

Vehicle Coordinator Training Manual

Ministry of Central Services
Commerical Services
Central Vehicle Agency

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— of —
Saskatchewan

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INTRODUCTION

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

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

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

RESPONSIBILITIES OF POOL COORDINATORS

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

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

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

LOGGING INTO FLEETWAVE

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

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

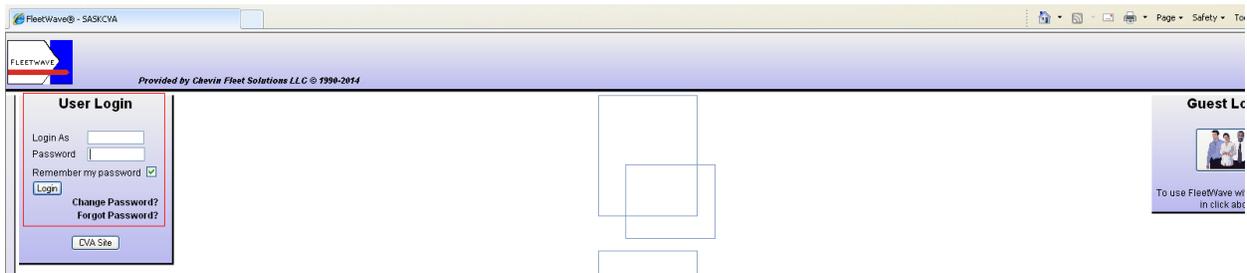


Figure 1 – Login screen

NAVIGATING FLEETWAVE

Home page

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

