

A photograph of a parking lot filled with a row of cars, likely a fleet, parked in front of a large, multi-story building. The scene is outdoors with several tall evergreen trees in the background. The image is semi-transparent, allowing the text to be overlaid clearly.

Testing the Web-Based Version of FleetOhio

**A Tutorial in the Use and Test
Plan of the New Web-Based
Fleet Management System**

- **Today's Objective** — *Why are we here today?*
- **What's New** — *What should I expect?*
- **FleetOhio Access** — *How do I access the upgrade?*
- **The Web-Based System** — *What do I do with it once I have it?*
- **The Test Plan** — *What is expected of me?*
- **Questions**

Today's Objective

Our focus for today is to prepare you for your role in testing the web version of FleetOhio. As a user of FleetOhio, you have been selected to assist with testing the upgrade by performing the same day to day operations that you normally perform in the current version. To prepare you for this testing today we will cover:

- 1) What new things can you expect to find with the upgrade.
- 2) How to access the new environment.
- 3) How to complete the Testing Process.

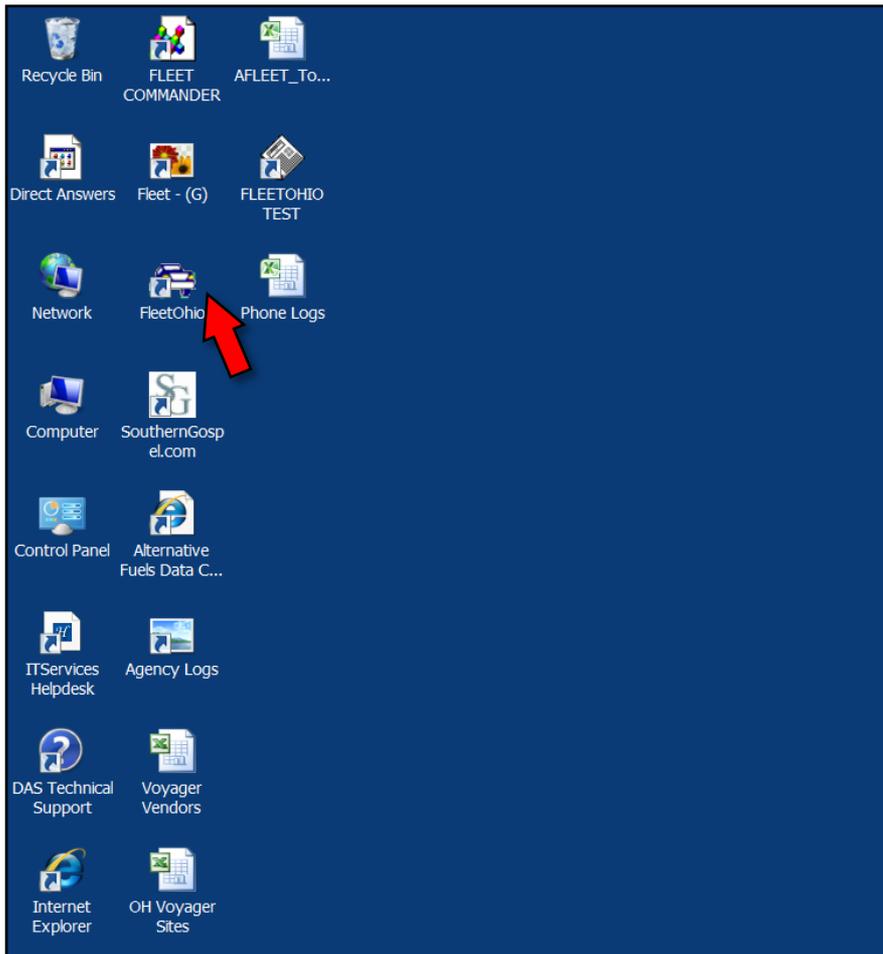
Please be aware that while we will be showing you how to access the new FleetOhio system today, the primary purpose of today's meeting is to give you the necessary understanding to perform testing on the new web-based FleetOhio. Your input into this process is very important. You will be testing application functionality, connectivity, and providing us with insight into information that needs to be included in training of other users prior to the upgrade being rolled out for general usage. You are being asked to perform a very important role that will impact yourself and other users in the future.

What's New

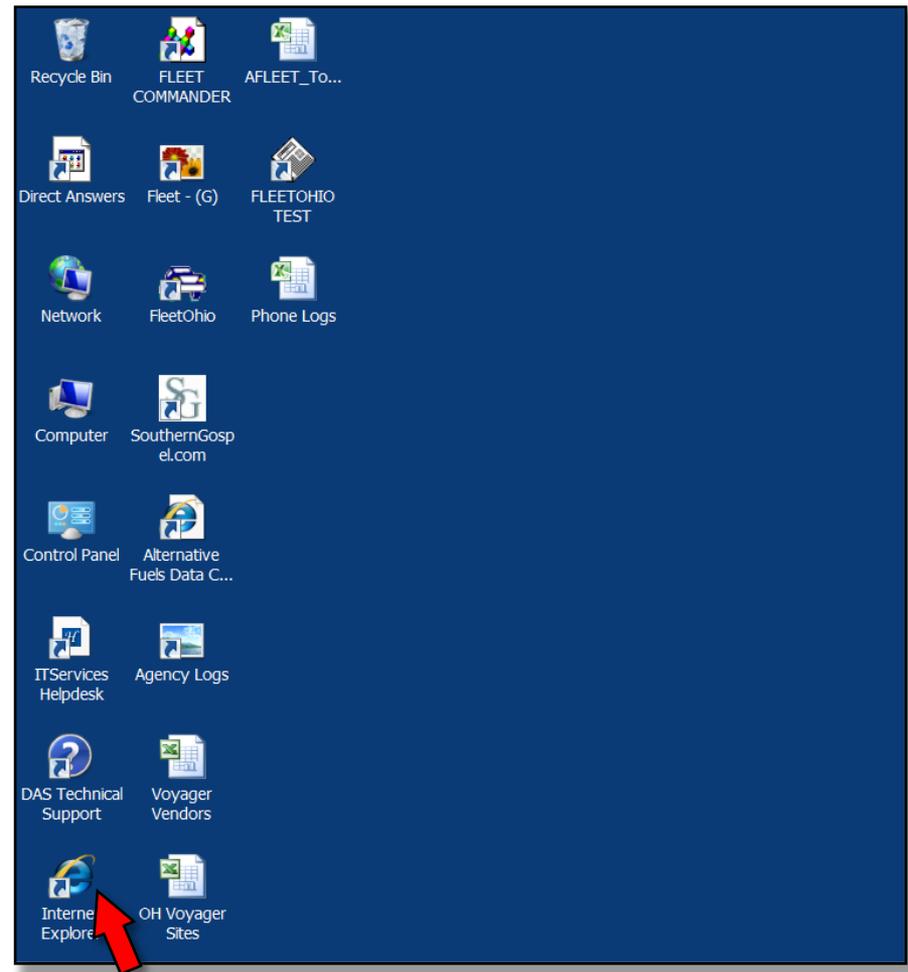
- 1) Web-Based:** The primary change is in the ease of use with the browser-based interface. The web version of FleetOhio is similar to visiting any web page on the internet.
- 2) More Defined User Roles:** While user access has always been defined by the role the user is expected to perform (*i.e. Data Entry, Dispatcher, Managerial*) the access rights are being redefined and improved. Expanded location access will occur for certain roles and a more consistent approach to role application will occur across the state which will minimize setup and administrative time.
- 3) Faster Upgrades:** With the web-based version of FleetOhio your local IT will not have to come to your desk and install a piece of software. When future upgrades to the system occur, no changes need occur on your desktop.
- 4) Customized Access:** Pending improvements will simplify what you see on the screen. Your menu choices will be reduced to only the screens you have access to which will result in ease of use and faster access times.
- 5) Non-Operating System Dependent:** The web-based version of FleetOhio is not dependent on the operating system on your computer. As long as you can access the internet, you will be able to access FleetOhio.

The first major change of the new web-based FleetOhio is that you never use the short cut on your desktop again (*after Go-Live*). From this point forward to access the upgraded FleetOhio you will go to a specific website using your web browser (Internet Explorer).

Current Access



Upgrade Access



You can create a short cut or save the site as a favorite just as you would any other web site. The address for the web site for the testing is shown below.

