FASTER Fleet Maintenance

User Stories Testing Guide

Version 4.2, July 6, 2020

IR Mission: We strive to make our systems reliable, available, and secure for the facilitation and support of the Texas A&M Forest Service's mission in public service.

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1.0 Introduction

The following document outlines the different tasks someone would need to do (user stories) in the new FASTER Fleet System.

The user stories are split up according to who might do them. From vehicle coordinators to mechanics, operators, managers and the fleet site coordinator for TFS.

Your charge is to go through each of these tasks - regardless of your own role - and give us feedback on how it went and how we can improve the process. Some tasks are specific to the software and how it works while we have the flexibility to customize other tasks.

We can't stress enough that we want you to perform all of the different tasks to get an idea of how what you do affects someone else and vise versa.

Within the examples you will see asset 024651 used a lot. However, you are more than welcome to practice on any asset of your choosing.

FASTER has three unique portals and you'll use all three throughout this document:

1. FASTER Admin Portal: https://fleet.tfs.tamu.edu/FASTER/

   You'll spend most of your time here. This portal is primarily used by vehicle technicians (mechanics & specialists), vehicle coordinators and the site coordinator.

2. FASTER Technician Workstation: https://fleet.tfs.tamu.edu/FASTERTech/

   This portal is primarily designed for mechanics, technicians and specialists completing repairs and PM's on the traditional shop floor.

3. FASTER End User Portal: https://fleet.tfs.tamu.edu/FASTER/portal/

   This portal is primarily for the vehicle operators to see their vehicle's history, check on and request maintenance.

All three of these links, guides and video training can be found on the IR Help Desk Portal: https://helpdesk.tfs.tamu.edu/faster

2.0 Vehicle Technicians (Mechanics & Fleet Specialists)

2.1 How do I quickly find assets in FASTER?

In FASTER, you can search by several different fields including asset #, VIN, serial #, license plate, etc.
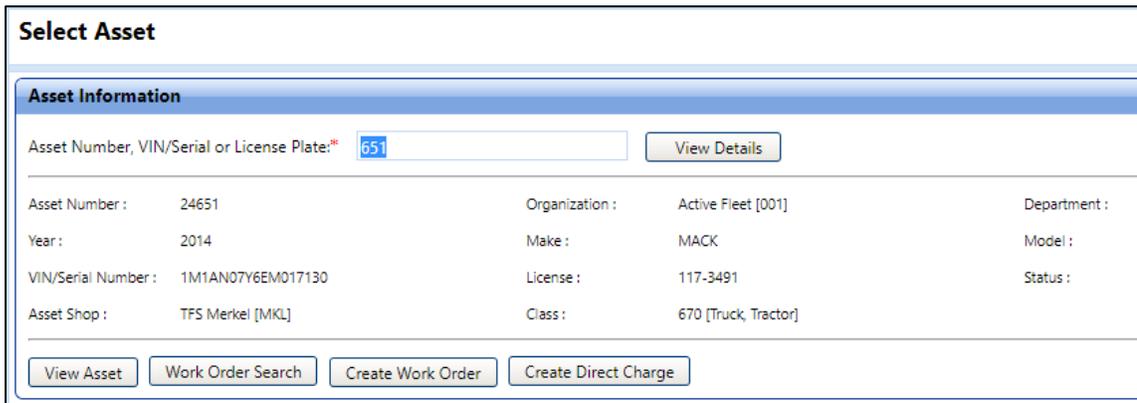
1. Search for an asset by clicking on the **Select Asset** while the **ASSET** tab is highlighted.

2. Enter the partial number you know and click **View Details** button. For this practice enter **651** for TFS Asset 24651.
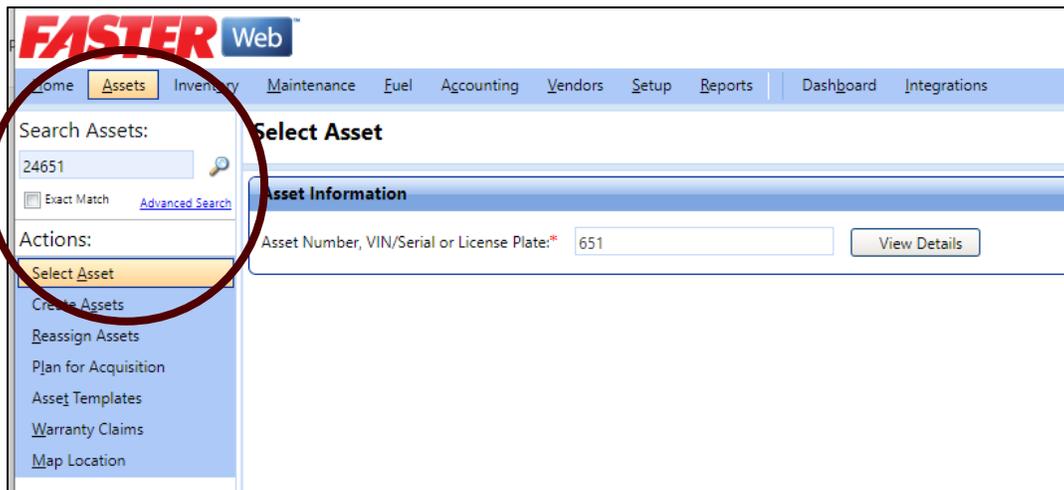
3. Your search results will appear and then you can find which asset you need. Click the appropriate **Select** link.

4. The window will change to the picture below. You can then click whatever action you need.

2.2 How do I create a Work Order?

1. Creating a Work Order (Asset, VIN, Serial, License Plate) - Create a Work Order by clicking on the **Select Asset** while the ASSET tab is highlighted. Enter the partial number you know and click **View Details** button. For this practice enter **651** for TFS Asset 24651.

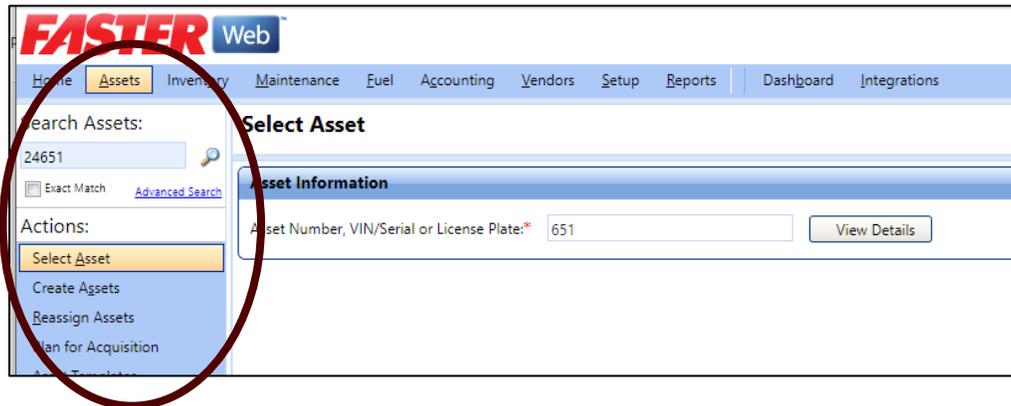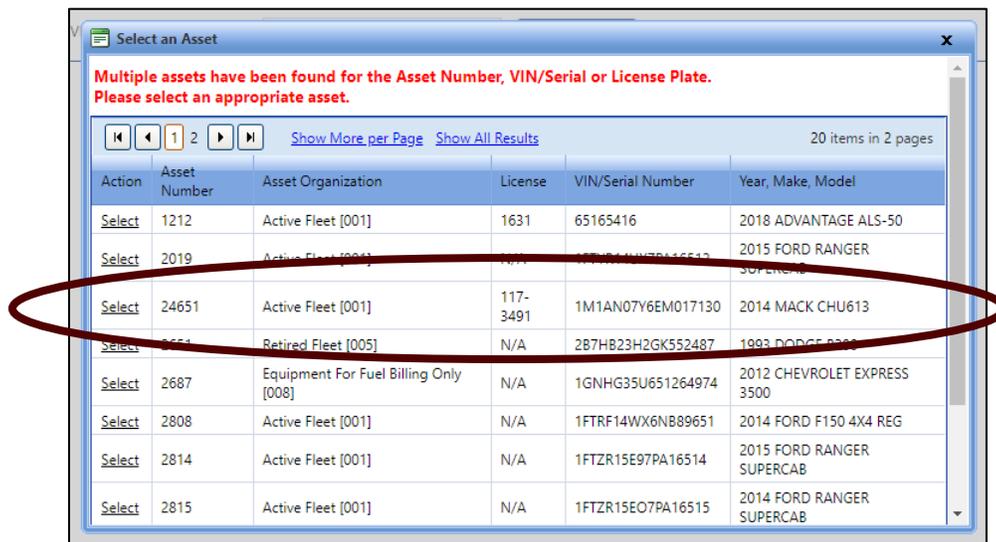2. Your search results will appear and then you can find which asset you need. Click the appropriate **Select** link. Note: If FASTER found your asset directly, you can skip the selection window and go on to step 3.

3. The window will change to the picture below. You can then click the Create Work Order button and a pop-up will appear.

4. A new pop-up will appear (below). The Maintenance Shop selected here will be the default shop listed in that vehicle's master profile. Status must be Active. If there is another work order open for this particular vehicle, there will be a notification.

5. Enter the current mileage reading (for testing purposes, just add 5 miles to whatever the Actual shows), make sure the Bill Code is set to **Bill Nothing.**

6. Lastly, enter a Symptom and for this exercise we will be replacing rear wiper blades. Enter "Needs new rear wiper blades". This is **VERY IMPORTANT**. Later (see below) this **Symptom** allows you and others to make a quick reference to what Work Orders have been done, maintenance/repairs. Otherwise you will have to take extra steps to check each Work Order for what issues and maintenance/repairs have occurred.

Document Number	Document Symptom	Status	Meter Read
44700	Needs new rear wiper blades	Closed [C]	40706 [M]
44699	Needs new wiper blades	Active [A]	40706 [M]
44694	coolant leak	Closed [C]	40699 [M]
44693	test	Active [A]	40699 [M]
44692	Coolant leak	Closed [C]	
24651		Closed [C]	75780 [M]

No info was entered and will require you to open document.

Clearly stated Symptoms for quick referencing.

7. Click **Save**.

8. You have now created a new **Work Order** and the screen below will appear.

| Work Order	44700	Asset	24651[001]	Technician Print		Customer Print

Status   Active   Year /Make /Model   2014 MACK CHU613
Symptom   Needs new rear wiper blades   VIN/Serial Number   1M1AN07Y6EM0171
                                                                                      Engine

Master Repairs Labor Parts Sublet Cost Notes Attachments Downtime

Work Order Identification

🖉 **Edit Identification**

Work Order Number:	44700
Work Order Shop:	FIRST STREET GARAGE [001]
Status:	Active [A]
Priority:	When Possible
Asset Number:	24651
License:	117-3491
VIN/Serial Number:	1M1AN07Y6EM017130
Date/Time In:	5/26/2020 4:40:00 PM
Date/Time Out:	
Date/Time Promised:	
Department:	Incident Response Department [IRD]
Bill Code:	Bill Nothing [002]
Contact:	

Symptom
Needs new rear wiper blades

Work Ord
Meter
M

Work Ord
$0.000
Labor
$0.000
Parts
$0.000
Sublet
$0.000
Other Cos
$0.000
Adjustme
$0.000

Asset Identification

Asset Standard Specifications

2.3 How do I report maintenance done by a TFS shop?

1. Open the respective **Work Order.** Note: This step assumes a WO has already been created.

2. On the Work Order page, click on the **Repairs** tab.

3. Click the "Add New Repair". A new pop-up will appear after this.
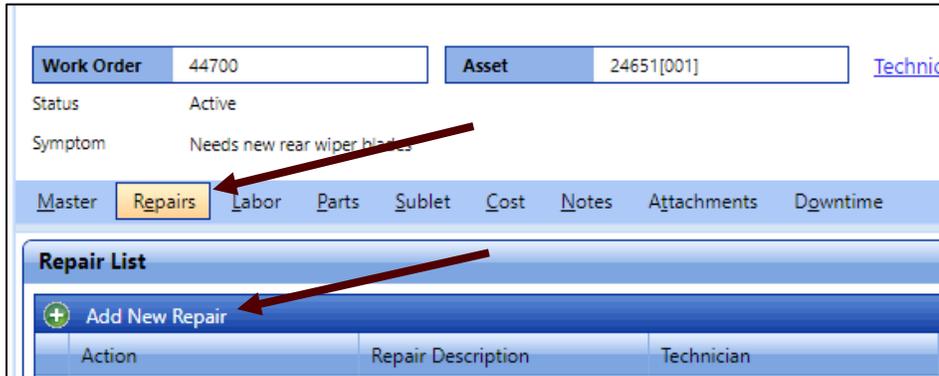
4. In the new pop-up, select the Repair Reason. **Maintenance** is for *ALL maintenance related* work done. You can choose either option on Repair Schedule. For this exercise select **Scheduled**, we decided to replace our imaginary rear wiper blades once a year.
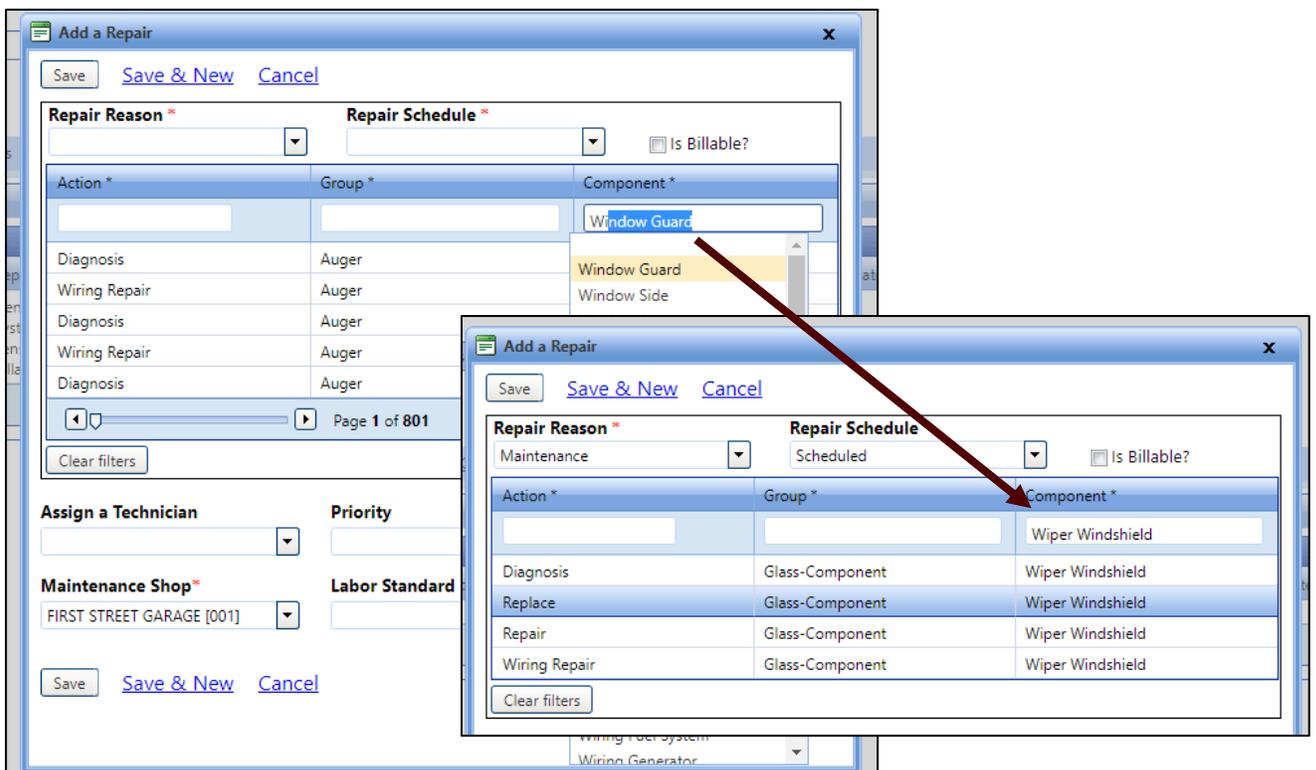
5. Next, starting from <u>Right to Left</u>, enter the **Component** that is being replaced. For this exercise, type in "Wiper Windshield".

6. The **Action** and **Group** columns will automagically adjust to predefined criteria. If you start from the Left side go Right, you will have to sort through numerous categories to eventually narrow down to what is hopefully the correct Component. All of these columns are required to have a selection.

7. Starting at the **<u>Component</u>** column will save you tons of time. Make sure you slowly type in the part being replaced. As you begin typing, a drop box will appear for possible items you want. Naming conventions may be different from what we commonly use. For example, instead of looking for motor oil (if doing your own oil change) you would look for Fluid and then pick Fluid Oil as the Component.

