



FleetFocus User Manual

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Prepared for:
Office of Vehicle Fleet Management
State of Texas



Table of Contents

This manual provides step-by-step instructions for setting up and using FASuite.

Section		Page
I.	GUI Interface/General System Operation	3
II.	Primary Vehicle Information	19
III.	Subsystems – Parts - Specifications	74
IV.	Warranty	100
V.	Data Entry/Maintenance	116
VI.	Reports	150



GUI Interface/General System Operation

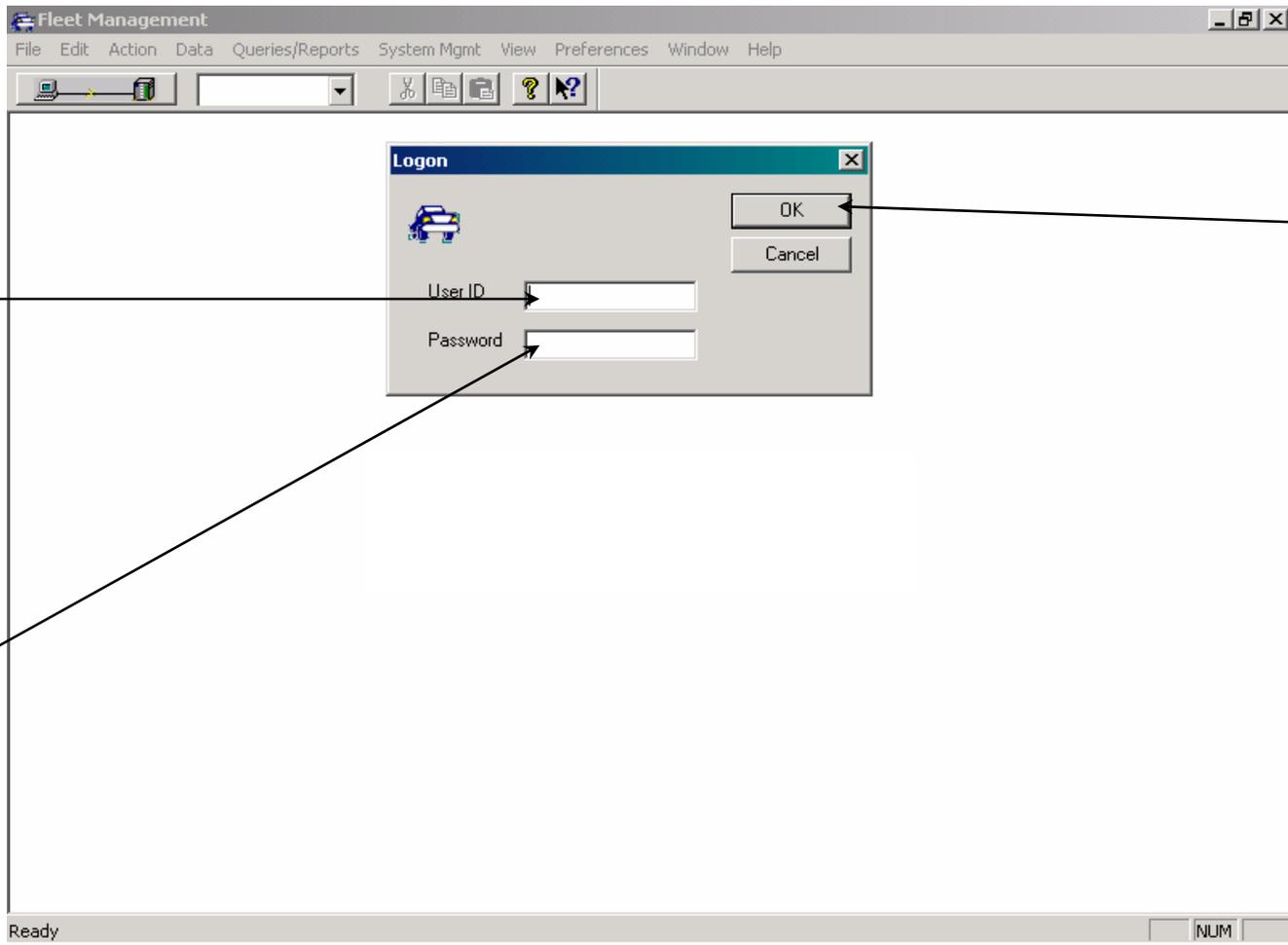
Section I



Section I Contents

	Topic	Page
1.	Logging on to FleetFocus FA	5
2.	Changing your FleetFocus Password	6
3.	Example of Using the FleetFocus FA Menus	7
4.	Graphical User Interface	8
5.	Action Buttons	9
6.	Creating Toolbar Buttons	10
7.	Using the Keyboard on the Posting Screens	12
8.	FleetFocus FA GUI Basics – Filter	13
9.	Saving Filters and Sorts	15
10.	Export Data Filters	16
11.	Using the Online Help	17
12.	Saving Grid Columns	18

Logging on to FleetFocus FA



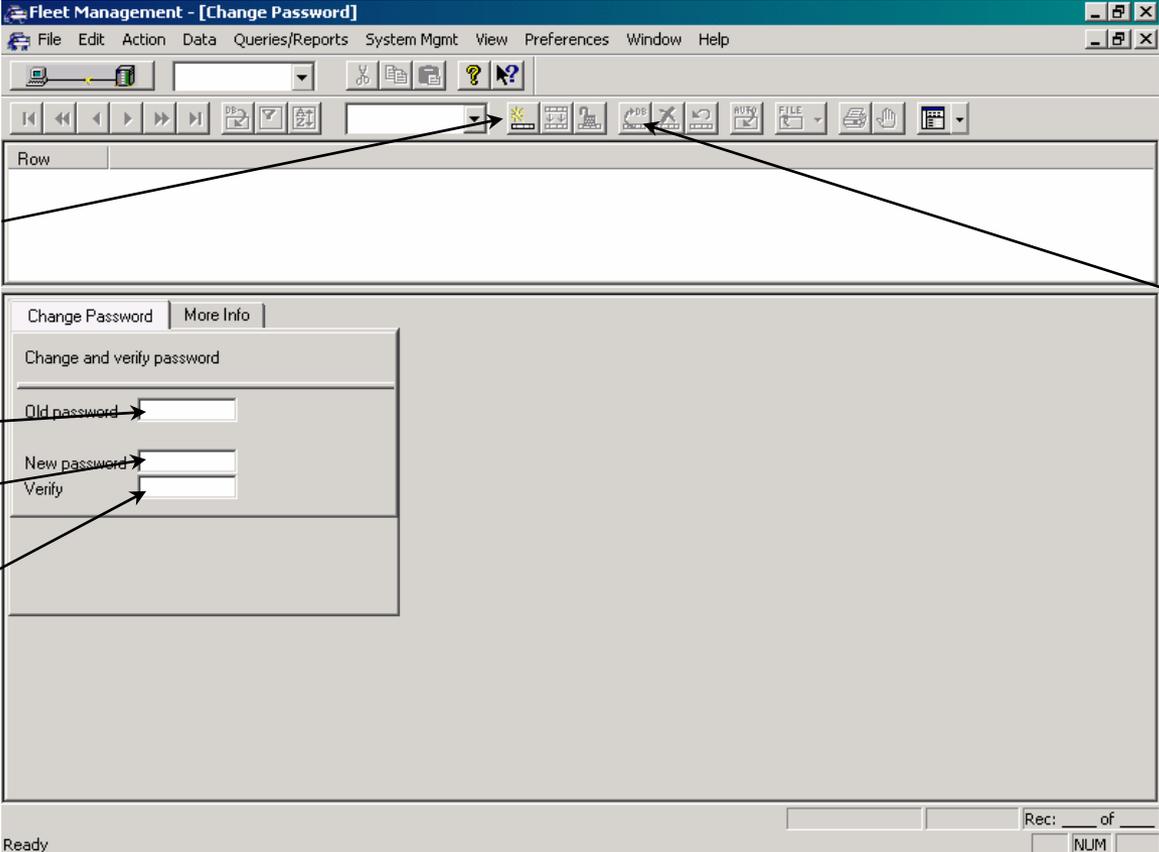
1. Enter your **User ID** here

2. Enter your **Password** here

3. Click **OK** to log on

Changing your FleetFocus FA Password

System Management → *Setup* → *Access Rights* → *Change Password*



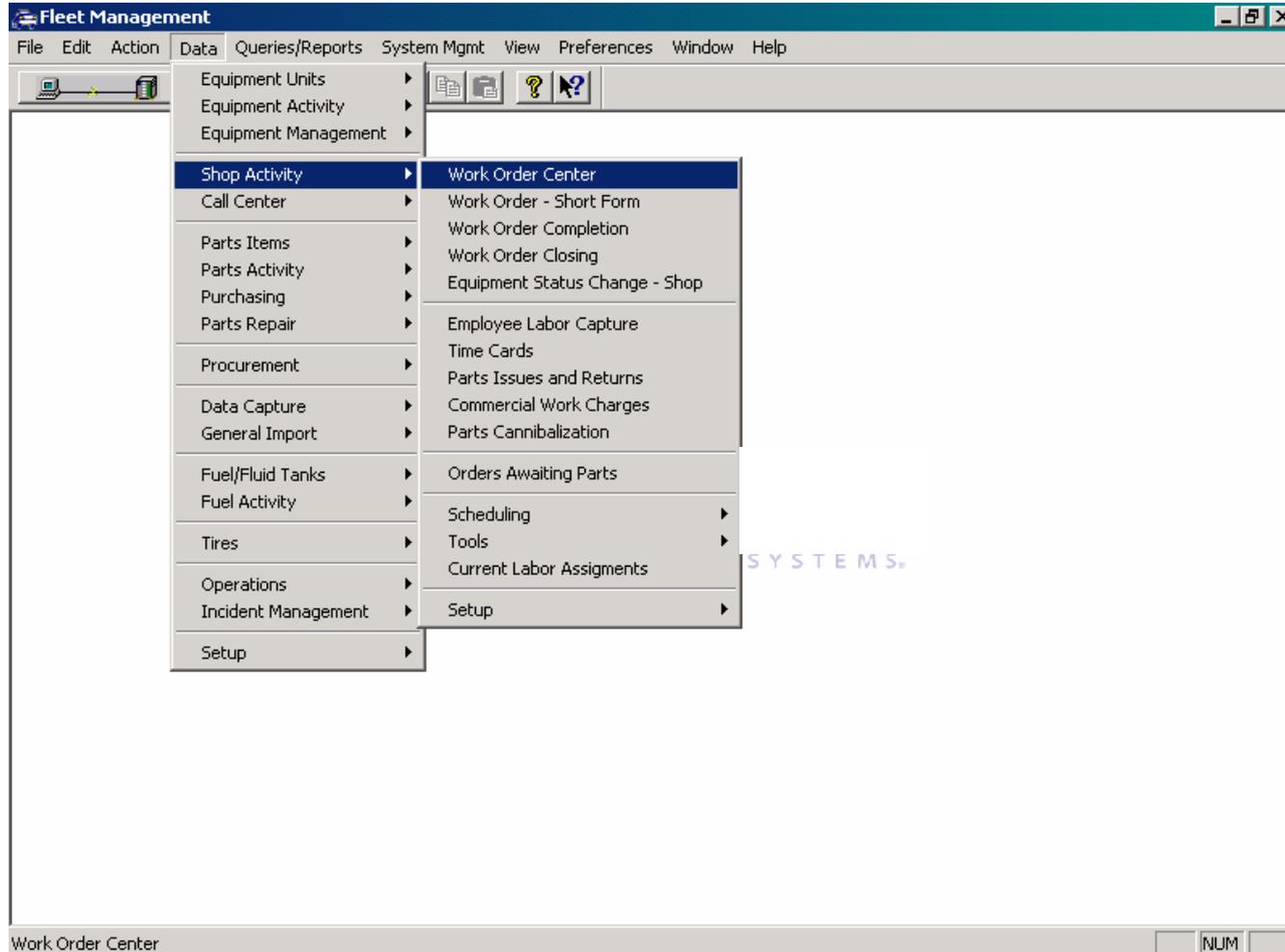
The screenshot shows the 'Fleet Management - [Change Password]' application window. The window has a menu bar (File, Edit, Action, Data, Queries/Reports, System Mgmt, View, Preferences, Window, Help) and a toolbar with various icons. The main content area is divided into two sections: a top section with a 'Row' label and a bottom section titled 'Change Password' with a 'More Info' tab. The 'Change Password' section contains three input fields: 'Old password', 'New password', and 'Verify'. The status bar at the bottom shows 'Ready' and 'Rec: ___ of ___'.

1. Click here to **Prepare for insert.** (Arrow points to the 'Prepare for insert' icon in the toolbar)
2. Type your **Old password.** (Arrow points to the 'Old password' input field)
3. Type your **New password.** (Arrow points to the 'New password' input field)
4. Type your new password again to **Verify** it. (Arrow points to the 'Verify' input field)
5. Click here to **process.** (Arrow points to the 'Process' icon in the toolbar)



Example of Using the FleetFocus FA Menus

Data → *Shop Activity* → *Work Order Center*



Graphical User Interface (GUI)

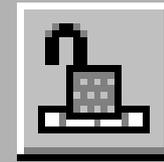
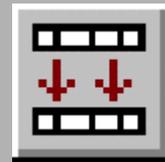
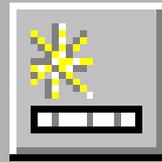
The screenshot shows a software window titled "Fleet Management - [Fleet Equipment]". The interface includes a menu bar at the top with options like File, Edit, Action, Data, Queries/Reports, System Mgmt, View, Preferences, Window, and Help. Below the menu bar is a communication indicator and a toolbar with various icons. A row of movement buttons for the grid is located below the toolbar. The main area contains a data grid with columns for Row, Equipment ID, Model year, Manufacturer ID, Model ID, License number, Operator ID, Department ID, and Latest meter 1 rea. Below the grid is a tabbed interface with tabs for Class PM Program, Individual PM Program, Inspections, Codes, Recurring Costs, Credit Cards, Acquisition, Registration, Multi-jurisdictional Registration, Ownership and Depreciation, Warranty, Replacement and Disposition, Position Info, and Additional Data. The "Basic Info" tab is active, showing fields for Equipment ID, Model year, Manufacturer ID, Model ID, Equipment type, Description, Color, Serial number, Asset number, and Associated file. A status bar at the bottom indicates "Ready" and shows "Rec: ___ of ___" and "NUM".

Labels and arrows pointing to GUI components:

- Menu Bar
- Communication Indicator
- Movement Buttons for the Grid
- The Grid
- Splitter Bar
- The Tabs
- Status Bar
- Reports Choice List
- Toolbar Buttons
- Action Buttons
- Custom Action Buttons

Look here for successful processing or error messages!

Action Buttons *(and Useful Keyboard Shortcuts!)*



Get Data

Filter

Define Sort

**Prepare for
Insert**

**Prepare for
Copy**

**Prepare for
Update**

(Ctrl + G)

(Ctrl + F)

(Ctrl + O)

(Ctrl + N)

(Ctrl + Y)

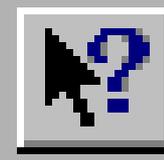
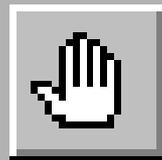
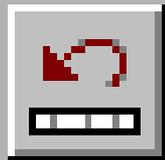
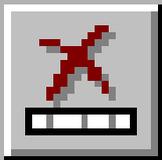
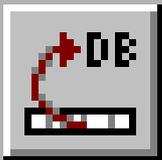
(Ctrl + U)

**Unrestricted
Get Data**

**Restricted
Get Data**

Star for Start

Unlock



Process

Delete

Cancel

Stop

About

Help Context

(Ctrl + S)

(Ctrl + D)

(Ctrl + Z)

(F1)

Save

Undo

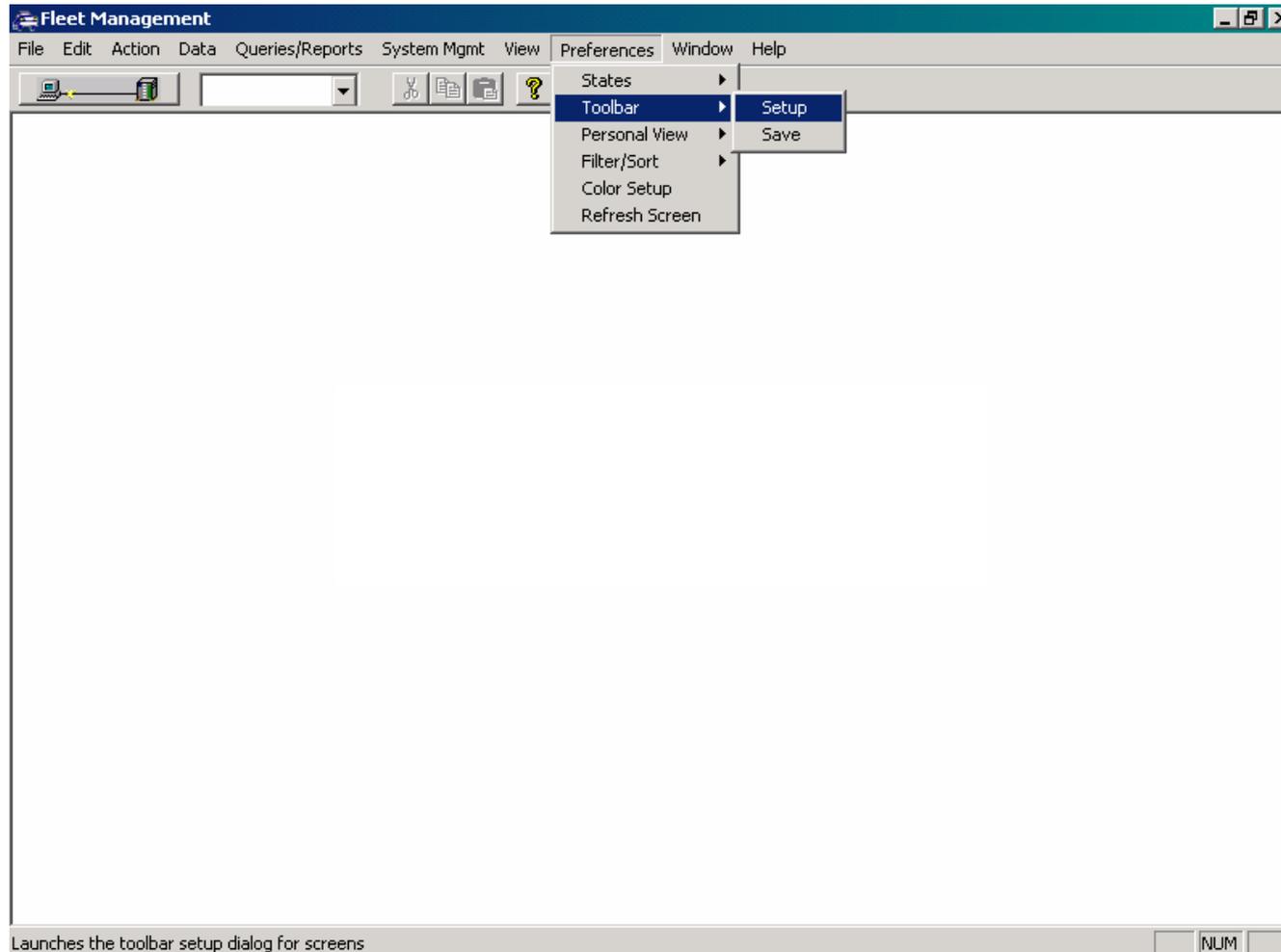
**Stop Data
Retrieval**

**Screen Specific
On-line Help**



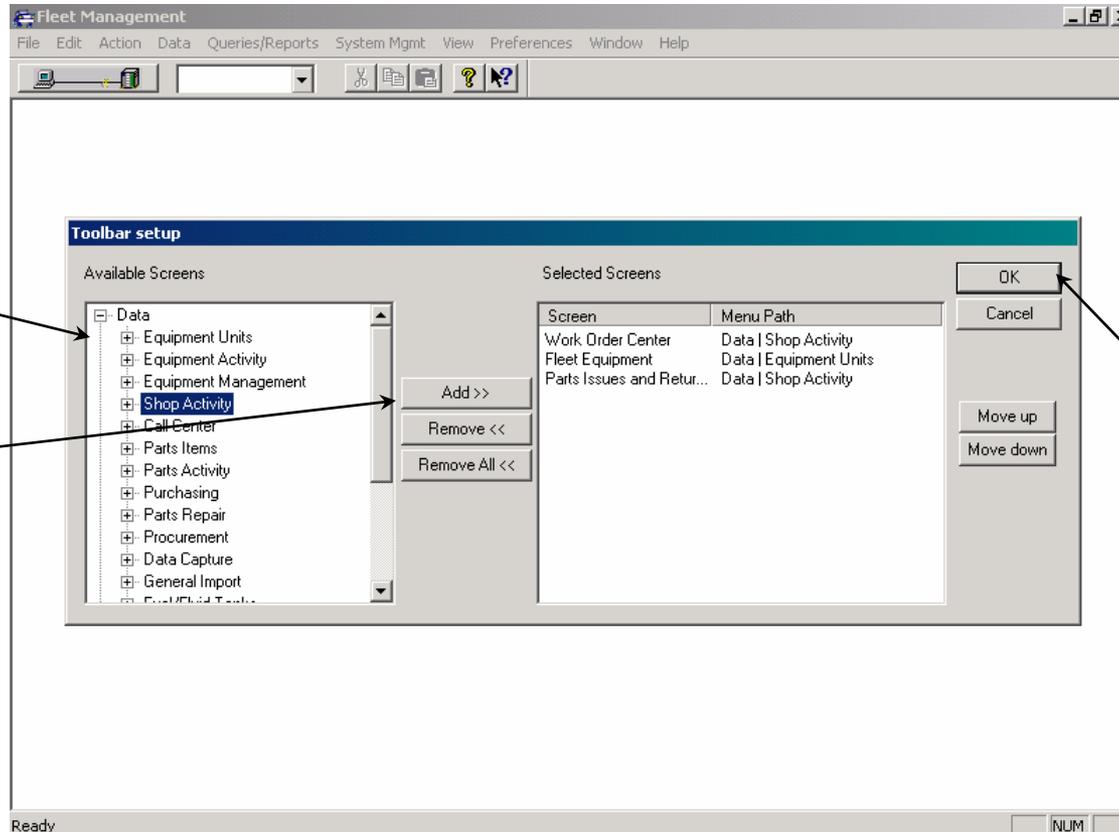
Creating Toolbar Buttons

Preferences → Toolbar → Setup



Creating Toolbar Buttons

Preferences → *Toolbar* → *Setup*



1. Navigate to screen

2. Click **Add**

3. Repeat for each screen you want to create a button for.

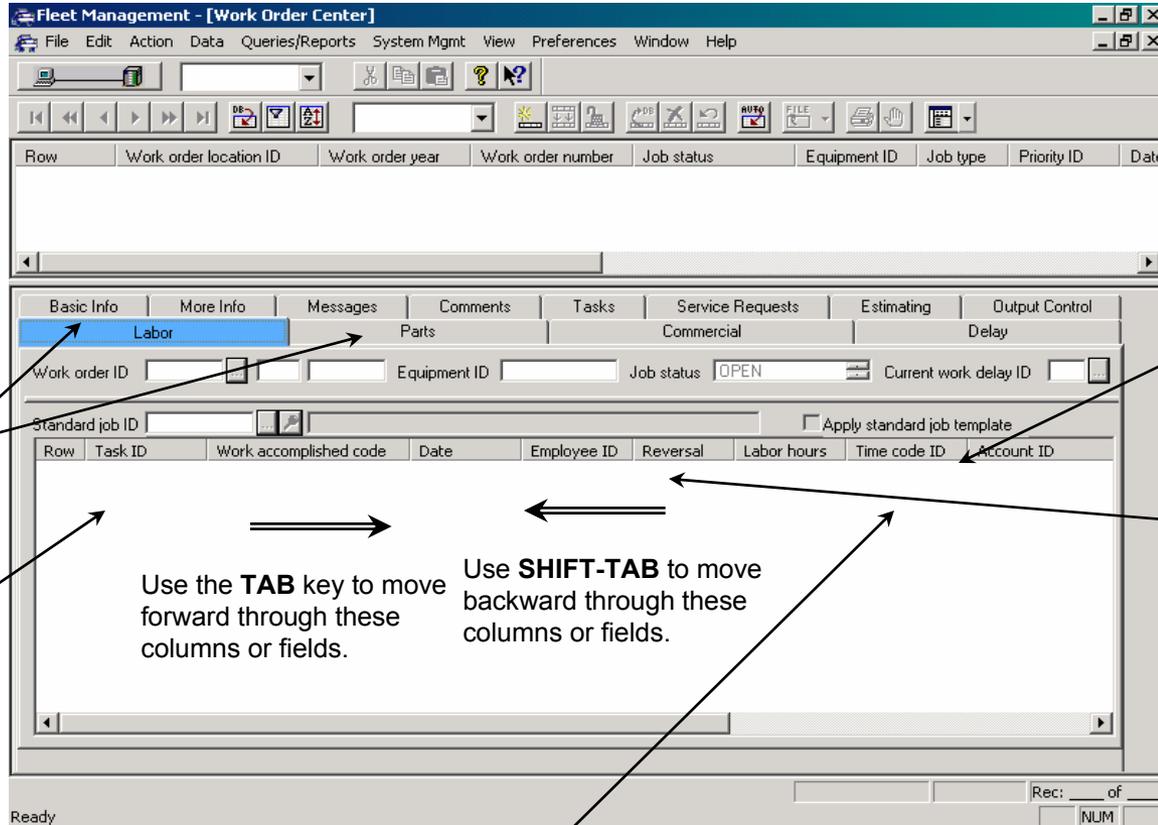
4. Click here to process.

5. When all toolbar buttons are the way you want them, go to *Preferences* → *Toolbar* → *Save* to save your changes!

Using the Keyboard on the Posting Screens

You can use the keyboard commands and shortcuts to make the data entry easier!
Remember to use the keyboard shortcuts for the Action Buttons too!

- **Ctrl + F** for the **Filter**
- **Ctrl + N** for **Prepare for Insert**
- **Ctrl + U** for **Prepare for Update (Unlock)**
- **Ctrl + S** for **Process (Save)**
- **Ctrl + Z** for **Cancel**
- **Ctrl + [SPACE]** to move into the group fields



Press **Alt + →** to move from tab to tab on a screen

Press **Ctrl + B** to remove an entire line of data BEFORE you process (you cannot remove or change the line of data AFTER you process)

Use the **TAB** key to move forward through these columns or fields.

Use **SHIFT-TAB** to move backward through these columns or fields.

F4 shows you the Choice Lists.

Use the **SPACE BAR** to mark and unmark checkboxes

Use **Shift + `** (Shift + Quote) to copy the value in the field above. For example, you can use this shortcut when entering multiple lines of labor data and need to enter the same **Employee ID** on all lines.

FleetFocus FA GUI Basics - Filter

On any screen, use the **Filter** button to look up data that is already in the system. Clicking this button brings up a “request form” that you fill out in order to limit the data displayed.



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

Filter [Get Data] [Close] [Clear] [Cancel]

Equipment ID: 103

Model year: []

Manufacturer ID: []

Model ID: []

Equipment type: []

Serial number: []

Asset number: []

Meter types class: []

Maintenance class: []

PM program class: []

Standards class: []

Rental rates class: []

Resources class: []

SLA equipment category: []

Stored location ID: []

Assigned PM location ID: []

Assigned repair location ID: []

Station location ID: []

Operator ID: []

Operator name: []

Department ID: []

Company ID: []

Account ID: []

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

Filter [Get Data] [Close] [Clear] [Cancel]

Equipment ID: []

Model year: []

Manufacturer ID: FORD

Model ID: []

Equipment type: []

Serial number: []

Asset number: []

Meter types class: []

Maintenance class: []

PM program class: []

Standards class: []

Rental rates class: []

Resources class: []

SLA equipment category: []

Stored location ID: []

Assigned PM location ID: []

Assigned repair location ID: 01

Station location ID: []

Operator ID: []

Operator name: []

Department ID: []

Company ID: []

Account ID: []

Work Order Center screen
Open repair orders at Repair location 01

Filter [Get Data] [Close] [Clear] [Cancel]

Work order location ID: 01

Work order year: []

Work order number: []

Job status: OPEN

Current work delay ID: []

From open date: []

To open date: []

Job type: REPAIR

Equipment ID: []

Service status: []

Priority ID: []

Tech/vendor: []

Repair reason ID: []

Work class: []

Warranty work: UNKNOWN

Date and time opened: []

Date and time closed: []

License number: []

Department ID: []

Reference order ID: []

User ID order opened by: []

Multi-unit project ID: []

Include messages for associated components:

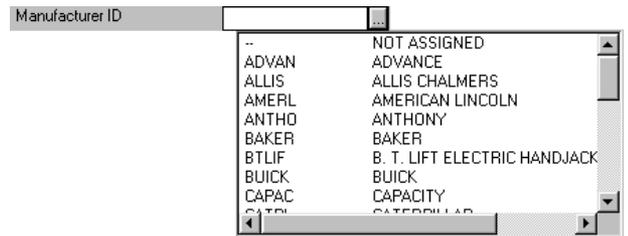
In any filter dialog box, click the Get Data button to fill the grid with matching data

FleetFocus FA GUI Basics - Filter (continued)

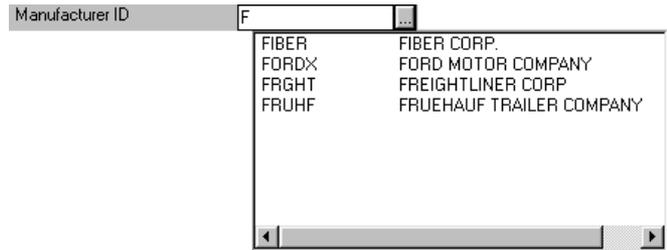
Choice Lists and Wildcards

Choice Lists

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



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



Wildcards: % and _

% = "anything"

All equipment IDs starting with F00:



All equipment with asset numbers ending with 01:

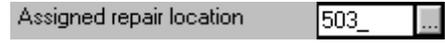


All equipment with serial numbers containing 1X05:



_ = "any single character"

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



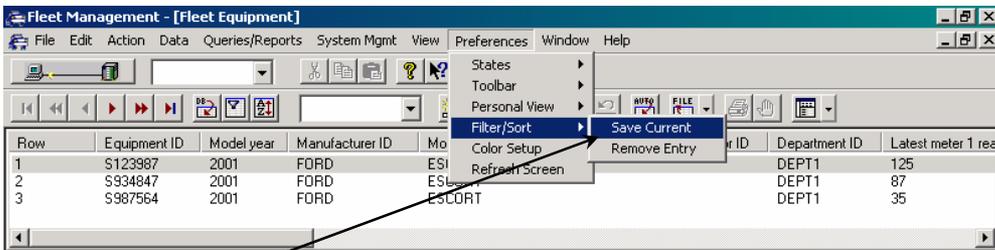
All equipment with 5-character maintenance classes starting with 83 and ending with 06:



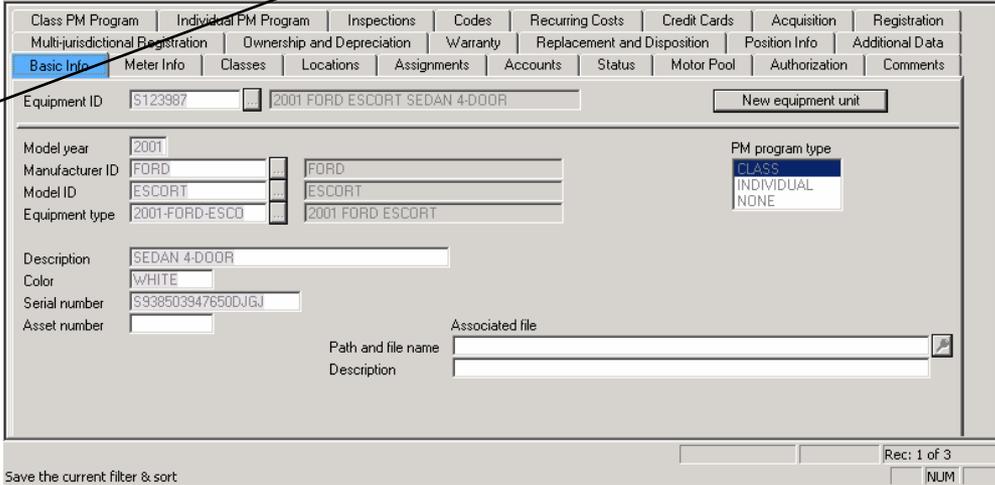
Saving Filters and Sorts

Preferences → *Filter/Sort* → *Save Current*

1. On Any screen, use the filter and sort buttons to display the data how you would like to see it

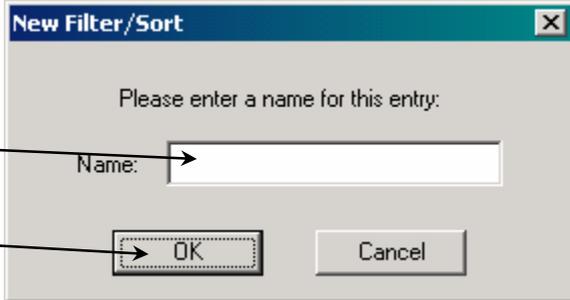


2. Navigate to the path listed above and choose: **Save Current**



3. Enter a **Name** for the saved Filter/Sort

4. Click **OK**



Export Data Features

The Export Data button on the Tool bar provides the ability to export the information in the Grid.

