



Office of Fleet Management

Applications Manual



Office of Fleet Management

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FLEETOHIO

Introduction

FleetOhio is a client server application that allows organizations to capture and analyze all costs associated with owning and operating a fleet of vehicles, including equipment tracking, work order processing, preventive maintenance scheduling, parts and fuel inventory, and vehicle component warranty costs.

Installing the FleetOhio Client

The FleetOhio client must be installed on a local computer and configured to communicate with the FleetOhio server. This may require the assistance of the organization's MIS department if the user does not have sufficient privileges.

The client software may be downloaded from the following ftp site:

<ftp://ftp.das.ohio.gov>

Contact the FleetOhio administrator (614-466-6607) for the access id and password.

The installation instructions, FLEETOHIO INSTALLATION INSTRUCTIONS.pdf, are located on the ftp site.

How to use FleetOhio

Logging in

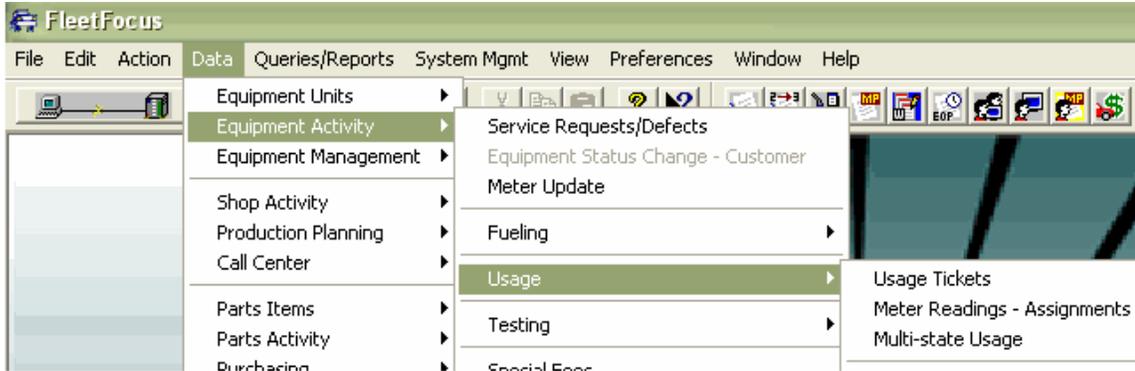
Log into FleetOhio using the User Id and Password provided. The password will not expire, but may be changed by going to the **Change Password Screen**. (System Management – Setup – Access Rights – Change Password).



Upon logging in, the FleetOhio backslash will be displayed until the user requests a specific screen.

Menus

The FleetOhio menu structure is similar to most Microsoft Windows based applications. The main menu bar leads to individual screens or submenus.



Graphical User Interface

All screens contain the following components:

Action Buttons

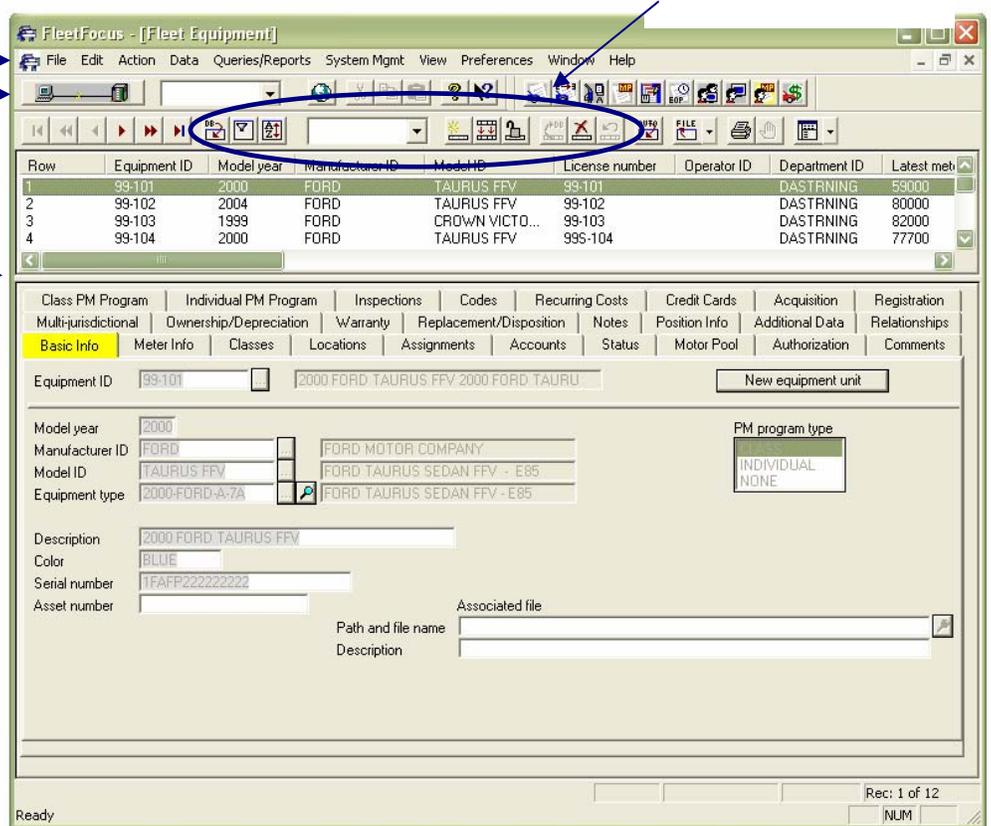
Menu Bar
Communication Indicator
(Indicates connection to the FleetOhio server)

The Grid
(Displays requested data)

Splitter Bar
(Can be moved to display more information)

The Tabs (For data entry)

Status Bar (Error messages and notification of successful task completion)



Action Buttons

Action Buttons are used to perform tasks and are grouped by their function. These tasks include inserting information, retrieving information, updating information or copying information. All FleetOhio screens include these buttons.



Retrieve Information



Get Data



Filter



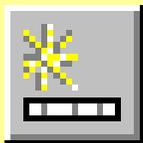
Define Sort

Get Data – Used to retrieve all data available to the user.

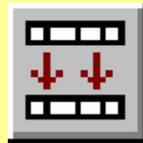
Filter – Used to retrieve data base upon criteria set by the user.

Define Sort – Sorts data based upon user defined selections.

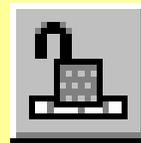
Insert or Update Information



Prepare for
Insert



Prepare for
Copy



Prepare for
Update

Prepare for Insert – Used to insert a new record.

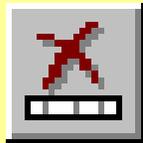
Prepare for Copy – Used to copy an existing record.

Prepare for Update – Used to update data on an existing record.

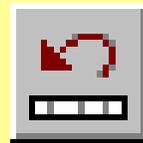
Complete a Task



Process



Delete



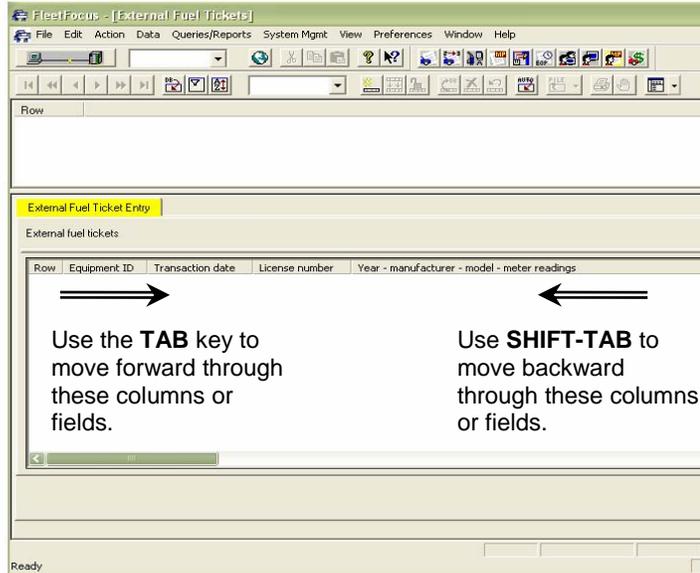
Cancel

- Process** – Saves records to the database provided there are no errors. If errors exist, they must be corrected and the Process button clicked again until successfully saved.
- Delete** – Deletes the selected record. Not available on all screens.
- Cancel** – Stops the current action. Data entered on the screen will be lost.

Keyboard Shortcuts

There are a number of useful shortcut keys that aid in data entry. They are as follows:

- **Ctrl + F** for the **Filter**
- **Ctrl + N** for **Prepare for Insert**
- **Ctrl + U** for **Prepare for Update** (Unlock)
- **Ctrl + S** for **Process** (Save)
- **Ctrl + Z** for **Cancel**
- **Ctrl + [SPACE]** to move into the group fields
- **Shift + ‘** (Shift + Quote) to copy the value in the field above.
- **Ctrl + B** to remove an entire line of data BEFORE you process (you cannot remove or change the line of data AFTER you process)



Filtering

Filtering allows for targeted data retrieval. On any screen, use the **Filter** action button to look up data that is already in the system. Clicking this button brings up a “request form” that you fill out in order to limit the data displayed. Click the Get Data button to fill the grid with matching data. The example to the right limits the retrieved data to Fords at repair location 01.



Wildcards may also be used in the “request form”. Examples are listed below. The FleetOhio wildcard is a % symbol

All equipment IDs starting with F00:

Equipment ID

All equipment with serial numbers containing 1X05:

Serial number

All equipment with asset numbers ending with 01:

Asset number

Filter Request Form

% = “anything”

Understanding Security Groups

Security groups provide and restrict user access to specified screens and related information

Levels of Access

There are two basic levels of access

1. Fleet manager access – includes **agency level access** to the following screens:
 - a. Fleet Equipment – page 7
 - b. Users Screen (Motor Pool) – page 33
 - c. Operator Screen – page 17
 - d. Meter Readings – page 19
 - e. External Fuel Tickets – page 20
 - f. Work Order Short Form – page 22
 - g. Historical Costs Screen – page 25
 - h. Motor Pool Center – page 28

2. Data entry access – includes **location specific level access** to the following screens:
 - a. Fleet Equipment – View only page 7
 - b. Meter Readings – page 19
 - c. External Fuel Tickets – page 20
 - d. Work Order Short Form – page 22
 - e. Historical Costs Screen – page 25
 - f. Motor Pool Center – page 28

Entering Information

Data Requirements

All vehicles and related expenditures must be entered into FleetOhio. It is recommended that information be entered on a monthly basis. Most vehicle related expenditures are uploaded to FleetOhio; however, agencies are responsible for entering the following items:

1. New vehicle entries.
2. Vehicle operators (drivers)
3. Vehicle mileages.
4. Vehicle fuel usage **not** purchased via the fleet card (on-site fuel tanks).
5. Maintenance and repairs **not** purchased via the fleet card.

Entering Vehicles – FLEET EQUIPMENT SCREEN

There are two methods for entering vehicles. The first involves entering a vehicle by using the **Prepare for Insert** action button. This requires entry of all mandatory fields. The second method uses the **Copy action button** to copy a similar vehicle and change only those fields that are different. Instructions for both methods are listed below. Please note that not every field is covered; only those areas that require further explanation. All mandatory fields and tabs are highlighted. Attachment C is a worksheet that can be used to gather the required information for the new vehicle.

