

Fleetscape Online User Manual

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Document Purpose

To provide users with a manual for the Vehicle Selection module of Fleetscape, including a step-by-step guide on how to use the Fleetscape system to set up fleet policy and order vehicles online.

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The materials presented in this user manual are distributed by QFleet as an information source only.

This user manual is for Queensland Government employees who have appropriate authorisation for its use.



When you see this information symbol used in this manual additional information and tips about the process will be explained.

Introduction to Fleetscape

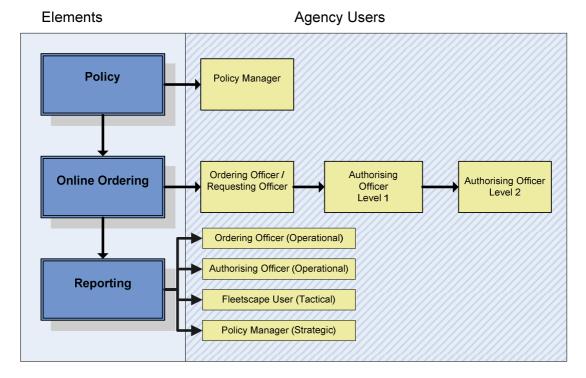
Background

Fleetscape has been developed to provide the Queensland Government and its agencies with best value fleet management.

Roles and Responsibilities

In each agency, a number of key roles are undertaken by staff in the management of the vehicle selection process to ensure compliance with whole-of-Government and agency policy.

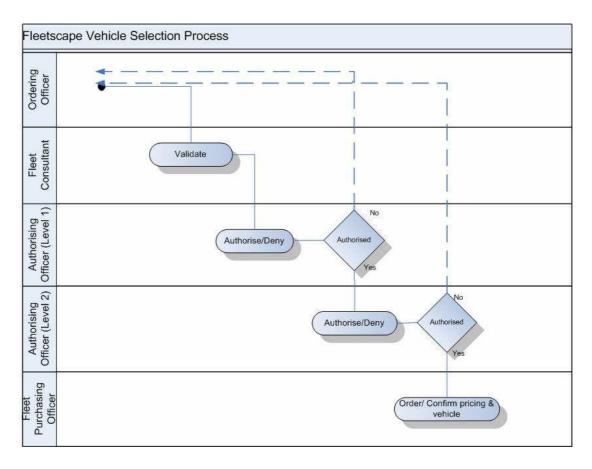
Elements of the system and users are shown below:



The responsibilities of staff undertaking roles in Vehicle Selection Policy element are detailed below:

Role	Responsibility
Agency Policy Manager	 Selection of appropriate task descriptions to match departmental service deliveries.
	 Identification, documentation and maintenance of policies.
	 Maintenance of policies in Fleetscape.
QFleet Policy Manager	 With agency policy managers translate agency policy to business rules in Fleetscape.
	 Conduct quarterly policy review and provide proactive guidance to agency on policy development/amendments.
System Administrator (QFleet)	 Management of the systems security, access, troubleshooting etc.

The diagram below shows the tasks users will perform during the process of Vehicle Selection Online Ordering.



The roles and responsibilities for Vehicle Selection Online Ordering element are detailed below:

Role	Responsibility
Authorising Officer Level 1	 Authorisation of vehicle replacement requests and new vehicle requests.
	 Review of non compliant selection justification consistent with departmental process.
Authorising Officer Level 2	 Delegation for the selection consistent with Policy and Budget.
	 Review and authorisation of an additional vehicle request consistent with budget.
Ordering Officer (Operational Officer)	 Replace vehicles due for return and order new (additional) vehicles.
QFleet Fleet Consultant	 Validation of the quote submitted by the agency ordering officer.
QFleet Fleet Purchasing Officer	 Processing of vehicle orders received from an agency through to the manufacturer.

Key Concepts

Term	Meaning
Service Delivery Description (SDD)	A name chosen by an agency that reflects the service delivery that vehicles are selected to support.
Business Group (BG)	QFleet coding which reflects an agency's organisational hierarchy. For example, the Business Group "G/C2/DPW/QFleet" indicates QFleet is an agency within the Department of Public Works in Portfolio 2 in the Queensland Government.
Operating Environment	The environment in which the vehicle is going to be used. For example, Metro, Regional, Remote.
Duty	Describes the service delivery for which vehicles are going to be used. For example, Admin – Pool, Ops – Emergency Response Vehicle and SES.
Vehicle Selection Rules	Determine the appropriate vehicle configuration/s to meet the service delivery required in a specific operating environment. Vehicle Selection Rules are set in accordance with policy.
Option Rules	Are the accessories selected that complete vehicle configurations.
Matching Vehicles	Vehicles available for lease from QFleet which meet your defined Vehicle Selection Rules and Option Rules defined in the policy process.
Vehicle Duty Statement	Reflects a summary of the service delivery the vehicle will perform.

Glossary

Term	Meaning
Body	Vehicle shape e.g. sedan, wagon.
Business Group (BG)	QFleet coding which reflects an agency's organisational hierarchy. For example, the Business Group "G/C2/DPW/QFleet" indicates QFleet is an agency within the Department of Public Works in Portfolio 2 in the Queensland Government.
Client Code	An overarching code that holds a number of Business Groups.
Duty	Describes the service delivery for which vehicles are going to be used. For example, Admin – Pool, Ops – Emergency Response Vehicle and SES.
FBT	Fringe Benefits Tax.
FMOL	Fully Maintained Operating Lease.
Formal Extension	An extension for a current client of an existing agreement.
Kerridge	QFleet's core operating system.
Make	Vehicle Manufacturer e.g. Ford, Holden.
Matching Vehicles	Vehicles available for lease from QFleet which meet your defined Vehicle Selection Rules and Option Rules defined in the policy process.
Model	Manufacturer's model name e.g. Falcon, Commodore.
Odo	Odometer: the indicator of the number of kilometres the vehicle has travelled.

Operating Environment	The environment in which the vehicle is going to be used. For example, Metro, Regional, Remote.
Option Rules	Accessories selected to complete vehicle configurations.
Segment	Model analysis code.
Service Delivery Description (SDD)	A name chosen by an agency that reflects the service delivery that vehicles are selected to support.
Variant	The definition of a specific vehicle e.g. (Toyota) Camry sedan automatic 4 cylinder.
Vehicle Duty Statement (VDS)	Reflects a summary of the service delivery the vehicle will perform.
Vehicle Registration Duty	A State charge levied on leasing contracts.
Vehicle Selection Rules	Determine the appropriate vehicle configuration/s to meet the service delivery required in a specific operating environment. Vehicle Selection Rules are set in accordance with policy.
Whole-of-life costing	Whole-of-life costing is only an indication of the monthly expected total running costs of the vehicle over the lease term. As a guide, it is intended to allow you to make more informed decisions when evaluating the financial costs of the lease vehicle in question. Whole of life costing will be a sum of the following: Lease Costs; Fuel Costs; Fringe Benefits Tax; and Management Fees (where applicable).

Getting Started



If you require access to Fleetscape, please contact QFleet to obtain a Fleetscape Access Request form. Complete the form and return it to QFleet and a Username and Password will be arranged for you.

If you have access to Fleetscape:

Log into Fleetscape via www.qfleet.qld.gov.au.

The QFleet home page will be displayed:

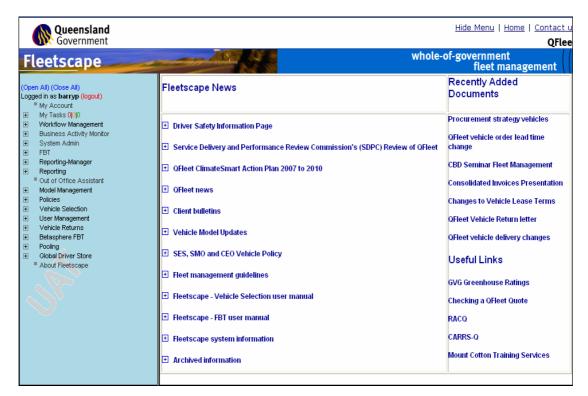


Click on the *Login* button in the *Fleetscape* box.

The following screen will be displayed:



Enter your *Username* and *Password* and click the *Logon* button. The following screen will be displayed:





You can access the latest version of the User Manual from this screen.

The left side of the screen is the task manager bar. Depending on your access level the task manager bar content will differ.

Policy

Overview

Whole-of-Government, Departmental and individual agency policy is embedded into the Fleetscape system to enable informed decision making. This ensures that the vehicles selected meet your service delivery requirements and provides outputs of compliant vehicles to select.

Policy has a 'parent to child' relationship in Fleetscape with whole-of-Government policy flows down to agency policy which in turn flows down the agency structure.

Whole-of-Government policies are automatically embedded in Fleetscape and are inherited by all agencies. Example, for SES policy, agencies will inherit these rules and do not need to create their own SES policy.

Policies are set up in Fleetscape by the Agencies Policy Managers and are converted into business rules which reflect the services delivered by the agency and the agency's organisational structure.

Online Ordering Officers will only see those vehicles available for lease from QFleet that comply with their agency's policy (as defined in the business rules).

Content

This section of the User manual will guide the Policy Manager through:

Creating a New Policy through the following steps:

Step 1 - Service Delivery Descriptions

Step 2 - Vehicle Selection Rules

Step 3 - Option Selection Rules

Step 4 - Vehicle Duty Statements

Step 5 - Matching Vehicles

Search function Edit function Expired policy

Policy rules contain the appropriate compliant vehicle selection rules and option (accessory) selection rules.

Each policy will consist of:

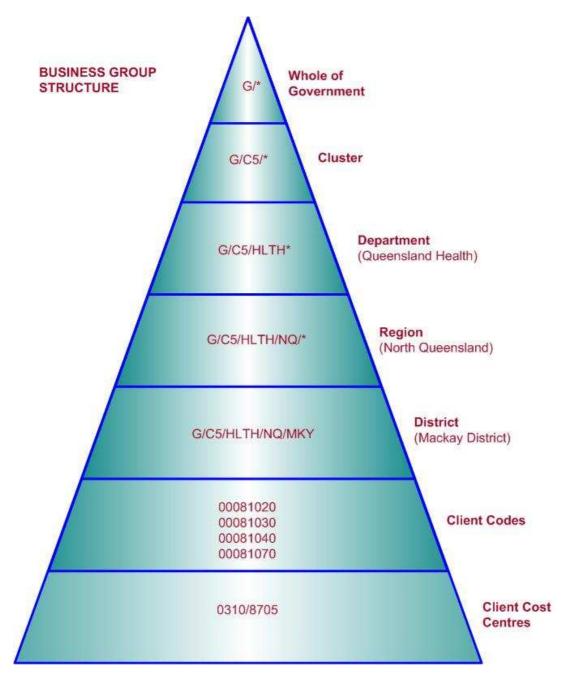
• Service Delivery Description

A name selected by your agency that should reflect the service delivery that vehicles will perform.

• Business Group

The structure of Business Groups is designed to reflect your agency's operational structure. For example, G/C5/HLTH/NQ identifies that NQ is a region in Queensland Health and is part of Portfolio 5 within Queensland Government.

The diagram below illustrates the hierarchy of a Business Group Structure.



Current Business Groups are already listed in the system and you will be able to select a Business Group relevant to your agency from a Drop Down menu.

• Operating Environment

This is the operating environment where the vehicle is going to be used. You will be required to select one or more from the following operating environments:

- Metro city and major business centre metropolitan area.
- Regional country districts outside major centres.
- Remote isolated locations generally requiring off road operating capability.

Duty

Describes the purpose a vehicle will be used e.g. Administration - Pool, Operational – Pool, SES etc.

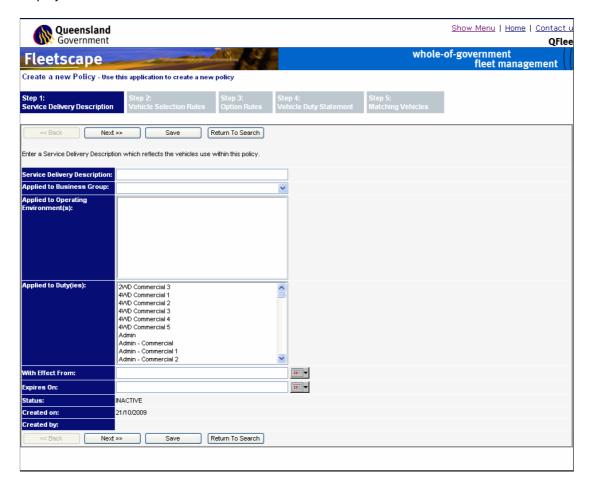
You are now ready to set up policy based vehicle selection rules for your agency. The next section will guide you through creating a new Policy.

Create a New Policy

Content

In this section you will create a new policy.

Click *Policies* on the task manager bar, then click New and the following screen will be displayed:



Step 1 - Service Delivery Description

The first step is to determine a Service Delivery Description.

A Service Delivery Description is a name that you allocate to reflect the service delivery that vehicles will perform in a specific area. For example, you may set up a policy specific to North Region and the Service Delivery Description name could be 'North Region' – or whatever you feel is appropriate for your agency. You can set up as many Service Delivery Descriptions as required. However this should be done with QFleet assistance.



Fleetscape Tab Headings at the top of the screens will also guide you through the policy process. They are ordered from Step 1 to Step 5. The step number and name will be displayed in dark blue to indicate which section you are working on. See screen below.



You are now ready to complete the new policy fields, which consist of:

- Service Delivery Description (free text field to be defined by individual agencies).
- Business Group (QFleet requirement to reflect an agency's hierarchical structure).
- Operating Environment (Metro, Regional or Remote).
- Duty (the duty that the vehicle will perform).
- Policy "Effective from" date.
- Policy "Expires on" date.
- Status (of policy e.g. active/ inactive).