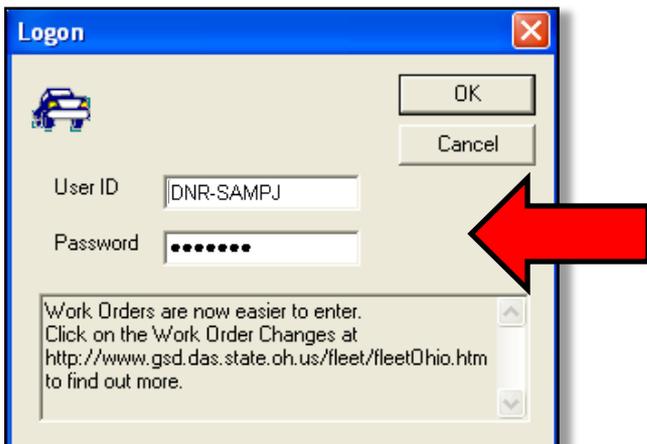
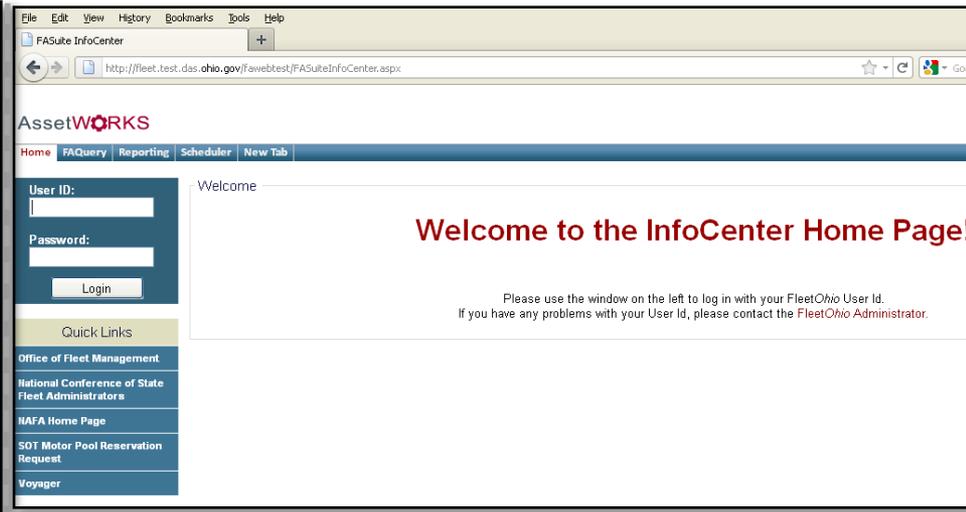
<http://fleet.test.das.ohio.gov/fawebtest/FASuiteInfoCenter.aspx>

The screenshot displays the Ohio DAS website interface. At the top, the browser address bar shows the URL: <http://fleet.test.das.ohio.gov/fawebtest/FASuiteInfoCenter.aspx>. The website header includes the text "Serving GSD Employees" and a search bar. Below the header, there are two images: one of a modern building exterior and another of an interior lounge area. A navigation menu on the right lists: Home, Public Servant, GSD Newsweek, and Sitemap. The date "Monday, March 17, 2014" is displayed. A large central image shows a building with various service categories overlaid: Properties & Facilities, Construction, Insurance, Procurement, Fleet, and Printing. On the left, a vertical menu titled "OhioLink" lists: Calendars, Conference Rooms, Directories, ePay, Forms, Learning Resources, News/Publications, Policies/Directives, Safety/Health, Service Requests, Sitemap, and Useful Links. The footer contains "State Home | DAS Home | GSD Home" and a "Login" link.

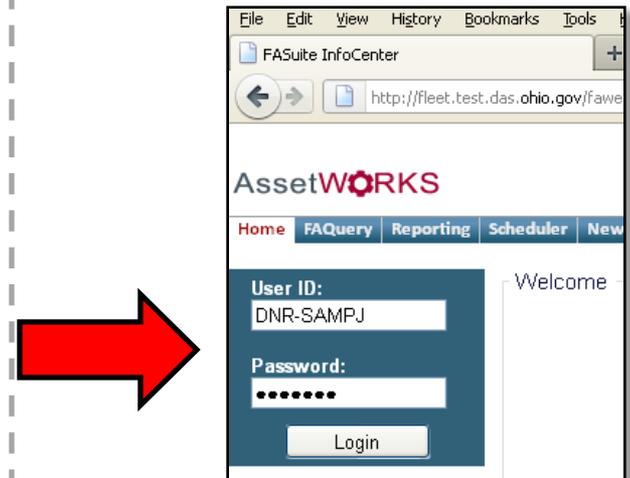
The web page is the same Infocenter web page you are used to going to for reporting.

Current Access

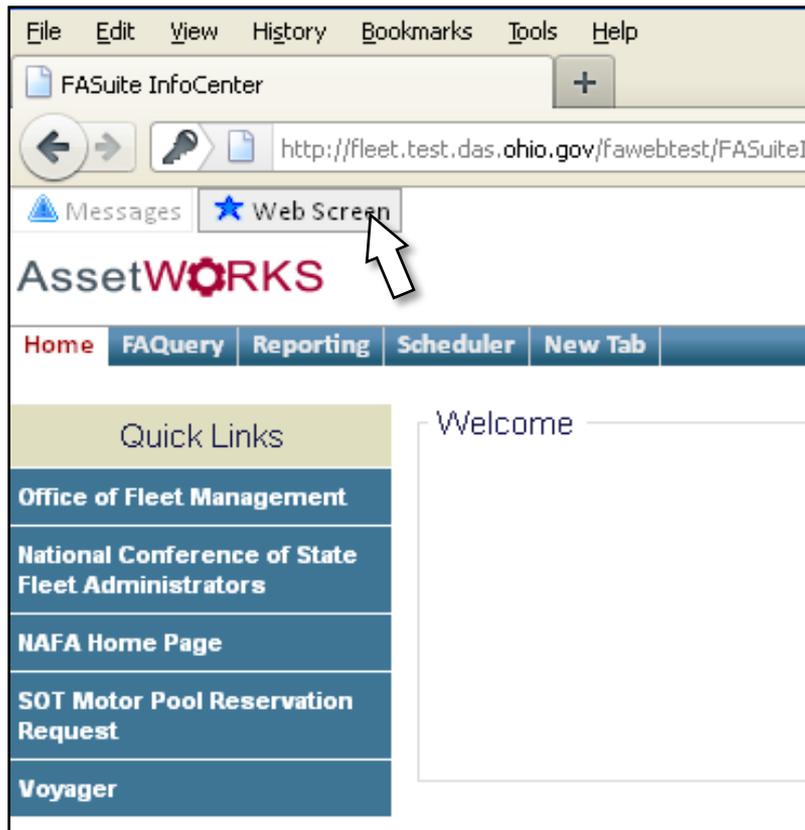
Upgrade Access



You will have to sign in using your User ID and Password. These are the same User ID and Password you have always used to sign in to FleetOhio and Infocenter. No change here.



Once you have signed in, two new links will appear on your screen in the upper left hand corner. These are new and one of them is the key to using the new system.



Using your mouse pointer, select the link for the **Web Screen**. This will open a new **Menu** screen over the existing Infocenter screen.

That's all there is to accessing the new system. You are now in and ready to learn how to use it.

The Web-Based System

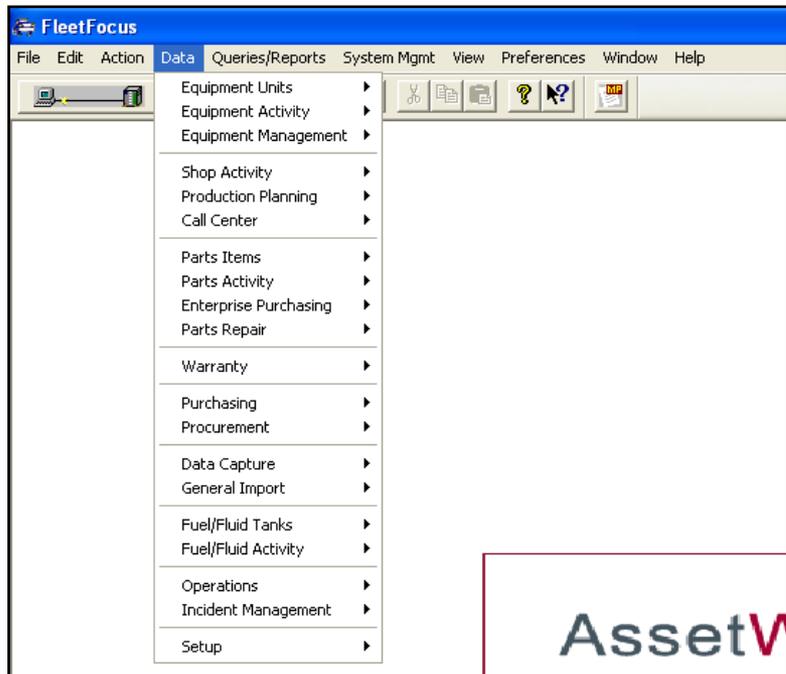
This section will go through and identify the basic elements of navigating and using the new FleetOhio upgrade. You will find that while the initial appearance of the system is dramatically different, the functionality and where you find data has changed very little.