Method 1 - Entering a vehicle using the Prepare for Insert action button

Basic Info Tab

1. Click Prepare for Insert button. Mandatory fields will be highlighted.
2. Assign Equipment ID. This is usually the license plate. E.g. 32-101.

***For non passenger vehicles with plates like S32-101, the Equipment Id is 32S-101.**

****Undercover vehicles**** it is recommended that the license plate not be used for the Equipment ID.

3. The Equipment Type field is used to identify the vehicle according to the State Purchasing Vehicle contract.

E.g. 2006-FORD-A-1. 2006 FORD FOCUS

- The model year is 2006
- The manufacturer is Ford
- 'A' refers to the automobile / passenger vehicle contract
- '1' refers to the 1st item on that contract.

Don't see the proper equipment type? Contact the FleetOhio administrator to add it.

For equipment that does not warrant an Equipment Type, choose NONE

Meter Info Tab

4. Choose the proper method of tracking utilization. For most vehicles it will be MT-MILES.

For trailers choose MT-NONE.

5. The Maximum meter value indicates the number of digits in the odometer. All new vehicles have 6 digit odometers – this is the default setting so no need to change

Row	Delete	Date	Meter number	Reason	New me
*					

Classes Tab

6. The Maintenance Class indicates the type of vehicle. Choose from the list.

7. The PM program indicates how frequently the vehicle should receive a preventative service (PM) i.e. oil changes.

Choose from the list.

If there is a preventative maintenance schedule that is needed, but does not appear in this list, contact the FleetOhio administrator.

The screenshot shows the 'Classes' tab in a software application. The 'Equipment class for:' section is highlighted, with 'Maintenance' and 'PM program' selected. A blue circle with the number '6' is next to 'Maintenance', and a blue circle with the number '7' is next to 'PM program'. The 'Equipment ID' field is empty. Below the 'Equipment class for:' section, there are fields for 'SLA equipment category', 'Benchmarking class type', and 'Asset category ID', all of which are empty.

Locations Tab

8. Choose the proper location code for the Assigned PM and Assigned Repair

9. Choose the same location code for access rights.

This determines who can see and do data entry on this vehicle

The screenshot shows the 'Locations' tab in a software application. The 'Location type' section is highlighted, with 'Assigned PM' and 'Assigned repair' selected. A blue circle with the number '8' is next to 'Assigned repair'. The 'Access rights' field is highlighted, and a blue circle with the number '9' is below it. The 'Equipment ID' field is empty. Below the 'Location type' section, there are fields for 'Station', 'Stored', 'Current', and 'Last fuel', all of which are empty.

14. Enter the fund code used to purchase the vehicle. This is used by OBM

Motor Pool Tab

****ONLY enter information on this tab if the vehicle is assigned to a motor pool and your agency uses the FleetOhio Motor Pool Module**

Authorization Tab

15. Check these three boxes to allow data to be entered on this vehicle

Class PM Program Tab

On the Classes Tab, you indicated what the frequency in which the vehicle should receive PM services e.g. every 4,000 miles or 6 months. On this tab you are indicating where to start counting. This allows FleetOhio to track when a vehicle is due for service.

16. Enter the next PM Service Number. Enter 1 in this field

17. Enter the date the vehicle would be due for a PM service according to what you chose in the PM Program field on the Classes Tab.

E.g. 6 months from purchase date

18. Enter the mileage at which the vehicle will be due for a PM service. If a new vehicle enter 0

Codes Tab

19. Choose the proper fuel type for this vehicle

NOTE:
If this is a flex fuel vehicle, also enter the second type of fuel in Fuel type 2.

- e.g. many vehicles are capable of using gasoline or ethanol.

- If this is a diesel vehicle, add biodiesel as well.

Row	Delete	Fuel/fluid type	Description	Capacity

Recurring Costs Tab

The only mandatory field on this tab is the Insurance Id. This information is required by the Office of Risk Management. There is a report in InfoCenter that can be run to meet the Risk Management's annual reporting requirements.

The other fields may be used to track fixed monthly costs. E.g. parking fees, insurance costs, etc.

The screenshot shows a software interface with a tabbed menu at the top. The tabs include: Basic Info, Meter Info, Classes, Locations, Assignments, Accounts, Status, Multi-jurisdictional, Ownership/Depreciation, Warranty, Replacement/Disposition, Notes, Class PM Program, Individual PM Program, Inspections, Codes, and Recurring Costs (which is highlighted). Below the tabs, there is an 'Equipment ID' field with a dropdown arrow. The main area contains several input fields for costs: Fixed monthly cost, Fixed insurance cost, Fixed replacement cost, Fixed licensing cost, Other fixed cost 1, Other fixed cost 2, and Other fixed cost 3. At the bottom, there is an 'Insurance rate ID' field with a dropdown arrow.

Credit Cards Tab

While this is not mandatory, it is recommended that you enter the Voyager credit card assigned to this vehicle.

The screenshot shows a software interface with a tabbed menu at the top. The tabs include: Basic Info, Meter Info, Classes, Locations, Assignments, Accounts, Status, Motor Pool, Auto, Multi-jurisdictional, Ownership/Depreciation, Warranty, Replacement/Disposition, Notes, Position Info, Additional, Class PM Program, Individual PM Program, Inspections, Codes, Recurring Costs, Credit Cards (which is highlighted), and Accounts. Below the tabs, there is an 'Equipment ID' field with a dropdown arrow and a 'New eq' button. The main area contains a table with the following columns: Row, Delete, Issuing company, Card number, Issue date, and Expiration date. The table is currently empty, with a single row containing an asterisk (*). A scrollbar is visible at the bottom of the table area.

Registration Tab

20. Enter the license plate number as it appears on the vehicle.

NOTE:

If this vehicle has a cover plate, enter that information here. The license plate information is not released to the public

Ownership / Depreciation Tab

21. Enter the number of months the agency expects to keep the vehicle.

The current minimum replacement criteria is 6 years or 90,000 miles.

22. Enter the number of months remaining. This is likely the same number of months as the Life months. Each month this number will decrease and FleetOhio will calculate the accumulated depreciation for this vehicle.

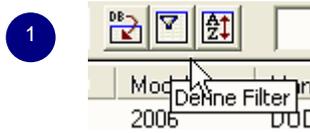
23. While this is not mandatory, you may wish to enter the vendor id where the vehicle will be taken for warranty repairs

The screenshot shows a software interface with a 'Warranty' tab selected. The 'Vendor ID' field is highlighted with a blue circle and the number 23. Other fields include 'Equipment ID', 'Expiration date', 'Expiration life meter 1', 'Expiration life meter 2', and 'Deductible'.

24. Final Step: Click the Process key and verify that the vehicle was successfully inserted. Should you receive an error message, correct the errors and click the process key.

The screenshot shows a software interface with a table and a 'Process' button. The table has columns: Row, Equipment ID, Model year, Manufacturer ID, Model ID, and Process nu. The 'Process' button is highlighted with a blue circle.

Method 2 - Entering a vehicle using the Prepare for Copy action button



If there is a similar vehicle already entered in FleetOhio, the information may be copied.

To Begin, use the Filter to display a similar vehicle.

1. Click on the Define Filter Action Button.
2. Enter information to retrieve a similar vehicle and Click Get Data

Row	Equipment ID	Model year	Manufacturer ID	Model ID	Prepare for Copy	Asset number	Operator
49	14-381	2006	DODGE	STRATUS FFV		14-381	
50	14-382	2006	DODGE	STRATUS FFV		14-382	
51	14-383	2006	DODGE	STRATUS FFV		14-383	
52	14-384	2006	DODGE	STRATUS FFV		14-384	

3. Highlight a similar vehicle
4. Click the Prepare for Copy action button

Those fields that must to be unique are removed; the remaining fields remain populated.

Enter information in the blank fields and modify other fields where the information is different for the new vehicle. E.g. Locations, Assignments, Title, etc.

Entering Drivers – OPERATOR SCREEN

The Operators Screen records driver information for those employees who utilize agency motor pools or who are assigned state vehicles on a long-term basis. These instructions address the mandatory items only. Your agency may utilize other areas of this screen

Path to Operators Screen:

Data - Equipment Units - Setup - Operators - Primary Information

Row	Operator ID	Operator name	Job title
1	DAS-JMS	JANET STACKPOLE	
2	DAS-RUSS	RUSSELL PERRY	
3	DAS-SH01	SHANE HARDING	

Personal Info Tab

1. Click on the Prepare for Insert action button.

2. Enter an Operator Id for this driver. The format is as follows:

Three digit agency code “_” first letters of the driver's last name.

E.g. DAS-SMITH
BWC-JOHNS

This Id must not match an existing Operator Id. It is the unique identifier for this driver.

3. Enter the full name of the driver.

Employment Info Tab

- Choose the Department Id where the driver is assigned
- Choose the account id that is associated with the driver's department

- Choose the agency code
- Enter the driver's email address

- This Active checkbox indicates whether the driver will appear on other

FleetOhio screens. Check if this is a current employee of your agency. Uncheck if the employee information is no longer active.

License Info Tab

- Enter the driver's license number and license expiration date.

Steps 1 – 9 apply to both assigned drivers and motor pool drivers. If the current driver is not a motor pool user, there is no need to go further. Save the driver information by clicking the Process action button.

The following instructions relate to those drivers who will be utilizing motor pool vehicles.

Motor Pool Tab

This tab should be completed if the FleetOhio motor pool module is used. It assigns the driver to one or

Personal Info | Employment Info | License Info | Credit Cards | Authority | Motor Pool | Comments | Files

Operator ID

Preferred dispatch location ID Allowed to rent from all locations **1**

Allowed to rent from these locations in addition to the preferred location

Row	Delete	Location ID	Location name
1	2	DASMP1	DAS - SOT- MOTOR POOL
*			

Preferred pool vehicle type Allowed to rent from all pool vehicle types **3**

Allowed to rent these types in addition to the preferred type

Row	Delete	Pool vehicle type	Description
1	4	DAS-08 P VAN	EIGHT PASSENGER V
2		DAS-MPV	MINI PASSENGER VA
3		DAS-MS4DR AF	MID-SIZE STATIONAR

Pool unit preferences

more motor pools and associated vehicle types. This is essential if the agency is utilizing the web motor pool module to allow motor pool customers to manage their own reservations (see motor pool module section for more details).

1. Choose the preferred dispatch location Id. This is the motor pool that the driver will use most often.
2. Additional motor pools may be added as 'back up' motor pools.
3. Select a preferred pool vehicle type for this driver. These are specific to each agency.
4. Add the remaining vehicle types available at the locations listed in step two
If these additional types are not listed, they will not be displayed to the motor pool user when he or she makes reservations.
5. Save the driver information by clicking the Process action button.

