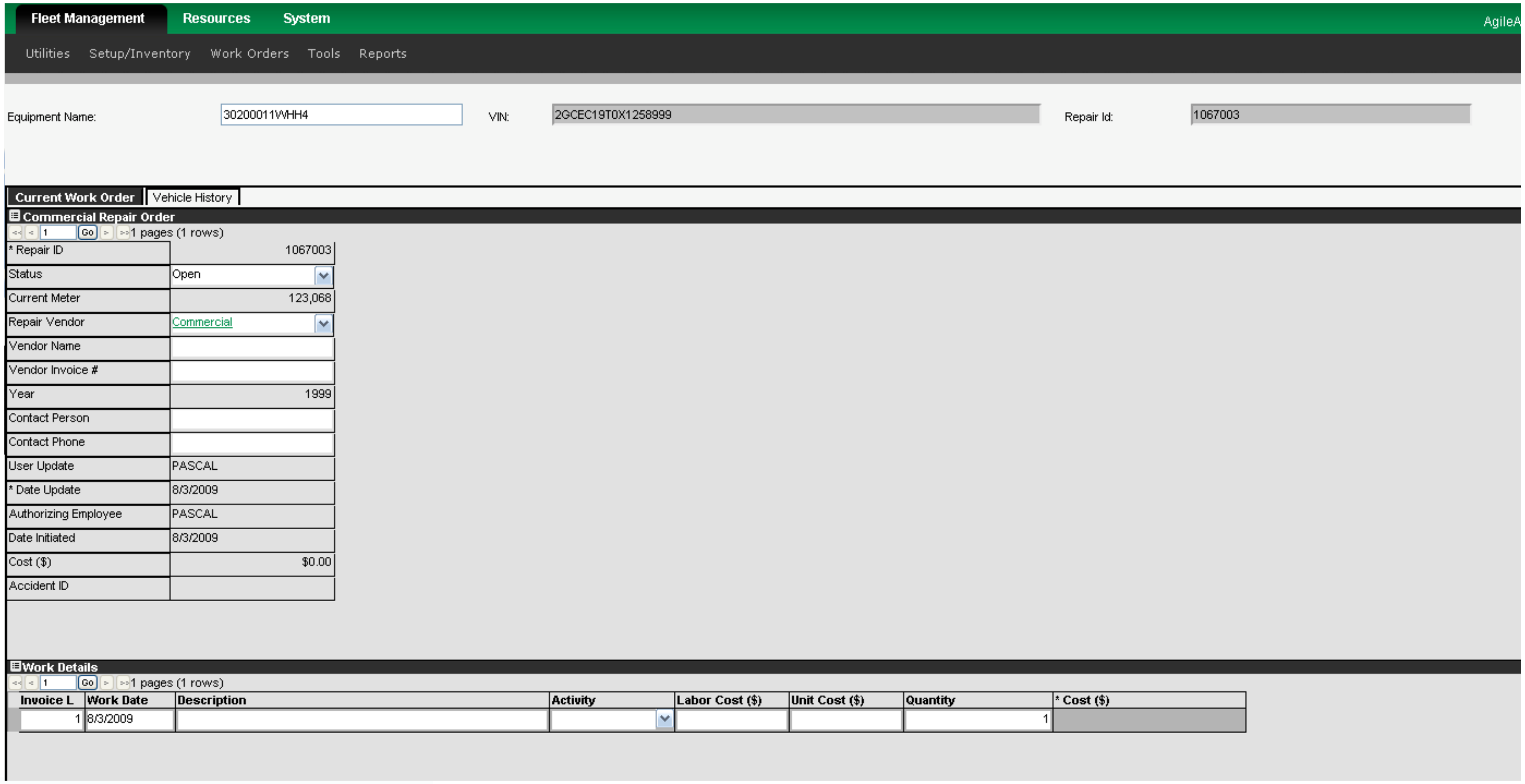
14 – PM Setup – By Individual Vehicle

- Fleet Management > Setup/Inventory > Equipment Inventory > PM by Inventory
- Getting Started Tutorial pp. 21-25

- Exercise:
  - Select a vehicle in your inventory, review the activities recommended by Vehicle Class
  - Overwrite Parent PM Setup and define it’s own schedule.
  - Repeat for 4 equipments with several activities and trigger types

15 – Repair Orders – Commercial / Inter-Agency

- Allows for Capturing Commercial Repair and Inter-Agency repair orders


Fleet Management
Resources
System
AgileA
Utilities
Setup/Inventory
Work Orders
Tools
Reports
Current Work Order
Vehicle History
Go

Equipment Name: 30200011WHH4

VIN: 2GCEC19T0X1258999

Repair Id: 1067003

Commercial Repair Order

1 pages (1 rows)

* Repair ID	1067003
Status	Open
Current Meter	123,068
Repair Vendor	Commercial
Vendor Name	
Vendor Invoice #	
Year	1999
Contact Person	
Contact Phone	
User Update	PASCAL
* Date Update	8/3/2009
Authorizing Employee	PASCAL
Date Initiated	8/3/2009
Cost ($)	$0.00
Accident ID	

Work Details

1 pages (1 rows)

Invoice L	Work Date	Description	Activity	Labor Cost ($)	Unit Cost ($)	Quantity	* Cost ($)
1	8/3/2009					1	

15 – Repair Orders – Commercial / Inter-Agency

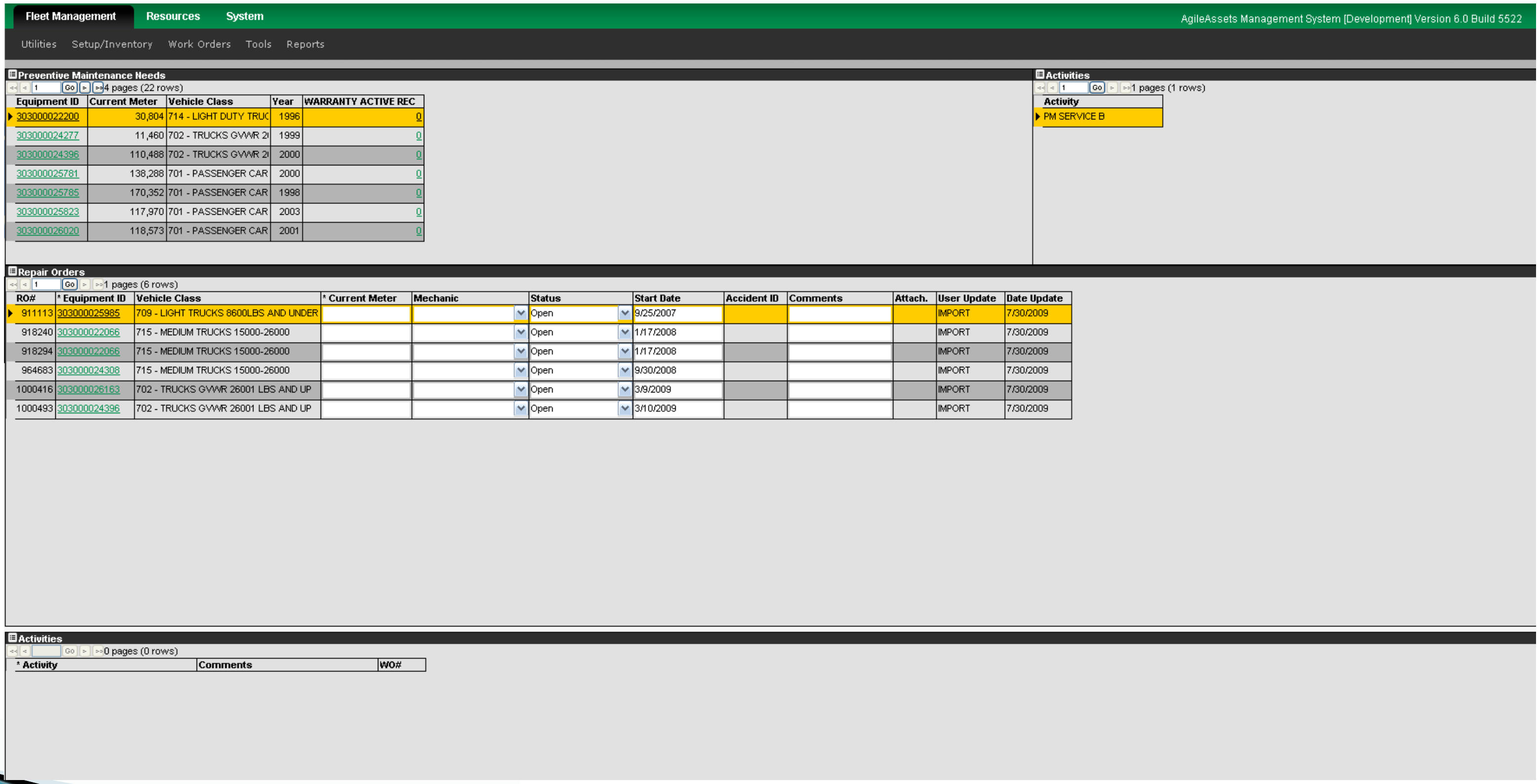
- Fleet Management > Work Orders > Commercial / Inter-Agency Work Orders > Create Work Orders
- Getting Started Tutorial pp. 29-30

- Fleet Management > Work Orders > Commercial / Inter-Agency Work Orders > Complete Work Orders
- Getting Started Tutorial pp. 40-43

- Exercise:
  - Create 2 Commercial Repair Orders on one equipment
  - Create 2 Commercial Repair Orders on different equipments
  - Create 2 Inter-agency Repair Orders
  - Complete the 4 created repair Orders

16 – Repair Orders – PM or In-house - Create

- Allows for creating PM repair orders or normal repair order using in-house resources (and commercial if necessary)


Fleet Management
Resources
System
AgileAssets Management System [Development] Version 6.0 Build 5522
Utilities
Setup/Inventory
Work Orders
Tools
Reports
Go

Preventive Maintenance Needs

1 4 pages (22 rows)