8. Do **NOT** assign a technician. Click **Save**.

9. Your Work Order will now have an associated "New Repair" for the Symptom created.

10. Next select the **Parts** tab, then select the "Issue Parts" button to **Issue Parts**.
    Note: Each unique part (not quantity) should be entered individually.
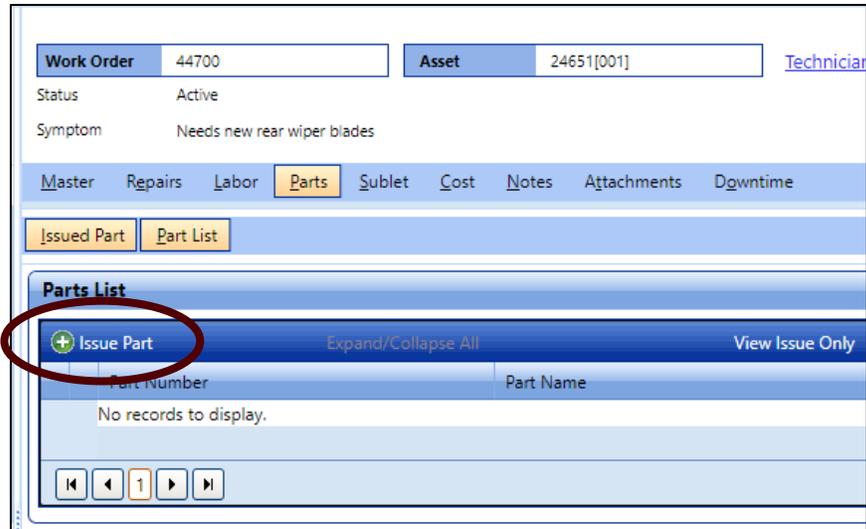
11. Enter the Vendor Item Number into the pop-up screen.

12. This item number will be listed on your receipt. The number needs to be entered correctly because it can be referenced later for this particular vehicle and others using the same part. For this exercise make up a number.

    Note: A FASTER Item Number is inventory parts that we have added with our own numbers.
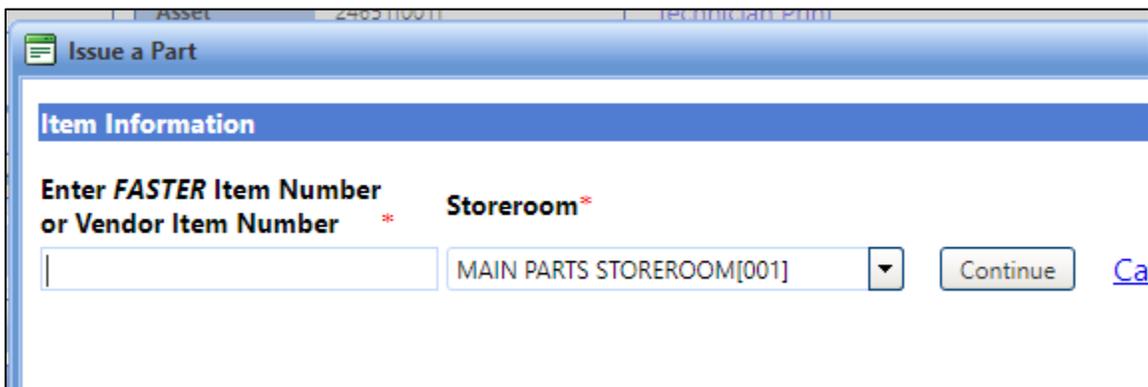
13. A new pop-up window will appear, either stating that the item is in the system or is not. If the part is not found, you'll need to enter the part info:

    Example A:

Example B:

14. Fill in the required information and make up an Invoice Number for this exercise. Normally you would enter the receipt number. A fake PO and Budget Line Item has already been created for you to select.

    Note: for multiple items on one receipt, you will need to enter a modified Invoice Number for each item. Such as oil filter would be - 123456, drain plug gasket - 123456a, 6 quarts of oil - 123456b, air filter - 123456c.

15. Enter a quantity of rear wipers you "purchased" with the unit price. For wipers, they will be classified as an Expendable item.

16. Click **Add Non-stock Item & Continue**. If there is an information missing, an error message will appear at the top of the pop-up.

17. To finish "issuing" the item, select the specific repair you created.

18. Then click the **Issue Item** button.

19. Your issued part will be updated with the name, quantity used, cost per item and total cost.

20. Attach your receipt to this Work Order. Directions to attach a receipt or other documentation directly related to a Work Order can be found **Section 2.6**.

    Your receipt will stay attached to <u>this</u> work order, but not directly to the vehicle's master file. It is important that receipts are attached to the correct work order.

    Receipts need to be entered **before finalizing** the Work Order.

21. Click on the Repair tab. Click the arrow [▶] button, then the **Edit** link by your repair.

22. Your Repair is still open, click the **Complete Repair** to close the Work Order. Then click the **Save** button.

23. Now your "repair" shows Complete.

24. Go to the **Master** tab and select your specific Work Order, then click **Edit Identification**.

25. A pop-up will appear, change your status from **Active** to **Closed**. Save.

26. Your self-performed maintenance is now recorded and completed in the system

27. If you would like a paper copy of the Work Order with part costs, print the **Customer Print** link located top right of the window.

28. Now look up your **Asset** file, then click on **History**, your Parts will appear in a stand-alone column and also add to the cumulative Maintenance cost.

Asset 24651 [001]

Master   Life Cycle,Billing   Meters,Warranties   PM's,SA's   Parts Issued   Parent,Child   **History**   Notes   Attachments   Contacts   Map Location   Alerts

Year * : 2020   **Reporting Year Style** * : Fiscal Year   **Meter Type** * : M

[Show History]   ☐ **Include Warranty Costs in the Repair Costs**

Year	Total Mair	Maintenan	Repair	Accident	Capital	Warranty	Fuel Cost	Fuel Qty	Meter Driv	Idle Hours	Cost/Mete	Meter/Gal	Labor	Parts	Sublets
2020	5,126.780	10.000	5,116.780	0.000	0.000	0.000	213.061	90.340	7	0.00	762.834	0.08	0.00	10.000	5,096.780
Month	**Total Mai**	**Maintenar**	**Repair**	**Accident**	**Capital**	**Warranty**	**Fuel Cost**	**Fuel Qty**	**Meter Driv**	**Idle Hours**	**Cost/Mete**	**Meter/Gal**	**Labor**	**Parts**	**Sublets**
January									0	0.00					
February									0	0.00					
March									0	0.00					
April									0	0.00					
May	5,126.780	10.000	5,116.780	0.000	0.000	0.000	213.061	90.340	7	0.00	762.834	0.08	0.000	10.000	5,096.780
June									0	0.00					
July									0	0.00					
August									0	0.00					
September									0	0.00					
October									0	0.00					
November									0	0.00					
December									0	0.00					
FY To Date	5126.780	10.000	5116.780	0.000	0.000	0.000	213.061	90.340	7	0.00	762.834	0.08	0.000	10.000	5096.780
Life To Date	5126.780	10.000	5116.780	0.000	0.000	0.000	213.061	90.340	40706	0.000	0.131	450.59	0.000	10.000	5096.780

2.4 How do I report a repair done by a TFS Shop?

1. If you perform a **repair**, all of the steps are exactly the same as the maintenance process **EXCEPT** for this one part.

2. When adding a Repair to your Work Order:

   Repair Reason – Should be any reason **EXCLUDING** maintenance related items. Example: General Repair, Accident, etc.

   Repair Schedule – More than likely will be Non-Scheduled.

3. Parts will still be reported in the Parts portion of the History cost. However, instead of adding the cost into the maintenance section, all part costs will be added to the **Repair** cumulative cost.

   If this is reported incorrectly, it will skew the total costs and will not accurately reflect vehicle cost.

   Such as if it appears that repair cost is low for a vehicle that is a "lemon", then it may be viewed as that the vehicle really isn't "as bad" as reported and doesn't need to be the first one replaced.

2.5 How do I report third-party (sublet) work?

1. Create a Work Order.

2. Attach the Quote.

3. When work by the third-party is performed, the asset is ready for pick up and your or your office has received the invoice, perform the next steps:

   In this example, we are using **BrucknerInvoice**.

4. Find your asset and click on the previous work order you created.

5. Verify that the work order is the correct one by looking at the symptom or checking the notes/attachments that you previous entered.

6. Attach the invoice to the same location you put the quote.

7. Now that you have an invoice and verified this is the correct vehicle, click on **Sublet**.

8. You will have to add a repair in the Sublet pop-up screen or you can go to the Work Order page and add a repair under the Repair tab.

   Either is acceptable, however the Sublet entry here seems to flow faster.
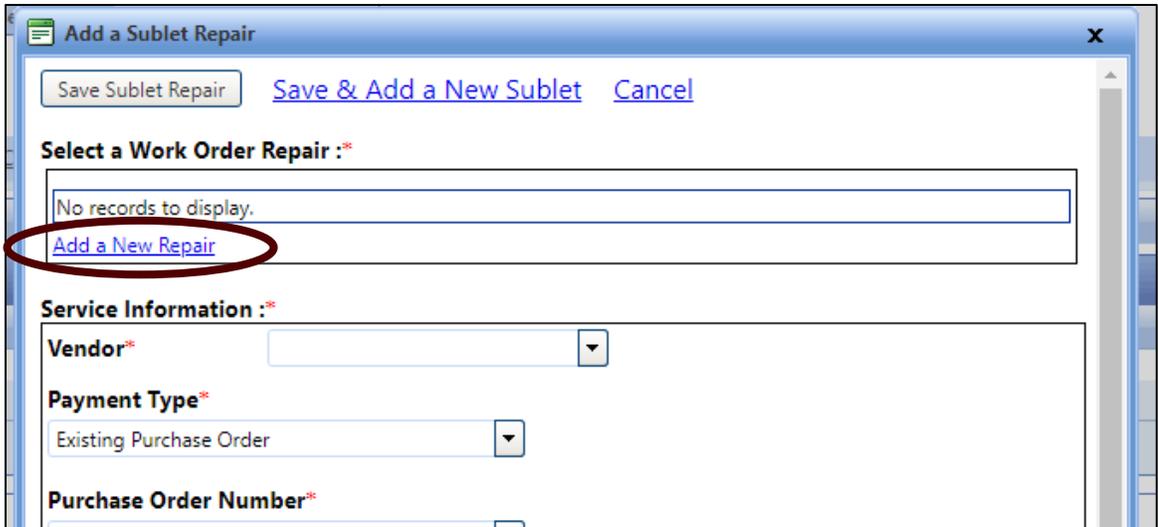
9. A new window will open.

10. Since an outside vendor did the repair, select "**Vendor Repair**". A Vendor Repair can either be non-scheduled or scheduled maintenance. For this exercise, choose **Non-Scheduled**.

11. Next under the Action/Group/Component table, start from right to left. The invoice states the leak is at the Radiator.

12. Type Radiator under component.

13. The rest of the field starts to prepopulate. Group, in this instance, indicates Cooling Engine. Because it was a repair, click Repaid and the remainder will be filled in.

14. Do **NOT** assign a technician.

15. Click **Save**.

16. The repair window will close. Check the newly listed repair box. You can also add more repairs if needed.

17. Next fill in the remainder of the information found on the invoice. This information is needed for reports to be run later and overall costs associated with the vehicle.

18. Enter the information from the invoice.

19. Payment type (under Service Information) will be **Existing Purchase Order**. A general PO will be created for each vendor with an unlimited budget.

20. After selecting the PO for Bruckner, you will have to select the Budget Line item. For this is, we will select **Outside Services**.

21. Enter the dates, times, and the Sub Total cost.

22. Click **Save Sublet Repair**.

23. Now, you will be back at the Sublet List.

24. Click the arrow next to the vendor and all of the info you entered will appear.

25. Now that you have entered the invoice for the vehicle, the repair needs to be completed. Click on the **Repairs** tab to see the screen below. You will notice that the

Repair Status is "Open". Click on **Edit**.

26. This screen will pop up.

27. Click **Complete Repair**, the screen will change to this:

28. Do **NOT** assign a technician.

29. Click **Save**.

30. On your Work Order, with the **Master** tab selected, click Edit Identification.
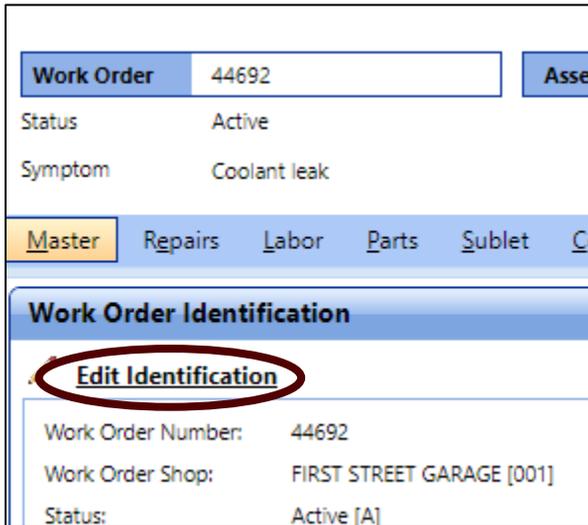
31. Go to **Status**
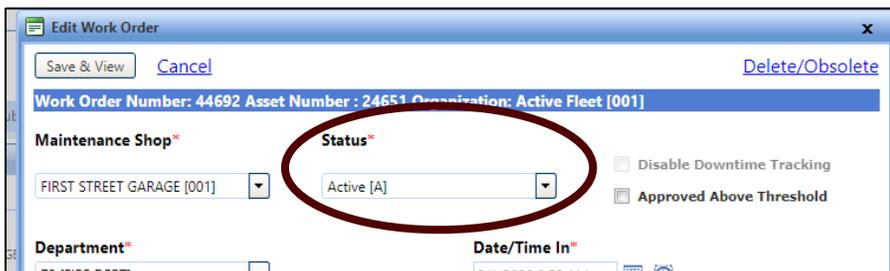
32. Change the status to **Closed** and **Save**.
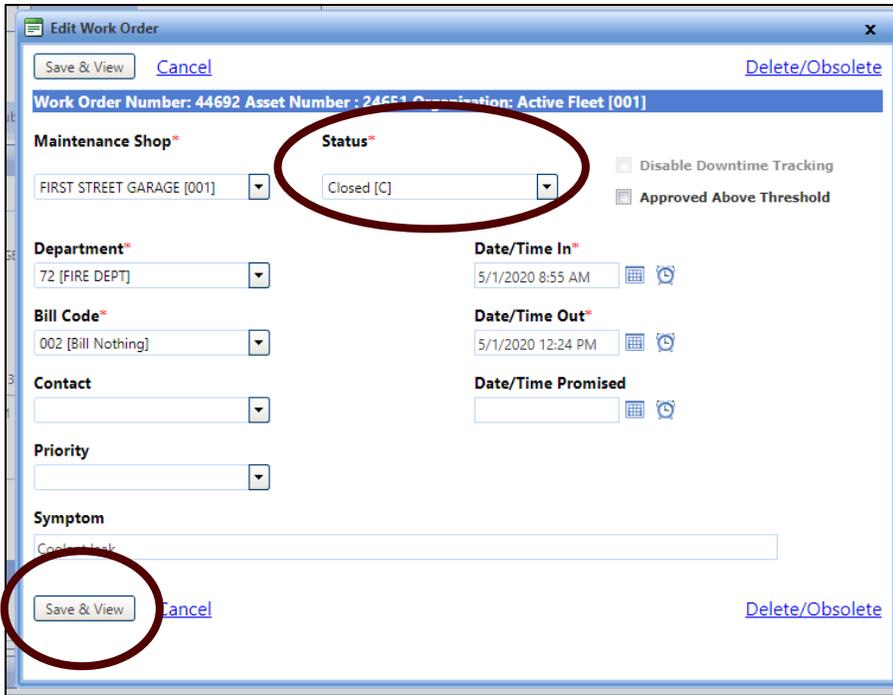
The Vendor Repair Quote, Invoice and Work Order are now complete.

2.6 How do I attached quotes (or other files) to a work order?

1. Quotes, receipts and other documentation related to a specific Work Order should be attached here.

2. Just shortly after creating the work order, you receive the quote for repair (BrucknerQuote). Go to the "Maintenance" tab and enter the TFS Asset number or WO number in the search bar. The asset will appear and midway down on the right side, the work order you created will be there.
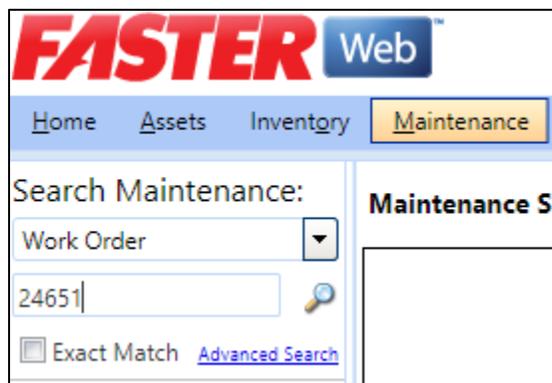
3. Click on the Work Order number that you created. You will return to the page that appeared right after you created the work order.

4. Once within the Work Order, go to the Attachments tab and add the quote, image or other document.

5. A new pop-up will appear.

6. Add your file, PDF is preferable.

7. Categorize as Estimate (for quotes). Restate reason for quote and include the vendor quote number. This number can help you verify a legitimate invoice later down the road.

8. Click Attach File.

9. A new row will appear with all the information you entered. If you forgot something, click the Edit link on the left of the row and update your information. Notice that a paperclip icon has now appeared next to the Attachment tab. This indicates that something has been added. The same will work for notes if you add something there.

2.7 How do I attach files (like user manuals) to an asset?

User manuals, warranty info and other documentation **not** related to Work Orders will be entered here.