We will start with the first thing that comes up when you enter the upgraded version, the menu screen, known as the **ENTERPRISE PORTAL**.

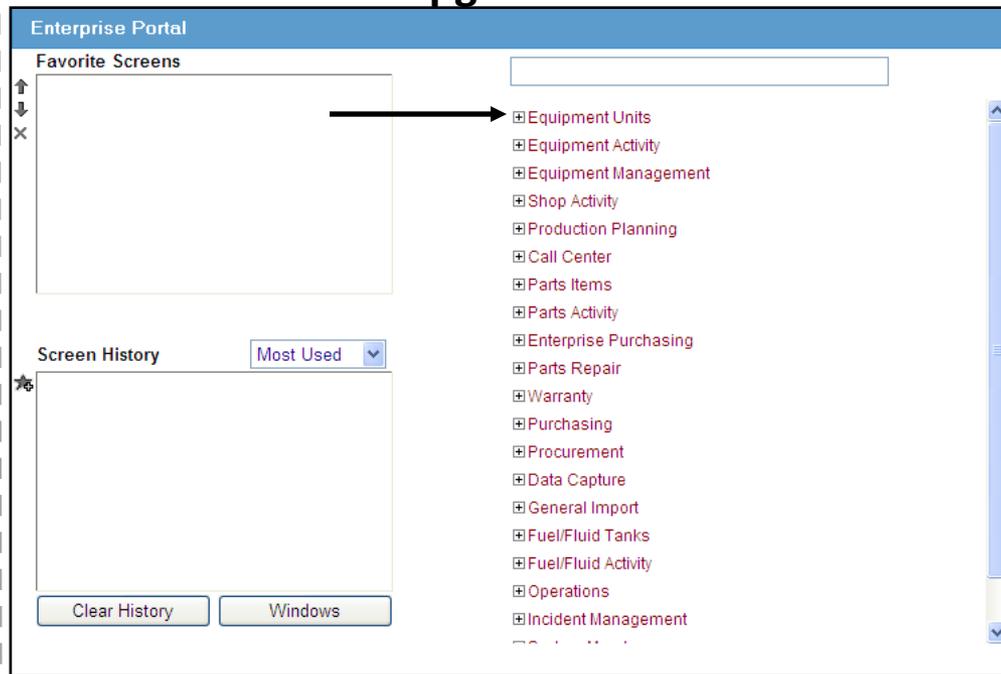


This menu looks a little different in appearance but it is functionally the same as the old Menu selections across the top of the FleetOhio Screen.

Current Access



Upgrade Access

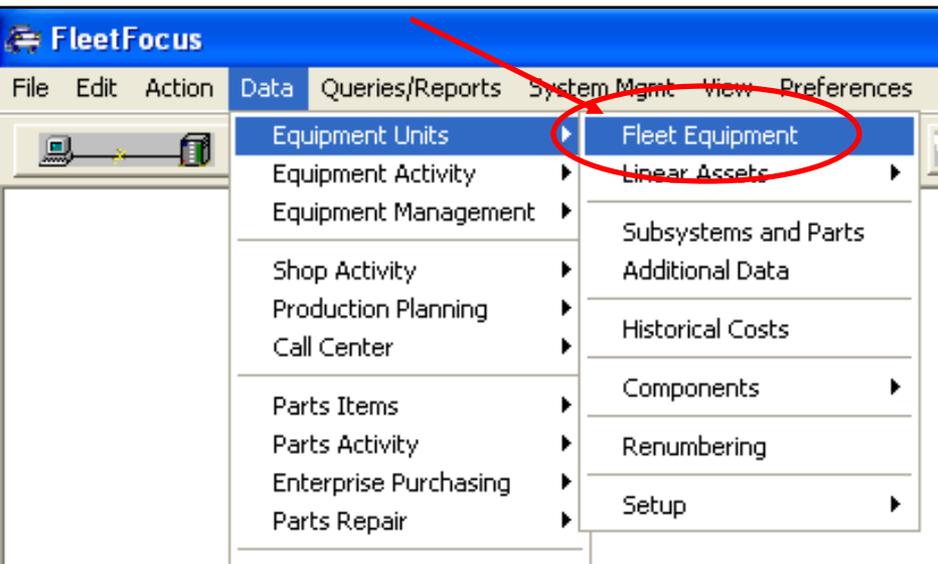


The majority of the activity you performed existed under the menu selection **DATA**. Instead of looking for **DATA** first however, you will start by looking for the menu choices you would select below **DATA**.

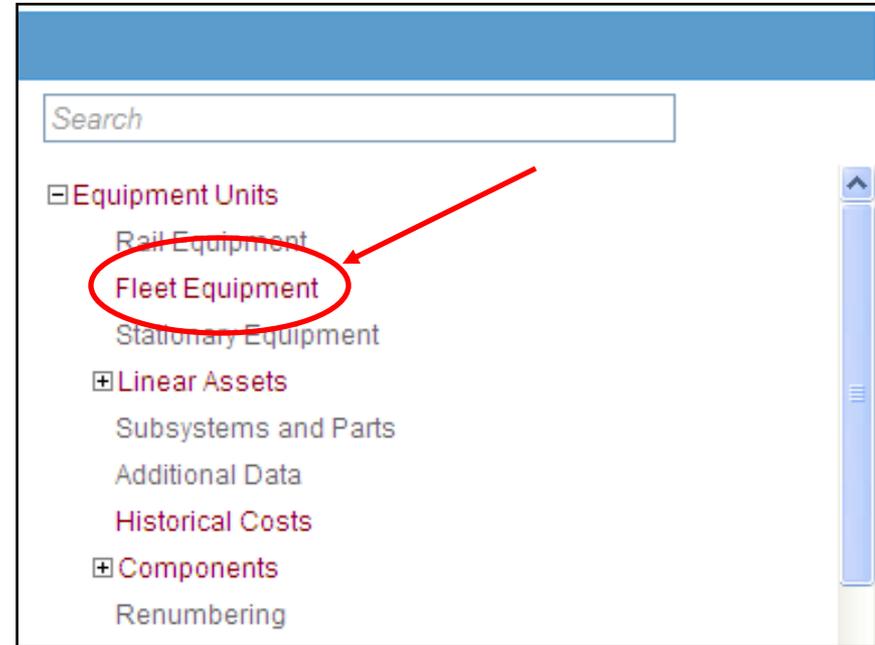
So if you wanted to open the Equipment Screen to look at a vehicle you would use your mouse pointer to click on the “+” sign in front of the menu selection you want to see to expand your choices.

If you expand the **Equipment Units** choice you will see the sub menus below it. As you can see, just like in the current version of FleetOhio, menu choices that you do not have access to are greyed out as unavailable for selection. You will find the **Fleet Equipment** screen listed under **Equipment Units**, exactly where it appeared in the menu choices in the current version of FleetOhio.