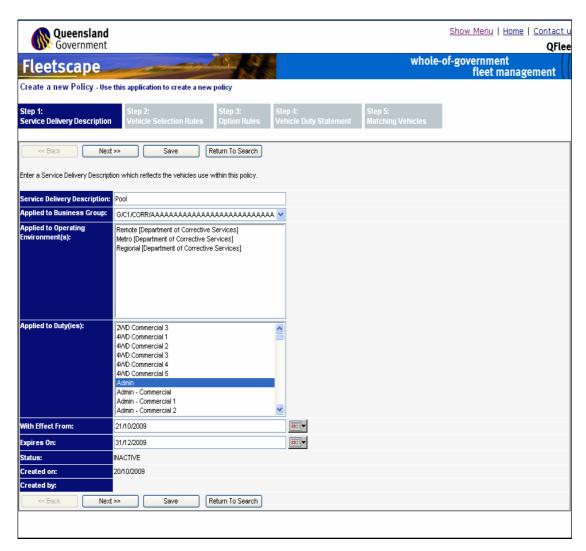
Enter policy description fields by:

- Click in Service Delivery Description field and type in Service Delivery Description name.
- Click on the *Applied to Business Group* drop down menu and select the appropriate Business Group from the list.
- Click on the Applied to Operating Environment(s) drop down menu and select appropriate
 environment from the list (e.g Metro, Regional and/or Remote). You can select one, two
 or all three of the environments.
- Click on the Applied to Duty(ies) drop down menu and select appropriate duty from the list (e.g. Admin – Pool, Ops and/or SES). You can select more than one duty by holding the Control key down.
- The *With Effect From* date is the date the policy is to be effective from and must be set from at least the next working day. Use the drop down menu to select a date from the calendar.
- The Expires On date is the date on which the policy is to be reviewed. Use the drop down menu to select a date from the calendar.
- The status field will appear as *Inactive* until the actual *With Effect From* date arrives then the status will change to *Active*.



The last two fields will automatically populate with the date the policy was *Created On* and who the policy was *Created By*. This creates an audit trail for Policy Managers.

When you have entered all the above fields the screen displays:



Click on Save button and the screen will save or Click on the Next button and screen will automatically save and go to Step 2.

Or click on the Step 2 Vehicle Selection Rules tab which will automatically save and go to Step 2.



If all fields are not completed when you proceed, you will receive a message prompting you to complete the required fields before you can continue. An example of the message prompt is below:



You have now completed Step 1 of creating a new policy and can proceed through the next steps to apply Vehicle Selection Rules and Option Rules to the policy.

Step 2 in the next section will guide you through Vehicle Selection Rules.

Step 2 – Vehicle Selection Rules

Content

In this section you will choose the Vehicle Selection Rules to determine the attributes and vehicle configuration/s required to meet the duty that a vehicle will perform.



Vehicle Selection Rules are set in accordance with whole-of-Government policy, Departmental policy and individual agency policy.

Selections will limit the matching vehicles that will be available in the online ordering module.



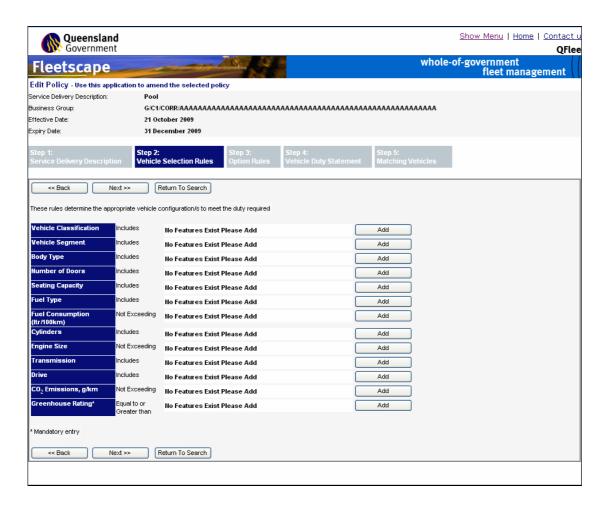
When you set up vehicle selection rules it is important that you also consider:

- Fit for purpose.
- Whole of life costs.
- Fleet mix.
- · Compliance with Government policies.

Vehicle selection rules are supported by a Vehicle Duty Statement (refer to Step 4) and reflect the service delivery requirements, operating environment and vehicle option requirements (refer to Step 3).

Defined selection rules will provide a list of 'matching vehicle/s' that are available for lease from QFleet (refer to Step 5).

The following screen will be displayed for Step 2:



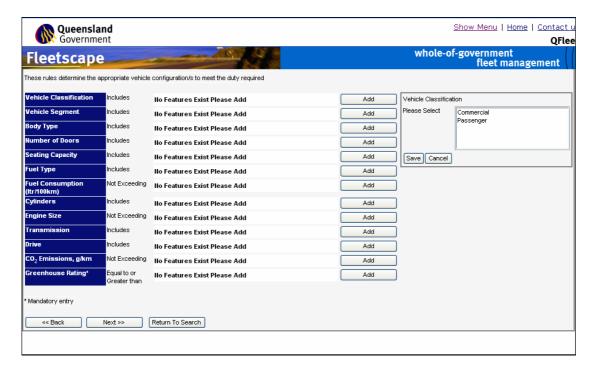
The following steps will guide you through completion of Step 2.

Vehicle Selection Rules

Select vehicle selection rules by clicking on the *Add* button to the right of each field. A pop up menu will display available selections (see below screen).

Note: This pop up menu will remain at the top of the screen even as you move further down adding rules.

Click on the required selection (you can select more than one by holding down the Control button). Click *Save* and your selection/s will appear under each field heading. Repeat this step to add further rules. You don't have to select rules from every category; only select what is appropriate for the relevant policy.



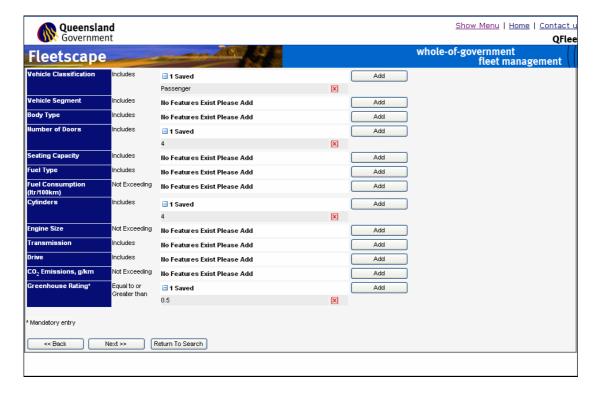
Viewing selections already saved

Click on the \boxdot 2 saved (this denotes the number of selections already made) to view all saved selections in that field.

Deleting Vehicle Selection Rules

You can delete selections by clicking on the \boxtimes box. This will delete the current selection and you can add another one.

An example of what the screen could look like when you have completed entering Vehicle Selection Rules is illustrated below:



Note: Greenhouse Rating is a mandatory inclusion.

When finished click on the Step 3 tab or Next button to proceed to Step 3.

Step 3 in the next section will guide you through Option Selection Rules.

Step 3 – Option Selection Rules

Content

In this section you will be selecting options (accessories) that you want to apply to a policy.

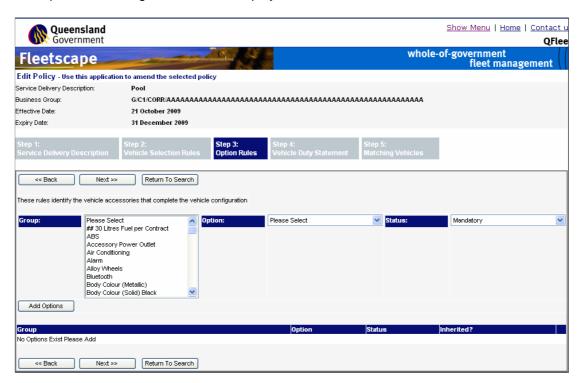




The Option Rules identify the vehicle options that complete a vehicle configuration. Option selection is limited to those options supporting the matching vehicle type/s.

Selection tabs will require you to select *Mandatory* (automatically included in each vehicle quote when online ordering) or *Not Available* (the addition of these accessories will require policy exception authorisation). All other accessories will be available for selection in online ordering.

In Step 3 the following screen will be displayed:



Adding Option Rules

Click on the drop down menu in the *Group* field and select an option from the list. If there are sub-options for an option you will be required to select a specific sub-option in the *Option* field.

For example, if you select *Mud Flaps* at the Group level you may be required to define this further by selecting *Front Mud Flaps* or *Front/Rear Mud Flaps*.

If an option is to be *Mandatory* in your policy, click on the *Status* drop down menu and select *Mandatory*. If you want to make an accessory *Not Available* for selection, click on the *Status* drop down menu and select *Not Available*.

Note: Every other vehicle option will be listed on the Online Ordering Module and will be available for selection.

Click on the Add Options tab.

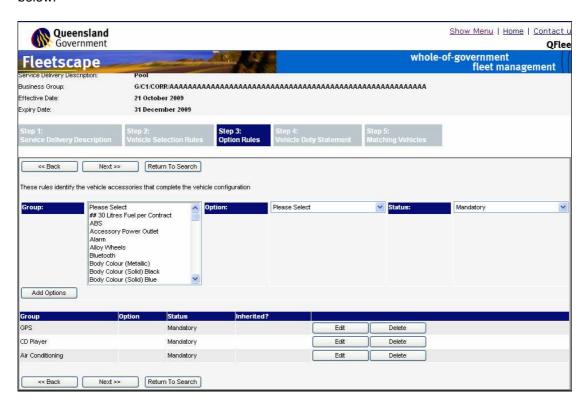
Complete these steps to add further options. All options will appear on the screen in order of selection.



Option Selection Rules that have been nominated as Mandatory or Not Available in the highest business group policy will flow down to all business groups under that top level.

For example, if air conditioning is selected as Mandatory in the highest business group policy, all policies below will show that air conditioning is mandatory, and that it has been inherited from the higher policy.

When options are selected and added they will appear on the screen. An example appears below:



Editing and/or Deleting Option Rules

Click on the *Edit* button beside an option you wish to amend and confirm the change by clicking on the *Edit Option* button.

Click on the *Delete* button beside the option you wish to remove.

When complete click on the *Step 4* tab or the *Next* button. Your selections will automatically save.

Step 4 in the next section will guide you through Vehicle Duty Statement.

Step 4 – Vehicle Duty Statement

Content

In this section you will be able to complete a Vehicle Duty Statement. You can enter data in some or all of the fields: Operating Environment; Terrain; Predominant Adverse Climatic Conditions; Primary Duty; Required Capability; and/or Typical Operating Trip.

Completing a Vehicle Duty Statement is not mandatory; however, it will further define your policy rules for vehicle selection.

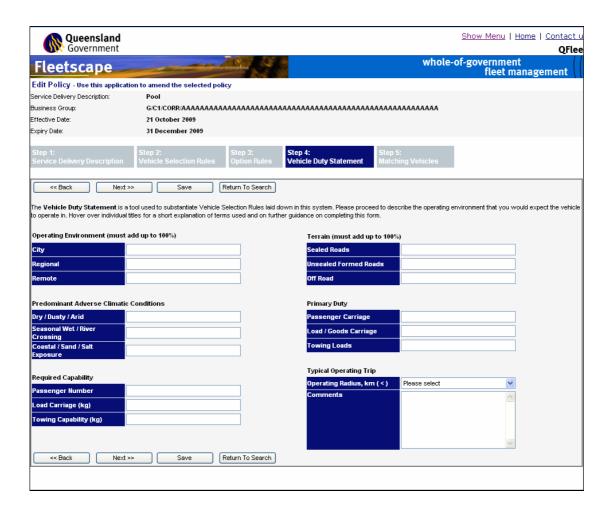




The Vehicle Duty Statement reflects the main service delivery the vehicles will perform. For example, an Administrative Vehicle would likely to be used in a "city" and you would expect it to be driven on "sealed roads" for "100%" of its use.

Completed Vehicle Duty Statements will be available for viewing by staff ordering vehicles through the Vehicle Online Ordering module.

The following screen will display and you can complete the appropriate fields of the Vehicle Duty Statement:



Important: Please read the following information



Hover the curser over the black bolded headings (e.g. *Operating Environment*) to view the following information, which will provide you with definitions.

Operating Environment - Estimate, using percentages, how much time the vehicle is expected to operate in each of the stated environments (e.g. if a vehicle is expected to operate in a city environment for 80% of its time, then enter 80 against City). Must add up to 100%. Definitions of Operating Environment:

- City major business centre metropolitan area.
- Regional country districts outside major centres.
- Remote isolated locations generally requiring off road operating capability.

Terrain – Estimate, using percentages, how much time the vehicle is expected to operate in each of the stated terrains (e.g. if a vehicle is expected to operate on sealed roads for 80% of its time, then enter 80 against sealed roads). Must add up to 100%. Definitions of each Terrain:

- Sealed Roads –For example any bitumen or concrete surface free of loose materials.
- Unsealed Formed Roads Graded and compacted gravel or dirt surfaces.
- Off Road Meaning that there has been no surface preparation for vehicle use.

Predominant Adverse Climatic Conditions – Estimate, using percentages, how much time the vehicle is expected to operate in each of the climatic conditions (e.g. if a vehicle is expected to operate in Dry/Dusty/Arid conditions for 80% of its time, then enter 80 against Dry/Dusty/Arid). This need not add up to 100%. Definitions of each Climatic Condition:

- Dry/Dusty/Arid Climates that may result in particle dust in contact with vehicle body and entering working parts of the vehicle.
- Seasonal Wet / River Crossing Climates that may result in water entering working parts of the vehicle.
- Coastal/Sand/Salt Exposure Climates that may result in substances with eroding effects (such as salt) attacking exterior body and entering working parts of the vehicle.

Primary Duty – Estimate, using percentages, how much time the vehicle is expected to be performing each of the primary duties (e.g. if a vehicle is expected to carry passengers for 80% of its time, then enter 80 against Passenger Carriage. This need not add up to 100%. Definitions of each Primary Duty:

- Passenger Carriage The transport of humans with no excessive cargo.
- Load/ Goods Carriage The transport of goods using the main body of the vehicle (e.g. roof rack or boot space), not the use of exterior bodies such as trailer.
- Towing Loads The transport of goods using an external body of the vehicle (e.g. a trailer).

Required Capability – Provide indications of the required capability of the vehicle. Definitions of each Capability:

- Passenger Number Enter maximum number of passengers the vehicle will be required to carry.
- Load Carriage Enter maximum load carriage in kilograms.
- Towing Capability Enter maximum towing capability in kilograms.

Typical Operating Trip – Provide indications of the distance of a typical operating trip expected of the vehicle. Choose from:

- Less than 100km.
- Less than 250km.
- Less than 500km.
- More than 500km.