Entering Mileage Information – METER READINGS SCREEN

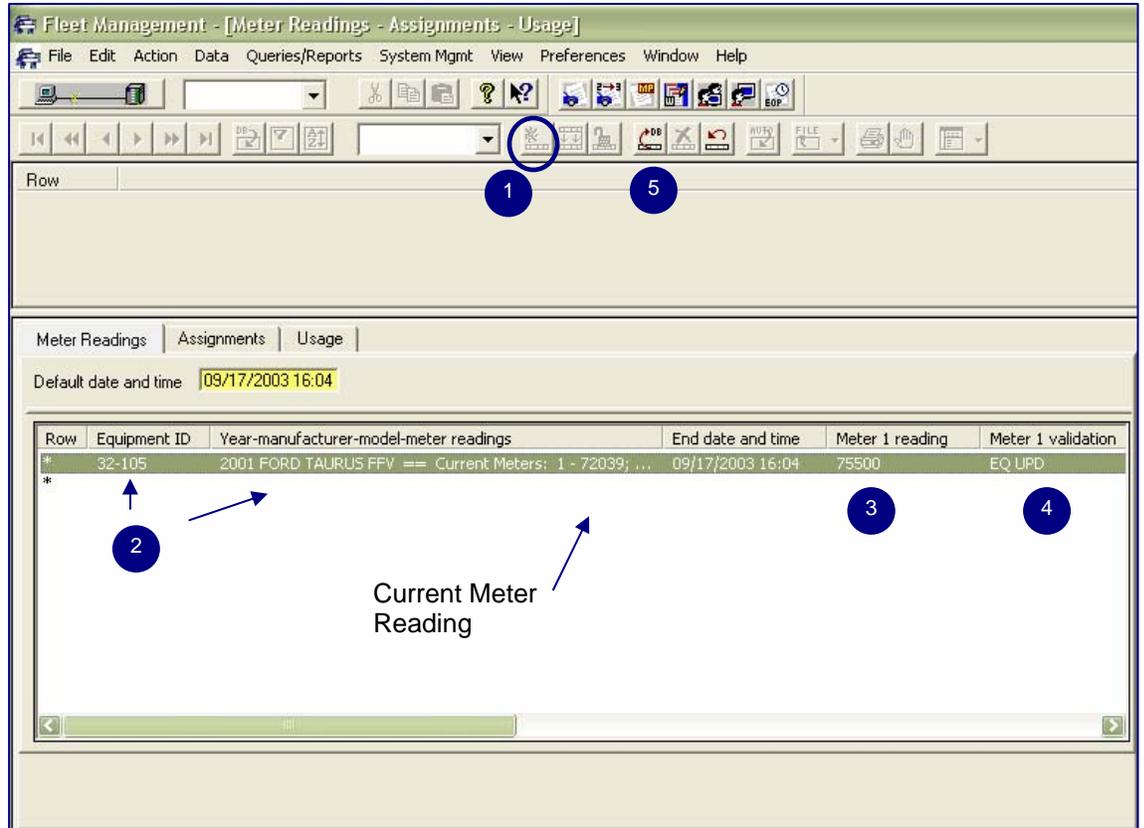
The Meter Reading screen is used to reflect vehicle usage. In most cases meter will refer to odometer readings; however FleetOhio is also capable of tracking vehicle usage by hours. See Instructions for entering a new vehicle

Screen Location: Data – Equipment Activity – Usage – Meter Readings-Assignments-Usage

1. Click on the Prepare for Insert action button.

2. Enter the vehicle's Equipment Id. This will display the vehicle's description and current meter reading.

3. Enter end of the period meter reading. *This could be end of the month or end of the fiscal year.*



4. Select EQ UPD in the meter validation. This updates the vehicles mileage record. Meter validation is discussed in greater detail in the following section.

Multiple vehicles may be entered on this screen. To do so, go to the next line and repeat steps 2 – 4 as necessary until all vehicles are entered.

5. Click the Process action button to save.

Entering Fuel – EXTERNAL FUEL TICKETS SCREEN

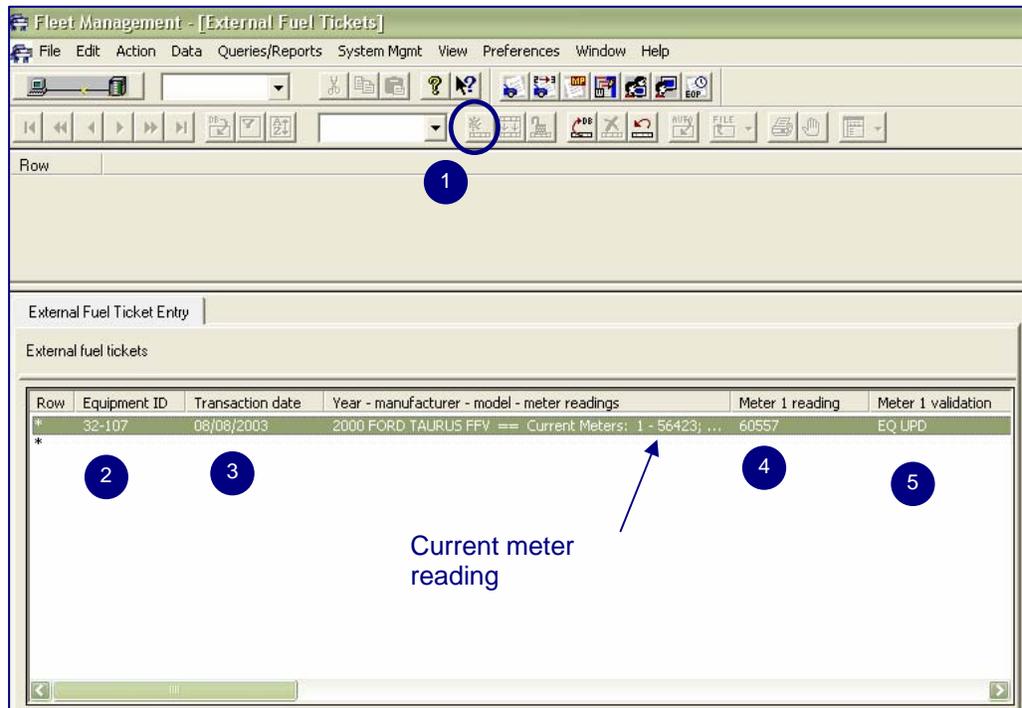
Fuel purchased using the state fleet card is uploaded to FleetOhio. Fuel purchased by other methods must be manually entered in FleetOhio. This includes fuel obtained from on-site fuel tanks and fuel obtained from other agencies (ODOT etc.).

Screen Location: Data – Equipment Activity – Fueling – External Fuel Tickets

1. Click on the Prepare for Insert action button.

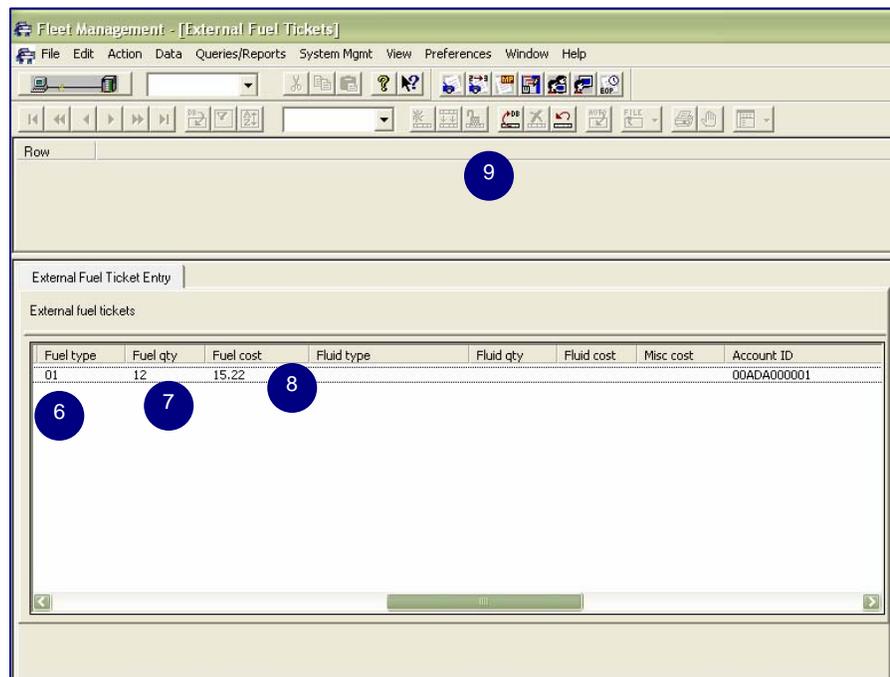
2. Enter the vehicle's Equipment Id. This will display the vehicle's description and current meter reading.

3. Enter the fuel transaction date



4. Enter the meter reading at the time of the transaction. If this is not known, enter the mileage displayed on the screen.

5. Choose the appropriate meter validation.



If the transaction meter reading is **greater i.e. newer** than the current meter, choose **EQ UPD**. This records the meter reading for the transaction and as the new current meter reading.

If the transaction meter reading is **less i.e. older** than the current meter, choose **NO EQ UPD**. The meter reading is recorded for the transaction only. The current meter reading will remain the same.

6. Select the fuel type
7. Enter the fuel quantity.
8. Enter the fuel cost

Multiple fuel transactions may be entered on this screen. To do so, go to the next line and repeat steps 2 – 8 as necessary until all transactions are entered.

9. Click the Process action button to save.

Entering Preventative Maintenance and Repairs – WORK ORDER SHORT FORM

Vehicle maintenance / repairs purchased using the state fleet card are uploaded to FleetOhio; all other maintenance / repairs must be manually entered into FleetOhio.

FleetOhio records vehicle *repair* costs separately from preventative *maintenance (PM)* costs to allow managers to evaluate fleet expenditures more effectively. FleetOhio accomplishes this by using task codes; each code is designated as either a repair or PM task. This also allows for one work order to comprise both repair and PM work and still capture each cost separately. The following instructions provide an example of entering expenditures where the vehicle received repair and PM work during the same shop visit.