Steps to using the Export Data button are:

1. Use the Filter to select the data you desire to export.
2. Click the down arrow on the **Data Export Button** and select the destination where you want the data sent. You can choose the **clipboard** or **file** option. Also, you can choose to export the data as delimited or fixed length.
3. After you select the destination, re-click the **Export Data Button** and the data is exported to your destination. If you selected the file option, an Export Data Save box will open, and you can select the file path.
4. The file you save may be opened in other applications. If you selected the clipboard destination, you can Paste the file in to applications that support the cut/copy/paste functions.

Row	Work order location ID	Work order year	Work order number	Job status	File	Clipboard	Delimited	Fixed Length
1	CSPL1	2002	23	OPEN				
2	CSPL1	2002	21	OPEN	CSP-002		REPAIR	3
3	CSPL1	2002	15	OPEN	CSP-002		REPAIR	3

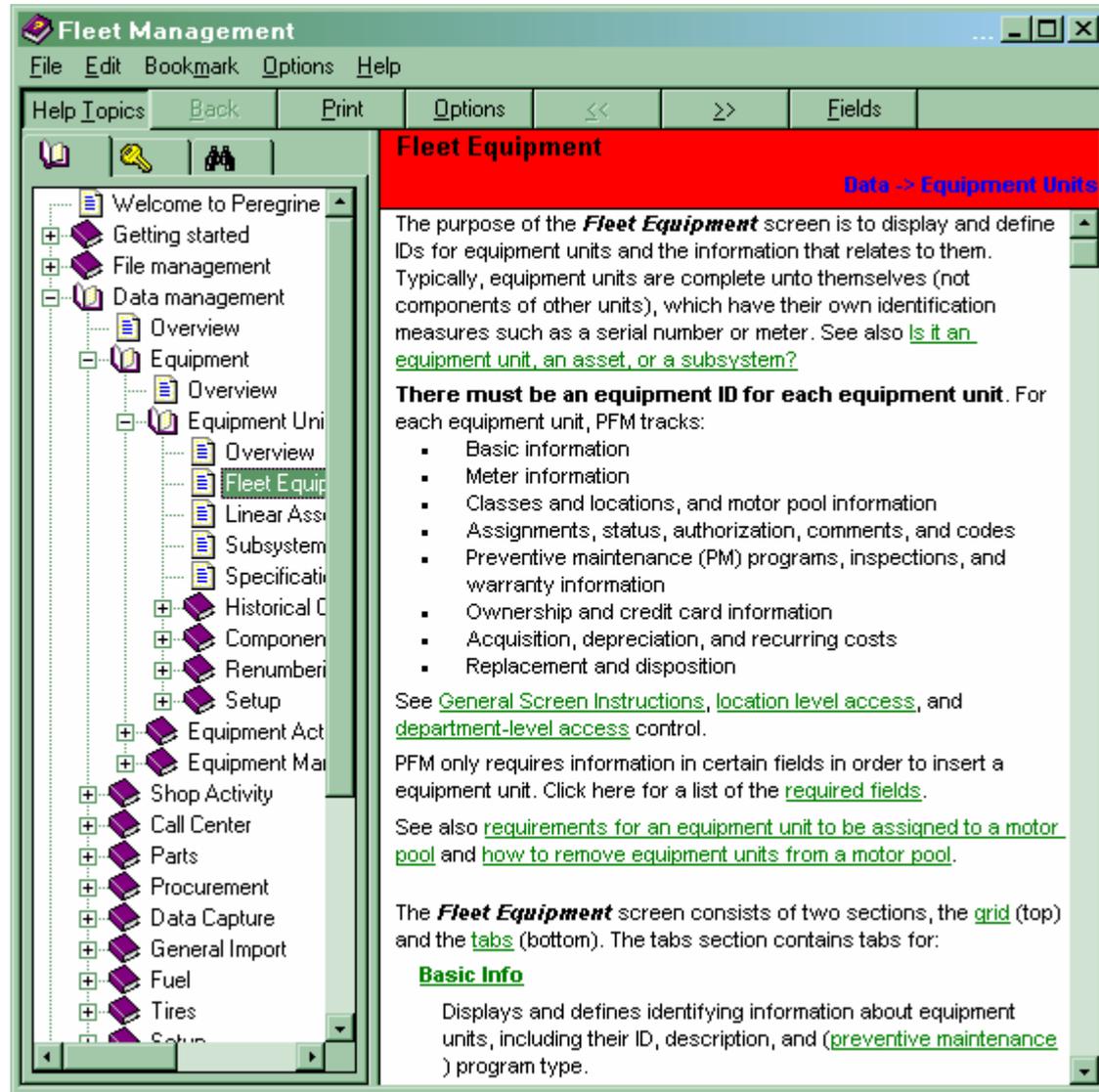
Using FleetFocus FA Online Help

Help → Contents

FleetFocus FA includes a modern online Help facility which offers:

- Quick lookup tools for explanations of a single item on a screen
- Instructions for how to accomplish tasks
- Comprehensive descriptions of what FleetFocus FA does when it processes entries and generates displays
- A full set of hypertext links, which makes it easy to move from one Help topic to another

Remember that **F1** is the shortcut to open the online Help system!



The screenshot shows a web browser window titled "Fleet Management" with a menu bar (File, Edit, Bookmark, Options, Help) and a toolbar (Help Topics, Back, Print, Options, navigation arrows, Fields). A left-hand navigation pane displays a tree structure of help topics, with "Fleet Equip" selected. The main content area has a red header "Fleet Equipment" with a link "Data -> Equipment Units". The text explains the purpose of the screen, lists required information for each equipment unit, and provides links to further instructions.

Fleet Equipment
Data -> Equipment Units

The purpose of the **Fleet Equipment** screen is to display and define IDs for equipment units and the information that relates to them. Typically, equipment units are complete unto themselves (not components of other units), which have their own identification measures such as a serial number or meter. See also [Is it an equipment unit, an asset, or a subsystem?](#)

There must be an equipment ID for each equipment unit. For each equipment unit, PFM tracks:

- Basic information
- Meter information
- Classes and locations, and motor pool information
- Assignments, status, authorization, comments, and codes
- Preventive maintenance (PM) programs, inspections, and warranty information
- Ownership and credit card information
- Acquisition, depreciation, and recurring costs
- Replacement and disposition

See [General Screen Instructions](#), [location level access](#), and [department-level access](#) control.

PFM only requires information in certain fields in order to insert a equipment unit. Click here for a list of the [required fields](#).

See also [requirements for an equipment unit to be assigned to a motor pool](#) and [how to remove equipment units from a motor pool](#).

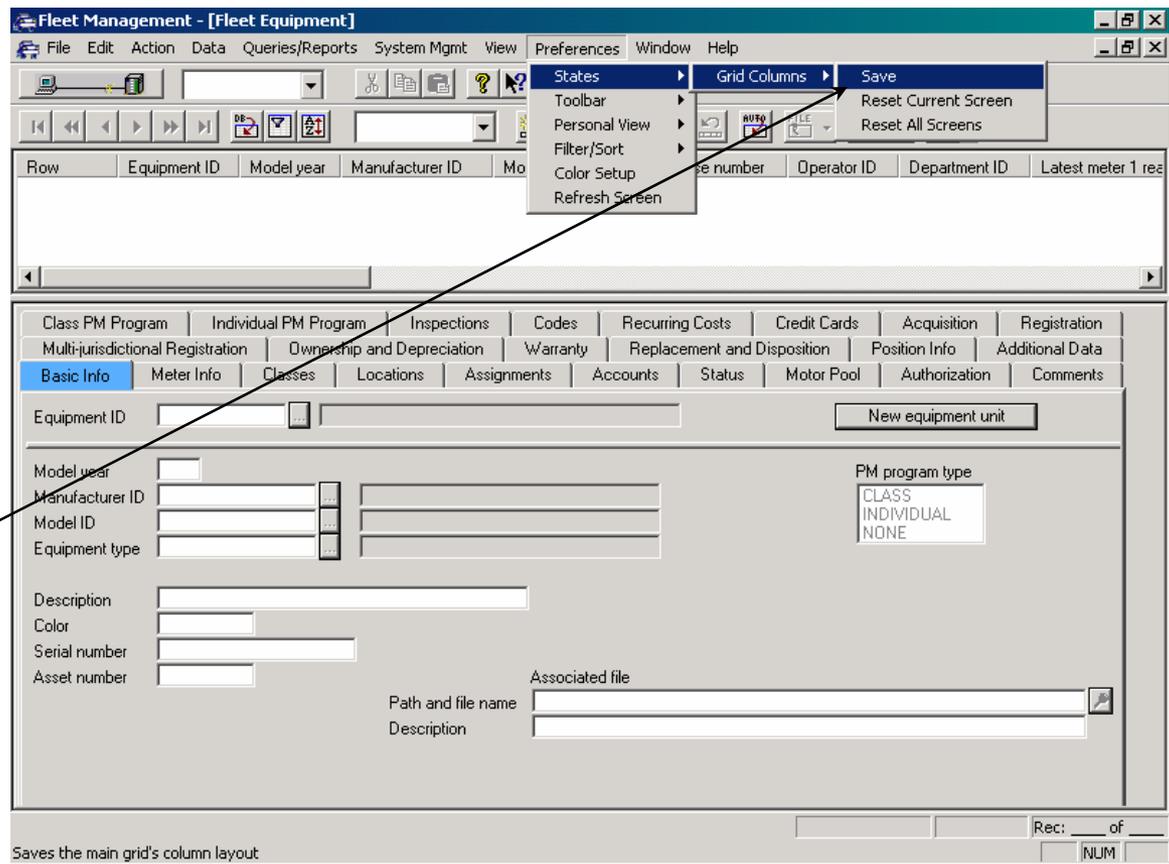
The **Fleet Equipment** screen consists of two sections, the [grid](#) (top) and the [tabs](#) (bottom). The tabs section contains tabs for:

Basic Info

Displays and defines identifying information about equipment units, including their ID, description, and ([preventive maintenance](#)) program type.

Saving Grid Columns

Preferences → *States* → *Grid Columns* → *Save*



1. On Any screen, drag the grid columns to be in the order you wish to see the data

2. Navigate to the path listed above and choose **Save** to save your settings.



Primary Vehicle Information

Section II



Section II Contents

Topic		Page
1.	Fleet Equipment	21
2.	Components	58
3.	Locations	70



Fleet Equipment – Basic Info

Data → Equipment Units → Fleet Equipment (Basic Info tab)

Highlighted fields are required upon insert.

- Equipment ID
- Model year
- Manufacturer ID
- Model ID
- Equipment type
- Description

The screenshot shows the 'FleetFocus - [Fleet Equipment]' application window. The 'Basic Info' tab is selected, and a 'New equipment unit' button is visible. The following fields are highlighted in yellow to indicate they are required for insertion:

- Equipment ID
- Model year
- Manufacturer ID
- Model ID
- Equipment type
- Description

The 'PM program type' dropdown menu is currently open, displaying the following options:

- CLASS
- INDIVIDUAL
- NONE

Other visible fields include: Color, Serial number, Asset number, Associated file (with sub-fields for Path and file name and Description), and a 'New equipment unit' button.



Fleet Equipment – Basic Info

State of Texas Required Fields

FleetFocus Field Name	State of Texas Required Data	Definition
Equipment ID	Agency Number	Three-digit state agency number as defined by the Texas Comptroller of Public Accounts. Enter as the first three digits of the Equipment ID
Equipment ID	Primary Location	Up to three digit location code for the facility, region, district, or section to which the vehicle is assigned. Enter as the fourth through sixth digits of the equipment ID. Enter as '000' if no location code is assigned.
Year	Year	Year in which vehicle was manufactured. Enter year as a four digit number.
Manufacturer	Make/Manufacturer	Vehicle manufacturer. Select manufacturer's name from choice list provided. Field will display only the first four letters of the manufacturer's name.
Model	Model	Vehicle model. Select model name from choice list provided.
Serial Number	Vehicle Identification Number (VIN)	Vehicle identification number as defined by the manufacturer. VIN should be provided in the vehicle's purchase materials and marked on the vehicle.



Fleet Equipment – Basic Info

State of Texas Required Fields

FleetFocus Field Name	State of Texas Required Data	Definition
Asset Number	SPA Number	State Property Accounting number. If you do not have access to SPA, you agency's property manager can provide this information. Enter SPA number as provided
PM Program Type	PM Program Type	Select one of the following three options as provided: Class – Select when standard maintenance will be provided on the vehicle Individual – Select when an agency specific PM schedule is being defined on the vehicle None – Select when no maintenance is required on the vehicle.
Equipment Type	Purpose	Vehicle's primary purpose. Select vehicle's primary purpose from choice list provided: Staff Transport Client Transport Materials Transport Law Enforcement Emergency Safety Construction Maintenance

Fleet Equipment – Meter Info

Data → Equipment Units → Fleet Equipment (Meter Info tab)

Highlighted fields are required upon insert.

When a **Meter Class** is selected the meter types for Meters 1 and 2 will automatically be displayed.

This tab tracks the latest meter readings for the equipment unit as well as meter history for the equipment unit. FASuite will manage meter roll-overs and meter resets/change outs.

Roll-overs are determined based on the Maximum meter value entered here. Be sure this is entered correctly for the equipment unit.

The **Life Total** at the bottom of the screen shows the total of all meters for the life of the vehicle.

The screenshot shows the 'FleetFocus - [Fleet Equipment]' application window. The 'Meter Info' tab is selected, displaying a form for entering meter data. The 'Equipment ID' field is highlighted in yellow. Below it, the 'Equipment class for meter types' dropdown is also highlighted. The 'Meter information' section contains two columns for 'Meter 1' and 'Meter 2'. The 'Maximum meter value' field for Meter 1 is highlighted in yellow and contains the value '999999'. The 'Life total' field at the bottom is also highlighted in yellow. A 'Meter resets' table is visible on the right side of the form.

Row	Delete	Date	Meter number	Reason	New me
*					



Fleet Equipment – Meter Info

State of Texas Required Fields

FleetFocus Field Name	State of Texas Required Data	Definition
Equipment class for meter types	Meter Type	Type of use tracked by the vehicle's odometer, calculated in either miles or hours. Select appropriate meter type from choice list provided: Miles Only - Meters miles only Hours Only - Meters hours only Miles/Hours - Primary meter is miles Hours/Miles - Primary meter is hours
Meter at Delivery	In-service Odometer	Enter odometer reading at time vehicle is entered into state service.
Latest meter reading	Odometer reading	System will update odometer reading as needed from work order center, fuel tickets and ending month odometer reading.
Latest meter date	Odometer reporting date	Date of last odometer reading. The application will fill this field automatically when a new meter reading is entered.



Fleet Equipment - Classes

Data → Equipment Units → Fleet Equipment (Classes tab)

Highlighted fields are required upon insert.

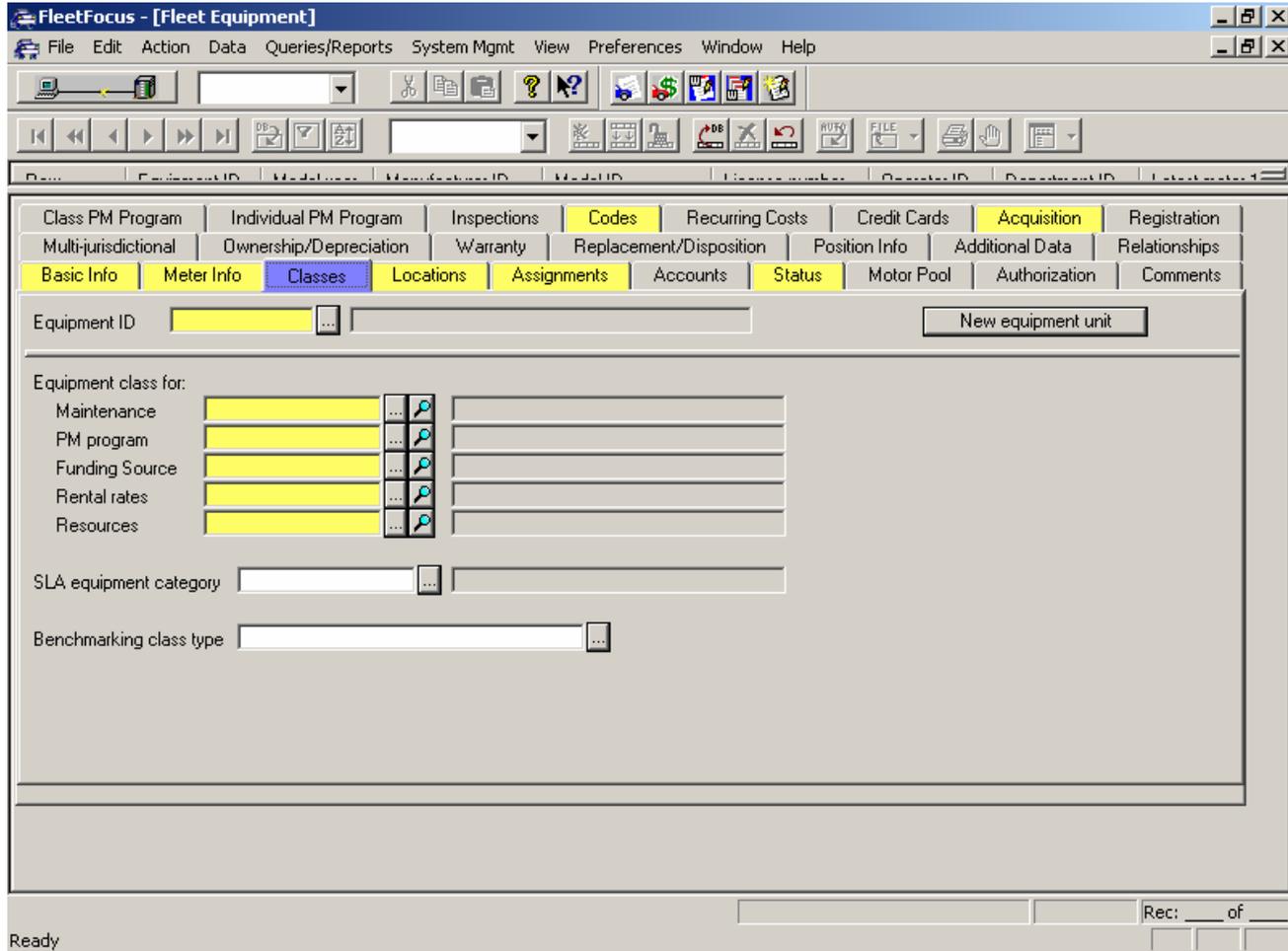
Maintenance Class – This class is used to compare equipment costs for like equipment units, and to define comeback ranges.

PM Program Class – This class tracks vehicles with like PM patterns and checklists.

Funding Source – This class identifies the type of funds used to procure the vehicle

Rental Rates Class – This class specifies the rates you charge for usage of the vehicle, especially on a long term rental.

Resources Class – This class specifies the parts, skills, bays, and tools required for each task. Skill, bay, and tool requirements are currently used only by the Shop Scheduling module.





Fleet Equipment - Classes

State of Texas Required Fields

FleetFocus Field Name	State of Texas Required Data	Definition
Equipment Class for Maintenance	Vehicle Class	Vehicle type as defined by SPA class codes. Select appropriate class code from choice list provided.
Equipment Class for PM Program	PM Schedule	Preventative maintenance schedule. Select PM schedule from choice list provided.
Funding Source	Procurement Funding Source	Source of funds for vehicle purchase. Select appropriate funding source from choice list provided.
Equipment Class for Rental Rates	Not Required by State of Texas	Select NONE from choice list provided
Equipment Class for Resources	Not Required by State of Texas	Select NONE from choice list provided

Fleet Equipment - Locations

Data → Equipment Units → Fleet Equipment (Locations tab)

Highlighted fields are required upon insert.

The screenshot shows the 'Fleet Management - [Fleet Equipment]' application window. The 'Locations' tab is selected, and the 'Assigned PM', 'Assigned repair', and 'Access rights' fields are highlighted in yellow. The 'New equipment unit' button is located at the top right of the form area. The status bar at the bottom indicates 'Ready'.

Assigned PM and Repair locations should be filled in if the vehicle is primarily serviced at a particular location.

Access Rights field must be filled with the correct agency location information to ensure you continue to have access to the vehicle's information.

Fleet Equipment - Assignments

Data → Equipment Units → Fleet Equipment (Assignments tab)

Highlighted fields are required upon insert.

If a vehicle is permanently assigned to an **Operator**, that information can be tracked on this tab.

FASuite also tracks the **Department** a vehicle is assigned to and which **Department to notify for PM**. If the vehicle is on temporary loan, that can be tracked as well.

The screenshot shows the 'FleetFocus - [Fleet Equipment]' application window. The 'Assignments' tab is selected in the main menu. The following fields are highlighted in yellow:

- Equipment ID
- Operator ID
- Department ID
- Department to notify for PM

Other visible fields include: Operator name, Allow Commute to Home, On temporary loan to department, Tax code ID, Company ID, Associated equipment ID, Agency Equipment ID, Fleet number, and Loan date. A table on the right side of the form has columns for Row, Delete, Operator ID, and Operator name.



Fleet Equipment - Assignments

State of Texas Required Fields

FleetFocus Field Name	State of Texas Required Data	Definition
Operator Name	Assignment Detail	Individual or group to which vehicle is assigned. If vehicle is assigned to an individual, enter operator's name and title. If vehicle is assigned to a division or program, enter group name.
Department ID	Assignment	Designates vehicle as assigned to an individual, group or motor pool. Select appropriate vehicle designation from choice list provided: M - Motorpool O - Assigned to Organization I - Assigned to Individual G - General Use
Department to Notify for PM	Department to Notify for PM	Select NM – Notify Maintenance for PM.
Agency Equipment ID	Agency Specific Equipment Number	Agency specific equipment number if unique from SPA, license plate or system equipment numbers. Enter agency specific equipment number if unique from SPA, license or system equipment numbers.
Allow Commute to Home	Commute to Home	Designation of vehicle to be used to commute to and from an employee's home. Check box if assigned user is authorized to use the vehicle to commute to and from his/her home.

Fleet Equipment - Status

Data → Equipment Units → Fleet Equipment (Status tab)

Highlighted fields are required upon insert.

The Life Cycle Status Code is required when creating a new Equipment Unit in FASuite. Change this ID to track the vehicle during its life cycle.

Note: Checking Ready for disposition will display a message on every work order opened for that vehicle noting that the equipment is about to be disposed.

The screenshot shows the 'Fleet Management - [Fleet Equipment]' application window. The 'Status' tab is selected in the 'Accounts' group. The 'Life cycle status code ID' field is highlighted in yellow. The 'Equipment status' dropdown menu is open, showing the following options: IN SERVICE, OUT OF SERVICE, AVAILABLE FOR PM, NOT FOUND, IN SHOP, WORK FINISHED, AWAITING TRANSFER - SHOP, and AWAITING TRANSFER - USER. The 'Ready for disposition' checkbox is checked. Other fields include 'Equipment ID', 'Status', 'Study code', 'User status 1-3', 'Cost center', 'Radio number', and 'Parking stall'. A 'New equipment unit' button is also present.



Fleet Equipment - Status

State of Texas Required Fields

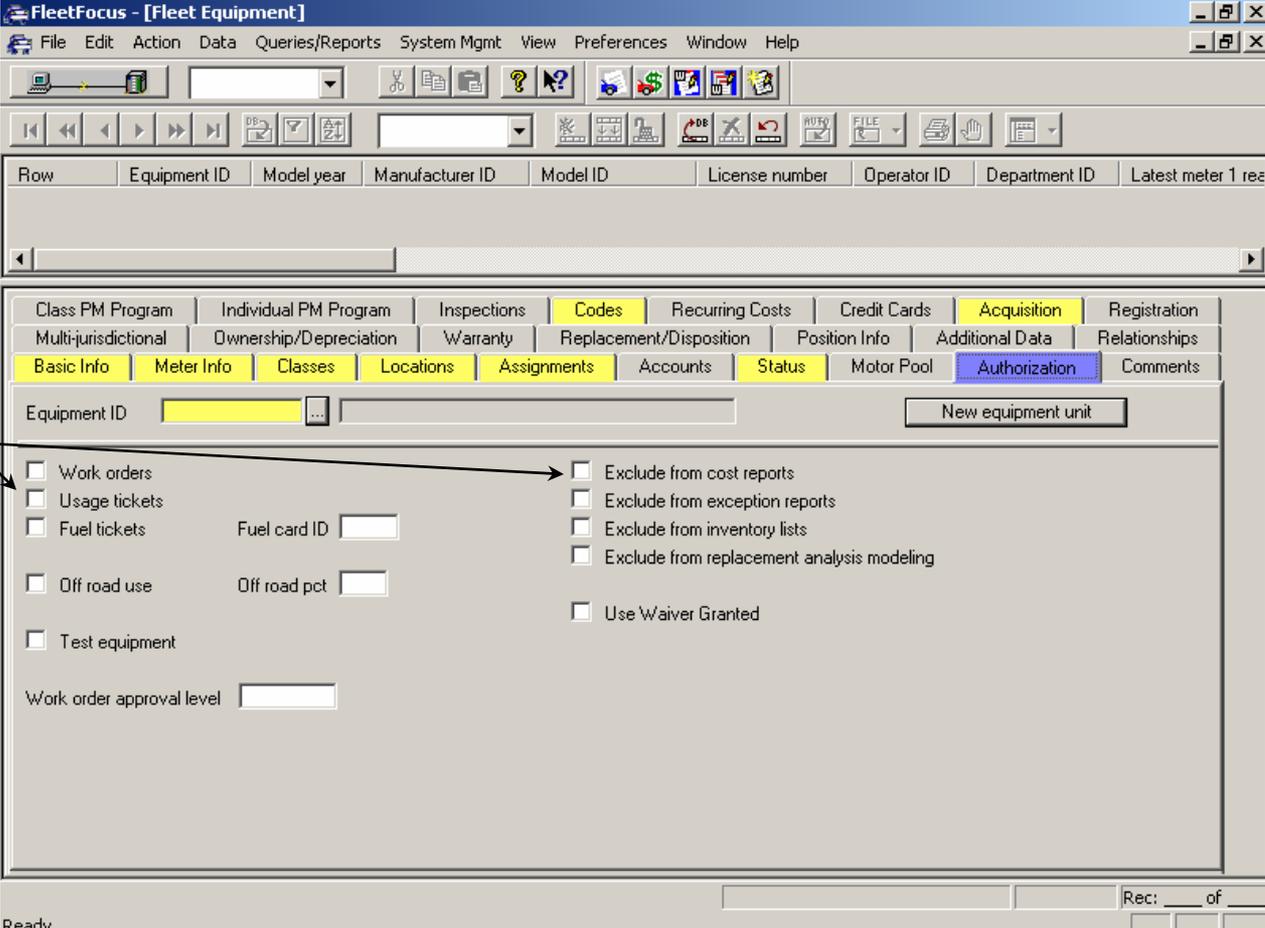
FleetFocus Field Name	State of Texas Required Data	Definition
Life Cycle Status Code	Life Cycle Status Code	Select appropriate vehicle designation from choice list provided: A – Active I - Inactive P – Pending Sale/Disposal R – Retired

Fleet Equipment - Authorization

Data → Equipment Units → Fleet Equipment (Authorization tab)

Highlighted fields are required upon insert.

Use this tab to authorize the vehicle for **Work orders, Usage tickets and/or Fuel tickets**. Once the vehicle is disposed, you can also choose to exclude the vehicle from various reports by checking the boxes on this tab.



The screenshot shows the 'FleetFocus - [Fleet Equipment]' application window. The 'Authorization' tab is selected, which is highlighted in blue. The form contains several sections:

- Navigation and Search:** A menu bar (File, Edit, Action, Data, Queries/Reports, System Mgmt, View, Preferences, Window, Help) and a toolbar with various icons.
- Data Grid:** A table with columns: Row, Equipment ID, Model year, Manufacturer ID, Model ID, License number, Operator ID, Department ID, Latest meter 1 rea.
- Form Tabs:** A row of tabs including Class PM Program, Individual PM Program, Inspections, Codes, Recurring Costs, Credit Cards, Acquisition, Registration, Multi-jurisdictional, Ownership/Depreciation, Warranty, Replacement/Disposition, Position Info, Additional Data, Relationships, Basic Info, Meter Info, Classes, Locations, Assignments, Accounts, Status, Motor Pool, Authorization, and Comments. The 'Authorization' tab is highlighted.
- Form Fields:**
 - Equipment ID: [Yellow highlighted text box]
 - New equipment unit: [Button]
 - Work orders:
 - Usage tickets:
 - Fuel tickets: Fuel card ID: [Text box]
 - Off road use: Off road pct: [Text box]
 - Test equipment:
 - Work order approval level: [Text box]
 - Exclude from cost reports:
 - Exclude from exception reports:
 - Exclude from inventory lists:
 - Exclude from replacement analysis modeling:
 - Use Waiver Granted:
- Status Bar:** Shows 'Ready' and 'Rec: ___ of ___'.

Fleet Equipment - Comments

Data → Equipment Units → Fleet Equipment (Comments tab)

Highlighted fields are required upon insert.

The **Comments** section on this tab can be used to track miscellaneous information about the equipment unit.

Any information entered in the **Messages** field will be displayed on every work order opened for that vehicle.

The screenshot displays the FleetFocus application window. At the top, there is a menu bar with options: File, Edit, Action, Data, Queries/Reports, System Mgmt, View, Preferences, Window, Help. Below the menu is a toolbar with various icons. A data grid is visible with columns: Row, Equipment ID, Model year, Manufacturer ID, Model ID, License number, Operator ID, Department ID, Latest meter 1 rea. The main area contains a tabbed interface with the following tabs: Class PM Program, Individual PM Program, Inspections, Codes, Recurring Costs, Credit Cards, Acquisition, Registration, Multi-jurisdictional, Ownership/Depreciation, Warranty, Replacement/Disposition, Position Info, Additional Data, Relationships, Basic Info, Meter Info, Classes, Locations, Assignments, Accounts, Status, Motor Pool, Authorization, and Comments. The 'Comments' tab is selected and highlighted. It features an 'Equipment ID' field with a dropdown arrow and a 'New equipment unit' button. Below this is a large 'Use Description' text area and a 'Messages' text area. The status bar at the bottom indicates 'Ready' and 'Rec: ___ of ___'.



Fleet Equipment - Comments

State of Texas Required Fields

FleetFocus Field Name	State of Texas Required Data	Definition
Use Description	Primary Purpose Narrative	Detailed description of the primary purpose of the vehicle, providing enough information to justify a need for the vehicle.

