

# UMS User Guideline

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## Version Control

| Version | Date | Comments |
|---------|------|----------|
|---------|------|----------|

|     |                 |  |
|-----|-----------------|--|
| 1.0 | 18 October 2022 | Vanessa Byrne A/Manager Business Systems |
|-----|-----------------|--|

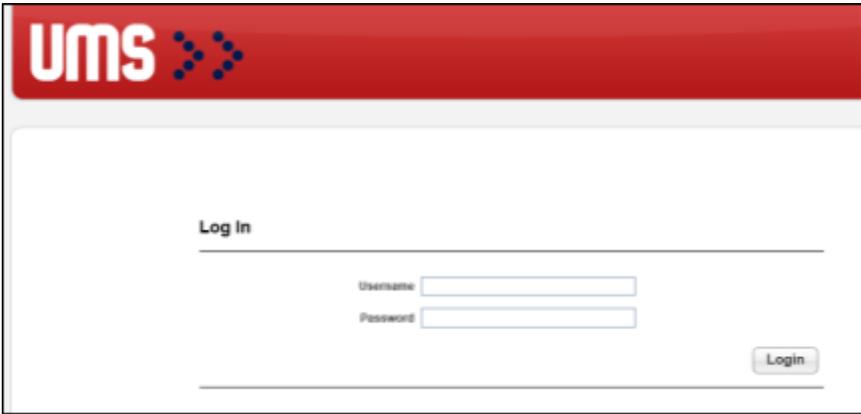
# 1. Guideline

## 1.1 Introduction

This user manual contains all essential information for a user to make full use of the UMS application, including step-by-step processes and graphics where possible.

## 1.2 Getting Started

### 1.2.1 Logging In



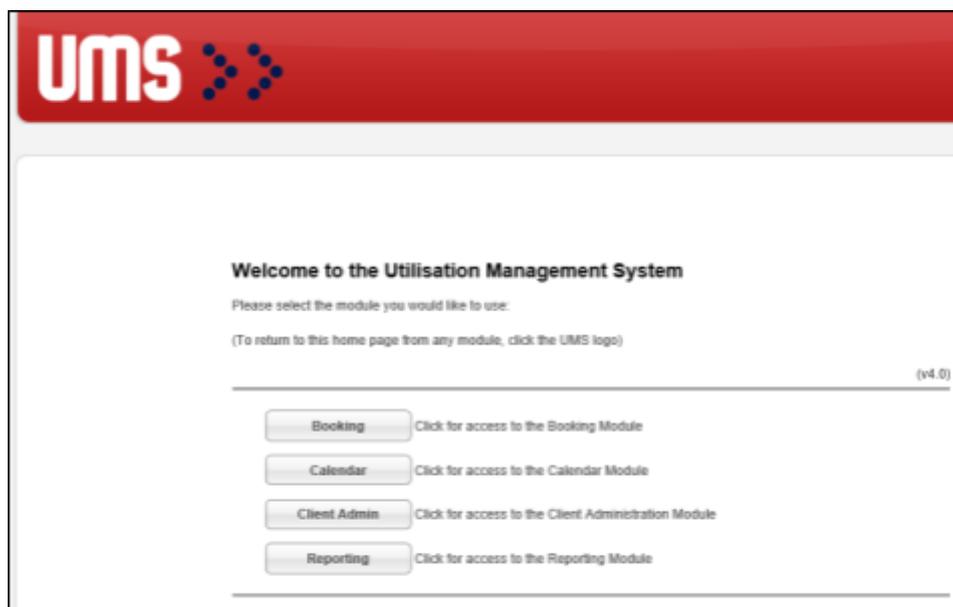
The screenshot shows the UMS login interface. At the top, there is a red header with the 'UMS' logo. Below the header, the text 'Log In' is centered. There are two input fields: 'Username' and 'Password'. A 'Login' button is located at the bottom right of the form area.

- Access to the UMS application is granted through the login screen (above).
- To login enter your assigned username and password into the fields provided, and then click on the Login button.
- The modules made available on the Home page are dependent on the privileges allocated to your user account.

### 1.2.2 Logging Out

- To logout of the UMS application click on the “Log out” button provided in the top right corner of the screen

## 1.2.3 Home Page



- Click on the provided buttons to navigate to the required module (above).
- Navigation back to the home page from any module can be done by clicking on the 'UMS' logo found in the header.

## 1.2.4 UMS Modules

The UMS application is made up of four modules:

1. The Booking Module
2. The Calendar Module
3. The Client Administrator Module
4. The Reporting Module

### 1.2.4.1 Booking Module

The Booking Module is used for the creation of booking requests. This module is typically accessed by drivers who require the use of a pool vehicle and need to create a booking request.

### 1.2.4.2 Calendar Module

The Calendar Module is used for the allocation of vehicles to bookings as well as the management of allocated bookings. This module is typically accessed by a person who is responsible for the allocation of vehicles to bookings and the management of these vehicle bookings.

### 1.2.4.3 Client Administrator Module

The Client Administration Module is used for the setup of user, vehicle, PMO, pool and pricing model data used in the UMS application. This module is typically accessed by an administrator or the person who is responsible for the client's data.