Current Access

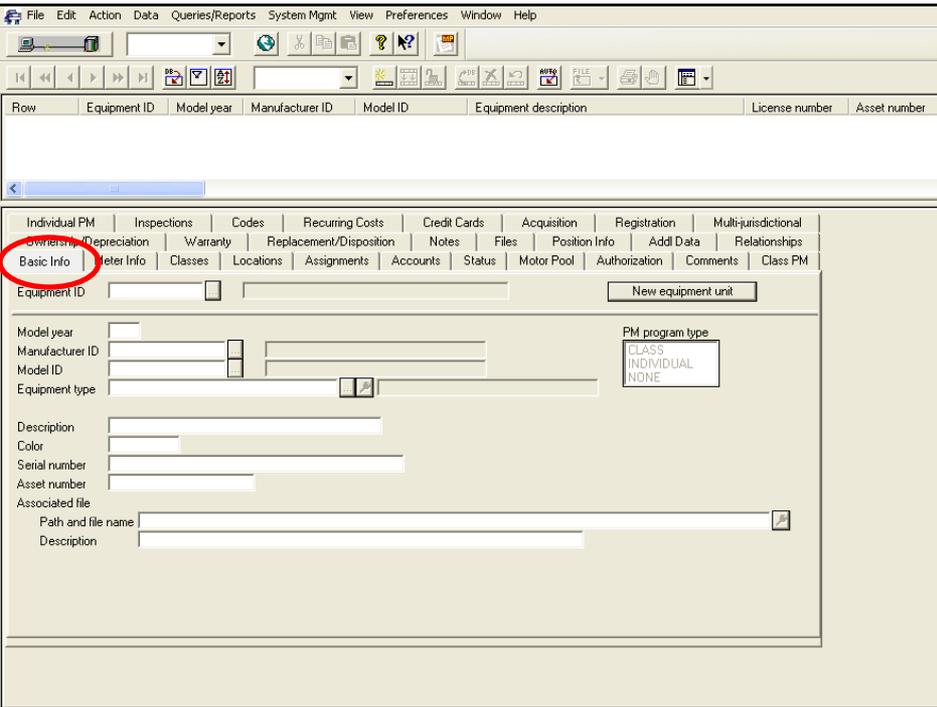


Upgrade Access



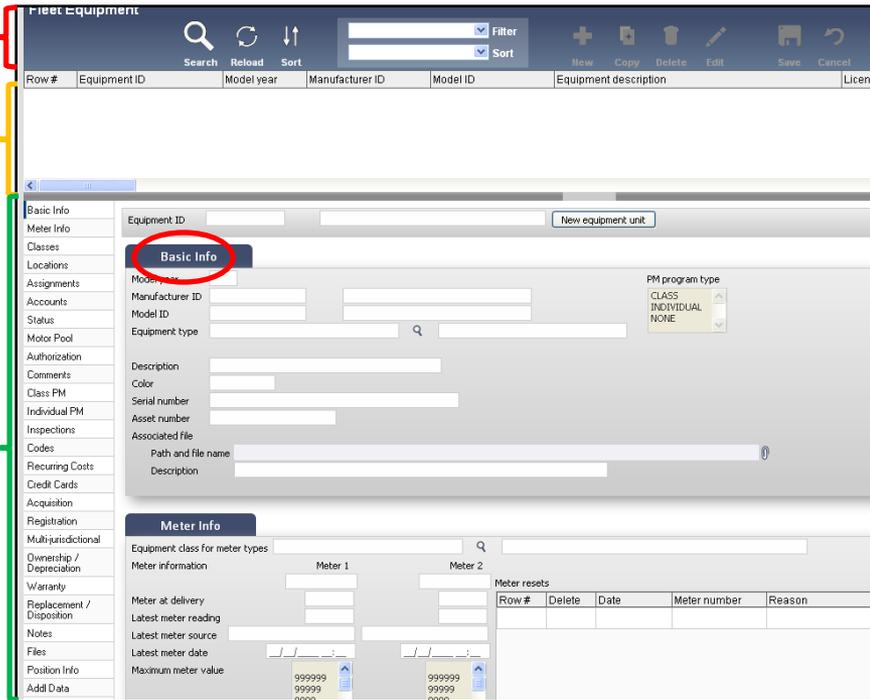
Double click on the **Fleet Equipment** name to open that screen.

CONTROL BUTTONS



G
R
I
D

T
A
B
S



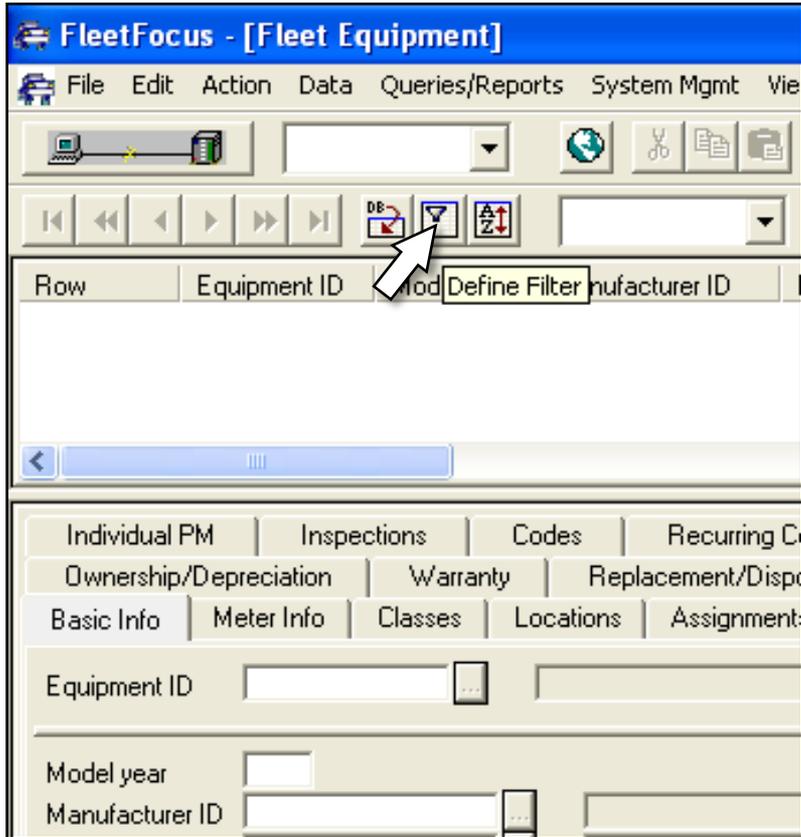
The biggest change you will notice on the screens is that the tabs at the bottom of the screen do not overlap any more. There are all still there, they are just placed one below the next moving down the screen. What fields are on which tab has not changed (*i.e. Model Year is still on the Basic Tab*), only the layout of the tabs themselves have altered.

Tab
Quick
Links

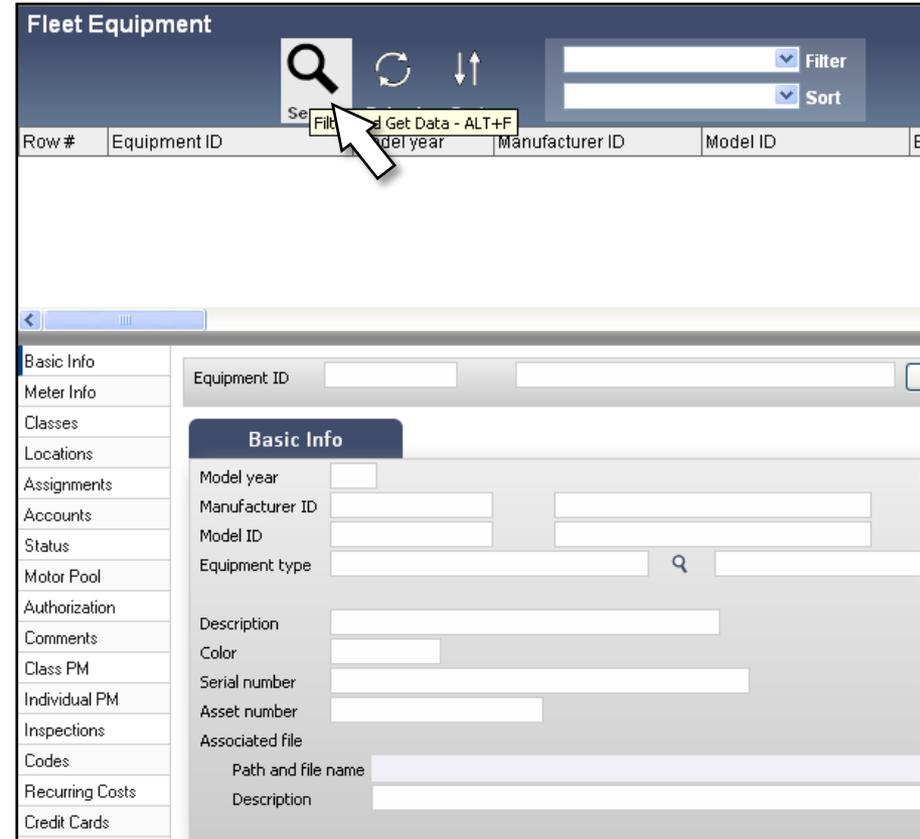
Scroll
Bar

Note: You may use the scroll bar on the right of the screen or the quick links on the left of the screen to go to a specific tab for view or data entry.

Current Access



Upgrade Access



To call up a record in the current version of FleetOhio you would select **DEFINE FILTER** and it would bring up a selection of fields to choose from for data entry. You would then **GET DATA** to retrieve the records. Now if you select **SEARCH** you get the same field choices that you got before using **DEFINE FILTER**.