Equipment ID	Current Meter	Vehicle Class	Year	WARRANTY ACTIVE REC
303000022200	30,804	714 - LIGHT DUTY TRUC	1996	0
303000024277	11,460	702 - TRUCKS GVWR 2	1999	0
303000024396	110,488	702 - TRUCKS GVWR 2	2000	0
303000025781	138,288	701 - PASSENGER CAR	2000	0
303000025785	170,352	701 - PASSENGER CAR	1998	0
303000025823	117,970	701 - PASSENGER CAR	2003	0
303000026020	118,573	701 - PASSENGER CAR	2001	0

Activities

1 1 pages (1 rows)

Activity
PM SERVICE B

Repair Orders

1 1 pages (6 rows)

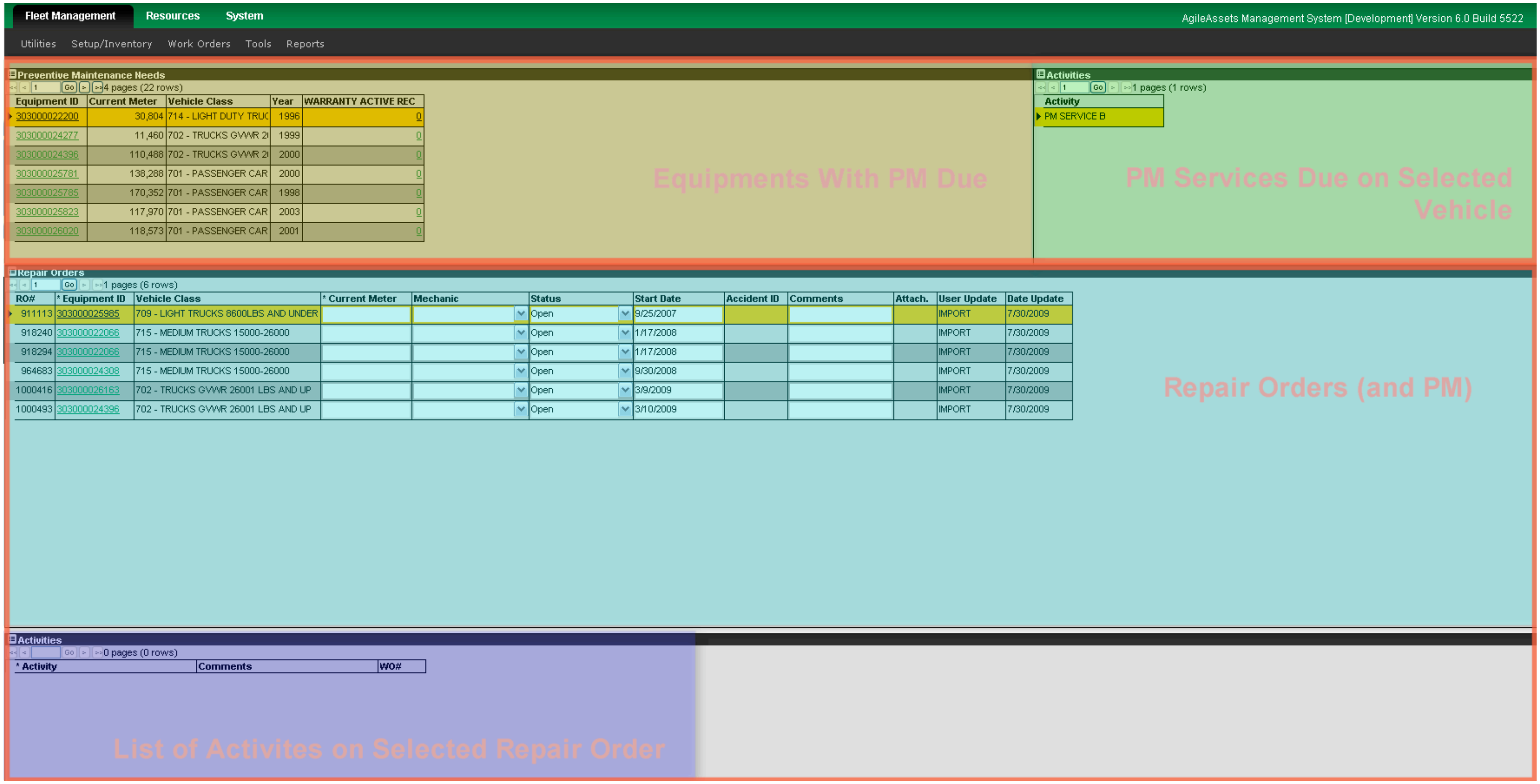
RO#	* Equipment ID	Vehicle Class	* Current Meter	Mechanic	Status	Start Date	Accident ID	Comments	Attach.	User Update	Date Update
911113	303000025985	709 - LIGHT TRUCKS 8600LBS AND UNDER			Open	9/25/2007				IMPORT	7/30/2009
918240	303000022066	715 - MEDIUM TRUCKS 15000-26000			Open	1/17/2008				IMPORT	7/30/2009
918294	303000022066	715 - MEDIUM TRUCKS 15000-26000			Open	1/17/2008				IMPORT	7/30/2009
964683	303000024308	715 - MEDIUM TRUCKS 15000-26000			Open	9/30/2008				IMPORT	7/30/2009
1000416	303000026163	702 - TRUCKS GVWR 26001 LBS AND UP			Open	3/9/2009				IMPORT	7/30/2009
1000493	303000024396	702 - TRUCKS GVWR 26001 LBS AND UP			Open	3/10/2009				IMPORT	7/30/2009

Activities

0 pages (0 rows)

* Activity	Comments	WO#

16 – Repair Orders – PM or In-house - Create


Fleet Management
Resources
System
AgileAssets Management System [Development] Version 6.0 Build 5522
Utilities
Setup/Inventory
Work Orders
Tools
Reports
Go
Go
Go

Equipments With PM Due

PM Services Due on Selected Vehicle

Repair Orders (and PM)

List of Activites on Selected Repair Order

Preventive Maintenance Needs

1 4 pages (22 rows)

Equipment ID	Current Meter	Vehicle Class	Year	WARRANTY ACTIVE REC
303000022200	30,804	714 - LIGHT DUTY TRUC	1996	0
303000024277	11,460	702 - TRUCKS GVWR 2	1999	0
303000024396	110,488	702 - TRUCKS GVWR 2	2000	0
303000025781	138,288	701 - PASSENGER CAR	2000	0
303000025785	170,352	701 - PASSENGER CAR	1998	0
303000025823	117,970	701 - PASSENGER CAR	2003	0
303000026020	118,573	701 - PASSENGER CAR	2001	0

Activities

1 1 pages (1 rows)

Activity
PM SERVICE B

Repair Orders

1 1 pages (6 rows)

RO#	* Equipment ID	Vehicle Class	* Current Meter	Mechanic	Status	Start Date	Accident ID	Comments	Attach.	User Update	Date Update
911113	303000025985	709 - LIGHT TRUCKS 8600LBS AND UNDER			Open	9/25/2007				IMPORT	7/30/2009
918240	303000022066	715 - MEDIUM TRUCKS 15000-26000			Open	1/17/2008				IMPORT	7/30/2009
918294	303000022066	715 - MEDIUM TRUCKS 15000-26000			Open	1/17/2008				IMPORT	7/30/2009
964683	303000024308	715 - MEDIUM TRUCKS 15000-26000			Open	9/30/2008				IMPORT	7/30/2009
1000416	303000026163	702 - TRUCKS GVWR 26001 LBS AND UP			Open	3/9/2009				IMPORT	7/30/2009
1000493	303000024396	702 - TRUCKS GVWR 26001 LBS AND UP			Open	3/10/2009				IMPORT	7/30/2009

Activities

0 pages (0 rows)

* Activity	Comments	WO#

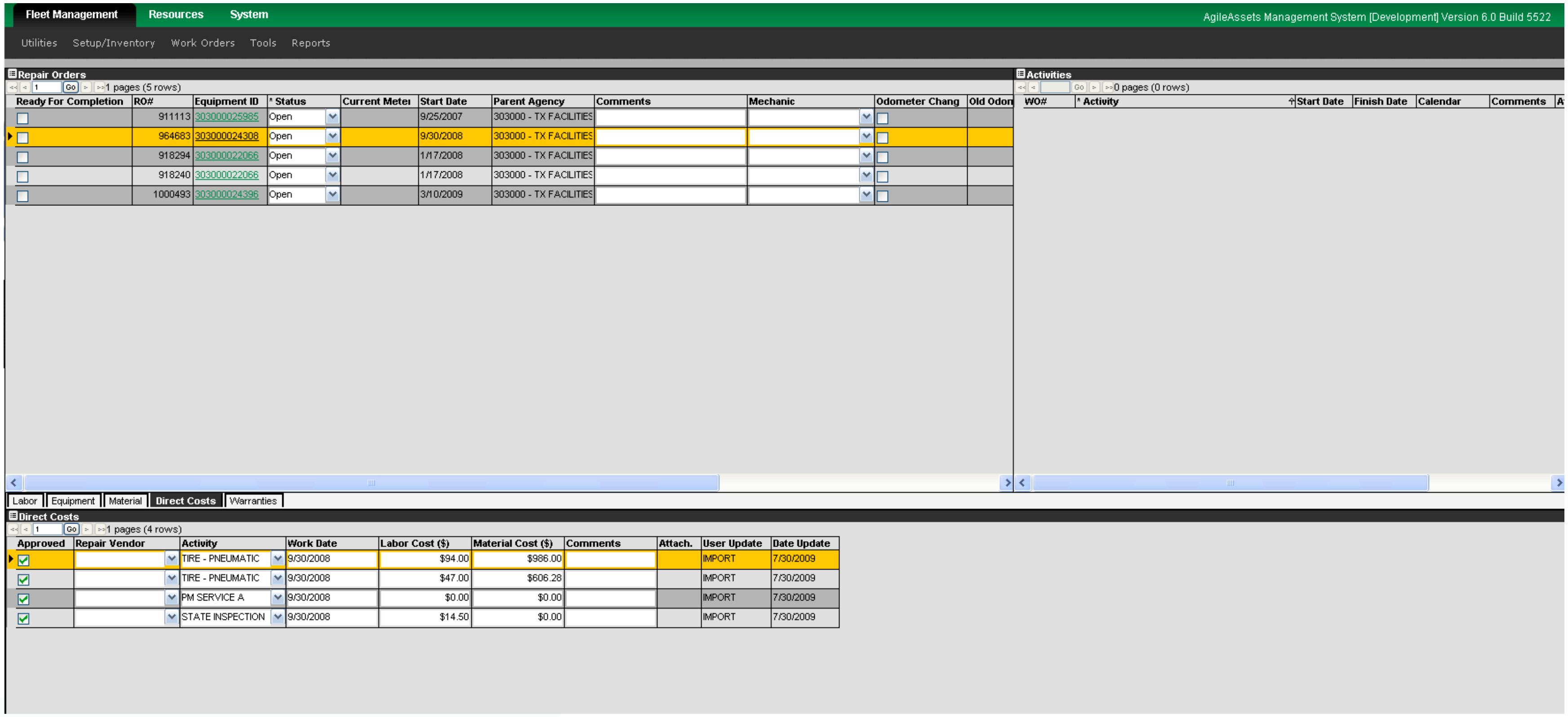
16 – Repair Orders – In-house and PM - Create