In the example invoice a vehicle had the following services performed:

1. Tire replacement
2. Lube oil and filter (LOF)
3. Wiper blade replacement
4. Front disc brake pads replaced

		BILL TO: DEPT OF ADMINISTRATIVE SERVICE		4200 SURFACE RD		COLUMBUS, OH 43228				
		PHONE 1.....	(614)466-6884	VEH YEAR/MAKE.	00 FORD					
		PHONE 2.....	(614)466-6611	VEHICLE MODEL.	TAURUS LX					
		DATE REQUESTED	12/05/03	VEHICLE COLOR.	BROWN					
		TIME REQUESTED		LICENSE/STATE.	32-194 /					
		RETURN PARTS..	NO	ODOMETR IN/OUT	066194 / 66194					
		SALESMAN.....	002 / 026	ENG. SIZE.....	V6-182 3.0L OHV					
		VEHICLE ID #..	1FAPP53Z1YG198239	PRIOR INVOICE.	035654					
		ACCOUNT #	COB TC GVT TYPE/STATE							
		632409775	4 01 09775 3 OH							
SLSM	TECH	PRODUCT CODE	BC	QTY	DESCRIPTION	CORE	PARTS	LBR/EXCISE	LINE	TOTAL
002		187-009-016-0	G	4	P215/60R16 94T S1 REGATTA 2 B06RPTL		67.09	.00	268	36
		GS NUMBER.			QTY. 4 NO. MKX8NTRM4203					
002	058	041-263	R	4	NEW VALVE STEM		2.99	.00	11.96	
002	058	044-275	R	4	WHEEL BALANCE - AUTO - LIFETIME		5.95	10.00	63.80	
002		071	R	4	SCRAP TIRE DISPOSAL AUTO		2.50	.00	10.00	
002	058	077-205	R	1	LUBE-OIL CHANGE-OIL FILTER (UP TO 5 QTS)		10.00	9.00	19.00	
					QUARTS. WEIGHT					
		PH400BULK		1.00	OIL FILTER					
002	058	046-105	R	1	RECYCLABLE FLUIDS DISPOSAL FEE		.00	1.00	1.00	
002	058	046-900	R	1	VEHICLE MAINTENANCE INSPECTION		.00	.00	.00	
					CHECK UNDER-HOOD FLUIDS; INSPECT: BRAKES, BELTS, HOSES, TIRES, HEADLIGHTS, BULBS, WHEEL BEARING LOOSENESS, BATTERY/CABLES (VISUAL), AIR FILTER, EXHAUST, WIPERS, SHOCKS/STRUTS & SUSPENSION					
002	058	059-202	R	1	REPLACE WIPER BLADES		28.28	2.24	30.52	
		31-24		1.00	WIPER BLADE					
		31-20		1.00	WIPER BLADE					
002	058	052-218	R	1	REPLACE FRONT DISC BRAKE PADS		113.03	72.95	185.98	
		PG0601QS		1.00	F.O.E. CERAMIC PADS					

Tires

'A' Service

Wiper Blades

Brake Pads

Basic Info Tab

1. Click on the Prepare for Insert action button.
2. Leave Job Type at REPAIR for all entries. This simplifies data entry and does not affect the separate expenditures for PM and repair work.
3. Enter the Equipment ID for the vehicle
4. Enter the Meter at time of Service
5. Choose the appropriate meter validation.

If the transaction meter reading is **greater** than the current meter, choose **EQ UPD**. This records the meter reading for the transaction and as the new current meter reading.

If the transaction meter reading is **less** than the current meter, choose **NO EQ UPD**. The meter reading is recorded for the transaction only. The current meter reading will remain the same.
6. Enter the date of service. Also check the 3 boxes and complete the dates. The 3 dates represent when the work was finished, when the work order was closed and when the vehicle was returned to service. This is used to track down time for the vehicle. If your agency is not interested in tracking this, then put the same date and time in each box.

Basic Info | Comments | Notes | Labor | Parts | Commercial | Output Control | Files

Work order ID: DASW02 | 2005 | 123 | Equipment ID: 32-194 | Job status: OPEN

Job type: REPAIR | Equipment ID: 32-194 | License number: 32-194

Meter 1: 66194 | Meter 1 validation: NO EQ UPD | Life meter 1 usage: 92951

Meter 2: | Meter 2 validation: | Employee ID: | Vendor ID: |

Repair reason ID: J | OTHER

Work class: | Date and time in: 12/05/2003 08:42

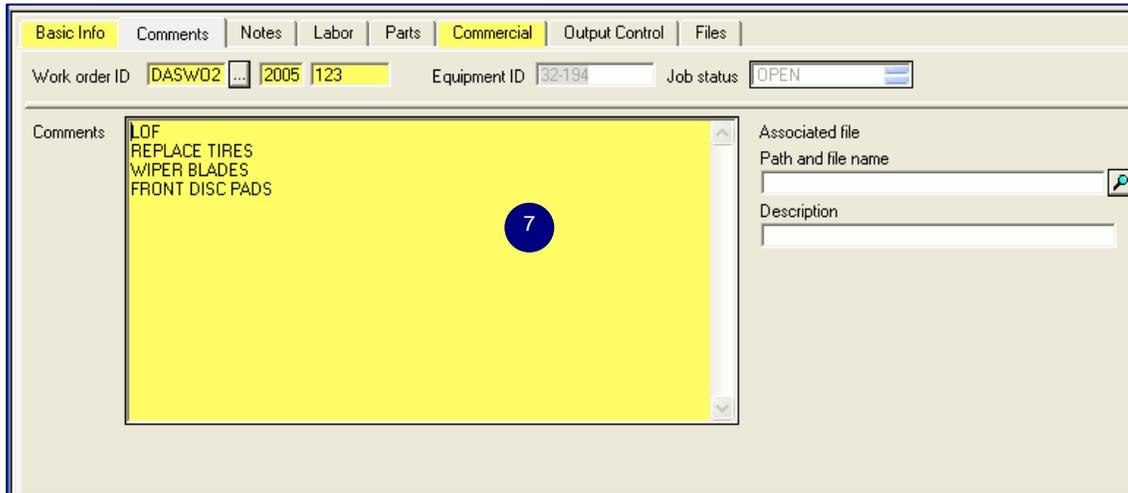
Warranty work: YES | NO | UNKNOWN | Date and time finished: [x] 12/05/2003 08:42

PM service: | Date and time closed: [x] 12/05/2003 08:42

PM scheduled: | Date and time in service: [x] 12/05/2003 08:42

Estimated cost: | [x] Approved

Reference order ID: |

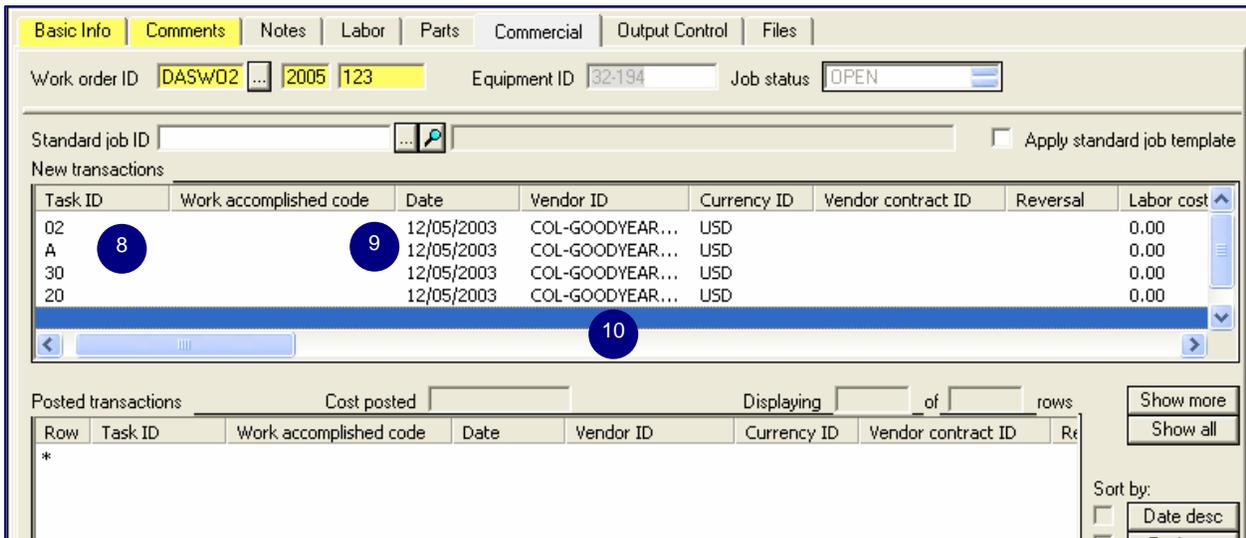


Comments Tab

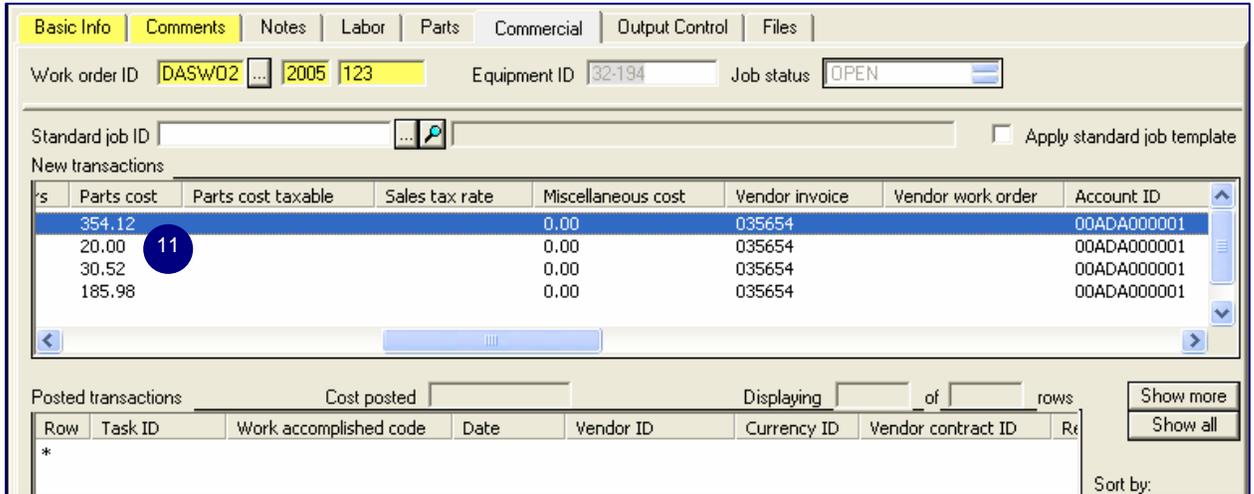
7. Enter a brief description of the work.

Commercial Tab

8. Select the appropriate Task Id. See list of task codes in Appendix A. Each line item reflects work done in the above invoice.
9. Enter the date of service



- Select the vendor who performed the work. Vendors are arranged by the city in which they are located. The city is abbreviated to 3 characters.
- Enter the cost for each line item



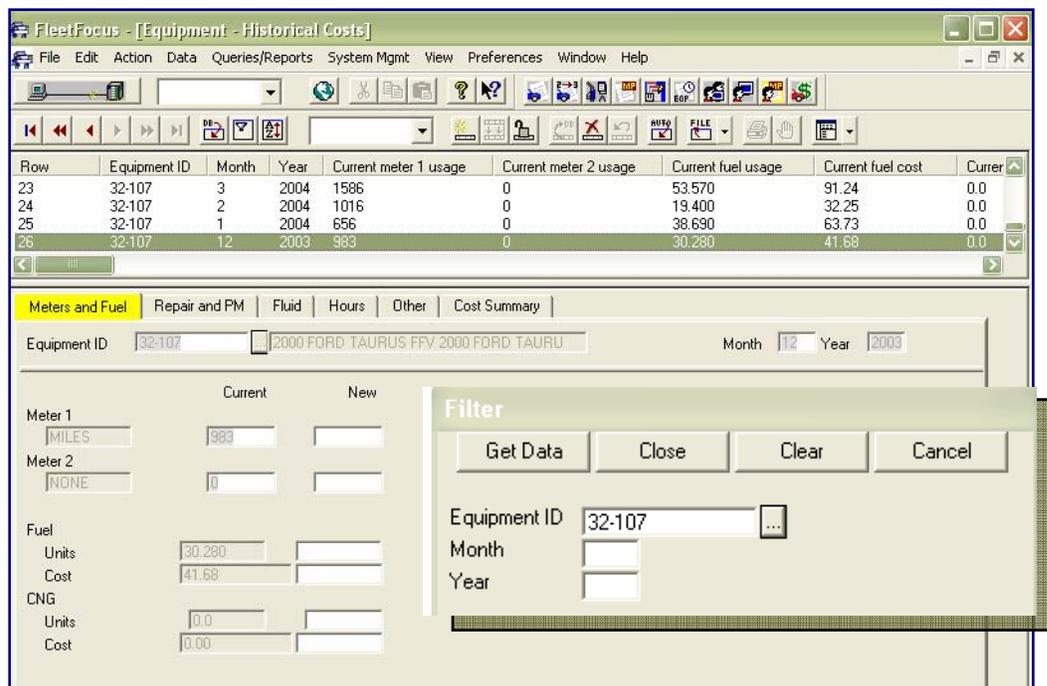
- When all lines of data are entered, click the Process Key

Historical Cost Screen

The Historical Costs screen displays costs associated with vehicles by month and year. It is particularly useful when seeking information for only one vehicle. The data is organized by tabs.