Current Access

Filter

Get Data Close Clear Cancel

Equipment ID
Model year
Manufacturer ID
Model ID
Equipment type
Color
Serial number
Asset number
Meter types class
Maximum meter 1 value

Maintenance class
PM program class
Rental rates class
Asset category ID
Stored location ID
Assigned PM location ID
Assigned repair location ID
Station location ID
Access rights location ID
Vehicle location

Upgrade Access

Filter

Current filter choices

Equipment ID
Model year
Manufacturer ID
Model ID
Equipment type
Color
Serial number
Asset number
Meter types class
Maximum meter 1 value
Maintenance class
PM program class
Rental rates class
Asset category ID

Named Filters

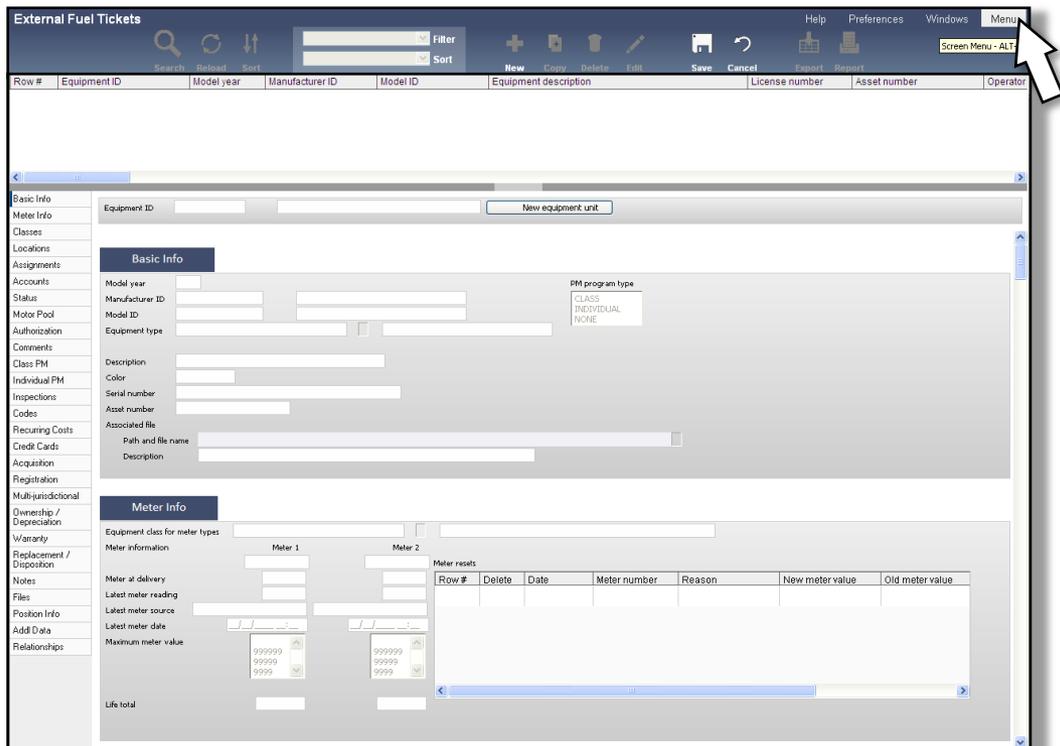
Delete Selected Filter

Is Default Filter

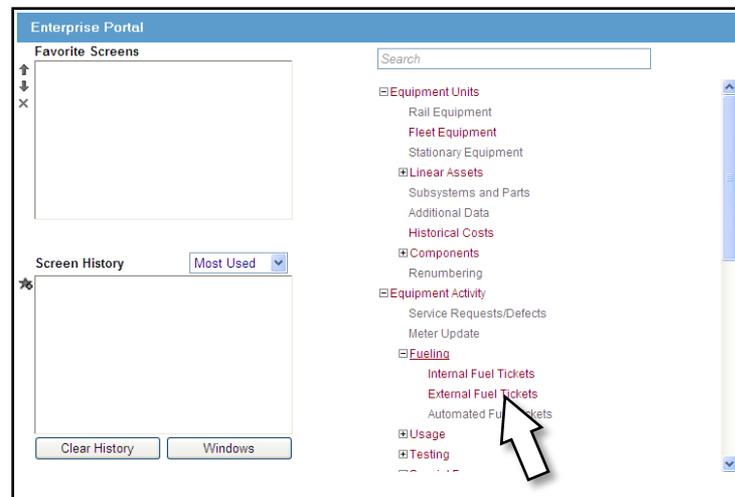
Save As

Cancel Clear Filter Apply Filter

As you can see from the example above, the menu under **SEARCH** looks just like the menu under **DEFINE FILTER** from the current version. In fact both are still called Filter. To retrieve a record(s) you enter data into the fields you which to filter by and then select the **Apply Filter** button. All records matching the criteria you entered in the **SEARCH** menu will appear in the Grid and the highlighted record in the Grid will display data in the tabs below just like you are used in the current version of FleetOhio.



Now that you have finished reviewing the vehicle records, let's look at the **External Fuel Screen**. To do that you need to return to the original **Menu** selection window. To recall the **Menu** window you simply use the mouse pointer and click on the **MENU** choice in the upper right hand corner of the screen.



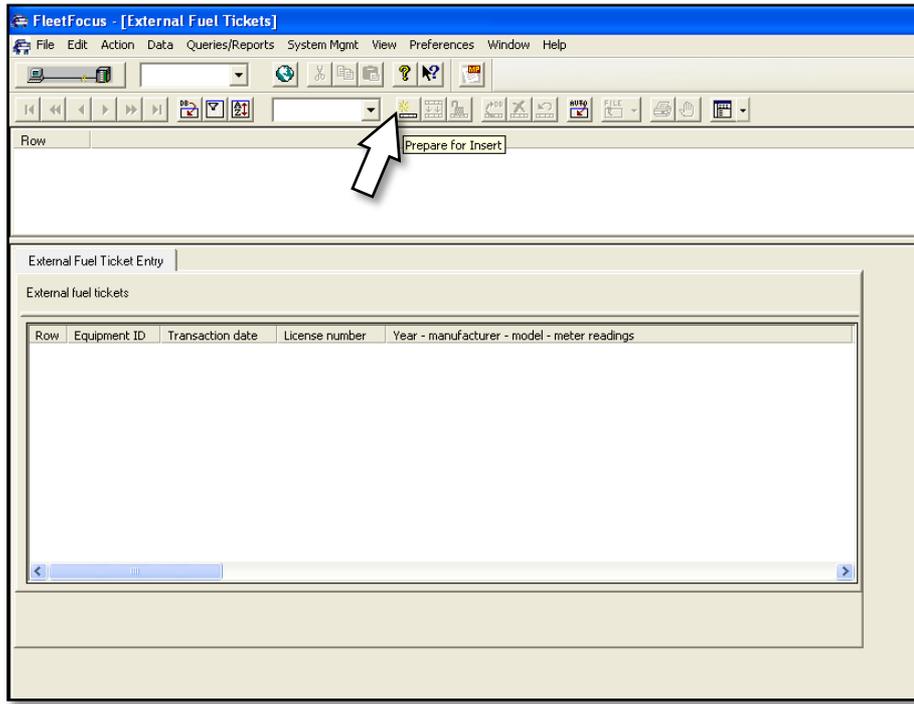
Once you are looking at the **Menu** screen select the **External Fuel Tickets** option under **Equipment Activity** and **Fueling** by double clicking on the name.

Lets enter a new fuel transaction.

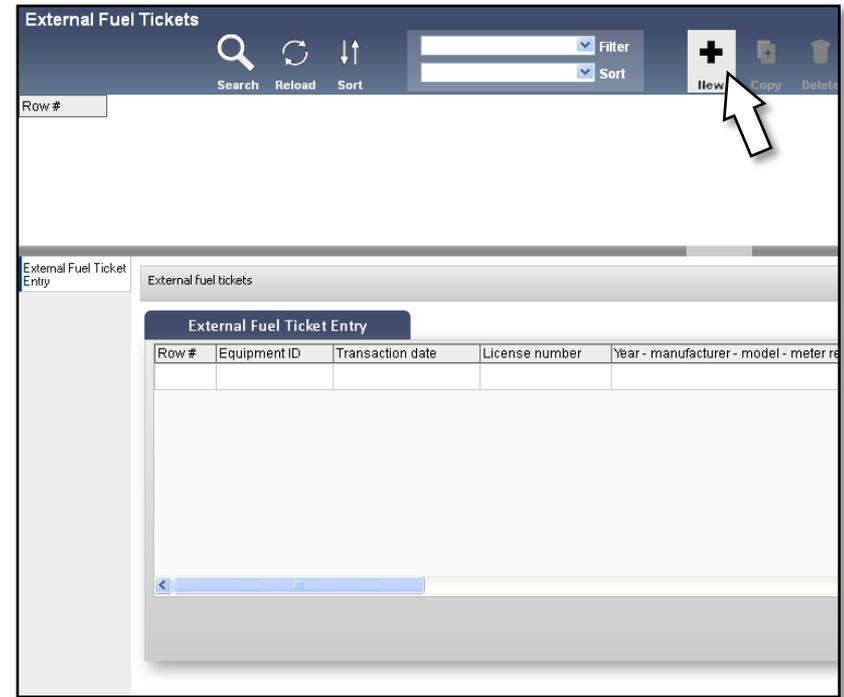
In the old system you would select the **Prepare To Insert** button to create a new record.