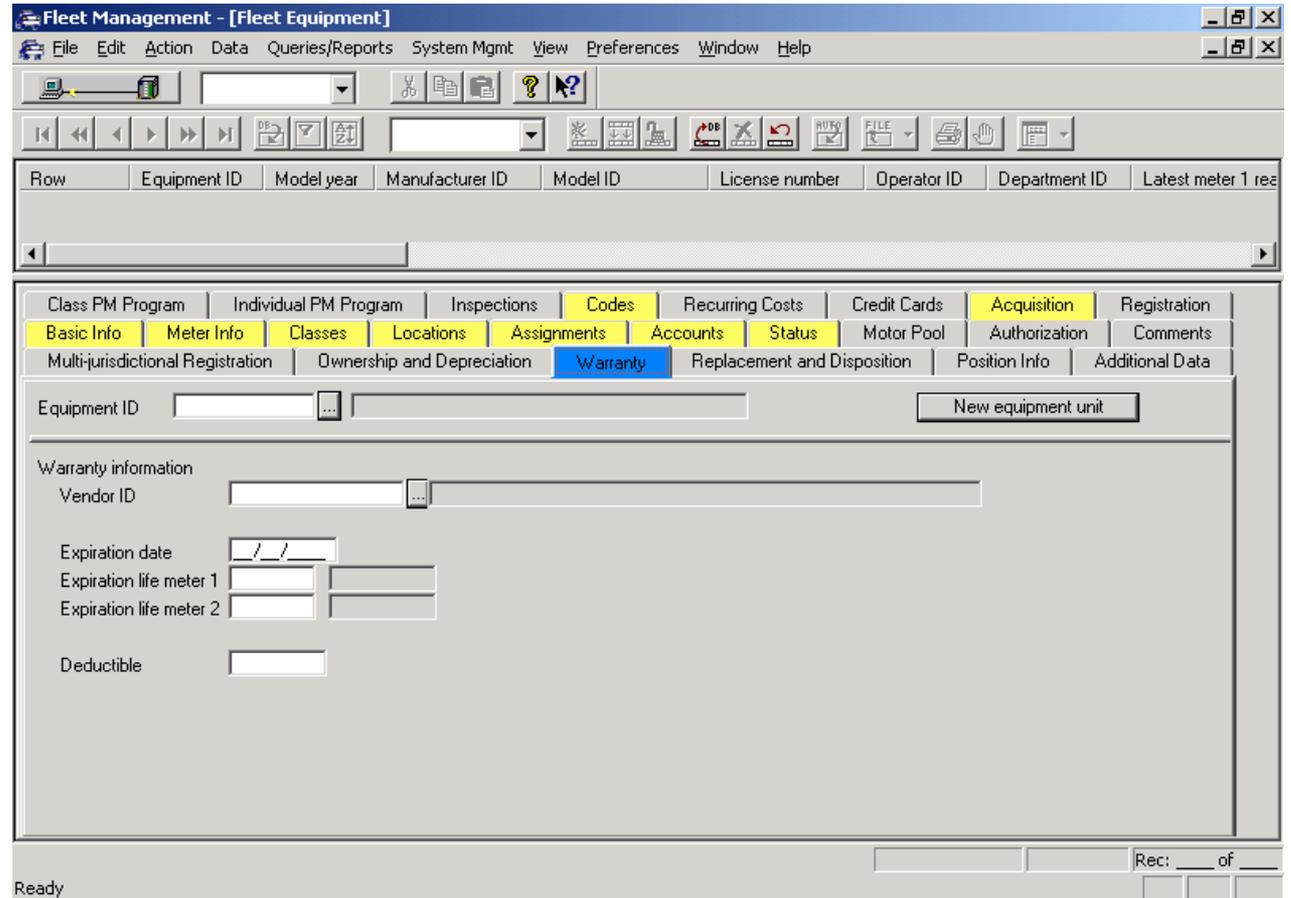
Fleet Equipment - Warranty

Data → Equipment Units → Fleet Equipment (Warranty tab)

Highlighted fields are required upon insert.

In order to track bumper to bumper warranty for a vehicle, the following fields on this tab must be completed:

- Vendor ID
- Expiration date
- Expiration life meter 1
- Expiration life meter 2 (optional)



The screenshot shows the 'Fleet Management - [Fleet Equipment]' application window. The 'Warranty' tab is selected in the bottom navigation bar. The 'Warranty information' section contains the following fields:

- Equipment ID: (highlighted)
- Vendor ID: (highlighted)
- Expiration date: (highlighted)
- Expiration life meter 1: (highlighted)
- Expiration life meter 2: (highlighted)
- Deductible: (highlighted)

A 'New equipment unit' button is located to the right of the Equipment ID field. The status bar at the bottom indicates 'Ready' and 'Rec: ___ of ___'.



Fleet Equipment - Warranty

State of Texas Required Fields

FleetFocus Field Name	State of Texas Required Data	Definition
Expiration Date	Warranty Expiration Date	Enter date vehicle warranty will expire. Include the cumulative warranty time if extended warranty purchased.
Expiration Life Meter 1	Warranty Expiration Meter	Enter mileage point triggering warranty expiration.



Fleet Equipment – Replacement and Disposition

Data → Equipment Units → Fleet Equipment (Replacement and Disposition tab)

Highlighted fields are required upon insert.

This tab is used to plan for equipment **replacement** and stores data concerning the vehicle's **disposition**.

The screenshot shows the FleetFocus software interface. The title bar reads "FleetFocus - [Fleet Equipment]". The menu bar includes File, Edit, Action, Data, Queries/Reports, System Mgmt, View, Preferences, Window, and Help. The toolbar contains various icons for file operations and data management. Below the toolbar is a grid with columns: Row, Equipment ID, Model year, Manufacturer ID, Model ID, License number, Operator ID, Department ID, and Latest meter 1 rec. The main window has a tabbed interface with the following tabs: Class PM Program, Individual PM Program, Inspections, Codes, Recurring Costs, Credit Cards, Acquisition, Registration, Basic Info, Meter Info, Classes, Locations, Assignments, Accounts, Status, Motor Pool, Authorization, Comments, Multi-jurisdictional, Ownership/Depreciation, Warranty, Replacement/Disposition (highlighted), Position Info, Additional Data, and Relationships. The "Replacement/Disposition" tab is active, showing a form with the following fields:

- Equipment ID: [Highlighted yellow text box]
- New equipment unit: [Button]
- Estimated replacement: [Text box]
- Planned retirement date: [Date field]
- Transferee name: [Text box]
- Month: [Text box]
- Retirement date: [Date field]
- Transferee address: [Text box]
- Year: [Text box]
- Disposition date: [Date field]
- Meter: [Text box]
- Sale price: [Text box]
- Cost: [Text box]
- Buyback code: [Text box]
- Disposal reason: [Text box]
- Code: [Text box]
- Disposal method: [Text box]
- Disposal authority: [Text box]
- Replaced by equipment ID: [Text box]
- Replaces equipment ID: [Text box]
- Net Disposal Value: [Text box]

At the bottom right, there is a status bar showing "Rec: ___ of ___" and "Ready".



Fleet Equipment – Replacement and Disposition

State of Texas Required Fields

FleetFocus Field Name	State of Texas Required Data	Definition
Planned Retirement Date	Replacement Schedule	Expected date of vehicle replacement based on State Vehicle Fleet Management Plan replacement guidelines. Enter the anticipated replacement date calculated by applying plan replacement guidelines to the vehicle in-service date.
Retirement Date	Out-of-Service Date	Date vehicle was permanently removed from agency service. Do not use this field to track vehicle down time for repair or other service.
Disposition Date	Disposal Date	Enter date vehicle was sold or ownership was transferred.
Sale Price	Disposal Price	Gross vehicle sale price or total value of other disposal methods. Enter dollar value of vehicle sale or disposal. Do not enter negative values.
Net Disposal Value	Net Disposal Value	Sale price less any incidental expenses related to the disposal process. Enter disposal value less any incidental expenses related to disposal.



Fleet Equipment – Additional Data

Data → Equipment Units → Fleet Equipment (Additional Data tab)

This tab is display only

This tab will display any optional features stored in the **Subsystems and Parts** section for this vehicle. Subsystems and Parts can be assigned to a vehicle based on Equipment ID, Equipment type, or Maintenance class.

The screenshot shows the 'Fleet Management - [Fleet Equipment]' application window. The menu bar includes File, Edit, Action, Data, Queries/Reports, System Mgmt, View, Preferences, Window, and Help. The toolbar contains various icons for navigation and data management. Below the toolbar is a table with columns: Row, Equipment ID, Model year, Manufacturer ID, Model ID, License number, Operator ID, Department ID, and Latest meter 1 rea. The main area features a tabbed interface with the following tabs: Class PM Program, Individual PM Program, Inspections, Codes, Recurring Costs, Credit Cards, Acquisition, Registration, Basic Info, Meter Info, Classes, Locations, Assignments, Accounts, Status, Motor Pool, Authorization, Comments, Multi-jurisdictional Registration, Ownership and Depreciation, Warranty, Replacement and Disposition, Position Info, and Additional Data (which is currently selected). Below the tabs, there is an 'Equipment ID' field with a dropdown arrow and a 'New equipment unit' button. A section titled 'Selected data from subsystems and parts' contains a table with columns: Row, Defined by, Subsystem, Property, and Description. The table currently shows a single row with an asterisk (*). The status bar at the bottom indicates 'Ready' and 'Rec: ___ of ___'.



Fleet Equipment – Class PM Program

Data → Equipment Units → Fleet Equipment (Class PM Program tab)

Highlighted fields are required upon insert.

When ready to manage standardized **PM Program**, a vehicle will be assigned to a PM Class. Before FASuite will begin tracking PMs, this tab needs to be completed with the following information:

- **Next PM service number**
- **Next PM due date**
- **Life meter at last PM**

These values initiate the PM schedule for this equipment unit.

The screenshot shows the 'Fleet Management - [Fleet Equipment]' application window. The menu bar includes File, Edit, Action, Data, Queries/Reports, System Mgmt, View, Preferences, Window, and Help. The toolbar contains various icons for navigation and data manipulation. Below the toolbar is a data grid with columns: Row, Equipment ID, Model year, Manufacturer ID, Model ID, License number, Operator ID, Department ID, and Latest meter 1 read. The main area is a tabbed interface with the following tabs: Basic Info, Meter Info, Classes, Locations, Assignments, Accounts, Status, Motor Pool, Authorization, Comments, Multi-jurisdictional Registration, Ownership and Depreciation, Warranty, Replacement and Disposition, Position Info, Additional Data, Class PM Program (selected), Individual PM Program, Inspections, Codes, Recurring Costs, Credit Cards, Acquisition, and Registration. The 'Class PM Program' tab is active, showing a form with the following fields: Equipment ID (with a dropdown arrow), Next PM service number, PM service, Next PM due date (with a date picker), Last performed, Meter 1, Meter 2, Fuel qty, PM overrides, Life meter at last PM, Next PM due at meter reading, and Quantity fuel used since last PM. A 'New equipment unit' button is located at the top right of the form area. The status bar at the bottom shows 'Ready' and 'Rec: ___ of ___'.



Fleet Equipment - Inspections

Data → Equipment Units → Fleet Equipment (Inspections tab)

Highlighted fields are required upon insert.

Each vehicle will have its annual inspection tracked on this tab in the Additional Inspections group field.

Fleet Management - [Fleet Equipment]

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

Row Equipment ID Model year Manufacturer ID Model ID License number Operator ID Department ID Latest meter 1 read

1	0102	1998	GMC	G2890		043	EQSVC	38123
---	------	------	-----	-------	--	-----	-------	-------

Multi-jurisdictional Registration Ownership and Depreciation Warranty Replacement and Disposition Position Info Additional Data

Basic Info Meter Info Classes Locations Assignments Accounts Status Motor Pool Authorization Comments

Class PM Program Individual PM Program **Inspections** Codes Recurring Costs Credit Cards Acquisition Registration

Equipment ID 0102 1998 GMC G2890 1997 GMC 4 YD DUMP TR New equipment unit

Next statutory inspection Inspection month NONE

Month Year Interval months

Additional inspections

Row	Delete	Inspection service	Last scheduled	Last performed	Next due	Interval (days)
*		M			06/01/2004	730
*		M		EMISSIONS TEST		

Ready

Rec: 1 of 1

To initialize Inspections:

1. In the **Additional Inspections** area select the **Inspection service(s)** that need to be performed on this unit.

2. For each service selected insert the following:

- Next due date
- Interval between inspections (in days)



Fleet Equipment - Codes

Data → Equipment Units → Fleet Equipment (Codes tab)

Highlighted fields are required upon insert.

Use this tab to track the **Fuel types** and Default priority for work performed on the vehicle.

The screenshot shows the FleetFocus software interface. The 'Codes' tab is selected and highlighted in blue. The 'Equipment ID' field is highlighted in yellow. The 'Fuel type 1' and 'Default priority ID for equipment unit on work orders' fields are also highlighted in yellow. The 'Quantity of tires' field is highlighted in light gray. The 'New equipment unit' button is visible on the right side of the form. The status bar at the bottom shows 'Ready' and 'Rec: ___ of ___'.



Fleet Equipment - Codes

State of Texas Required Fields

FleetFocus Field Name	State of Texas Required Data	Definition
Fuel Type 1	Primary Fuel Type	Primary fuel used to power the vehicle. Select appropriate fuel from choice list provided: BDL – Biodiesel CNG – Compressed Natural Gas DSL – Diesel ELE – Electricity ETH – Ethanol GAS – Gasoline LPG – Propane MTH - Methanol
Quantity of Tires	Number of Tires	Number of tires needed to operate vehicle. Number excludes any spare tires carried on the vehicle. Enter number of tires.



Fleet Equipment – Recurring Costs

Data → Equipment Units → Fleet Equipment (Recurring Costs tab)

Highlighted fields are required upon insert.

Any costs entered on this tab will be posted to the historical costs for the vehicle each time End of Month Processing is performed.

The screenshot shows the 'Fleet Management - [Fleet Equipment]' application window. The 'Recurring Costs' tab is selected in the bottom navigation bar. The main form area contains the following fields:

- Equipment ID: ...
- Fixed monthly cost:
- Fixed insurance cost:
- Fixed replacement cost:
- Fixed licensing cost:
- Other fixed cost 1:
- Other fixed cost 2:
- Other fixed cost 3:
- Insurance rate ID: ...

At the bottom right of the form, there is a 'Rec: ___ of ___' label and a 'New equipment unit' button. The status bar at the very bottom indicates 'Ready'.



Fleet Equipment – Credit Cards

Data → Equipment Units → Fleet Equipment (Credit Cards tab)

Highlighted fields are required upon insert.

This tab tracks Credit Card assignments for a vehicle. When a new credit card is entered, a new line is created in the group field.

The screenshot shows the 'Fleet Management - [Fleet Equipment]' application window. The 'Credit Cards' tab is selected and highlighted in blue. The interface includes a menu bar (File, Edit, Action, Data, Queries/Reports, System Mgmt, View, Preferences, Window, Help), a toolbar with various icons, and a data grid with columns: Row, Equipment ID, Model year, Manufacturer ID, Model ID, License number, Operator ID, Department ID, Latest meter 1 rec. Below the grid is a tabbed interface with the following tabs: Basic Info, Meter Info, Classes, Locations, Assignments, Accounts, Status, Motor Pool, Authorization, Comments, Multi-jurisdictional Registration, Ownership and Depreciation, Warranty, Replacement and Disposition, Position Info, Additional Data, Class PM Program, Individual PM Program, Inspections, Codes, Recurring Costs, Credit Cards (highlighted), Acquisition, and Registration. An 'Equipment ID' field with a dropdown arrow and a 'New equipment unit' button are visible. At the bottom, there is a table with columns: Row, Delete, Issuing company, Card number, Issue date, and Expiration date. The status bar at the bottom left shows 'Ready' and the bottom right shows 'Rec: ___ of ___'.

Fleet Equipment - Acquisition

Data → Equipment Units → Fleet Equipment (Acquisition tab)

Highlighted fields are required upon insert.

This tab tracks the acquisition of the vehicle. The **Actual delivery date** and **Actual in service date** are required for active vehicles.

In order to have FASuite automatically calculate depreciation, the **Original cost** and **Capitalized value** (if applicable) must be entered on this tab (see FASuite Help for depreciation calculation definition).

Fleet Management - [Fleet Equipment]

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

Row Equipment ID Model year Manufacturer ID Model ID License number Operator ID Department ID Latest meter 1 rec

Basic Info Meter Info Classes Locations Assignments Accounts Status Motor Pool Authorization Comments
 Multi-jurisdictional Registration Ownership and Depreciation Warranty Replacement and Disposition Position Info Additional Data
 Class PM Program Individual PM Program Inspections Codes Recurring Costs Credit Cards Acquisition Registration

Equipment ID

	Planned	Actual
Delivery date	<input type="text" value="//"/>	<input type="text" value="//"/>
In service date	<input type="text" value="//"/>	<input type="text" value="//"/>
Original cost	<input type="text"/>	
Base MRP cost	<input type="text"/>	
Capitalized value	<input type="text"/>	
Date capitalized	<input type="text" value="//"/>	
Outfitting cost	<input type="text"/>	
Outfitting level	<input type="text"/>	

Row	Delete	Vendor ID	Purchase order number	Order date
*				

Authorization ID Shipping cost
 Title Duty cost
 VAT cost
 Capitalized cost posted recently

Ready



Fleet Equipment - Acquisition

State of Texas Required Fields

FleetFocus Field Name	State of Texas Required Data	Definition
Original Cost	Acquisition Cost	Original cost to acquire vehicle. Cost excludes components or add-ons not part of the original purchase agreement. Cost of transferred vehicles is the book value carried in SPA. Enter dollar value of acquisition.
In Service Date - Actual	In-service Date	Enter date vehicle entered into use for agency operations.
Delivery Date - Actual	Acquisition Date	Date vehicle was accepted or received. For new vehicles, enter date vehicle was accepted or received. For transferred vehicles, enter date vehicle was delivered.
Outfitting Cost	Added Equipment Cost	After market vehicle additions, such as tool boxes, cargo racks, light bars, radios, etc. Enter total dollar value of all equipment added to vehicle.
Capitalized Value	Capitalized Value	Total cost of vehicle (new or transferred) including conversions, components, and/or add-ons affixed to the vehicle. Enter dollar amount of vehicle's capitalized value.



Fleet Equipment - Registration

Data → Equipment Units → Fleet Equipment (Registration tab)

Highlighted fields are required upon insert.

This tab tracks registration information for the vehicle.

The screenshot shows the 'Fleet Management - [Fleet Equipment]' application window. The menu bar includes File, Edit, Action, Data, Queries/Reports, System Mgmt, View, Preferences, Window, and Help. The toolbar contains various icons for navigation and data management. Below the toolbar is a table with columns: Row, Equipment ID, Model year, Manufacturer ID, Model ID, License number, Operator ID, Department ID, and Latest meter 1 rec. The main area features a tabbed interface with the following tabs: Basic Info, Meter Info, Classes, Locations, Assignments, Accounts, Status, Motor Pool, Authorization, Comments, Multi-jurisdictional Registration, Ownership and Depreciation, Warranty, Replacement and Disposition, Position Info, Additional Data, Class PM Program, Individual PM Program, Inspections, Codes, Recurring Costs, Credit Cards, Acquisition, and Registration. The 'Registration' tab is currently selected and highlighted in blue. It contains a form with the following fields: Equipment ID (with a dropdown arrow and a 'New equipment unit' button), License number, Issuing government, License number 2, Original registration date, Registration expiration date, Date of permission to operate on roads, Certificate of roadworthiness number, Date of certificate of roadworthiness, and Restricted area pass number. The status bar at the bottom shows 'Ready' and 'Rec: ___ of ___'.



Fleet Equipment - Registration

State of Texas Required Fields

FleetFocus Field Name	State of Texas Required Data	Definition
License Number	License Plate Number	License plate number as listed on vehicle registration. Enter license plate number as provided.



Fleet Equipment – Ownership/Depreciation

Data → Equipment Units → Fleet Equipment (Ownership/Depreciation tab)

Highlighted fields are required upon insert.

This tab tracks ownership and depreciation information for the vehicle.

The screenshot shows the 'FleetFocus - [Fleet Equipment]' application window. The 'Ownership/Depreciation' tab is selected in the top navigation bar. The main form contains the following fields and options:

- Equipment ID:** A text input field with a search icon.
- Depreciation method:** A dropdown menu with options: STRAIGHT LINE, SUM OF YEARS DIGITS, CANADIAN DECLINING, BRITISH DECLINING, NONE.
- Ownership:** A dropdown menu with options: OWNED, LEASED, CUSTOMER.
- Leased unit:** A section containing:
 - Lease ID: A text input field with a search icon.
 - Monthly rent: A text input field.
 - Lease expiration date: A date input field (format: / /).
 - Residual value: A text input field.
- Depreciation section:** A group of text input fields for:
 - Life months
 - Months remaining
 - Salvage value
 - Salvage value pct
 - Current declining balance

At the bottom right of the window, there is a status bar showing 'Ready' and 'Rec: ___ of ___'.



Fleet Equipment – Ownership/Depreciation

State of Texas Required Fields

FleetFocus Field Name	State of Texas Required Data	Definition
Depreciation Method	Depreciation Rate	Rate at which vehicle's value will be depreciated. Select straight line depreciation from choice list provided.
Salvage Value	Current Book Value	Book value of vehicle as carried in SPA system. Enter book value as carried in SPA System at time of disposal.



Fleet Equipment – Wizard

Data → Equipment Units → Fleet Equipment

The screenshot shows the 'Fleet Management - [Fleet Equipment]' application window. The interface includes a menu bar (File, Edit, Action, Data, Queries/Reports, System Mgmt, View, Preferences, Window, Help), a toolbar with various icons, and a data table with columns: Row, Equipment ID, Model year, Manufacturer ID, Model ID, License number, Operator ID, Department ID, and Latest meter 1 rea. Below the table is a navigation pane with categories like Class PM Program, Individual PM Program, Inspections, Codes, Recurring Costs, Credit Cards, Acquisition, Registration, Multi-jurisdictional Registration, Ownership and Depreciation, Warranty, Replacement and Disposition, Position Info, Additional Data, Basic Info, Meter Info, Classes, Locations, Assignments, Accounts, Status, Motor Pool, Authorization, and Comments. The main form area contains fields for Equipment ID, Model year, Man ID, Model ID, Equipment type, Description, Color, Serial number, Asset number, PM program type (CLASS, INDIVIDUAL, NONE), Associated file (Path and file name, Description), and a 'New equipment unit' button. An arrow points from the text 'Click on the New equipment unit button.' to this button.

Click on the **New equipment unit** button.

Fleet Equipment – Wizard

Data → *Equipment Units* → *Fleet Equipment*

FASuite will guide you through a series of dialog boxes that let you quickly enter required information and create a new record. After you complete the Wizard, the Fleet Equipment screen validates the data by placing the information in the appropriate fields and displays them before processing. This allows you to add additional information as required.

Add New Equipment Unit Wizard - Basic Information

Cancel Prev Next

Basic Information:

Equipment ID

Model Year

Manufacturer

Model

Equipment Type

Description

VIN/Serial Number

Add New Equipment Unit Wizard - Class Information

Cancel Prev Next

Equipment Classes:

Maintenance Class

PM Class

Meter Class

Rental Rate Class

Standards Class

Resources Class

Fleet Equipment – De-Activating Equipment

Data → Equipment Units → Fleet Equipment (Authorization tab)

1. Use the **Filter** to limit the display to the equipment ID you want.

2. Click **Unlock**.

3. Uncheck the following boxes:

- **Work orders**
- **Usage Tickets**
- **Fuel Tickets**

4. Check the following “Exclude from” boxes:

- **Cost reports**
- **Exception reports**
- **Inventory Lists**

NOTE: When you change the Life cycle status code ID (on the Status tab) from “active” to not “active”, FASuite will automatically check the Exclude from inventory lists box for you.

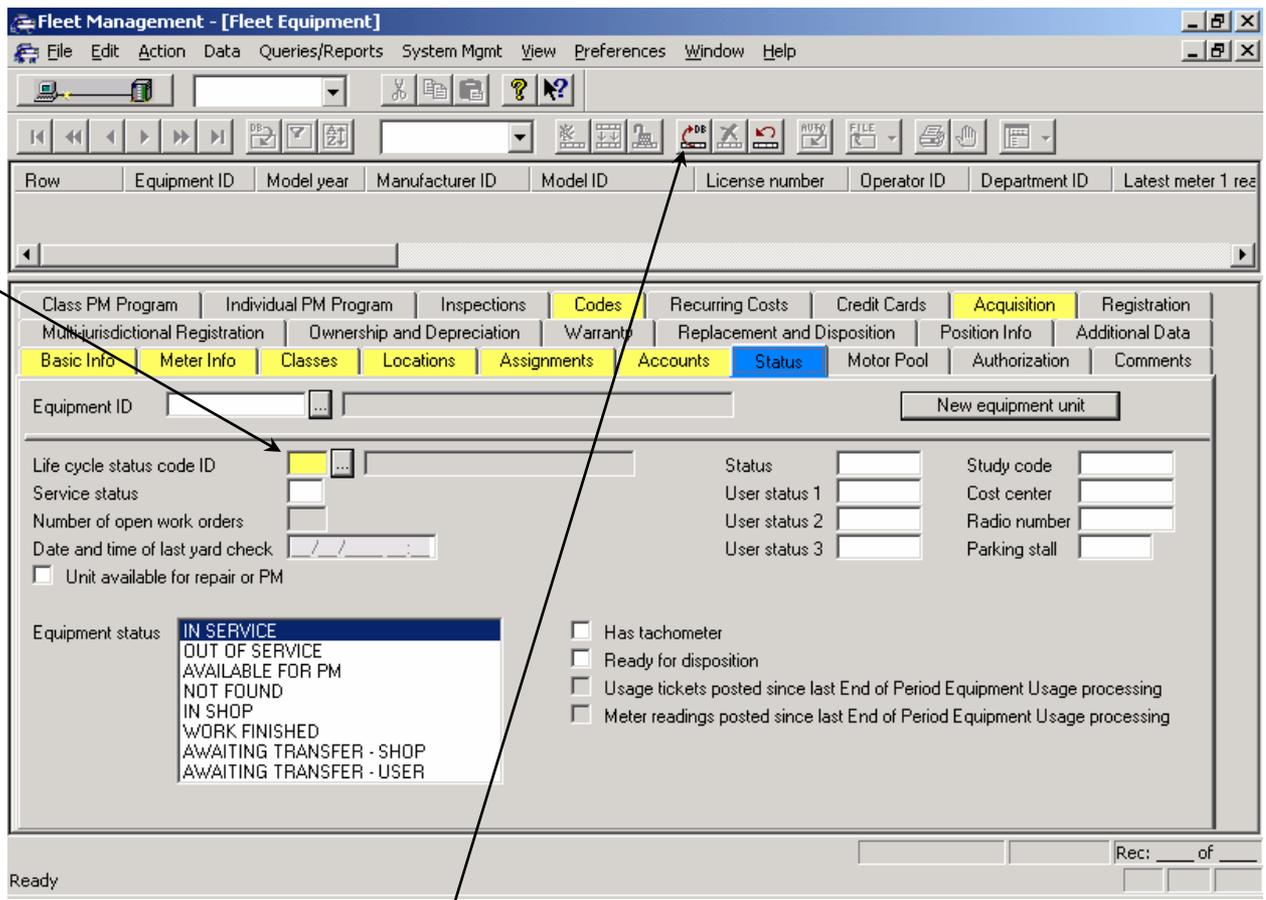
The screenshot shows the 'Fleet Management - [Fleet Equipment]' window. The 'Authorization' tab is selected. The 'Equipment ID' field is empty. The 'Work orders', 'Usage tickets', and 'Fuel tickets' checkboxes are unchecked. The 'Exclude from cost reports', 'Exclude from exception reports', 'Exclude from inventory lists', and 'Exclude from replacement analysis modeling' checkboxes are checked. The 'Fuel card ID' field is empty. The 'Off road use' checkbox is unchecked. The 'Test equipment' checkbox is unchecked. The 'Work order approval level' field is empty. The 'New equipment unit' button is visible. The status bar at the bottom shows 'Ready'.

Fleet Equipment – De-Activating Equipment (continued)

Data → Equipment Units → Fleet Equipment (Status tab)

4. Enter a **Life cycle status code ID** field to de-activate the equipment unit.

Changing to a life cycle code that is not active frees up one active equipment license and ensures that no work orders, fuel tickets or usage tickets can be posted against that unit.



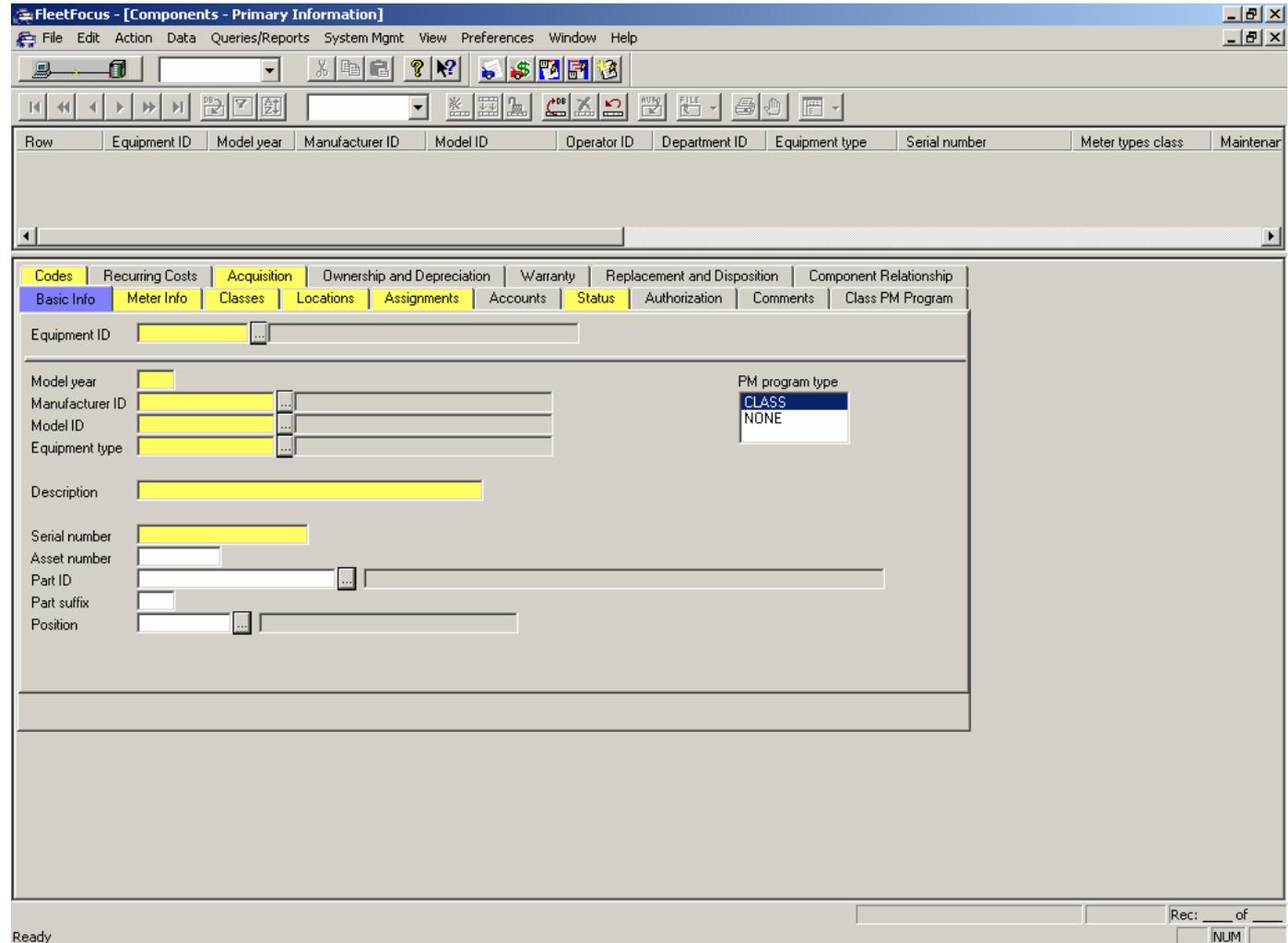
5. Click the Process button.

Components

Data → *Equipment Units* → *Component* → *Primary Information*

Should this item be a Component?

- The item has its own identification measures such as a serial number or meter
- You want to track information and costs about the item separately
- The item **may or may not** be attached to or associated with an equipment unit
- The item does not have any licensing or registration





Components – Basic Info

Data → Equipment Units → Component → Primary Information (Basic Info tab)

Highlighted fields are required upon insert.

- Equipment ID
- Model year
- Manufacturer ID
- Model ID
- Equipment type
- Description

The screenshot shows the 'FleetFocus - [Components - Primary Information]' window. The 'Basic Info' tab is selected, and the following fields are highlighted in yellow: Equipment ID, Model year, Manufacturer ID, Model ID, Equipment type, and Description. A dropdown menu for 'PM program type' is open, showing 'CLASS' and 'NONE' options. The status bar at the bottom indicates 'Ready' and 'Rec: ___ of ___'.

