Vehicle Coordinator Training Manual

Ministry of Central Services Commerical Services Central Vehicle Agency

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INTRODUCTION

This manual outlines the step-by-step processes for Vehicle Coordinators to authorized or denied CVA pool users within FleetWave[®], the Government's online fleet management system. This manual was created to train Vehicle Coordinators in the use on the new CVA management system and reinforce some of the responsibilities involving these duties.

FleetWave[®] is a web-based fleet management system developed using web technologies and adaptable to individual fleet necessities. It can be used from different locations – all that is needed is a computer, access to the Internet and a valid username and password. By switching to FleetWave[®], CVA will see savings and efficiencies in many areas. Online processes enable CVA to reduce paper consumption by eliminating forms. FleetWave[®] also allows CVA to be more efficient by running all of its processes through the same system. The system gives CVA the tools to have detailed reporting for analysis and improvement of service delivery strategies.

The following section will guide you in the process needed to use FleetWave[®] for Vehicle Coordinators operations.

RESPONSIBILITIES OF POOL COORDINATORS

This training manual is focused on FleetWave[®], and there are many other things that coordinators are responsible for in the management of your organization's vehicle fleet.

Within the FleetWave® system, Vehicle Coordinators have the following responsibilities:

- Managing drivers. Help drivers become approved to book pool vehicles in the FleetWave® system is part of the Vehicle Coordinators responsibilities. Drivers who are not authorized will not be able to book pool vehicles until they obtain that authorization and a P-number to log in to the system. It is also Vehicle Coordinators responsibility to notify CVA when drivers are no longer authorized to use pool vehicles so that their system authorization can be removed.
- **Managing pool bookings**. Vehicle Coordinators do not need to take any action to approve pool bookings, but if a driver needs to change or cancel their booking, this will be done by their coordinator.

LOGGING INTO FLEETWAVE

A driver who wants to be able to use a CVA pool vehicle will need to create a pool authorization request in FleetWave[®]. In this process, they will select their Level 3 customer name, which is connected to a vehicle coordinator. You as coordinator will receive an email notifying you of the request.

- Open your internet browser and go to the following address: <u>http://saskfleet.gov.sk.ca</u>. This will take you to FleetWave[®].
- 2. Type your assigned username and password into the appropriate fields on the top left section of the screen and click on the "Login" button (Figure 1).



Figure 1 – Login screen

NAVIGATING FLEETWAVE

Home page

The home page is where you will find yourself when you log in to FleetWave[®] (Figure 2). This is where you will have access to quick report windows in the middle of your screen and navigation options at the top of the page.

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Figure 2 – Home page

Modules

Each business/service area within FleetWave[®] has its own module within the system. You can navigate to any module from any other module in FleetWave[®] by clicking on the button at the top of the page for that module (Figure 3).

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Home page	Pool Search J Po	ol Reservations	Help				

Figure 3 – Module navigation bar

Edit mode

In order to make any changes or manipulate any records within FleetWave[®], you must enter that record in edit mode. If you click on the name or number of a record, you will be in view mode. To enter a record in edit mode, you can either click on the "Edit" button on the lower right part of the screen from view mode, or you can click on the yellow folder icon 🖆 beside the record name or number (Figure 4).

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Figure 4 – Entering a record in edit mode

Filter / Search function

Some modules may have a large number of records within them, which makes finding a specific record difficult. You can use the filter/search function within modules (Figure 5) to narrow down the list to the one(s) you are looking for. Simply select the category you want to search by, and type in the search term, clicking "Search" or hitting "Enter" on your keyboard to initiate the search.

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Figure 5 – Search toolbar

Cancelling out of a record

When you have entered a record in edit or view mode, and you want to exit the record without making or saving any changes, simply click on the "Cancel" button at the lower right corner of your screen.

AUTHORIZE POOL DRIVERS

A driver will request a pool authorization, in order to book pool vehicles through FleetWave[®]. The task in this section is to review how to authorize or denied a pool authorization request.