- Fleet Management > Work Orders > In-house Work Orders > Create Work Orders
- Getting Started Tutorial pp. 26-29

- Exercise:
  - Create 2 repair order for vehicles with PM due
  - Create 2 normal orders on 2 vehicles (with multiple activities)

17 – Repair Orders –In-house - Progress

- Allows for capturing activity details on PM repair orders or normal repair order using in-house resources (and commercial if necessary)


Fleet Management
Resources
System
AgileAssets Management System [Development] Version 6.0 Build 5522
Utilities
Setup/Inventory
Work Orders
Tools
Reports
Go
Labor
Equipment
Material
Direct Costs
Warranties

Repair Orders

1 pages (5 rows)

Ready For Completion	RO#	Equipment ID	* Status	Current Meter	Start Date	Parent Agency	Comments	Mechanic	Odometer Chang	Old Odon
☐	911113	303000025985	Open		9/25/2007	303000 - TX FACILITIES			☐	
☐	964683	303000024308	Open		9/30/2008	303000 - TX FACILITIES			☐	
☐	918294	303000022066	Open		1/17/2008	303000 - TX FACILITIES			☐	
☐	918240	303000022066	Open		1/17/2008	303000 - TX FACILITIES			☐	
☐	1000493	303000024396	Open		3/10/2009	303000 - TX FACILITIES			☐	

Activities

0 pages (0 rows)

WO#	* Activity	Start Date	Finish Date	Calendar	Comments	A

Direct Costs

1 pages (4 rows)

Approved	Repair Vendor	Activity	Work Date	Labor Cost ($)	Material Cost ($)	Comments	Attach.	User Update	Date Update
☑		TIRE - PNEUMATIC	9/30/2008	$94.00	$986.00			IMPORT	7/30/2009
☑		TIRE - PNEUMATIC	9/30/2008	$47.00	$606.28			IMPORT	7/30/2009
☑		PM SERVICE A	9/30/2008	$0.00	$0.00			IMPORT	7/30/2009
☑		STATE INSPECTION	9/30/2008	$14.50	$0.00			IMPORT	7/30/2009

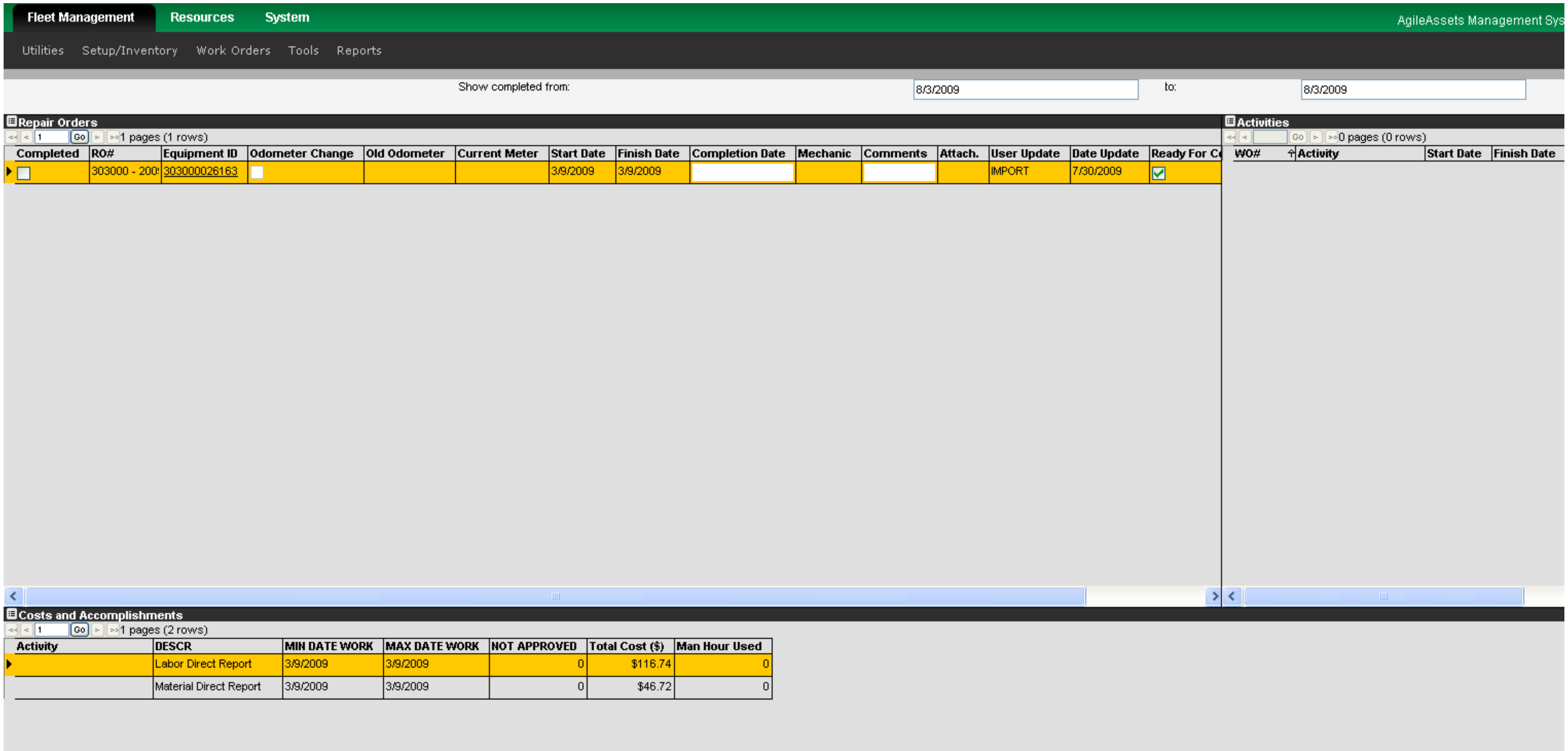
17 – Repair Orders – In-house - Progress

- Fleet Management > Work Orders > In-house Work Orders > Work Orders Progress
- Getting Started Tutorial pp. 31-36

- Exercise:
  - Capture activity details on the Work Orders created previously in the Direct Costs Tab
  - If you have in-house labor resources, capture in-house labor utilization on at least 1 work order.
  - Approve work orders daycards
  - Make the work orders ready for completion

18 – Repair Orders –In-house - Completion

- Allows for completing PM repair orders or normal repair order using in-house resources



Fleet Management
Resources
System
AgileAssets Management Sys
Utilities
Setup/Inventory
Work Orders
Tools
Reports

Show completed from: 8/3/2009 to: 8/3/2009

Repair Orders

1 pages (1 rows)

Completed	RO#	Equipment ID	Odometer Change	Old Odometer	Current Meter	Start Date	Finish Date	Completion Date	Mechanic	Comments	Attach.	User Update	Date Update	Ready For C
☐	303000 - 200	303000026163	☐			3/9/2009	3/9/2009					IMPORT	7/30/2009	☑

Activities

0 pages (0 rows)

WO#	Activity	Start Date	Finish Date

Costs and Accomplishments

1 pages (2 rows)

Activity	DESCR	MIN DATE WORK	MAX DATE WORK	NOT APPROVED	Total Cost ($)	Man Hour Used
	Labor Direct Report	3/9/2009	3/9/2009	0	$116.74	0
	Material Direct Report	3/9/2009	3/9/2009	0	$46.72	0

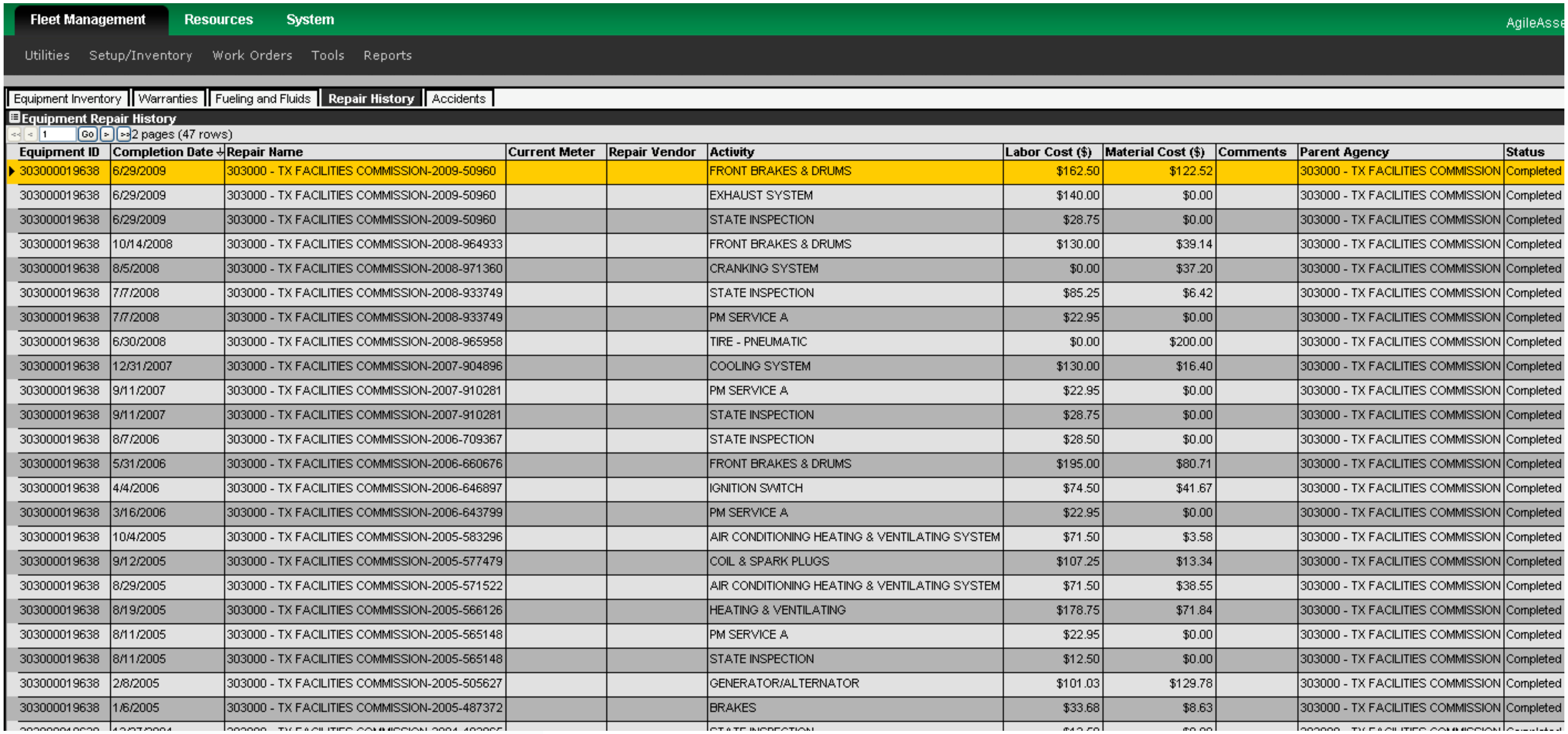
18 – Repair Orders – In-house - Completion