Components – Meter Info

Data → *Equipment Units* → *Component* → *Primary Information (Meter Info tab)*

Highlighted fields are required upon insert.

When a **Meter Class** is selected the meter type for Meters 1 will automatically be displayed.

This tab tracks the latest meter reading for the component as well as meter history for the component. FASuite will manage meter roll-overs and meter resets/change outs.

Roll-overs are determined based on the Maximum meter value entered here. Be sure this is entered correctly for the component.

The **Life Total** at the bottom of the screen shows the total for the life of the vehicle.

The screenshot shows the 'FleetFocus - [Components - Primary Information]' window. The 'Meter Info' tab is selected, displaying various input fields and a table. The 'Equipment ID' field is highlighted in yellow. Below it, the 'Equipment class for meter types' field is also highlighted. The 'Meter information' section for 'Meter 1' includes fields for 'Meter at delivery', 'Latest meter reading', 'Latest meter source', 'Latest meter date', and 'Maximum meter value'. The 'Maximum meter value' field is highlighted in yellow and has a dropdown menu with values 999999, 99999, 9999, and 999. The 'Life total' field is highlighted in yellow. On the right, there is a 'Meter resets' table with columns: Row, Delete, Date, Meter number, Reason, and New me. The table contains one row with an asterisk (*). The status bar at the bottom shows 'Ready' and 'Rec: ___ of ___ NUM'.



Components - Classes

Data → *Equipment Units* → *Component* → *Primary Information (Classes tab)*

Highlighted fields are required upon insert.

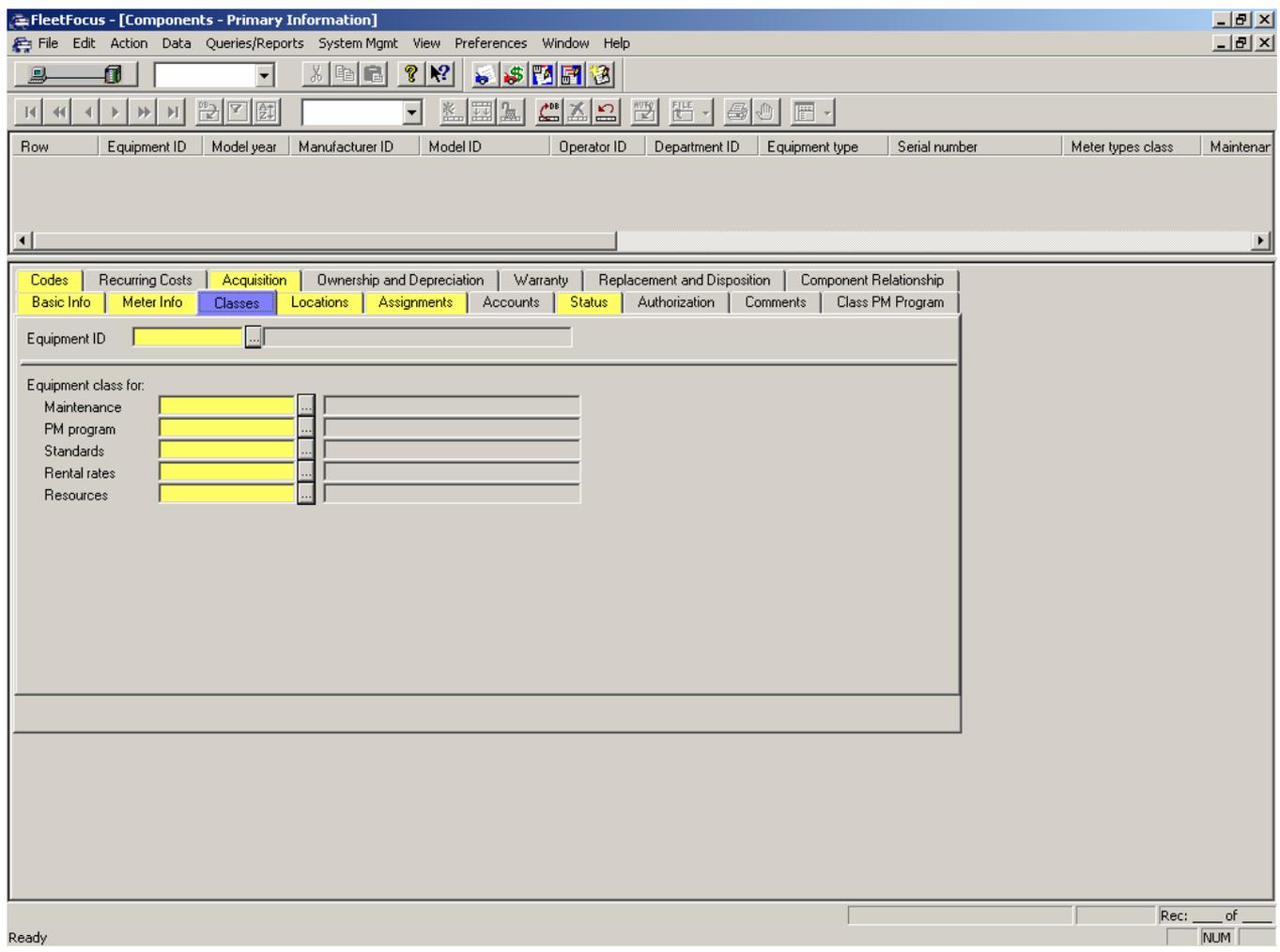
Maintenance Class – This class is used to compare costs for like equipment, and to define comeback ranges.

PM Program Class – This class tracks components with like PM patterns and checklists.

Funding Source – This class identifies the type of funds used to procure the component.

Rental Rates Class – This class specifies the rates you charge for usage of the component, especially on a long term rental.

Resources Class – This class specifies the parts, skills, bays, and tools required for each task. Skill, bay, and tool requirements are currently used only by the Shop Scheduling module.





Components - Locations

Data → Equipment Units → Component → Primary Information (Locations tab)

Highlighted fields are required upon insert.

Assigned PM and Repair locations should be filled in if the component is primarily serviced at a particular location.

The screenshot shows the 'FleetFocus - [Components - Primary Information]' window. The 'Locations' tab is selected and highlighted in blue. The 'Assigned PM location ID' and 'Assigned repair location ID' fields are highlighted in yellow. The 'Preferred PM shift' field is also highlighted in yellow. The 'Station location ID', 'Stored location ID', 'Current location ID', 'Last fuel location ID', and 'Access rights location ID' fields are white. The 'Equipment ID' field is also highlighted in yellow. The 'Rec: ___ of ___' and 'NUM' fields are visible at the bottom right of the window.



Components - Assignments

Data → Equipment Units → Component → Primary Information (Assignments tab)

Highlighted fields are required upon insert.

If a component is permanently assigned to an **Operator**, that information can be tracked on this tab.

FASuite also tracks the **Department** a component is assigned to and which **Department to notify for PM**.

The screenshot shows the 'FleetFocus - [Components - Primary Information]' window. The 'Assignments' tab is selected, showing fields for Equipment ID, Operator ID, Operator name, Department ID, Department to notify for PM, Tax code ID, Company ID, Associated equipment ID, Associated file, Path and file name, and Description. The Equipment ID, Department ID, and Department to notify for PM fields are highlighted in yellow. The interface includes a menu bar, a toolbar, and a data grid at the top.



Components - Status

Data → Equipment Units → Components → Primary Information (Status tab)

Highlighted fields are required upon insert.

The Life Cycle Status Code is required when creating a new Component in FASuite. Change this ID to track the component during its life cycle.

Note: Checking Ready for disposition will display a message on every work order opened for that component noting that it is about to be disposed.

The screenshot shows the 'FleetFocus - [Components - Primary Information]' window. The 'Status' tab is active. The 'Equipment ID' field is highlighted in yellow. Below it, the 'Life cycle status code ID' field is also highlighted in yellow. A dropdown menu for 'Equipment status' is open, showing options: IN SERVICE, OUT OF SERVICE, AVAILABLE FOR PM, NOT FOUND, IN SHOP, WORK FINISHED, AWAITING TRANSFER - SHOP, and AWAITING TRANSFER - USER. To the right, there are three checkboxes: 'Ready for disposition', 'Usage tickets posted since last End of Period Equipment Usage processing', and 'Meter readings posted since last End of Period Equipment Usage processing'. The 'Status' field is set to 'Status' and the 'Cost center' field is empty.



Components - Authorization

Data → Equipment Units → Components → Primary Information (Authorization tab)

Highlighted fields are required upon insert.

Use this tab to authorize the component for **Work orders**, **Usage tickets** and/or **Fuel tickets**. Once the component is disposed, you can also choose to exclude the component from various reports by checking the boxes on this tab.



Components – Class PM Program

Data → Equipment Units → Components → Primary Information (Class PM Program tab)

Highlighted fields are required upon insert.

When ready to manage standardized **PM Program**, a component will be assigned to a PM Class. Before FASuite will begin tracking PMs, this tab needs to be completed with the following information:

- **Next PM service number**
- **Next PM due date**
- **Life meter at last PM**

These values initiate the PM schedule for this component.

The screenshot shows the 'Class PM Program' tab in the FleetFocus software. The 'Equipment ID' field is highlighted in yellow. Below it, the 'Next PM service number' field is also highlighted in yellow. Other fields include 'PM service', 'Next PM due date', 'Last performed', 'PM overrides', 'Life meter at last PM', 'Next PM due at meter reading', and 'Quantity fuel used since last PM'. There are also columns for 'Meter 1' and 'Fuel qty'.



Components - Codes

Data → Equipment Units → Components → Primary Information (Codes tab)

Highlighted fields are required upon insert.

Use this tab to track the **Fuel types** and Default priority for work performed on the vehicle.

The screenshot shows the 'FleetFocus - [Components - Primary Information]' window. The 'Codes' tab is selected. The 'Equipment ID' field is highlighted in yellow. Below it are fields for 'Fuel type 1', 'Fuel type 2', and 'BT type', each with a dropdown menu. A 'Billing code' checkbox is also present. The 'Default priority ID for equipment unit on work orders' field is also highlighted in yellow. The status bar at the bottom shows 'Ready' and 'Rec: ___ of ___ NUM'.



Components - Acquisition

Data → Equipment Units → Components → Primary Information (Acquisition tab)

Highlighted fields are required upon insert.

This tab tracks the **acquisition** of the component. The **Actual delivery date** and **Actual in service date** are required for active components.

In order to have FASuite automatically calculate depreciation, the **Original cost** and **Capitalized value** (if applicable) must be entered on this tab (see FASuite Help for depreciation calculation definition).

The screenshot shows the 'FleetFocus - [Components - Primary Information]' window. The 'Acquisition' tab is selected, showing the following fields and table:

- Equipment ID: []
- Planned Delivery date: [/ /]
- Actual Delivery date: [/ /]
- Planned In service date: [/ /]
- Actual In service date: [/ /]
- Original cost: []
- Capitalized value: []
- Date capitalized: [/ /]
- Authorization ID: []
- Title: []
- Shipping cost: []
- Duty cost: []
- VAT cost: []
- Capitalized cost posted recently

Row	Delete	Vendor ID	Purchase order number	Order date
*				



Components - Warranty

Data → Equipment Units → Components → Primary Information (Warranty tab)

Highlighted fields are required upon insert.

In order to track bumper to bumper warranty for a component, the following fields on this tab must be completed:

- Vendor ID
- Expiration date
- Expiration life meter 1

The screenshot shows the FleetFocus application window titled "FleetFocus - [Components - Primary Information]". The menu bar includes File, Edit, Action, Data, Queries/Reports, System Mgmt, View, Preferences, Window, and Help. The toolbar contains various icons for file operations and navigation. Below the toolbar is a grid header with columns: Row, Equipment ID, Model year, Manufacturer ID, Model ID, Operator ID, Department ID, Equipment type, Serial number, Meter types class, and Maintenan. The main content area has several tabs: Basic Info, Meter Info, Classes, Locations, Assignments, Accounts, Status, Authorization, Comments, Class PM Program, Codes, Recurring Costs, Acquisition, Ownership and Depreciation, Warranty (highlighted in blue), Replacement and Disposition, and Component Relationship. The Warranty tab contains the following fields: Equipment ID (highlighted in yellow), Warranty information section with Vendor ID, Expiration date (with a date picker), Expiration meter 1, and Deductible. The status bar at the bottom shows "Ready" and "Rec: ___ of ___ NUM".



Locations

Data → Setup → Organizational Setup → Locations

FleetFocus - [Locations]

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

Row Location ID Name Contact name Address line 1 Address line 2 Add

1	303000	TX BLDG & PROCUREMENT	LEA ANNE BARTEE	1711 SAN JACINTO BLVD. RM# 112	AUSTIN	TX
---	--------	-----------------------	-----------------	--------------------------------	--------	----

Motor Pool Rates and Markups Roll-ups Work Calendar Message Printer

Basic Info Functions Work Orders Work Orders - More Info Inventory Inventory - More Info

Location ID: 303000 TX BLDG & PROCUREMENT

Name: TX BLDG & PROCUREMENT County: TRAVIS

Contact name: LEA ANNE BARTEE Tax code:

Address: 1711 SAN JACINTO BLVD. RM# 112
AUSTIN
TX
78701-1416

Email address:

Phone: 512-463-8174
Fax: 512-463-3400

Ready Rec: 1 of 1 NUM

Windows taskbar: Start | Texas | Re: State of ... | Microsoft Powe... | FleetFocus - [... | Document1 - Mi... | 12:55 PM



Locations – Basic Info

Data → Setup → Organizational Setup → Locations (Basic Info tab)

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

Row	Location ID	Name	Contact name	Address line 1	Address line 2	Address line 3
1	303000	TX BLDG & PROCUREMENT	LEA ANNE BARTEE	1711 SAN JACINTO BLVD. RM# 112	AUSTIN	TX

Below the table is a detailed form for the selected location. The form includes the following fields:

- Location ID: 303000
- Name: TX BLDG & PROCUREMENT
- County: TRAVIS
- Contact name: LEA ANNE BARTEE
- Tax code: (empty)
- Address: 1711 SAN JACINTO BLVD. RM# 112, AUSTIN, TX, 78701-1416
- Email address: (empty)
- Phone: 512-463-8174
- Fax: 512-463-3400

The bottom of the window shows a taskbar with the Start button and several open applications: Texas, Re: State of ..., Microsoft Powe..., FleetFocus - [...], Document1 - Mi..., and a system tray with the time 12:55 PM.

When entering a new location, be sure to enter as much information as possible.

Location ID must be a unique value and the **Name** field is also required.



Locations – Basic Info

State of Texas Required Fields

FleetFocus Field Name	State of Texas Required Data	Definition
Address – Line 1	Street Address	Enter the street address
Address – Line 2	City	Enter the city
Address – Line 3	State	Enter the state
Address – Line 4	Zip	Enter the zip code



Locations – Functions

Data → *Setup* → *Organizational Setup* → *Locations (Functions tab)*

Specify the function this location will serve. The function(s) specified will dictate fields on other tabs that will also need to be completed.

The screenshot shows the FleetFocus - [Locations] application window. The main window displays a table with the following data:

Row	Location ID	Name	Contact name	Address line 1	Address line 2	Add
1	303000	TX BLDG & PROCUREMENT	LEA ANNE BARTEE	1711 SAN JACINTO BLVD. RM# 112	AUSTIN	TX

Below the table, the 'Functions' tab is selected. The 'Location ID' is 303000 and the 'Name' is TX BLDG & PROCUREMENT. The following functions are checked:

- Shop (regular)
- Shop (mobile)
- Shop (external)
- Equipment site
- Station

Other functions listed but not checked include: Shop scheduling active, Operations, Fueling site, Parts inventory, Pool (dispatch), and Test.

The status bar at the bottom shows 'Ready' and 'Rec: 1 of 1'.



Subsystems - Parts - Specifications

Section III



Section III Contents

Topic		Page
1.	Subsystems and Parts	77
2.	Specifications	81
3.	Adding a New Part	89
4.	Parts Primary	90
5.	Parts Location	92
6.	Parts Inventory Adjustments	96
7.	Vendor/Part Information	97
8.	Parts Cross-references	99



Subsystems and Parts - Overview

Data → *Equipment Units* → *Subsystems and Parts*

An equipment unit or equipment type may have many subsystems such as body, engine, transmission, fuel, air, brakes, etc. Typically, subsystems have their own identification measures such as a serial number or meter, and are fixed (cannot be moved from one equipment unit to another). You usually do not want to track information about them separately from the equipment unit of which they are a part.

The purpose of the Subsystems and Parts screen is to assign subsystems and parts to equipment types and equipment units, and to define the properties (elements) that the subsystems consist of.

EXAMPLE: You can define a fuel system as a subsystem of equipment type diesel bus (or of equipment unit #001). You can then define parts for the subsystem, such as fuel filter, fuel pump, fuel cap, fuel key number, etc.

Remember, much of the information about a vehicle is equipment type specific. Enter general information once for an equipment type instead of entering it for each vehicle.

What will this screen do for you?

- Allows users to find answers to questions about specifications such as "Which units have Detroit Diesel series 60 engines?"
- Allows users to build their recall campaigns by Subsystem or Property.
- Allows users to "share" specification information on the Equipment Primary tab to support maintenance staff inquires without them needing to know anything more than use a Zoom button from Work order center.
- Allows a coding structure with Property IDs that can mimic VMRS Repair Groups.
- Allows a "Template" approach using the copy key to add needed data for new Equipment units.

Subsystems and Parts - Entry

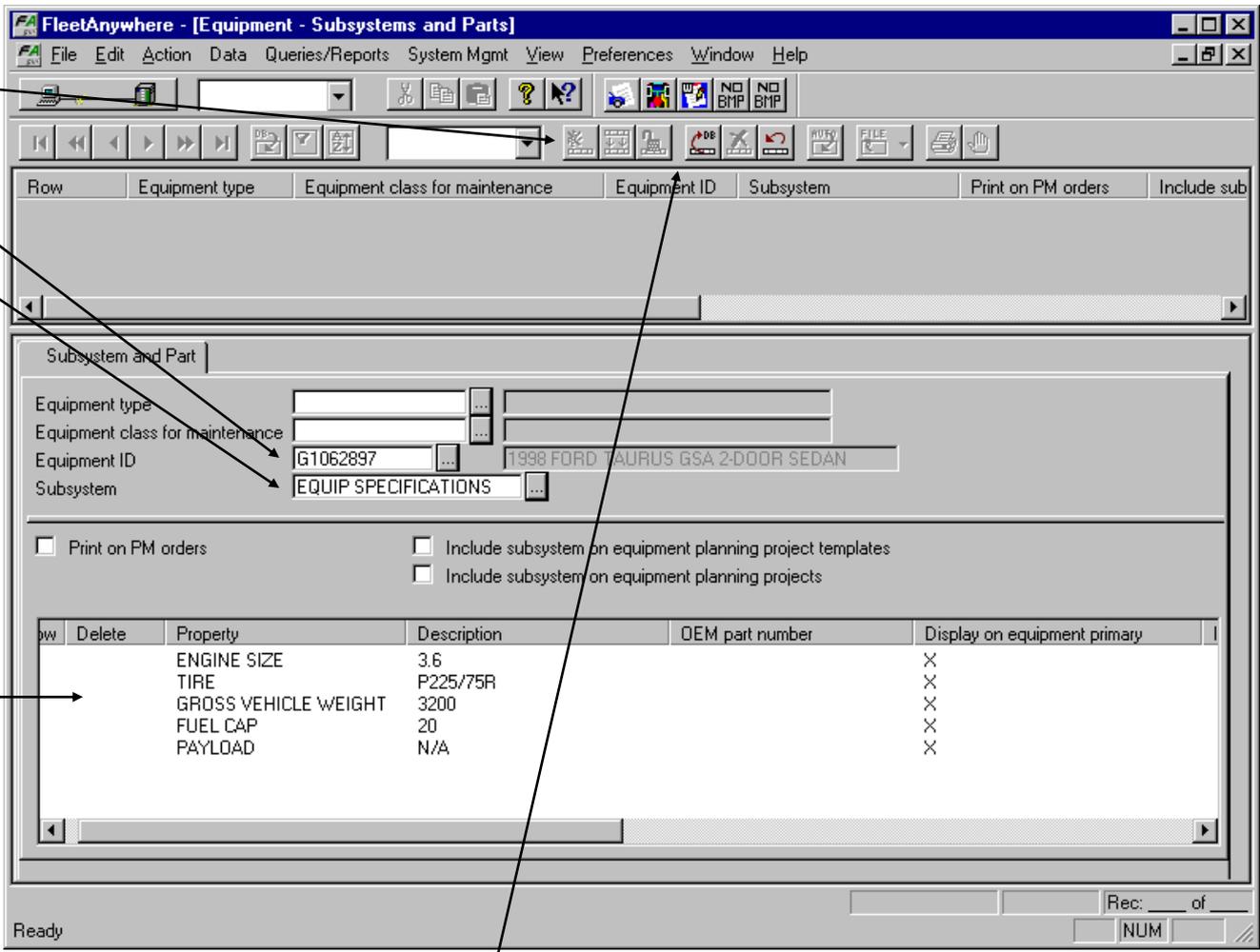
Data → Equipment Units → Subsystems and Parts

1. Click **Prepare for insert**.
2. Enter the **Equipment ID**.
3. Enter the **Subsystem**.

4. Under the **Property** column, enter the subsystems that you want to enter data for (engine size, tire, etc).

5. In the **Description** column, enter the values for each property entered in step 4.

6. Place a check in the **Display on equipment primary** checkbox for all data you want to display on the **Additional Data** tab of the **Fleet Equipment** screen.



7. Click **Process** to save entry.



Fleet Equipment – Subsystems and Parts

State of Texas Required Fields

FleetFocus Subsystem	FleetFocus Property	FleetFocus Description	State of Texas Required Data	Definition
Engine	Size	Key actual displacement	Engine Size	Engine size, in either liters or cubic inches as provided by the manufacturer.
Engine	Qty Cylinders	Key number of cylinders.	Number of Cylinders	Number of cylinders as provided by the manufacturer.
Transmission	Transmission	‘Automatic’ or ‘Manual.’	Transmission	Designation of manual or automatic transmission.
Attributes	Wheel	Key ‘4 wheel drive’, ‘2 wheel drive’	Drive Type	Designation of 2-wheel or 4-wheel drive.
Tire Size	Tire	Key actual size.	Tire Size	Tire specifications as provided by the vehicle manufacturer.

For all entries – check “Display on Equipment Primary” field



Fleet Equipment – Subsystems and Parts (continued)

State of Texas Required Fields

FleetFocus Subsystem	FleetFocus Property	FleetFocus Description	State of Texas Required Data	Definition
Attributes	Description	Enter emissions rating in following format: # VER	Vehicle Emissions Rating	Vehicle emissions rating (VER) as provided by the manufacturer.
Attributes	Description	Enter average mileage in following format: ## / ## (city/highway average miles)	EPA MPG Rating	Average mileage in both the city and highway as approved by the EPA and provided by the manufacturer.
Parts	Select applicable option from choice list, if unavailable select 1,2,3,etc.	Key additional detailed information as appropriate.	Factory Installed Options	Optional equipment or vehicle specifications installed by the manufacturer prior to purchase or delivery.

For all entries – check “Display on Equipment Primary” field



Fleet Equipment - Additional Data Information

Data → Equipment Units → Fleet Equipment (Additional Data tab)

All Subsystems and Properties created with a check in the **Display on equipment primary** checkbox (see page 29) will display on the **Additional Data** tab of the **Fleet Equipment** screen.

NOTE: Additional rows on this tab will slow the retrieval of data on this screen, so only mark the subsystems and properties that are necessary to see here.

The screenshot shows the 'Fleet Management - [Fleet Equipment]' application window. The 'Additional Data' tab is selected, displaying a table of subsystems and properties for the selected equipment unit (00-7675).

Row	Equipment ID	Model year	Manufacturer ID	Model ID	License number	Operator ID	Department ID	Latest meter 1 ree
1	00-7675	2000	FORD	F250	HBD036	1111	015	66025

Row	Defined by	Subsystem	Property	Description
1	Equipment type	SPECIFICATIONS	02-CAB CONVENTIONAL	CONVT CAB
2	Equipment type	SPECIFICATIONS	02-CAB TO AXLE=	92
3	Equipment type	SPECIFICATIONS	02-GRAPHICS PKG A	
4	Equipment type	SPECIFICATIONS	02-UNIT HEIGHT=	85
5	Equipment type	SPECIFICATIONS	02-UNIT OVERALLGTH=	287
6	Equipment type	SPECIFICATIONS	11-AXLE FRONT RATING	14000
7	Equipment type	SPECIFICATIONS	11-AXLES NO.=2	12500
8	Equipment type	SPECIFICATIONS	11-AXLES NO.=3	12500
9	Equipment type	SPECIFICATIONS	12-AXLE REAR RATIO	5.55
10	Equipment type	SPECIFICATIONS	12-AXLE REAR TANDEM	YES
11	Equipment ID	ENGINE	SERIAL NO	7898R8909

Rec: 1 of 1



Specifications – Basic Info

Data → Equipment Units → Specifications (Basic Info tab)

The screenshot shows the 'FleetFocus - [Equipment - Specifications]' application window. The menu bar includes File, Edit, Action, Data, Queries/Reports, System Mgmt, View, Preferences, Window, and Help. The toolbar contains various icons for file operations and data management. Below the toolbar is a table with columns: Row, Equipment ID, Quantity of axles, Cab axle length, Wheelbase, Frame section modulus, Sheave height, Insurance data, Passengers, Tare weight, Scale weight, and GV. The 'Basic Info' tab is selected, showing a form with the following fields: Equipment ID (with a dropdown arrow), Quantity of axles (input field), Cab axle length (input field), Wheelbase (input field), Frame section modulus (input field), Sheave height (input field), Insurance data (input field), Passengers (input field), and a Comment (text area). The status bar at the bottom indicates 'Ready' and 'Rec: ___ of ___'.

General specifications about an equipment unit may be entered on this tab.



Specifications – Basic Info

State of Texas Required Fields

FleetFocus Field Name	State of Texas Required Data	Definition
Wheelbase	Wheelbase	Vehicle's wheelbase measurement as provided by the manufacturer. Enter wheelbase measurement as provided.
Passengers	Passenger Capacity	Enter total number of passengers vehicles can carry, including the driver.



Specifications – Weights

Data → Equipment Units → Specifications (Weights tab)

The screenshot shows the FleetFocus application window titled "FleetFocus - [Equipment - Specifications]". The menu bar includes File, Edit, Action, Data, Queries/Reports, System Mgmt, View, Preferences, Window, and Help. The toolbar contains various icons for file operations and data management. Below the toolbar is a table with columns: Row, Equipment ID, Quantity of axles, Cab axle length, Wheelbase, Frame section modulus, Sheave height, Insurance data, Passengers, Tare weight, Scale weight, and GV. The main area has tabs for Basic Info, Weights, Capacities, Component Warranties, and Special Equipment. The Weights tab is active, showing an Equipment ID field, a Weights section with Tare, Scale, GVWR, and Lic gross fields, and a checkbox for "Unit qualifies for heavy-vehicle use tax". Below this is a table with columns: Row, Delete, Type, Date, Front, Rear, and Total. The status bar at the bottom shows "Ready" and "Rec: ___ of ___".

Use this tab to enter weight information.



Specifications – Weights

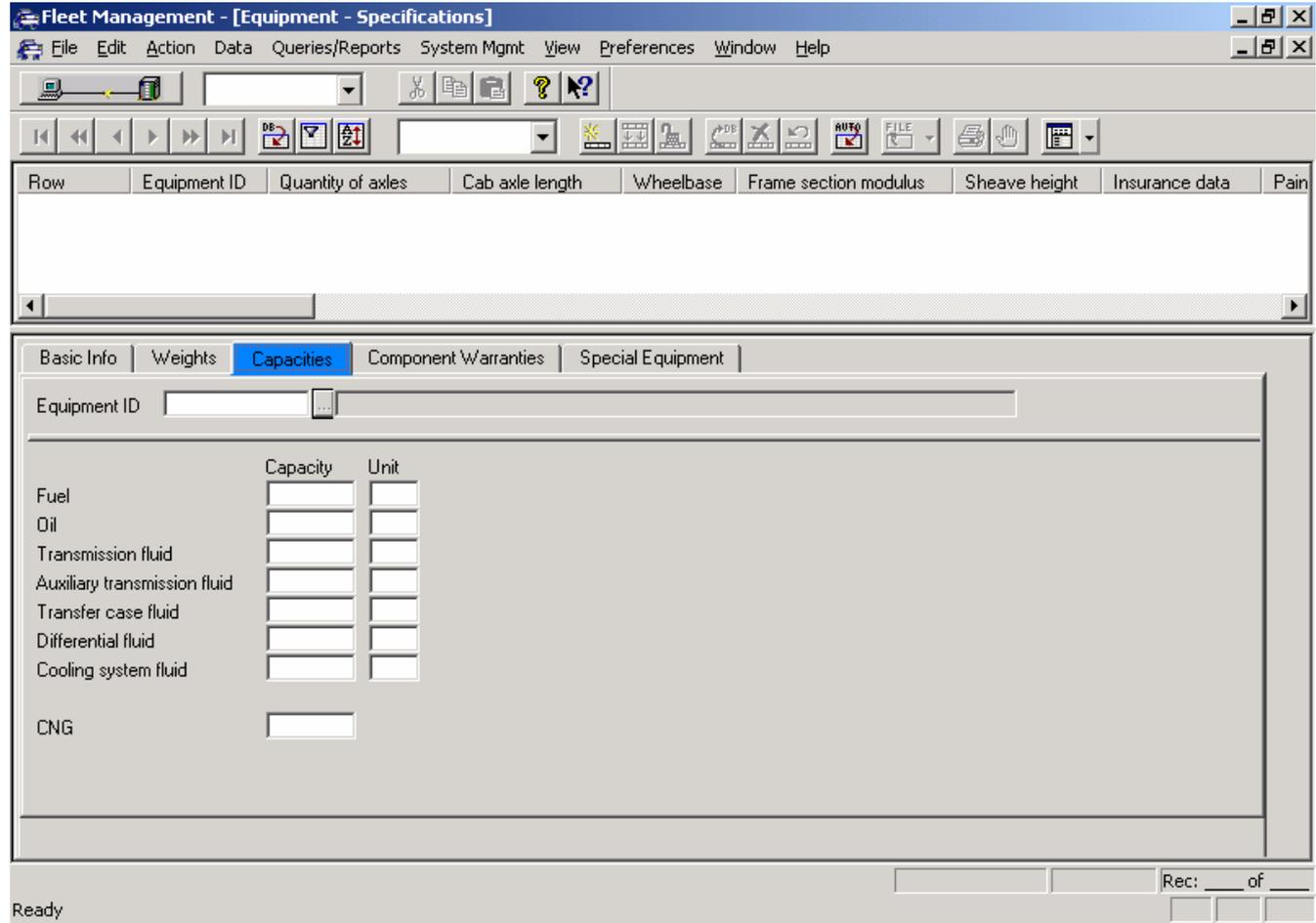
State of Texas Required Fields

FleetFocus Field Name	State of Texas Required Data	Definition
GVWR	GVWR	Gross Vehicle Weight Rating (GVWR) as provided by the manufacturer. Enter GVWR as provided.



Specifications – Capacities

Data → Equipment Units → Specifications (Capacities tab)



Use this tab to enter fuel and fluid capacities.

NOTE: The values entered on this tab will be validated when processing fuel and fluids.



Specifications – Capacities

State of Texas Required Fields

FleetFocus Field Name	State of Texas Required Data	Definition
Oil (Capacity and Unit)	Engine Oil Capacity	Quarts or liters of oil engine holds. Enter numerical amount of oil capacity in capacity sub-field. If oil capacity is measured in quarts, enter 'Q' in unit sub-field. If oil capacity is measured in liters, enter 'L' in unit sub-field.
Transmission Fluid (Capacity and Unit)	Transmission Fluid Capacity	Quarts or liters of fluid the transmission holds. Enter numerical amount of transmission fluid capacity in capacity sub-field. If transmission fluid capacity is measured in quarts, enter 'Q' in unit sub-field. If transmission fluid capacity is measured in liters, enter 'L' in unit sub-field.
Fuel (Capacity and Unit)	Fuel Capacity	Maximum number of gallons (or gallon equivalents) or fuel the vehicle is capable of carrying. Include auxiliary tanks only if used for standard operation of the vehicle. Enter numerical amount of fuel capacity in capacity sub-field. Enter 'G' in unit sub-field if fuel measured in gallons. Enter 'GE' in sub-field if fuel measured in gallon equivalents.