### 1.2.4.4 Reporting Module

The Reporting Module is used to generate various reports on vehicles, bookings and users. This module is typically accessed by an administrator or the person who is responsible for the client's data.

## 1.2.5 UMS User Roles

The user roles determine which modules the user has access to. These roles are allocated at user creation or modification stage and a user can be assigned more than one role.

The user roles are:

- Driver
- PMO Officer or PMO Manager
- Client Administrator

### 1.2.5.1 Driver

| Application                  | Access |
|------------------------------|--------|
| Booking Module               | Y      |
| Calendar Module              | N      |
| Reporting Module             | N      |
| Client Administration Module | N      |

A user with the "Driver" role will only have access to the Booking Module. The user can create bookings for themselves or for other users within their department. The user is also able to modify or cancel bookings made in their name.

### 1.2.5.2 PMO Officer

| Application                  | Access |
|------------------------------|--------|
| Booking Module               | N      |
| Calendar Module              | Y      |
| Reporting Module             | N      |
| Client Administration Module | N      |

A user with the “PMO Officer” role will have limited access to the Calendar Module. A user with this role will be able to:

- View the PMO and pools they are assigned to.
- Check out a vehicle booking.
- Check in a vehicle booking.
- Adjust the odometer reading of the primary driver.

### 1.2.5.3 PMO Manager

| Application                  | Access |
|------------------------------|--------|
| Booking Module               | N      |
| Calendar Module              | Y      |
| Reporting Module             | N      |
| Client Administration Module | N      |

A user with the "PMO Manager" role will have full access to the Calendar Module. A user with this role will be able to:

- View all PMO’s and pools for their department.
- Create a booking.
- Allocate a vehicle to a booking.
- Check out a vehicle booking.
- Check in a vehicle booking.
- Amend a vehicle booking.
- Cancel a vehicle booking.
- Change the vehicle allocated to a booking.
- Complete a vehicle booking.
- Move vehicles in and out of pools.
- Adjust the odometer reading and times of the Primary driver.

### 1.2.5.4 Client Administrator Module

| Application                  | Access |
|------------------------------|--------|
| Booking Module               | N      |
| Calendar Module              | N      |
| Reporting Module             | Y      |
| Client Administration Module | Y      |

A user with the "Client Administrator" role will have access to the Client Administrator and Reporting Modules. The Client Administrator Module is used to setup all the required data for UMS. A user with this role will be able to:

- Create, modify and delete users.
- Create vehicles
- Set primary drivers for vehicles.
- Set pricing models for vehicles.
- Create, modify and delete PMO's.
- Create, modify and delete pools.
- Assign vehicles to pools.
- Remove vehicles from pools.
- Create, modify and delete pricing models.

| Application                  | Access |
|------------------------------|--------|
| Booking Module               | N      |
| Calendar Module              | N      |
| Reporting Module             | Y      |
| Client Administration Module | Y      |

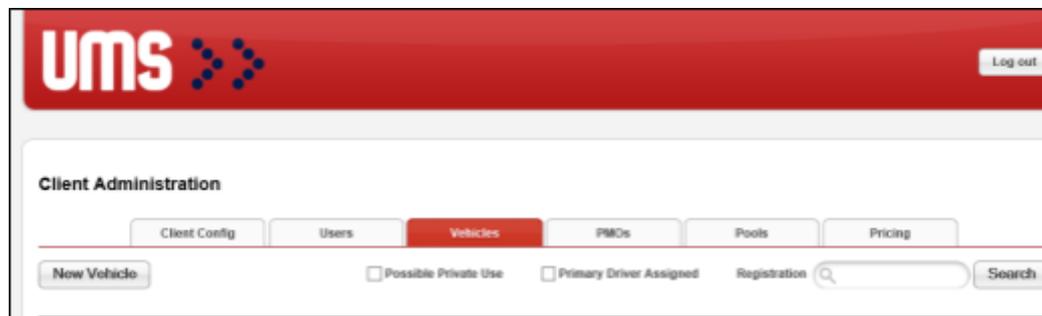
The Reporting Module is used to generate reports on users, vehicles and booking details.

You need client administrator access to access the reporting module

## 1.2.6 Vehicle Administration

### 1.2.6.1 Creating a New Vehicle

- A vehicle can be created by clicking on the 'Vehicles' tab.



The screenshot shows the UMS Client Administration interface. The top navigation bar is red with the UMS logo and a 'Log out' button. Below the navigation bar, the 'Client Administration' section is visible, with tabs for 'Client Config', 'Users', 'Vehicles' (selected), 'PMOs', 'Pools', and 'Pricing'. A 'New Vehicle' button is located on the left, and a search bar with a 'Search' button is on the right. There are also two checkboxes: 'Possible Private Use' and 'Primary Driver Assigned'.

- Click on the OK button to save the new vehicle record.