- Fleet Management > Work Orders > In-house Work Orders > Complete Work Orders
- Getting Started Tutorial pp. 37-40

- Exercise:
  - Identify the work orders created previously
  - Review the associated costs
  - Complete the work orders

19 – Repair History

- Allows for reviewing at any time the Repair History for a selected vehicle



Equipment Repair History

1 2 pages (47 rows)

Equipment ID	Completion Date	Repair Name	Current Meter	Repair Vendor	Activity	Labor Cost ($)	Material Cost ($)	Comments	Parent Agency	Status
303000019638	6/29/2009	303000 - TX FACILITIES COMMISSION-2009-50960			FRONT BRAKES & DRUMS	$162.50	$122.52		303000 - TX FACILITIES COMMISSION	Completed
303000019638	6/29/2009	303000 - TX FACILITIES COMMISSION-2009-50960			EXHAUST SYSTEM	$140.00	$0.00		303000 - TX FACILITIES COMMISSION	Completed
303000019638	6/29/2009	303000 - TX FACILITIES COMMISSION-2009-50960			STATE INSPECTION	$28.75	$0.00		303000 - TX FACILITIES COMMISSION	Completed
303000019638	10/14/2008	303000 - TX FACILITIES COMMISSION-2008-964933			FRONT BRAKES & DRUMS	$130.00	$39.14		303000 - TX FACILITIES COMMISSION	Completed
303000019638	8/5/2008	303000 - TX FACILITIES COMMISSION-2008-971360			CRANKING SYSTEM	$0.00	$37.20		303000 - TX FACILITIES COMMISSION	Completed
303000019638	7/7/2008	303000 - TX FACILITIES COMMISSION-2008-933749			STATE INSPECTION	$85.25	$6.42		303000 - TX FACILITIES COMMISSION	Completed
303000019638	7/7/2008	303000 - TX FACILITIES COMMISSION-2008-933749			PM SERVICE A	$22.95	$0.00		303000 - TX FACILITIES COMMISSION	Completed
303000019638	6/30/2008	303000 - TX FACILITIES COMMISSION-2008-965958			TIRE - PNEUMATIC	$0.00	$200.00		303000 - TX FACILITIES COMMISSION	Completed
303000019638	12/31/2007	303000 - TX FACILITIES COMMISSION-2007-904896			COOLING SYSTEM	$130.00	$16.40		303000 - TX FACILITIES COMMISSION	Completed
303000019638	9/11/2007	303000 - TX FACILITIES COMMISSION-2007-910281			PM SERVICE A	$22.95	$0.00		303000 - TX FACILITIES COMMISSION	Completed
303000019638	9/11/2007	303000 - TX FACILITIES COMMISSION-2007-910281			STATE INSPECTION	$28.75	$0.00		303000 - TX FACILITIES COMMISSION	Completed
303000019638	8/7/2006	303000 - TX FACILITIES COMMISSION-2006-709367			STATE INSPECTION	$28.50	$0.00		303000 - TX FACILITIES COMMISSION	Completed
303000019638	5/31/2006	303000 - TX FACILITIES COMMISSION-2006-660676			FRONT BRAKES & DRUMS	$195.00	$80.71		303000 - TX FACILITIES COMMISSION	Completed
303000019638	4/4/2006	303000 - TX FACILITIES COMMISSION-2006-646897			IGNITION SWITCH	$74.50	$41.67		303000 - TX FACILITIES COMMISSION	Completed
303000019638	3/16/2006	303000 - TX FACILITIES COMMISSION-2006-643799			PM SERVICE A	$22.95	$0.00		303000 - TX FACILITIES COMMISSION	Completed
303000019638	10/4/2005	303000 - TX FACILITIES COMMISSION-2005-583296			AIR CONDITIONING HEATING & VENTILATING SYSTEM	$71.50	$3.58		303000 - TX FACILITIES COMMISSION	Completed
303000019638	9/12/2005	303000 - TX FACILITIES COMMISSION-2005-577479			COIL & SPARK PLUGS	$107.25	$13.34		303000 - TX FACILITIES COMMISSION	Completed
303000019638	8/29/2005	303000 - TX FACILITIES COMMISSION-2005-571522			AIR CONDITIONING HEATING & VENTILATING SYSTEM	$71.50	$38.55		303000 - TX FACILITIES COMMISSION	Completed
303000019638	8/19/2005	303000 - TX FACILITIES COMMISSION-2005-566126			HEATING & VENTILATING	$178.75	$71.84		303000 - TX FACILITIES COMMISSION	Completed
303000019638	8/11/2005	303000 - TX FACILITIES COMMISSION-2005-565148			PM SERVICE A	$22.95	$0.00		303000 - TX FACILITIES COMMISSION	Completed
303000019638	8/11/2005	303000 - TX FACILITIES COMMISSION-2005-565148			STATE INSPECTION	$12.50	$0.00		303000 - TX FACILITIES COMMISSION	Completed
303000019638	2/8/2005	303000 - TX FACILITIES COMMISSION-2005-505627			GENERATOR/ALTERNATOR	$101.03	$129.78		303000 - TX FACILITIES COMMISSION	Completed
303000019638	1/6/2005	303000 - TX FACILITIES COMMISSION-2005-487372			BRAKES	$33.68	$8.63		303000 - TX FACILITIES COMMISSION	Completed

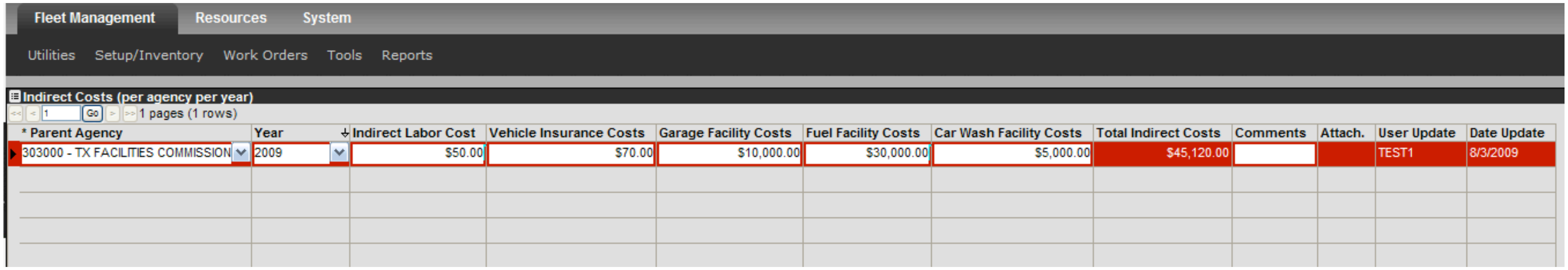
19 – Repair History

- Fleet Management > Setup/Inventory > Equipment Inventory > Equipment Inventory
- Getting Started Tutorial pp. 49
- Fleet Management > Work Orders > Commercial / Inter-agency Work Orders > Create Work Order
- Fleet Management > Work Orders > In-house Work Orders > Create Work Order
- Fleet Management > Work Orders > In-house Work Orders > Work Order Progress
- Fleet Management > Work Orders > In-house Work Orders > Complete Work Order
- Getting Started Tutorial pp. 26-43

- Exercise:
  - Identify the equipment(s)
  - Use the tab(s) or the hot link to review the repair history

20 – Indirect Costs

- Allows for capturing the annual indirect costs an agency will accrue.