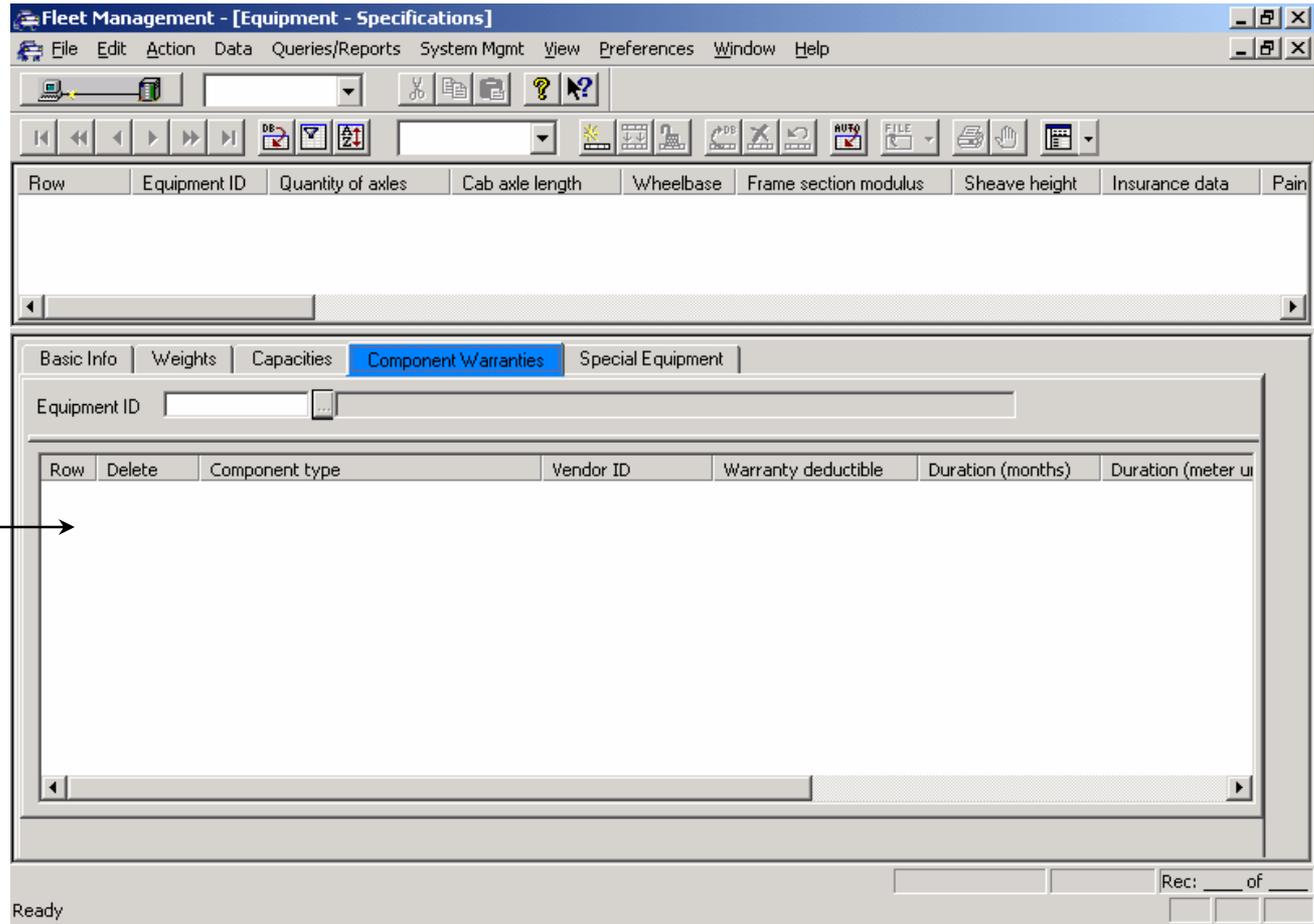
Specifications – Component Warranties

Data → Equipment Units → Specifications (Component Warranties tab)

In order to track **component warranties** for a vehicle, the following fields on this tab must be completed:

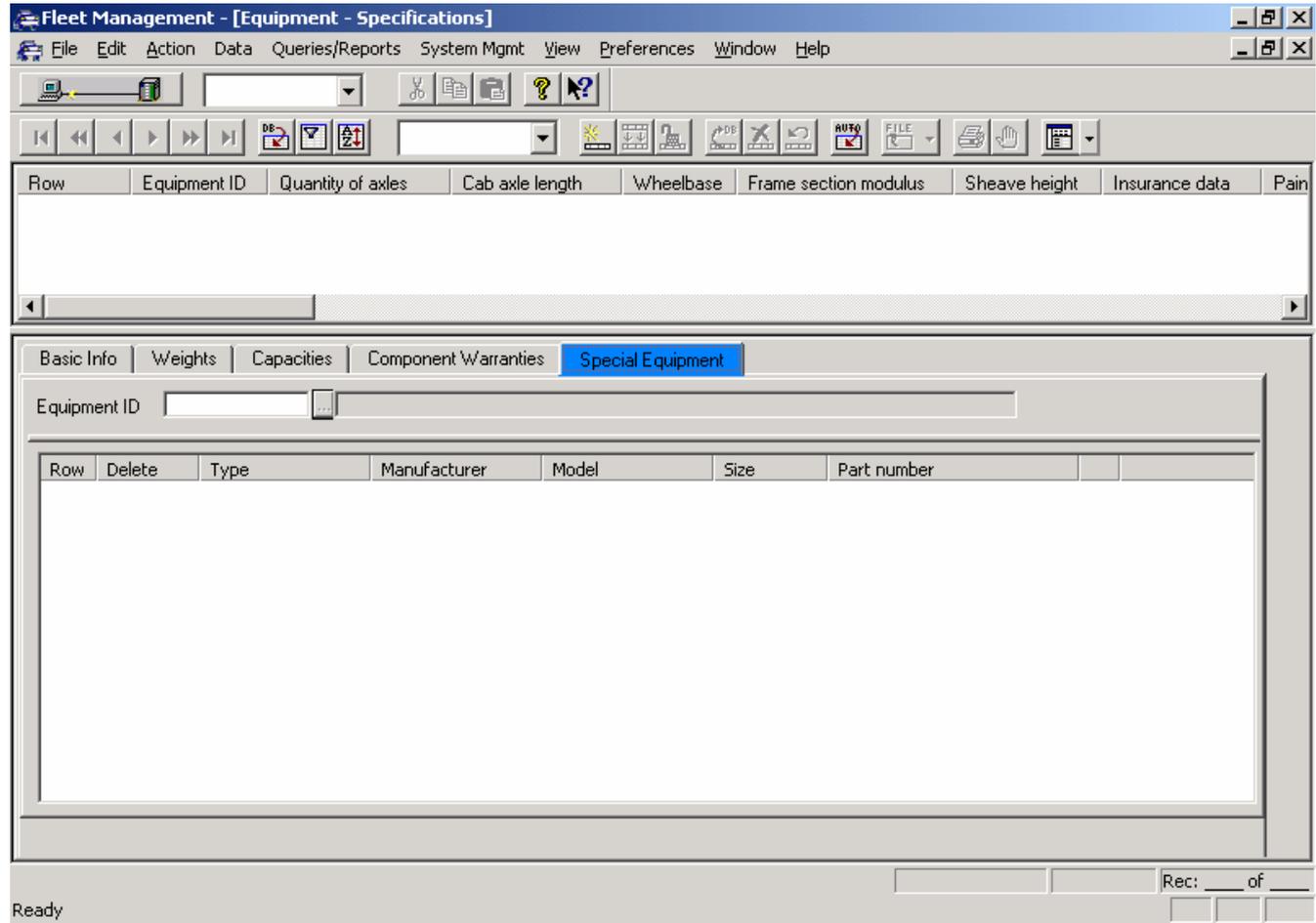
- Component type
- Vendor ID
- Warranty deductible
- Duration (months)
- Duration (meter units)
- Current expiration date
- Current expiration meter

The equipment component that is under warranty must be associated with the Equipment Unit.



Specifications – Special Equipment

Data → Equipment Units → Specifications (Special Equipment tab)



The screenshot shows the 'Fleet Management - [Equipment - Specifications]' window. The 'Special Equipment' tab is selected. Below the tab, there is an 'Equipment ID' field and a table with the following columns: Row, Delete, Type, Manufacturer, Model, Size, and Part number. The table is currently empty.

Row	Delete	Type	Manufacturer	Model	Size	Part number

The purpose of the **Special Equipment** tab is to define information about the special equipment associated with or mounted on an equipment unit.



Adding a New Part

This section describes how to enter a new Part ID record in MAXIMUS FleetFocus FA. To complete a parts record you will need to enter data into the following four screens:

- **Parts Primary Information** - *To enter basic information about the part.*
- **Parts Location Information** - *To enter location specific information (bin, unit of measure).*
- **Parts Adjustments** - *To enter starting inventory level and price.*
- **Vendor/Part Information** - *To specify general information about the vendors of the part.*

Note: New Part ID records can also be created automatically using the MAXIMUS FleetFocus FA Quick Orders screen

Parts Primary Information

Data → Parts Items → Primary Information

1. Click here to **Prepare for Insert**.
2. Enter the **Part ID**.
3. Enter "0" in the **Part suffix**.
4. Enter a single descriptive term as a **Keyword** (ex: Filter).
5. Enter a full part description as **Short Description**.
6. Enter -- as both **Product Category** and **Part Classification**.

The screenshot shows the 'Fleet Management - [Parts - Primary Information]' window. The interface includes a menu bar (File, Edit, Action, Data, Queries/Reports, System Mgmt, View, Preferences, Window, Help) and a toolbar with various icons. Below the toolbar is a table with columns: Row, Part ID, Part suffix, Keyword, Part short description. The main form area contains several input fields and tabs. The 'Markup' tab is highlighted with an arrow from the instruction below. The 'Markup' tab shows a 'Kit type' dropdown menu with options: NONE, ASSEMBLED, UNASSEMBLED. Other tabs include Kit Components, Kits Including Part, Movement, Equipment Types Used On, Work Orders Used On, Markups, Cross-references, Basic Info, Stock Mgmt, More Info, Purchasing Info, Purchasing Notes, EOQ, Repair, Comments, and Stock Status. The 'Part ID' field is empty, 'Part suffix' contains '0', 'Keyword' contains 'Filter', and 'Short description' contains a full part description. The 'Product category ID' and 'Part classification ID' fields both contain '--'. The 'VMPS code' field is empty. The 'Date and time added' field is empty. The 'Associated file' field is empty. The status bar at the bottom shows 'Ready' and 'Rec: ___ of ___'.

Click on the **Markup** tab (continued on the next page).



Parts Primary Information (continued)

Data → Parts Items → Primary Information

7. Enter the **Markup percentage** (e.g. 30)

8. Check **No markup on this part** when no markup applied to this part.

9. Enter the **Markup cap** (e.g. 300).

11. Click here to **Process**.

Parts Location Information

Data → *Parts Items* → *Location Information*

1. Click here to **Prepare for Insert.**

2. Enter the **Part ID.**

- MAXIMUS FleetFocus FA automatically displays:*
- Part Suffix
 - Keyword
 - Short Description
 - Product Category ID
 - Part Classification ID

3. Enter Station Location as an **Inventory Location ID (EX: 8360P).**

4. Select the **Unit of Measure** from the choice list.

5. Enter the **Bin location.**

Click on the **Stock Management** tab (continued on the next page).

Parts Location Information (continued)

Data → Parts Items → Location Information

Click on the **Purchasing Info** tab (continued on the next page).

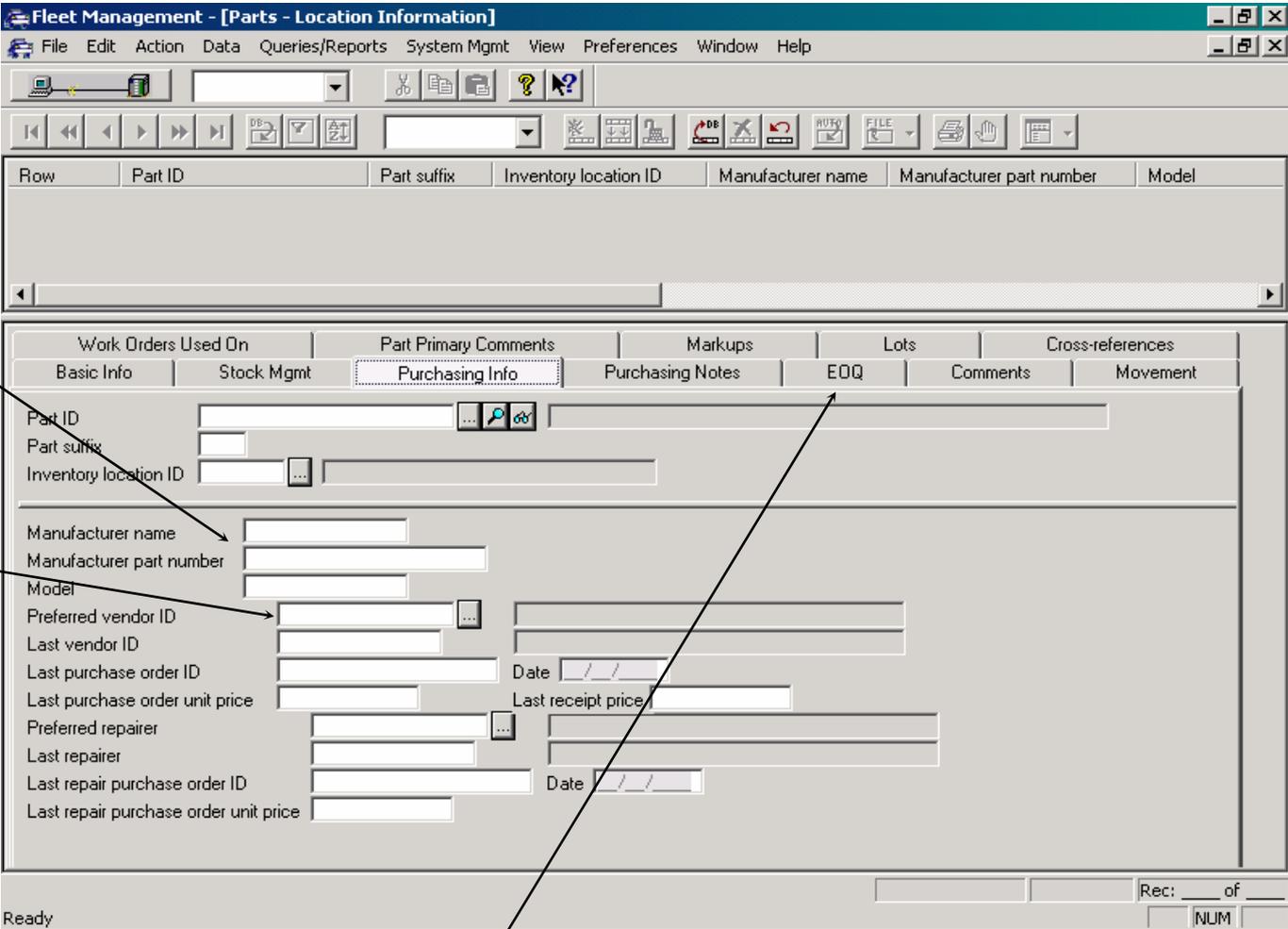
6. Enter **Inventory month** from chose list when inventory will be counted. For a stocked part select **ALL** and for good on demand part select **NONE**.

7. Select default **Stock Status** from the choice list. Should be **STOCKED** or **ON DEMAND PROMOTABLE**.

The screenshot shows the 'Fleet Management - [Parts - Location Information]' window. The 'Purchasing Info' tab is active. The 'Inventory month' dropdown is open, showing a list of months from NONE to JAN-JUL. The 'Stock status' dropdown is also open, showing options: STOCKED, ON DEMAND - PROMOTABLE, ON DEMAND - NOT PROMOTABLE, and PROHIBITED. The 'Part ID' and 'Inventory location ID' fields are visible above the dropdowns.

Parts Location Information (continued)

Data → Parts Items → Location Information



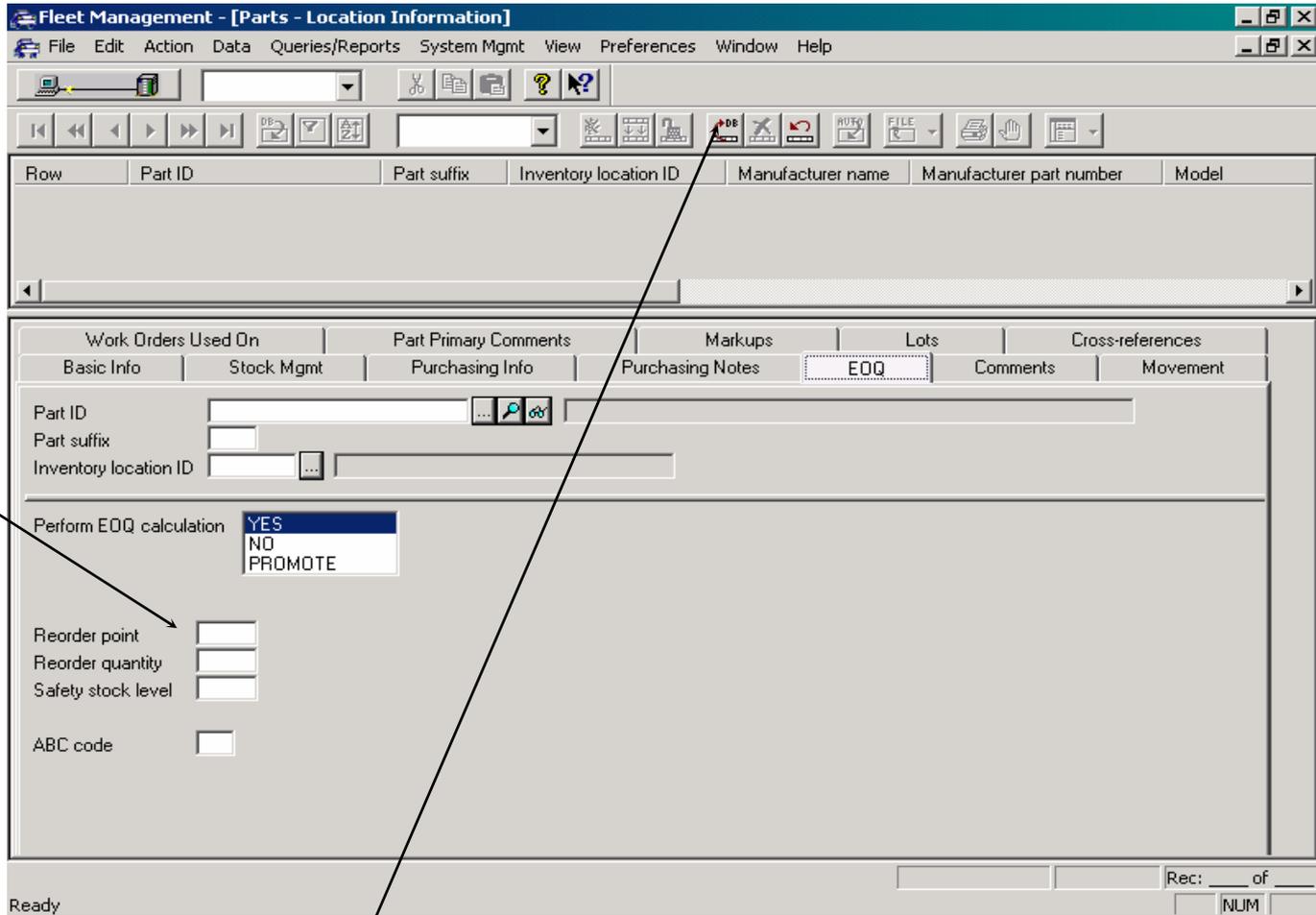
8. Enter **Manufacturer's part number.**

9. Select a **Preferred vendor ID.**

Click on the **EOQ** tab (continued on the next page).

Parts Location Information (continued)

Data → Parts Items → Location Information



10. Enter the
- **Reorder Point**
 - **Reorder Quantity**
 - **Safety Stock Level**

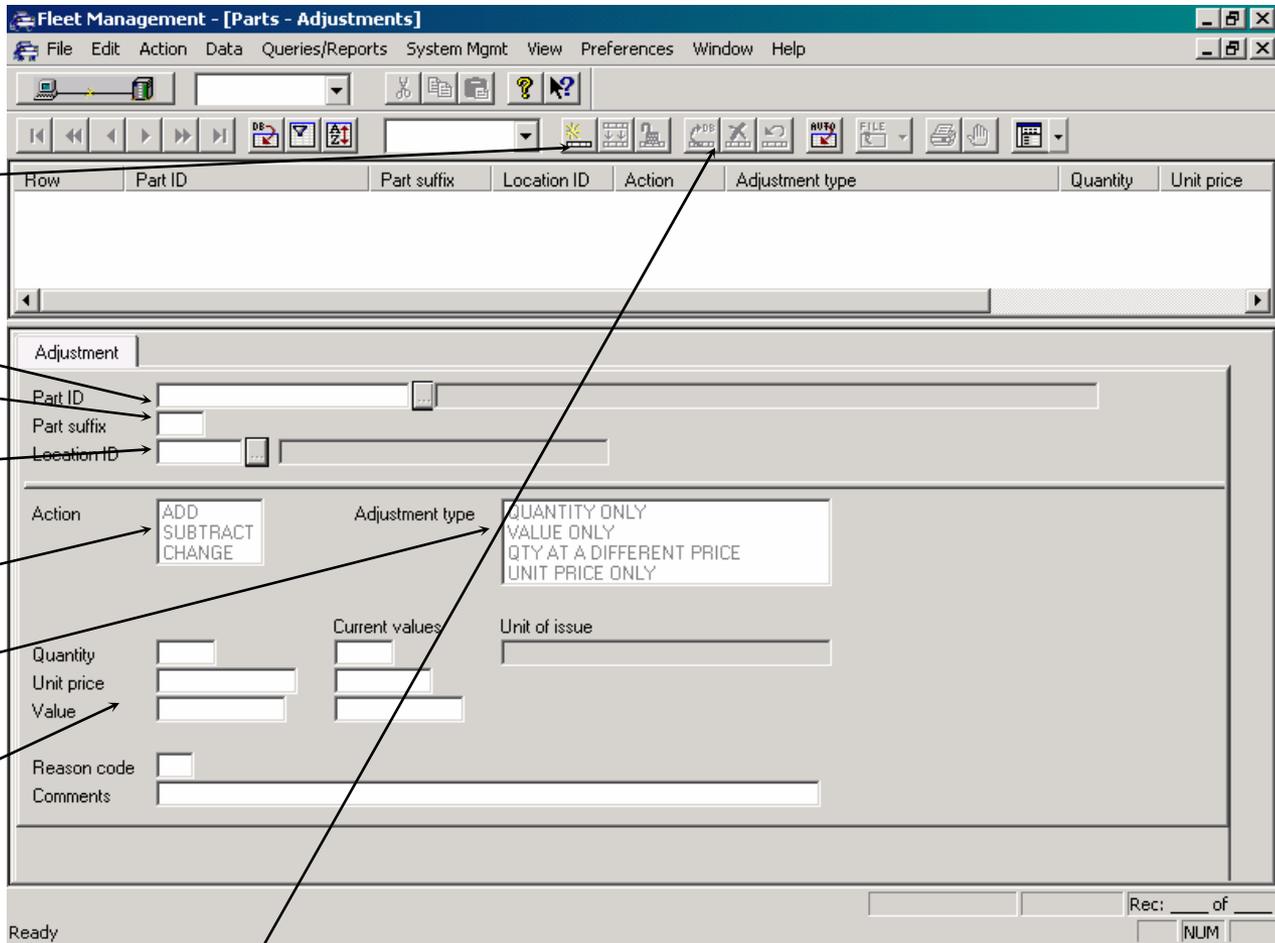
11. Click here to **Process**.

Parts Inventory Adjustments

Data → Parts Activity → Adjustments

Use this screen to adjust inventory counts and unit prices.

1. Click here to **Prepare for Insert**.
2. Enter the **Part ID**.
3. Enter "0" in the **Part suffix**.
4. Enter Station Location as an **Inventory Location ID (EX: 8360P)**.
5. Select desired **Action**.
6. Select **Adjustment type** associated with Action selected.]
7. Based on Action and Adjustment type enter
 - Quantity
 - Unit Price
 - Value



8. Click here to process.



Vendor/Part Information

Data → Purchasing → Vendor/Part Information

Click on the **Warranty** tab (continued on the next page).

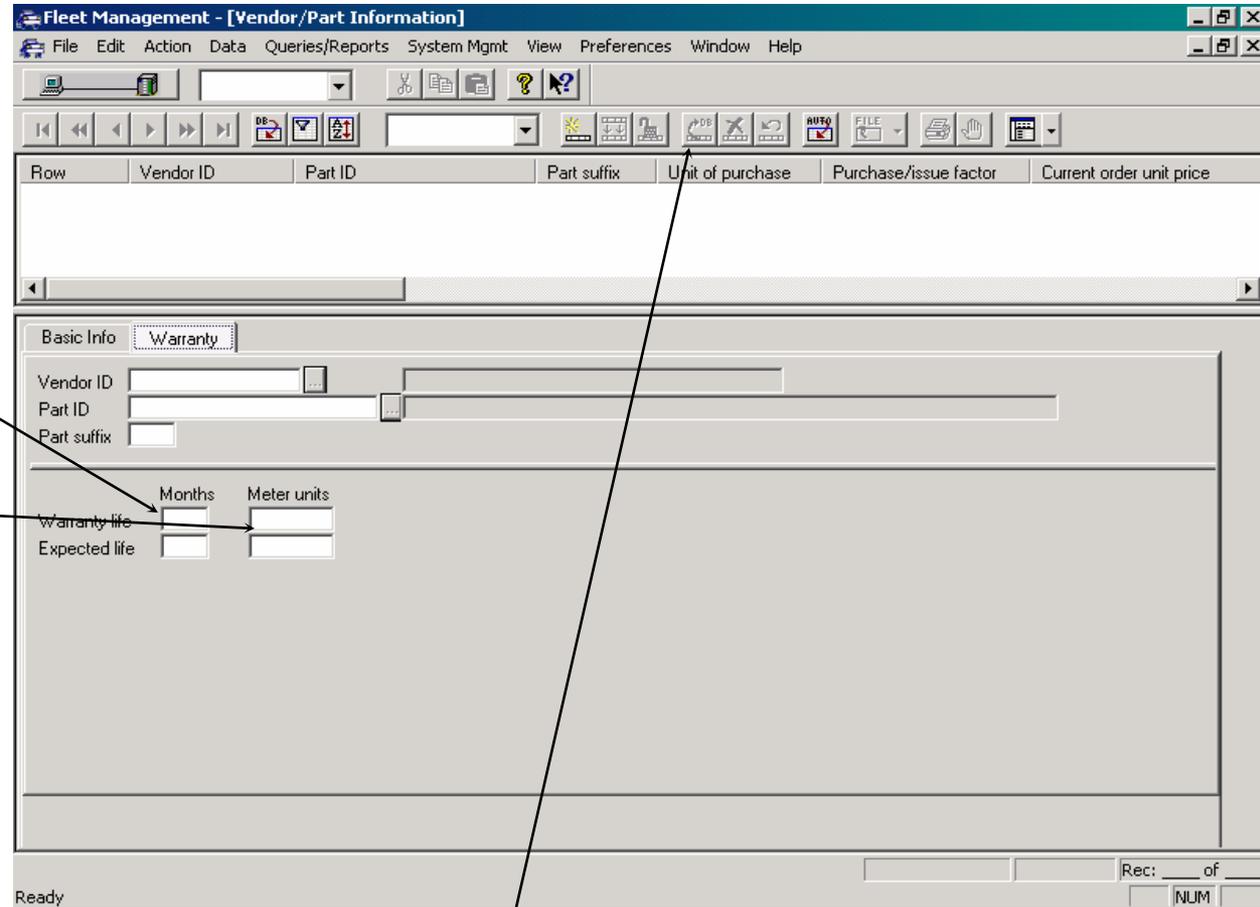
1. Retrieve the (vendor/part) record by filtering on the **Vendor ID** and **Part ID**.
2. Click here to unlock the record.
3. Enter the **Unit of purchase**.
4. Enter the **Price type**.
5. Enter **Vendor lead time (days)**.
6. Enter **Core credit value** if part has a core.
7. Select **Warranty start** if part is warrantable.

The screenshot shows the 'Fleet Management - [Vendor/Part Information]' window. The 'Warranty' tab is active. The form contains the following fields and options:

- Vendor ID: [Text Field]
- Part ID: [Text Field]
- Part suffix: [Text Field]
- Unit of purchase: [Text Field]
- Purchase/issue factor: [Text Field]
- Current order unit price: [Text Field]
- Price type: [Text Field]
- Expiration date: [Date Picker]
- Discount percentage: [Text Field]
- Surcharge percentage: [Text Field]
- Comments: [Text Area]
- Vendor lead time (days): [Text Field]
- Standard package quantity: [Text Field]
- Minimum order quantity: [Text Field]
- Core credit value: [Text Field]
- Warranty start: [Dropdown Menu with options: UPON INSTALLATION, UPON DELIVERY]
- Entry complete:

Vendor/Part Information (continued)

Data → Purchasing → Vendor/Part Information



Row	Vendor ID	Part ID	Part suffix	Unit of purchase	Purchase/issue factor	Current order unit price
-----	-----------	---------	-------------	------------------	-----------------------	--------------------------

Basic Info **Warranty**

Vendor ID

Part ID

Part suffix

	Months	Meter units
Warranty life	<input type="text"/>	<input type="text"/>
Expected life	<input type="text"/>	<input type="text"/>

Ready Rec: ___ of ___
NUM

9. Enter **Warranty life (Meter units)**.

10. Enter **Warranty Life (Months)**.

11. Click here to process.

Parts Cross-reference

Data → Parts Items → Cross-references

Use this screen to quickly and easily set up cross references between like parts from different manufacturers.

1. Enter **Part ID** (part number as it is defined in FA).
2. Enter **Part suffix** for part number as defined in FA.
3. Enter **Cross-reference part ID** (another part ID for Part ID entered).
4. Enter **Cross-reference part suffix**.

5. Click here to **Process**.



Warranty

Section IV



Section IV Contents

Topic		Page
1.	Setting up Component Warranties	101
2.	Setting up Warranty Claims	109
3.	Component Warranty Claims	110
4.	Bumper to Bumper Warranty Claims	111
5.	Warranty Claims	114



Vendors – Setting up Component Warranties

Data → Purchasing → Setup → Vendors → Primary Information (Functions tab)

The following pages will assist you in setting up the functionality of Component Warranties.

Fleet Management - [Vendors - Primary Information]

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

Row Vendor ID Name Contact name Phone

Basic Info **Functions** Purchasing Info Locations Services and Repair Groups

Vendor ID [] []

Vendor provides:

- Equipment
- Equipment and component warranties
- Equipment repair and PM (commercial)
- Parts
- Parts warranties
- Parts repair and rebuild
- Fuel
- Testing

Ready

Rec: ___ of ___

Each Vendor that provides component warranties must be setup on the **Vendor Primary Information** screen. On the Functions tab of the Vendors screen, check the **Equipment and component warranties** box.



Components – Setting up Component Warranties (continued)

Data → *Equipment Units* → *Setup* → *Warranty Components*

All components that are under warranty on the equipment unit must be defined in the **Warranty Components** screen.



Row	Warranty component type	Track as a component	Track usage of parent equipment unit
-----	-------------------------	----------------------	--------------------------------------

Warranty Components

Warranty component type []

Track as a component

Track usage of parent equipment unit

Ready

Rec: ___ of ___



Components – Setting up Component Warranties (continued)

Data → Shop Activity → Setup → Tasks → Primary Information (Related Component tab)

To link expected tasks on a work order to components set up on equipment units, the repair task or repair group must have a Related component for warranty purposes.

This linkage is what activates the component warranty tracking for equipment units on work orders.

The screenshot shows the 'Fleet Management - [Tasks - Primary Information]' window. The 'Related Component' tab is selected. The 'Task ID' field is populated with a value. The 'Related component for warranty purposes' field is empty. An arrow points from the text on the left to this field.