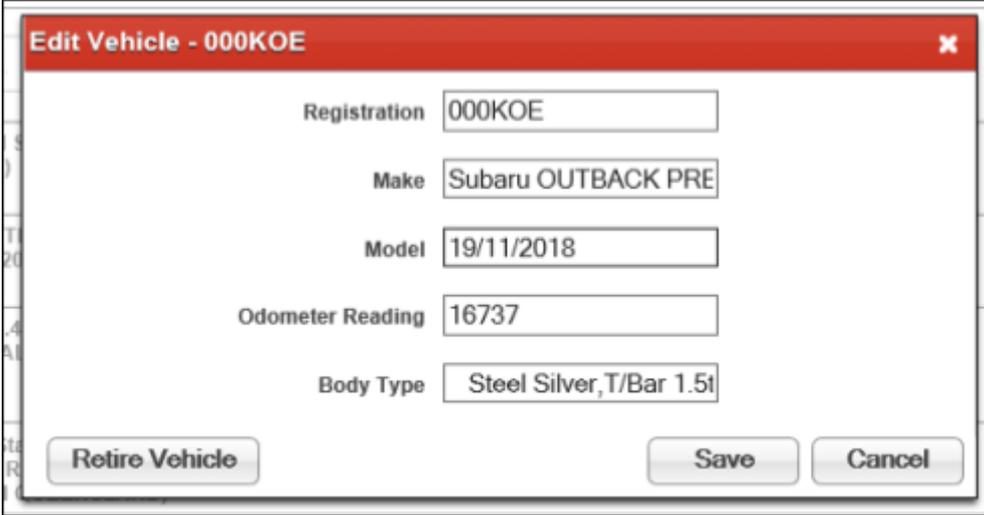


The screenshot shows the 'New Vehicle' dialog box. It has a red header with the title 'New Vehicle' and a close button (X). The form contains five input fields: 'Registration', 'Make', 'Model', 'Odometer Reading', and 'Body Type'. At the bottom right, there are two buttons: 'Save' and 'Cancel'.

- Click on the Cancel button to return to the Vehicle Admin screen without saving any changes

### 1.2.6.2 Searching for/Modifying Vehicles

- Vehicles can be searched on and modified in the Vehicles tab
- Vehicle search can be filtered by private use, assigned primary driver and registration number



**Edit Vehicle - 000KOE**

Registration: 000KOE

Make: Subaru OUTBACK PRE

Model: 19/11/2018

Odometer Reading: 16737

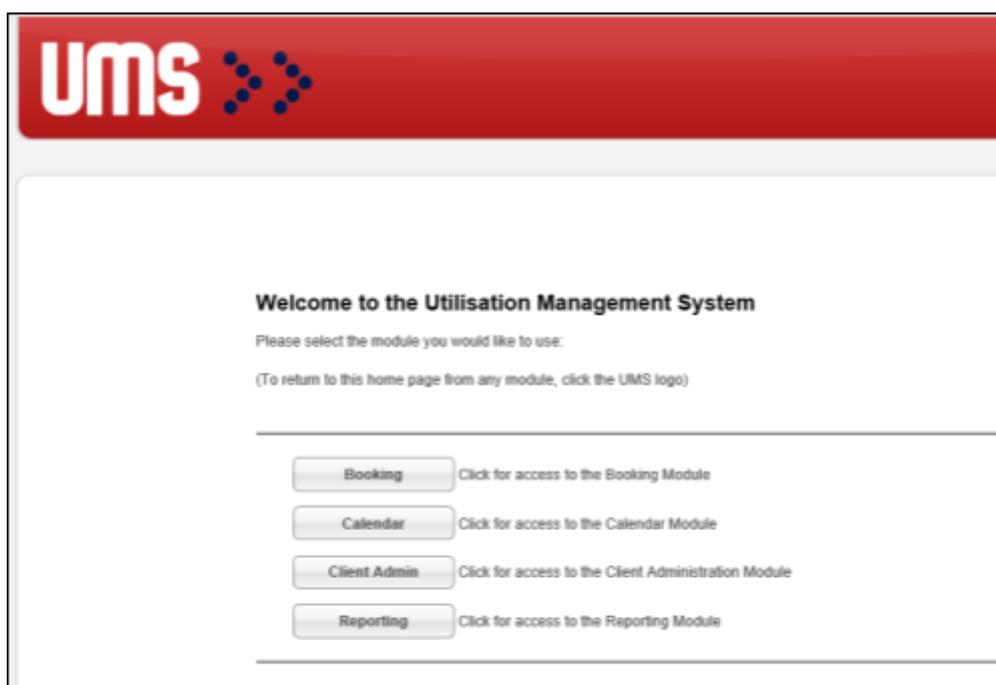
Body Type: Steel Silver, T/Bar 1.5t

Buttons: Retire Vehicle, Save, Cancel

- A vehicle can be modified by using the search functionality to search for it.
- Hover over the vehicle details and select the edit details button and the Edit Vehicle popup will appear (above)
- A vehicle can also be retired using the Retire Vehicle button in the Edit Vehicle popup