Fleet Management
Resources
System
Utilities
Setup/Inventory
Work Orders
Tools
Reports
Go

Indirect Costs (per agency per year)

1 pages (1 rows)

* Parent Agency	Year	Indirect Labor Cost	Vehicle Insurance Costs	Garage Facility Costs	Fuel Facility Costs	Car Wash Facility Costs	Total Indirect Costs	Comments	Attach.	User Update	Date Update
303000 - TX FACILITIES COMMISSION	2009	$50.00	$70.00	$10,000.00	$30,000.00	$5,000.00	$45,120.00			TEST1	8/3/2009

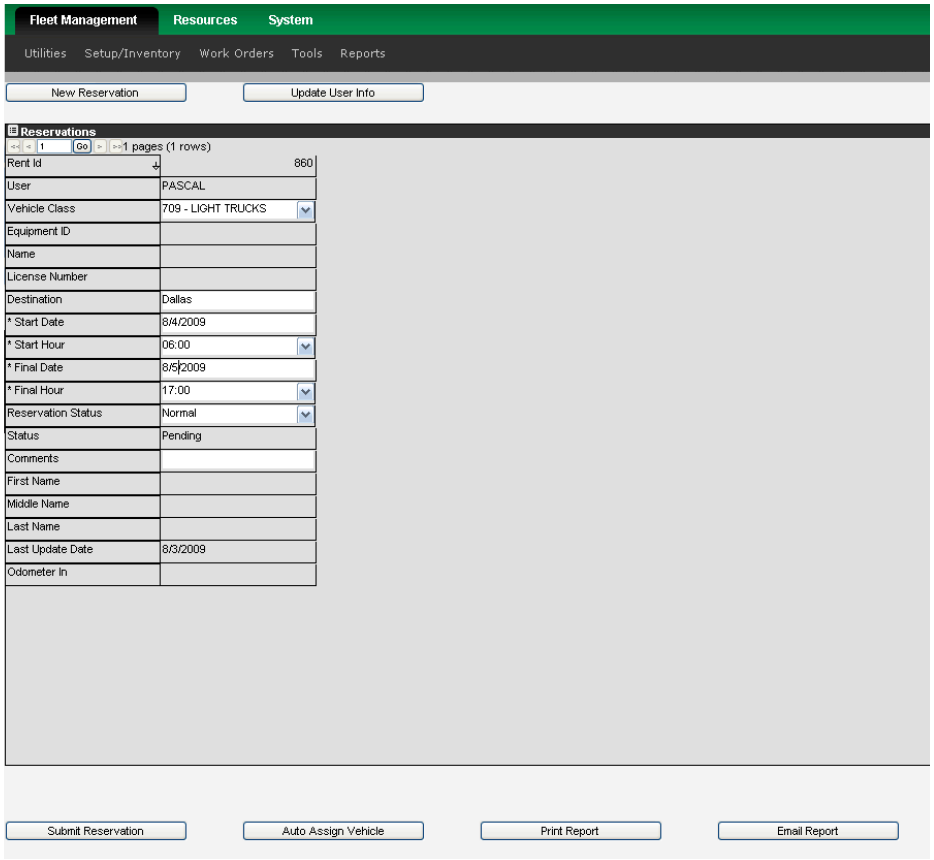
20 – Indirect Costs

- Fleet Management > Tools > Indirect Costs (per agency/year)
- Getting Started Tutorial pp. 82

- Exercise:
  - Enter your agency indirect costs for 2007 and 2008

21 – Motorpool User Reservation

- Allows for reserving MotorPool vehicles


Fleet Management
Resources
System
Utilities
Setup/Inventory
Work Orders
Tools
Reports
New Reservation
Update User Info
Reservations
1 Go 1 pages (1 rows)
Submit Reservation
Auto Assign Vehicle
Print Report
Email Report

Rent Id	860
User	PASCAL
Vehicle Class	709 - LIGHT TRUCKS
Equipment ID	
Name	
License Number	
Destination	Dallas
* Start Date	8/4/2009
* Start Hour	06:00
* Final Date	8/5/2009
* Final Hour	17:00
Reservation Status	Normal
Status	Pending
Comments	
First Name	
Middle Name	
Last Name	
Last Update Date	8/3/2009
Odometer In	

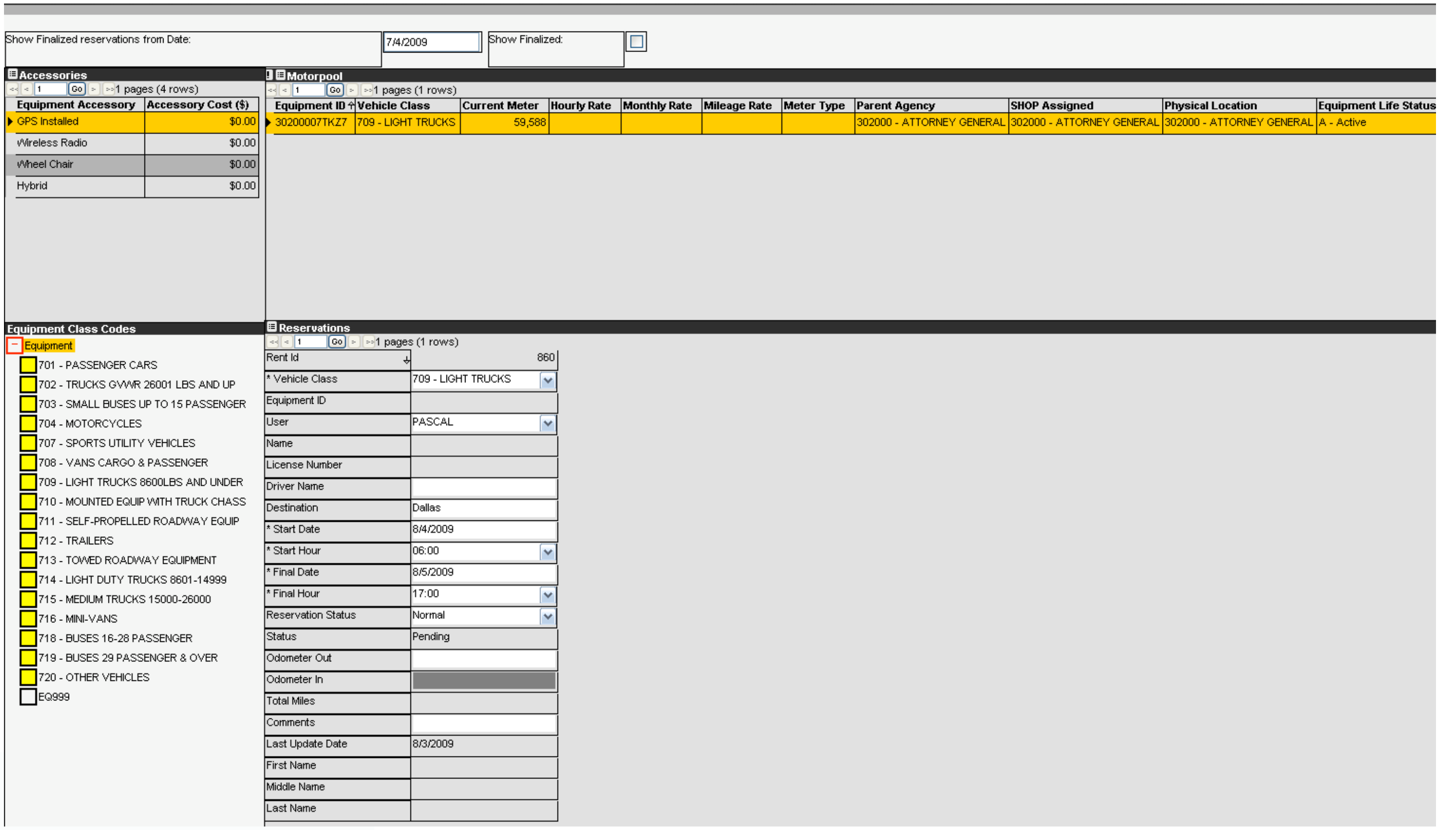
21 – Motorpool user Reservations

- Fleet Management > Tools > Motorpool User Reservations
- Getting Started Tutorial pp. 73-76

- Exercise:
  - Make several vehicles available in the motorpool reservation system
  - Create 2 motorpool reservations for different vehicle class codes

22 – Motorpool Dispatch

- Allows for reviewing/modifying all motorpool reservations, reassigning vehicle, view equipment availability



Show Finalized reservations from Date: 7/4/2009 Show Finalized: ☐

Accessories

1 pages (4 rows)

Equipment Accessory	Accessory Cost ($)
GPS Installed	$0.00
Wireless Radio	$0.00
Wheel Chair	$0.00
Hybrid	$0.00

Motorpool

1 pages (1 rows)

Equipment ID	Vehicle Class	Current Meter	Hourly Rate	Monthly Rate	Mileage Rate	Meter Type	Parent Agency	SHOP Assigned	Physical Location	Equipment Life Status
30200007TKZ7	709 - LIGHT TRUCKS	59,588					302000 - ATTORNEY GENERAL	302000 - ATTORNEY GENERAL	302000 - ATTORNEY GENERAL	A - Active

Equipment Class Codes

- Equipment
  - 🟨 701 - PASSENGER CARS
  - 🟨 702 - TRUCKS GVWR 26001 LBS AND UP
  - 🟨 703 - SMALL BUSES UP TO 15 PASSENGER
  - 🟨 704 - MOTORCYCLES
  - 🟨 707 - SPORTS UTILITY VEHICLES
  - 🟨 708 - VANS CARGO & PASSENGER
  - 🟨 709 - LIGHT TRUCKS 8600LBS AND UNDER
  - 🟨 710 - MOUNTED EQUIP WITH TRUCK CHASS
  - 🟨 711 - SELF-PROPELLED ROADWAY EQUIP
  - 🟨 712 - TRAILERS
  - 🟨 713 - TOWED ROADWAY EQUIPMENT
  - 🟨 714 - LIGHT DUTY TRUCKS 8601-14999
  - 🟨 715 - MEDIUM TRUCKS 15000-26000
  - 🟨 716 - MINI-VANS
  - 🟨 718 - BUSES 16-28 PASSENGER
  - 🟨 719 - BUSES 29 PASSENGER & OVER
  - 🟨 720 - OTHER VEHICLES
  - ☐ EQ999

Reservations

1 pages (1 rows)

Rent Id	860
* Vehicle Class	709 - LIGHT TRUCKS
Equipment ID	
User	PASCAL
Name	
License Number	
Driver Name	
Destination	Dallas
* Start Date	8/4/2009
* Start Hour	06:00
* Final Date	8/5/2009
* Final Hour	17:00
Reservation Status	Normal
Status	Pending
Odometer Out	
Odometer In	
Total Miles	
Comments	
Last Update Date	8/3/2009
First Name	
Middle Name	
Last Name	