Row	Task ID	Description	Task type	Inventory rebuilt

Basic Info | Procedure Info | **Related Component**

Task ID: []

Related component for warranty purposes: []

Ready [] [] [] Rec: ___ of ___



Usage – Setting up Component Warranties (continued)

Data → Shop Activity → Work Order Center (Tasks tab)

Open a work order for an equipment unit that has a component warranty defined. Enter the Repair Group or Task ID associated with the component warranty in the **Task ID** field on **Tasks** tab.

The screenshot shows the 'Fleet Management - [Work Order Center]' application window. The 'Tasks' tab is active, displaying a table of task records. The table has the following columns: Row, Delete, Task ID, Work accomplished code, Work class, Warranty work, Repair reason ID, Task priority ID, and Date and. A single row is visible with the following data: Row *, Delete (arrow), Task ID 23, Work accomplished code, Work class 2, Warranty work UNKNOWN, Repair reason ID A, Task priority ID 6, and Date and 12/02/20. The status bar at the bottom indicates 'Ready' and 'Rec: ___ of ___'.



Usage – Setting up Component Warranties (continued)

Data → Shop Activity → Work Order Center (Messages tab)

If the Equipment unit has a warranty component defined and the task ID entered is associated with a component warranty, this message will display in the **Messages** tab of the **Work Order Center** screen.

NOTE: This information will print on the work order

Output Control | Labor | Parts | Commercial | Delay | Tools | Current Labor Assignments | Summary Cost Info
Basic Info | More Info | **Messages** | Comments | Standard Jobs | Tasks | Service Requests | Estimating

Work order ID: 001 | 2002 1973 | Equipment ID: 0102 | Job status: OPEN | Current work delay ID: []

Information about the work order or equipment unit
UNIT IS 4 DAYS LATE FOR PM SERVICE A
TASK 23 -- COMPONENT TRANSMISSION IS UNDER WARRANTY

Ready | Rec: ___ of ___



Usage – Setting up Component Warranties (continued)

Data → Shop Activity → Work Order Center (Tasks tab)

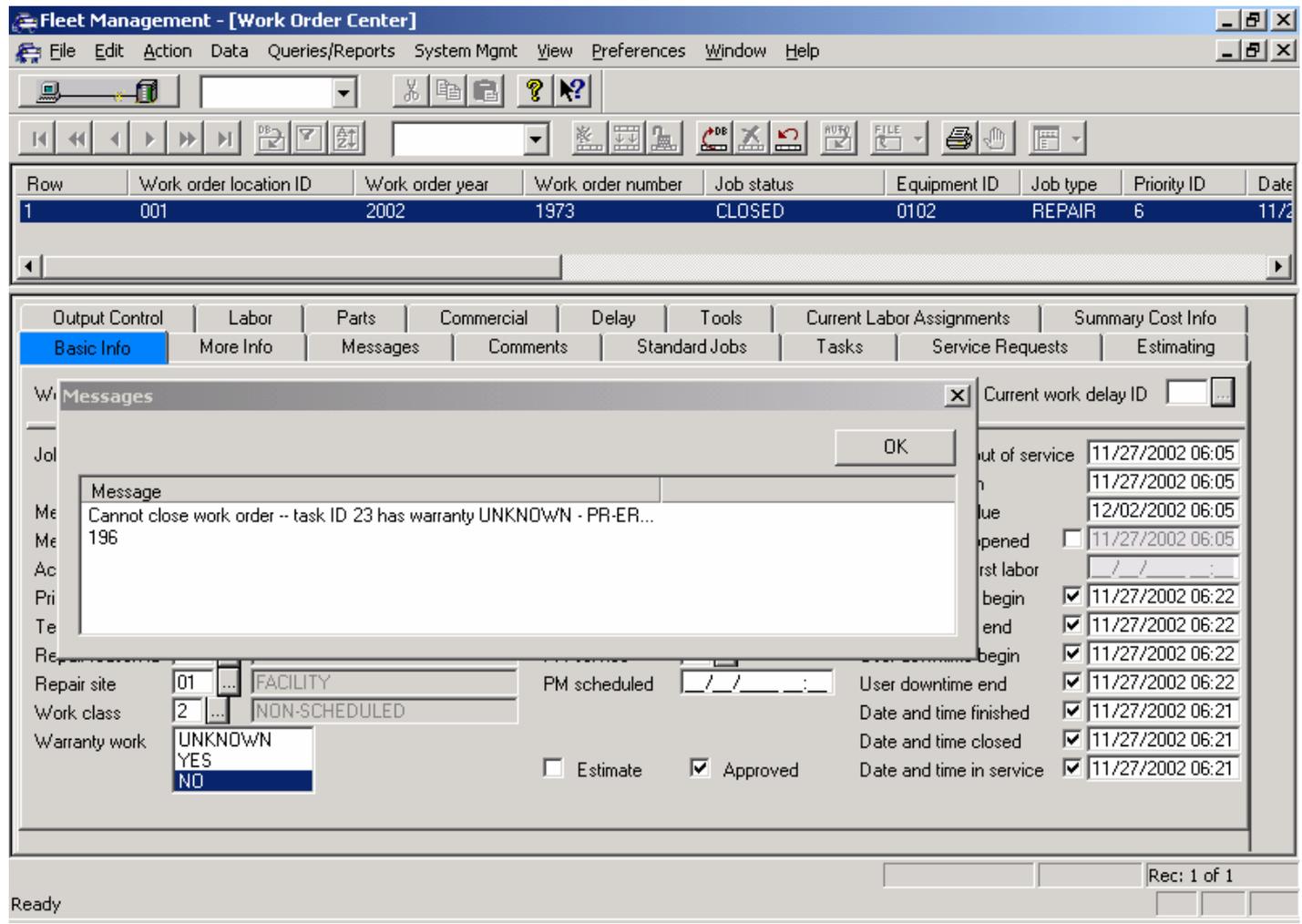
The screenshot shows the 'Fleet Management - [Work Order Center]' application window. The 'Tasks' tab is active. The 'Warranty work' field in the task list is highlighted with an arrow pointing to the explanatory text on the left.

Row	Delete	Task ID	Work accomplished code	Work class	Warranty work	Repair reason ID	Task priority ID	Date and
*		23		2	UNKNOWN		6	12/02/20
*								

To flag the Work Order for the Component Warranty Work, set the **Warranty work** field on the Tasks tab from UNKNOWN to YES.

Usage – Setting up Component Warranties (continued)

Data → Shop Activity → Work Order Center



The screenshot shows the 'Fleet Management - [Work Order Center]' application window. At the top, there is a menu bar (File, Edit, Action, Data, Queries/Reports, System Mgmt, View, Preferences, Window, Help) and a toolbar with various icons. Below the toolbar is a table with the following data:

Row	Work order location ID	Work order year	Work order number	Job status	Equipment ID	Job type	Priority ID	Date
1	001	2002	1973	CLOSED	0102	REPAIR	6	11/27/2002

Below the table is a series of tabs: Output Control, Labor, Parts, Commercial, Delay, Tools, Current Labor Assignments, Summary Cost Info, Basic Info, More Info, Messages, Comments, Standard Jobs, Tasks, Service Requests, Estimating. The 'Messages' tab is active, displaying a dialog box with the following text:

Message
Cannot close work order -- task ID 23 has warranty UNKNOWN - PR-ER...
196

The dialog box has an 'OK' button. In the background, the 'Warranty work' dropdown menu is open, showing options: UNKNOWN, YES, and NO. The 'UNKNOWN' option is selected.

This message will display when closing a Work Order with an associated component warranty if the **Warranty work** field is set to UNKNOWN.



Setting up Warranty Claims

Data → Setup → Organizational Structure → Locations (Work Orders – More Info tab)

To automatically create an Equipment Warranty Claim for component warranty work or Bumper to Bumper work performed on a work order, set the **Automatically create warranty claims when closing work order including warranty work** option on the **Locations** screen.

You cannot specify YES for an equipment unit that is not under warranty unless the work order's location ID has a check in the **Allow warranty set to YES when warranty is not in effect**.

The screenshot shows the 'Fleet Management - [Locations]' application window. The 'Work Orders - More Info' tab is active. The 'Location ID' is 001 and the 'Name' is CHICAGO. The 'Responsible employee ID' is empty. The 'Default setting for warranty when warranty is in effect' is set to UNKNOWN. The 'Require match between assigned service request and work performed' is set to NONE. The 'Automatically create warranty claims when closing work order including warranty work' checkbox is checked. The 'Allow warranty set to YES when warranty is not in effect' checkbox is also checked. The status bar at the bottom shows 'Successful update' and 'Ready'.

Row	Location ID	Name	Contact name	Address line 1
1	001	CHICAGO	JOHN HANSEN	

Motor Pool: Basic Info | Rates and Markups: Functions | Roll-ups: Work Orders | Work Calendar: Work Orders - More Info | Message Printer: Inventory | Inventory - More Info

Location ID: 001 CHICAGO

Responsible employee ID: []

Prohibit closing call center work orders prior to approval of all invoices for the work order
 Automatically create warranty claims when closing work order including warranty work
 Allow warranty set to YES when warranty is not in effect
 Default setting for warranty when warranty is in effect: UNKNOWN / YES
 Require match between assigned service request and work performed: NONE / EXACT TASK / ANY TASK IN REPAIR GROUP

Successful update
Ready

Rec: 1 of 1



Component Warranty Claims

Data → Shop Activity → Work Order Center

Once all work is complete on the Work Order and the Work Order is closed, a warranty claim will automatically be created if the **Automatically create warranty claims when closing work order including warranty work** option is set.

The screenshot shows the 'Fleet Management - [Work Order Center]' application window. A 'Messages' dialog box is open, displaying the message: 'Equipment unit 0102: 1 warranty claim created'. The background window shows a table with columns: Row, Work order location ID, Work order year, Work order number, Job status, Equipment ID, Job type, Priority ID, and Date. The status bar at the bottom shows 'Ready' and 'Rec: ___ of ___'.



Bumper to Bumper Warranty Claims (continued)

Data → Shop Activity → Work Order Center (Basic Info tab)

Fleet Management - [Work Order Center]

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

Row	Work order location ID	Work order year	Work order number	Job status	Equipment ID	Job type	Priority ID	Date
1	001	2002	1977	OPEN	0101	REPAIR	2	11/2

Output Control Labor Parts Commercial Delay Tools Current Labor Assignments Summary Cost Info

Basic Info More Info Messages Comments Standard Jobs Tasks Service Requests Estimating

Work order ID 001 2002 1977 Equipment ID 0101 Job status OPEN Current work delay ID

Job type REPAIR Equipment ID 0101 License number Date and time out of service 11/27/2002 07:24
 PM 1999 BUI ACC == CURRENT METERS: 1 - 58086; 2 - 0X Date and time in 11/27/2002 07:24

Meter 1 58086 Meter 1 validation Life meter 1 usage 58086 Date and time due 11/27/2002 15:24
 Meter 2 0 Meter 2 validation Service status Date and time opened 11/27/2002 07:24

Account ID 8011 Date and time first labor
 Priority ID 2 OUT OF SERVICE 8 HOURS Shop downtime begin 11/27/2002 07:24
 Tech/Vendor Shop downtime end 11/27/2002 07:26

Repair reason ID 8 BREAKDOWN PM service
 Repair site 01 FACILITY PM scheduled
 Work class 2 NON-SCHEDULED Date and time finished
 Warranty work UNKNOWN Date and time closed
 YES Date and time in service
 NO Estimate Approved

Ready Rec: 1 of 1

If the task on the work order is under the vehicle bumper to bumper parameters, set **Warranty work** to YES.

NOTE: To default the Work Order, Warranty work field to UNKNOWN (if under warranty), set the **Default setting for warranty when warranty is in effect to UNKNOWN on the Work Orders – More Info tab of the Locations screen.**



Bumper to Bumper Warranty Claims (continued)

Data → Shop Activity → Work Order Center

If there are multiple tasks on the Tasks tab, this message will display when closing a Work Order if the **Warranty work** field is set to YES.

NOTE: This message only applies when **Automatically create warranty claims when closing work order including warranty work** option on the **Locations** screen is checked (see page 43).

Mark the Equip warranty work field on the Tasks tab for each task that applies to the warranty work performed under the bumper-to-bumper warranty.

The screenshot shows the 'Fleet Management - [Work Order Center]' application window. The 'Tasks' tab is selected, displaying a table of tasks for work order 001, year 2002, number 1977, on equipment 0101. A message dialog box is open, displaying the following text:

Message
Multiple possible tasks for warranty claims -- Mark warranty tasks under Equip warranty work on Tasks tab - PR-EF 196

The dialog box has an 'OK' button. The background window shows a table with the following data:

Row	Work order location ID	Work order year	Work order number	Job status	Equipment ID	Job type	Priority ID	Date
1	001	2002	1977	OPEN	0101	REPAIR	2	11/27/20

Below the table, there are tabs for 'Output Control', 'Labor', 'Parts', 'Commercial', 'Delay', 'Tools', 'Current Labor Assignments', and 'Summary Cost Info'. The 'Tasks' tab is active. Below the tabs, there are input fields for 'Work order ID' (001), 'Year' (2002), 'Equipment ID' (0101), and 'Job status' (OPEN). At the bottom right, it says 'Rec: 1 of 1'.



Bumper to Bumper Warranty Claims (continued)

Data → Shop Activity → Work Order Center

Once all work is complete on the Work Order and the Work Order is closed, a Warranty Claim will automatically be created if the optional **Automatically create warranty claims when closing work order including warranty work** is set.

Row	Work order location ID	Work order year	Work order number	Job status	Equipment ID	Job type	Priority ID	Date
1	001	2002	1977	CLOSED	0101	REPAIR	2	11/27/20

Row	Delete	Task ID	Work accomplished code	Work class	Warranty work	Repair reason ID	Task priority ID	Date and
1		01-01		2	NO	B	2	11/27/20
2		13		2	NO	B	2	11/27/20

Message
Equipment unit 0101: 1 warranty claim created

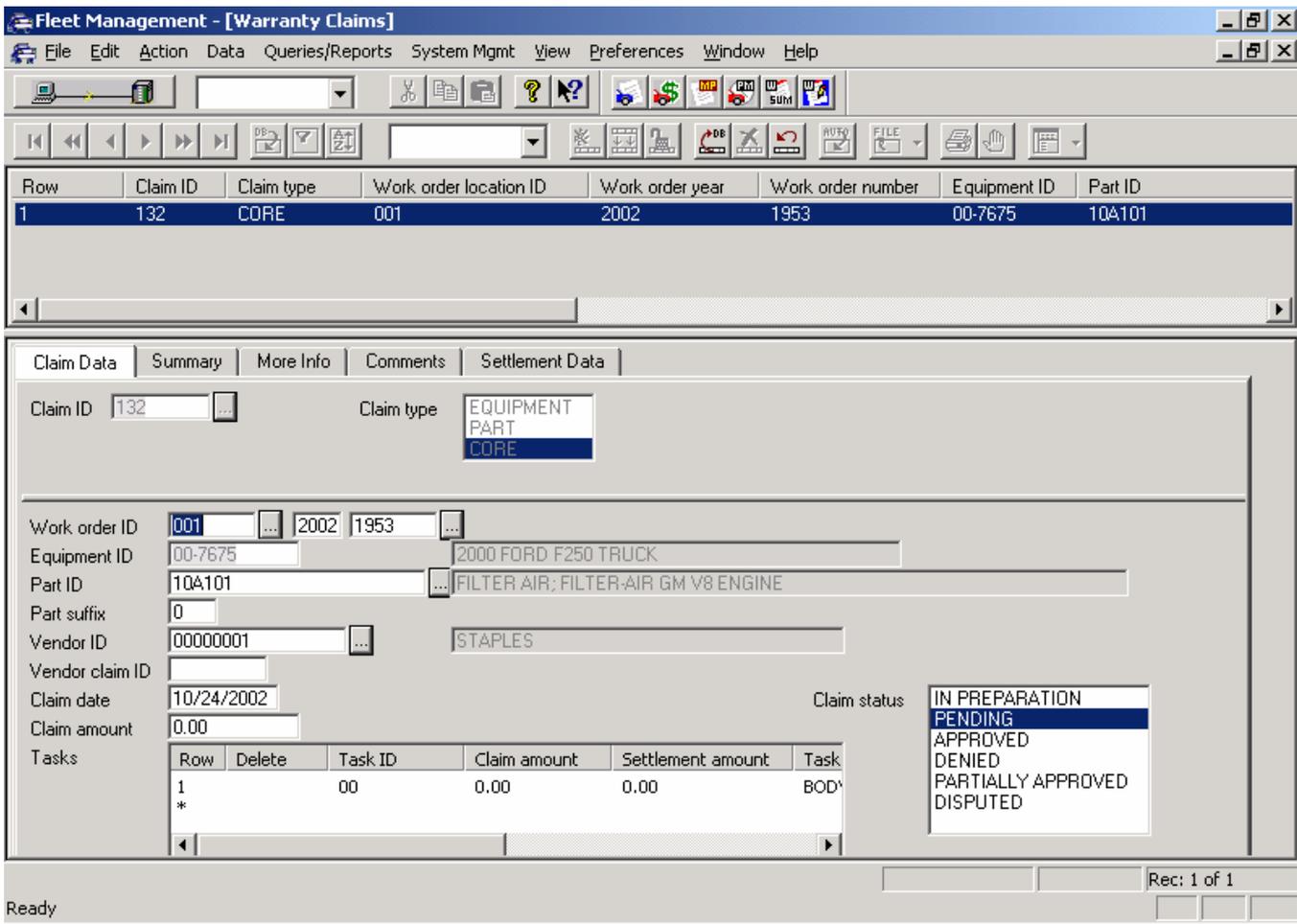
Successful update
Ready

Rec: 1 of 1

Warranty Claims

Data → *Parts Activity* → *Warranty Claims (Claim Data tab)*

The purpose of the **Warranty Claims** screen is to define and update warranty claims made to vendors or manufacturers in order to recover costs related the return of core parts and equipment/parts warranties.



Row	Claim ID	Claim type	Work order location ID	Work order year	Work order number	Equipment ID	Part ID
1	132	CORE	001	2002	1953	00-7675	10A101

Row	Delete	Task ID	Claim amount	Settlement amount	Task
1	*	00	0.00	0.00	BODY



Warranty Claims

Data → *Parts Activity* → *Warranty Claims (Settlement Data tab)*

Once the vendor has fully or partially paid the claim, set the **Claim status** field on the Claim Data tab to either APPROVED or PARTIALLY APPROVED, and enter the **Settlement date** and **Settlement amount** on the **Settlement Data** tab.

The screenshot shows the 'Fleet Management - [Warranty Claims]' application window. The menu bar includes File, Edit, Action, Data, Queries/Reports, System Mgmt, View, Preferences, Window, and Help. The toolbar contains various icons for navigation and data manipulation. Below the toolbar is a data grid with the following columns: Row, Claim ID, Claim type, Work order location ID, Work order year, Work order number, Equipment ID, and Part ID. The first row contains the values: 1, 132, CORE, 001, 2002, 1953, 00-7675, and 10A101. Below the grid are several tabs: Claim Data, Summary, More Info, Comments, and Settlement Data. The Settlement Data tab is active, showing a form with the following fields: Claim ID (132), Claim type (EQUIPMENT, PART, CORE), Settlement date (10/26/2002), Settlement amount (10.00), Tax amount (0.00), and Freight amount (0.00). The status bar at the bottom indicates 'Ready' and 'Rec: 1 of 1'.

Row	Claim ID	Claim type	Work order location ID	Work order year	Work order number	Equipment ID	Part ID
1	132	CORE	001	2002	1953	00-7675	10A101

Claim Data | Summary | More Info | Comments | Settlement Data

Claim ID: 132 Claim type: EQUIPMENT
PART
CORE

Settlement date: 10/26/2002
Settlement amount: 10.00
Tax amount: 0.00
Freight amount: 0.00

Ready Rec: 1 of 1



Data Entry/Maintenance

Section V



Section V Contents

Topic		Page
1.	Fuel/Fluid Tanks Setup	118
2.	Fueling – External and Internal Fuel Tickets	119
3.	Meter Readings-Assignments-Usage	125
4.	Usage Tickets	127
5.	Work Order Center	129
	a) Posting Labor	139
	b) Posting Parts	144
	c) Posting Commercial	146
	d) Closing a Work Order	149

Fuel/Fluid Tanks

Data → Fuel/Fluid Tanks → Primary Information

1. Click here to **Insert** a new record

2. Give the Fuel/Fluid Tank and unique **Tank ID**

3. Select a **Location ID** from the list provided.

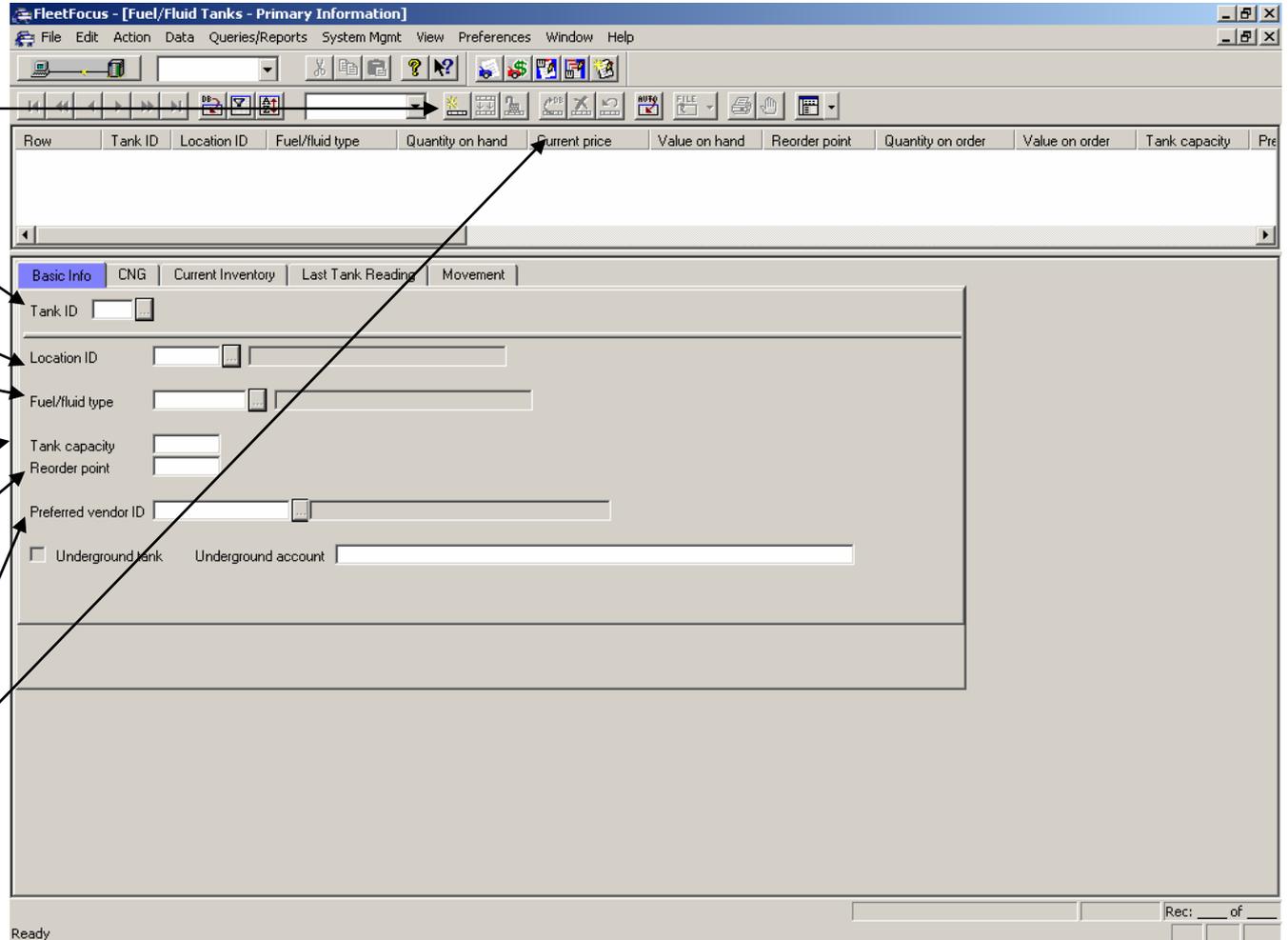
4. Choose the **Fuel/Fluid type** that will go in this tank.

5. Enter total **Tank Capacity**.

6. Enter **Reorder Point** to enable automated reordering.

7. Select **Preferred Vendor ID** from the list provided to enable automated reordering.

8. **Process** the record



The screenshot displays the 'FleetFocus - [Fuel/Fluid Tanks - Primary Information]' window. The interface includes a menu bar (File, Edit, Action, Data, Queries/Reports, System Mgmt, View, Preferences, Window, Help) and a toolbar with various icons. A table at the top lists columns: Row, Tank ID, Location ID, Fuel/fluid type, Quantity on hand, Current price, Value on hand, Reorder point, Quantity on order, Value on order, Tank capacity, and Pre. Below the table are tabs for 'Basic Info', 'CNG', 'Current Inventory', 'Last Tank Reading', and 'Movement'. The 'Basic Info' tab is active, showing fields for Tank ID, Location ID, Fuel/fluid type, Tank capacity, Reorder point, Preferred vendor ID, and an 'Underground tank' checkbox with an associated 'Underground account' field. The 'Insert' button in the toolbar is highlighted with a yellow background.

Ready

Rec: ___ of ___



Fueling – External Fuel Tickets

Data → Equipment Activity → Fueling → External Fuel Tickets

FleetFocus - [External Fuel Tickets]

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

Row

External Fuel Ticket Entry

External fuel tickets

Row	Equipment ID	Transaction date	License number	Year - manufacturer - model - meter readings							
				Meter 1 reading	Meter 1 validation	Meter 2 reading	Meter 2 validation	Reversal	Fuel type	Fuel qty	Fuel cost
				Fluid type	Fluid qty	Fluid cost	Misc cost	Account ID	Back out fuel tax		
				State or province	Employee/operator ID	Vendor ID	Currency ID	Comments			

Ready

Rec: ___ of ___
NUM



Fueling – External Fuel Tickets

State of Texas Required Fields

FleetFocus Field Name	State of Texas Required Data	Definition
Fuel Type	Fuel Type Used	Type of fuel purchased. Select appropriate fuel type from choice list provided: BDL – Biodiesel CNG – Compressed Natural Gas DSL – Diesel ELE – Electricity ETH – Ethanol GAS – Gasoline LPG – Propane MET - Methanol
Fuel Quantity	Fuel Quantity	Enter quantity of fuel purchased in gallons or gallon equivalents.
Fuel Cost	Fuel Cost	Total cost of fuel purchased. Enter cost of fuel purchased for external fuel tickets only.



Fueling – External Fuel Tickets

State of Texas Required Fields

FleetFocus Field Name	State of Texas Required Data	Definition
Fluid Type	Incidental Lubricants	Lubricants used during preventative maintenance and repairs, such as engine oil, transmission fluid and brake fluid. Select appropriate fluid type from choice list provided: Engine Oil Auto Trans Fluid Antifreeze Brake Fluid Gear Oil Air Cond Fluid
Fluid Quantity	Incidental Lubricant Quantity	Quantity of lubricants used during preventative maintenance and repair work. Enter fluid quantity purchased.
Fluid Cost (External Fuel Tickets)	Incidental Lubricants Cost	Cost of lubricants used during preventative maintenance and repair work. Enter cost of fluids purchased for external tickets.



Fueling – Internal Fuel Tickets

Data → *Equipment Activity* → *Fueling* → *Internal Fuel Tickets*

FleetFocus - [Internal Fuel Tickets]

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

Internal Fuel Ticket Entry

Internal fuel tickets

Row	Equipment ID	Transaction date	License number	Year - Manufacturer - Model - Meter readings												
				<table border="1"> <thead> <tr> <th>Meter 1 reading</th> <th>Meter 1 validation</th> <th>Meter 2 reading</th> <th>Meter 2 validation</th> <th>Reversal</th> <th>Tank ID</th> </tr> </thead> <tbody> <tr> <td></td> <td></td> <td></td> <td></td> <td></td> <td></td> </tr> </tbody> </table>	Meter 1 reading	Meter 1 validation	Meter 2 reading	Meter 2 validation	Reversal	Tank ID						
Meter 1 reading	Meter 1 validation	Meter 2 reading	Meter 2 validation	Reversal	Tank ID											

Ready

Rec: ___ of ___



Fueling – Internal Fuel Tickets

State of Texas Required Fields

FleetFocus Field Name	State of Texas Required Data	Definition
Fuel Type	Fuel Type Used	Type of fuel purchased. Select appropriate fuel type from choice list provided: BDL – Biodiesel CNG – Compressed Natural Gas DSL – Diesel ELE – Electricity ETH – Ethanol GAS – Gasoline LPG – Propane MET - Methanol
Fuel Quantity	Fuel Quantity	Enter quantity of fuel purchased in gallons or gallon equivalents.



Fueling – Internal Fuel Tickets

State of Texas Required Fields

FleetFocus Field Name	State of Texas Required Data	Definition
Fluid Type	Incidental Lubricants	Lubricants used during preventative maintenance and repairs, such as engine oil, transmission fluid and brake fluid. Select appropriate fluid type from choice list provided: Engine Oil Auto Trans Fluid Antifreeze Brake Fluid Gear Oil Air Cond Fluid
Fluid Quantity	Incidental Lubricant Quantity	Quantity of lubricants used during preventative maintenance and repair work. Enter fluid quantity purchased.
Misc. Cost (Internal Fuel Tickets)	Incidental Lubricants Cost	Cost of lubricants used during preventative maintenance and repair work. Enter cost of fluids, if known, for internal tickets.

Meter Readings – Assignments – Usage

Data → *Equipment Units* → *Usage* → *Meter Readings – Assignments – Usage* (Meter Readings tab)

1. Click here to **Prepare for Insert.**

The Date and time entered/displayed here will be the default for each row entered

2. Enter the **Equipment ID.**

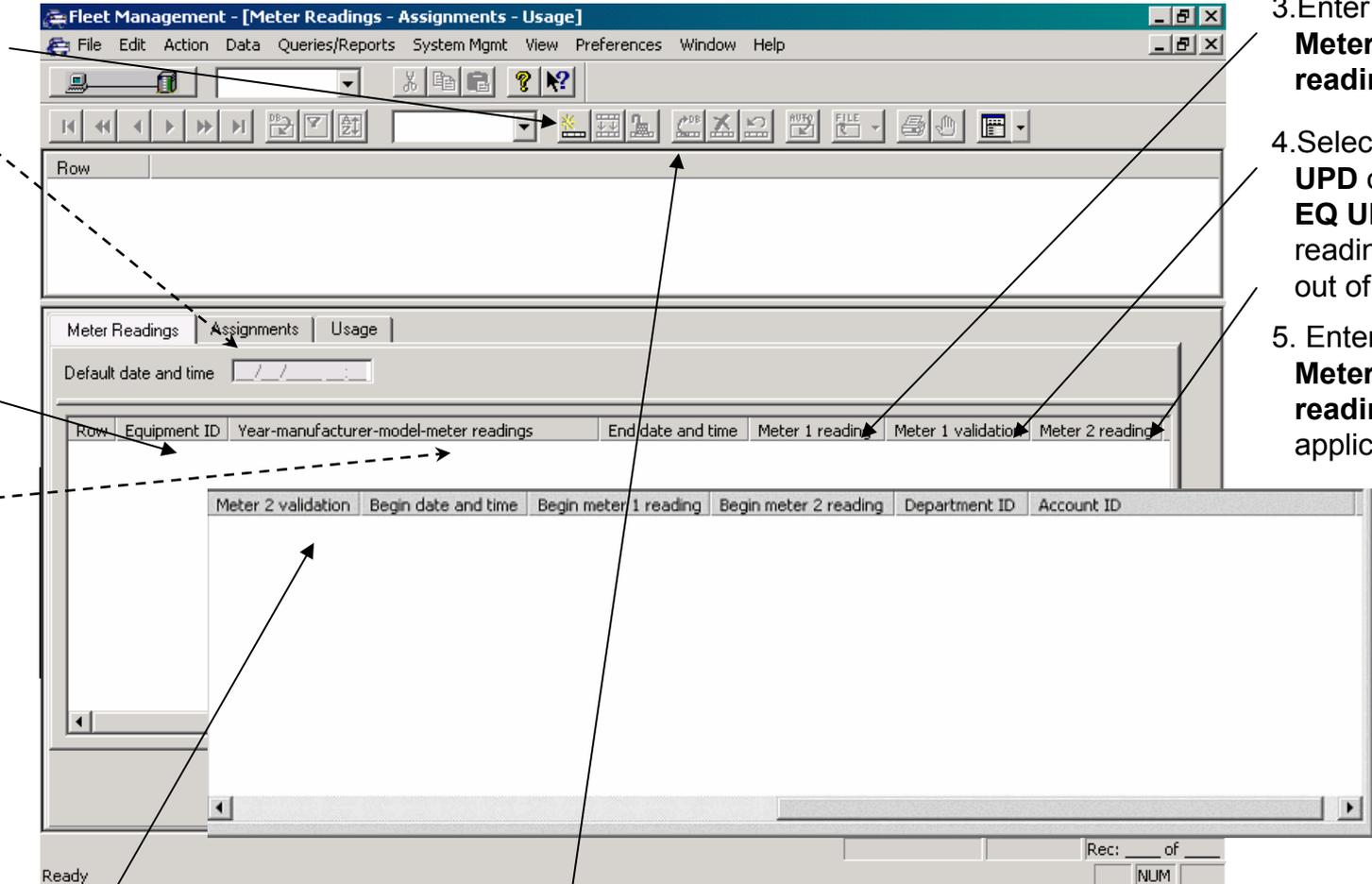
Current Year, Manufacturer, Model and meter reading display.