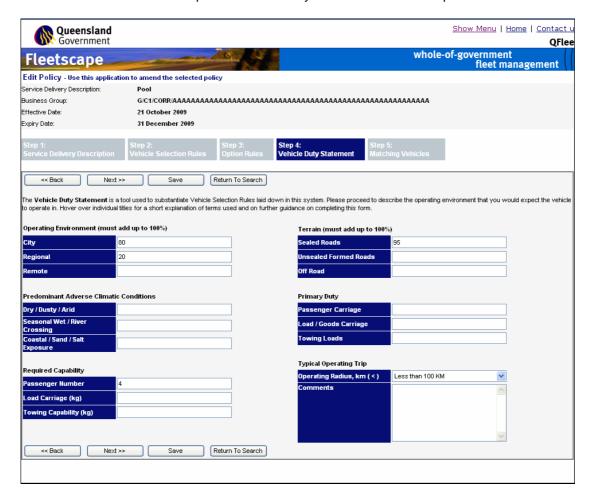
You can now further define your rules by completing the Vehicle Duty Statement. You do not have to make a selection in every section; only define what is relevant to the Service Delivery Description and relevant to your policies.

Click in the appropriate field and type in the relevant information and/or percentages as described above (percentage fields must total 100%).

For example - Operating Environment - City 95 Regional 5.

Repeat until you have completed your required fields.

The screen will show the completed Vehicle Duty Statement. See example below:



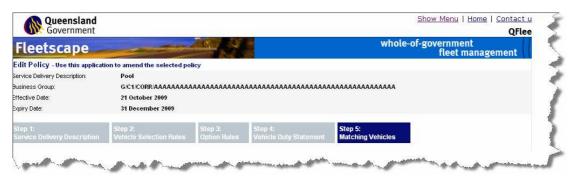
Click on Save, Next or Step 5 Tab to automatically save your entries.

Matching vehicles will be displayed and you can now proceed to Step 5.

Step 5 – Matching Vehicles

Content

This section will enable you to view the matching vehicles.

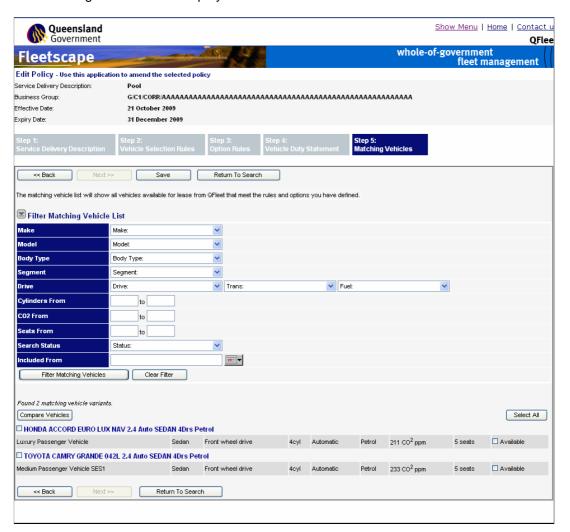




The Matching Vehicle list shows all vehicles that meet the rules and the options (accessories) you have defined in Vehicle Selection Rules and Option Rules.

The Matching Vehicles also reflects the vehicles that are available for lease from QFleet.

The following screen will be displayed:





The Matching Vehicle list allows you to view vehicle specifications and view vehicle comparisons.

- Click on the vehicle description name (in blue) to display the vehicle specifications. You can then click on the tabs to view details like Comfort, Dimensions and Safety etc. Please refer to the screen across:
- To view vehicle comparisons, click on the box at the left of vehicle description you wish to compare.
- Click on the Compare Vehicles button.
- Click on the Close button to return to the matching Vehicles screen.
- Refine the Matching Vehicles list by entering details in Make, Model, Body Type, Segment, Drive, cylinders, CO2, Seats, Status and Included from using drop down menus and selecting from the lists.
- Click on the Filter Matching Vehicles button and only the defined vehicles will be listed.
- Click on the *Clear Filter* button to clear your criteria selections.
- Click on the Select All button to tick all boxes – All vehicles will be available.
- Click on the De-Select All button to untick all boxes – All vehicles will be unavailable. Note: You can also individually tick or untick single vehicles.
- Click on Next or Back button, or
- Click on Return to Search button and click on New to create another policy.





The vehicles will be shown as *Available* and a tick will appear in the box on the right hand side.

If you determine that a vehicle is NOT available for selection by your Vehicle Ordering Officer, you can click on the *Select* button to clear the box.

A blank box means that QFleet will have the vehicle available for lease but your agency's policy has determined that you cannot lease that particular vehicle.

The next section will guide you through the Search function.

Search Existing Policies

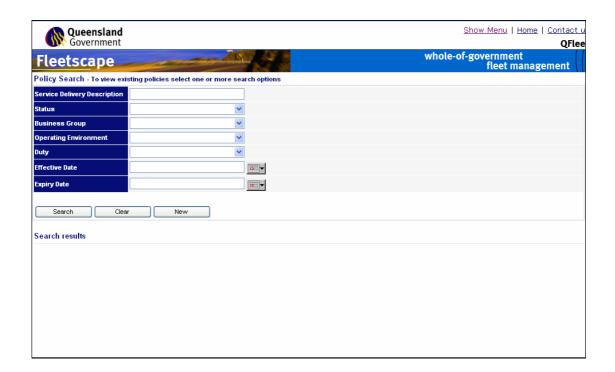
Content

In this section you will be able to search and view existing policies. Return to the initial Fleetscape screen below:



Click on *Policies* and the *Search* on the task manager bar.

The following screen will be displayed:



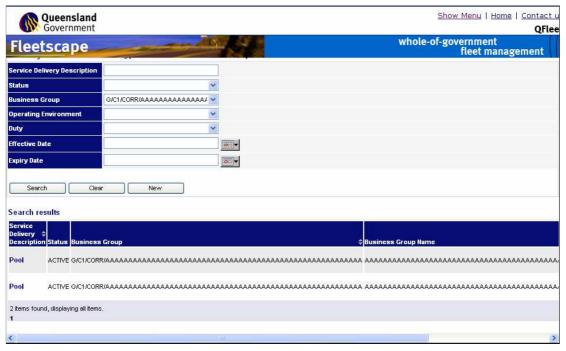
Click on the Search button and all policies relevant to your access level will be displayed.



You can also search for a single policy by entering the search criteria in an individual field or selecting the criteria from the drop down menus.

The *Clear* button can be used to clear all fields so information can be re-entered.

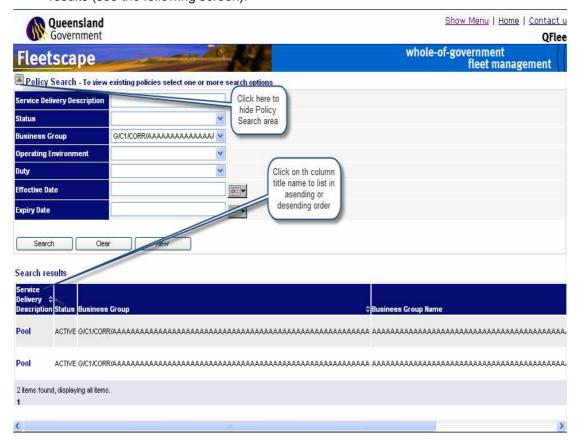
The search results will appear as displayed in the following screen:





You can change the order (ascending or descending) the results will appear by clicking on a column title. See the following screen.

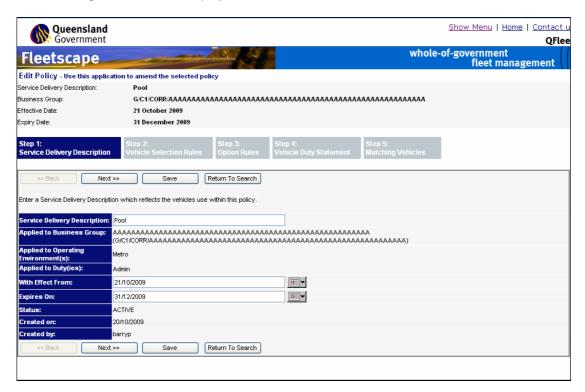
You can hide the policy criteria fields on the screen to display a full screen of search results (see the following screen):





To view details for a policy click on the Service Delivery Description name.

The following screen will be displayed:



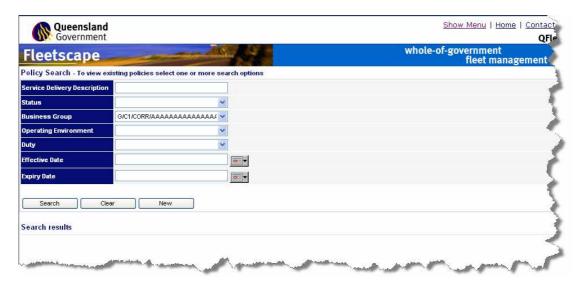
To view full policy details click on each of the 5 Step tabs across the top of the screen.

You have now completed the search policy function. The next section will guide you through the *Edit Policy* function.

Edit Policies

Content

In this section you will be able to edit existing policies. Return to the policy search screen displayed below:



Click on the Search button to display all policies relevant to your access level.



You can also search for a single policy by entering the search criteria in an individual field or selecting the criteria from drop down menus.

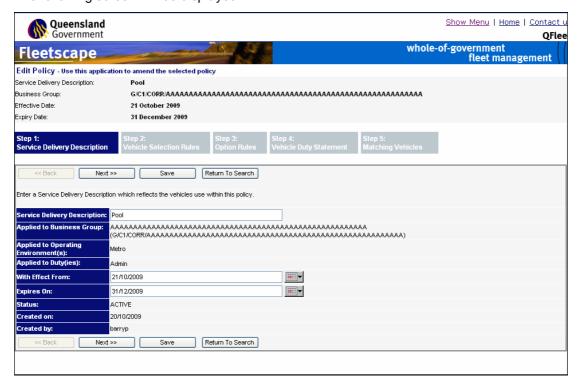
The *Clear* button can be used to clear all fields so information can be re-entered.

The search results will appear as displayed in the following screen:



To edit a policy click on the Service Delivery Description name.

The following screen will be displayed:



You are now in Step 1 of the 5 step tabs across the top of the screen. You can edit details in any or all of these sections.

To edit *Service Delivery Description* selections in *Step 1* click on the relevant field and choose another selection from the drop down box.

Note: Only Service Deliver Description Name, With Effect from and Expires on fields can be edited. To perform any other amendments in Step 1 the policy needs to be expired and a new policy created.

- To edit Vehicle Selection Rules click on Step 2 tab and proceed to edit relevant fields.
- To edit Option Rules click on Step 3 tab and proceed to edit relevant fields.
- To edit Vehicle Duty Statement click on Step 4 tab and proceed to edit relevant fields.
- To edit Matching Vehicles click on Step 5 tab and proceed to edit relevant fields.

You have now completed the edit policy function. The next section will guide you through the Expire Policy function.

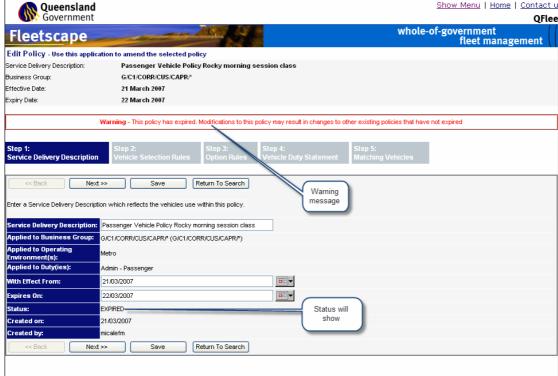
Expired Policy

Content

This section will provide information on expired policies.

Expired policies are to remain as *EXPIRED* and *New Policies* are to be created. This will ensure there is an auditable trail on the creation and amendments to all policies.

Return to Step 1 in Policy selection, see screen displayed below:





Your policy status will change to *EXPIRED* as soon as the *Expires On* date is reached. A warning message will also appear on the screen stating "This policy has expired. Modifications to this policy may result in changes to other existing policies that have not expired".

If you attempt to replace a vehicle or obtain a quote for an additional vehicle where a policy has Expired, Fleetscape will revert upward to a Parent policy in the hierarchy of policies.

For example, if the DIR Corporate Passenger policy (attached to Business Group G/C2/DIR/CORP/*) has expired, quotes for vehicles attached to that policy will revert to the Parent policy which is DIR Fleet Policy (attached to Business Group G/C2/DIR/*).

You have now completed the expired policy section.

Conclusion

You have completed the policy based section discussing:

- Service Delivery Descriptions.
- Operating Environments.
- Vehicle Selection Rules.
- Option Selection Rules.
- · Vehicle Duty Statements.

Your agency policy rules are now embedded in the system.

The policy based vehicle selection rules have set the parameters for the online ordering process supporting replacement and additional vehicle ordering.

Vehicles ordered for lease outside of these parameters will be exceptions and will require authorisation from delegated officers.

The next section of the manual is Online Ordering.

Online ordering

Ordering a replacement vehicle

Fleetscape will take you through a number of steps to create your vehicle order:

Step 1 – Confirm your details

Step 2 - Build your vehicle

Step 3 – Select your vehicle

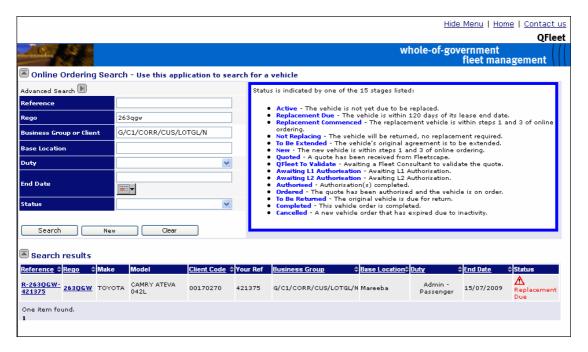
Step 4 - Confirm and accept quote

Click on the plus sign next to *Vehicle Selection* on the left hand menu, then click on *Vehicle Search*.



To begin, select the vehicle being replaced. You can search for a specific vehicle by entering criteria into individual fields (eg *Rego* or *Reference*) and clicking on the *Search* button, or you can look at all vehicles in your fleet by leaving all fields blank and clicking on the *Search* button.

The right hand side of the screen provides an explanation of the different statuses listed, which can assist you in specific search requests by status only (eg Active, Replacement Due).