Screen Location:
Data – Equipment
Units – Historical
Cost

To begin, click on the Filter action button. Complete the fields as needed.



Customizing FleetOhio

Toolbar Shortcuts

Shortcuts buttons may be setup to display commonly used screens. These shortcuts allow access to screens without navigating through the menu bar.



To create shortcut buttons, go to the Preferences menu – Toolbar - Setup

1. The Available Screens area is set up like the menu. Navigate to the screen for which a toolbar button is needed.
2. Click Add. The screen will appear in the Selected Screens area
3. When all the screens are selected, click OK. Then go back to the Preferences menu and save the toolbar



Toolbar setup

Available Screens

- Data
 - Equipment Units
 - Equipment Activity
 - Service Requests/Defects
 - Equipment Status Change - C...
 - Meter Update
 - Fueling
 - Internal Fuel Tickets
 - External Fuel Tickets
 - Automated Fuel Tickets
 - Setup
 - Usage

Selected Screens

Screen	Menu Path
Fleet Equipment	Data Equipment Units
Renumbering	Data Equipment Units
Automated Fuel Tickets	Data Equipment Activity Fu...
Motor Pool Center	Data Equipment Activity Mo...
Work Order - Short Form	Data Shop Activity
End of Period	System Mgmt
User Groups	System Mgmt Setup Access...
Users	System Mgmt Setup Access...
Primary Information	Data Equipment Units Setu...
Historical Costs	Data Equipment Units

OK

Cancel

Move up

Move down

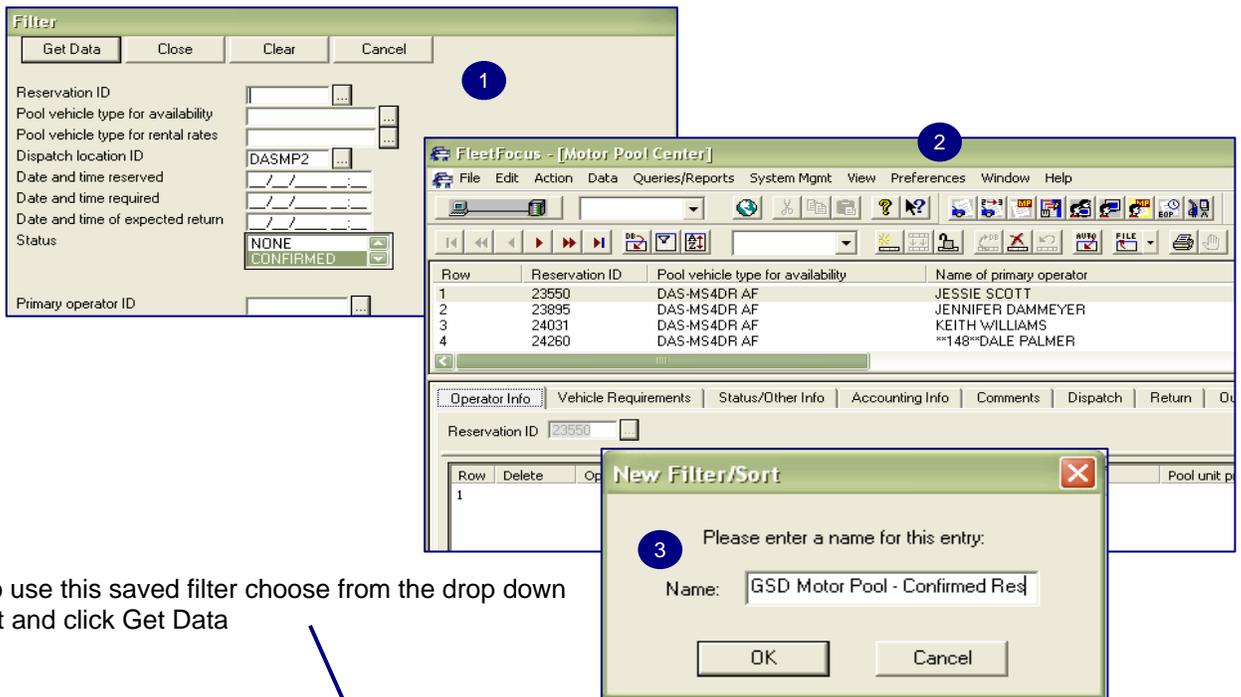
The order can be changed by selecting the screen and clicking the Move up and Move down buttons

Saving Filters and Sorts

Commonly used queries may be retrieved quickly by saving the data entered in the Filter. The following are some common uses

- Confirmed motor pool reservations
- Active vehicles at a particular location

1. On Any screen, use the **filter button** to retrieve information. Use the **sort** action button if needed to change how the data is sorted.
2. On the menu, go to Preferences – Filter/Sort – Save Current
3. Enter a name for the saved Filter/Sort and click OK



4. To use this saved filter choose from the drop down list and click Get Data



Motor Pool Module

Introduction

FleetOhio offers real-time motor pool management, including booking, tracking, dispatching, and billing. Setup may be customized to meet agency business rules. The motor pool module consists of two components.

1. The Motor Pool Center screen in FleetOhio – This screen is used to book reservations, dispatch and return vehicles.
2. The Motor Pool Web module – This is a customer access point for motor pool customers to book their own motor pool reservations.

Setup

The Office of Fleet Management will assist in all aspect of establishing an agency motor pool. To summarize, the setup consists of the following:

1. Identify vehicles that will be dedicated to the motor pool
2. Identify the agency business rules, i.e. will the agency charge for vehicle use?
3. Identify the employees who will utilize motor pool vehicles. This information is used to create driver profiles and is needed for the web module. (See section entitled Entering Drivers)

Reserving, Dispatching, and Returning Vehicles

Reservations are simple to manage; the following instructions detail the reservation cycle.

Screen Location: Data – Equipment Activity – Motor Pool – Motor Pool Center

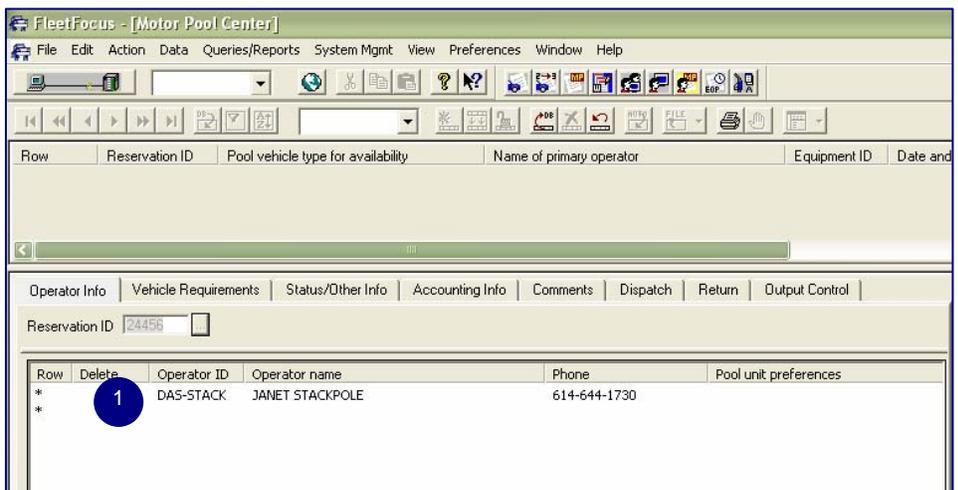
Reserve a motor pool vehicle for a future date

Reservations may be made for an advanced date. These are placed in a **CONFIRMED** status. This means a vehicle is available for the required time frame; a particular vehicle is not assigned at this time. The following information is entered for an advanced reservation: 1) who will be driving the vehicle, 2) what type of vehicle is needed, 3) when will the vehicle be picked up and returned.

Operator Info Tab

1. Enter the driver's Operator ID. This will display much of the required information

**If the customer does not yet have an Operator Id, go to the Operator Screen to create one. See section on entering drivers.



Vehicle Requirements Tab

- The pool vehicle type for availability fills in with the default vehicle type for the driver. If an alternate vehicle type is required, replace with the appropriate type.

FleetFocus - [Motor Pool Center]

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

Row Reservation ID Pool vehicle type for availability Name of primary operator Equipment ID Date and

Operator Info Vehicle Requirements Status/Other Info Accounting Info Comments Dispatch Return Output Control

Reservation ID 24456

Pool vehicle type for availability DAS-MS4DR AF MID-SIZE SEDAN 4DR - AFV - (DAS RENTAL RATE)

Screen message

Pool vehicle type for rental rates DAS-MS4DR AF MID-SIZE SEDAN 4DR - AFV - (DAS RENTAL RATE)

Hourly rate 0.00
Daily rate 41.00
Weekly rate 0.00
Monthly rate 0.00

Status/Other Info

- Several pieces of information are gathered on this tab.
 - Dispatch Location Id – this will be filled in according to driver defaults. Change as needed.
 - Date and time the vehicle is required and date and time it is expected back. Adjust as needed.

FleetFocus - [Motor Pool Center]

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

Row Reservation ID Pool vehicle type for availability Name of primary operator Equipment ID Date and

Operator Info Vehicle Requirements Status/Other Info Accounting Info Comments Dispatch Return Output Control

Reservation ID 24456

Dispatch location ID DASMP2 JIRFACE ROAD- MOTOR POOL Status NONE

Calendar ID 5/40-0800 5 DAY 40 HOUR 08:00 START

Date and time reserved / /
Date and time required 09/11/2006 08:00
Date and time of expected return 09/11/2006 17:00

Destination city COLUMBUS / SOT
Destination state OH
Qty of passengers 1

Meter only Primary operator ID

Accounting Info

- The Department Id and Account Id fill in according to the Operator Id for the driver.
- This is all of the required information for an advanced reservation. To complete this reservation, click the Process action button.

FleetFocus - [Motor Pool Center]

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

Row Reservation ID Pool vehicle type for availability Name of primary operator Equipment ID

Operator Info Vehicle Requirements Status/Other Info Accounting Info Comments Dispatch Return Output Control

Reservation ID 24456

Department ID DAS-GDFT OFFICE OF FLEET MANAGEMENT
Account ID ODDASTRAN00 DAS - FLEET MANAGEMENT

Cost center

Account info 1
Account info 2
Account info 3
Account info 4
Account info 5

Account apportionment for billing

Row	Delete	Account ID	Account name
*			

Note: A successful insert indicates the reservation is confirmed.