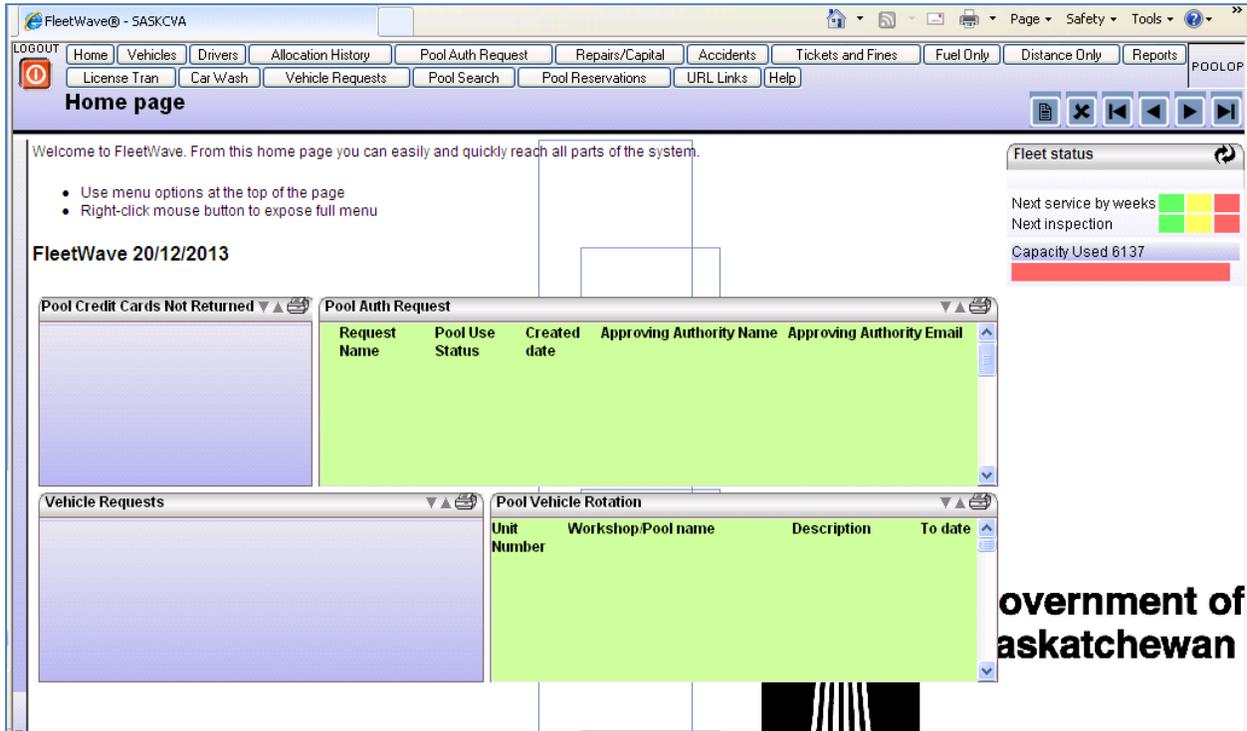


Figure 2 – Home page

Modules

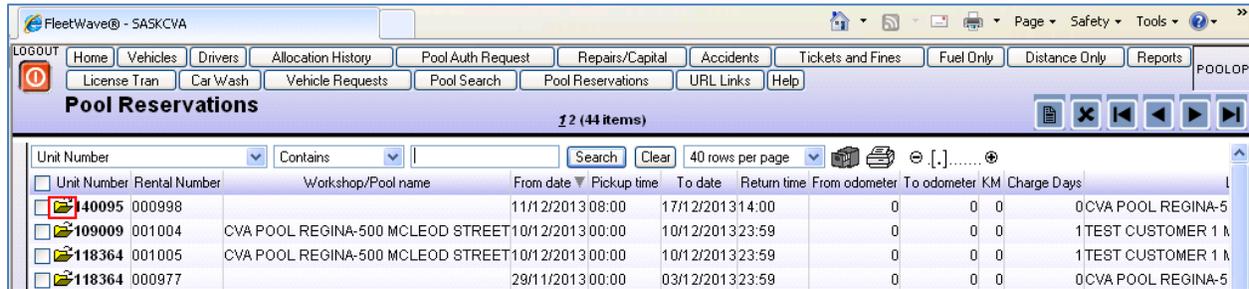
Each business/service area within FleetWave® has its own module within the system. You can navigate to any module from any other module in FleetWave® by clicking on the button at the top of the page for that module (Figure 3).



Figure 3 – Module navigation bar

Edit mode

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

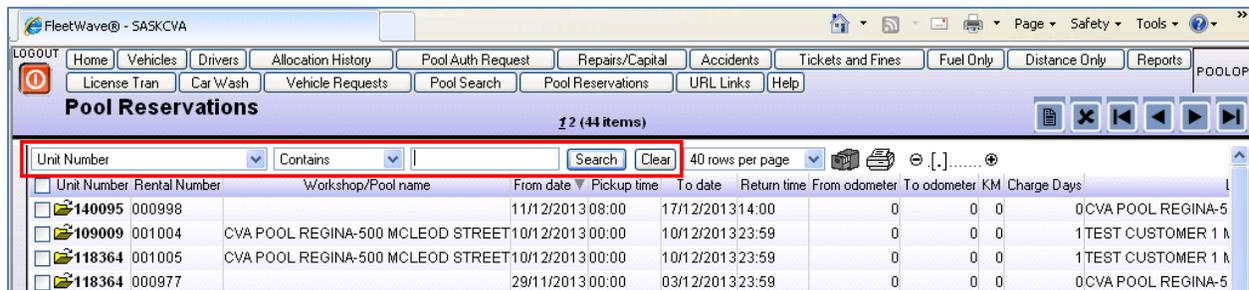


Unit Number	Rental Number	Workshop/Pool name	From date	Pickup time	To date	Return time	From odometer	To odometer	KM	Charge Days
 140095	000998		11/12/2013	08:00	17/12/2013	14:00	0	0	0	0
 109009	001004	CVA POOL REGINA-500 MCLEOD STREET	10/12/2013	00:00	10/12/2013	23:59	0	0	0	1
 118364	001005	CVA POOL REGINA-500 MCLEOD STREET	10/12/2013	00:00	10/12/2013	23:59	0	0	0	1
 118364	000977		29/11/2013	00:00	03/12/2013	23:59	0	0	0	0