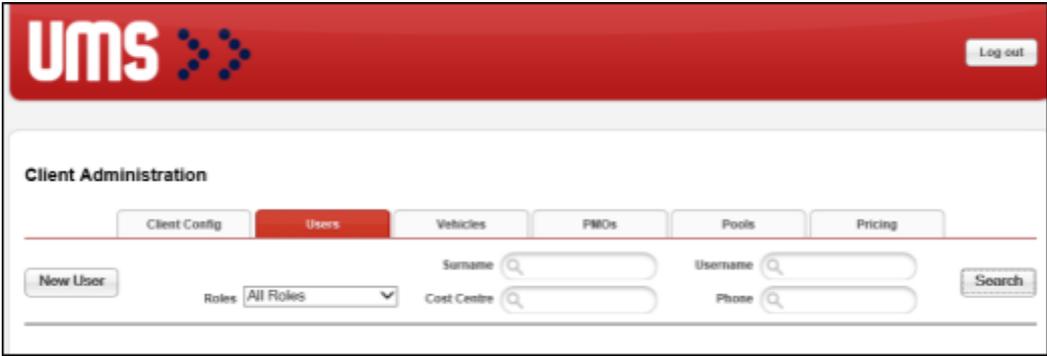
## 1.3 Client Administration

To navigate to the Client Administration module, click the Client Admin button from the home page.



## 1.3.1 User Administration

To navigate to User Administration, select the user tab



The screenshot displays the UMS Client Administration interface. At the top, there is a red header with the UMS logo and a 'Log out' button. Below the header, the 'Client Administration' section is visible, with several tabs: 'Client Config', 'Users' (which is highlighted in red), 'Vehicles', 'PMOs', 'Pools', and 'Pricing'. Under the 'Users' tab, there is a 'New User' button on the left. To its right, there is a search form with a dropdown menu for 'Roles' (set to 'All Roles'), a 'Cost Centre' field, and four search input fields for 'Surname', 'Username', 'Phone', and 'Search'. Each search field has a magnifying glass icon.

### 1.3.1.1 User Search

- The Users tab provides functionality to search for a required user. This functionality can be found along the top of the Users tab.
- A user can search on the surname, a user role, the users' assigned cost centre username and phone.

### 1.3.1.2 User Vs Walk Up Only

- A user is a regular staff member who will have a username and password and be able to login to UMS.
- A walk-up only user is a volunteer, temporary staff member or a driver who will NOT have a username and password and thus will NOT be able to login to UMS.

### 1.3.1.3 Creating a New User

- Click on the New User button.
- A New User popup will appear. Select "User" option and enter the required fields.
- Users can not have both PMO Manager and PMO Officer roles. If a user needs access to the Calendar, they will only have ONE of these roles.
- Click on the OK button to save the new user.
- Click on the Cancel button to return to the Users Tab without saving any changes.

The screenshot shows a 'Create New User' dialog box with a red header and a close button. Below the header, it says 'Fields marked with \* are required.' There are two radio buttons: 'User' (selected) and 'Walk-up only'. Below these are several text input fields: 'Title \*', 'First name \*', 'Surname \*', 'Employee Number \*', 'Phone \*', 'Login (email) \*', 'Password \*', and 'Password Confirmation \*'. There is also a 'Default Cost Centre \*' field. Below these is a checkbox for 'Can Make External Bookings \*' and a dropdown menu for 'Assigned PMO \*' with the text 'Select a PMO...'. At the bottom, there are four checkboxes for roles: 'Driver', 'PMO Officer', 'PMO Manager', and 'Client Administrator'. At the very bottom right are 'OK' and 'Cancel' buttons.

### 1.3.1.4 Creating Walk up Only Users

- Click on the New User button.
- A New User popup will appear. Select “Walk-up only” option and enter the required fields.
- Click on the OK button to save the new walk-up user.
- Click on the Cancel button to return to the Users Tab without saving any changes.

This screenshot is similar to the first one, but the 'Walk-up only' radio button is selected. The 'User' radio button is now unselected. The 'Assigned PMO \*' dropdown menu is also visible. The 'Can Make External Bookings \*' checkbox and the role checkboxes are not visible in this view, suggesting they are only shown for the 'User' option.

### 1.3.1.5 Modifying Users

- Using the provided search criteria, search for the required user.
- Select a user by clicking on the required user record (hovering the cursor over the user will highlight the record).
- A Modify User popup will appear where the user is able to make the required modifications.
- Click the OK button to save the changes made to the user.
- Click the Cancel button to return to the Users tab without saving any changes.

Modify User Details

Fields marked with \* are required.