End date and time defaults to system date/time.

3. Enter the **Meter 1 reading.**

4. Select **EQ UPD** or **NO EQ UPD** if reading is out of range

5. Enter the **Meter 2 reading** (if applicable).



6. Select **EQ UPD** or **NO EQ UPD** if reading is out of range

7. Click here to **Process.**



Meter Readings – Assignments – Usage

State of Texas Required Fields

Monthly Meter Readings

FleetFocus Field Name	State of Texas Required Data	Definition
End Date and Time	Odometer Reporting Date	Change default date to last day of month being entered.
Meter 1 Reading	Odometer Reading	Enter ending odometer reading.

Vehicle Disposal Meter Readings

FleetFocus Field Name	State of Texas Required Data	Definition
End Date and Time	Date and Time of Vehicle Disposal	Change default date to date of vehicle disposal.
Meter 1 Reading	Odometer Reading at Disposal	Enter odometer reading at time of disposal.

Usage Tickets

Data → *Equipment Activity* → *Usage* → *Usage Tickets*

The purpose of the Usage Tickets screen is to display and insert equipment usage transactions.

5. Click here to **Process**

1. Click here to **Prepare for Insert.**

2. Enter the **Equipment ID.**

Transaction Date and time displayed will default to the system date and time

Current Year, Manufacturer, Model and meter reading display.

3. Select **Department ID** from the choice list.

4. Enter **Trips** and/or **Passengers**



Usage Tickets

State of Texas Required Fields

FleetFocus Field Name	State of Texas Required Data	Definition
Trips	Number of Trips	<p>Total number of trips vehicle completes during month. Enter the total number of trips completed during the month. Number of passengers can be entered at the same time on the same entry line.</p> <p>The following fields must also be completed to process the record:</p> <p>Equipment ID</p> <p>Transaction Date (should match end of month during which trips occurred.)</p> <p>Department ID</p>
Passengers	Number of Passengers	<p>Number of passengers transported in the vehicle during the month. Enter total number of passengers transported during the month. Number of trips for the month can be entered at the same time on the same entry line.</p> <p>The following fields must also be completed to process the record:</p> <p>Equipment ID</p> <p>Transaction Date (should match end of month during which trips occurred.)</p> <p>Department ID</p>



FleetFocus FA's Work Order Center

Data → Shop Activity → Work Order Center

FleetFocus - [Work Order Center]

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

Row Work order location ID Work order year Work order number Job status Equipment ID Job type Priority ID Date and time opened Date and time in Da

Output Control Labor Parts Commercial Delay Tools Current Labor Assignments Summary Cost Info

Basic Info More Info Messages Comments Notes Standard Jobs Tasks Service Requests/Defects Estimating

Work order ID [] [] [] Equipment ID [] Job status OPEN Current work delay ID []

Job type REPAIR PM Equipment ID [] License number [] Date and time out of service [] [] []
 Date and time in [] [] []

Meter 1 [] Meter 1 validation [] Life meter 1 usage [] Date and time due [] [] []
 Meter 2 [] Meter 2 validation [] Service status [] Date and time opened [] [] []

Account ID [] Date and time first labor [] [] []
 Priority ID [] Shop downtime begin [] [] []
 Tech/vendor [] Shop downtime end [] [] []

Repair reason ID [] PM service [] User downtime begin [] [] []
 Repair site [] PM scheduled [] [] [] [] []
 Work class [] User downtime end [] [] [] [] []
 Warranty work UNKNOWN Date and time finished [] [] []
 YES Date and time closed [] [] []
 NO Estimate Approved Date and time in service [] [] []

Ready Rec: ___ of ___



Work Order Center Communication

Data → Shop Activity → Work Order Center

Messages tab:
FleetFocus FA messages about the Equipment ID

Comments tab:
Your messages to other users about the Work Order

Service Requests tab:
Information from other users about the Equipment ID



Work Order Screens

Work Order Center – This is the most comprehensive work order screen in FA. All data about a work order is displayed on this screen. Use this screen to view existing information about an open work order, or to open work orders. When creating new work orders this screen works best if the work order is open before work begins on the vehicle. No Labor, Parts or Commercial Charges can be posted to a work order on this screen until the work order is processed for the first time.

Work Order Short Form – Use this screen to create work orders after the work has already been completed by technicians or outside vendors. A user can create a work order, add parts labor and commercial transactions, and finish the work order all in a single process.

Parts Issues and Returns – Use this screen to post parts issues to multiple work orders during a single process. Parts can only be issued to OPEN or FINISHED work orders. Any parts issues posted to a work order will be visible on the Work Order Center screen after processing. This screen is commonly used by Parts Warehouse users.

Timecards – Use this screen to post both direct and indirect labor entries to multiple work orders in a single process. Labor transactions can only be posted to OPEN or FINISHED work orders. Any labor transactions associated with a work order will be visible on the Work Order Center screen after processing.

Commercial Work Order Charges – Use this screen to post Commercial Sublet work to OPEN or FINISHED multiple work orders in a single process. Any commercial transactions associated with a work order will be visible on the Work Order Center screen after processing.



Work Order Status

OPEN – *Work Order has been created and the vehicle is in the shop. Labor, Parts, and Commercial transactions can be posted.*

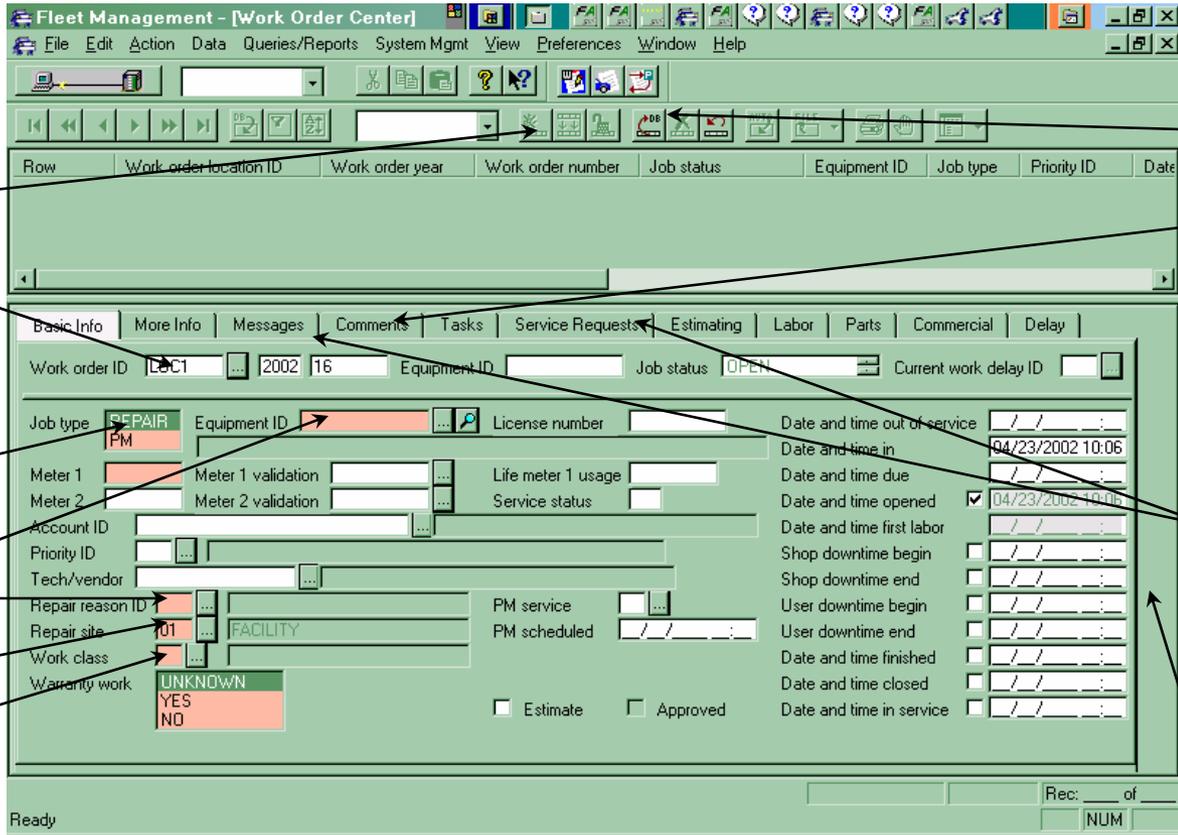
DELAY – *Work Order has been created but is not currently being worked on.*

WORK FINISHED - *Work on the vehicle is complete and can be returned to the customer. Labor, Parts, and Commercial transactions can be posted.*

CLOSED – *All entries and edits to the work order are complete. Work Order is ready to be sent to Billing. Edits are only allowed by System Administrator*

Inserting a New Repair Work Order Using Work Order Center

Data → *Shop Activity* → *Work Order Center*



1. Click here to (**Prepare for**) insert a new work order.

2. Confirm the work order ID

3. Select **REPAIR** as the **Job type**.

4. Enter the **Equipment ID**.

5. Enter the **Repair reason ID**.

6. Enter **Repair site**.

7. Enter the **Work class**.

8. Check if Work is **Warranty related**

12. **Process** the record

11. Type any text you want to print on the work order hard copy on the **Comments** tab.

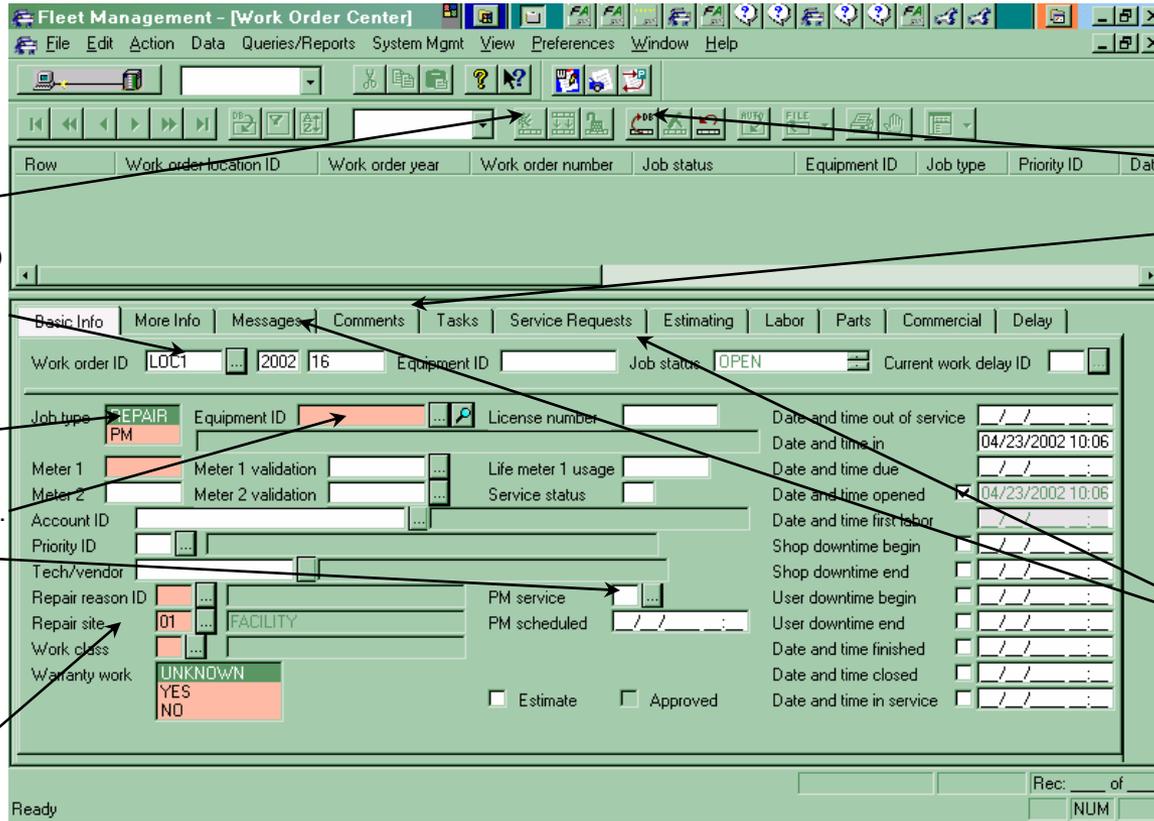
10. Review the **Messages** and the **Service Request** tabs.

9. Ensure that the **dates** are correct

Inserting a New PM Work Order Using Work Order Center

Data → Shop Activity → Work Order Center

1. Click here to **(Prepare for)** insert a new work order.
2. Enter the **Work order ID** FleetFocus FA displays the year and the next sequential number automatically.
3. Select **PM** as the **Job type***
4. Enter the **Equipment ID**.
5. Make sure the **PM Service or Inspection** you want to perform is entered here
6. Complete **Repair Reason, Repair Site, and Work Class**



7. Review the **Messages** and the **Service Request** tabs.
8. Type any text you want to print on the work order hard copy on the **Comments** tab.
9. Click here to **process**.

* Once you select **PM** as the **Job type** and **Equipment ID**, FleetFocus FA automatically displays the current values for **PM service** and **PM scheduled** fields.



Work Order Center – Repair/PM Work Order

State of Texas Required Fields

FleetFocus Field Name	State of Texas Required Data	Definition
Job Type	PM / Repairs	Description of preventative maintenance work and repairs performed. Include maintenance and repairs work on equipment or components permanently attached to vehicle. Select job type (REPAIR or PM).
Repair Reason ID	PM / Repairs	Select repair reason ID from choice list provided: B – Breakdown: Other than routine wear and tear C – Wear and Tear: Routine part replacement D – Damaged in Operation: Damaged as a result of specific work performed E – Noted in PM: Preventative maintenance F – Make Ready: Work in preparation for initial use G – Seasonal Prep: Work in preparation for seasonal use H – Vandalism: Intentional damage I – Inspection: Routine inspection J – Other: Use for weather related damage only K – Statutory: Statutorily required repairs, conversions or upgrades L – Disposal: Work in preparation for disposal M – Capital: DO NOT USE N – Accident Employee at Fault R – Recall/Service Bulletin: Manufacturer recall work W – Car Wash: Routine as needed



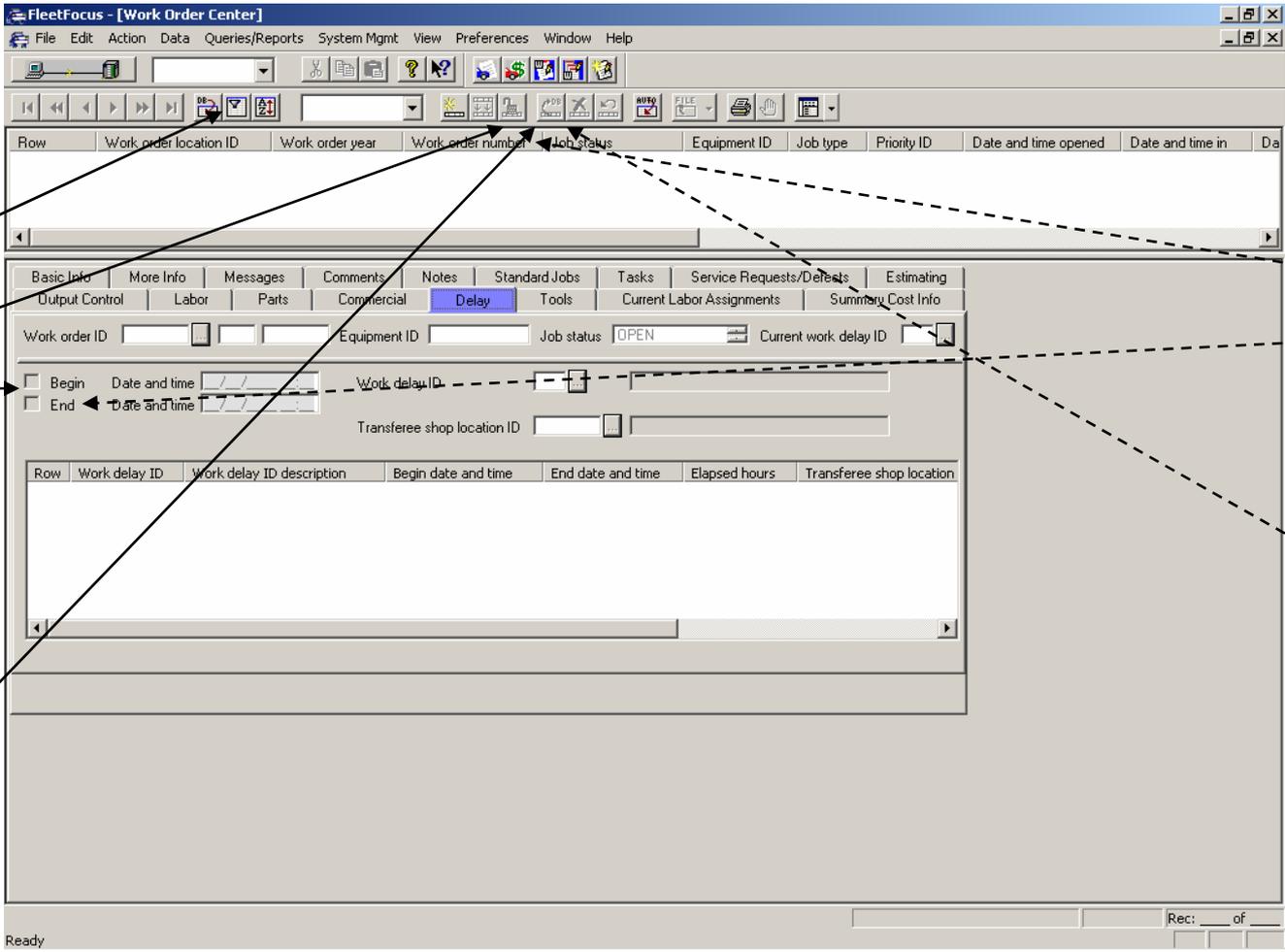
Work Order Center – Repair/PM Work Order

State of Texas Required Fields

FleetFocus Field Name	State of Texas Required Data	Definition
Repair Reason ID	Accident Repair Expense	Total cost to repair damage due to an accident. Select Accident – Employee Not at Fault (A) or Accident –Employee at Fault (N) as appropriate from choice list provided.
Repair Reason ID	Incident Repair Expense	Total cost to repair damage unrelated to normal use of vehicle, such as vandalism, hail damage or flood damage. Select Vandalism (H) or Weather Related Damage (J) from choice list provided.
Repair Site	PM / Repairs Facility	<p>Type of shop where the preventative maintenance or repair work was performed: commercial, in-house or interagency. Select repair site from choice list provided:</p> <ul style="list-style-type: none"> 01 Facility - In house Shop 02 Field - Roadside Repair/Maintenance 03 Terminal - Interagency Contract Shop 04 Outside Company - Commercial Shop
Date and Time In/Date and Time Finished	PM / Repairs Time	Time between receipt of vehicle at maintenance facility and completion of work. Enter date and time vehicle was received at maintenance facility and date and time maintenance or repair work was completed. Complete as many date and time fields as possible and appropriate work performed.

Work Order Center - Delay

Data → Shop Activity → Work Order Center



- To Begin Delay:
- Filter for the **Work Order** that will be placed in Delay
 - Unlock the record
 - On the Delay tab check the **Begin** box
- The Date and time field will default to the system date and time.*
4. Choose a **Work Delay ID** from the list provided.
 5. Process the change

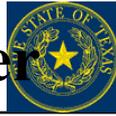
- To End Delay:
- Filter for the **Work Order** that will be taken out of Delay
 - Unlock the record
 - On the Delay tab check the **End** box
- The Date and time field will default to the system date and time.*
4. Process the change.
- A row will be placed in the group field below noting the details of the delay.*



Work Order Center - Delay

State of Texas Required Fields

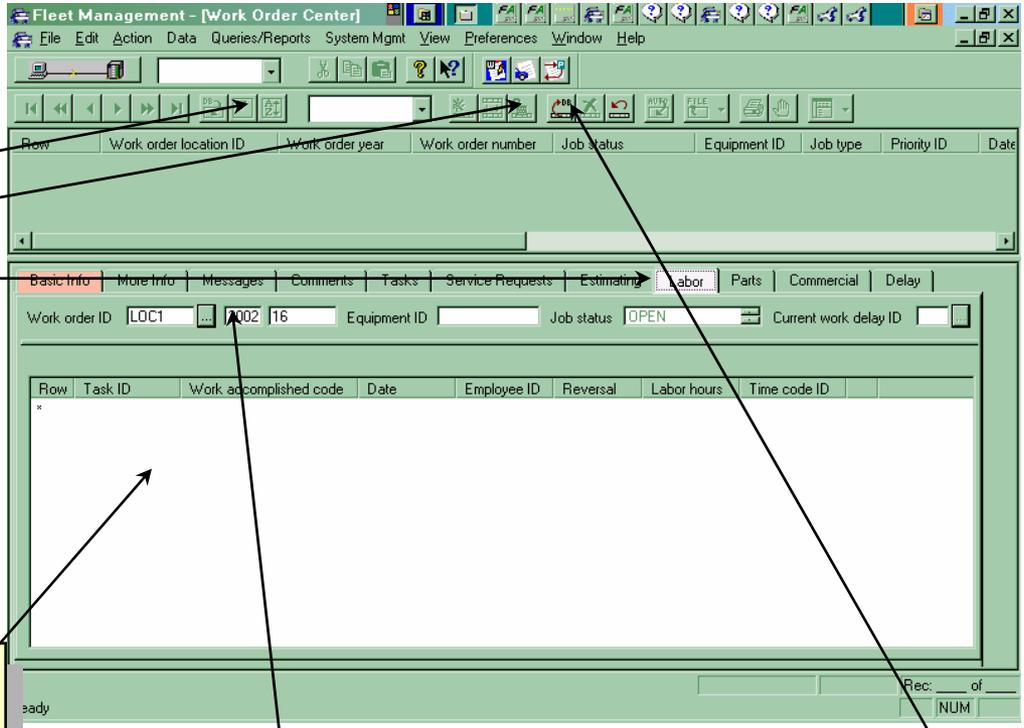
FleetFocus Field Name	State of Texas Required Data	Definition
Begin/End/Work Delay ID	Downtime	<p>Total time vehicle was out of use during repair or maintenance work, including transfer time before and after work is conducted. Complete information fields in delay tab as appropriate. Select type of delay from choice list provided for work Delay ID field.</p> <p>B - Waiting bay L - Waiting labor M - Waiting commercial P - Waiting parts T - Waiting tow TS - Transfer shop responsibility TU - Transfer user responsibility Z - Waiting other</p>



Posting Labor to a Work Order Using the Work Order Center

Data → Shop Activity → Work Order Center

- 1. Use the **Filter** to limit the display to the work order you want.
- 2. Click here to unlock the work order.
- 3. Click the **Labor** tab.



- 4. Enter **Task ID**.
- 5. Enter **Work Accomplish Code**
- 6. Check that the date is correct (this field defaults to today's date).
- 7. Enter **Employee ID of person who performed the labor**
- 8. Mark if the entry is a reversal (this is used to correct mistakes previously saved)
- 9. Enter the number of hours worked on this task.
- 10. Enter the Time code

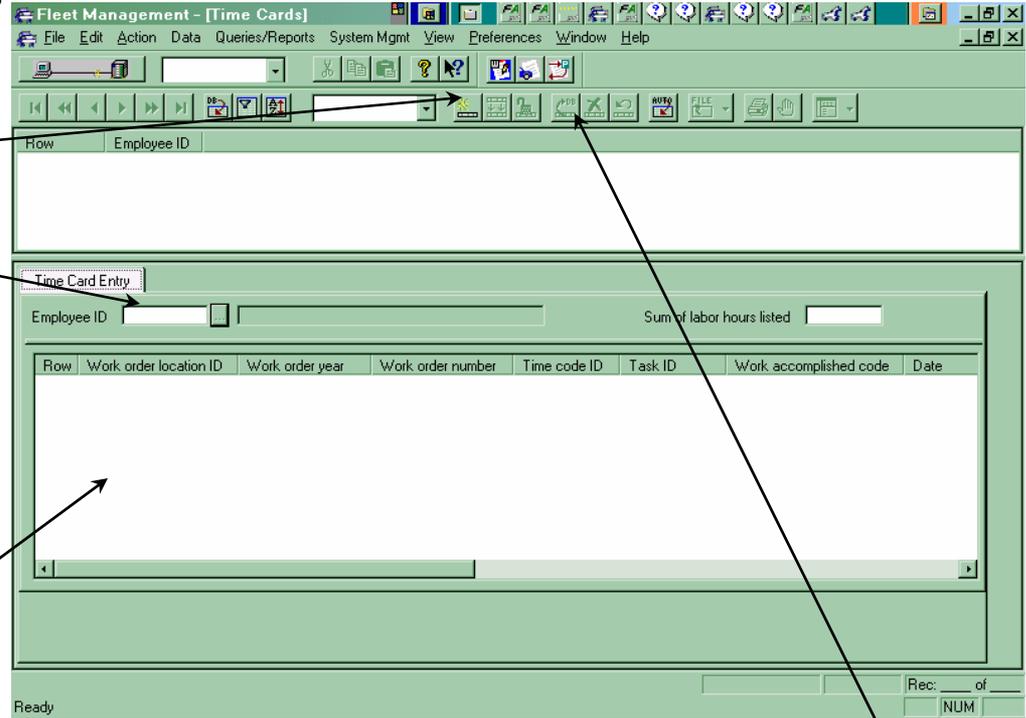
- 11. Go to the Comments tab to end and final comments about the work order.
- 12. Click here to process.



Posting Labor to a Work Order Using the Timecards Screen

Data → Shop Activity → Work Order Center

1. Click the Prepare for **Insert** button
2. Enter the **Employee ID**



Labor

3. Enter **Work Order Location, Year, and Number** (needed only if posting time to a direct Time Code)
 - Enter **Time Code**
 - Enter **Task ID**
 - Enter **Work Accomplish Code**
7. Check that the **Date** is correct (this field defaults to today's date).
8. Mark if the entry is a **reversal** (this is used to correct mistakes previously saved)
9. Enter the number of **hours** worked on this task.

12. Click here to **process**.



Work Order Center – Labor Posting

State of Texas Required Fields

FleetFocus Field Name	State of Texas Required Data	Definition
Labor hours, Employee ID	PM / Repairs Cost	Total cost of maintenance and repair work conducted. Labor costs should be itemized. Include maintenance and repair costs related to equipment or components permanently attached to vehicle. For Internal Shop select Labor tab. Enter labor hours and employee ID.



Work Order Center – Labor Rate Setup

Data → *Shop Activity* → *Setup* → *Employees* → *Primary Information (Rates tab)*

The screenshot shows the 'FleetFocus - [Employees - Primary Information]' window. The menu bar includes File, Edit, Action, Data, Queries/Reports, System Mgmt, View, Preferences, Window, and Help. The toolbar contains various icons for file operations and data management. Below the toolbar is a table with columns: Row, Employee ID, Name, Address line 1, Address line 2, Address line 3, and Address line 4. The table is currently empty. Below the table are several tabs: Personal Info, Assignment Info, Authority Info, Employment Info, Classifications, Rates (selected), Skills, and Scheduling. The 'Rates' tab contains the following fields:

- Employee ID:
- Pay rate:
- Standard charge:
- Overtime charge:
- Default time code ID for work order charges:

The status bar at the bottom left shows 'Ready' and the bottom right shows 'Rec: ___ of ___'.



Work Order Center – Labor Rate Setup

State of Texas Required Fields

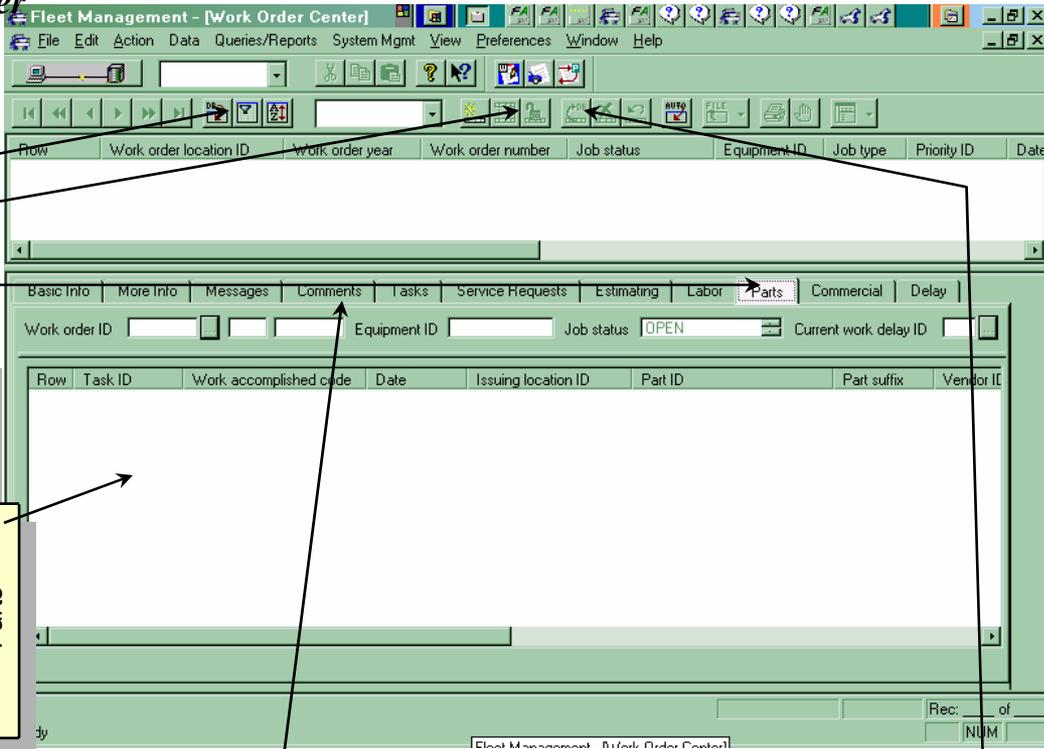
FleetFocus Field Name	State of Texas Required Data	Definition
Pay Rate	Standard Labor Rate	Standard labor rate of maintenance and repair work completed at agency shop. Enter the standard hourly rate for each employee in an agency shop.



Posting Parts to a Work Order Using the Work Order Center

Data → Shop Activity → Work Order Center

1. Use the **Filter** to limit the display to the work order you want.
2. Click here to **unlock** the work order.
3. Click the **Parts** tab.



4. Enter **Task ID**.
5. Enter **Work Accomplish Code**
6. Check that the **Date** is correct (this field defaults to today's date).
7. Pick the correct **Issuing Location**
8. Enter or pick the **Part ID**
9. Enter **0** for **Part Suffix**
10. Enter or pick the **Vendor**
11. If this is a Contract Part, enter or pick the **Contract #**
12. Mark if the entry is a **Reversal** (this is used to correct mistakes previously saved)
13. Enter the **Quantity Issued**
14. Verify **Unit Price** and **Parts Description**

15. Go to the **Comments** tab to end and final comments about the work order.
16. Click here to **process**.



Work Order Center – Parts Posting

State of Texas Required Fields

FleetFocus Field Name	State of Texas Required Data	Definition
Part ID, Quantity Issued	PM / Repairs Cost	Total cost of maintenance and repair work conducted. Parts costs should be itemized. Include maintenance and repair costs related to equipment or components permanently attached to vehicle. Select Parts tab and enter part ID, quantity issued and unit price.