Figure 4 – Entering a record in edit mode

Filter / Search function

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



Unit Number	Rental Number	Workshop/Pool name	From date	Pickup time	To date	Return time	From odometer	To odometer	KM	Charge Days
 140095	000998		11/12/2013	08:00	17/12/2013	14:00	0	0	0	0
 109009	001004	CVA POOL REGINA-500 MCLEOD STREET	10/12/2013	00:00	10/12/2013	23:59	0	0	0	1
 118364	001005	CVA POOL REGINA-500 MCLEOD STREET	10/12/2013	00:00	10/12/2013	23:59	0	0	0	1
 118364	000977		29/11/2013	00:00	03/12/2013	23:59	0	0	0	0

Figure 5 – Search toolbar

Canceling out of a record

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

AUTHORIZE POOL DRIVERS

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

1. Click in the “Pool Authorization Request” tab in the home page.

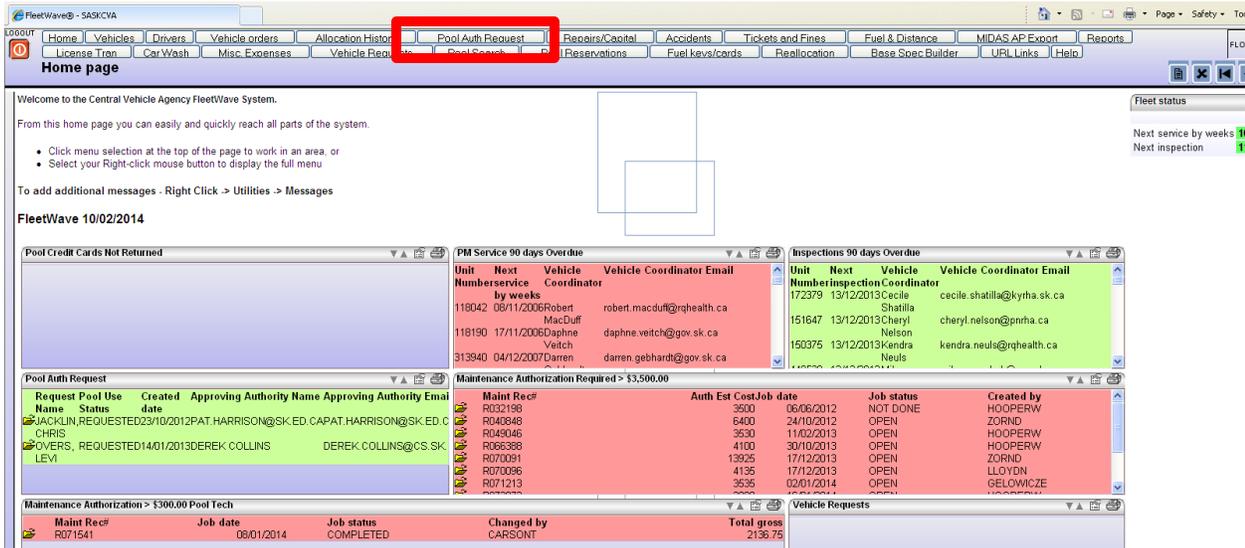


Figure 6 – Pool Auth request

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

Pool Auth Request

Complete all required fields and click "Save" at the bottom right corner of the page to receive confirmation email.

Pool Use Status: REQUESTED

First Name: DRIVER | Last Name: TEST | Initial: []

e-Mail: DRIVER.TEST@GOV.SK.CA

Office phone: 123456789

Level 3 - Customer#Vote/SubVote: ADVANCED EDUCATION , AEE0100 00037-18810

Level 2 - Customer Billing Number: ADVANCED EDUCATION, MINISTRY OF

Customer Vote: 00037

Customer Subvote: 18810

Vehicle Coordinator: Michelle McIntosh

Vehicle Coordinator Email: Michelle.McIntosh@gov.sk.ca

Vehicle Coordinator Phone: 306.787.7372

Approving Authority Name: TESTCOR

Approving Authority Email: TESTCOR@GOV.SK.CA

Do not approve requests without verifying the Approving Authority Name and Email data provided

Approving Authority Name Verified: No

Approving Authority Email Verified: No

Created by: PORTALANO

Created date: 18/02/2014

Changed by: TESTCOR

Changed date: 18/02/2014

Record Keyword: REQ

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

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

Pool Auth Request

Complete all required fields and click "Save" at the bottom right corner of the page to receive confirmation email.