Title \* Mr

First name \* John

Surname \* Smith

Phone \* 0400999888

Login (email) \* smithj@demo.com

Password \* \*\*\*\*\*

Password Confirmation \* \*\*\*\*\*

Default Cost Centre \* CC123

Assigned PMO \* Demo PMO

Roles \*

- Driver
- PMO Officer
- PMO Manager
- Client Administrator

Retire User OK Cancel

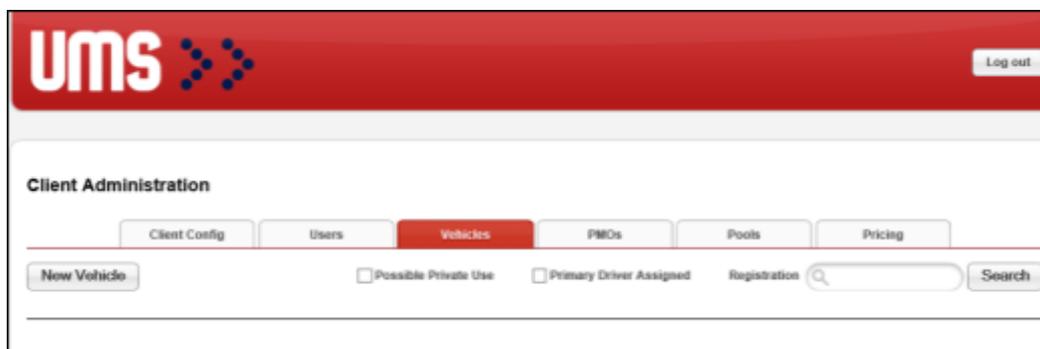
### 1.3.1.6 Deleting Users

- Using the provided search criteria, search for the required user.
- Select a user by clicking on the required user record (hovering the cursor over the user will highlight the record).
- A Modify User popup will appear
- Click the Retire User button.
- A warning popup will appear confirming the deletion of the selected user
- Click the OK button to delete the selected user.
- Click the Cancel button to return to the Modify user popup without deleting the selected user.



## 1.3.2 Vehicle Administration

To navigate to the Vehicle Administration, click the Vehicles tab



### 1.3.2.1 Vehicle Search

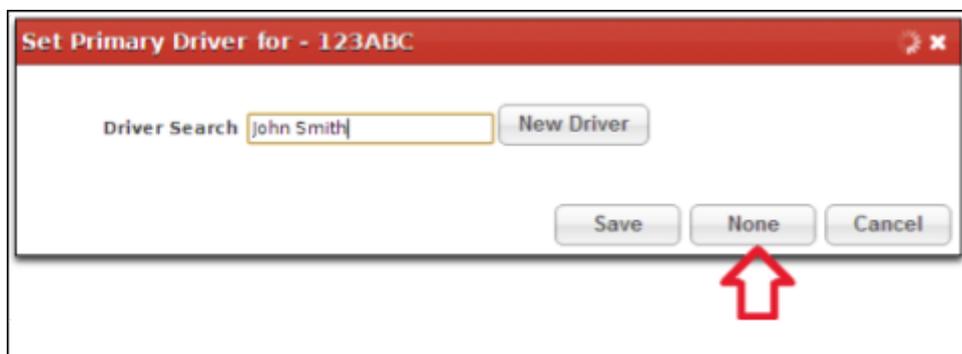
- The Vehicles tab provides functionality to search for a required vehicle. This functionality can be found along the top of the Vehicles tab.
- A user can search on the registration, whether the vehicle can be used privately and whether the vehicle has a primary driver assigned.

### 1.3.2.2 Allocating a Primary Driver

- Using the provided search criteria, search for the required vehicle.
- Move the cursor over the required record and click "Set Primary Driver"



- The Set Primary Driver popup will appear.
- Click the None button to remove a previously allocated primary driver. This will return the user to the Vehicles tab.
- Click the Cancel button to return to the Vehicles tab.



### 1.3.2.3 Allocating a Pricing Model to a Vehicle

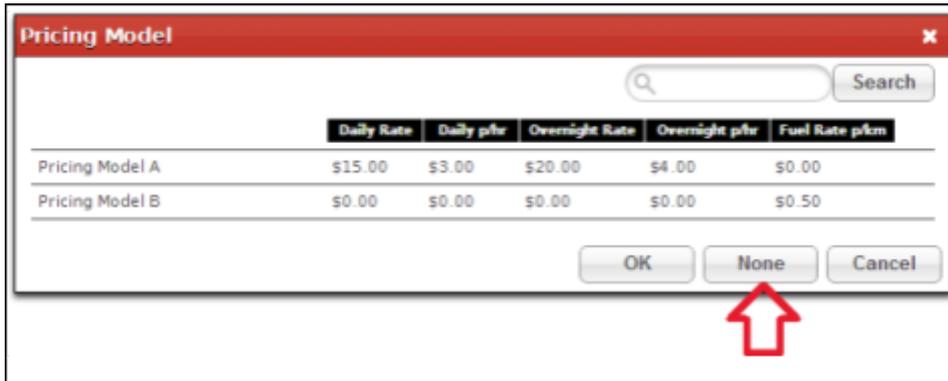
- Using the provided search criteria, search for the required vehicle.
- Move the cursor over the required record and click “Set Pricing Model”



- The Pricing Model popup will appear.
- Select a pricing model by clicking on the required pricing model record (this should highlight the record).
- Click on the OK button to allocate the selected pricing model against the vehicle.
- Click on the Cancel button to return to the Vehicles tab without saving any selections.

### 1.3.2.4 Unallocating a Pricing Model from a Vehicle

- Using the provided search criteria, search for the required vehicle.
- Move the cursor over the required record and click “Set Pricing Model”.
- Click on the None button to remove a previously allocated pricing model. This will return the user to the Vehicles tab.
- Click on the Cancel button to return to the Vehicles tab without saving any selections.