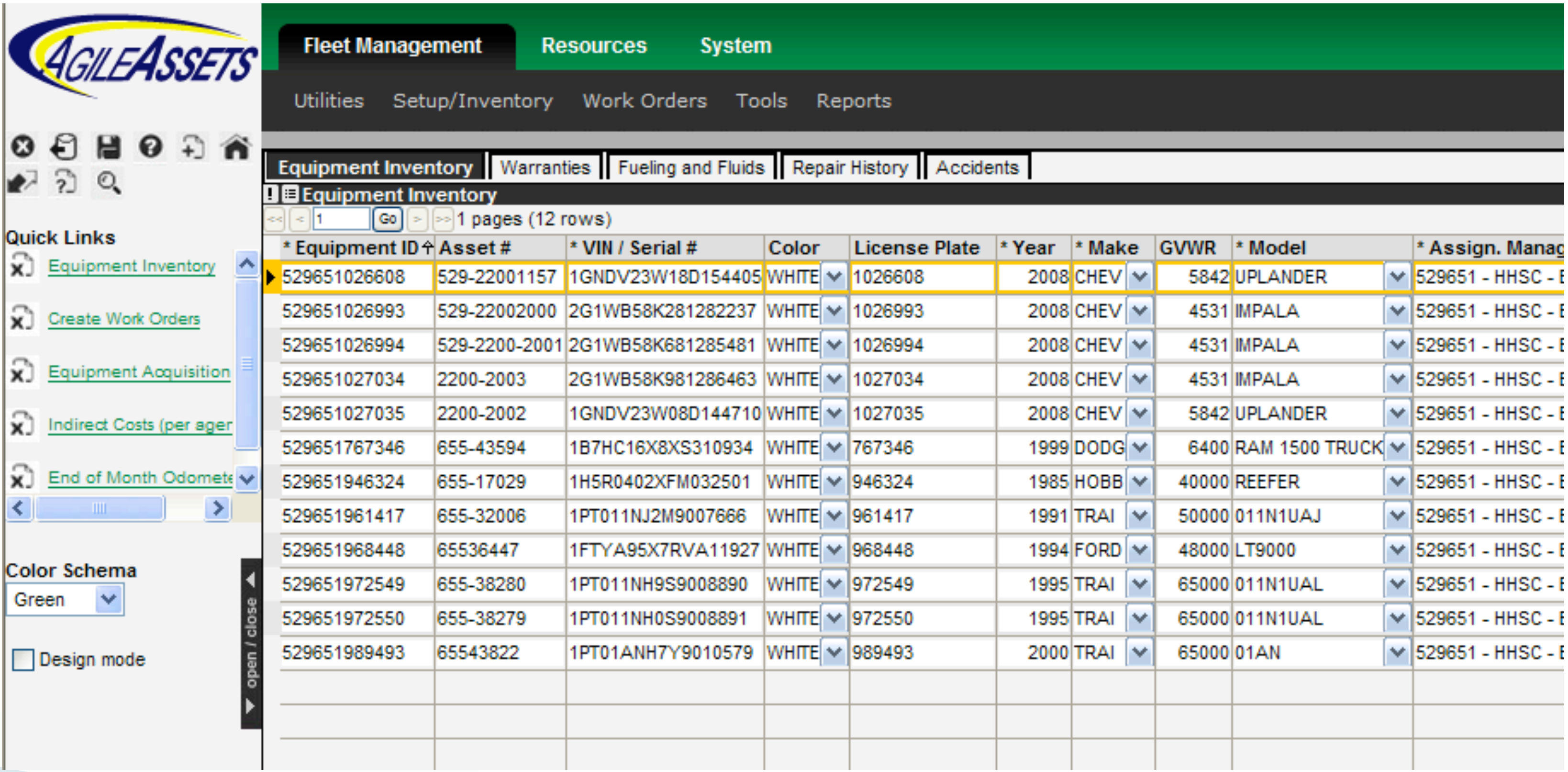
22 – Motorpool Dispatch

- Fleet Management > Tools > Motorpool Dispatch
- Getting Started Tutorial pp. 77-81

- Exercise:
  - Review existing reservation
  - Assign different vehicle to an existing reservation
  - Create new reservation

23 – Equipment Disposal

- Allows for disposing of a vehicle by entering the disposal information and changing the Equipment Life Status.


AGILEASSETS
Fleet Management
Resources
System
Utilities
Setup/Inventory
Work Orders
Tools
Reports
Quick Links
Equipment Inventory
Create Work Orders
Equipment Acquisition
Indirect Costs (per ager
End of Month Odomete
Color Schema
Green
☐ Design mode
open / close
Equipment Inventory
Warranties
Fueling and Fluids
Repair History
Accidents
Equipment Inventory
1
Go
1 pages (12 rows)

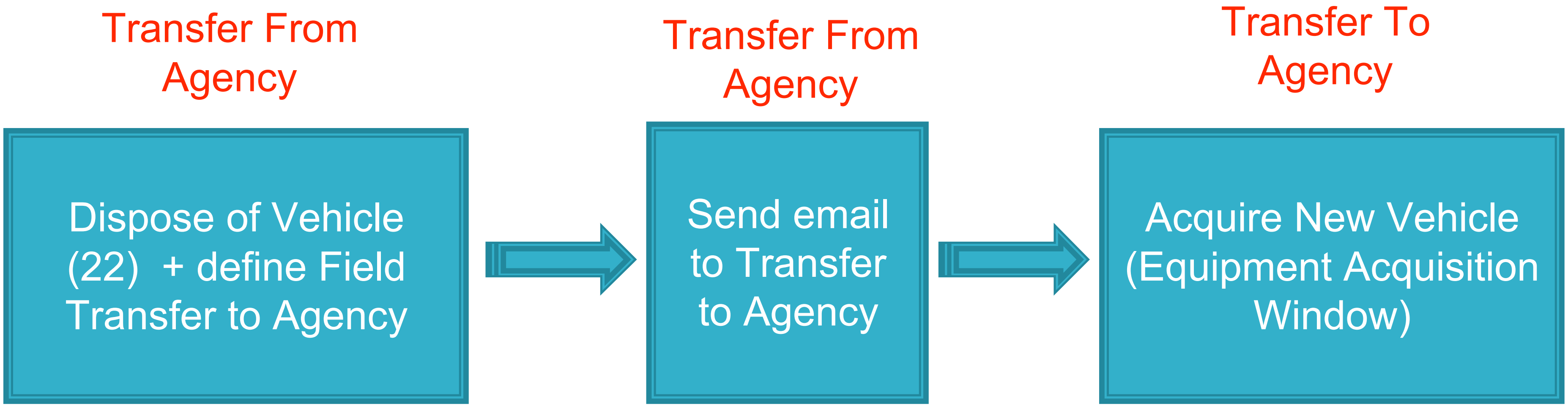
* Equipment ID	Asset #	* VIN / Serial #	Color	License Plate	* Year	* Make	GVWR	* Model	* Assign. Manag
529651026608	529-22001157	1GNDV23W18D154405	WHITE	1026608	2008	CHEV	5842	UPLANDER	529651 - HHSC -
529651026993	529-22002000	2G1WB58K281282237	WHITE	1026993	2008	CHEV	4531	IMPALA	529651 - HHSC -
529651026994	529-2200-2001	2G1WB58K681285481	WHITE	1026994	2008	CHEV	4531	IMPALA	529651 - HHSC -
529651027034	2200-2003	2G1WB58K981286463	WHITE	1027034	2008	CHEV	4531	IMPALA	529651 - HHSC -
529651027035	2200-2002	1GNDV23W08D144710	WHITE	1027035	2008	CHEV	5842	UPLANDER	529651 - HHSC -
529651767346	655-43594	1B7HC16X8XS310934	WHITE	767346	1999	DODG	6400	RAM 1500 TRUCK	529651 - HHSC -
529651946324	655-17029	1H5R0402XFM032501	WHITE	946324	1985	HOBB	40000	REEFER	529651 - HHSC -
529651961417	655-32006	1PT011NJ2M9007666	WHITE	961417	1991	TRAI	50000	011N1UAJ	529651 - HHSC -
529651968448	65536447	1FTYA95X7RVA11927	WHITE	968448	1994	FORD	48000	LT9000	529651 - HHSC -
529651972549	655-38280	1PT011NH9S9008890	WHITE	972549	1995	TRAI	65000	011N1UAL	529651 - HHSC -
529651972550	655-38279	1PT011NH0S9008891	WHITE	972550	1995	TRAI	65000	011N1UAL	529651 - HHSC -
529651989493	65543822	1PT01ANH7Y9010579	WHITE	989493	2000	TRAI	65000	01AN	529651 - HHSC -

23 – Equipment Disposal

- Fleet Management > Setup/Inventory > Equipment Inventory > Equipment Inventory
- Getting Started Tutorial pp. 53-54
- Exercise:
  - Select an Equipment you wish to dispose of
  - Define the following fields:
    - Out-of-service date
    - Disposal Method
    - Disposal Comment
    - Est. Meter at Disposal
    - Disposal Date
    - Disposal Costs
    - Net Disposal Proceeds

24 – Transfer Vehicle

- Business process to transfer an equipment from one agency to another (no parent child relationship).