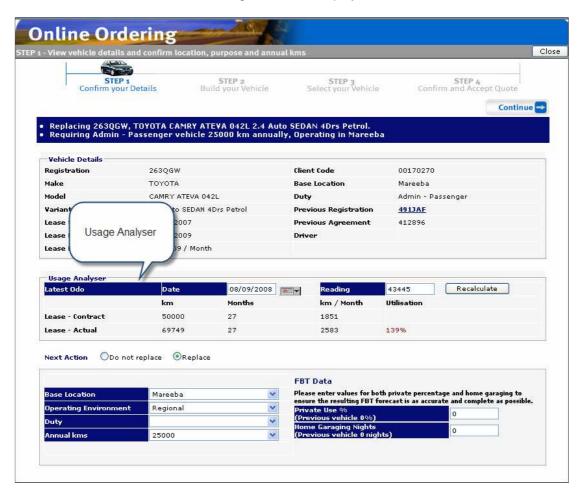


If you search by *Rego*, leaving all other fields blank, a result will only be displayed if the vehicle's status is **Replacement Due**. If you cannot find the vehicle you are looking for, click on arrow next to *Advanced Search*. This will display more fields to allow you to refine your search. Tick the *Show All* box to display vehicles against every status group.



You can change the order of results to appear in either ascending or descending order by clicking on a column title.

When you have brought up your vehicle details, click on the hyperlink under either the *Rego* or *Reference* column, and the following screen will display:





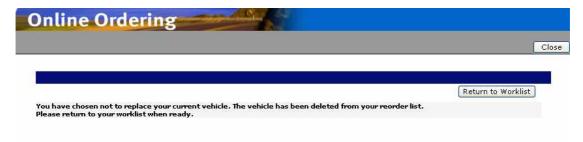
This screen will provide you with a *Usage Analyser* for the vehicle you are replacing. It shows whether the vehicle has been under or over-utilised, and will help you select the lease kilometres for the replacement vehicle.

If the odometer reading is not current, you can update this by clicking on the drop down calendar next to the field *Date*, then entering the correct odometer against *Reading*. Click the *Recalculate* button.

Vehicle not being replaced

If the vehicle is not to be replaced, click on *Do Not Replace* and you will be advised to "click the *Complete* button to indicate that you are no longer required to replace this vehicle."

Clicking the Complete button will change the vehicle status from *Due for Replacement* to *Not Replacing*. You will receive the following message:



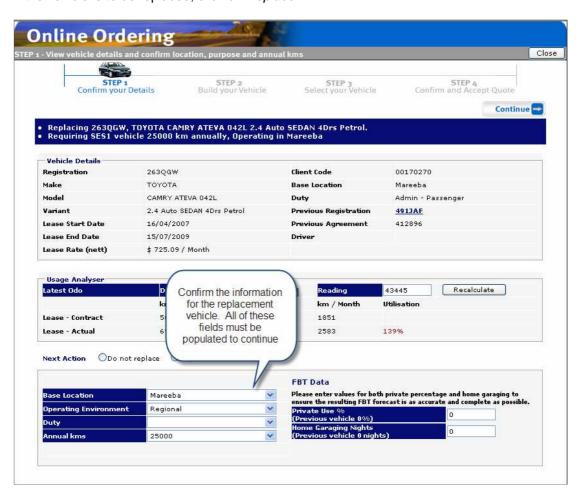
Click either the *Close* button or the *Return to Worklist* button to take you back to the search screen.



If you later determine after changing the status that the vehicle will be replaced, send an email to your QFleet Fleet Consultant, who will re-set the status.

Vehicle to be replaced

If the vehicle is to be replaced, click on Replace.



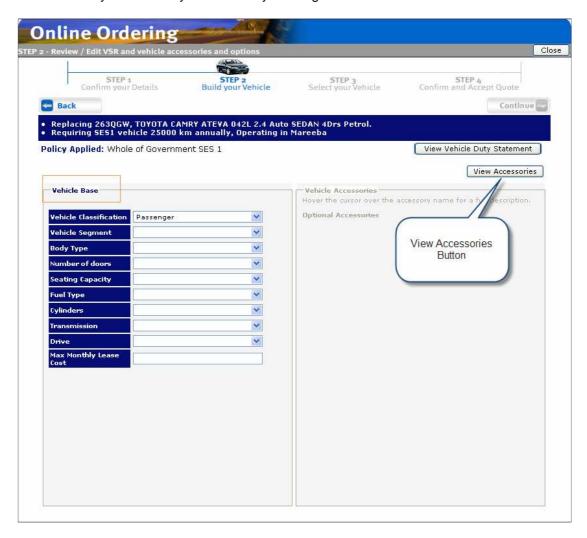
If they are not already completed, enter the *Base Location*, *Operating Environment*, *Duty* and *Annual Kms* fields by selecting from the drop down menus. **Note**: Any pre-populated information in these fields is taken from the vehicle you are replacing. You can change any or all of these defaults by selecting from the drop down menus, or typing in a numeric value. You will not be able to proceed unless you have a value in each of these fields.

FBT data should be completed where applicable to allow the system to factor these into the estimated whole-of-life costs later in the process.

When all fields are completed, click on the *Continue* button, which will take you through to Step 2.



This is where you will build your vehicle by defining the vehicle base and accessories.



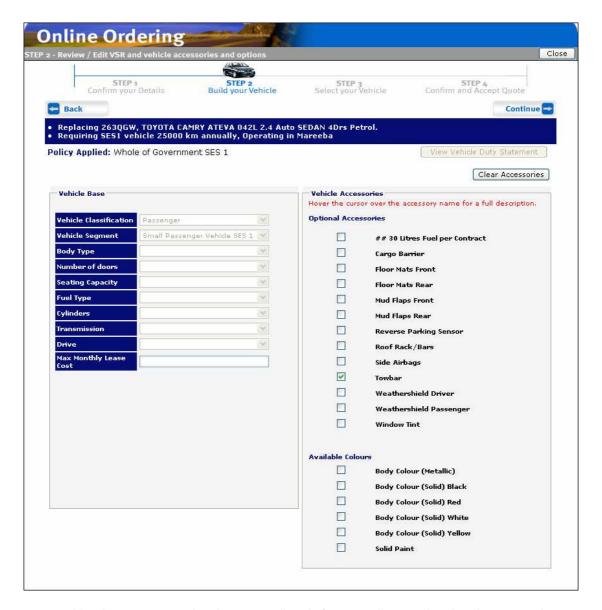
The *Vehicle Base* section is where you determine what type of vehicle to order. The first field, *Vehicle Classification*, **must be completed** before you can proceed. It will only list classifications allowed by your agency's policy (e.g. the policy may dictate that only passenger vehicles can be leased).

Some of these fields will be automatically populated, based on the policies that have been predetermined by your department. You can further define your vehicle by selecting from the drop down lists.



The more fields that are completed will limit the number of vehicles that you will be able to bring up.

Then select any accessories that you require for the vehicle by clicking on the *View Accessories* button. The accessories offered are those available within the range of vehicles that match your definition in the Vehicle Base Selection (e.g. if you select a small 4 cylinder sedan, it is not possible to select a tray).





Mandatory accessories that come directly from a policy are listed at the top, and cannot be de-selected. Any accessories that form part of a minimum safety specification for Queensland Government vehicles will also be listed, and cannot be de-selected.

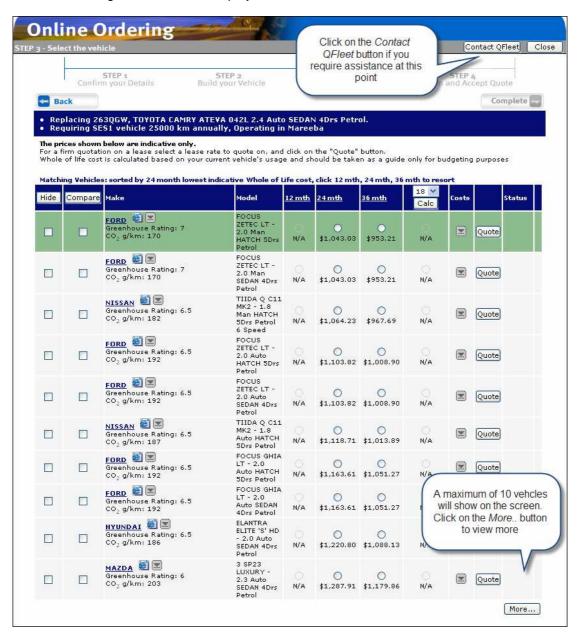
Click on the relevant boxes in the *Optional Accessories* to select accessories. If you need to return to the vehicle base field, press the *Clear Accessories* button, however you will be required to click on the *View Accessories* button again before proceeding (you don't have to actually tick any of the accessories if you don't need any). Click *Continue* to proceed to Step 3.



Your choice of accessories will determine the number of matching vehicles that are available in Step 3 (e.g. if you select engine immobiliser as an accessory, you will only be shown vehicles that are able to have an engine immobiliser fitted to them).



A list of matching vehicles will be displayed:



If you require assistance at this point, click on the *Contact QFleet* button. The following screen will ask you to complete your details which will be sent to your Fleet Consultant, who will contact you by telephone to assist you with your quote:



Complete your contact details and then click on the *Send Details* button to contact your Fleet Consultant. Click the *Return to List* button to return to the list of matching vehicles.

The prices of the vehicles at this stage of the quotation are for whole-of-life costs. The green shading indicates the cheapest whole-of-life cost.

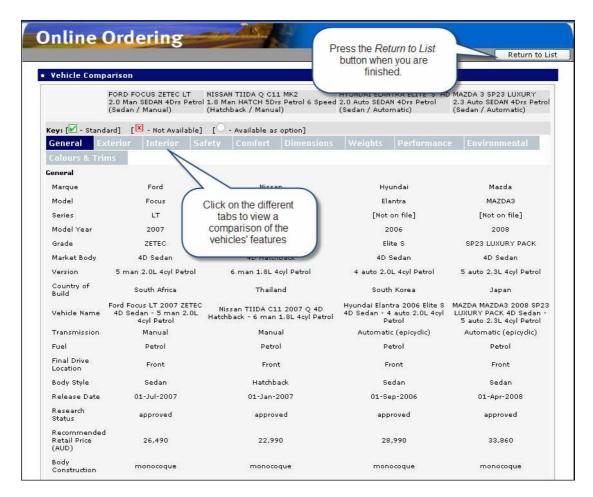
Note: the screen will display a maximum of 10 vehicles. If there are more vehicles available, the remaining list can be viewed by clicking on the *More* button at the bottom of the screen.



You can limit the number of matching vehicles displayed and view only specific vehicles: Under the first column, tick the boxes of the vehicles you wish to view, and click the *Hide* button. This will remove all other vehicles that haven't been ticked from view. If you wish to view them again, click the *Show* button.

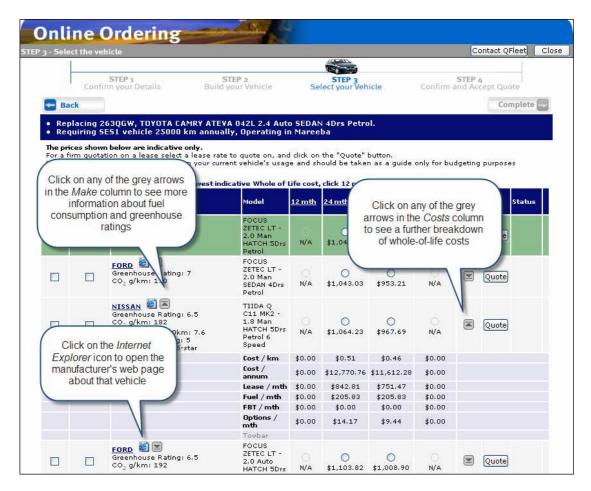


You can also view a 'side by side' comparison of vehicles. Under the second column, tick the boxes against the vehicles you wish to view, and click the *Compare* button. This will open a Vehicle Comparison screen.



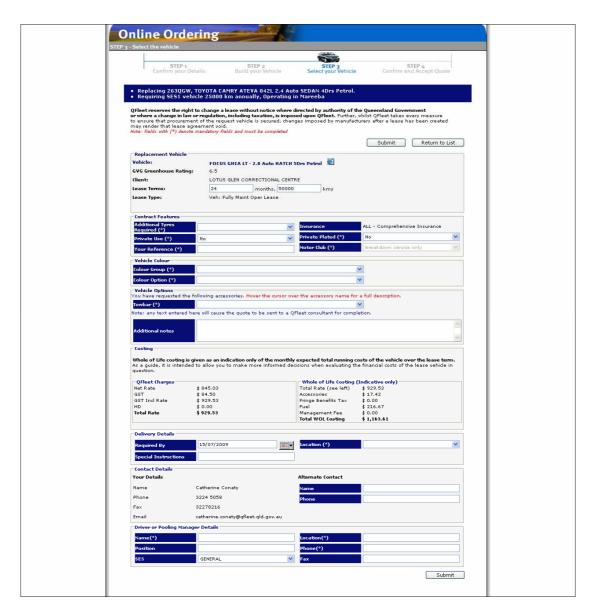
Click on the Return to List button to take you back to the list of vehicles.

The following are some tips to help you navigate around the screen:



Lease costs are displayed in columns of 12, 24 and 36 months, depending on the annual kilometres that you entered in Step 1. If you wish to view the cost for 18 or 30 months, select from the drop down arrow and click on the *Calc* button. **Note**: These are indicative whole-of-life rates. In the next section you will be able to calculate your lease with any lease term (e.g. 22 months).

You can request a quote for any vehicle displayed in the list by clicking on the *Quote* button. You will be presented with the following screen to complete:



The following is a breakdown of the information that needs to be completed in each field:

Replacement Vehicle



Lease Terms - if you require an alternative lease term to what has defaulted, enter the
new details in the Lease Terms field. Your lease terms should be based on your previous
vehicles' utilisation.

Contract Features



- Additional Tyres Required replacement tyres are not included in the lease rate unless
 you specify the number of additional tyres required.
- Private Use is the vehicle for Private Use? Defaults to No.
- Your Reference this is a free text field to add your own reference number.
- Insurance this will default to QFleet's current insurer.
- Private Plated this will default to No.
- *Motor Club* will default to 'Breakdown Service' unless the *Private Plated* field is changed to yes. Vehicles with private plates get full RACQ Membership.

Vehicle Colour



- Colour Group this is where you choose between a metallic or a solid colour.
- Colour Option select from the range of colours available in the colour group.

Vehicle Options



- Accessory choices will need to be defined by clicking on the drop down menu and selecting the accessory from the list.
- Standard Accessories will be identified by the letters (STD) when selecting from the drop down menu.
- Additional Notes any text that you enter in to this field will cause the quote to be sent
 to a QFleet consultant for completion. In this field, you can add any accessories that were
 not listed in step 2. When listing accessories, please number them, e.g. 1) Floor Mats, 2)
 Engine Immobiliser 3) 12 Volt Plug.

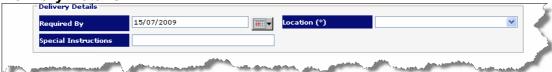
This field can also be used to add messages to the consultant e.g. Replacing Vehicle write-off, please source.