### 1.3.3 PMO Administration

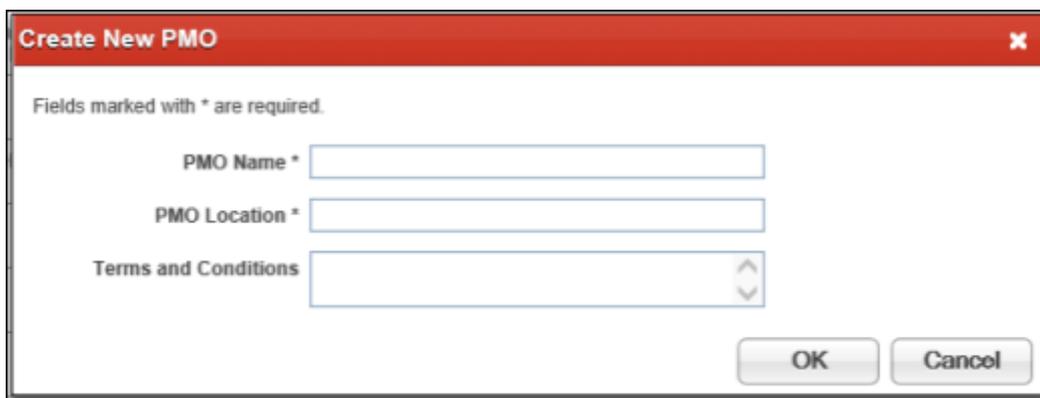
To navigate to the PMO Administration page, click the PMOs tab.



| Button  | Description   |
|---------|---|
| New PMO | This button can be used to create a new PMO.                              |
| Search  | This button will filter the list of PMOs using the provided search field. |

#### 1.3.3.1 Creating a new PMO

- Click on the New PMO button.
- The New PMO popup will appear where the user is to enter the required fields.
- Click on the OK button to save the new PMO.
- Click on the Cancel button to return to the PMOs tab without saving any changes.



### 1.3.3.2 Modifying an Existing PMO

- Using the provided search criteria, search for the required PMO.
- Select a PMO by clicking on the required PMO record (hovering the cursor over the user will highlight the record).
- A Modify PMO popup will appear (fig 25) where the user is able to make the required modifications.
- Click the OK button to save the changes made to the PMO.
- Click the Cancel button to return to the PMOs tab without saving any changes.

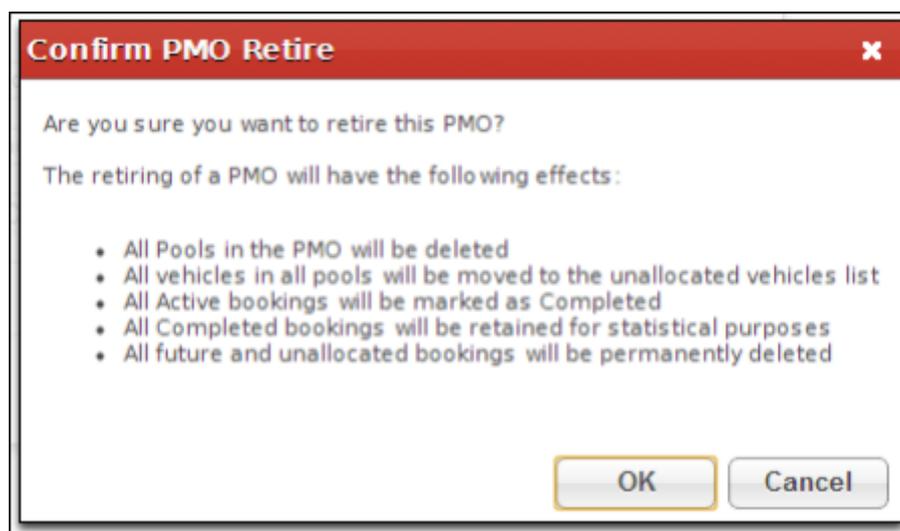
| Field                | Description   |
|----------------------|---|
| PMO Name             | The name of the Pool Management Office (PMO).   |
| PMO Location         | The location of the PMO.  |
| Terms and Conditions | The terms and conditions relating to the PMO. This will be appended to the email that is generated when a booking is allocated to a vehicle.<br><br>Typical Terms and Conditions would be something like "Collect pool vehicle keys from reception counter, Ground Level." or Please refuel the vehicle if the fuel gauge reads less than ¼". |

### 1.3.3.3 Deleting an Existing PMO

- Using the provided search criteria, search for the required PMO.
- Select a PMO by clicking on the required PMO record (hovering the cursor over the user will highlight the record).
- A Modify PMO popup will appear.
- Click the Retire PMO button.
- A warning popup will appear confirming the deletion of the selected PMO.

Please note: the deletion of a PMO will also delete all associated pools, unallocate all associated vehicles, change the status of all Active bookings to Complete and delete all future unallocated bookings.

- Click the OK button to delete the selected PMO.
- Click the Cancel button to return to the Modify PMO popup.



### 1.3.4 Pool Administration

To navigate to the Pool Administration page, click the Pools tab



#### 1.3.4.1 Creating a new Pool

- Select a PMO from the PMO dropdown list which the new pool will belong to.
- Click on the New Pool button.
- The New Pool popup will appear where the user is to enter the required fields.

Vehicles with bookings within these times will be subject to the daily rates (if a pricing model is applied). Vehicles with bookings outside of these times will be subject to overnight rates (if a pricing model has been applied.)