1. Enter your Asset number **24651** to view the Master File, then click on the **Attachments** tab.

2. After the Attachment screen appears, click on **Add New Attachment**.
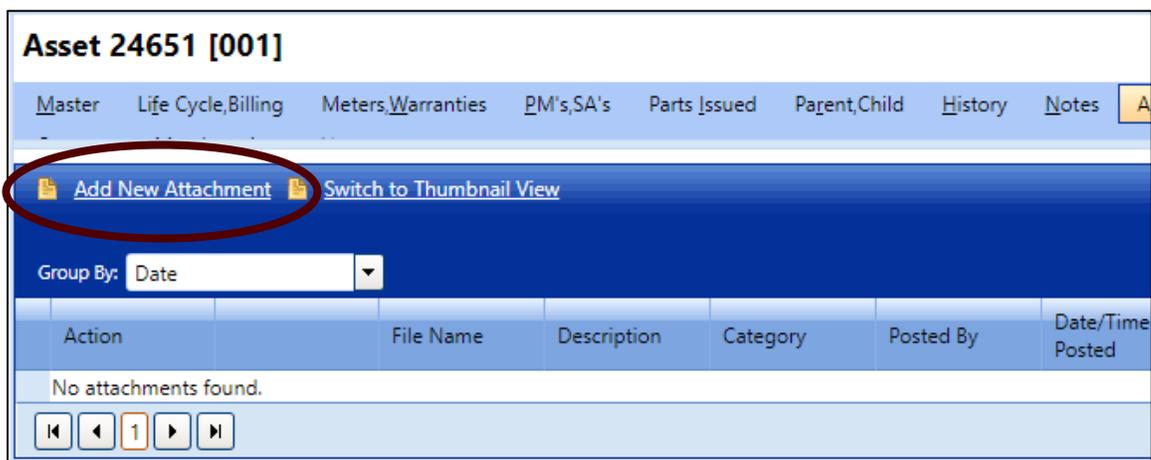
3. A pop-up window will appear. Attach the file by clicking on the Browse folder. Your uploaded file will appear below with options to remove if you attached the wrong file by accident.

4. Once the file is attached, Select the Category that is most appropriate for your document.

   Enter keywords and a description of your document. Be as descriptive as you can here. Since this data will be available agency wide, we want to make sure everyone knows what kind of document this is.

5. Then click the **Attach File** button.

6. After saving your attached file, it will appear back on the Attachments tab.

   A **paperclip icon** will appear next to the Attachments tab. This lets you know there are attached documents.

   As you can see below, entering in the **description and category** will help you quickly identify what files are present.

7. If more than one file, you can sort by clicking the column headers.

8. **Other** documentation can be added here as well. Just remember that every attachment needs to have adequate information added so that it doesn't cause confusion or extra steps to find out what it is.

2.8 How do I search for all Work Orders for an asset?

If you would like to go see all work orders for a particular asset:

1. You can return to the Maintenance page and click the **Advanced Search** option under the search bar.
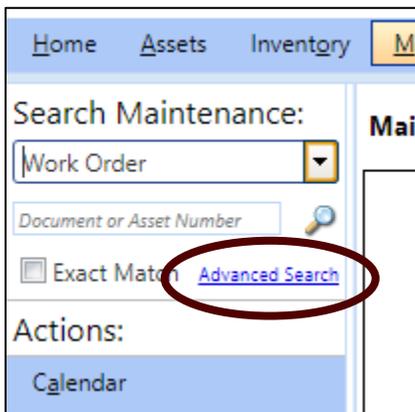
2. Enter the Asset Number and set the Asset Organization to Active Fleet on the screen below. **Select** the "Include Closed Work Orders". Click **Search**.
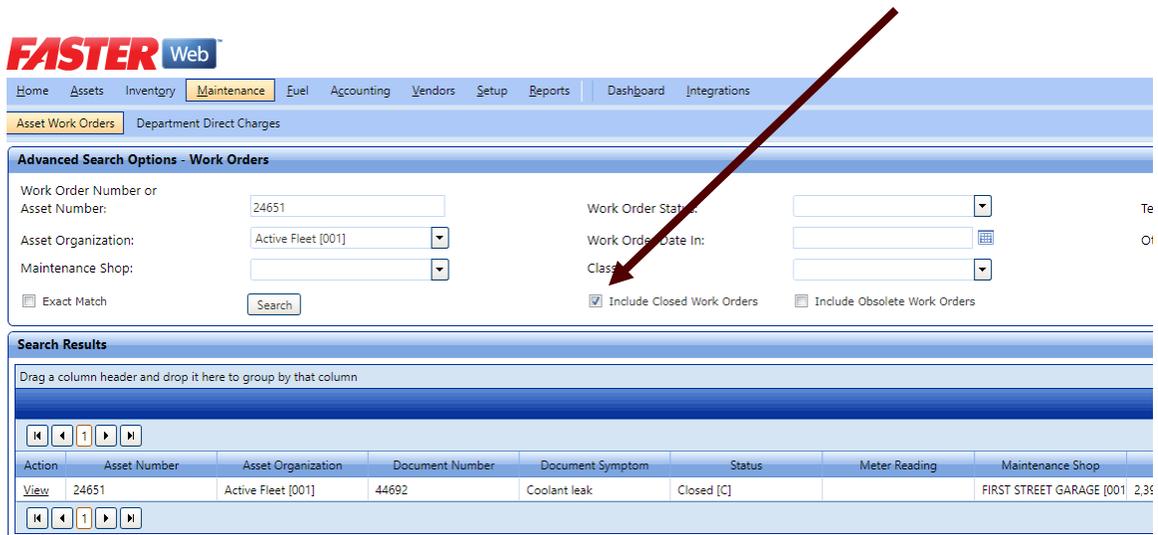
3. These search results will show all the active and closed work orders, including their symptom, for that particular vehicle.

Your attachments will only be visible by viewing these work orders here. They will NOT appear on the Asset Master file.

2.9 How to I print a Work Order?

A **Work Order** gives you the option to print a Customer Print or a Technical Print.

However this same exact print can be accessed from the Customer Portal when reviewing the Repair History of an asset.. Individual Vehicle Operators can print their work order history at any time.

1. To get started, search for your Work Order.

2. **The Customer Print out will open in a new window.**

2.10 How do I assign a technician to a Work Order?

You can assign a technician when creating your maintenance or repair entry or you can assign a technician after the fact.

This assumes you already have a ==Work Order== created for this ==Repair==.

1. Go to the **Maintenance** tab and search for your Work Order by WO# or asset.

2. Go to the Work Order **Repairs** tab.

3. Edit the repair you want to assign a technician to.

4. In the drop down list, assign the appropriate technician.

Note: In FASTER technicians will mostly be limited to native TFS shop personnel, mechanics and fleet specialists. If a repair is done by a vehicle operator, task force or an external repair, do not assign a technician.

2.11 How do I enter a meter reading?

Any time a Work Order is created, FASTER captures a meter reading at that time. Regular meter readings will also come into the system regularly for most vehicles through the fuel card data imported daily.

Aside from those two entries, if you need to make an extra meter reading for one reason or another, the steps are the same as what a vehicle coordinator does at the end of each month. Section 3.7

2.12 How does a vehicle operator get notifications of a PM?

PM notifications are automatic in FASTER. As long as two conditions are met:

1. There is a PM schedule set up for that asset or class of asset.

2. The notifications and contacts are properly set up for that asset. See Section 3.4.

If the above is done, vehicle operators will get notified for a number of activities including but not limited to:

- Scheduling service
- Completed WO's
- PM is needed

2.13 How do I update shop hours for appointments?

1. Go to the **Setup** tab, then click the **Fields** link under **Maintenance**.
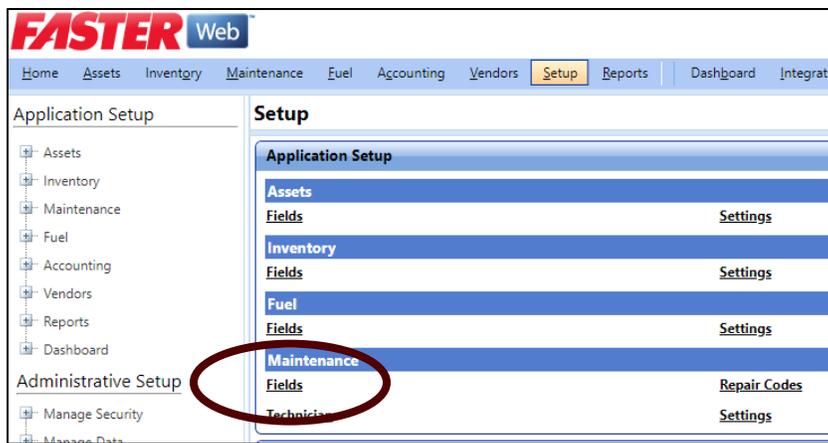
2. A new window will appear, click on **View** for **Maintenance Shop**.

3. A new window will appear.

4. Click **View Availability** to see current days / hours available for appointments for the shop you want to view.
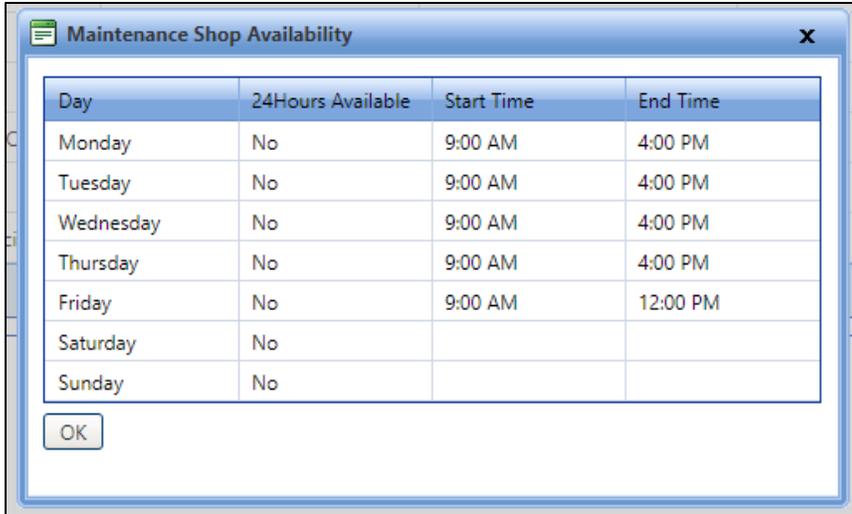
5. Click **OK** to **Exit**.

6. Click **Edit** if changes are needed.

7. A pop-up will appear, here the hours can be adjusted as well as the **Appointment Default Duration**.
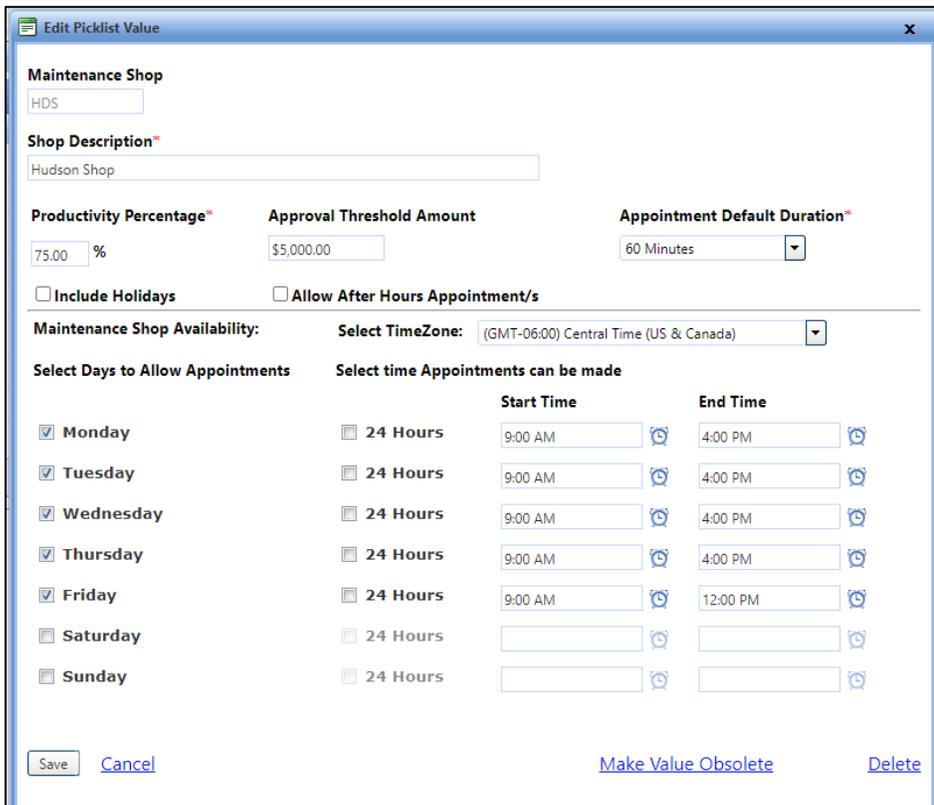
8. Make adjustments as needed and click **Save**.

9. When customers go to request an appointment, they will only be allowed to select a time within those hours selected.

2.14 Managing TFS Shop Appointments

Creating an Appointment

You can create an appointment for an asset. Creating an appointment includes assigning appointment status, date and time, and asset contacts to receive email notifications about the appointment.

Some appointments may already be here because the have already been scheduled by a vehicle operator.

1. **To create an appointment, c**lick the **Maintenance** module.

2. In the **Actions** section, click **Calendar**.

3. The **Calendar** page opens.

4. In the calendar area, right-click at on the calendar where you want to make your appointment and select **Create Appointment**.
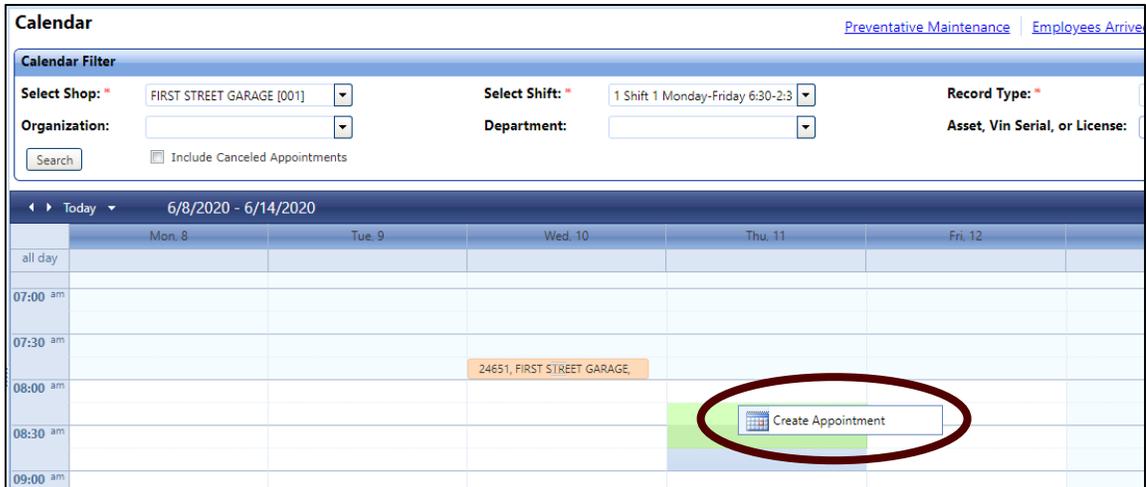
5. The **Create Appointment** dialog box opens.

6. In the **Asset Number, VIN/Serial Number or License Plate** box, type the asset number, vehicle identification number, or license number of the asset.
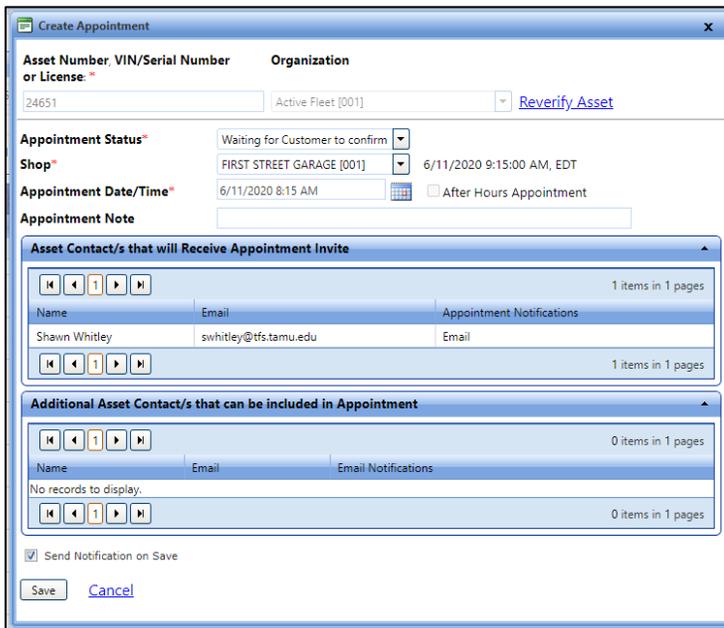
7. Click the **Verify Asset** link to verify if the asset number is present in *FASTER* Web.

8. One of the following occurs:

9. If there is a single asset present in *FASTER* Web for the specified asset, VIN, or license plate number, the **Create Appointment** dialog box is displayed.

10. If there are multiple assets present in *FASTER* Web for the specified asset, VIN, or license plate number, the **Select an Asset** dialog box is displayed. In the **Action** column, click the **Select** link next to the asset for which you want to create an appointment. The **Create Appointment** dialog box is displayed.

11. If there are no assets available for the specified asset, VIN, or license plate number, an error message is displayed.

12. In the **Appointment Status** list, select the appointment status as **Waiting for Customer to confirm** or **Confirmed**.

13. In the **Shop** list, select the maintenance shop to create an appointment.

14. In the **Appointment Date/Time** field, type the date and time in the MM/DD/YYYY HH:MM:SS AM/PM format –OR- Use the icon to use the calendar.

15. You can add additional contacts to be listed and to receive emails if needed.

16. When finished, click one of the following:

17. **Save** to save the information and close the window.

18. **Cancel** to disregard any changes and close the window.

Editing an Appointment

You can edit an appointment to modify or update the details of the appointment. You can edit the appointments created in *FASTER* Web or created by the Customer Portal user. After the appointment is modified or updated, an email notification is sent to the asset contacts.