If there are insufficient vehicles for that time, it will display a message. If there is another vehicle type available for the requested time period, FleetOhio will indicate this as well.

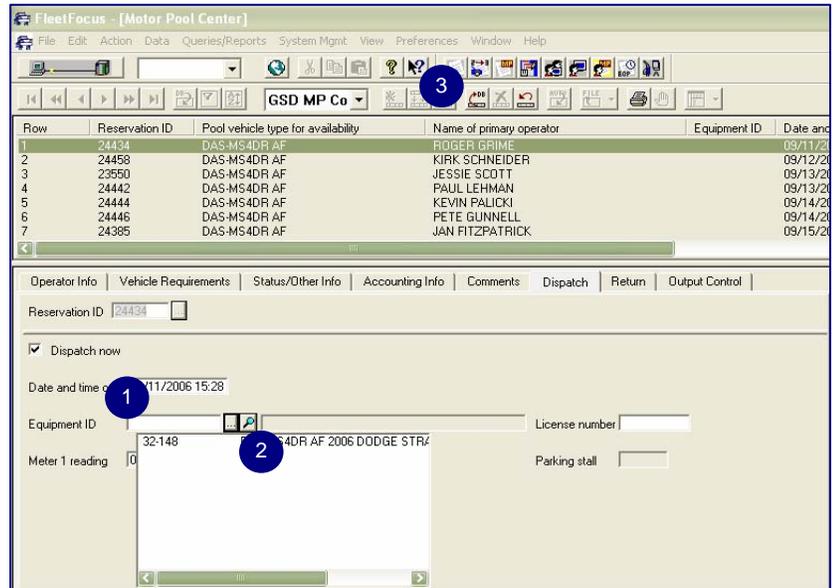
Reserve and dispatch a motor pool vehicle

A reservation may also be entered and dispatched at the same time. To do this, **first follow the steps 1 – 4 above then continue with the following instructions.**

Dispatch Tab

1. Click the Dispatch now checkbox. This will fill in the date and time out.
2. Select a vehicle from the drop down box.
3. Click the Process action button. A successful insert indicates the reservation is complete. This reservation is now in a Dispatched status

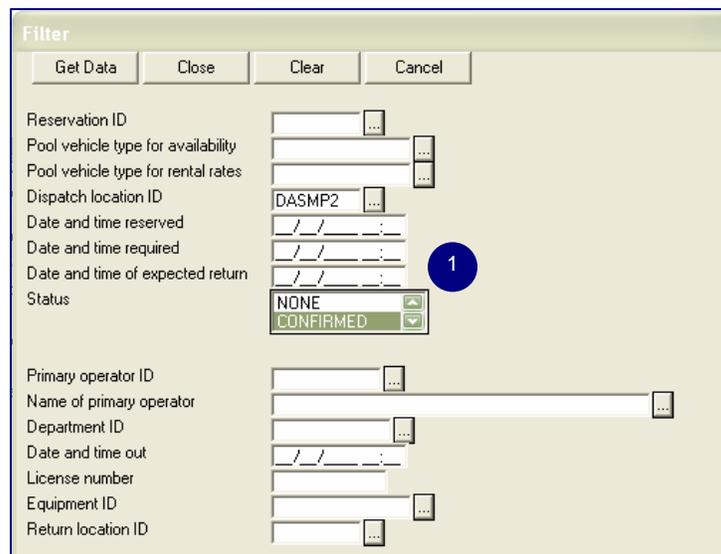
If there are insufficient vehicles for that time, it will display a message. If there is another vehicle type available for the requested time period, FleetOhio will indicate this as well.



Dispatch a motor pool vehicle for a confirmed reservation.

To dispatch a reservation that has been confirmed, use the filter to pull up the reservation and then dispatch.

1. Use the filter to retrieve the confirmed reservations for the motor pool location

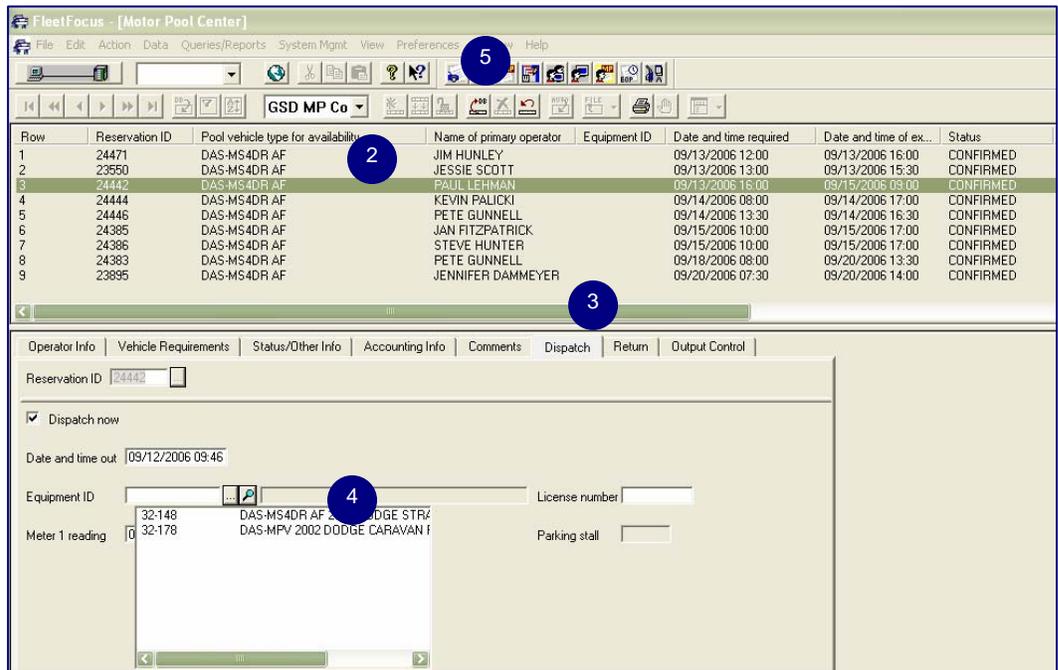


2. Highlight the reservation to be dispatched and click the Update action button. This will unlock the record.

3. Go to the Dispatch tab. Click the Dispatch now checkbox. This will fill in the date and time out.

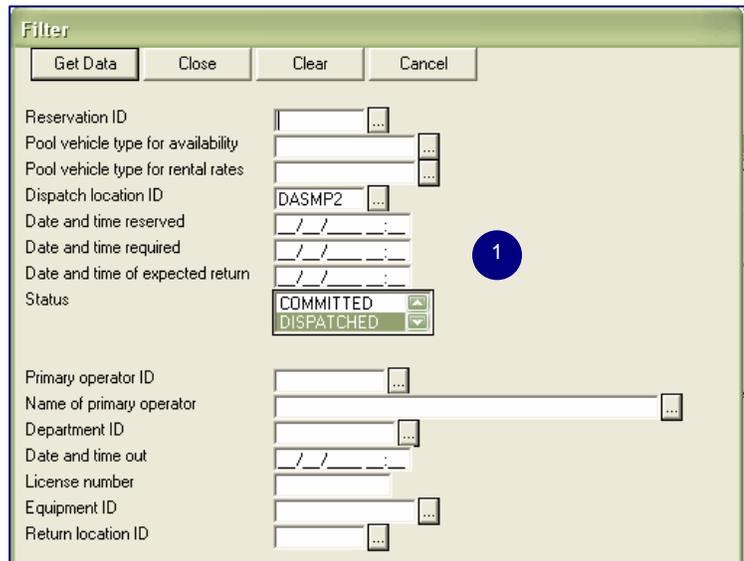
4. Select a vehicle from the drop down box.

5. Click the Process action button. This reservation is now in a Dispatched status.



Return a dispatched vehicle.

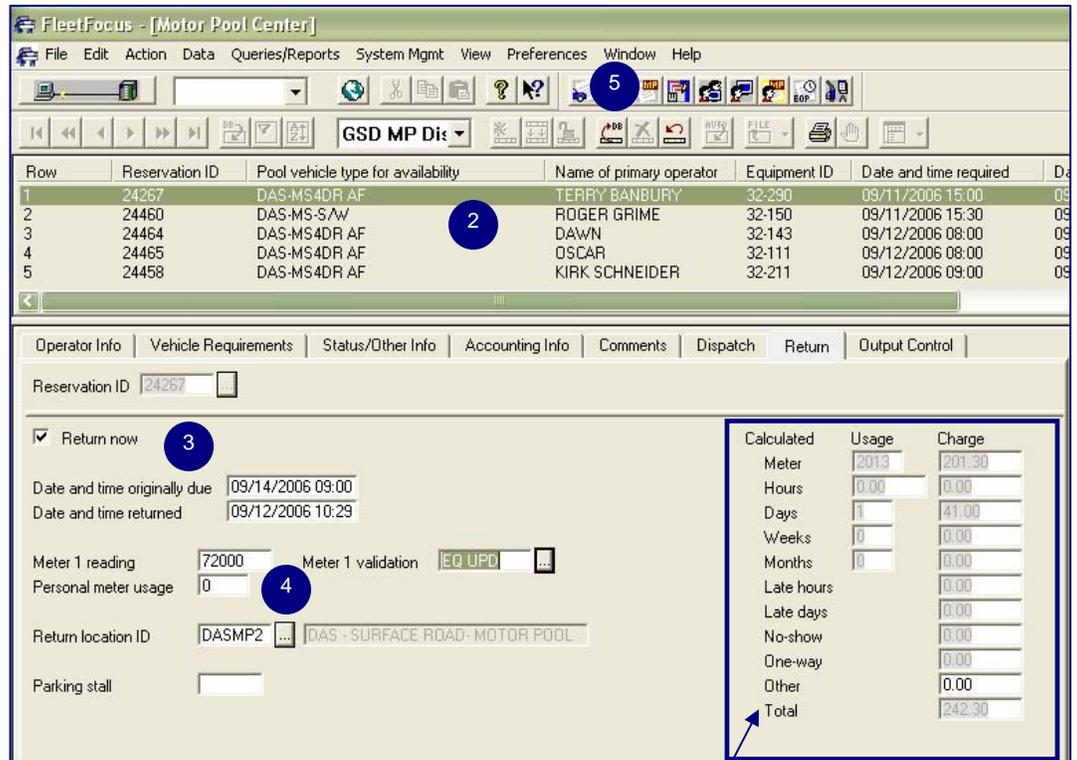
1. Use the filter to retrieve the dispatched reservations for the motor pool location



2. Highlight the reservation to be returned and click the Update action button. This will unlock the record.

3. Go to the Return tab. Click the Return now checkbox. This will fill in the date and time out.

4. Enter the returned mileage for the vehicle. Choose EQ UPD to update the mileage for the vehicle



5. Click the Process action button.

This area displays charges for the reservation. These are set according to the agency's business rules.

Web Motor Pool Module

FleetOhio also has a web customer interface to allow motor pool customers to reserve, cancel and modify their own motor pool reservations using the internet. The dispatching and returning process remain the same.

There is additional setup involved to create user accounts for the customers. The following explains this setup process.

The account setup involves two screens:

1. **Operator Screen** – (See section entitled Entering Drivers)
2. **User Screen** – This screen is used to establish a user id and password for the customer.