- Click on the Save button to create the new pool.
- Click on the Cancel button to return to the Pools tab without saving any changes.

| Field             | Description                       |
|-------------------|-----------------------------------|
| Pool Name         | The name of the new pool.         |
| Pool Location     | The location of the new pool.     |
| Availability From | The opening time of the new pool. |
| Availability To   | The closing time of the new pool. |

### 1.3.4.2 Modifying an Existing Pool

- Select the required PMO from the PMO dropdown list.
- Select a pool by clicking on the required pool record (hovering the cursor over the user will highlight the record). Be careful not to click on the “Assign Vehicles” button.
- The Modify Pool popup will appear where the user is able to make the required modifications.
- Click on the Save button to save the changes made to the selected pool.
- Click on the Cancel button to return to the Pools tab without saving any changes.

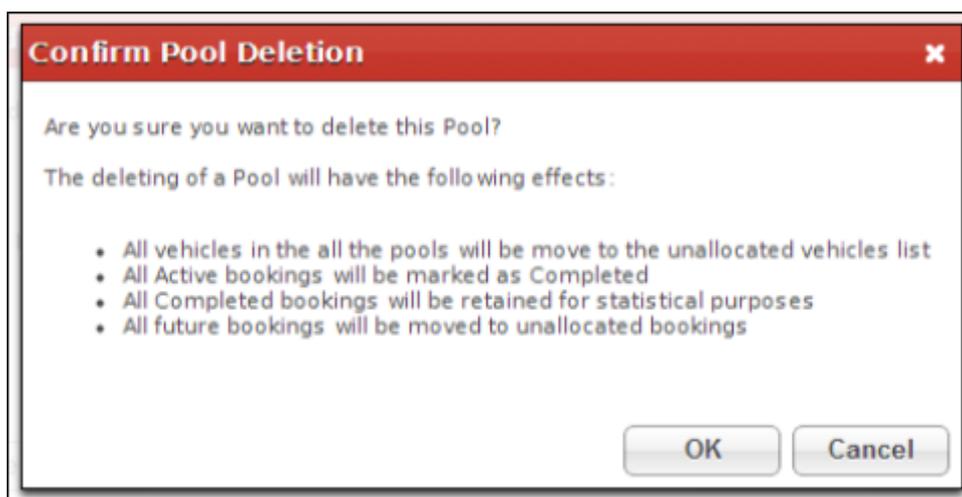
| Field             | Description                   |
|-------------------|-------------------------------|
| Pool Name         | The name of the pool.         |
| Pool Location     | The location of the pool.     |
| Availability From | The opening time of the pool. |
| Availability To   | The closing time of the pool. |

### 1.3.4.3 Deleting an Existing Pool

- Select the required PMO from the PMO dropdown list.
- Select a pool by clicking on the required pool record (hovering the cursor over the user will highlight the record). Be careful not to click on the “Assign Vehicles” button.
- The Modify Pool popup will appear.
- Click the Delete Pool button.
- A warning popup will appear confirming the deletion of the selected pool.

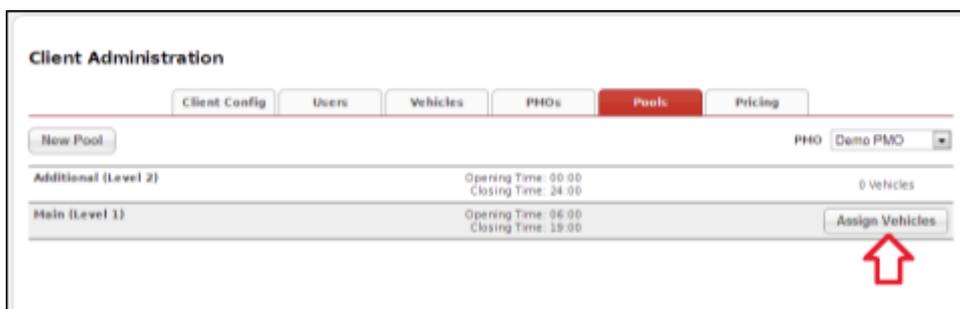
**Please note:** The deletion of a pool will unallocated all associated vehicles, change the status of all Active bookings to Complete and unallocated all future allocated bookings.

- Click the OK button to delete the selected pool.
- Click the Cancel button to return to the Modify Pool popup.