Costing



- QFleet Charges shows a breakdown of the GST charges.
- Whole-of-life costing (indicative only) is an estimate of the whole-of-life monthly cost and includes expenses such as FBT, Fuel etc.

Delivery Details



- Required By this will default to the lease end date of your current vehicle. Vehicles must be ordered 120 days prior to the contract end date of your current vehicle.
- Special Instructions special delivery instructions.
- Location enter the location of the nearest suburb where you would like to collect the
 vehicle.

Contact details



- Your Details the system will load your details here.
- Alternate Contact you can enter details of a second contact here.

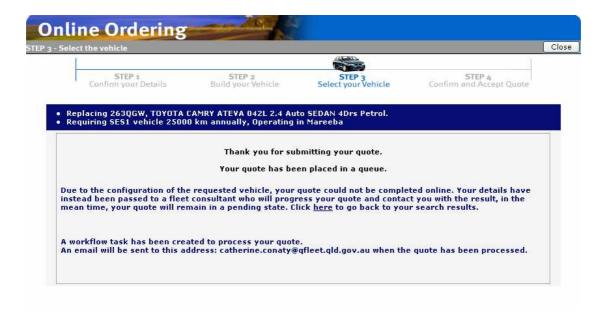
Driver Details



- Name enter the details of the actual driver of the vehicle. If the vehicle is a pool car, enter 'Pool Vehicle' in this field.
- If the vehicle is for an SES officer, choose the relevant level from the drop down selection.

When you have completed all of the fields, click on the Submit button.

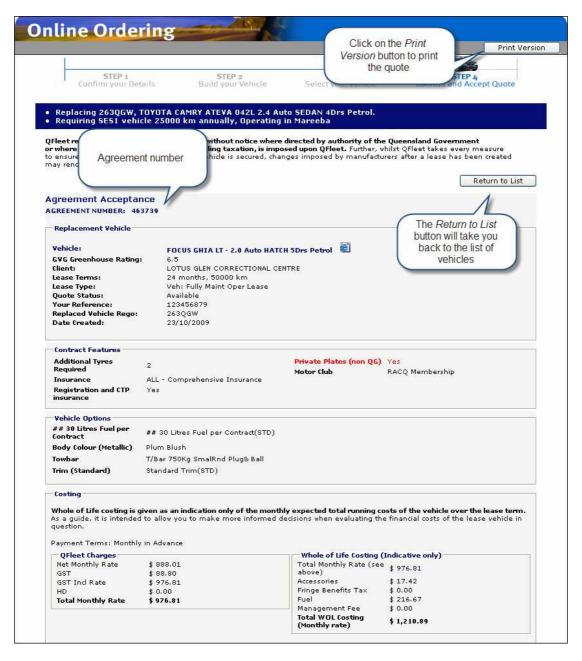
If the quote is unable to be completed for any reason, e.g. accessory pricing is unavailable, you will receive a message (see screen below). The quote will be referred to your QFleet Fleet Consultant who will contact you as soon as possible to assist with completion.



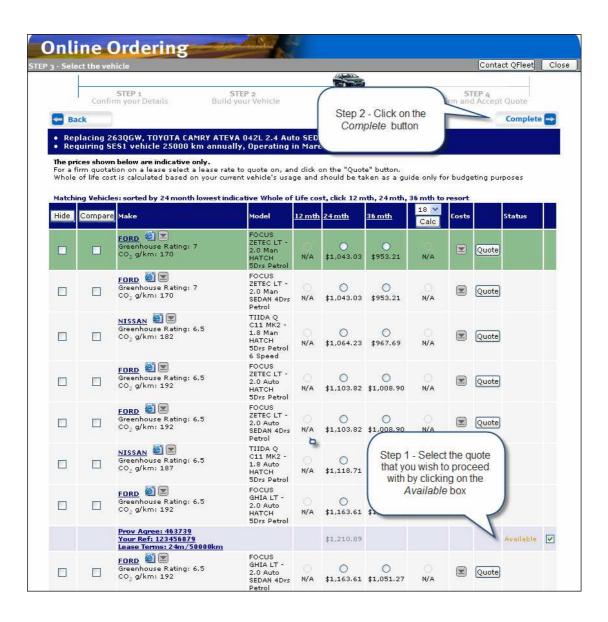
If the quote does not require any assistance by your Fleet Consultant, you will either see the following screen which indicates that the quote is being processed, or you will receive a quote immediately with an agreement number:



If you receive a quote with an agreement number, click on the *Print Version* button to print out a copy of the quote. Click on the *Return to List button* to take you back to the list of vehicles.



To submit your quote, you need to click on the box next to *Available*, and then click on the *Complete* button:

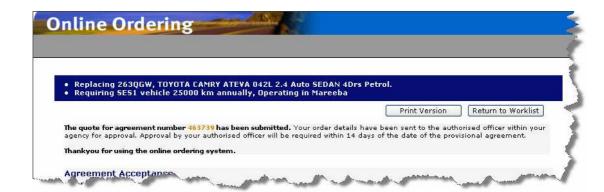




Click on the *Submit for Authorisation* button. This will send the order details to the authorised officer within your agency for approval.



The screen will then show that the quote has been submitted. If you wish to print out a hard copy of the quotation, click on the *Print Version* button and then on the printer icon.



You have now completed your request for your replacement vehicle. The request will be submitted through Fleetscape to an Authorising Officer for approval at Level 1. If required, the request will then be forwarded to a Senior Authorising Officer for approval at Level 2.

You will receive notification by email that:

- Your request has been authorised at Level 1.
- Your request has been authorised at Level 2 (if appropriate).

QFleet will receive your request and you will receive notification by email that your vehicle is on order.

Ordering an additional vehicle

Fleetscape will take you through a number of steps to create your vehicle order:

Step 1 – Confirm your details

Step 2 – Build your vehicle

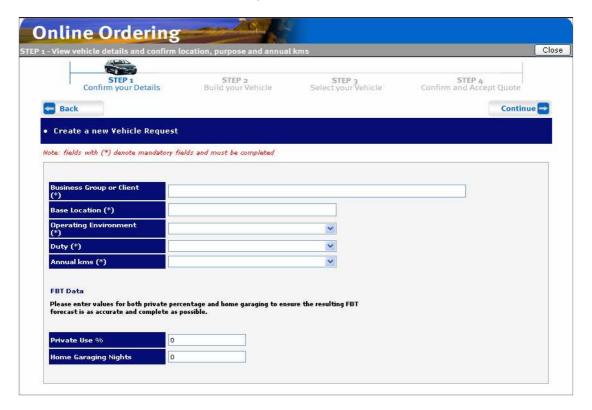
Step 3 – Select your vehicle

Step 4 - Confirm and accept quote

Click on the plus sign next to *Vehicle Selection* on the left hand menu, then click on *Vehicle Search*.



For an additional vehicle, click on the *New* button, and the following screen will appear. Enter information in all fields, using the drop down arrows to make selections. **Note**: *FBT Data* is optional, but should be completed where applicable to allow the system to factor into the estimated whole-of-life costs later in the process:





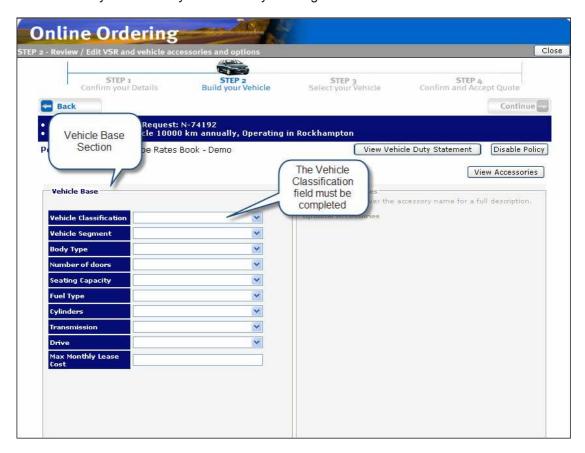
If you are unsure of which client code to use, enter the first four digits of the client code, or do a partial word search and it will bring up a list of possible codes that you can select from (see below):



When all fields are completed, click on the *Continue* button, which will take you through to Step 2.



This is where you will build your vehicle by defining the vehicle base and accessories.



The *Vehicle Base* section is where you determine what type of vehicle to order. The first field, *Vehicle Classification*, **must be completed** before you can proceed. It will only list classifications allowed by your agency's policy (e.g. the policy may dictate that only passenger vehicles can be leased).

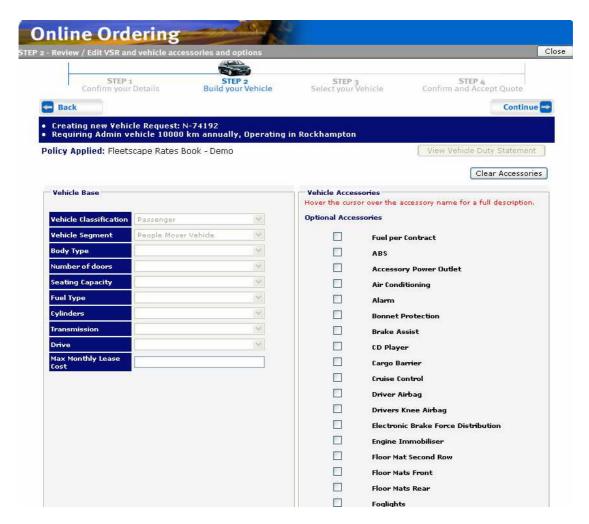
Some of these fields will be automatically populated, based on the policies that have been predetermined by your department. You can further refine your selection by choosing from the drop down lists. **Note:** The more fields that are completed will limit the number of vehicles that you will be able to bring up.

Then select any accessories that you require for the vehicle, by clicking on the *View Accessories* button. The accessories offered are those available within the range of vehicles that match your definition in the Vehicle Base Selection (e.g. if you select a small 4 cylinder sedan, it is not possible to select a tray).



Your choice of accessories will determine the number of matching vehicles that are available in Step 3 (e.g. if you select engine immobiliser as an accessory, you will only be shown vehicles that are able to have an engine immobiliser fitted to them).

Note: Mandatory accessories that come directly from a policy are listed at the top, and cannot be de-selected. Any accessories that form part of a minimum safety specification for Queensland Government vehicles will be also listed, and cannot be de-selected.



Click on the relevant boxes in *Optional Accessories* to select accessories. If you need to return to the *Vehicle Base* field, press the *Clear Accessories* button, however you will be required to click on the *View Accessories* button again before proceeding (you don't have to actually tick any of the accessories if you don't need any). Click *Continue* to proceed to Step 3.



A list of matching vehicles will be displayed.

The prices of the vehicles at this stage of the quotation are for whole-of-life costs. The green shading indicates the cheapest whole-of-life cost.

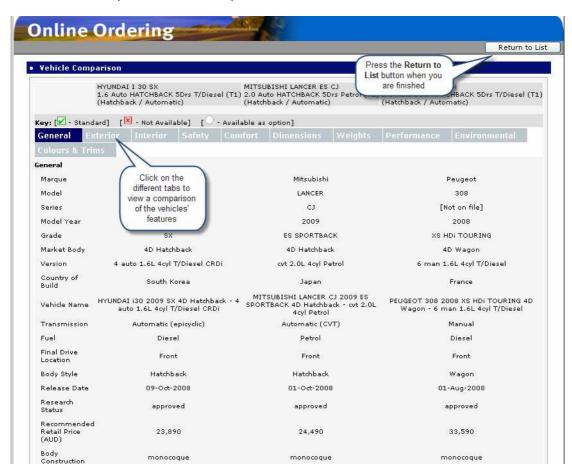
Note: the screen will display the cheapest 10 vehicles. If there are more vehicles available, the remaining list can be viewed by clicking on the *More* button at the bottom of the screen.



You can limit the number of matching vehicles displayed and view only specific vehicles: Under the first column, tick the boxes of the vehicles you wish to view, and click the *Hide* button. This will remove all other vehicles that haven't been ticked from view. If you wish to view them again, click the *Show* button.

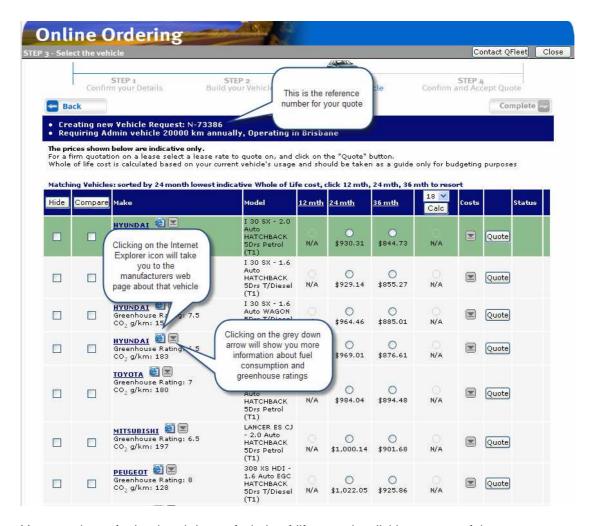


You can also view a 'side by side' comparison of vehicles. Under the second column, tick the boxes against the vehicles you wish to view, and click the *Compare* button. This will open a Vehicle Comparison screen.

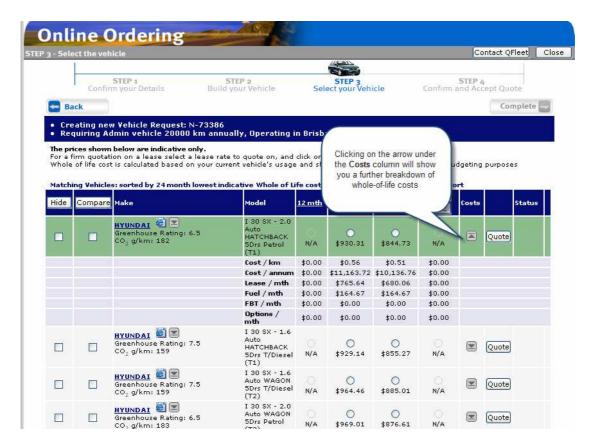


Pressing the Return to List button will take you back to the list of vehicles.