These two screens work in conjunction to establish a user id and set motor pool defaults. The User screen establishes a user id and password that the motor pool customer will use to log into the web reservation portal. The Operator Screen records information regarding the employee's license information, department assignment, billing information and motor pool defaults. These two screens are linked by the operator id (see screen shots below).

The address for the web motor pool module is:

<http://fleetohio.das.ohio.gov/CustomerAccess/FAMotorPool/MotorPool.aspx>

User Screen

FleetFocus - [Users]

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

Row	User ID	User name	Phone	User employee ID	User operator ID	Sess
1	DASJANE...	JANET STACKPOLE	614-466-6607		DAS-STACK	

Basic Info Groups Currently Assigned Comments Security Options Pri...

User ID: DASJANETS JANET STACKPOLE

Name: JANET STACKPOLE
 Phone: 614-466-6607
 Password:
 Email address: JANET_STACKPOLE@DAS.STATE.OH.US
 Associated employee ID:
 Associated operator ID: DAS-STACK JANET STACKPOLE
 Session location ID:
 User currency ID: USD U S DOLLARS
 Report group ID: SYS ADMIN
 Associated vendor ID:
 FASuite InfoCenter URL: HTTP://FLEETOHIIO.DAS.OHIO.GOV
 Supported web applications:

Operator Screen

FleetFocus - [Operators - Primary Information]

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

Row	Operator ID	Operator name	Job title	Occ
1	DAS-STACK	JANET STACKPOLE		

Personal Info Employment Info License Info Credit Cards Authority Motor Pool Comments Files

Operator ID: DAS-STACK JANET STACKPOLE

Name: JANET STACKPOLE Social security number:
 Address: 4200 SURFACE ROAD Salutation:
 Line 2:
 Line 3:
 Line 4: COLUMBUS OH 43228 Date of birth:
 Home phone:
 Pager number:
 Fax number:
 Gender: MALE

Setup procedures

Operator Screen Setup

1. Determine if the motor pool customer has an Operator Id. If the customer has used a motor pool or has had an assigned vehicle in the past, there may already be an entry on the Operator Screen.
 - a. Go to the Operator Screen –
 - b. Click on the Filter action button to search by the customers name
 - c. If there are no entries, follow the steps for creating a new driver on the Operator Screen, page 17.

Filter

Get Data Close Clear Cancel

Operator ID: ...
 Operator name:
 Department ID: ...
 Account ID: ...
 Company ID: ...
 Active:

User Screen Setup

1. Go to the User screen - **System Mgmt - Setup - Access Rights - Users**

There is a template that should be used to create motor pool users

- To access this template, click on the Filter action button and Enter TEMPLATE for the User ID and click Get Data. This will display the template that will be copied.
- Click the Prepare for Copy action button. This will allow you to copy this template.

- In the User ID field - enter the Operator ID that was used on the Operator Screen. This will be the motor pool user's USER ID

- Enter the customer's full name

- Enter a password.

- To link this information to the Operator ID Screen, enter the Operator Id in the associated operator id field. In this example it is DAS-STACK

- Choose USD as the Currency Id

- Click the Process action button to save.

Distribute the user id and password to the customer. The motor pool customer is now ready to access the motor pool module.

InfoCenter Reporting

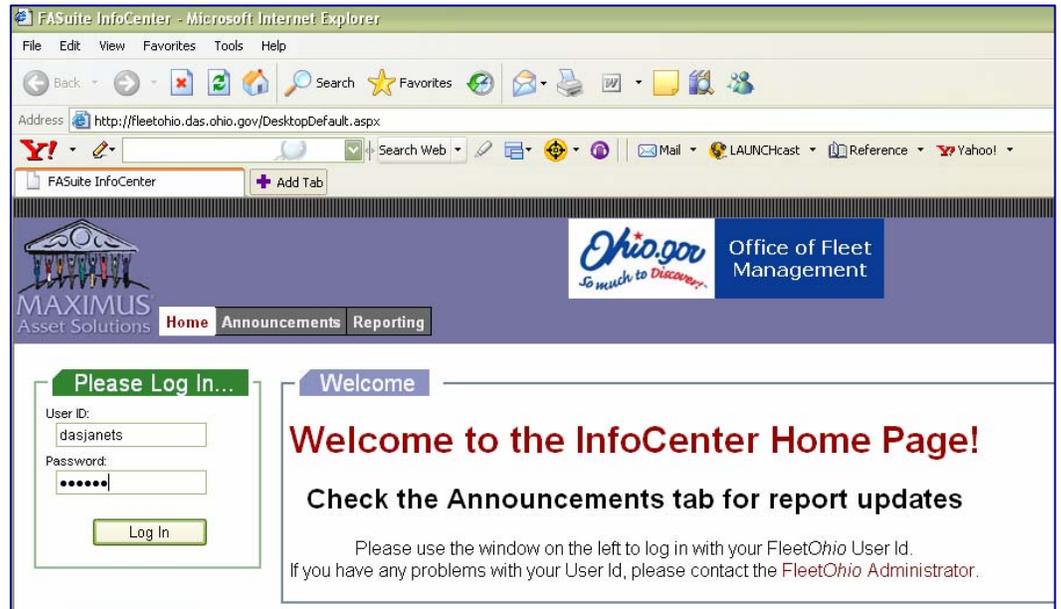
Introduction

InfoCenter is an additional feature to FleetOhio; it allows users to run reports via the internet. To access InfoCenter, go to <http://fleetohio.das.ohio.gov> or click on the world icon in FleetOhio.



Log in using your FleetOhio user id and password.

Reports are located on the Reporting Tab.



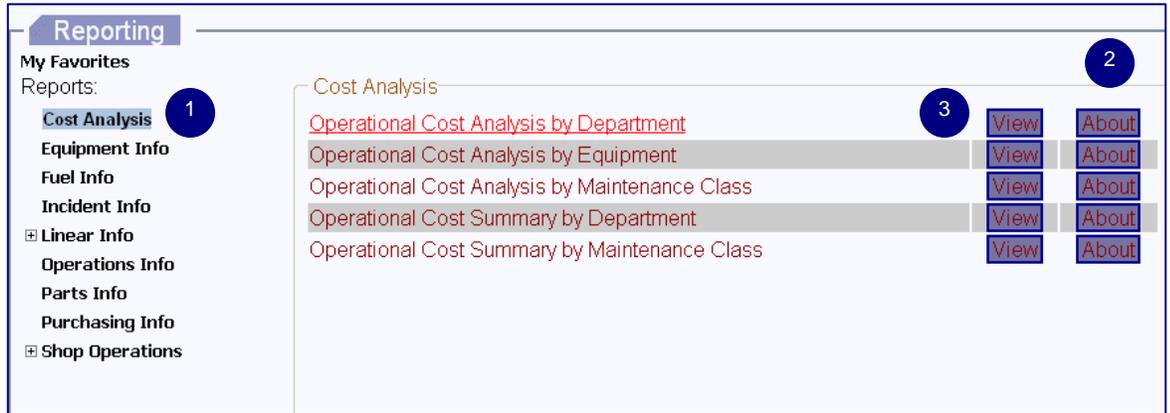
How Reports Are Organized

Reports are organized by the following categories:

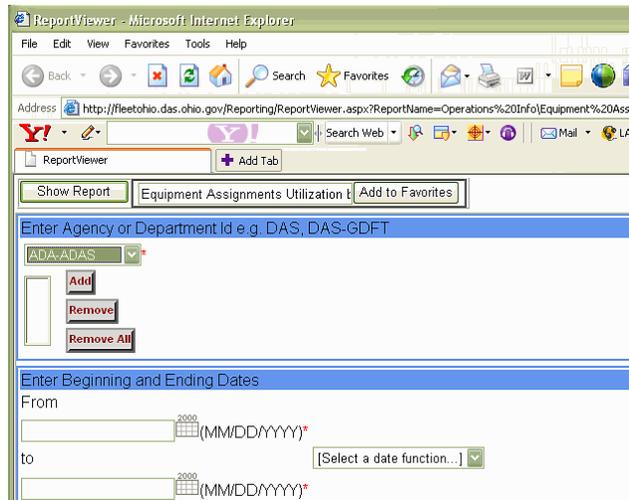
- Cost Analysis – Reports associated with fleet expenditures including fuel, maintenance, and repairs
- Equipment Info – Reports that provide inventory and utilization information
- Fuel Info – Reports relating to fuel activity
- Operations Info – Contains reports relating to motor pools, vehicle assignments etc
- Shop Operations – Contains reports related to maintenance and repairs.

Running Reports

1. Click on the category to display available reports.
2. Click on the About button to learn more about a report



3. Click on View to run a report
4. A parameter screen will be displayed to restrict the information. For each report criteria select the desired parameters and click Add.
5. Click Show Report to run.



Displayed Report

Operational Cost Analysis by Department

12/1/2006 to 4/19/2006
Agency/Department: DAS
Manufacturer: ALL Model: ALL

Equip Id	Year	Manufacturer	Model	Usage	Fuel Qty	Fuel Cost	Repair Cost	PM Cost	Total Maint Cost	MPG	Cpi CPBI	CPG	Del Date	
DAS - DRV-OFFICE OF FLEET MANAGEMENT														
6148 - MID-SIZE SEDAN														
32285	2001	TOYOTA	TAMRBD FFV	4,870	183.07	\$378.07	\$111.80	\$19.95	\$131.45	26.60	\$0.10	\$2.07	05/15/2001	
532-127	2002	TOYOTA	TAMRBD FFV	1,992	0.00	\$0.00	\$0.00	\$0.00	\$0.00	0.00	\$0.00	\$0.00	03/08/2002	
Class Totals:				2	6,862	183.07	\$378.07	\$111.80	\$131.45	26.60	\$0.10	\$2.07		
Department Totals:				2	6,862	183.07	\$378.07	\$111.80	\$131.45	26.60	\$0.10	\$2.07		
DAS-GDFT - OFFICE OF FLEET MANAGEMENT														
6148 - MID-SIZE SEDAN														
32107	2000	TOYOTA	TAMRBD FFV	4,422	162.50	\$341.80	\$190.99	\$19.95	\$210.94	27.21	\$0.12	\$2.10	03/15/2000	
32111	2001	TOYOTA	TAMRBD FFV	5,334	163.22	\$354.87	\$44.27	\$0.00	\$44.27	32.68	\$0.07	\$2.17	05/15/2001	
32143	2000	TOYOTA	TAMRBD FFV	7,464	285.22	\$887.88	\$49.80	\$39.90	\$89.40	25.17	\$0.09	\$2.06	03/15/2000	
32211	2003	TOYOTA	TAMRBD FFV	5,817	161.31	\$325.03	\$42.00	\$73.95	\$115.95	36.05	\$0.08	\$2.01	04/07/2003	
32280	2001	TOYOTA	TAMRBD FFV	5,254	206.86	\$422.60	\$84.08	\$19.95	\$104.03	25.40	\$0.10	\$2.04	05/15/2001	
Class Totals:				5	28,291	976.11	\$2,091.08	\$419.84	\$163.72	\$664.69	28.89	\$0.09	\$2.00	
6110 - MID-SIZE STATION WAGON														
32190	2001	TOYOTA	TAMRBD CW	4,274	158.03	\$337.09	\$163.60	\$0.00	\$163.60	27.05	\$0.12	\$2.13	04/27/2001	
Class Totals:				1	4,274	158.03	\$337.09	\$163.60	\$0.00	\$163.60	27.05	\$0.12	\$2.13	

Printing and Exporting Reports

The upper left corner of the displayed report has buttons that will allow you to print or export the report.