Now you will use the mouse to select **NEW** to create a new record.

Current Access

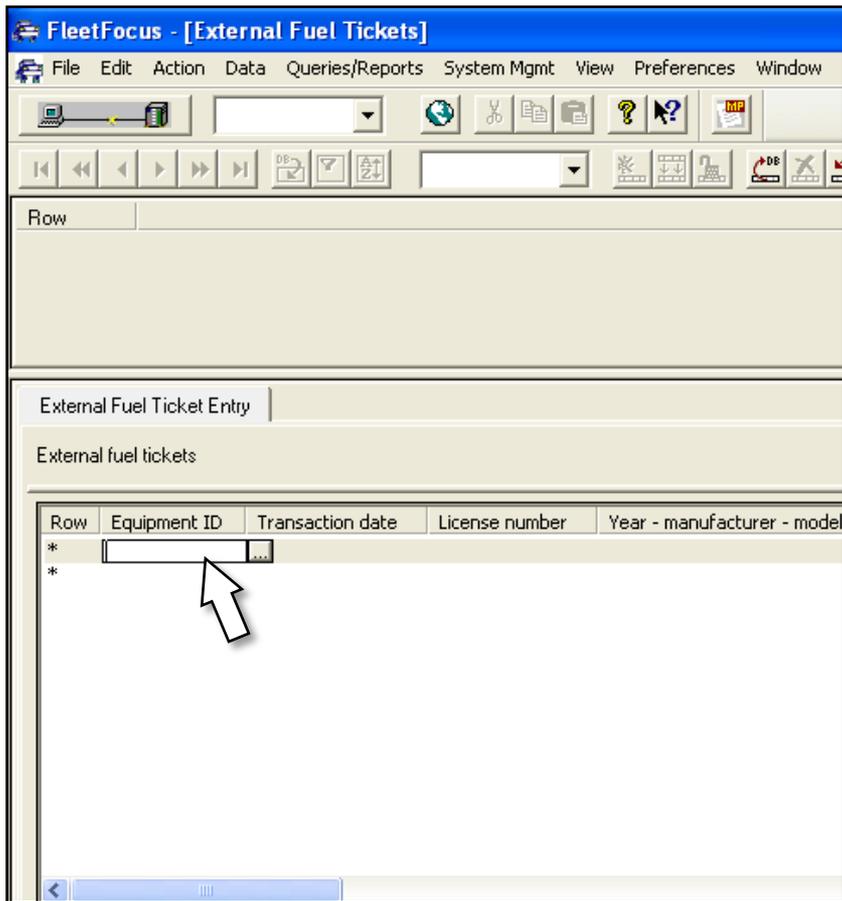


Upgrade Access

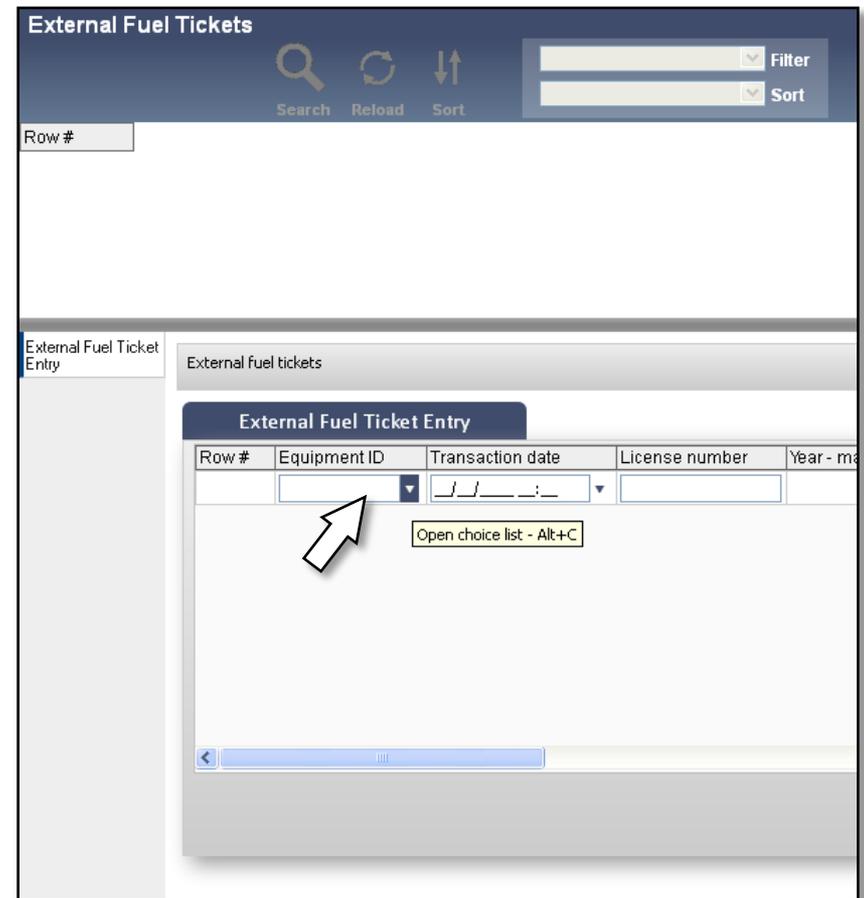


Once a new record is created, entering the data uses the same procedure you performed in the old version. Move down with your mouse and select the **Equipment ID** field and you will be able to enter data directly.