To edit an appointment:

1. Click the **Maintenance** module.

2. In the **Actions** section, click **Calendar**.

3. The **Calendar** page opens.

4. Using the calendar search, search the appointment that you want to edit. The appointment is displayed in the calendar area.

5. Right-click the appointment and select **Edit Appointment**.

    Note: You can also double-click the appointment to edit an appointment.

6. The **Edit Appointment** dialog box opens.

7. Make the required changes.

8. When finished, click one of the following:

   Save to save the information and close the window.
   Cancel to disregard any changes and close the window.

Confirming an Appointment

With the required permission, you can confirm the appointments created in *FASTER* Web. You can also confirm the appointments created by the Customer Portal user. After the appointment is confirmed, an email notification is sent to the asset contacts.

To confirm an appointment:

1. Click the **Maintenance** module.

2. In the **Actions** section, click **Calendar**. The **Calendar** page opens.

3. Using the calendar search, search the appointment that you want to edit. The appointment is displayed in the calendar area.

4. Right-click the appointment and select **Confirm Appointment**.
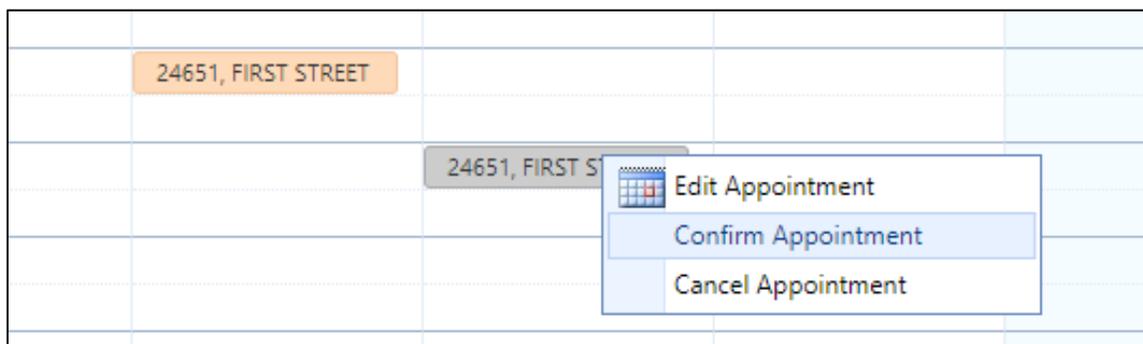
The appointment is confirmed.

5. You can also confirm an appointment in the **Edit Appointment** dialog box. In the **Edit Appointment** dialog box, in the **Appointment Status** list, select **Confirm**.

Cancelling an Appointment

With the required permission, you can cancel the appointments created in *FASTER* Web or created by the Customer Portal user. After the appointment is cancelled, an email notification is sent to the asset contacts.

To cancel an appointment:

1. Click the **Maintenance** module.

2. In the A**ctions** section, click **Calendar**.

3. The **Calendar** page opens.

4. Using the calendar search, <u>search</u> the appointment that you want to edit. The appointment is displayed in the calendar area.

5. Right-click the appointment and select **Cancel Appointment**. The appointment is cancelled.

2.15 How do I convert a requested appointment to a Work Order?

1. Under the **Maintenance** tab, select **Service Requests & Alerts.**

2. Select **View** for the specific service request.

3. A new window will appear.

   Review the details. If there are no edits needed, click **Convert to Pending**.

4. Create a Work Order for that Asset with the scheduled appointment.

5. Once a Work Order is created, there should be a paper icon next to **Repairs**.

6. Click on that tab and the scheduled appointment/service request's repairs should be automatically added for you.

7. You would then perform maintenance and/or repairs as normal.

2.16 How do I enter bulk inventory? (Optional)

Note: This feature of FASTER is optional. When entering Work Orders, you do need to put some part information but that can be done on the fly. However, if you decide that in your shop, you will use the parts inventory features, those can be pulled from when entering work orders that require the parts.

Use of this feature is up to individual TFS shop discretion.

The **Order Items** menu **section** lets you create an order to request parts, fluid, or fuel from a vendor. The vendor ships the requested items to the specified location. An order can contain one or more item requests.

To create an order:

1. Click the **Inventory** tab, then click **Ordering**. The **Create New Order** page opens.

2. In the **Vendor Name** list, select a vendor from whom you want to order the items.

3. In the **Ship to Location** list, select a location to ship the items in the order.

4. Click **Continue**.

5. In the pop-up window **Create Standard Order**, type in AutoZone for the **Vendor**, then select **Main Parts Storeroom** if not already populated.

6. Select **Payment Type** as Existing Purchase Order and then use the existing **Purchase Order Number.**

7. Upon saving the order details, the **Order** page opens.

8. In the **Line Items** tab, click the **Add New Line Item** link.

9. In the **Add Line Item** dialog box, add an item to the order. For this exercise, use **Merkel Oil**. *Note: You will need to remember this "Item Number" for later when you add parts to a Work Order.*

10. Fill in the required info. *NOTE that if you purchased bulk oil and this is for small engines (not transports or dozers), you need to break down the number of gallons into quarts then enter the information. Otherwise you will be issuing gallons of oil.*

11. Click **Save**.

12. The window will now be updated to include the inventory you added.

13. To add additional information related to the order, click the **Notes** tab. If you have purchased and have this item on hand, it will be easier to do everything at one time. You would create the order and then select the **Finish**

14. **Close And Receive Order** at the top of the window.

> **Note:**
>
> - In the **Order** page, you can:
> - Click **Finished - Close Order** to close the order after receiving the items.
> - Click **Finished - Keep Order Open** to keep the order open even after the receiving the items.
> - Click **Finish - Close and Receive Order** to close the order and continue to receive the order.
> - Click **Cancel Order** to close the order before receiving the items.
> - Click **Print Order** to print the order details.

15. A new pop-up will appear, enter the **Invoice Number** from your receipt and the final **Invoice Total**. Click **Save** when completed.

16. The Ordering Invoice will be updated with the bulk item you added for inventory. Click the **Receive** link to receive the items.

17. A pop-up window will appear, finalize your bulk inventory by clicking the **Receive Line Item Button**.
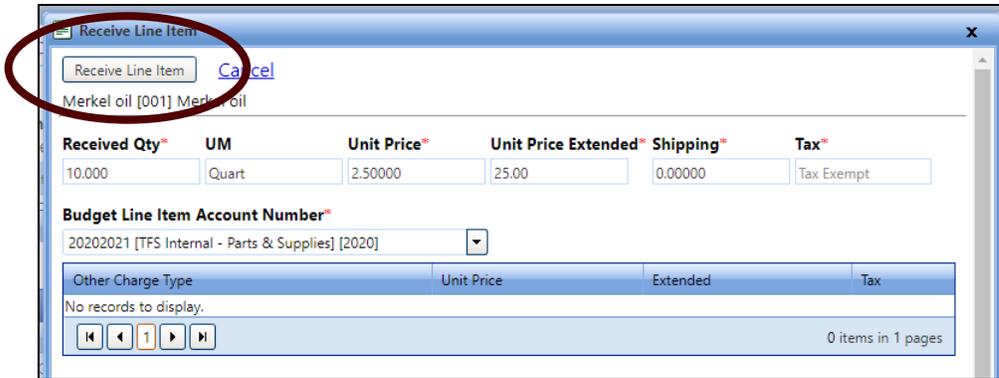
18. The bulk inventory item will disappear. This parts Order is now complete.
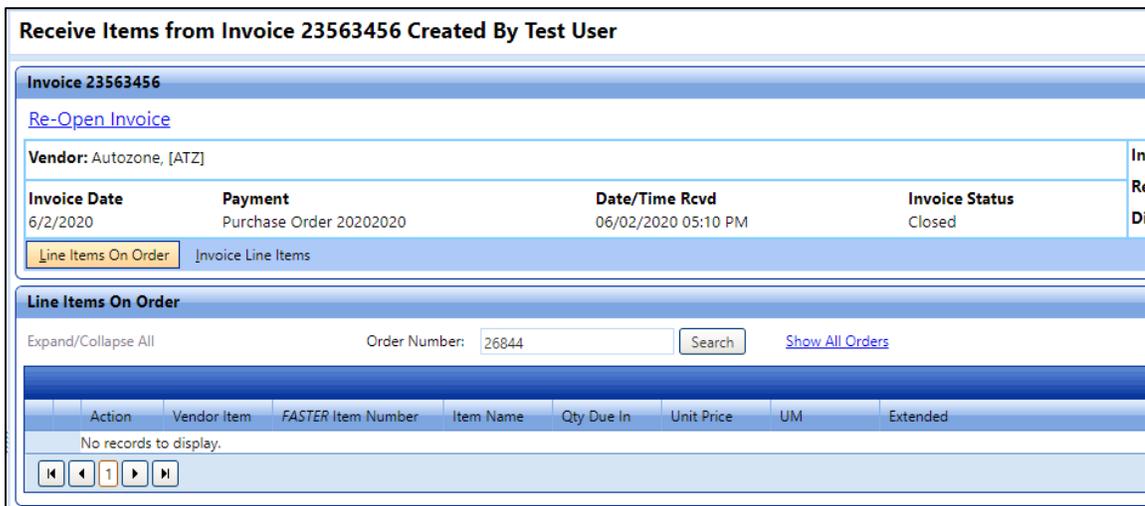
19. So next time you go to Issue A Part to a Work Order and enter Merkel Oil, you will see the name and the quantity available.
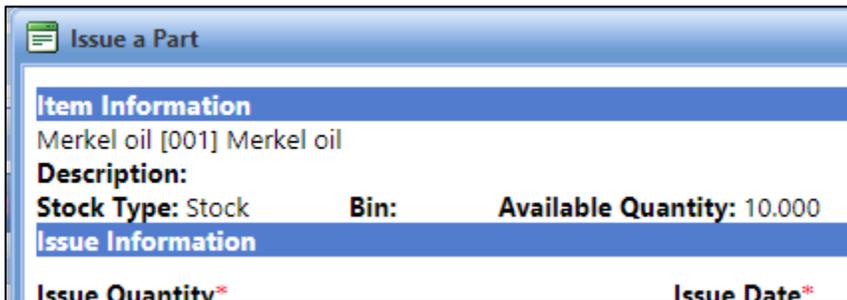
20. IF you decide to **Add New Item,** you can set stock settings, custom specifications, vendor details, substitute item records, price settings, warranty, notes, and attachments. However, you will still have to Order and Receive the inventory.

6. In the **Stock Type** list, select one of the following options:

   o **Stock** - Items having inventory records maintained in the *FASTER* Web. For example, tire, and battery.

   o **Non-Stock** - Items having no inventory records in the *FASTER* Web. For example, screw, and grease.

2.17 How do I use the FASTER Technician Workstation?

1. On the FASTER Web version, Go to **Maintenance**, **Manage Shop Floor Activity**, **and Repairs & Labor** and then enter the **asset** that a Work Order is created for and click **Search**.

2. For this example, we will work on Work Order 44699. Choose a Work Order and click the **Edit** link.

3. A pop-up window will appear. You will need to **Assign a Technician**, click **Save**

4. For this exercise, I choose Alfred Smith as the technician.
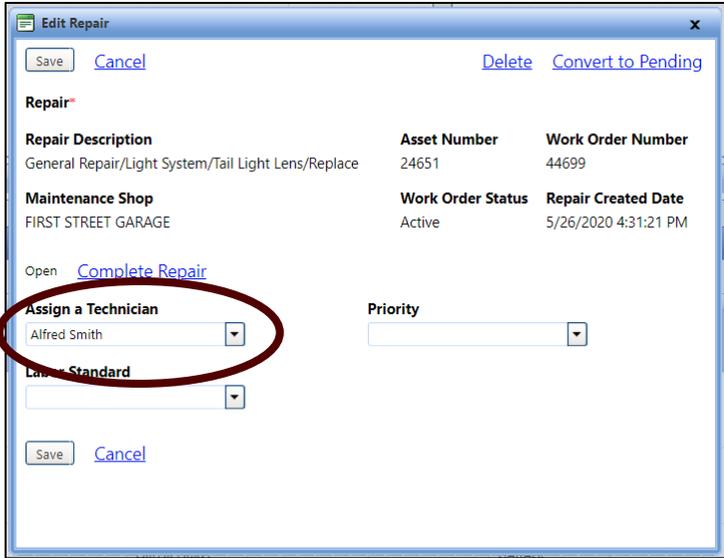
5. The pop-up window will disappear and the technician you added will appear on the previous screen.

6. Next, you will need to login to the FASTER Technician Workstation.
https://fleet.tfs.tamu.edu/FASTERTech/

7. For this exercise, I am Alfred Smith and would select my profile.

8. A new screen will appear with the Work Order Repairs that are assigned to Alfred Smith.

9. I select the Work Order / Repair that you will be working on, it will become highlighted. Then I click **Begin Selected Repair**.

10. A new screen appears with the specific repair information selected.

11. From here you can add notes to the work order by clicking the **Add New Note** button.

12. A new popup will appear and you can add a subject and notes.
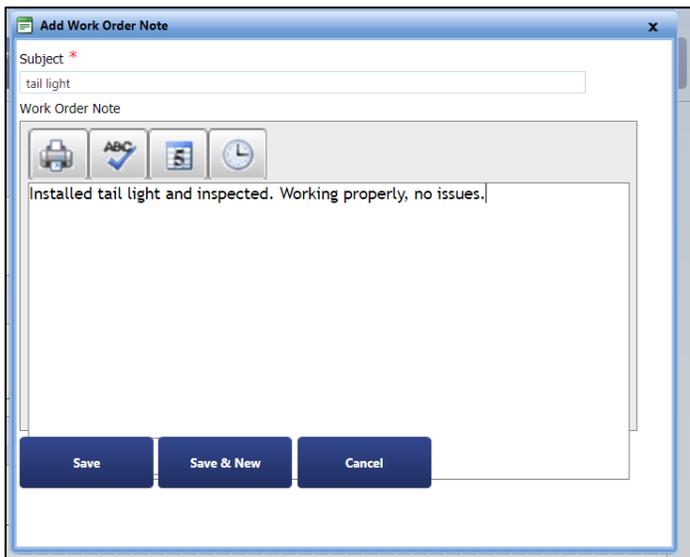
13. When finished, click the **Save** button.