1. Click in the "Pool Authorization Request" tab in the home page.

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From this home page you can easily and quickly reach all parts of the system.					Next carries by weeks 1
Click menu selection at the top of the page to work in an area, or Select your Right-click mouse button to display the full menu					Next inspection 1
To add additional messages - Right Click -> Utilities -> Messages					
FleetWave 10/02/2014					
(Pool Credit Cards Not Returned 🛛 🔻 🖆 🎒	PM Service 90 days Overdue	VA 6 🖨	Inspections 90 days Overdue	VA E	3
	Unit Next Vehicle Vehicl Numberservice Coordinator by weeks 118042 08/11/2006Robert robert. 118190 17/11/2006Robert daphne Veitch 313940 04/12/2007Darren daren	e Coordinator Email nacduff@rqhealth.ca .veitch@gov.sk.ca gebhardt@gov.sk.ca	Unit Next Vehicle Numberinspection Coordinato 172379 13/12/2013 Cecile Shatilla 151647 13/12/2013 Cheryl Nelson 150375 13/12/2013 Kendra Neuls	Vehicle Coordinator Email cecile.shatilla@kyrha.sk.ca cheryl.nelson@pnrha.ca kendra.neuls@rqhealth.ca	
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Maint Rec# Job date Job status 2 R071541 08/01/2014 COMPLETED	Changed by CARSONT	Total gross 2136.75			

Figure 6 – Pool Auth request

- 2. Open the diver record in edit mode. If you click on the name, you will not be able to make any changes or approve the request. In that case, you can click on the "Edit" button at the bottom right of the screen, or click on "Cancel" to go back to the list of records.
- 3. Verify the vehicle coordinator is your name.
- 4. Verify driver's approving authority name and email address.
- 5. If information is correct, you need to change the dropdown boxes in the next section to "yes".

Pool Auth Requ	Jest			
Pool Auth Request				
Complete all required fields and	click "Save" at the bottom right corner of the page to rece	ive confirmation email.		
Pool Use Status	REQUESTED V			
First Name	DBIVEB		Last Name TEST	 Initial
e-Mail		*		
Office phone	122456799			
	123430703			
Level 3 - Customer#/Vote/SubVote			▼ . ¹	
Level 2 - Customer Billing Numbe				
Customer Vote	00037			
Customer Subvote	10010 3			
Vehicle Coordinator	Michelle McIntosh			
Vehicle Coordinator Email	Michelle.McIntosh@gov.sk.ca			
Vehicle Coordinator Phone	306,787,7372			
Approving Authority Name	TESTCOR * 4			
Approving Authority Email	TESTCOR@GOV.SK.CA			
Do not approve requests without	verifying the Approving Authority Name and Email data pr	ovided		
Approving Authority Name Verified	No V			
Approving Authority Email Verified	No 🗸 🖌			
Created by	PORTALANO 5			
Created date	18/02/2014			
Changed by	TESTCOR			
Changed date	18/02/2014			
Record Keyword	REQ			

Figure 7 – Vehicle coordinator information and approving authority name verification.

6. Change the "pool use status" dropdown at the top of the page to "approved", or to "denied" if something is missing or inaccurate.

Pool Auth Req	uest				
Pool Auth Request					
Complete all required fields ar	CIICK Save at the botte in right corn	er of the page to receiv	ve confirmation email.		
Pool Use Status	APPROVED 🗸 🖌				
First Name	DRIVER			Last Name TEST	* Initial
e-Mail	DRIVER.TEST@GOV.SK.CA		*		
Office phone	123456789	A			

Figure 8– Approve pool use status.

7. Click the "Save" button floating in the bottom right corner of the screen in order to complete the action and save the changes you have made. If you have approved the request, the driver will receive an email with their P-number and password, and they are now authorized to book CVA pool vehicles.

POOL BOOKINGS AUTHORIZATION

Now that you have some authorized drivers in the system, they are going to book pool vehicles. Drivers will be able to use their authorized P-number to log in and book pool vehicles. Part of your responsibilities is to approve or deny this authorization.

When a driver books a pool vehicle, you will receive an email notifying you of the booking.

If you do not need to cancel, verify, or change the booking, no action is required on your part.

Review and/or change a booking

- 1. Log in to FleetWave[®].
- 2. Go to the "Pool Reservations" tab.