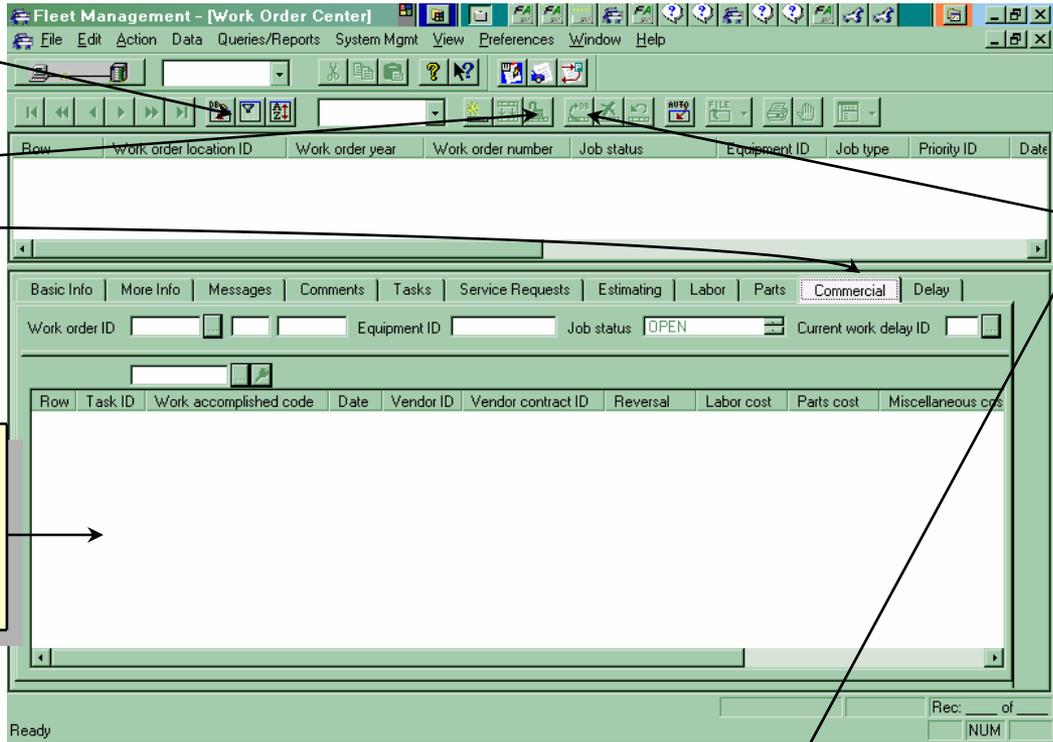
Posting Commercial Charges Using Work Order Center

Data → *Shop Activity* → *Work Order Center*

1. Use the **Filter** to limit the display to the work order you want.
2. Click here to **unlock** the work order.
3. Click the **Commercial** tab.

4. Enter the **Task ID**.
FleetFocus FA fills the Date field with today's date
5. Indicate **Reversal**.
6. Enter **Labor cost**, and check the box if cost is taxable.
7. Enter **Parts cost**, and check the box if cost is taxable.
8. Enter **Misc Cost**
9. Enter **Vendor invoice** number.
10. Enter **Vendor's work order** number.
11. Enter **Vendor contract ID**.

Group Control



12. Click here to **process**.

Posting Commercial Charges to a Work Order

Data → Shop Activity → Commercial Work Charges

1. Click here to **Prepare for insert**.
2. Enter **Vendor ID**.
3. Enter the three-part Work order ID (**Work order location ID, Work order year, and Work order number**).
FleetFocus FA displays the Equipment ID.
4. Enter **Task ID and Work Accomplish Code**.
FleetFocus FA fills the Date field with today's date
5. Indicate **Reversal**.
6. Enter **Labor cost**
7. Enter **Parts cost**
8. Enter **Misc cost**
9. Enter **Vendor invoice** number.
10. Enter **Vendor's work order** number.
11. Enter **Vendor contract ID**.

Group Control

The screenshot shows the 'Fleet Management - [Commercial Work Charges]' application window. The menu bar includes File, Edit, Action, Data, Queries/Reports, System Mgmt, View, Preferences, Window, and Help. The toolbar contains various icons for file operations and data management. The main window displays a 'Commercial Work Charges Entry' form with a 'Vendor ID' field at the top. Below it is a table with columns: Row, Work order location ID, Work order year, Work order number, Equipment ID, Task ID, Work accomplished code, and Date. A 'Group Control' label on the left points to the bottom of the form. In the bottom right corner, there is a 'Rec: ___ of ___' label and a 'NUM' field. A 'Process' button is located in the bottom right corner of the form area.

12. Click here to **process**.



Work Order Center – Commercial Posting

State of Texas Required Fields

FleetFocus Field Name	State of Texas Required Data	Definition
Labor Cost, Parts Cost	PM / Repairs Cost	Total cost of maintenance and repair work conducted. Parts and labor costs should be itemized. Include maintenance and repair costs related to equipment or components permanently attached to vehicle. Select Commercial Vendor. Enter labor cost and parts cost.



Closing a Work Order

Data → Shop Activity → Work Order Center

1. Use the **Filter** to limit the display to the work order you want.

2. Click here to **unlock** the work order.

3. Review the **Parts, Labor, Commercial, and Comments** tabs

4. Click the box next to **Date and Time Closed**

5. Click here to **process**.



Reports

Section VI



Section VI Contents

Topic

Page

- 1. **Reports Choice List**
- 2. **Printer Icon Button**

152
157

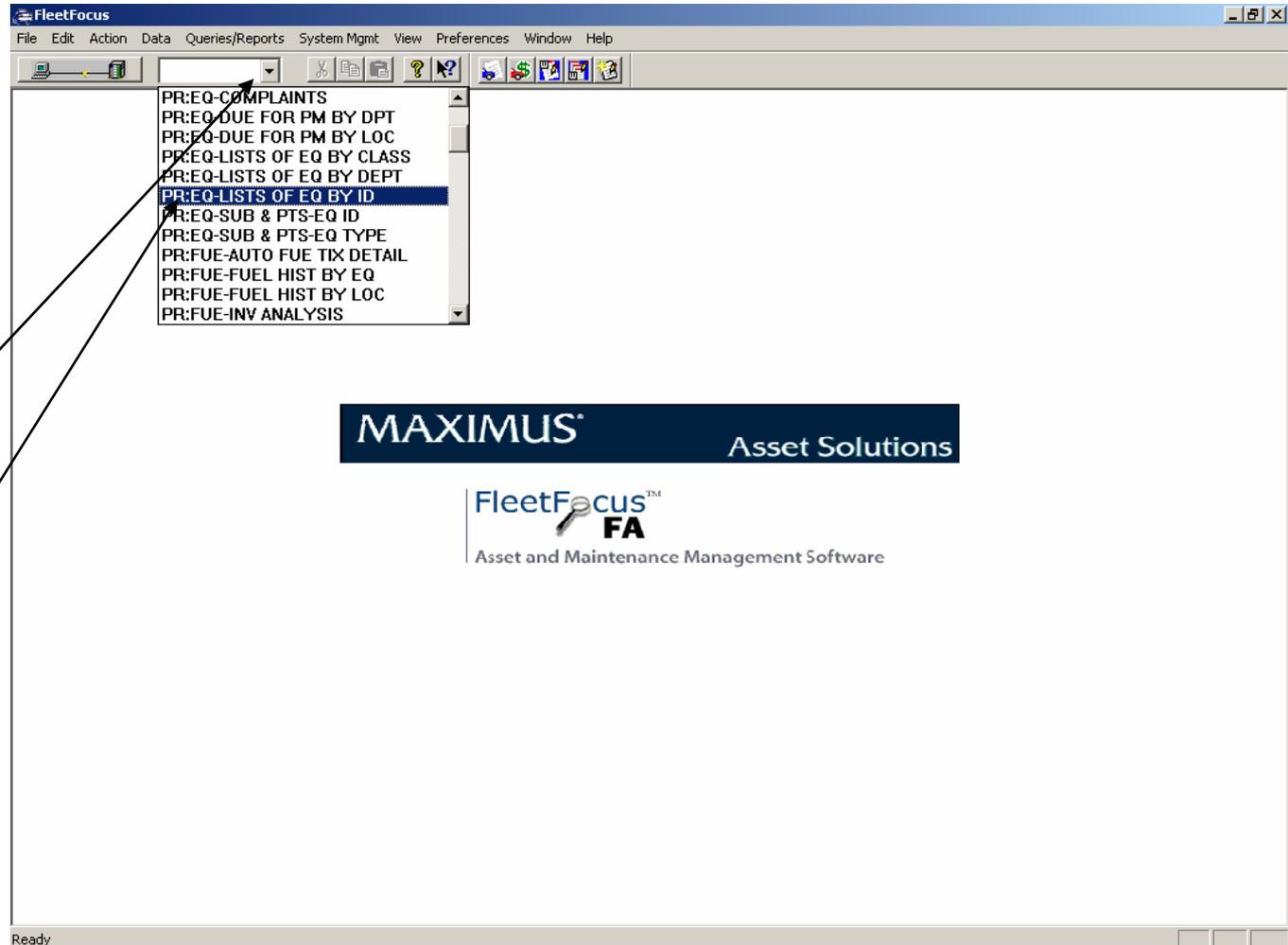


Running a Report – the Reports Choice List

Reports that the users have access to run will appear in the reports choice list

In order to run a report the user will do the following:

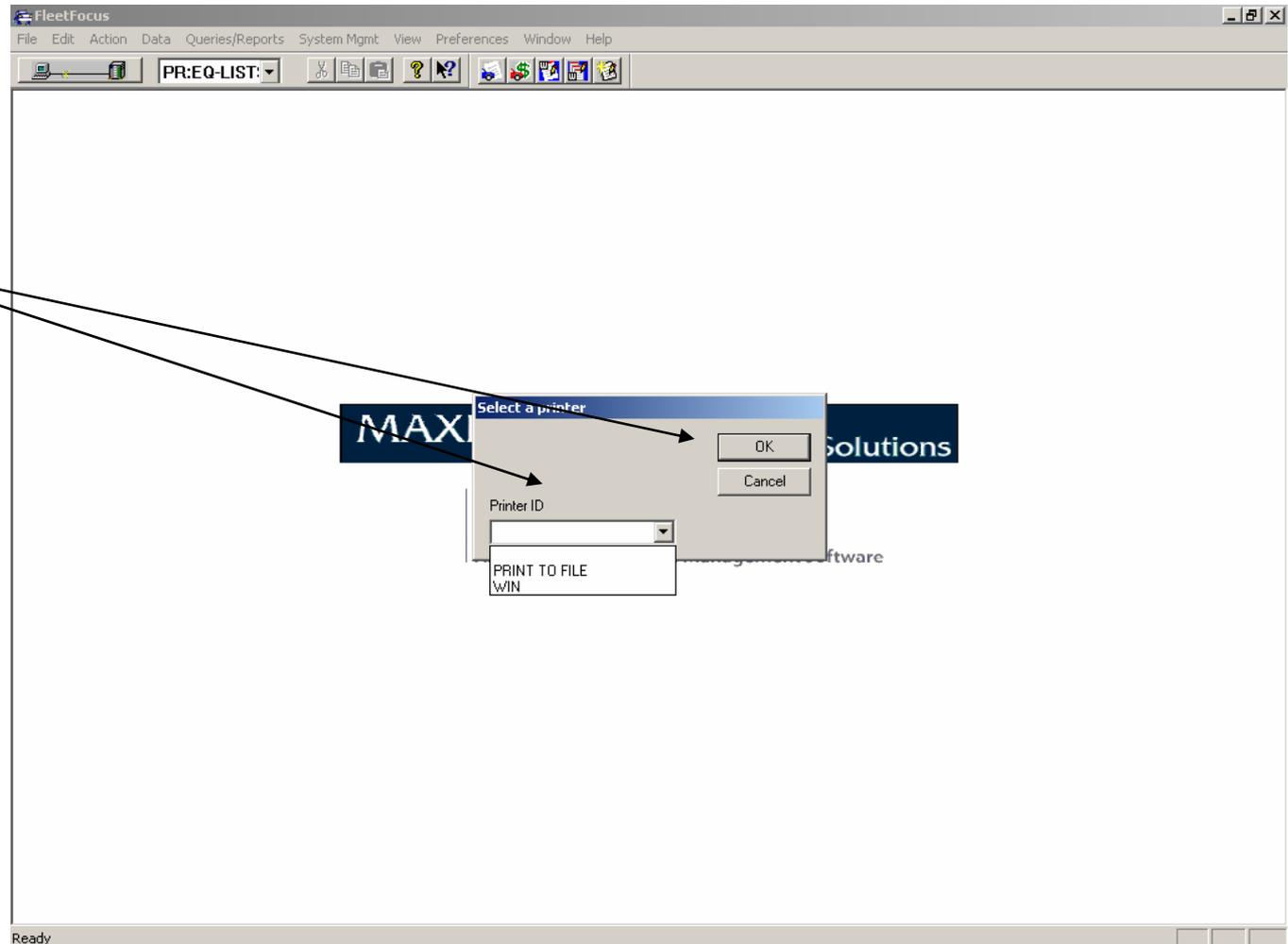
1. Click the downward arrow on the choice list box.
2. Highlight the report they want to run and click on it.



Running a Report – the Reports Choice List (*continued*)

3. When the Select Printer box comes up the user selects a printer from the list and clicks OK.

Note: if no printer is chosen, the output will be displayed onscreen.

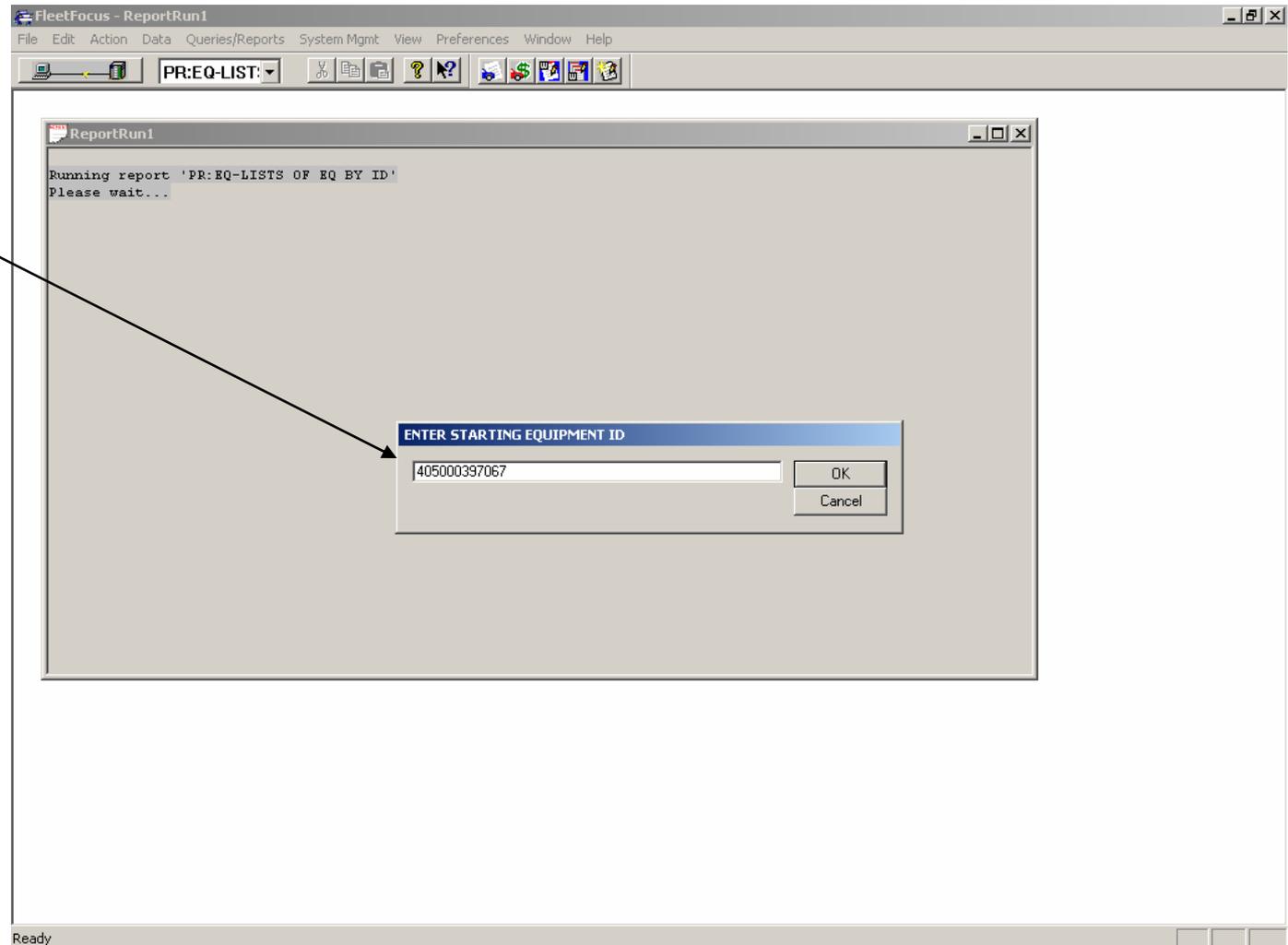


Ready

Running a Report – the Reports Choice List (*continued*)

4. The user enters values for the prompts as appropriate.

Note: Most reports will prompt the user for at least one value. To review prompts for any of the FleetFocus standard reports, please consult the Directory of Standard Reports in the Doc directory on any FleetFocus CD





Running a Report – the Reports Choice List (continued)

Report Output Options

If no printer is specified when the user runs the report, the output will be displayed onscreen

FleetFocus - [ReportRun2]

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

PR:EQ-LIST: [Printer Icon] [Copy Icon] [Paste Icon] [Help Icon] [Print Icon] [Refresh Icon] [Close Icon]

Report Date & Time: 07/31/2003 00:12 Page 1

Equipment Inventory List by Equipment ID

Equip ID/ Description	Department	Maint Class	Fuel Type	License Number	PH Loc	Year	Manufacturer	Model	Serial No	Type
40500039 UTILITY 2-WHEEL DRIVE	2	707	GAS	836373	405000	2003	CHEV	BLAZER	1GNCS13X53K161403	2003CHEVBLAZE
40500039 UTILITY 2-WHEEL DRIVE	2	707	GAS	836374	405000	2003	CHEV	BLAZER	1GNCS13X63K161930	2003CHEVBLAZE
40500039 FULL SIZE 4-DR SEDAN	2	701	GAS	836422	405000	2004	DODG	INTREPID	2B3HD46R94H630039	2004DODGINTRE
40500039 FULL SIZE 4-DR SEDAN	2	701	GAS	836423	405000	2004	DODG	INTREPID	2B3HD46R74H630041	2004DODGINTRE
40500039 FULL SIZE 4-DR SEDAN	2	701	GAS	836424	405000	2004	DODG	INTREPID	2B3HD46R74H630038	2004DODGINTRE
40500039 FULL SIZE 4-DR SEDAN	2	701	GAS	836427	405000	2004	DODG	INTREPID	2B3HD46R34H630036	2004DODGINTRE

=====
6 Equipment Units Total
=====

-----END OF REPORT-----

Ready



Running a Report – the Reports Choice List (continued)

Report Output Options

If the user has access to a text file printer, the output will end up in a text file on the user's machine.

This text file can be opened by any text editing program, such as Notepad or Wordpad.

Note: Please consult your administrator if you do not know the location and/or name of the text file output FleetFocus creates.

FA_REPORT.TXT - Notepad

File Edit Format Help

Report Date & Time: 07/31/2003 00:19 Page 1

Equipment Inventory List by Equipment ID

Equip ID/ Description	Department	Maint Class	Fuel Type	License Number	PM Loc	Year	Manufacturer	Model	Serial No	Type
40500039 UTILITY 2-WHEEL DRIVE	2	707	GAS	836373	405000	2003	CHEV	BLAZER	1GNCS13X53K161403	2003CHEV
40500039 UTILITY 2-WHEEL DRIVE	2	707	GAS	836374	405000	2003	CHEV	BLAZER	1GNCS13X63K161930	2003CHEV
40500039 FULL SIZE 4-DR SEDAN	2	701	GAS	836422	405000	2004	DODG	INTREPID	2B3HD46R94H630039	2004DODG
40500039 FULL SIZE 4-DR SEDAN	2	701	GAS	836423	405000	2004	DODG	INTREPID	2B3HD46R74H630041	2004DODG
40500039 FULL SIZE 4-DR SEDAN	2	701	GAS	836424	405000	2004	DODG	INTREPID	2B3HD46R74H630038	2004DODG
40500039 FULL SIZE 4-DR SEDAN	2	701	GAS	836427	405000	2004	DODG	INTREPID	2B3HD46R34H630036	2004DODG

=====

6 Equipment Units Total

=====

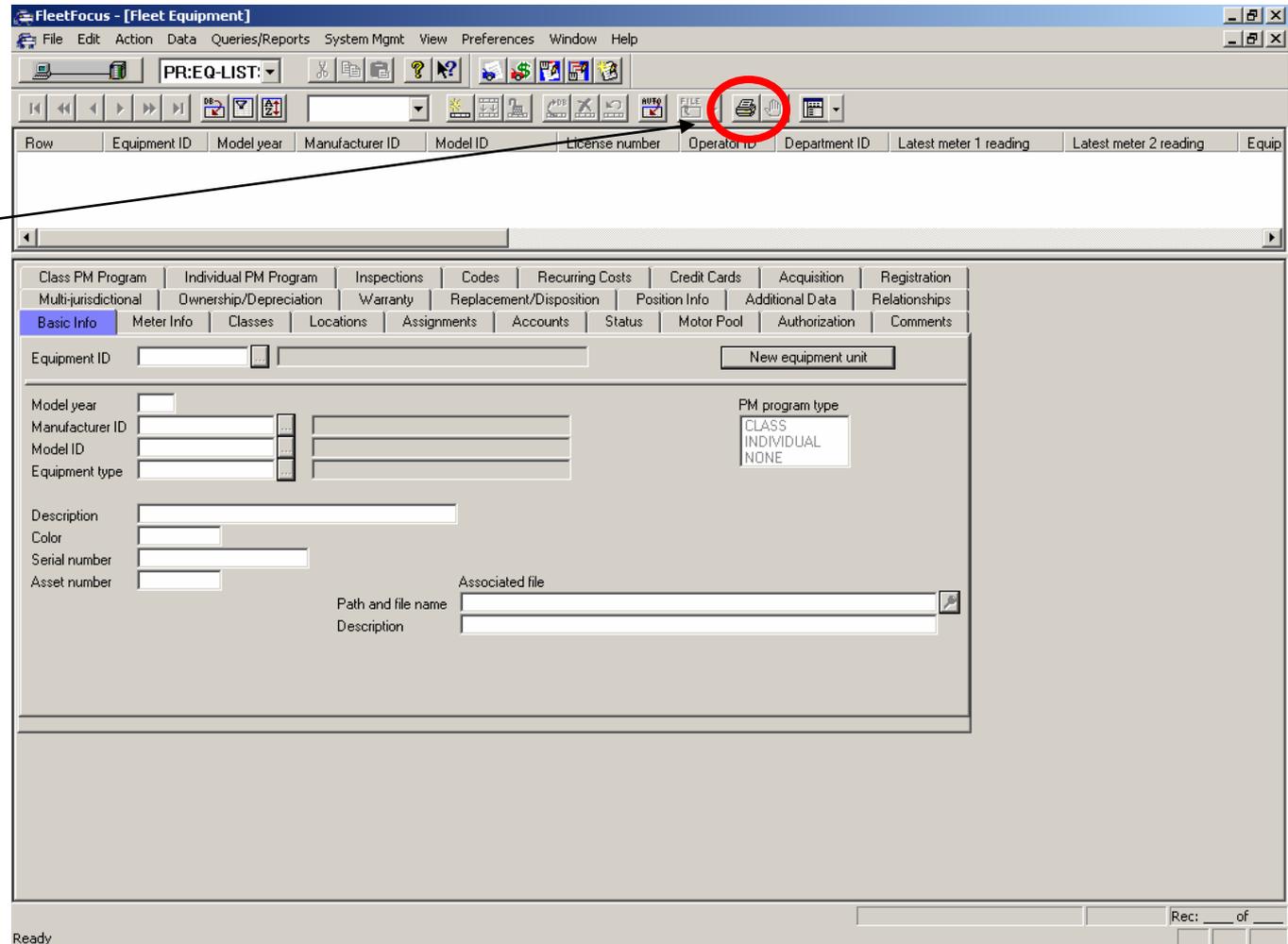
-----END OF REPORT-----

Running a Report – the Printer Icon Button

The Printer Icon Button is located on the Toolbar next to the Data Export button and the “Stop” hand button.

For users who do have access to run reports using this button, it is not active on every screen.

If the button is grayed out it means the user either does not have rights or there is no screen report for that particular screen.





Running a Report – the Printer Icon Button

The screen specific reports that run from the Printer Icon Button use the values entered into the Filter as the prompt values.

In order to run a screen report using the Printer Icon Button, a user must first enter a value or multiple values in the filter and Get Data.

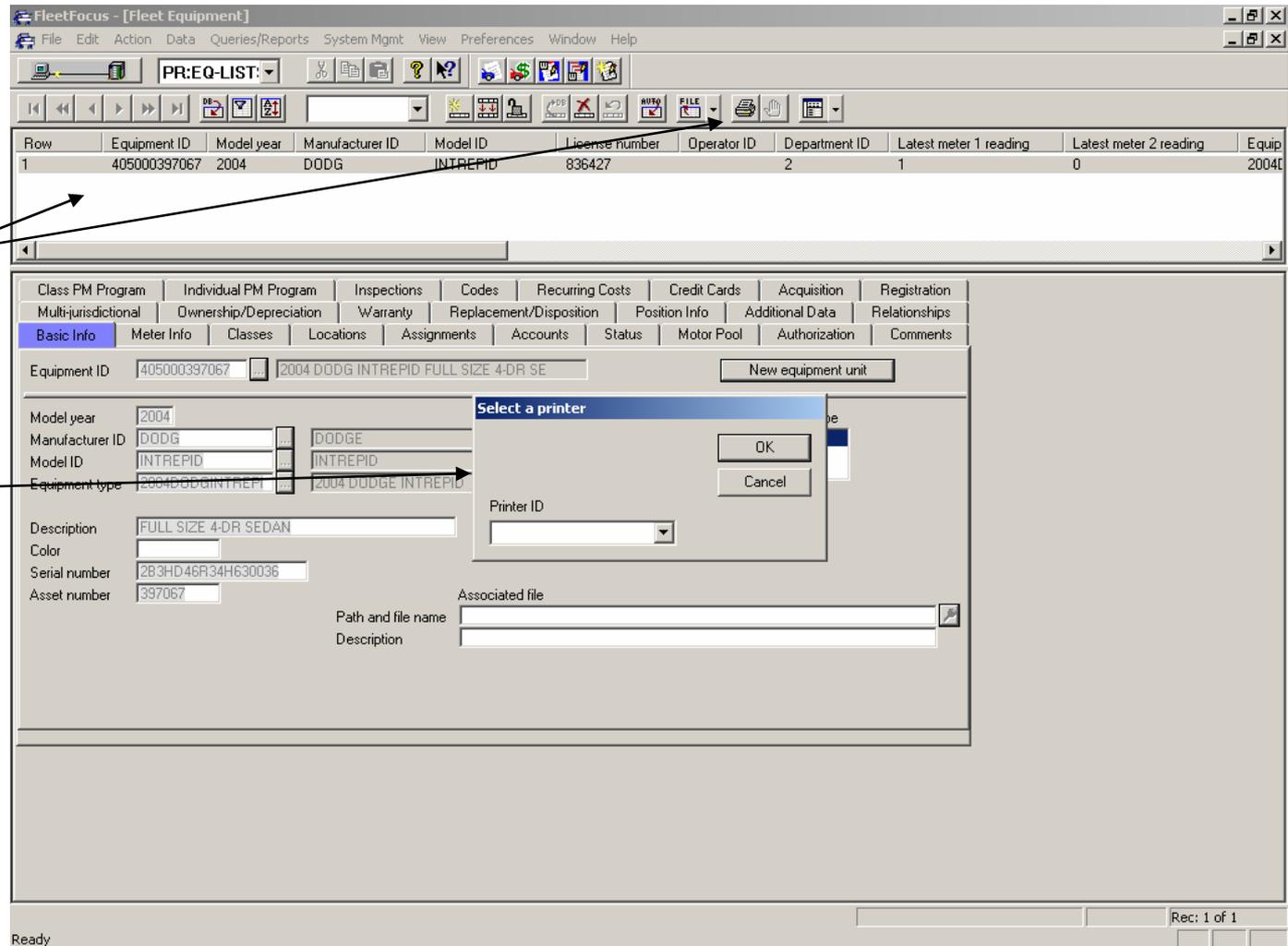
The screenshot shows the FleetFocus application window with a 'Filter' dialog box open. The dialog box contains various fields for filtering data, with 'Equipment ID' set to '405000397067'. The 'Get Data' button is highlighted. In the background, a data table is visible with columns for 'Equipment number', 'Operator ID', 'Department ID', 'Latest meter 1 reading', 'Latest meter 2 reading', and 'Equip'. The first row of data shows values: 427, 2, 1, 0, and 2004. Below the table, there are several menu options including 'Costs', 'Credit Cards', 'Acquisition', 'Registration', 'Position Info', 'Additional Data', 'Relationships', 'Status', 'Motor Pool', 'Authorization', and 'Comments'. A 'New equipment unit' button is also present. The status bar at the bottom right indicates 'Rec: 1 of 1'.

Running a Report – the Printer Icon Button

Once data has been returned to the grid, the user can then click on the Printer Icon Button to run the report.

As with running a report from the Report Choice List, the Select Printer box pops up to allow the user to specify a printer.

Note: Remember that if no printer is specified output will be displayed onscreen.



The screenshot shows the FleetFocus application window with a menu bar (File, Edit, Action, Data, Queries/Reports, System Mgmt, View, Preferences, Window, Help) and a toolbar. A data grid is visible with the following data:

Row	Equipment ID	Model year	Manufacturer ID	Model ID	License number	Operator ID	Department ID	Latest meter 1 reading	Latest meter 2 reading	Equip
1	405000397067	2004	DODG	INTREPID	836427		2	1	0	2004

Below the grid is a form with various tabs: Class PM Program, Individual PM Program, Inspections, Codes, Recurring Costs, Credit Cards, Acquisition, Registration, Multi-jurisdictional, Ownership/Depreciation, Warranty, Replacement/Disposition, Position Info, Additional Data, Relationships, Basic Info, Meter Info, Classes, Locations, Assignments, Accounts, Status, Motor Pool, Authorization, Comments. The 'Basic Info' tab is active, showing fields for Equipment ID (405000397067), Model year (2004), Manufacturer ID (DODG), Model ID (INTREPID), and Equipment type (2004 DODGE INTREPID). A 'Select a printer' dialog box is open, allowing the user to choose a printer from a dropdown menu. The dialog also includes fields for 'Printer ID', 'Associated file', 'Path and file name', and 'Description'. A 'New equipment unit' button is also visible.



Running a Report – the Printer Icon Button

FleetFocus - [ReportRun6]

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

PR:EQ-LIST:

Report Date & Time: 07/31/2003 00:46 Page 1

Equipment Primary List

EQ ID/ Desc	Maint Department Class	Equipment Type	---Assigned---		Year	Manufacturer	Model	Fuel Account ID	
			Loc	PM				Type	Revenue Account ID
40500039 2 FULL SIZE 4-DR SEDAN	701	2004DODGINTREPI	405000	405000	2004	DODG	INTREPID	GAS	

=====
1 Equipment Units Total
=====

-----END OF REPORT-----

Ready

Where to Find Help?

*Keep this training information handy and use it as your **FIRST** reference!*

- Hardware (monitor, keyboard, printer, etc.)
- Network (Novell, IntraNetWare, etc.)
- Don't know?

**Supervisor or
IS Department**

- FASuite (screens, procedures, etc.)
- Data-Related Problems
- State Fleet Requirements/Procedures

**Agency Fleet
Specialist**

- Still stumped?

OVFM

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