Current Access



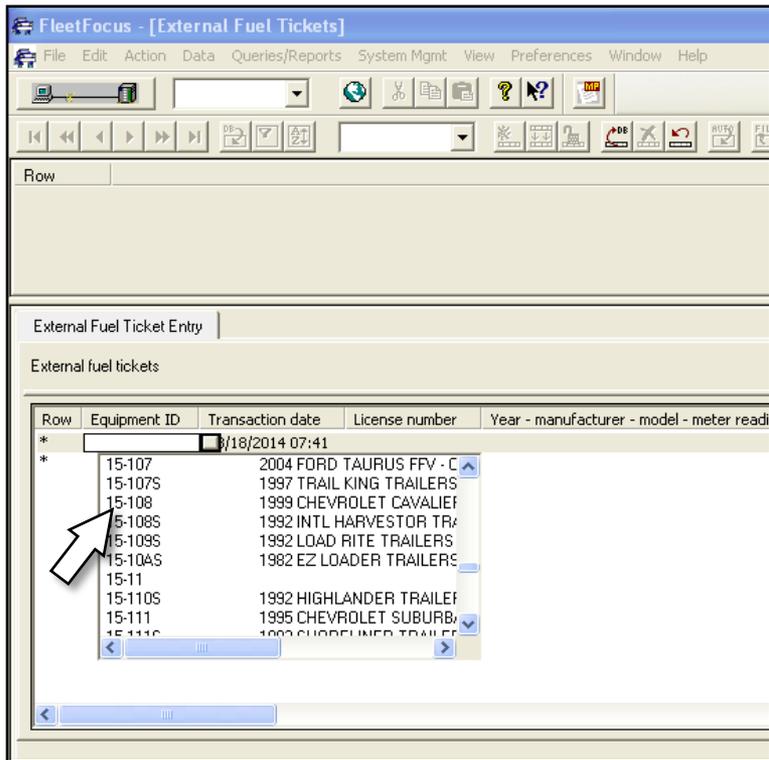
Upgrade Access



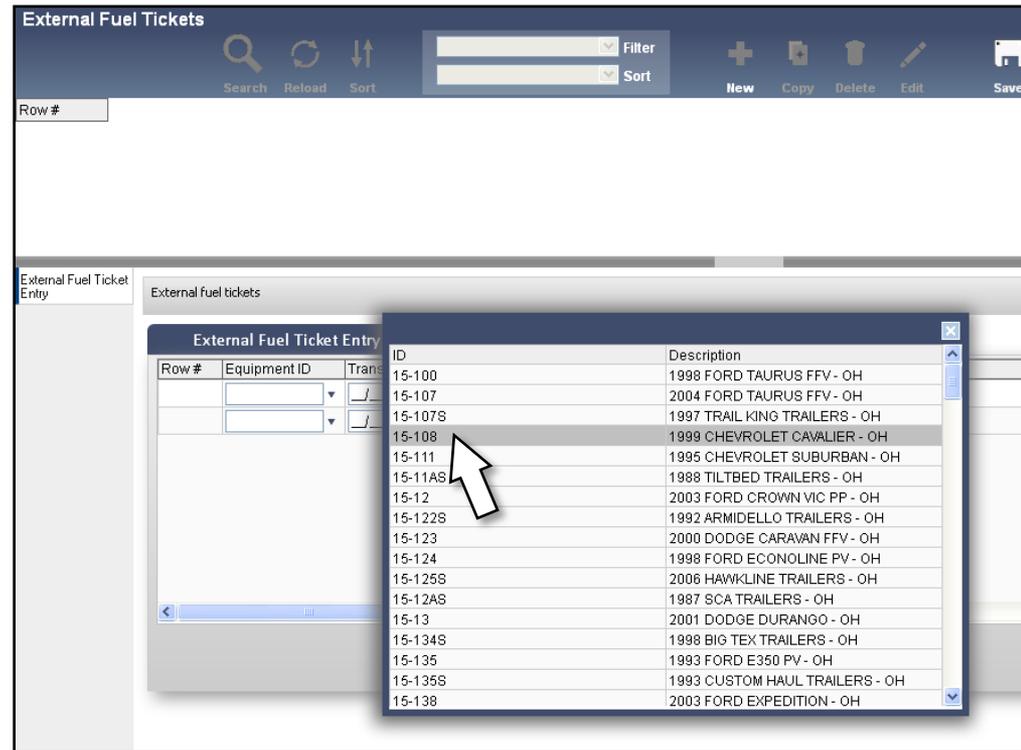
A small down arrow appears beside many of the entry fields. Clicking on this arrow will provide an **Open Choice** list that allows you to choose from selections appropriate to this field. In the current version the **Open Choice** list button had three dots on it but it performed the exact same function.

You may use your mouse pointer to select an option from the **Open Choice** list by double clicking on that selection.

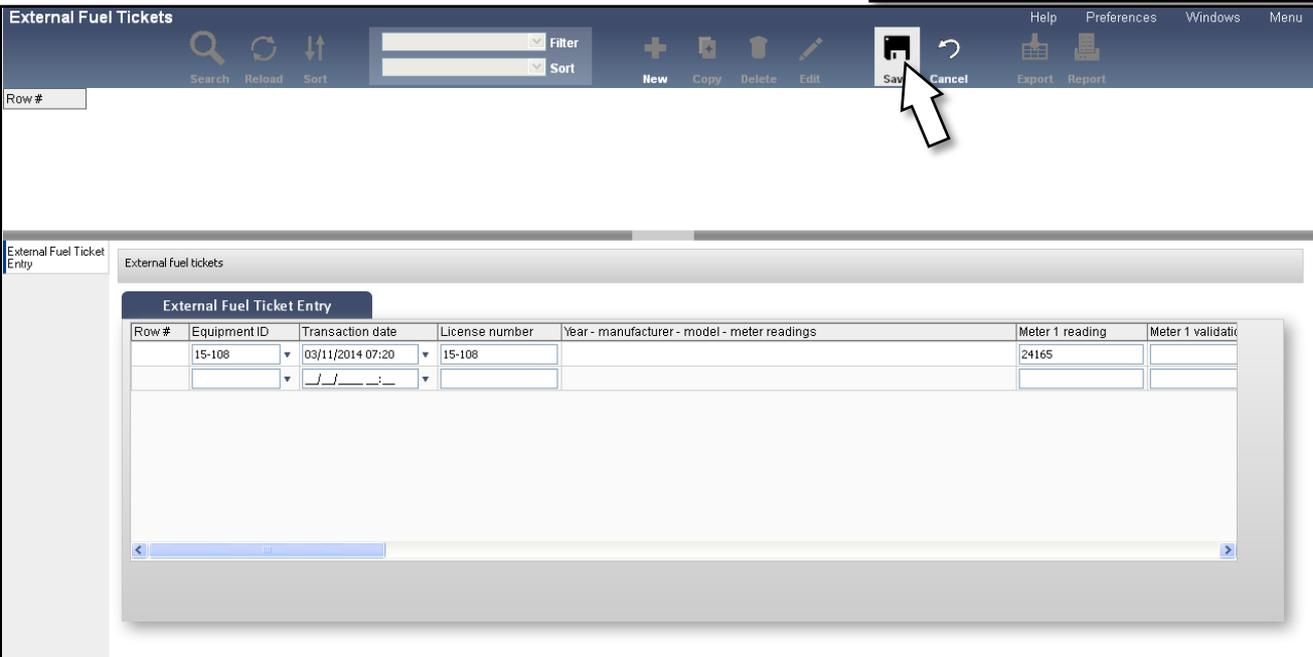
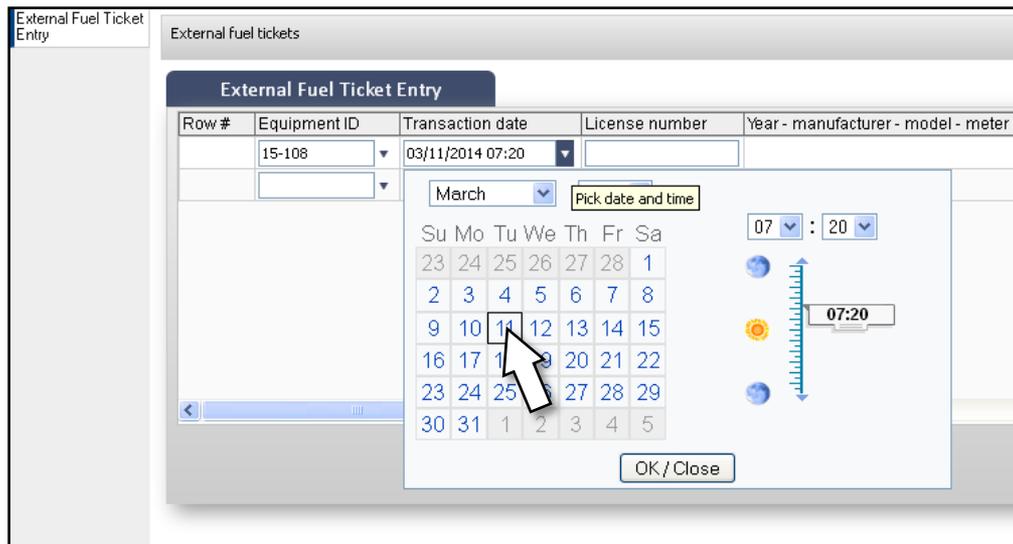
Current Access



Upgrade Access



A new feature in this upgrade provides a calendar view any time you select the down arrow beside a date field. This provides you with another format to enter your date and time information. However, you may still type in the data directly into the field as you previously did if you so choose.



Once you have entered all the data for this record, go to the top of the screen and select the **SAVE** button just as you used to select the **Process**  button in the current version. The same rules of error checking exist for the **SAVE** button.

External Fuel Tickets

Search Reload Sort Filter Sort New Copy Delete Edit Save Cancel Export Report Help Preferences Windows **Menu** Screen Menu - ALT+

Row#

External Fuel Ticket Entry

External fuel tickets

External Fuel Ticket Entry

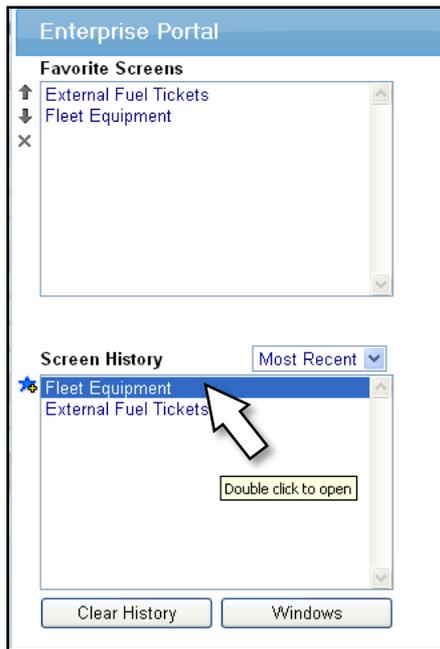
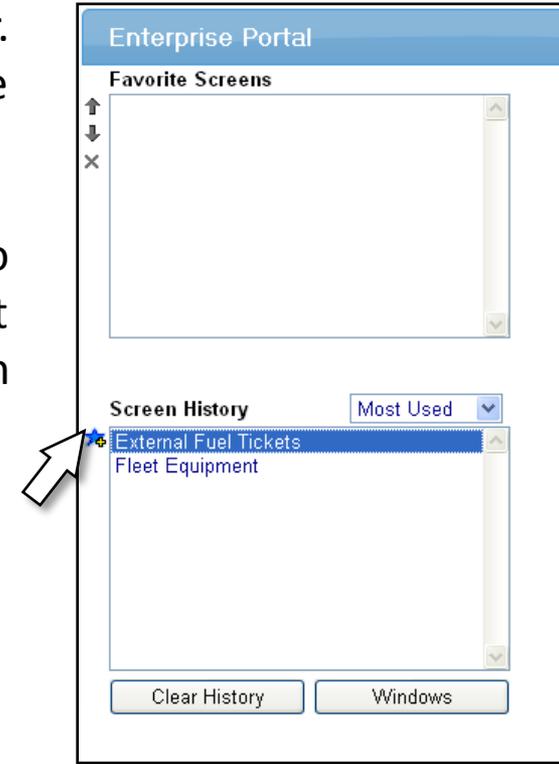
Row#	Equipment ID	Transaction date	License number	Year - manufacturer - model - meter readings	Meter 1 reading	Meter 1 validation
	15-508	03/11/2014 07:45	15-508			
	15-508	__/__/__				

Now that you have finished entering the fuel transaction, return to the main menu by selecting the **MENU** button at the top of the page.