Pool Use Status: APPROVED

First Name: DRIVER | Last Name: TEST | Initial: []

e-Mail: DRIVER.TEST@GOV.SK.CA

Office phone: 123456789

Figure 8– Approve pool use status.

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

POOL BOOKINGS AUTHORIZATION

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

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

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

Review and/or change a booking

1. Log in to FleetWave®.
2. Go to the “Pool Reservations” tab.



Figure 9 – Pool Reservation tab.

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

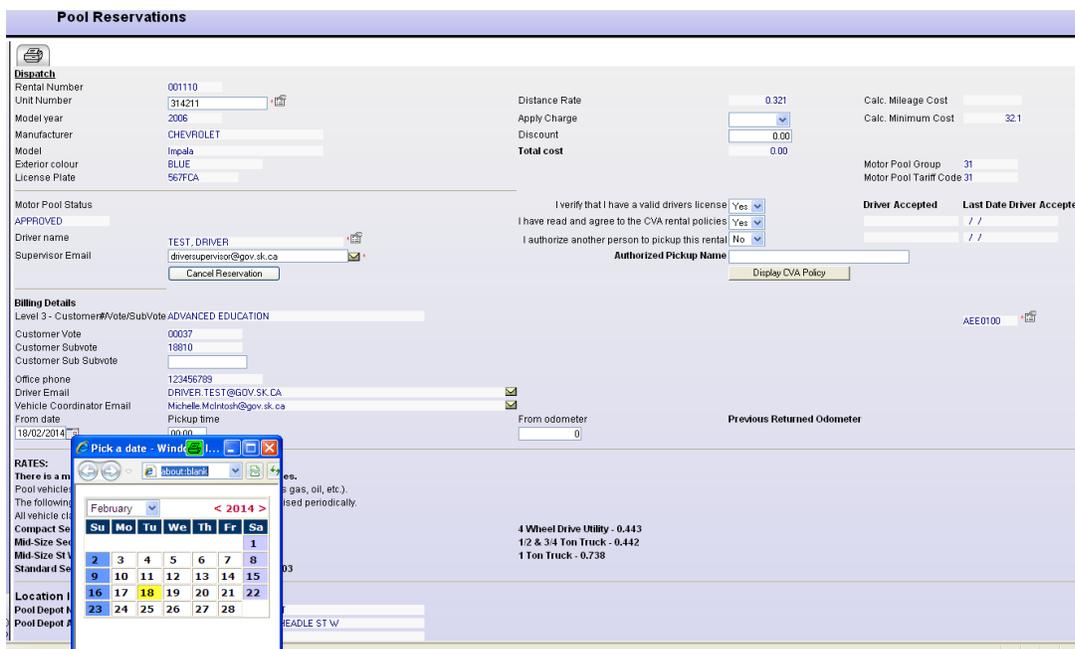


Figure 10 – Pool Reservation in edit mode for changes

Cancel a booking

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

The screenshot shows the 'Pool Reservations' interface. On the left, there is a 'Dispatch' section with fields for Rental Number (001110), Unit Number (314211), Model year (2006), Manufacturer (CHEVROLET), Model (Impala), Exterior colour (BLUE), and License Plate (567FCA). Below this is the 'Motor Pool Status' section, which is 'APPROVED', and fields for Driver name (TEST_DRIVER) and Supervisor Email (driversupervisor@gov.sk.ca). A red box highlights the 'Cancel Reservation' button. On the right, there are cost-related fields: Distance Rate (0.321), Apply Charge (2006), Discount (0.00), and Total cost (0.00). There are also dropdown menus for 'I verify that I have a valid drivers license' (Yes), 'I have read and agree to the CVA rental policies' (Yes), and 'I authorize another person to pickup this rental' (No). At the bottom right, there is an 'Authorized Pickup Name' field and a 'Display CVA Policy' button.

Figure 11 – Pool Reservation to cancel bookings.

GLOSSARY

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

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

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

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

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

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

REFERENCES

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

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

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