The following tips will help you navigate around the screen:

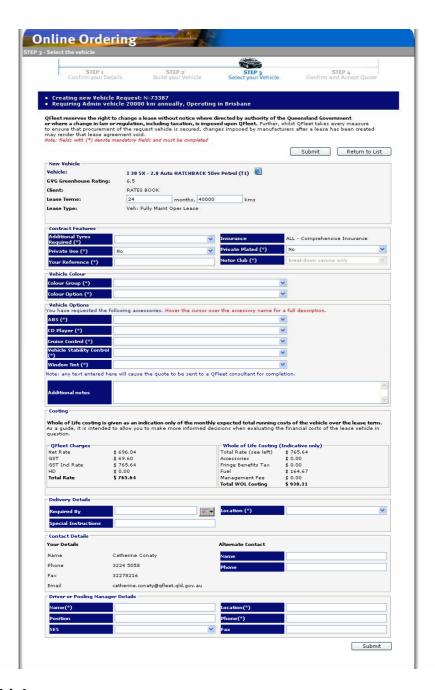


You can view a further breakdown of whole-of-life costs by clicking on one of the grey arrows under the *Costs* column:



Lease costs are displayed in columns of 12, 24 and 36 months, depending on the annual kilometres that you entered in Step 1. If you wish to view the cost for 18 or 30 months, select from the drop down arrow and click on the *Calc* button. **Note**: These are indicative whole-of-life rates. In the next section you will be able to calculate your lease with any lease term (e.g. 22 months).

You can request a quote for any vehicle displayed in the list by clicking on the *Quote* button. You will be presented with the following screen to complete. See below for further detail of each field.

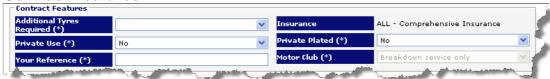


New Vehicle



• Lease Terms - if you require an alternative lease term to what has defaulted, enter the new details in the Lease Terms field.

Contract Features



- Additional Tyres Required replacement tyres are not included in the lease rate unless
 you specify the number of additional tyres required.
- Private Use is the vehicle for Private Use? Defaults to No.
- You Reference this is a free text field to add your own reference number.
- Insurance this will default to QFleet's current insurer.
- Private Plated this will default to No.
- *Motor Club* will default to Breakdown Service unless the *Private Use* field is changed to yes. Vehicles with private plates get full RACQ Membership.

Vehicle Colour



- Colour Group this is where you choose between a metallic or a solid colour.
- Colour Option select from the range of colours available in the colour group.

Vehicle Options



- Accessory choices will need to be defined by clicking on the drop down menu and selecting the accessory from the list.
- Standard Accessories will be identified by the letters (STD) when selecting from the drop down menu.
- Additional Notes any text that you enter in to this field will cause the quote to be sent to
 a QFleet consultant for completion. You can add any accessories that were not listed in
 step 2. When listing accessories, please number them, e.g. 1) Floor Mats, 2) Engine
 Immobiliser 3) 12 Volt Plug.

This field can also be used to add messages to the consultant eg Replacing Vehicle writeoff, please source.

Costing



- QFleet Charges shows a breakdown of the GST charges.
- Whole of Life Costing (indicative only) is an estimate of the whole of life monthly cost and includes expenses such as FBT, Fuel etc.

Delivery Details



- Required By enter the delivery date that you require the vehicle.
- Special Instructions Special Delivery Instructions.
- Location enter the location of the Dealer where you would like to collect the vehicle.

Contact Details



- Your Details the system will load your details here.
- Alternate Contact you can enter details of a second contact here.

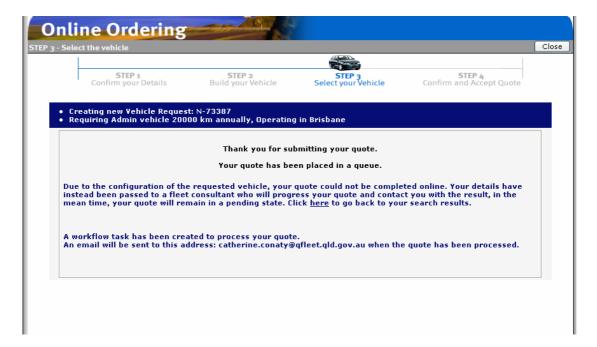
Driver Details



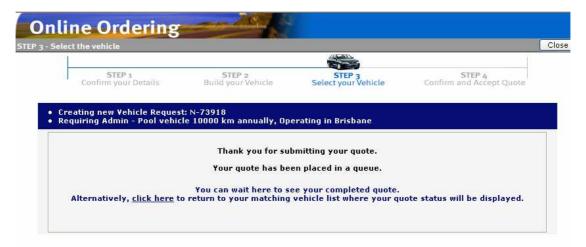
- Name enter the details of the actual driver of the vehicle. If the vehicle is a pool car, enter 'Pool Vehicle' in this field.
- If the vehicle is for an SES officer, choose the relevant level from the drop down selection.

When you have completed all of the fields, click on the Submit button.

If the quote is unable to be completed for any reason, e.g. accessory pricing is unavailable, you will receive a message (see screen below). The quote will be referred to your QFleet Fleet Consultant who will contact you as soon as possible to assist with completion.

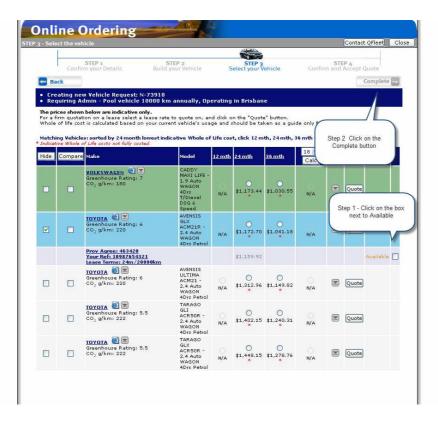


If the quote does not require any assistance by your Fleet Consultant, you will either see the following screen which indicates that the quote is being processed, or you will receive a quote with an agreement number:



If you receive a quote with an agreement number, click on the *Print Version* button to print out a copy of the quote. Click on the *Return to List button* to take you back to the list of vehicles.





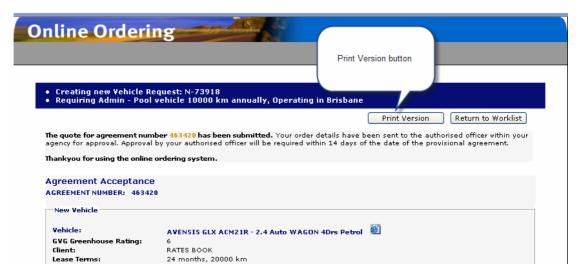
When you have clicked on the Complete button, the system will take you through to Step 4.



Click on the *Submit for Authorisation* button (located at either the top or bottom of the screen) to proceed and complete your request:



The next screen will show that the quote has been submitted. If you wish to print out a hard copy of the quotation, click on the *Print Version* button and then on the printer icon.



You have completed your request for an additional vehicle. The request will be submitted through Fleetscape to an Authorising Officer for approval at Level 1. If required, the request will then be forwarded to a Senior Authorising Officer for approval at Level 2.

You will receive notification by email that:

- Your request has been authorised at Level 1.
- Your request has been authorised at Level 2 (if appropriate).

QFleet will receive your request and you will receive notification by email that your vehicle is on order.

Workflow

Workflow is an automated system which allocates tasks to users.

Fleetscape users receive Workflow tasks as new processes are created by other users. Tasks are automatically added to a user's Worklist. There is also an option to refer tasks to a group or to another workflow user.

Workflow ensures that tasks are not omitted and processes are carried out efficiently and effectively. Timeframes for tasks to be completed can be measured.

Authorising Officers are notified by email when a Workflow task has been allocated. The email notification contains a link to the vehicle request the Agency Vehicle Ordering Officer has submitted for authorisation.

This section will guide users through the following Workflow processes:

- Quote Exception QFleet Fleet Client Services
- Online Ordering Collaboration QFleet Fleet Client Services
- Validate Quote QFleet Fleet Client Services
- Authorisation of Vehicle Requests Client
- Accept Quote QFleet Fleet Client Services
- Order Vehicle QFleet Fleet Purchasing Officers
- Dispatch Vehicle Order QFleet Dispatch Officer
- Vehicle File QFleet Records Management
- Terminate Agreement QFleet
- File RVIR QFleet

Getting Started



If you require access to Fleetscape, please contact QFleet to obtain a Fleetscape Access Request form. Complete the form and return it to QFleet, and a Username and Password will be organised for you. The form can also be accessed on the QFleet Website:

http://cas.qfleet.qld.gov.au/03_clientoaccess/pdf/accessform_fleetscape.pdf

Tips and Hints



The left side of the Fleetscape screen is the task manager bar. Depending on your access level the information you see may be different.

Workflow tasks are numbered and colour coded to identify how many there are and their level of urgency. The task manager bar shows the number of tasks allocated to you.

You can hide the task manager bar to make the screen less cluttered by clicking on the words *Hide Menu* at the top right hand corner of the screen. You can then switch between the two views. You can also make the task pane narrower or larger by moving the double vertical lines on the screen.



Quote Exception – QFleet Fleet Client Services

Quote Exception means the quote created by the Client requires a manual action by QFleet. For example the client may have entered notes or accessories items in the quote field on the quote and the client requires assistance from QFleet to complete the quote.

Quote Exception Workflow tasks are allocated to the appropriate Portfolio team. The task name is *Quote Exception* and the *Reference* field has a number starting with either *N or R* e.g. N7-4246 is for a new or additional vehicle, R711QGV is for a replacement vehicle.



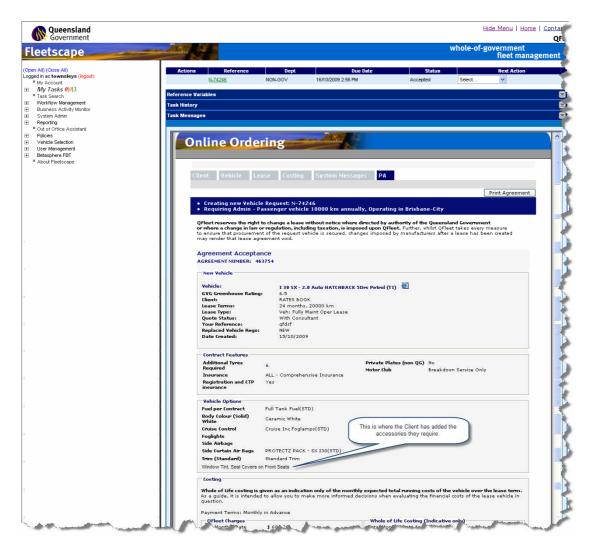
Accept the task by clicking on the down arrow in the Next Action column and select Acquire.

Open the task by clicking on the *Reference* number. Click on each of the tab headings to view the quote and identify where the client requires your assistance.

If the client has added *Notes* or if any accessories require pricing, a message will display in the *System Messages* tab.



Click on the *PA* tab, to confirm the quote is compliant and valid. If any of the above details are incorrect, contact the client and provide assistance.



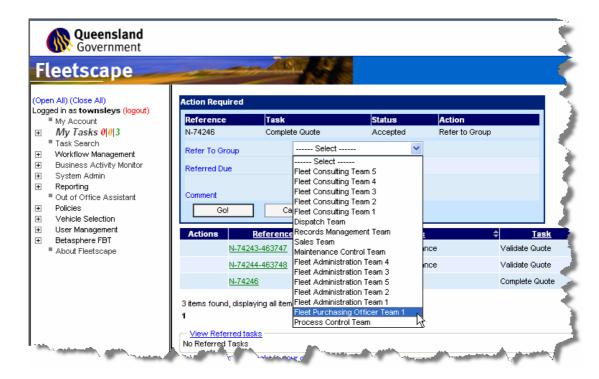
When you have reviewed the action required and undertaken the appropriate steps so the quote can be completed, proceed to the next step.

If the quote exception requires accessory pricing, refer the task to the FPO group.

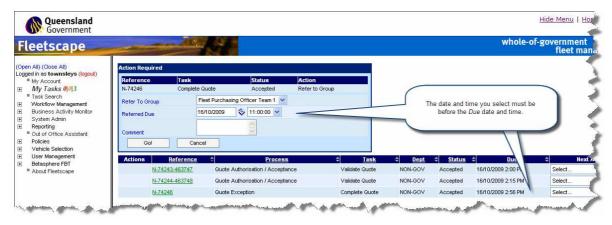
Select the Next Action field, click the down arrow and select Refer to Group:



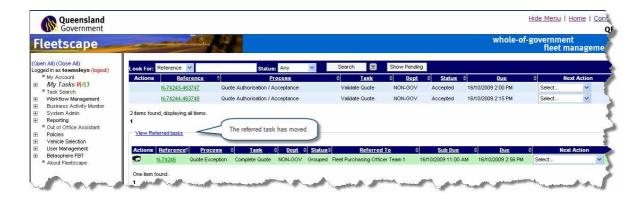
A box will display, select the *Refer to Group* by using the down arrow and choosing the appropriate group e.g. *Fleet Purchasing Officer Team 1*.



Now you have to enter a *Referred Due* date and time. This information will need to be before the *Due* date and time in the Quote Exception row. *Comments* can also be added if required. Click the *Go* button when completed.



The task has now been referred to the Fleet Purchasing Officer Team 1, and moved to the middle section of your Fleetscape screen. By referring the task to the FPO team, the task has remained with you but referred to them to obtain pricing or information.



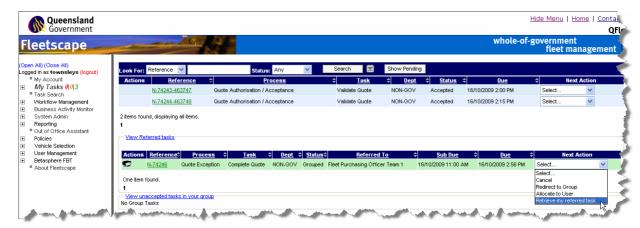


The FPO does not action the task in Fleetscape. You will need to provide the hardcopy agreement to the FPO highlighting the information you require.

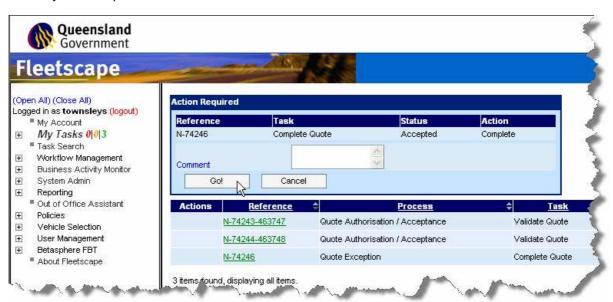
When the hardcopy agreement pricing is received from the FPO team you need to retrieve the task. Click on the drop down arrow in the Next Action field and select *Retrieve my referred task*.

The task will go back to the top of the screen. Now you need to complete the task.