Transfer From Agency

Dispose of Vehicle (22) + define Field Transfer to Agency

Transfer From Agency

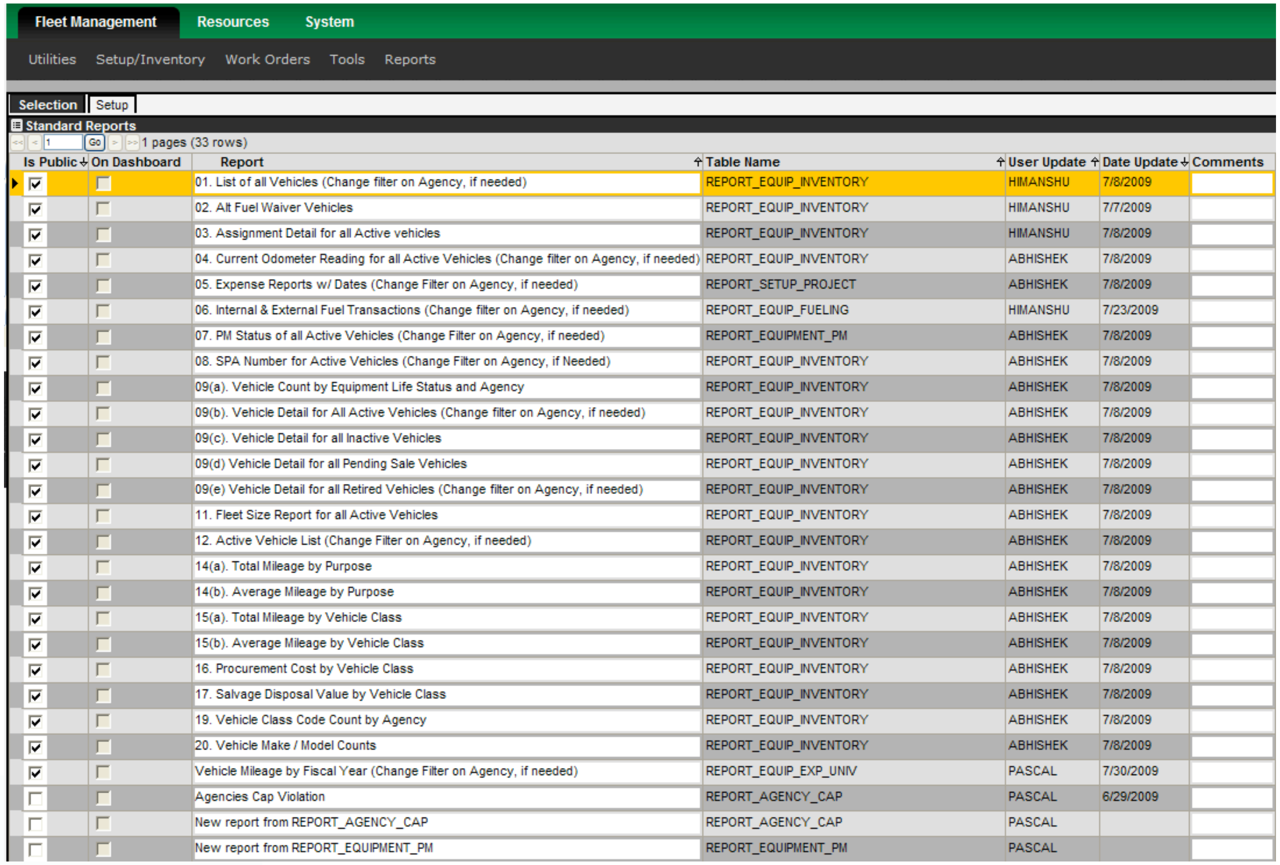
Send email to Transfer to Agency

Transfer To Agency

Acquire New Vehicle (Equipment Acquisition Window)

25 – Reports – Standard

- Allows to reuse preset templates, create ad-hoc report, save your own template, make reports public…



Standard Reports

1 pages (33 rows)

Is Public	On Dashboard	Report	Table Name	User Update	Date Update	Comments
☑	☐	01. List of all Vehicles (Change filter on Agency, if needed)	REPORT_EQUIP_INVENTORY	HIMANSHU	7/8/2009	
☑	☐	02. Alt Fuel Waiver Vehicles	REPORT_EQUIP_INVENTORY	HIMANSHU	7/7/2009	
☑	☐	03. Assignment Detail for all Active vehicles	REPORT_EQUIP_INVENTORY	HIMANSHU	7/8/2009	
☑	☐	04. Current Odometer Reading for all Active Vehicles (Change filter on Agency, if needed)	REPORT_EQUIP_INVENTORY	ABHISHEK	7/8/2009	
☑	☐	05. Expense Reports w/ Dates (Change Filter on Agency, if needed)	REPORT_SETUP_PROJECT	ABHISHEK	7/8/2009	
☑	☐	06. Internal & External Fuel Transactions (Change filter on Agency, if needed)	REPORT_EQUIP_FUELING	HIMANSHU	7/23/2009	
☑	☐	07. PM Status of all Active Vehicles (Change Filter on Agency, if needed)	REPORT_EQUIPMENT_PM	ABHISHEK	7/8/2009	
☑	☐	08. SPA Number for Active Vehicles (Change Filter on Agency, if Needed)	REPORT_EQUIP_INVENTORY	ABHISHEK	7/8/2009	
☑	☐	09(a). Vehicle Count by Equipment Life Status and Agency	REPORT_EQUIP_INVENTORY	ABHISHEK	7/8/2009	
☑	☐	09(b). Vehicle Detail for All Active Vehicles (Change filter on Agency, if needed)	REPORT_EQUIP_INVENTORY	ABHISHEK	7/8/2009	
☑	☐	09(c). Vehicle Detail for all Inactive Vehicles	REPORT_EQUIP_INVENTORY	ABHISHEK	7/8/2009	
☑	☐	09(d) Vehicle Detail for all Pending Sale Vehicles	REPORT_EQUIP_INVENTORY	ABHISHEK	7/8/2009	
☑	☐	09(e) Vehicle Detail for all Retired Vehicles (Change filter on Agency, if needed)	REPORT_EQUIP_INVENTORY	ABHISHEK	7/8/2009	
☑	☐	11. Fleet Size Report for all Active Vehicles	REPORT_EQUIP_INVENTORY	ABHISHEK	7/8/2009	
☑	☐	12. Active Vehicle List (Change Filter on Agency, if needed)	REPORT_EQUIP_INVENTORY	ABHISHEK	7/8/2009	
☑	☐	14(a). Total Mileage by Purpose	REPORT_EQUIP_INVENTORY	ABHISHEK	7/8/2009	
☑	☐	14(b). Average Mileage by Purpose	REPORT_EQUIP_INVENTORY	ABHISHEK	7/8/2009	
☑	☐	15(a). Total Mileage by Vehicle Class	REPORT_EQUIP_INVENTORY	ABHISHEK	7/8/2009	
☑	☐	15(b). Average Mileage by Vehicle Class	REPORT_EQUIP_INVENTORY	ABHISHEK	7/8/2009	
☑	☐	16. Procurement Cost by Vehicle Class	REPORT_EQUIP_INVENTORY	ABHISHEK	7/8/2009	
☑	☐	17. Salvage Disposal Value by Vehicle Class	REPORT_EQUIP_INVENTORY	ABHISHEK	7/8/2009	
☑	☐	19. Vehicle Class Code Count by Agency	REPORT_EQUIP_INVENTORY	ABHISHEK	7/8/2009	
☑	☐	20. Vehicle Make / Model Counts	REPORT_EQUIP_INVENTORY	ABHISHEK	7/8/2009	
☑	☐	Vehicle Mileage by Fiscal Year (Change Filter on Agency, if needed)	REPORT_EQUIP_EXP_UNIV	PASCAL	7/30/2009	
☐	☐	Agencies Cap Violation	REPORT_AGENCY_CAP	PASCAL	6/29/2009	
☐	☐	New report from REPORT_AGENCY_CAP	REPORT_AGENCY_CAP	PASCAL		
☐	☐	New report from REPORT_EQUIPMENT_PM	REPORT_EQUIPMENT_PM	PASCAL		

25 – Reports - Standard

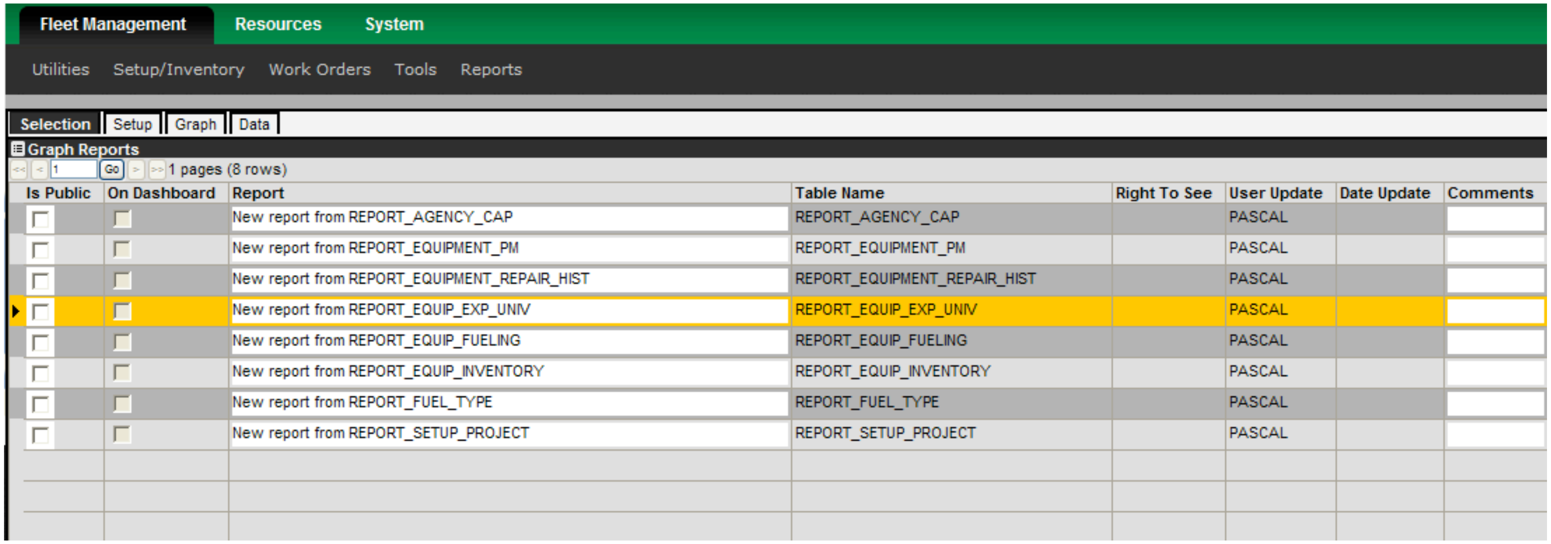
- Fleet Management > Report > Standard Reports
- Getting Started Tutorial pp. 87, 90-94
- Exercise:
  - Reuse the existing template “01. List of all Vehicles”, change the filter to review your agency’s vehicle.
  - Reuse the existing template “14(a). Total Mileage by Purpose”, change filter to your agency and display average mileage per vehicle class in you agency.
  - Create new report to display Equipment Name, Model, Make and Current Meter Reading for vehicles in your agency (only active vehicles).

25 – Reports - Standard

- Fleet Management > Report > Standard Reports
- Getting Started Tutorial pp. 90-94
- Exercise:
  - Create new report to display Vehicle Class, Month and Year, Average Usage for the vehicles in your agency (per Vehicle Class).
  - Create new report to view the Fuel amounts and Costs for your equipment (only active) since January 2009 - only fuel types first, then incidentals
  - Create new report to view total repair costs on your vehicles by vehicle class for your agency since January 2009.