14. You can now select the **Work Order Notes** button

15. The screen will change and show all note subjects that we entered. Select **Show** to view your previous notes.

16. When done reviewing the notes, click **Close**.

17. Then click **Back to My Repair**.

18. Back at the Work Order Repair screen, select **Add New Repair to Work Order**.
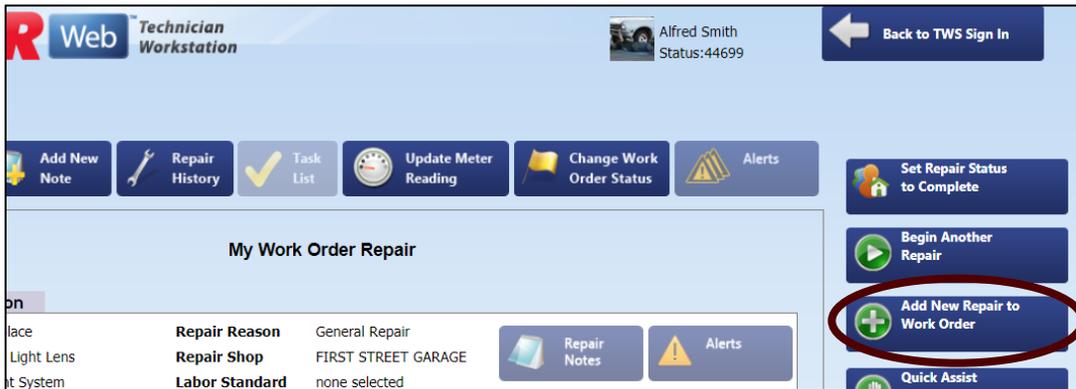
19. You then can add a **Category** to whatever the relation is to the repair. You can add multiple categories. For this exercise to fix a broken taillight, we are going to select **Expendable**.
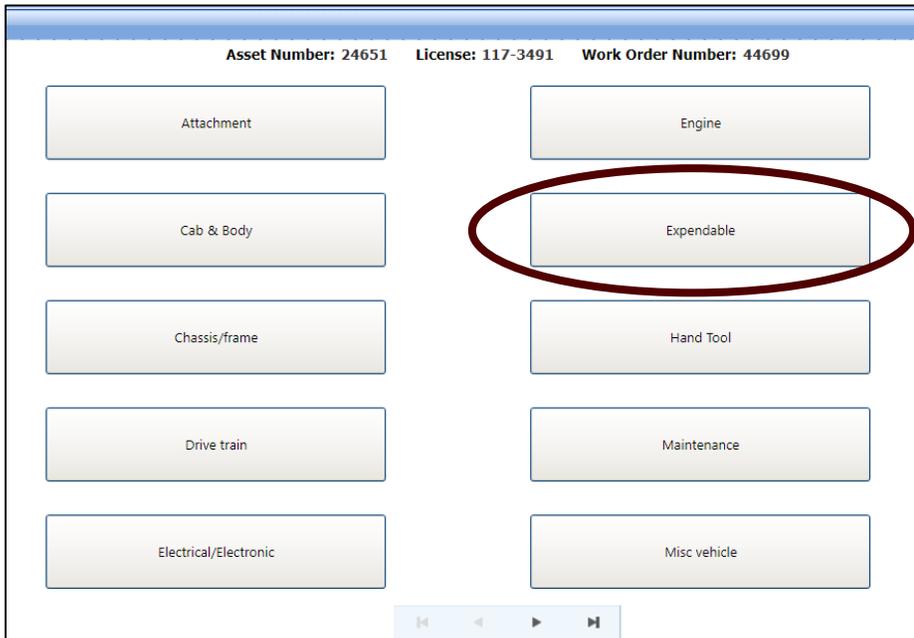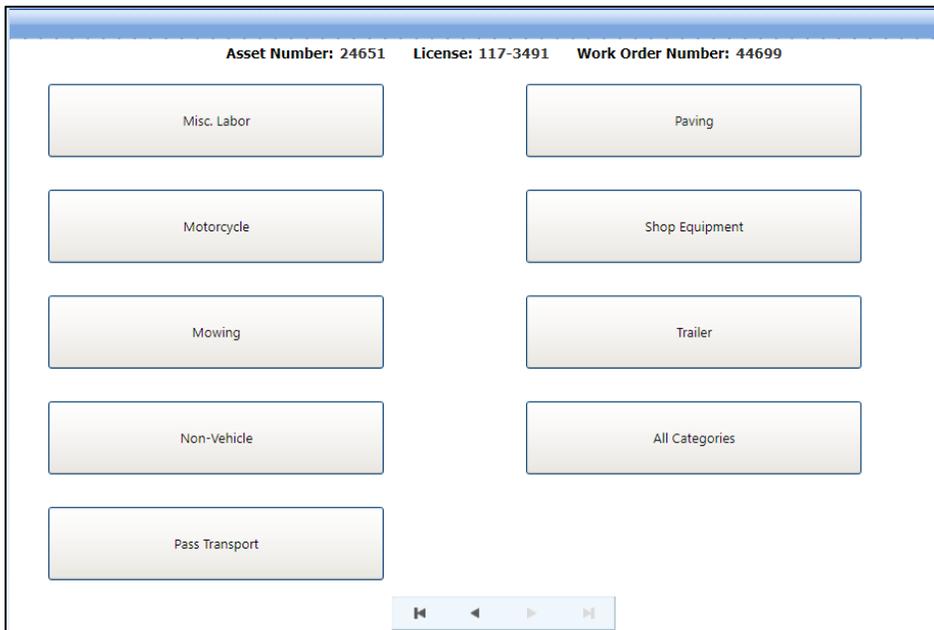
20. The repair category will be added, then click on the button for **Expendable**.
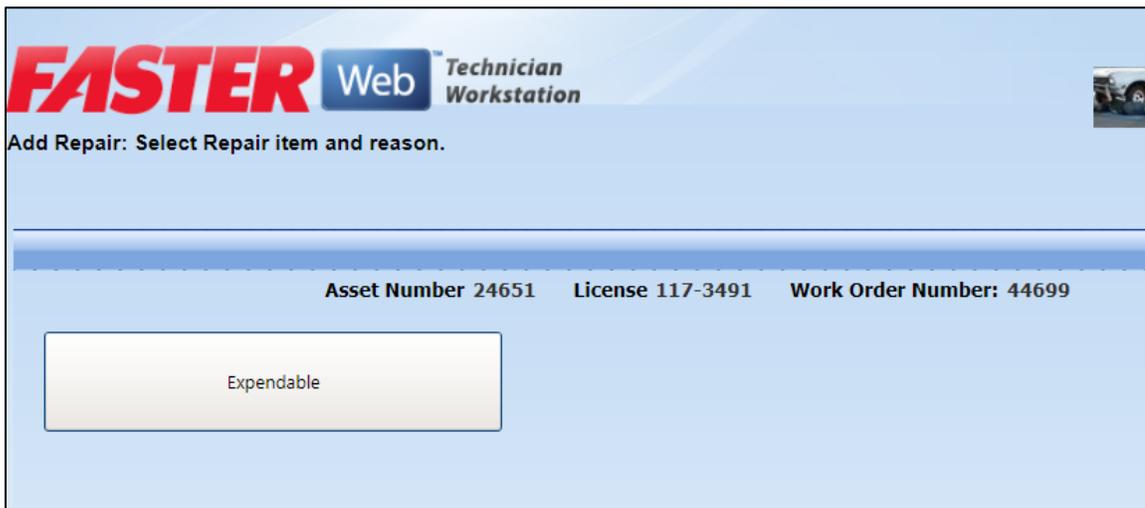
21. You will then need to select a component for the category, for this exercise select **Misc Parts**.
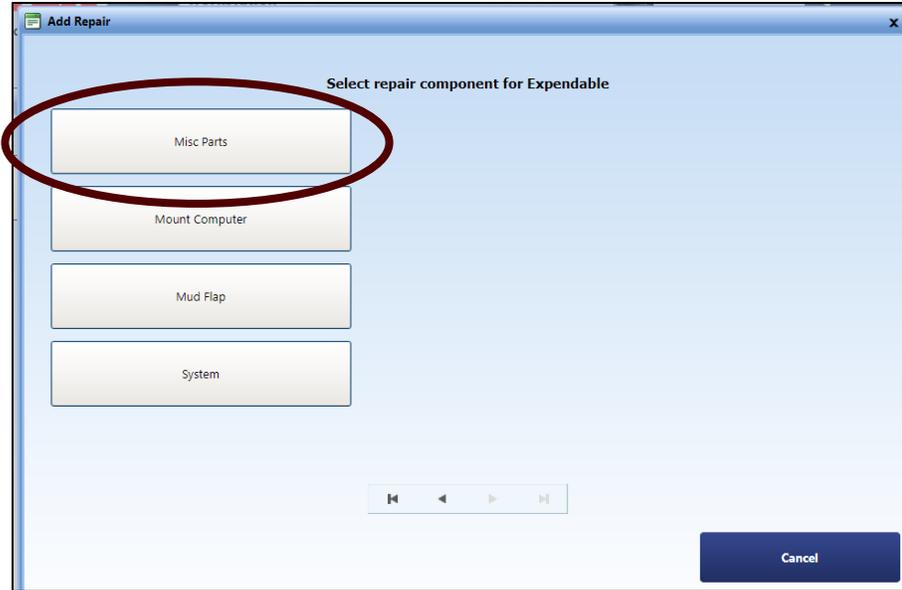
22. Then select the repair option, **Replace**. Then select **Accident** for this exercise.
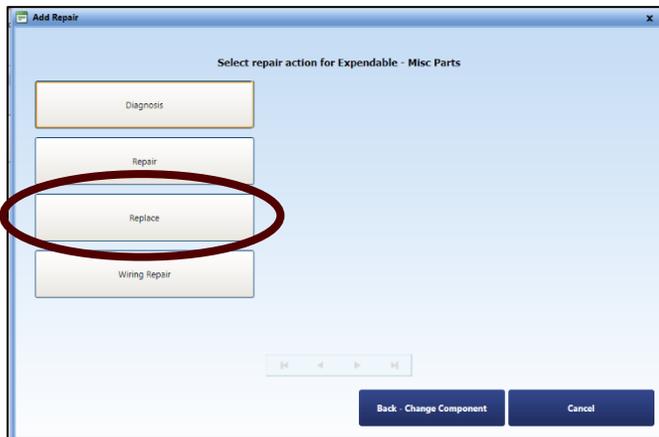
23. A new screen will appear with your newly added repair.

24. On the right hand side of the screen **Select Add & Begin this Repair**.

25. Next, since you have now completed the repairs and are done with the repair, click **Set Repair Status to Complete**.

26. The Work Order should be complete on the technician side, now you will have to log back into **FASTER Web**.

27. Find the work order you created earlier and were performing repairs on.

28. Update Status under **Edit Identification** to **Finished** or **Closed**. Finished would be if items still need to be added, i.e. parts, other invoices, etc. If a Repair is **Finished**, you will still have to **Close** it out to complete the Work Order.

29. Click **Save**, your Work Order is now **Closed** and will disappear from the pending active list.

3.0 Vehicle Coordinators (Support Staff)

3.1 How do I create a work order to record maintenance or a repair?

1. Create a Work Order for the asset you need to record maintenance or a repair for.

2. Enter the maintenance performed by the Vehicle Operator.

3. (Or) Enter the repair performed by the Vehicle Operator.

3.2 How do I record work done by a third-party?

1. Create a Work Order for the asset you need to record third-party work or if you are processing an invoice.

2. Enter a third-party (sublet) invoice as a part of the Work Order.

3.3 How do I set up a new vendor?

1. In order to enter a Sublet for a Third Party Vendor, they must be entered into the system and have an accompanying Purchase Order (PO).

2. To see if a vendor is already in the system, click the Vendor tab and then use the search bar or Advanced Search feature.
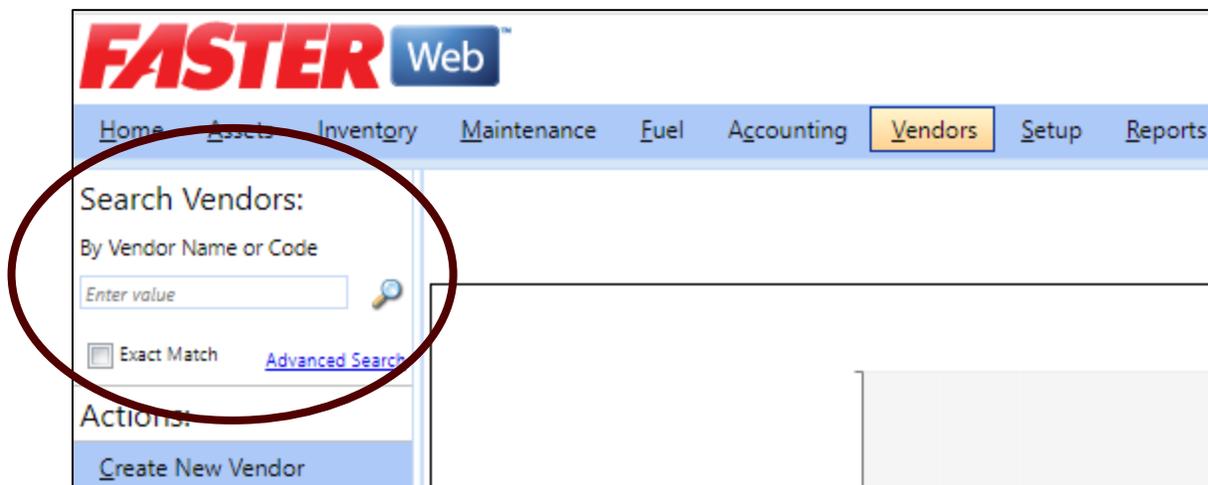
3. Provided that after searching and the Vendor is not already in the System, click the Create New Vendor.
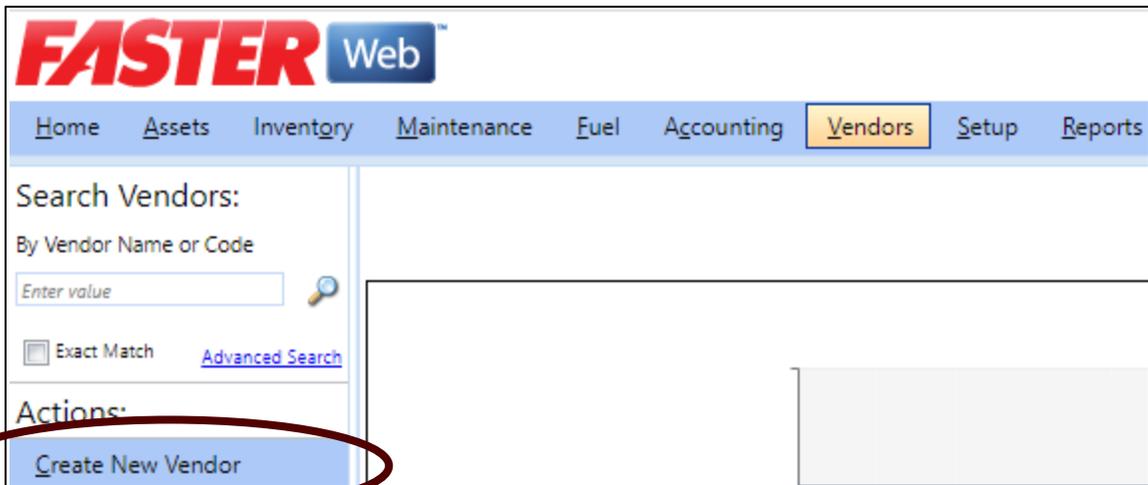
4. A new pop-up window will appear. Fill in all known information.

   When entering a Vendor name, if it is a chain – use the format "Bruckner Truck Sales INC – Abilene" or "Bruckner Truck Sales INC – Amarillo".

   You will have to make up a Vendor Code for the Vendor, try using letters from the Vendor's name.

   Vendor Status will be Active.

5. Under Vendor Category – The Vendor for repairs or maintenance needs to have Sublet moved from the Not Selected box to the Selected Box

6. Select Sublet and click the **Add** > button.
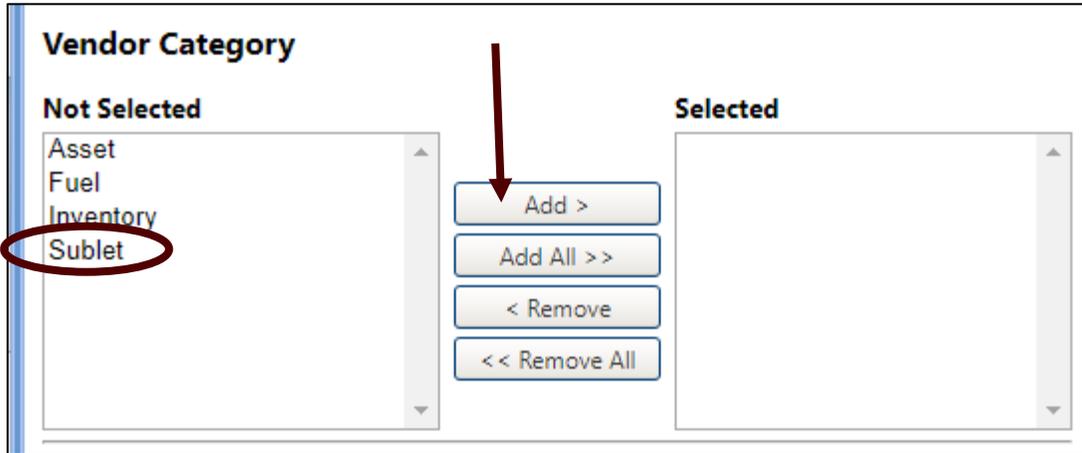
7. Click **Save**.

8. A new window will appear with your newly created Vendor.
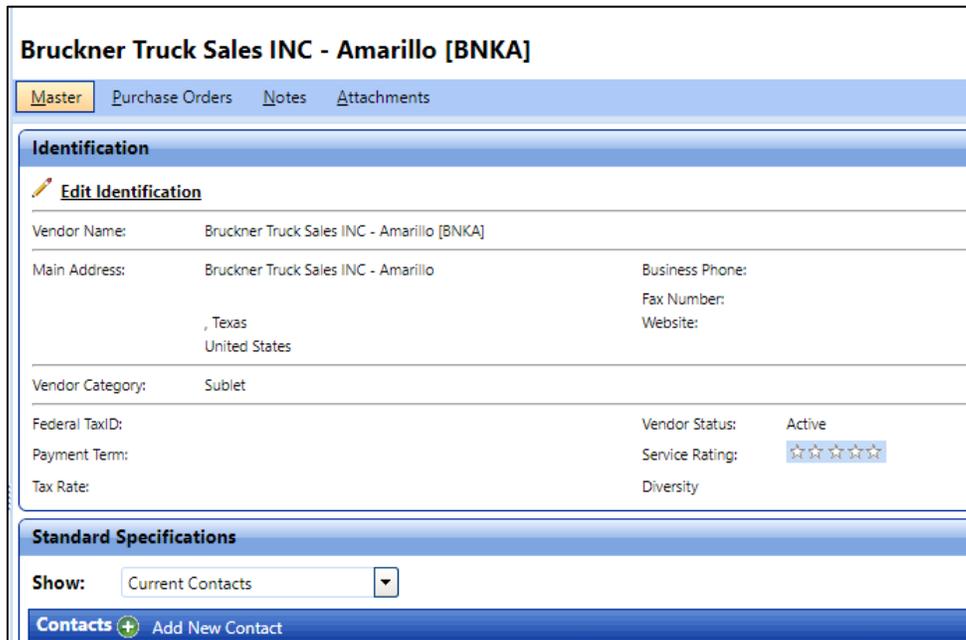
9. You will then need to click the Purchase Orders tab.