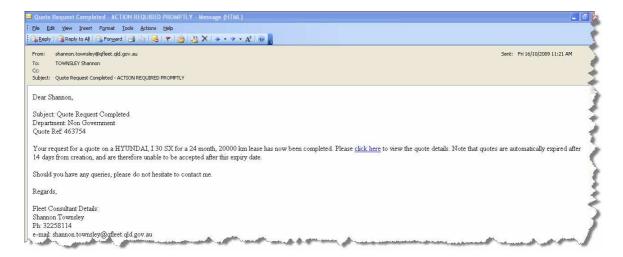
Click on the drop down arrow in the Next Action field and select Complete.



A box will display, enter any *Comments* and then click the *Go* button. **Note**: These notes will not flow on to any other Workflow task, but will be included in the email to the client generated by Fleetscape.

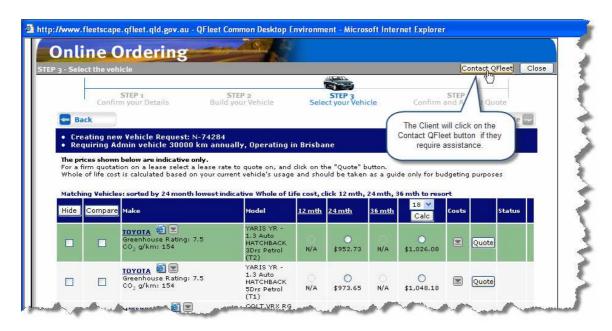


The workflow task has been sent back to the client. They will receive an email from Fleetscape informing their quote request is now available to complete.



Online Ordering Collaboration – QFleet Fleet Client Services

The Ordering Officer (Client) is able to click on the *Contact QFleet* button at Step 3 in the Online Ordering process for assistance:



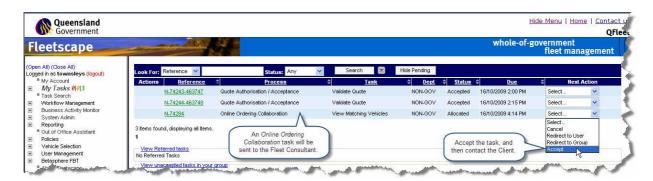
The Client will confirm their contact details, and then click on the Send Details button:



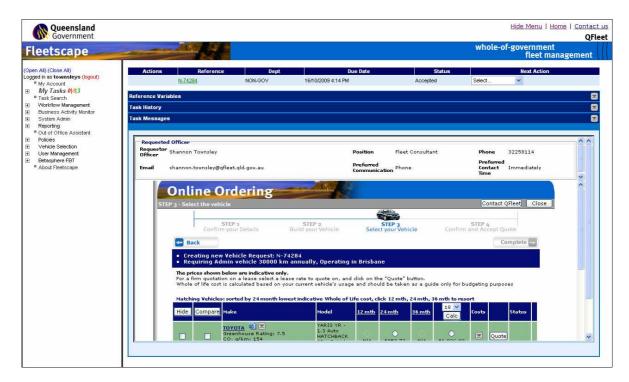
The Client will receive the following message:



The Fleet Consultant will receive an Online Ordering Collaboration task and accept the task:

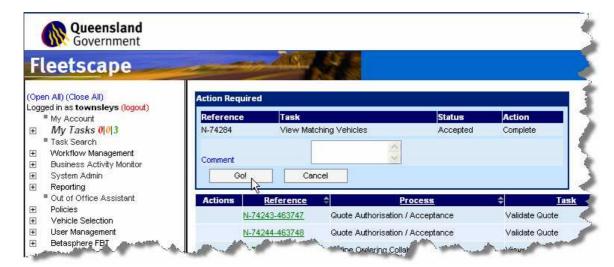


To view the Client's issue, click on the *Reference* number. You can identify where the Client is requiring assistance and guide them through completing their quote.



You are required to complete the task to remove it from your task list. Click on the down arrow in the *Next Action* field and select *Complete*.

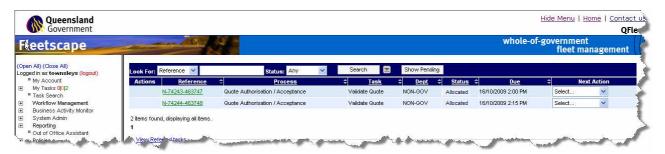
The following screen will display. Click on the *Go* button to remove the task from your Workflow list:



Validate Quote – QFleet Fleet Client Services

All quotes are validated by QFleet to ensure that the vehicle is compliant and the quote is correct before being submitted to L1 and or L2 for authorisation. If there are any queries, the Fleet Consultant or Fleet Administrator contacts the Client Ordering Officer.

Fleet Client Service Branch staff review Workflow tasks that have been allocated to them. The task will display as *Validate Quote*.

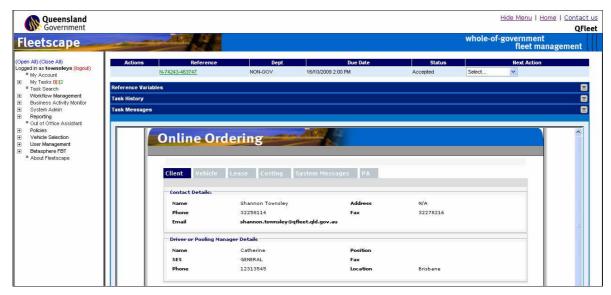


Validate Quote Workflow tasks are allocated to the appropriate Portfolio team. Click on the drop down arrow on the *Next Action* field and select *Acquire*. The *Status* will change to *Accepted*.

Click on the Reference Number to open the quote details.



The following screen displays:



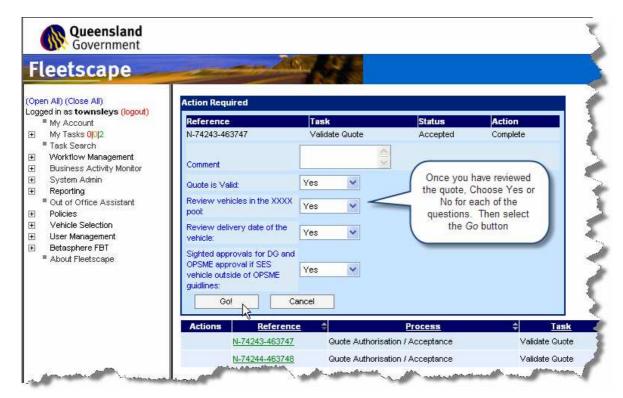
Check all details on the screen by clicking on each of the tab headings.

You are now required to complete the task to remove if from your task list. Click on the *Next Action* column and select *Complete*:



The following box will display. If the quote is valid and compliant, select Yes for each of the questions asked. Click on the Go button and the task will move from your Workflow list to the Level 1 Authorisation Officer. The quote will not proceed unless all answers are Yes.

Make any notes if required e.g. to advise the FPO team that the vehicle is required ASAP and must be sourced for delivery.



Authorisation of Vehicle Requests – Client

Government Agencies can have Level One (L1) Authorising Officers and Level Two (L2) Authorising Officers. L2 Authorising Officers are not mandatory for all agencies.

The information contained in these instructions applies to both levels of Authorising Officers.

There are two ways to complete Authorisations:

- Option One Receive a Fleetscape Authorisation email (Automated).
- Option Two Log in to Fleetscape (Manual).

Option One

1. Receiving the Fleetscape authorisation email

Authorising Officers receive an email generated from Fleetscape Workflow advising a request for a vehicle replacement or new vehicle requires authorisation. The email contains a link to the task. Click on this link to be directed to Fleetscape:



2. Logon to Fleetscape

The Fleetscape login screen displays. Enter your Fleetscape *Username* and *Password*, click on *Logon* to open Fleetscape:



3. Confirm vehicle details

The Online Ordering screen displays. This screen provides all the information to view the vehicle to be ordered.

Check the *Decision Required By* field, and ensure you action the authorisation before the quote expires.

Click on each tab heading to view more information about the vehicle order.

Vehicle Details tab is a summary page and provides details on:

- Lease parameters
- Financial implications and delegations
- Vehicle selection compliance with policy

The Policy Details tab provides details of the Policy selected by the Ordering Officer.

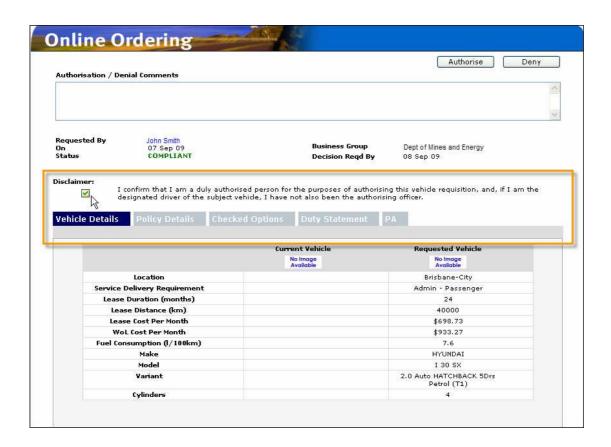
The *Checked Options* tab will display the standard options and accessories selected by the Ordering Officer.

The *Duty Statement* tab will be populated by the Ordering Officer when justification for a non-compliant vehicle is required.

The PA tab outlines the provisional Agreement Acceptance:

- Vehicle details including GVG rating
- Ordering Officer details
- Detailed Financial components

Once you have checked the vehicle details and agree to the vehicle quote, place a tick in the *Disclaimer* box.



4. Authorise or Deny the vehicle order

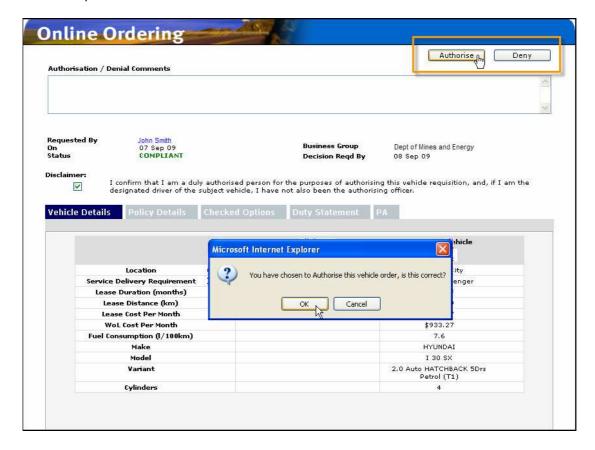
You now need to *Authorise* or *Deny* the vehicle:

Click on either of the buttons at the top of the vehicle screen.

Notes explaining you reason to deny or authorise the quote can be added into the *Authorisation/Denial Comments* box.

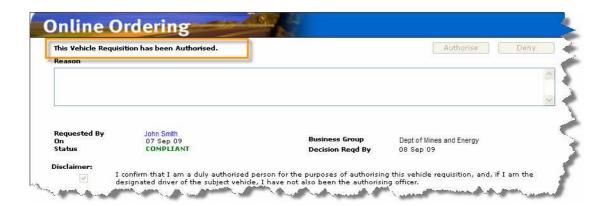
When the *Authorise* button is selected a warning box displays to confirm your selection. The same will apply if you *Deny* the vehicle.

If you *Deny* the quote you are required to enter note explaining your reason. An email will be sent to the Ordering Officer advising the quote was denied, the vehicle will need to be requoted.



5. Authorisation confirmed

Fleetscape will display a confirmation message if the vehicle quote has been authorised correctly. The authorisation process is now complete and the task will be removed from your task list.



6. Where does the task go?

Fleetscape Workflow will automatically forward an email with a link to the next Authorising Officer if required.

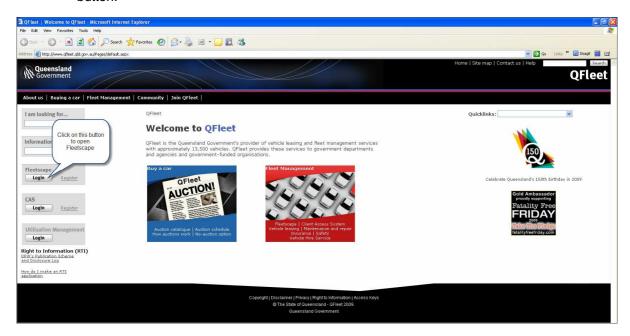
Once the order request has been authorised, workflow will allocate the task to a QFleet Fleet Consultant team to accept the vehicle order, which will then be placed with the vehicle manufacturer based on your specification.

Option Two

1. Log on to Fleetscape

Authorising Officers can log on to Fleetscape and access the tasks allocated to them by Workflow.

Open the QFleet Website <u>www.qfleet.qld.gov.au</u> and click on the Fleetscape Login button.



The Fleetscape application opens. Enter your Fleetscape Login and Password.

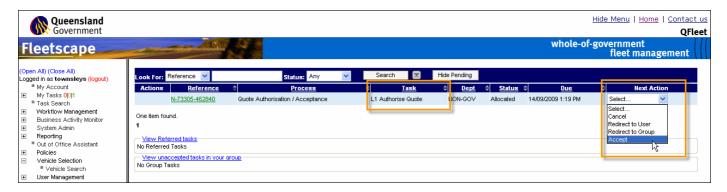


2. Check your tasks

Your workflow tasks will display. The *Task* column will provide an explanation why the task was directed to you.

The task needs to be accepted before authorisation can occur:

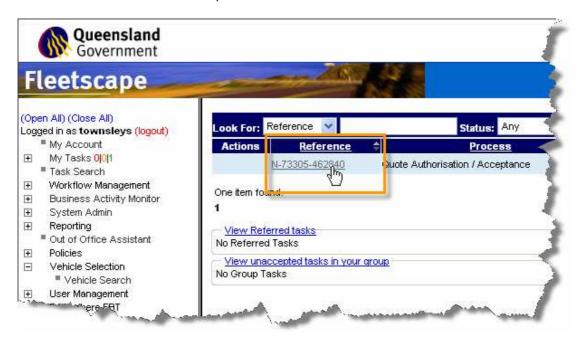
Click on the Next Action column and select Accept.



3. Open the vehicle order

Open the vehicle quote to provide authorisation:

• Click on the quote number in the Reference column.



4. Confirm vehicle details

The *Online Ordering* screen displays. This screen provides all the information to view the vehicle to be ordered.

Check the *Decision Required By* field, and ensure you action the authorisation before the quote expires.

Click on each tab heading to view more information about the vehicle order.

Vehicle Details tab is a summary page and provides details on:

- Lease parameters
- Financial implications and delegations
- Vehicle selection compliance with policy

The Policy Details tab provides details of the Policy selected by the Ordering Officer.