Export button – There are several export format options – PDF document, Excel, etc.

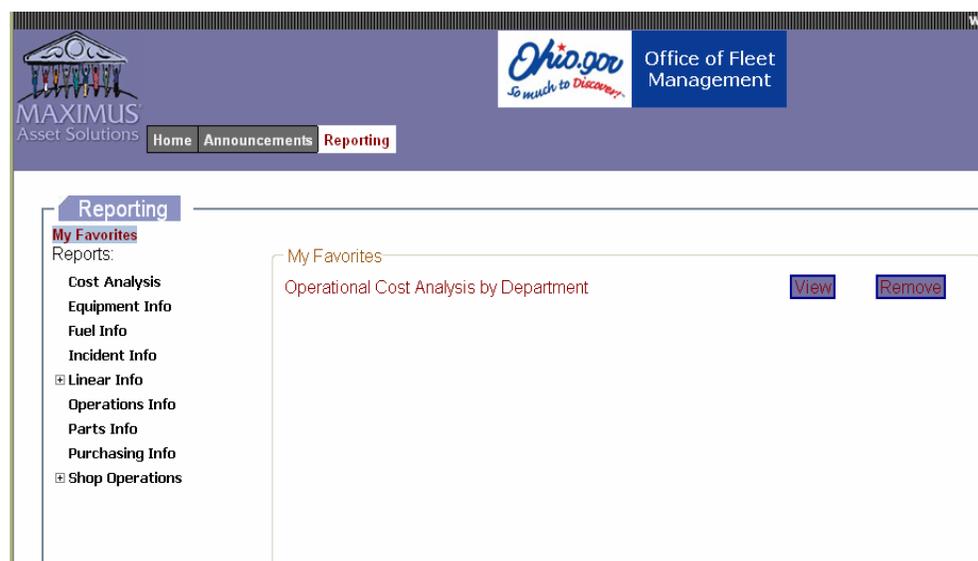
Print button – The report will be displayed as a PDF document that may be printed.

Customizing Report Access

Frequently used reports may be added to your report home page.



Click on Add to Favorites to add to the report home page.



Vehicle Assignment Application

Introduction

Agencies' long term vehicle assignments require DAS Fleet Management authorization. These should be submitted using the online Vehicle Assignment application.

This application does the following:

1. Allows agencies to submit vehicle assignments online.
2. The application updates FleetOhio as assignments are approved / terminated.
3. Provides data validation
 1. Ensures all required information is submitted.
 2. Does not allow for a vehicle or driver to have more than one active assignment.
4. Generated email notifications sent as assignments are reviewed.
5. Query / Search functionality

Because this application is integrated with FleetOhio, the following must be entered into FleetOhio **prior** to entering an assignment request.

1. The vehicle must be entered in FleetOhio – *See instructions for entering a vehicle.*
2. The Operator (driver) must be entered using the Operator Screen – *See instructions for entering a driver.*

To access the application go to <http://fleetohio.das.ohio.gov/vehicleassignment/defaultpage.aspx> or from the InfoCenter home page – Look for Quick Links.



Log in using the assigned FleetOhio USER ID and PASSWORD in UPPER CASE and click Log in

The screenshot shows the 'Login Screen' for the Ohio DAS General Services Office of Fleet Management. The page has a blue header with the logo and title. Below the header is a login form with the following elements:

- Header: Login Screen
- Instruction: Enter your user name and password, then click Login...
- User Name field: DASJANETS
- Password field: masked with dots
- Footer: Login, Quit Application, Goto GSD Home Page

Main Page

The main page displays all assignment history and has links to perform various tasks.

	Company	Equip ID	Driver ID	Driver Name	Submit Date	Status		
Edit	SOA-OH	73-101	SOA-BRANS	DON BRANSON	04/28/2004	APPROVED	Delete	Print
Edit	SOA-OH	73-103	SOA-GROOM	CHRISTOPHER GROOMS	04/28/2004	APPROVED	Delete	Print
Edit	SOA-OH	73-102	SOA-VOLLB	ED VOLLBORN	04/28/2004	APPROVED	Delete	Print
Edit	RSC-OH	16-211	RSC-BAKER	WILLIAM BAKER	09/29/2005	TERMINATED	Delete	Print
Edit	RSC-OH	16-182	RSC-BRECK	ROBERT BRECKENRIDGE	03/10/2004	TERMINATED	Delete	Print
Edit	RSC-OH	16-214	RSC-BRECK	ROBERT BRECKENRIDGE	03/09/2006	APPROVED	Delete	Print
Edit	RSC-OH	16-174	RSC-CARTW	BARBARA CARTWRIGHT	06/03/2004	TERMINATED	Delete	Print
Edit	RSC-OH	16-173	RSC-DRESS	LAURA DRESSLER	11/08/2004	TERMINATED	Delete	Print
Edit	RSC-OH	16-213	RSC-DRESS	LAURA DRESSLER	03/09/2006	APPROVED	Delete	Print

[Add New Assignment](#) [Reset Password](#) [Query Data](#) [View Commute Code](#) [Quit Application](#)

1. Click to edit an assignment.
2. Link to the New Assignment Page
3. Link to the Search existing assignments
4. Click to print an assignment

Enter a New Assignment Request

Edit	RSC-OH	16-214
Edit	RSC-OH	16-174
Edit	RSC-OH	16-173
Edit	RSC-OH	16-213

It is important to note that a driver may only be assigned to one vehicle at a time. Likewise a vehicle may not be assigned to more than one driver at one time. Should an active vehicle assignment change, first terminate the active assignment and then enter a new assignment request.

1. Click on the Add New Assignment Link on the main page

Add New Assignment **Equipment Assignment Input/Edit Screen**

Agency: Driver: Vehicle/Equipment ID:

Total Annual Miles: Annual Commute Miles:

Net Business Miles: 0 Commute Code:

Comments:

Submitter's Name: Job Title:

E-mail Address:

Search Assignments

1. Click Query Data on the main screen.
2. Use the columns to restrict data, then click Search

To obtain a report of assignments, use the FleetOhio reporting tool.

Ohio DAS
General Services
Office of Fleet Management

To **Sort** click on the column heading.

Driver ID	Driver Name	Submit Date	Status		
BRANS	DON BRANSON	04/28/2004	APPROVED	Delete	Print
GROOM	CHRISTOPHER GROOMS	04/28/2004	APPROVED	Delete	Print
VOLLB	ED VOLLBORN	04/28/2004	APPROVED	Delete	Print
BAKER	WILLIAM BAKER	09/29/2005	TERMINATED	Delete	Print
BRECK	ROBERT BRECKENRIDGE	03/10/2004	TERMINATED	Delete	Print
BRECK	ROBERT BRECKENRIDGE	03/09/2006	APPROVED	Delete	Print
CARTW	BARBARA CARTWRIGHT	06/03/2004	TERMINATED	Delete	Print
DRESS	LAURA DRESSLER	11/08/2004	TERMINATED	Delete	Print
DRESS	LAURA DRESSLER	03/09/2006	APPROVED	Delete	Print

Reset Password Query Data View Commute Code Quit Application

Ohio DAS
General Services
Office of Fleet Management

To **Sort** click on the column heading.

Agency Equip ID Operator ID Driver Name Status

Select All Select All Select All Select All Select All

Search **Cancel Search**

	Company	Equip ID	Driver ID	Driver Name	Submit Date	Status
Edit	DNR-OH	15-252	DNR-EDGA	JAMES EDGAR	12/29/2006	APPROVED
Edit	DNR-OH	15-600	DNR-BORL	MIKE A BORLAND	12/29/2006	APPROVED
Edit	DNR-OH	158-313	DNR-DAVI	DARRELL DAVIDSON	12/28/2006	APPROVED
Edit	DNR-OH	15-144	DNR-CLAR	DAVID A CLARK	07/27/2006	PENDING
Edit	RSC-OH	16-217	RSC-GEARS	JAMES GEARS	06/19/2006	APPROVED
Edit	DNR-OH	158-435	DNR-HURL	RICHARD HURLEY	04/12/2006	APPROVED
Edit	RSC-OH	16-211	RSC-KEEGA	MARY KEEGAN	04/11/2006	TERMINATED
Edit	RSC-OH	16-196	RSC-KEEGA	MARY KEEGAN	04/11/2006	APPROVED
Edit	AGR-OH	14-352	AGR-BENED	HENRY BENEDICT	03/27/2006	APPROVED

Add New Assignment Reset Password View Commute Code

Appendix A

Work Order Task Ids

Repair Task Ids

Task ID	Description	Task ID	Description
00	MISCELLANEOUS / OTHER	11	HEATING AND AIR CONDITIONING
01	TOWING SERVICES	12	MOTOR / ENGINE
02	CHANGE AND REPAIR TIRES	13	POWER TRAIN
03	SUSPENSION SYSTEM	14	IGNITION SYSTEM
04	WINDOW / GLASS - VEHICLE	15	COOLING SYSTEM
05	SOFT TRIM AND UPHOLSTERY	16	FUEL SYSTEM
06	AUTO BODY / CAB BODY	17	EMISSION SYSTEM
07	ELECTRICAL SYSTEMS	18	EXHAUST SYSTEM
08	BATTERY AND SERVICES	19	FRAME AND CHASSIS
09	LIGHTING SYSTEM	20	BRAKES / PARKING / ABS / AIR
10	INSTRUMENTS AND GAUGES	30	ACCESSORIES

Preventative Maintenance Task Ids

Task ID	Description
A	LUBE OIL AND FILTER
B	A SERVICE + COOLANT CHECK
C	A + B SERVICES + FUEL FILTER, AIR FILTER, DIFFERENTIAL LUBRICANT

Appendix B

Commute Codes

- **N/A** – Assigned vehicle not used for commute purposes and is parked on state property during non-business hours. The mileage exceeds the break-even.
- **HBE** – Employee’s home is his/her headquarters and does not commute. The mileage exceeds the break-even.
- **HSE** – Employee’s home is his/her headquarters and does not commute. The assigned vehicle has specialty equipment that would not be practical to install on a personal vehicle. The mileage does not exceed the break-even.
- **BE** – Employee has a designated headquarters and the vehicle is used for commute purposes. The net business mileage exceeds the break-even.
- **BOC** – Employee has a designated headquarters and the vehicle is used for commute purposes. The employee is on-call 24/7 to meet non-business hours emergencies for a significant portion of the state. The vehicle is used for commuting. On-call status must be designated by the appointing authority, supported by duties in the employee’s position description, and must occur with such frequency to merit commuting. A pool vehicle is either unavailable or securing the use of a pool vehicle would be impractical.
- **OTH** – Other. A written explanation is required and can be included in the Comments section.

CODE	COMMUTE	BREAK-EVEN	HOME BASED	ON CALL	SPEC EQUIP
N/A	N	Y			
HBE	N	Y	Y		
HSE	N	N	Y		Y
BE	Y	Y			
BOC	Y	N		Y	
OTH					