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	Home Vehicles Drivers	Allocation History Pool Aut	th Request Capital	Accidents Tickets and Fines	Fuel Only Distance Only Reports
	License Tran Car Wash	Vehicle Requests Pool S	earch Pool Reservations	JRL Links Help	
	Home page			-	

Figure 9 – Pool Reservation tab.

- 3. Find the record either by looking through the list, or if there are too many bookings to easily look through, you can use the search function to narrow them down to the one you need.
- 4. Enter the record in edit mode and verify or change information such as the date and time of pickup if necessary.
- 5. Click "Save" to save the changes.

Pool Reservation	ons					
A						
Iteratch Rental Number Unit Number Model year Manufacturer Model Edenior colour License Plate Motor Pool Status APPROVEO Driver name	001110 (314211) (5) 2006 CHEVROLET Impala BLUE 557FCA TEST DBIVEB	-43	Distance Rate Apply Charge Discount Total cost I verify that I have a valid I have read and agree to the CV I authorize another person to a	0 321 0 00 0 00 0 dthers license Yes w A renta policies Yes w	Calc. Mileage Cost Calc. Minimum Cos Motor Pool Group Motor Pool Tariff Co Driver Accepted	st 321 31 de 31 Last Date Driver Accepted 7 / 7
Supervisor Email	driversupervisor@gov.sk.ca	•	Authorize	d Pickup Name		
	Cancel Reservation			Display CVA Policy		
Billing Details Level 3 - Customer#/Vote/SubVote Customer Vote Customer Subvote Customer Sub Subvote Office phone	ADVANCED EDUCATION 00037 18810					AEE0100
Driver Email	DRIVER.TEST@GDV.SK.CA					
Vehicle Coordinator Email From date 18/02/2014	Michelle.McIntosh@gov.sk.ca Pickup time		From odometer	Previous Returned Odd	vmeter	
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Figure 10 – Pool Reservation in edit mode for changes

Cancel a booking

- 1. Log in to FleetWave[®].
- 2. Go to the "Pool Reservations" tab.
- 3. Find the record either by looking through the list, or if there are too many bookings to easily look through, you can use the search function to narrow them down to the one you need.
- 4. Click on the "Cancel Reservation" button (Figure 11).
- 5. Click "Save" button.

Pool Reserva	tions					
8						
Dispatch Rental Number	001110					
Unit Number	314211 *🖾	Ĩ	Distance Rate	0.321	Calc. Mileage Cost	
Model year	2006		Apply Charge	~	Calc. Minimum Cos	t 32.1
Manufacturer	CHEVROLET		Discount	0.00		
Model	Impala		Total cost	0.00		
Exterior colour	BLUE				Motor Pool Group	31
License Plate	567FCA				Motor Pool Tariff Co	de 31
Motor Pool Status			I verify that I have a valid	drivers license Yes 🔽	Driver Accepted	Last Date Driver Accepted
APPROVED			I have read and agree to the CVA	rental policies 😽 🗸		77
Driver name	TEST, DRIVER	*	I authorize another person to pi	ckup this rental No 💌		17
Supervisor Email	driversupervisor@gov.sk.ca	<u> </u>	Authorized	l Pickup Name		
	Cancel Reservation			Display CVA Policy		

Figure 11 – Pool Reservation to cancel bookings.

GLOSSARY

Authorized Pool User – This is a driver who has been authorized to use CVA pool vehicles and has been assigned a P-number and password.

P-number – is a username given to an authorized pool user to sign into FleetWave[®] so that they can book a pool vehicle.

Record – we are talking about a particular set of information within FleetWave[®]. It may be a request for pool authorization, a vehicle record or a pool booking, for example.

Approving Authority – normally a direct supervisor, this is the person who approves pool usage authorization requests and bookings.

Vehicle Coordinator – the primary contact within the Client Organization for CVA vehicles matters.

CVA Client Organization - an organization that uses CVA vehicles (pool or otherwise).

REFERENCES

See the *CVA Pool Driver Training Manual* for step-by-step instructions about how a driver becomes an authorized user and books CVA pool vehicles.

Vehicle Coordinator Training Webinar: http://www.employeeservices.gov.sk.ca/cva

FleetWave® website: http://saskfleet.gov.sk.ca