26 – Reports - Graphs

- Allows for creating easily graphical reports and obtaining aggregated information


Fleet Management
Resources
System
Utilities
Setup/Inventory
Work Orders
Tools
Reports
Selection
Setup
Graph
Data
Go

Graph Reports

1 pages (8 rows)

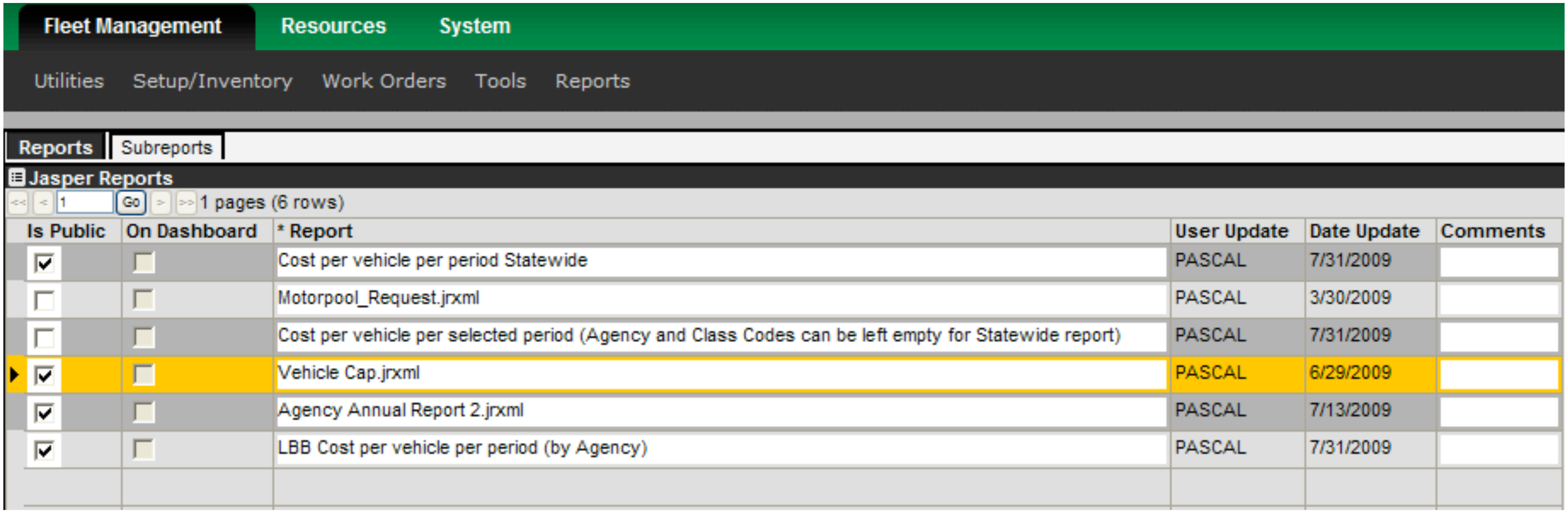
Is Public	On Dashboard	Report	Table Name	Right To See	User Update	Date Update	Comments
☐	☐	New report from REPORT_AGENCY_CAP	REPORT_AGENCY_CAP		PASCAL		
☐	☐	New report from REPORT_EQUIPMENT_PM	REPORT_EQUIPMENT_PM		PASCAL		
☐	☐	New report from REPORT_EQUIPMENT_REPAIR_HIST	REPORT_EQUIPMENT_REPAIR_HIST		PASCAL		
☐	☐	New report from REPORT_EQUIP_EXP_UNIV	REPORT_EQUIP_EXP_UNIV		PASCAL		
☐	☐	New report from REPORT_EQUIP_FUELING	REPORT_EQUIP_FUELING		PASCAL		
☐	☐	New report from REPORT_EQUIP_INVENTORY	REPORT_EQUIP_INVENTORY		PASCAL		
☐	☐	New report from REPORT_FUEL_TYPE	REPORT_FUEL_TYPE		PASCAL		
☐	☐	New report from REPORT_SETUP_PROJECT	REPORT_SETUP_PROJECT		PASCAL		

26 – Reports - Graphs

- Fleet Management > Report > Graph Reports
- Getting Started Tutorial pp. 88, 94-97
- Exercise:
  - Create new report to display the Average Usage (colored by Vehicle Class) for the months ranging between January 2008 and December 2008
  - Create a report to display an active vehicle count per vehicle class for your agency
  - Create a linear graph for the depreciation of one of your vehicles

27 – Reports – Jasper Reports

- Allows for displaying customized report (preset) containing additional information


Fleet Management
Resources
System
Utilities
Setup/Inventory
Work Orders
Tools
Reports
Reports
Subreports
Jasper Reports
1
Go
1 pages (6 rows)

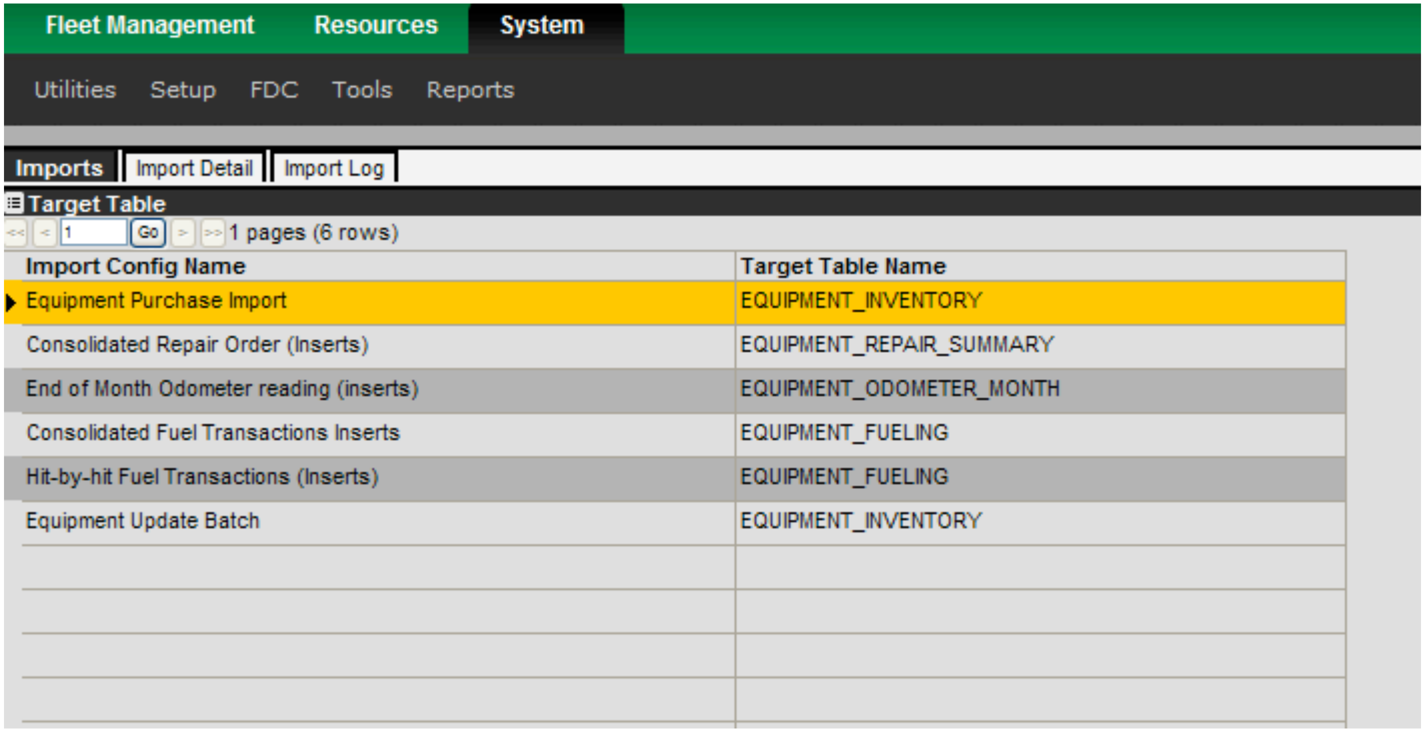
Is Public	On Dashboard	* Report	User Update	Date Update	Comments
☑	☐	Cost per vehicle per period Statewide	PASCAL	7/31/2009	
☐	☐	Motorpool_Request.jrxml	PASCAL	3/30/2009	
☐	☐	Cost per vehicle per selected period (Agency and Class Codes can be left empty for Statewide report)	PASCAL	7/31/2009	
☑	☐	Vehicle Cap.jrxml	PASCAL	6/29/2009	
☑	☐	Agency Annual Report 2.jrxml	PASCAL	7/13/2009	
☑	☐	LBB Cost per vehicle per period (by Agency)	PASCAL	7/31/2009	

27 – Reports – Jasper Reports

- Fleet Management > Report > Jasper Reports
- Getting Started Tutorial pp. 88-89
- Exercise:
  - Show the report “LBB Cost per Vehicle per Period (per Agency)
  - Show the report “Agency Annual Report”
  - Show the report “Vehicle Cap”

28 – Batching

- Allows to batching the data (for batching agencies).


Fleet Management
Resources
System
Utilities
Setup
FDC
Tools
Reports
Imports
Import Detail
Import Log
Target Table
1
Go
1 pages (6 rows)

Import Config Name	Target Table Name
Equipment Purchase Import	EQUIPMENT_INVENTORY
Consolidated Repair Order (Inserts)	EQUIPMENT_REPAIR_SUMMARY
End of Month Odometer reading (inserts)	EQUIPMENT_ODOMETER_MONTH
Consolidated Fuel Transactions Inserts	EQUIPMENT_FUELING
Hit-by-hit Fuel Transactions (Inserts)	EQUIPMENT_FUELING
Equipment Update Batch	EQUIPMENT_INVENTORY

28 – Batching

- System > Tools > Import Runner
- Getting Started Tutorial pp. 100-109

- Exercise:
  - Upload your files on the servers
  - Upload new vehicles
  - Update existing vehicle
  - Upload monthly repair costs
  - Upload monthly odometer readings
  - Upload fueling transactions (hit-by-hit of summary)

Questions

Congratulations