10. Click the "Add New Purchase Order".
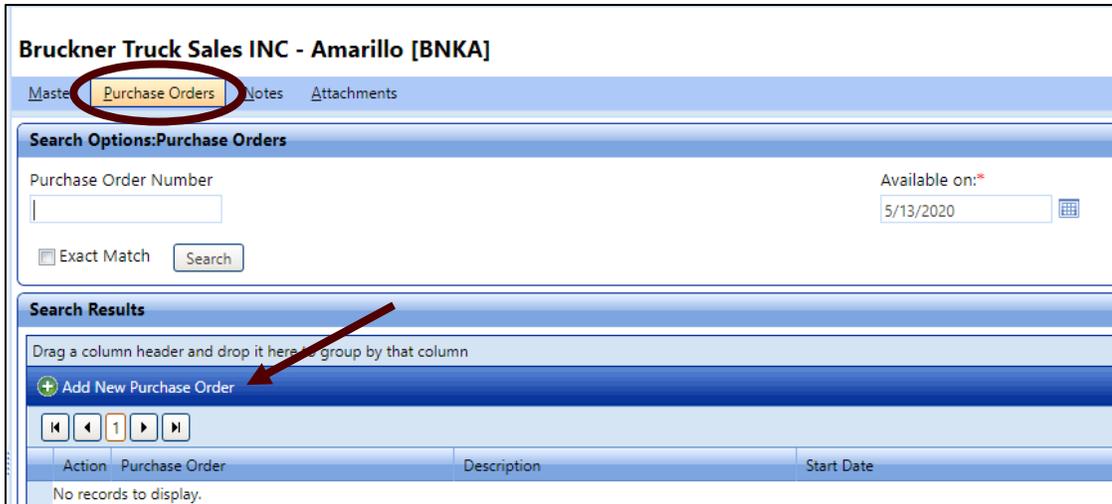
11. A new pop-up will appear.

12. Enter Purchase Order number, for training it is suggested that you use the phone number for that vendor.

13. Select a starting date prior to the date that of a respective Work Order, Quote or Invoice you are working on. Recommend entering the Effective End Date for 8/31/2100.
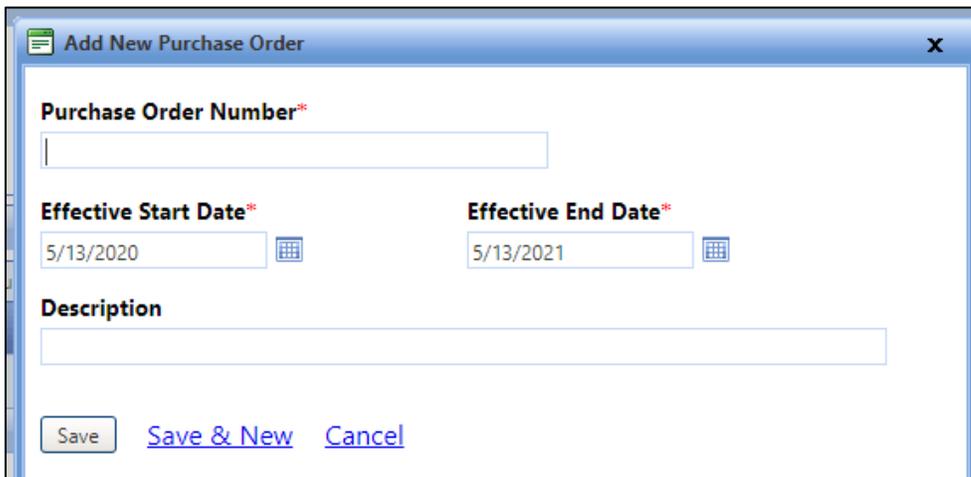
14. Add a general description of what facility does and click Save.

15. The window will change and you will see your new PO.

16. If changes are needed, you can click Edit.

17. Select the ▶ on the far left, this will make a drop down for Budget Line Items.
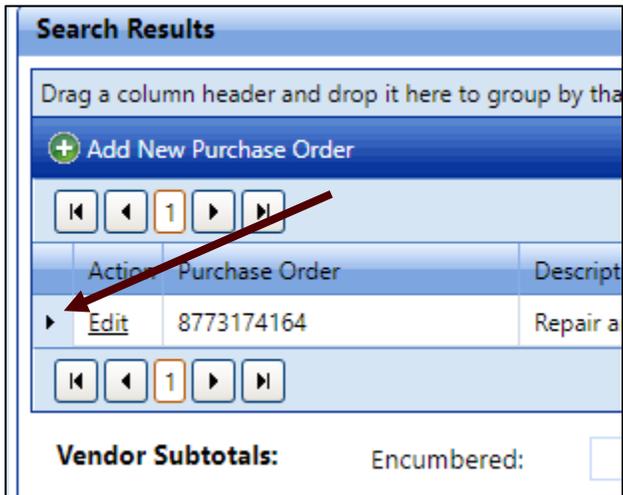
18. Select Add Budget Line Item.
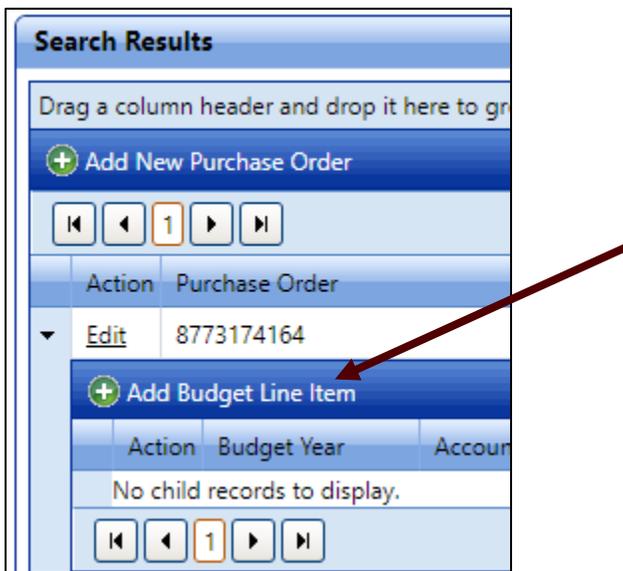
19. A new pop-up will appear.

20. For the Budget Line Item Account Number, select the **20202020 [Third Party – Repairs & Maintenance] [2020]**.

21. For the **Funded Amount**, enter **100,000,000,000.00** and the same for the **Max Purchase Limit**.

22. Click **Save**.

23. Your Vendor now has a PO with a budget line item to "charge" to when entering Sublet work for TFS vehicles and equipment.

3.4 How do I set contacts & alerts for a vehicle?

1. Select an asset and go to the **Contacts** tab.

2. Click on the **Add New Contact**. A new pop-up window will appear.
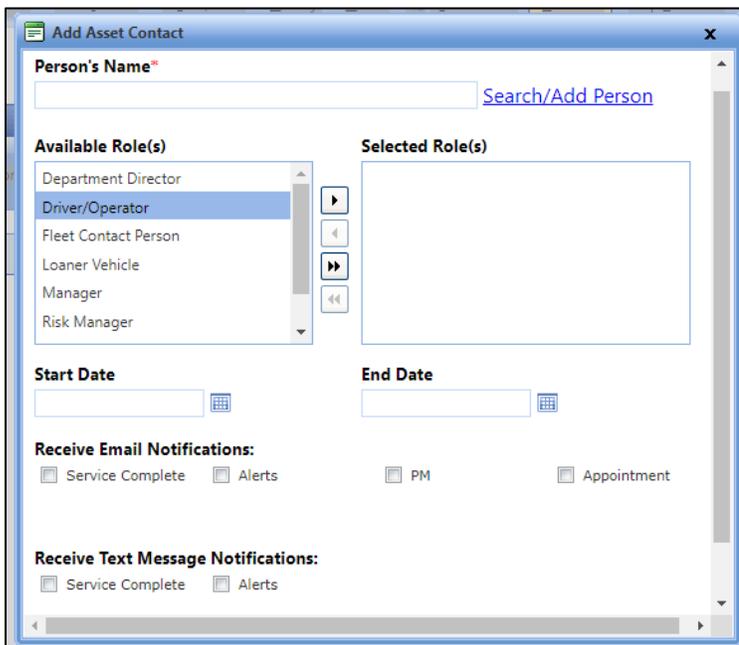
3. **Search** for your name of the person you want to add. Then select the role as appropriate. For example: **Driver/Operator**. Then click the arrow ▶ button to add the selected role. You can add multiple roles for a contact if needed. .

4. Select a **start date** and **end date**. For the end date, choose a date far in advance. This can be edited later.

5. Select the notifications under what method you wish to receive them. Not all options are available for both.

6. **Save** when finished.

7. You will return to the main Contacts tab screen, with what you entered now as a contact for that particular asset.

8. To remove contacts or to make edits, click the **Edit** link for that contact.

9. A person can be listed as a contact but not receive notifications. You can also have as many contacts for a vehicle as you need.

3.5 How do I sort & search for vehicles (assets)?

1. If you want to see all the vehicles you are responsible for. Under the ASSET tab, click on **Advanced Search**.
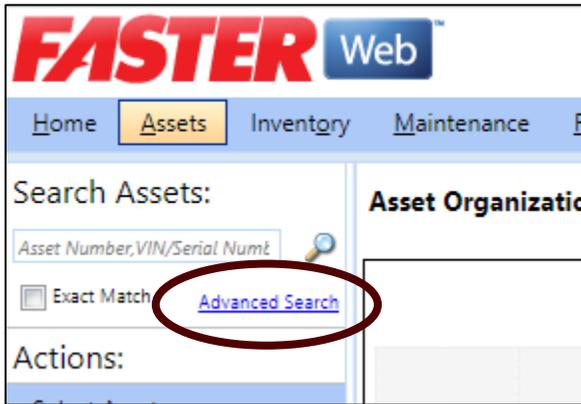
2. A new screen will appear. You may choose the Asset Organization, Department, "Asset Shop", "TFS Office" and / or "Other -> Usage" to narrow down vehicle choices.

3. To select one specific location - Select **IRD** for Department and **NORTHWEST BRANCH** for the Asset Shop. Then click the Search button.

4. To view multiple vehicles within a department and all "Assets Shops", drag the **Department** header, followed by the **Asset Shop** if needed.

3.6 How do I create a custom vehicle group?

To group vehicles together in FASTER, we'll use the "Usage" code system. To get started:

1. If your usage codes does not yet exist, go to The **Setup** tab and select **Fields** under Assets.

2. Then click view for the **Usage** Asset Field.
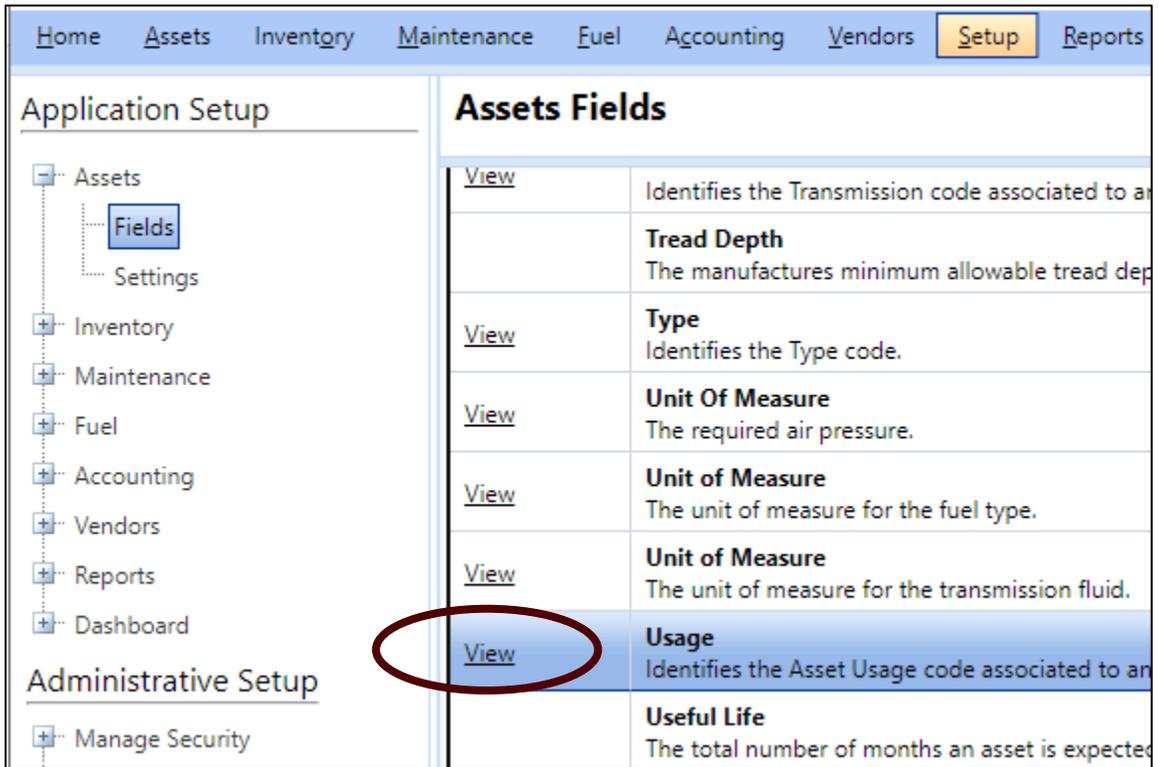
3. Once you are viewing the Usage pick list, click **Add New Item**.

4. Give your Usage a code and a **Description**.
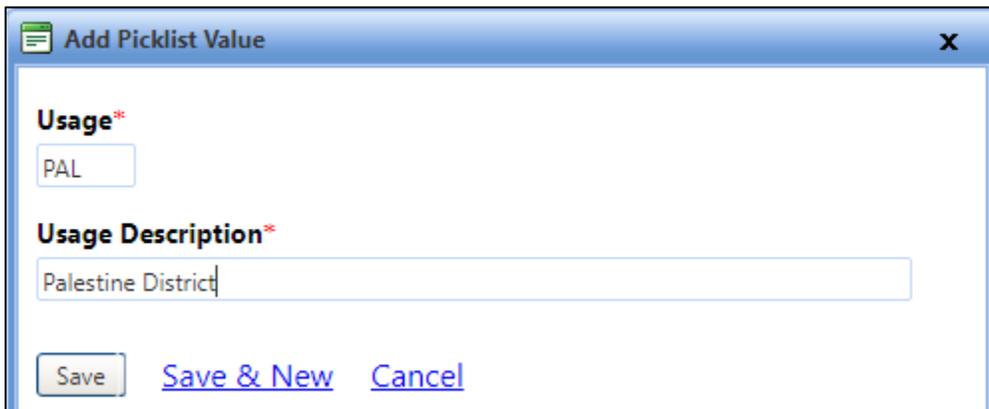
5. Now that we have our code, we need to add it to a vehicle. Go to Assets and search for your vehicle you want to add the usage code to.

6. Once you find your vehicle, click **Edit Identification**.

7. In the Edit Asset Identification window, scroll down to the Available Usage Codes section. Highlight the newly created usage code and click **Add >**.
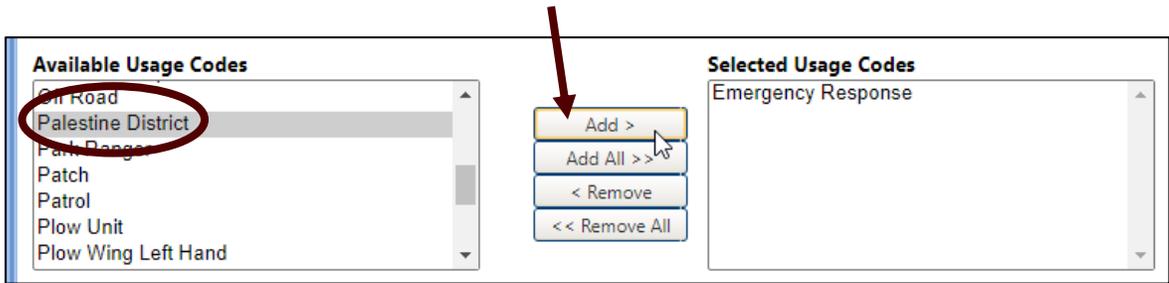
Pro Tip: You can select multiple usage codes by holding down the [Ctrl] key and clicking on additional usage codes. Then Click **Add >** to add the highlighted ones.

8. When finished, click **Save**.

9. Your added usage codes now appear in the right hand side of the **Master** asset tab.
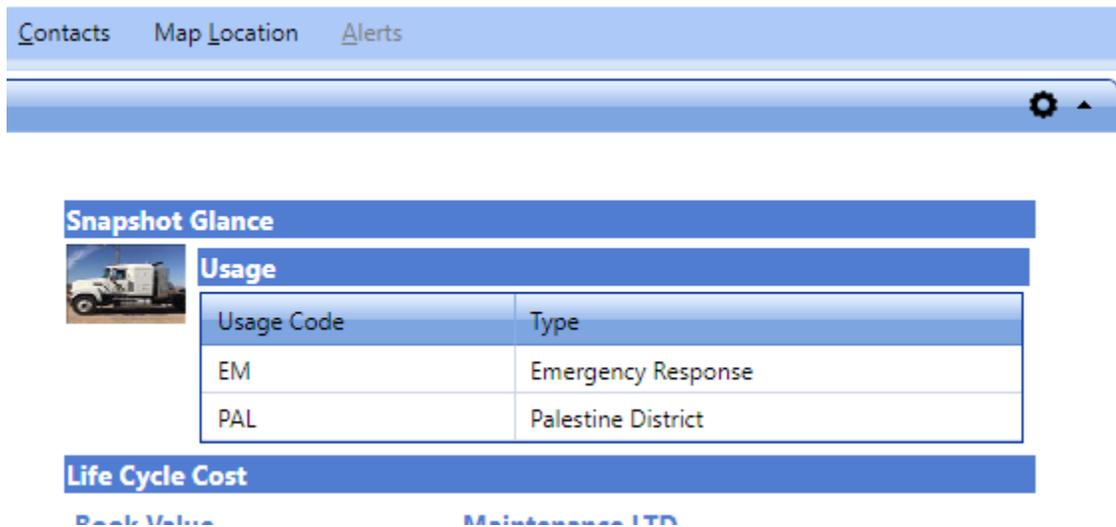
The benefit to adding vehicles to usage cods is you now have the ability to search for a set of vehicle by one or more usage code. When doing an advanced search, select Usage under Other and then choose your usage code.

Ex. Searching by the Palestine District usage code:

3.7 How do I see vehicle history?

1. With the **Maintenance** tab selected, click the **Advanced Search** link.

2. Next, enter the TFS **Asset number** and select **Active Fleet** for the Asset Organization, then click the **Search** button. If you don't choose Active Fleet (in the sandbox) then any asset with that number in any document or other sequence will pull up.