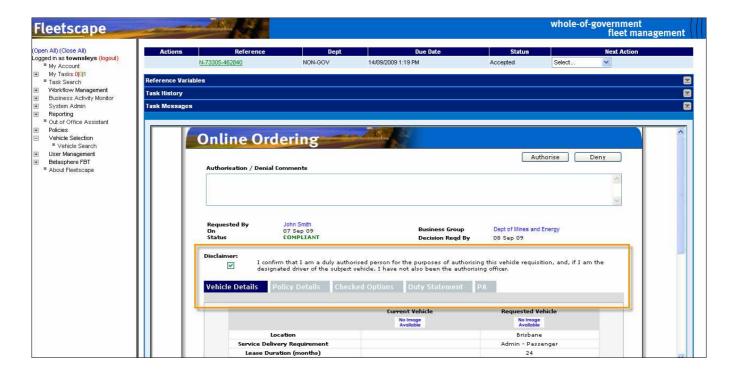
The *Checked Options* tab will display the standard options and accessories selected by the Ordering Officer.

The *Duty Statement* tab will be populated by the Ordering Officer when justification for a non-compliant vehicle is required.

The PA tab outlines the provisional Agreement Acceptance:

- Vehicle details including GVG rating
- Ordering Officer details
- Detailed Financial components

Once you have checked the vehicle details and agree to the vehicle quote, place a tick in the *Disclaimer* box.



5. Authorise or Deny the vehicle order

You now need to Authorise or Deny the vehicle:

• Click on either of the buttons at the top of the vehicle screen.

Notes explaining you reason to deny or authorise the quote can be added into the *Authorisation/Denial Comments* box.

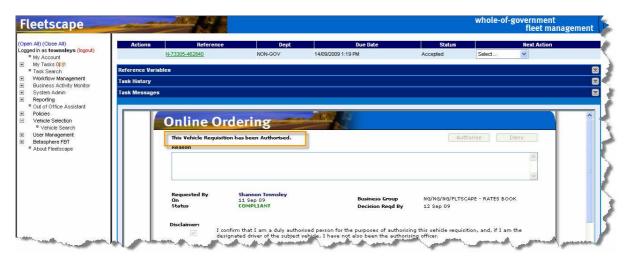
When the *Authorise* button is selected a warning box displays to confirm your selection. The same will apply if you *Deny* the vehicle.

If you *Deny* the quote you are required to enter note explaining your reason. An email will be sent to the Ordering Officer advising the quote was denied, the vehicle will need to be requoted.



6. Authorisation confirmed

Fleetscape will display a confirmation message if the vehicle quote has been authorised correctly.



7. Complete the Workflow task

The task needs to be completed in Workflow to allow the automated emails to continue to the next user:

• Click on the Next Action column and select Complete.



- A warning box will display and *Comments* can be entered if required. If you type a comment in the *Comment* field it will stay in workflow only.
- Click the Go button:



8. Where does the task go?

The task is no longer available in your Workflow task list:



Fleetscape Workflow will automatically forward an email with a link to the next Authorising Officer if required. Workflow will also forward an email to the Vehicle Ordering Officer notifying them the request has been approved.

Once the order request has been authorised, workflow will allocate the task to a QFleet Fleet Consultant team to accept the vehicle order, which will then be placed with the vehicle manufacturer based on your specification.

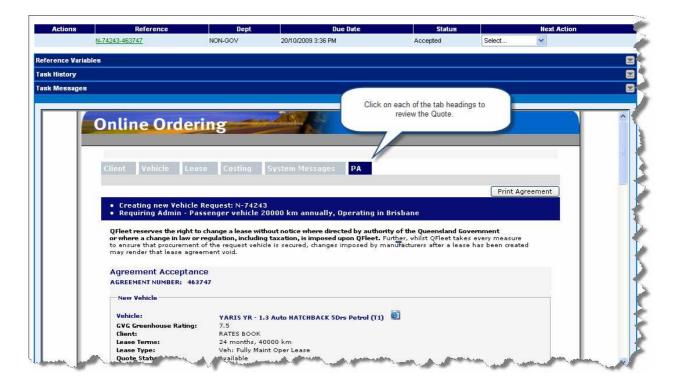
Accept Quote – QFleet Fleet Client Services

QFleet Fleet Client Services team members will review Workflow tasks that have been allocated to them. The task will display as *Accept Quote*.

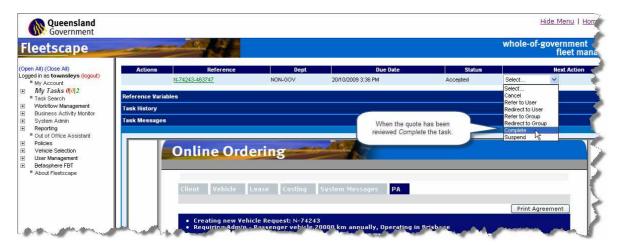
Click on the drop down arrow on the *Next Action* field and select *Accept*. The *Status* will change to *Accepted*. Click on the *Reference Number* to open the quote details.



The vehicle quote details screen opens. Click on each of the tab headings to review the quote.



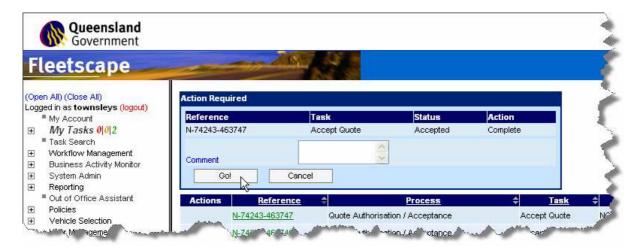
You are now required to complete the task to remove it from your task list:



The following screen displays. Click on the *Go* button to remove the task from your Workflow list.



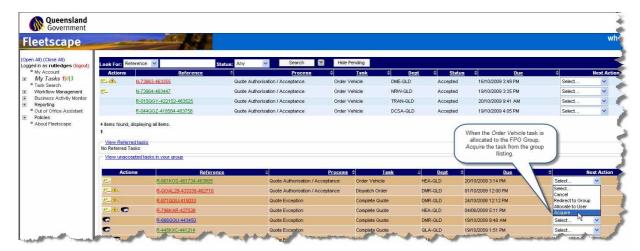
The vehicle quote needs to be accepted in Kerridge.



Order Vehicle - QFleet Fleet Purchasing Officers

QFleet Fleet Purchasing Officers will review Workflow tasks that have been allocated to them. The task will display as *Order Vehicle*.

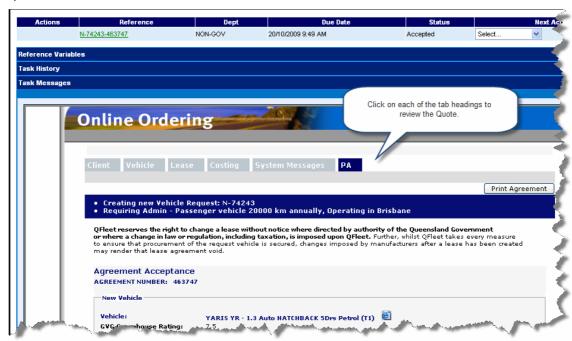
The Fleet Purchasing Officers (FPO) are set up as a group. All *Order Vehicle* tasks are sent to the FPO Group. Each FPO will acquire *Order Vehicle* tasks from the group tasks as required. Accept the task by clicking on the down arrow in the *Next Action* column and select *Acquire*:



The *Task* will be *Order Vehicle* and the *Status* will be *Accepted*. Click on the *Reference Number* to open the vehicle to be ordered details.



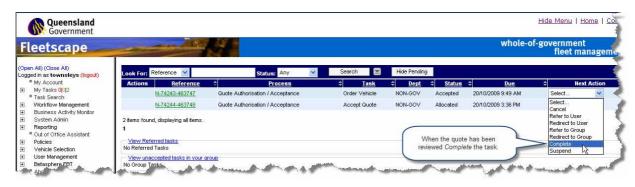
The vehicle quote details screen opens. Click on each of the tab headings to review the quote:



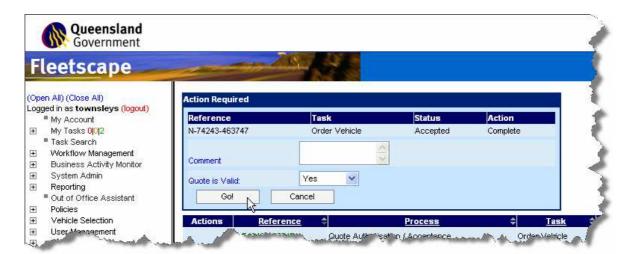
You are now required to Complete the task to remove it from your task list.



The vehicle order needs to be created in Kerridge.



The following screen displays. Click on the *Go* button to remove the task from your Workflow list:



Dispatch Vehicle Order – QFleet Dispatch Officer

The QFleet Dispatch Officer will review Workflow tasks that have been allocated to them. The task will display as *Dispatch Order*.

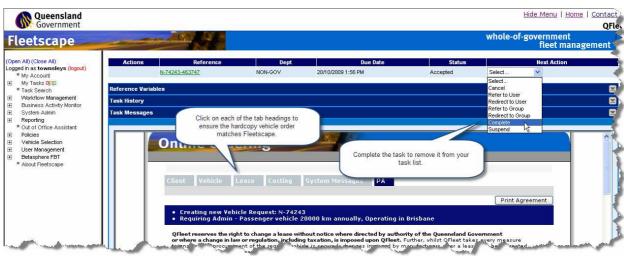
The FPO will also supply the hardcopy vehicle order to prior to accepting the Workflow task. To accept the task click on the drop down arrow on the *Next Action* field and select *Accept*. The *Status* will change to *Accepted*. Click on the *Reference Number* to open the vehicle to be ordered details.



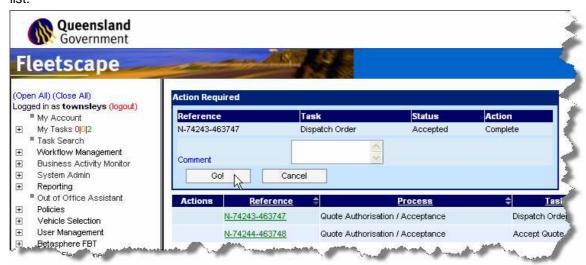
Confirm the hard copy vehicle order matches the Workflow task and then Complete the task.



The dispatch date also needs to be updated in Kerridge.



The following screen displays. Click on the *Go* button to remove the task from your Workflow list:



Vehicle File – QFleet Records Management

The Records Officer reviews Workflow tasks that have been allocated to them. The task will display as *Create Vehicle File*.

The Records Officer receives a copy of the vehicle order to prior to accepting the Workflow task. To accept the task click on the drop down arrow on the *Next Action* field and select *Accept*. The *Status* will change to *Accepted*. Click on the *Reference Number* to open the vehicle to be ordered details.

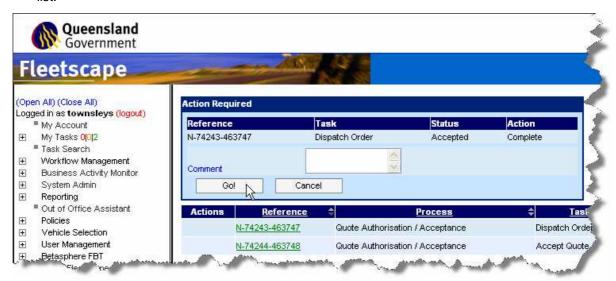
If required click on the Reference Number to open the vehicle order details.



Complete the workflow task by clicking on the drop down arrow on the *Next Action* field and select *Complete*:



The following screen displays. Click on the *Go* button to remove the task from your Workflow list:



Terminate Agreement – QFleet

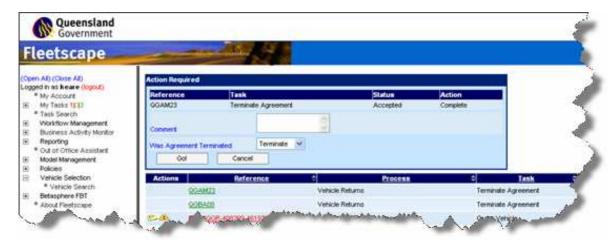
The Fleet Consultant will review Workflow tasks that have been allocated to them. The task will display as *Terminate Agreement*. This task has been generated by the Return Agent receiving a vehicle return.

Click on the drop down arrow on the *Next Action* field and select *Accept*. The *Status* will change to *Accepted*. Click on the *Reference Number* to view the *Inspection Returned Details*.

Complete the workflow task by clicking on the drop down arrow on the *Next Action* field and select *Complete*.



The following screen displays. Click on the *Go* button to remove the task from your Workflow list:





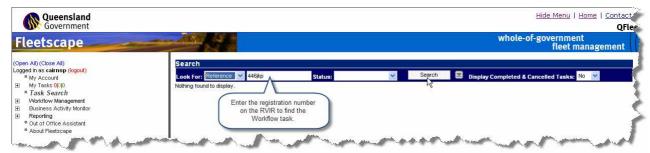
The vehicle also needs to be terminated in Kerridge.

File RVIR - QFleet

The Records Officer reviews Workflow tasks that have been allocated to them. The task will display as *File RVIR*.

The Records Officer does not action anything in Workflow until a hardcopy Returned Vehicle Inspection Report (RVIR) is supplied to them.

When the RVIR is received perform a search in Fleetscape to find the workflow task. Click on the *Task Search* menu item, change the *Look For* search enquiry to Reference and enter the registration number on the RVIR.



The task will display. Click on the drop down arrow on the *Next Action* field and select *Acquire*:

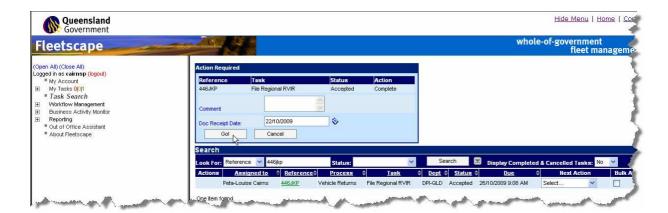


The task has now been assigned to you. If you need to verify the hardcopy RVIR with the Workflow task click on the *Reference Number* to open the *Inspection Report Details*.

Complete the workflow task by clicking on the drop down arrow on the *Next Action* field and select *Complete*:



The following screen displays. If required amend the *Doc Receipt Date*. Click on the *Go* button to remove the task from your Workflow list.





The RVIR needs to be scanned and filed on the vehicle file.