The screenshot displays the 'Fleet Equipment' web application. At the top, there is a navigation bar with 'Search', 'Reload', and 'Sort' options, along with a 'Filter' and 'Sort' dropdown menu. Below this is a table with columns: Row #, Equipment ID, Model year, Manufacturer ID, Model ID, Equipment description, License number, Asset number, and Operator ID. A modal window titled 'Enterprise Portal' is overlaid on the table. It contains two main sections: 'Favorite Screens' and 'Screen History'. The 'Screen History' section has a dropdown menu currently set to 'Most Used', which is circled in red. Below the 'Screen History' list are two buttons: 'Clear History' and 'Windows'. A white arrow points to the 'Clear History' button. The background of the modal window shows a search bar and a list of menu items including Equipment Units, Equipment Activity, Equipment Management, Shop Activity, Production Planning, Call Center, Parts Items, Parts Activity, Enterprise Purchasing, Parts Repair, Warranty, Purchasing, Procurement, Data Capture, General Import, Fuel/Fluid Tanks, Fuel/Fluid Activity, Operations, and Incident Management.

Please note that each time you go to a screen during any particular session of FleetOhio usage, the screen name is recorded under **Screen History** on the **Menu** screen. This list can be sorted by *Most Recent* or by *Most Used*. You can also choose to clear this history by selecting the **Clear History** button. Once you have visited a screen, you may move it from the **Screen History** box up to the **Favorite Screens** box so that it is always available for quick selection rather than maneuvering through the menu options each time you need to go to a screen.

Beside the first screen name in the **Screen History** box is a blue star. By selecting this star the first screen name will be transferred to the **Favorite Screens** box above. Only the screen beside the star can be selected for a favorite. You can manipulate the list by changing the order under *Most Used/Most Recent* or you can **Clear History**, go to the screen you want to favorite, then come back to the menu and it will be the top choice so you can favorite it. Once a screen has been selected as a favorite it will remain on that list until you delete it using the “X” option beside that box.



Once a screen appears on either the **Favorite Screens** list or the **Screen History** list you may easily go to that screen by double clicking on the screen name in the list.

The Test Plan

In this section of today's presentation we will introduce you to the Test Plan as well as explain what you need to do with it as a tool to direct your testing.

We will also provide you with information regarding testing timelines and how you respond with the completed testing paperwork.



The Test Plan

The **Test Plan** is the tool we use to direct our testing and ensure that every aspect of the system functionality has been tested. The Test Plan (*shown in part to the right*) is a list of functions that need to be performed in FleetOhio to make sure everything is working correctly. The sheet shows each type of system test (*from entering a new fuel ticket to entering a new vehicle*), a check mark for who should be able to perform the test (*user role*) a check box to show if you tested this particular system test and a space reserved to noting difficulties, success or any issues you may have encountered.

Type of System Test	Managerial	Data Entry	Dispatcher	Performed		Difficulties/Issues/Observations
				Yes	No	
Fleet Equipment						
Add a new Vehicle	✓			<input type="checkbox"/>	<input type="checkbox"/>	
Check the Mileage on a Vehicle	✓	✓	✓	<input type="checkbox"/>	<input type="checkbox"/>	
Change the Location Assignment on a Vehicle	✓			<input type="checkbox"/>	<input type="checkbox"/>	
Validate the Location Assignment of a Vehicle	✓	✓		<input type="checkbox"/>	<input type="checkbox"/>	
Place a Vehicle in a Motor Pool	✓		✓	<input type="checkbox"/>	<input type="checkbox"/>	
Assign an Operator	✓			<input type="checkbox"/>	<input type="checkbox"/>	
Change the Status of a Vehicle	✓			<input type="checkbox"/>	<input type="checkbox"/>	
Enter the Funding Source of a Vehicle	✓			<input type="checkbox"/>	<input type="checkbox"/>	
Enter the Cost Center (Authority) of a Vehicle	✓			<input type="checkbox"/>	<input type="checkbox"/>	
Enter a Comment related to a Vehicle	✓		✓	<input type="checkbox"/>	<input type="checkbox"/>	
Validate the type and amount of fuel that a Vehicle has	✓	✓	✓	<input type="checkbox"/>	<input type="checkbox"/>	
Operators - Primary Information						
Add a New Operator	✓			<input type="checkbox"/>	<input type="checkbox"/>	
Meter Readings - Assignments - Usage						
Correct an Inaccurate Meter Reading	✓	✓	✓	<input type="checkbox"/>	<input type="checkbox"/>	
External Fuel Tickets						
Enter an External Fuel Ticket	✓	✓		<input type="checkbox"/>	<input type="checkbox"/>	
Reverse an External Fuel Ticket	✓	✓		<input type="checkbox"/>	<input type="checkbox"/>	
Internal Fuel Tickets (if agency has internal tanks)						
Enter an Internal Fuel Ticket	✓	✓		<input type="checkbox"/>	<input type="checkbox"/>	
Reverse an Internal Fuel Ticket	✓	✓		<input type="checkbox"/>	<input type="checkbox"/>	
Work Order - Short Form						
Enter a Work Order	✓	✓		<input type="checkbox"/>	<input type="checkbox"/>	
Reverse an Entry on a Work Order	✓	✓		<input type="checkbox"/>	<input type="checkbox"/>	
Change the Task Code on a closed Work Order	✓	✓		<input type="checkbox"/>	<input type="checkbox"/>	
Historical Costs Screen						
Validate Historical Costs on a Vehicle	✓	✓	✓	<input type="checkbox"/>	<input type="checkbox"/>	
Motor Pool Center (if agency has a motorpool)						

The Test Plan

Please complete all tests notated for your role. Since functionality of the new version works the same as the old version you should be able to perform all functions that you previously could perform (*i.e. enter a vehicle, enter a fuel ticket, etc.*).

If you find that some function you normally perform is not listed on the Test Plan please perform the test anyway and add the line and necessary columns to the sheet so you can reflect those results on the plan.

If you find yourself at an impasse (*unable to enter into FleetOhio or can not enter any new files at all*), please do not wait until the end of the test period to report the issue. We only have one test period scheduled and as such each individual needs to make the most use of the system in the allotted time. Don't hesitate to contact Roger Bechtel directly by e-mail, with any issues that have stopped your testing.

Each of you will receive a copy, via email, of the test script to be completed. **Please return your completed test script by no later than end of business on April 2nd.** To return it, just rename the file name to **XXX_testplan_AA**, where "XXX" equals your agency code (*DPS/EPA/BWC*) and "AA" equals your initials. Make the subject of the e-mail "Test Plan".

The **April 2nd** deadline only gives you a week and a half of testing time and while we do not envision it taking more than a few hours out of your day to complete the Test Plan, please do not wait until the deadline to begin your testing. We need to have time to correct any issues that may occur and still give you enough time to complete the process.

This completes the introductory tutorial on using the new Web-Based FleetOhio and how to perform the system testing we are asking you to complete. We hope that you have learned that while the new system has changed its looks, that its functionality and how to use the system has not dramatically changed. All your training and experience with FleetOhio will still work for you. The benefits of a Web-based application are numerous for access, functionality and even ease of use. It will reduce the learning curve for new users while retaining the knowledge of existing users.

We at DAS Fleet Management are excited about the web version of FleetOhio and look forward to your feedback on the use of this program. Complete the Test Plan and return it to our **office e-mailbox address** by **Wednesday, April 2nd**.

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DASFleet@das.ohio.gov

Roger Bechtel
roger.becht@das.ohio.gov

Thank You

WE WILL NOW ANSWER ANY QUESTIONS YOU MAY HAVE.