   Make sure to check the "Include Closed Work Orders" box.
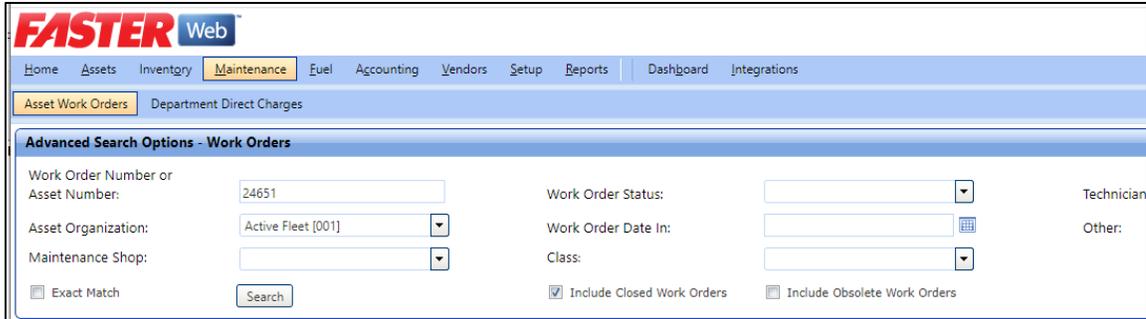
3. The updated window will show all Work Orders for that particular TFS Asset Number.
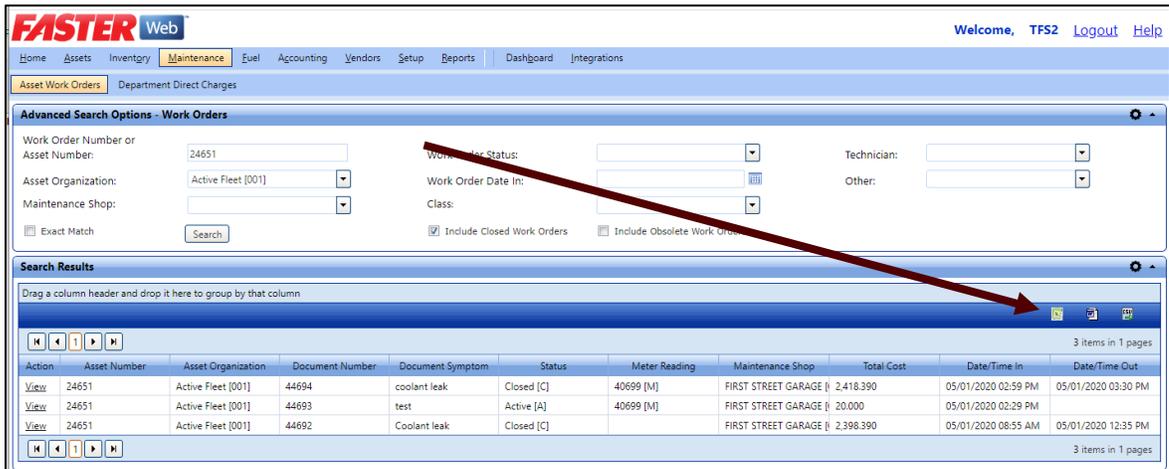
4. Note that you can then export this to Word or Excel.
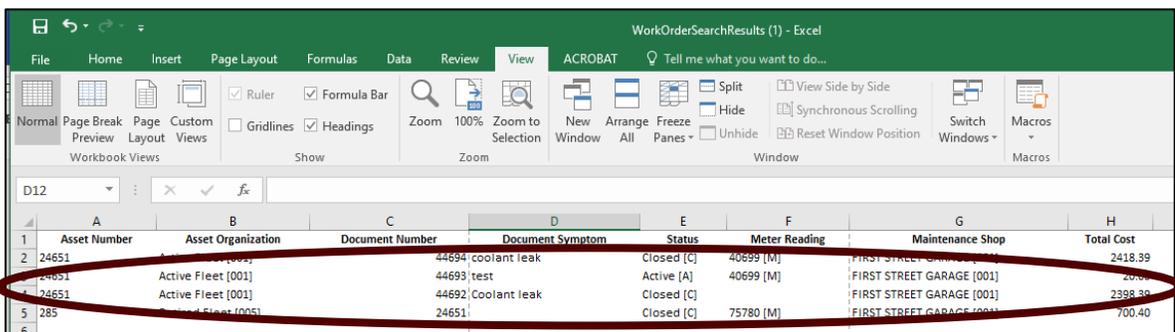
Note: this example shows what happens if you don't use the Asset Organization to filter. A retired piece of equipment that had a document with 24651 pulled up in the Work Order history.

5. You can also go to the **FASTER Portal**, type in the vehicle and go to the Repair History for a complete list but does not have an export function and you cannot see any of the attachments.

3.8 How do I enter a month ending odometer reading?

1. Search for the Asset and the Master File should open.

2. Click the **Meters, Warranties** tab.
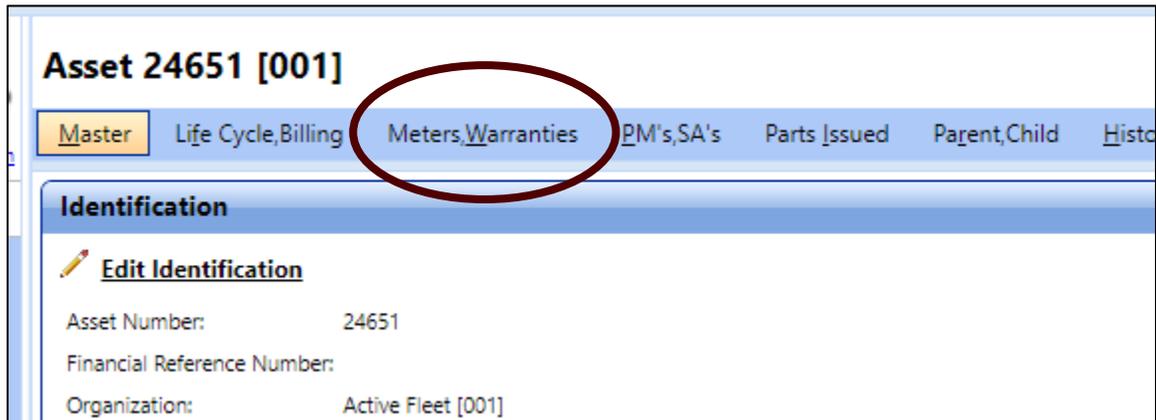
3. In the Meter section, click [▶] next to a meter record.
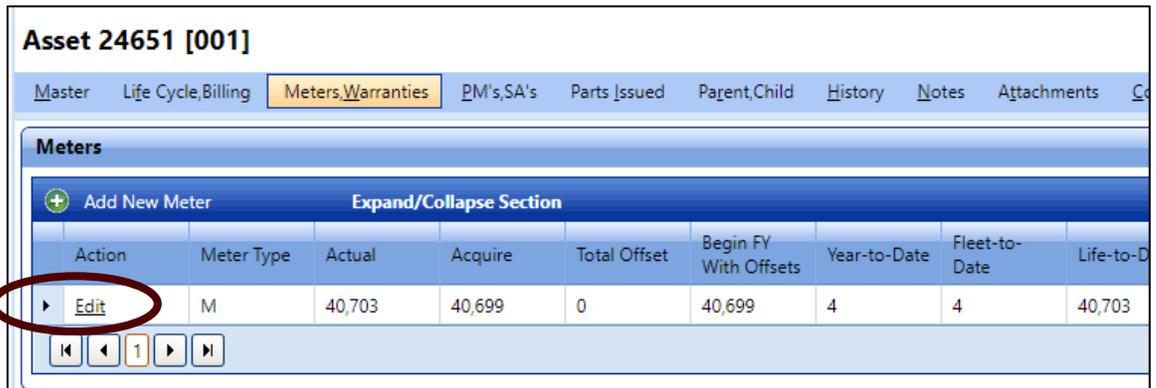
4. New rows will appear, click the **Add New Reading** link.

5. The **Add Meter Reading** dialog box opens.

6. In the **Reading** box, type the meter reading. Make up a number above the current.

7. In the **Date and Time** field, type the date and time in the MM/DD/YYYY HH:MM:SS AM/PM format, or select the date from the calendar and time from the clock.

8. When finished, click **Save**.

9. Your new Meter reading has been recorded.

10. You can still edit this if needed.

3.9 How do I verify & correct fuel log entries?

1. Click the **Fuel** tab and enter the **Asset Number**.
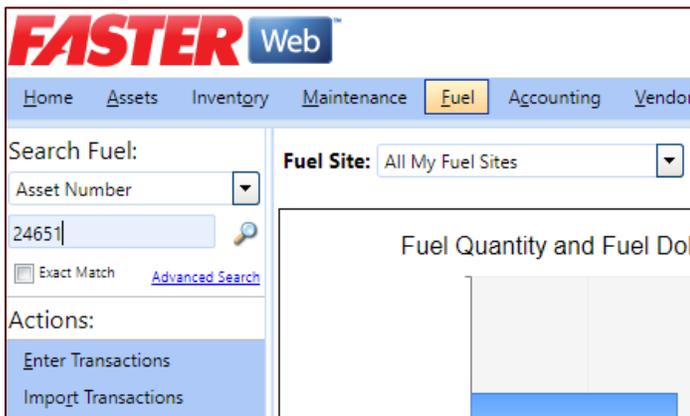
2. The new screen will show the fuel transactions.

3. To narrow the fuel transaction files to a specific time period, use the **Distribution Date From & To**. This should allow you to verify fuel logs.

4. To correct a fuel log, select **View**.

5. A new screen will appear.

6. From here you can manually ADD a new fuel log or EDIT the current selected.

7. To EDIT, click the **Edit this Fuel Transaction**.

8. Make the necessary corrections and click **Save**.

There will be times that you go to verify fuel log entries and some may be missing. Even though, FASTER is set to receive fuel logs daily from our fuel card vendor, there may be times when an entry is incorrect. FASTER automatically omits these entries to keep the data clean but you have a chance to find them, correct them and finish the import of the data.

If you find a fuel entry to be missing,

1. Navigate to Fuel -> Import Transactions -> Process Errors. Then expand the Voyager section.
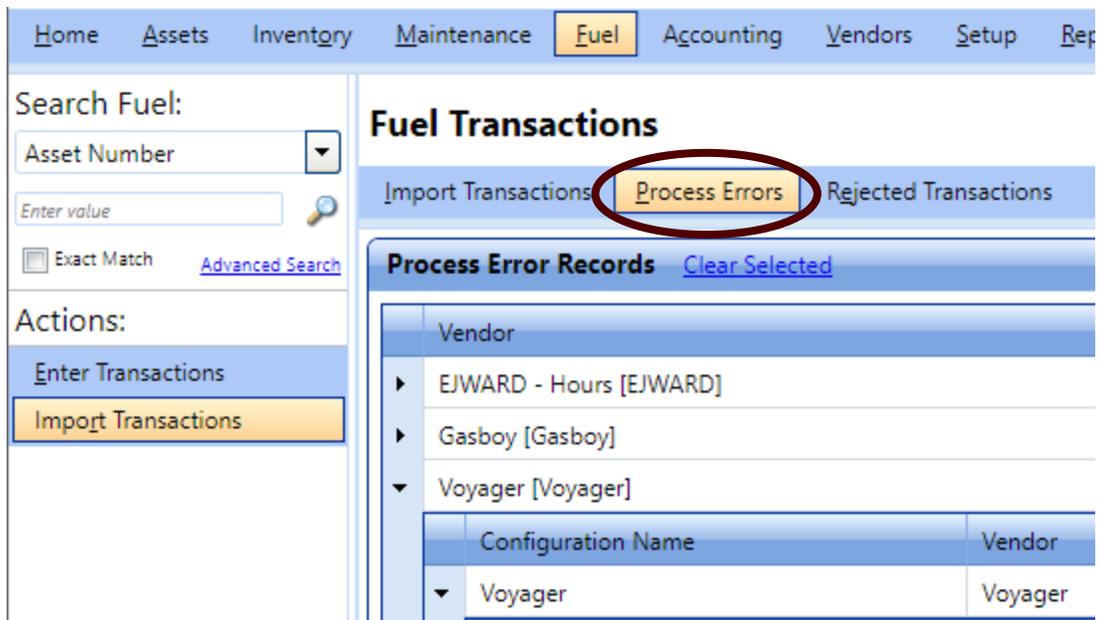
2. The best option here is to sort the table by Asset Number and look for the vehicle you are reconciling fuel logs for.

3. Once you find the entry or entries that belong to your asset, **Edit** them to fix whatever is wrong.

   Note: In most cases, the meter reading will be incorrect. Simply correct the entry and the line item will be automatically imported and disappear from the Process Errors list.

If all else fails and your fuel log entry is not found, simply **Add a New Fuel Transaction**.

3.10 What do I need to do when a new vehicle is transferred to my department / purview?

1. Update the <u>vehicle contact data</u> with who will be the operator or anyone else who needs fleet notifications for the vehicle.

2. Update the <u>Usage Codes</u> for the vehicle if applicable.

3. (Not part of FASTER): Be sure to complete a Property Transfer Record (PTR) for the vehicle to transfer it into the appropriate inventory.

   FASTER will receive regular updates from FAMIS inventory so as long as the PTR is done, things like location, department, etc. should update automatically.

4.0 Vehicle Operators (Drivers)

The following are likely questions and steps

4.1 How do I create a Work Order?

The steps for creating a Work Order are the same for everyone. See, Section 2.2.

4.2 How do I report maintenance or a repair performed by me?

The steps for reporting maintenance or a repair are the same for everyone.

1. First, create a Work Order. See Section 2.2

2. Then report maintenance or a repair. See Section 2.3 and Section 2.4 respectively.

4.3 How do I report a third-party (sublet) maintenance or repair?

The steps for reporting sublet work is the same for everyone. See Section 2.5.

4.4 How do I attach a quote (or other files) to a Work Order?

The steps for attaching files to a Work Order is the same for everyone. See Section 2.6.

4.5 How do I enter my monthly vehicle / equipment inspection forms?

1. Create a Work Order for the vehicle you recently did a monthly inspection on. Enter the Symptom as "Monthly Inspection – Month Year".

2. Go to the "**Attachments** tab of the Work Order and click "Add New Attachment".
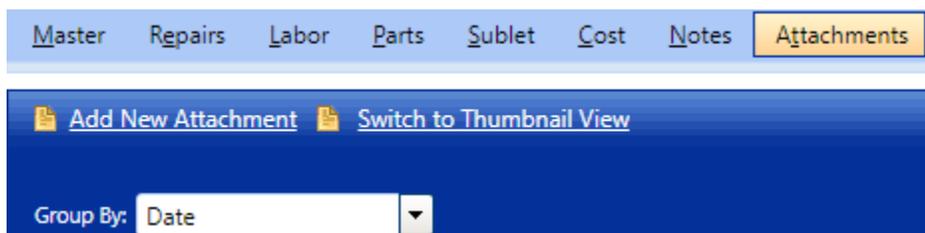
3. Then upload a scanned copy of your monthly inspection report and choose the **category** of Inspection Report.

4. Click **Attach File**.

5. TBD: We will need to complete a "Repair" entry at this point to satisfy the scheduled actions but that exact How To is still being determined. We'll update guides and training accordingly.

6. Go back to the **Master** tab and click Edit Identification.

7. Change the Status to Closed [C].

8. Click **Save & View**.

4.6 How do I get notifications & alerts?

A vehicle operator should check with their vehicle coordinator to make sure they are set up to receive alerts for their vehicle(s).

4.7 How do I request vehicle maintenance or repairs with a TFS shop?

1. Login to : https://fleet.tfs.tamu.edu/FASTER/portal/login/Login.aspx using your TFSHQ1\ credentials.

2. Enter the asset number or License Plate, for this exercise use 24651 for the asset.

3. A new window will appear, you can choose either **Appointment** or **Request Service**.

Creating an Appointment

1. Click the **Appointment** action and then ⊕ Create Appointment link.
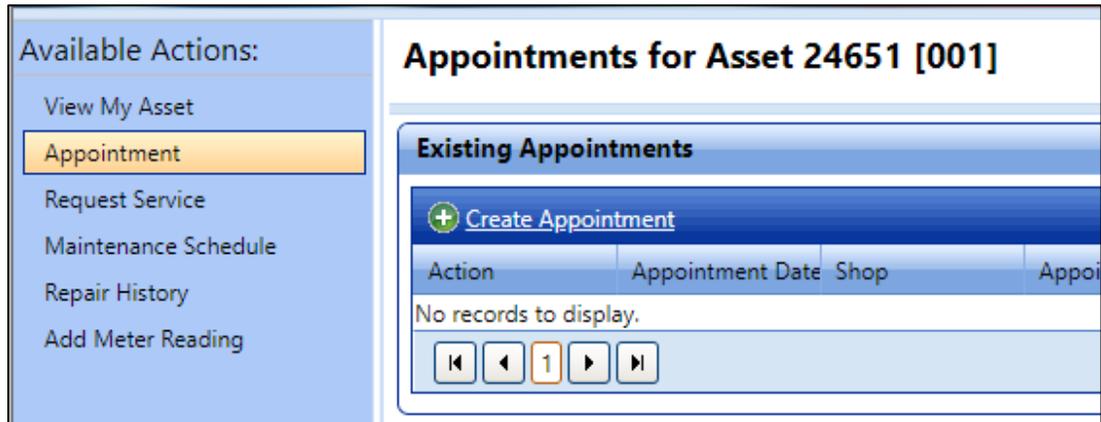
2. A new pop-up window will appear. Begin filling in the required fields, make up info as you go.
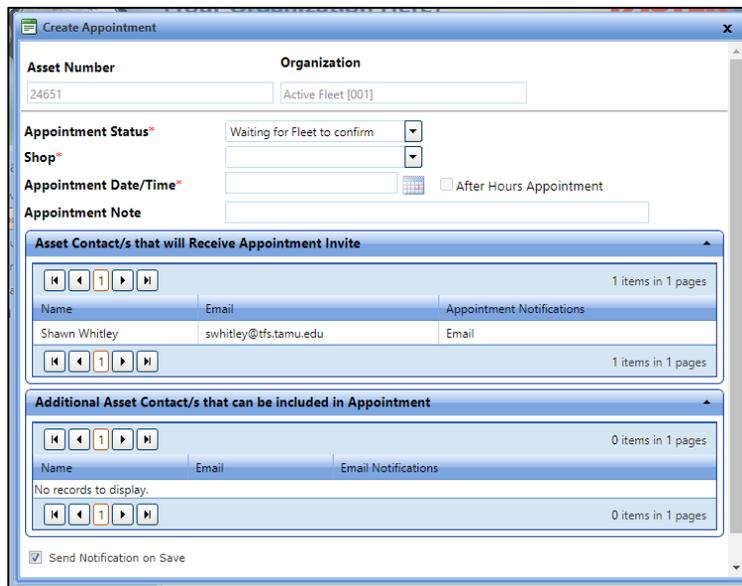
3. Notice that your email address should be pre-populated from when you previously added yourself to the **Asset Contacts**.

   IF the asset has other contacts listed in FASTER Web, they will appear below yours. Complete the required fields and click the **Save** button.

4. Your Appointment page for Asset 24651 will be updated with the date/time you picked. Note that the Appointment <u>Status must still be confirmed</u>, this would be by a TFS Shop like Hudson.

Appointments for Asset 24651 [001]

Existing Appointments

⊕ Create Appointment

Action	Appointment Date/Time	Shop	Appointment Status
Confirm Edit	6/10/2020 7:45:00 AM	FIRST STREET GARAGE [001]	Waiting for Fleet to confi

5. After creating the appointment, you should receive an email of the "scheduled" appointment. If the appointment changes time, date, is canceled or confirmed you will receive an updated email.
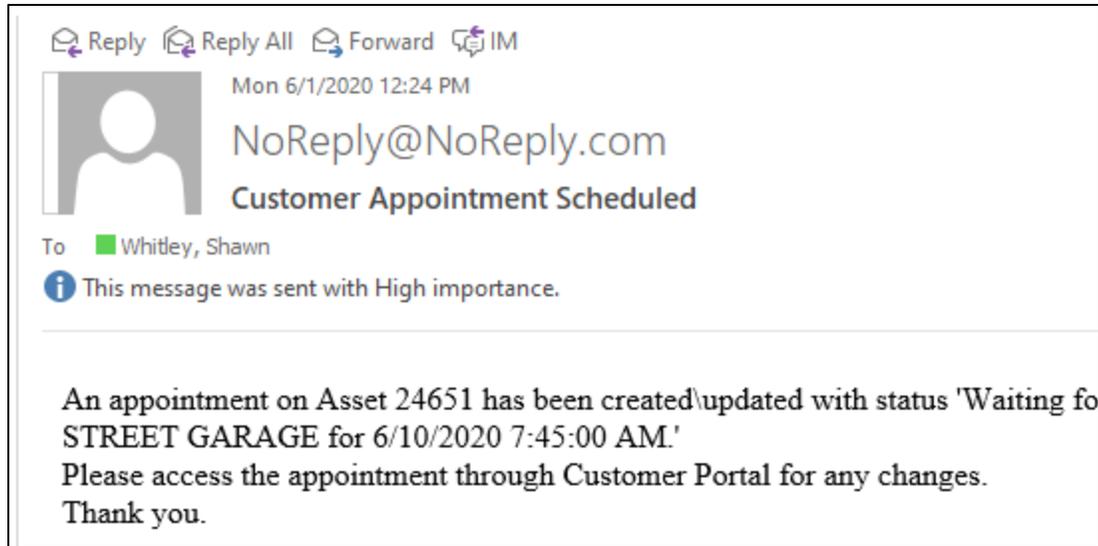
6. Creating an appointment in no way guarantees that the shop ("Fleet") is available.

Requesting Service

1. Click the Request Service tab and enter all possible information.

2. Note that if you have previously requested an appointment or the Shop created one for you, then you can select that at the **Your Upcoming Appointment(s)**.

3. After submitting your request a pop-up box should say Add Successful. However if a repair for the same issue has already been requested for that asset number the message below will also appear.
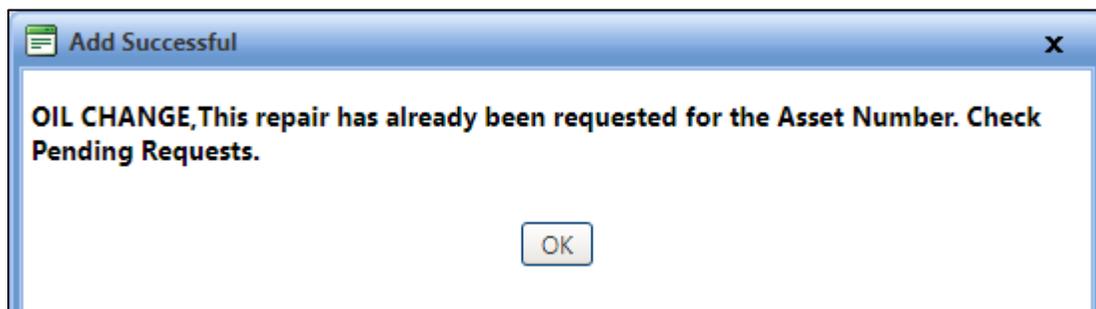
4. Next you will receive an email for the Service Request.

Wed 6/3/2020 3:58 PM

fleetadmin@yourorg.com

Requesting Repairs - Shop Floor Manager

To   ▪ Whitley, Shawn

ℹ This message was sent with High importance.

Thank you for submitting your request for service on your 2014 MACK CHU613.
We will contact you shortly to schedule your repair.

It is our goal to meet your request in a timely manner that is acceptable to you, our customer.

Thank you,
Your Org
Fleet Services
(555) 555-555

5. The Shop ("Fleet") will still have to confirm the appointment.

5.0 Site Coordinator (Payroll)

5.1 How do I get PM & Repairs reports?

FASTER has a multitude of built in reports. To get to the PM and repairs reports, simply click on the **Reports** tab and select the report W300d – Work Order Details by Date.
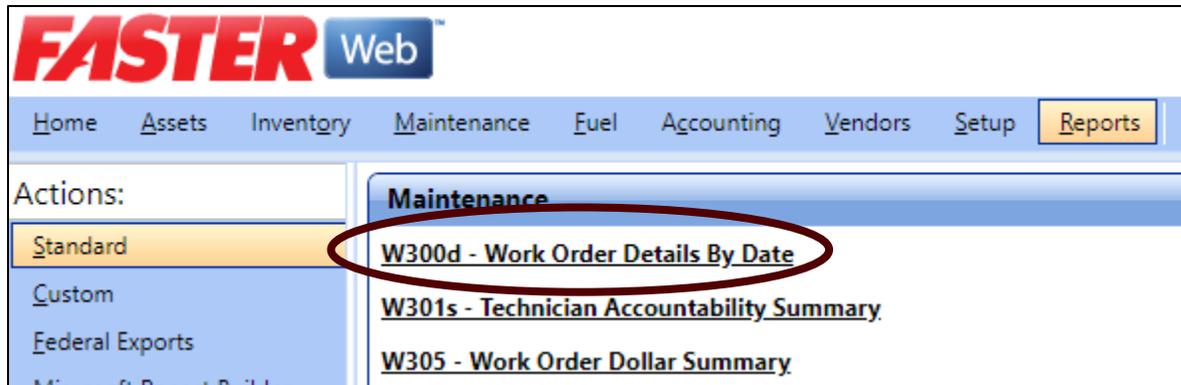
These reports are for getting data at a point in time. IR will be working with FASTER to automate the export of PM & Repair data in a format easily digestible to upload to the State fleet reporting system on a regular basis.

5.2 How do I get monthly ending odometer readings?

To get to the monthly ending odometer reading reports, go to the **Reports** tab and select the W104 Asset Meter Report.
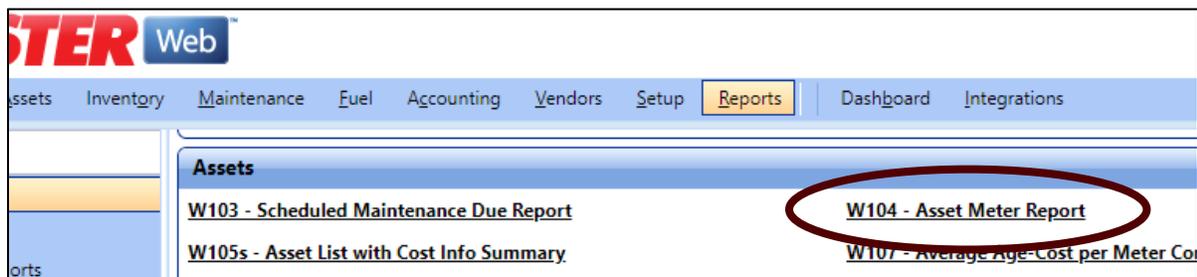
These reports are for getting data at a point in time. IR will be working with FASTER to automate the export meter readings in a format easily digestible to upload to the State fleet reporting system on a regular basis.

5.3 How do I get the master fuel log report?

To get to the master fuel log report, go to the **Reports** tab and select the W400 – Fuel Transaction Report.
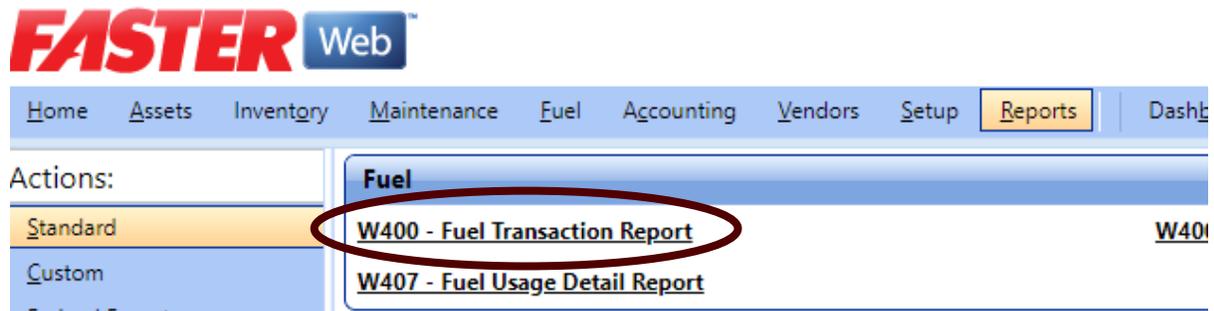
These reports are for getting data at a point in time. IR will be working with FASTER to automate the import and export of fuel log data in a format easily digestible to upload to the State fleet reporting system on a regular basis.

5.4 How do I get new vehicles & assets into FASTER?

1. To create a single new asset, under the **Asset tab** click on **Create Assets**.
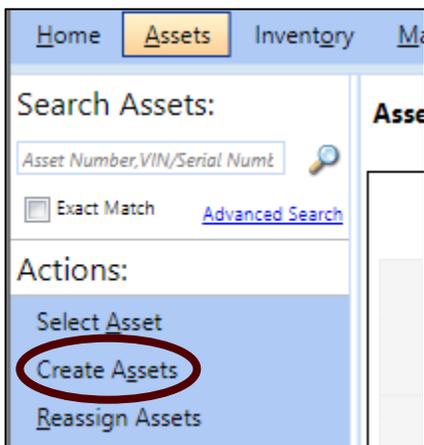
2. A new pop-up window will appear, enter in as much information as possible.

Note: Many of the primary fields are required. The asset number should be the six digit red tag number of the asset including the leading "0".

Ex. 024651

Some of the fields below are optional but as many as possible should be filled out to better help identify the vehicle later.

3. When completed, click the **Save & View Asset** button.

4. A new window will appear with the information you entered.

5. The vehicle asset image can be added here by clicking the **Edit Identification**.

6. Additional vehicle specifications and PMs can be added here.

6.0 Task Forces

All of the tasks that task force personnel should need to do in FASTER can be found in various other sections of this document.

6.1 How do I enter my monthly vehicle / equipment inspection forms?

See Section 4.5

6.2 How do I see maintenance history?

See Section 3.7.

6.3 How do I pass on vehicle maintenance history to others when a vehicle is transferred?

You don't have to do anything. As long as all work order activity has been done in FASTER, the next department will have instant access to all records. Other than completing a PTR, no electronic transfer in FASTER is required.

The receiving Vehicle Coordinator should take steps to update vehicle contact and notification data.

7.0 Managers

7.1 How do I see vehicle cost history?

1. Enter the TFS asset number or the VIN under **Search Assets**.
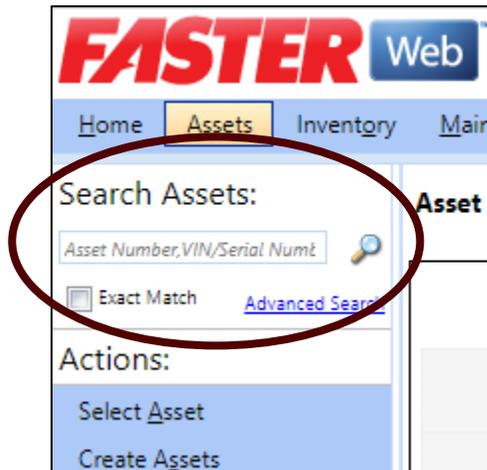
2. This next window will appear, click on **History**

3. This new window will appear with all history for the Calendar Year.

Asset 24651 [001]

Master Life Cycle,Billing Meters,Warranties PM's,SA's Parts Issued Parent,Child History Notes Attachments Contacts Map Location Ale

Year	Reporting Year Style	Meter Type
2020	Fiscal Year	M

Show History   ☐ Include Warranty Costs in the Repair Costs

Year	Total Maint	Maintenanc	Repair	Accident	Capital	Warranty	Fuel Cost	Fuel Qty	Meter Drive	Idle Hours	Cost/Meter	Meter/Gallo
2020	4,836.780	0.000	4,836.780	0.000	0.000	0.000	0.000	0.000	0	0.00	0.000	0.00
Life To Date	4836.780	0.000	4836.780	0.000	0.000	0.000	0.000	0.000	40699	0.000	0.119	0.00

4. Next click on the triangle next to the year of interest.

5. This will expand the section where monthly costs are further broken down.

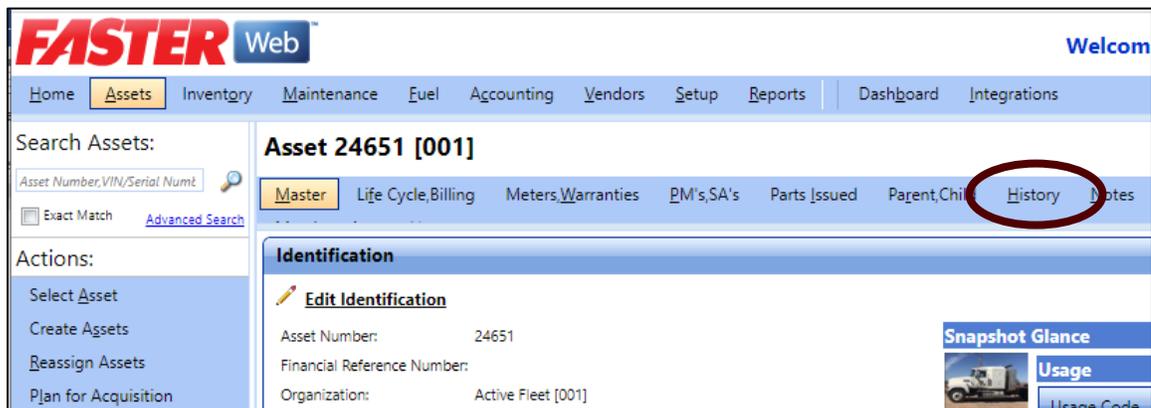| Year	Total Maint	Maintenanc	Repair	Accident	Capital	Warranty	Fuel Cost	Fuel Qty	Meter Drive	Idle Hours	Cost/Meter	Meter/Gallo	Labor	Parts
2020	4,836.780	0.000	4,836.780	0.000	0.000	0.000	0.000	0.000	0	0.00	0.000	0.00	0.000	0.0
Month	Total Maint	Maintenanc	Repair	Accident	Capital	Warranty	Fuel Cost	Fuel Qty	Meter Drive	Idle Hours	Cost/Meter	Meter/Gallo	Labor	Parts
January									0	0.00				
February									0	0.00				
March									0	0.00				
April									0	0.00				
May	4,836.780	0.000	4,836.780	0.000	0.000	0.000	0.000	0.000	0	0.00	0.000	0.00	0.000	0.0
June									0	0.00				
July									0	0.00				
August									0	0.00				
September									0	0.00				
October									0	0.00				
November									0	0.00				
December									0	0.00				
FY To Date	4836.780	0.000	4836.780	0.000	0.000	0.000	0.000	0.000	0	0.00	0.000	0.00	0.000	0.0
Life To Date	4836.780	0.000	4836.780	0.000	0.000	0.000	0.000	0.000	40699	0.000	0.119	0.00	0.000	0.0

6. There is a **Life To Date** row, this will help managers decide on prioritizing vehicle or equipment replacements.

8.0 Contacts

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