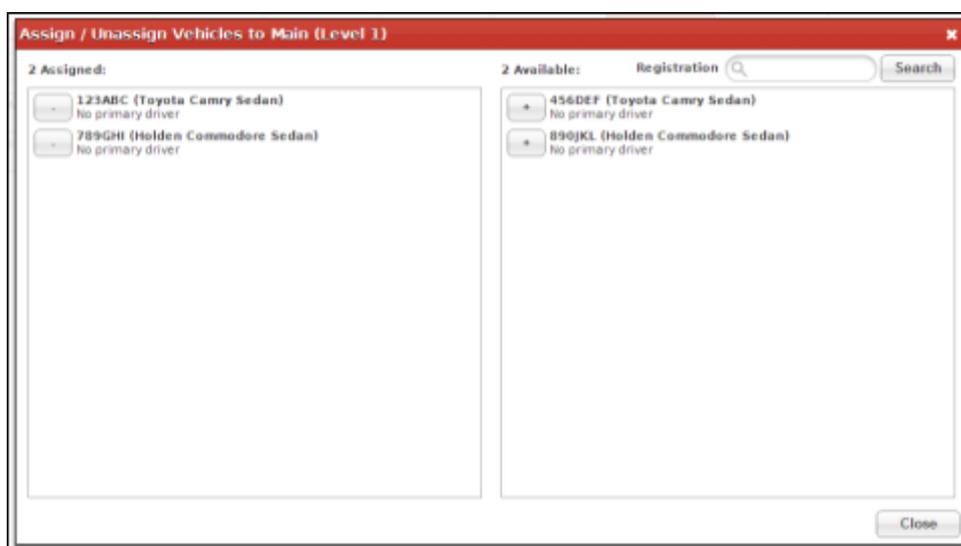


### 1.3.4.4 Adding Vehicles to a Pool

- Select the required PMO from the PMO dropdown list.
- Move the cursor over the required pool record and click “Assign Vehicles”.



- The Assign Vehicles popup will appear. The vehicles currently assigned to the selected pool will be listed in the Assigned (left) section.
- Using the registration search functionality provided, search for the vehicle to be allocated.
- From the search results, click the “+” (plus) button to add the selected vehicle to the selected pool.
- The selected vehicle will now be listed in the Assigned (left) section. The vehicle will also now display in the Calendar module when the PMO/pool is selected.
- Click the Close button to return to the Pools tab.



### 1.3.4.5 Removing Vehicles from a Pool

- Select the required PMO from the PMO dropdown list.
- Move the cursor over the required pool record and click “Assign Vehicles”.
- The Assign Vehicles popup will appear. The vehicles currently assigned to the selected pool will be listed in the Assigned (left) section.
- Using the registration search functionality provided, search for the vehicle to be unallocated.

- From the search results, click the “-” (minus) button to remove the selected vehicle to the selected pool.
- The selected vehicle will now be listed in the Available (right) section. The vehicle will also no longer display in the Calendar module when the PMO/pool is selected.
- Click the Close button to return to the Pools tab.

### 1.3.5 Pricing Model Administration

To navigate to the Pricing Model Administration page, click the Pricing tab.



| Field           | Description   |
|-----------------|---|
| Daily Rate      | The daily rate applied for the pricing model. This rate is used when a booking's start time and end time extends past the opening time and closing time of the pool.          |
| Daily Rate p/hr | The daily rate per hour applied for the pricing model. This rate is used when a booking's start time and end time falls within the opening time and closing time of the pool. |

|                        |  |
|------------------------|--|
| <b>Daily Rate p/hr</b> | <b>The daily rate per hour applied for the pricing model. This rate is used when a booking's start time and end time falls within the opening time and closing time of the pool.</b>                           |
| Overnight Rate         | The overnight rate applied for the pricing model. This rate is used when a booking's end time extends past the closing time for the current day and the opening time of the next day.                          |
| Overnight Rate p/hr    | The overnight rate per hour applied for the pricing model. This rate is used when a booking's end time extends past the closing time for the current day and finishes before the opening time of the next day. |
| Fuel Rate p/km         | The fuel rate per kilometre applied for the pricing model.   |

### 1.3.5.1 Modifying an Existing Pricing Model

- Select a pricing model by clicking on the required pricing model record.
- The Modify Pricing Model popup will appear where the user is able to make the required modifications.
- Click on the Save button save the changes made to the selected pricing model.
- Click on the Cancel button to return to the Pricing tab without saving any changes.

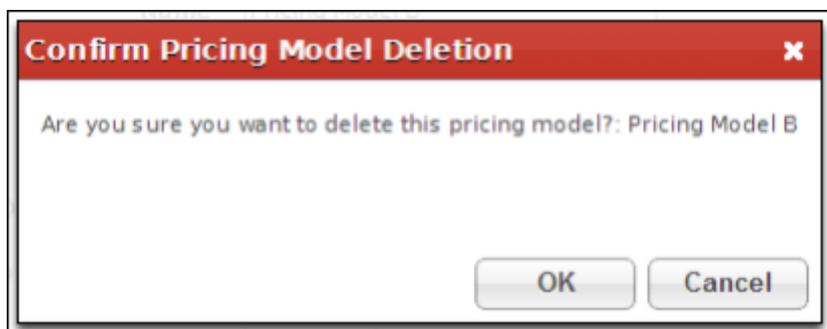
| Field           | Description  |
|-----------------|--|
| Name            | The name of the new pricing model.                             |
| Description     | The description of the new pricing model.                      |
| Daily Rate      | The daily rate applied for the new pricing model.              |
| Daily Rate p/hr | The daily rate per hour applied for the new pricing model.     |
| Overnight Rate  | The overnight rate applied for the new pricing model.          |
| Fuel Rate p/km  | The fuel rate per kilometre applied for the new pricing model. |

### 1.3.5.2 Deleting a Pricing Model

- Select a pricing model by clicking on the required pricing model record.
- The Modify Pricing Model popup will appear.
- Click on the Delete Pricing Model button.
- A warning popup will appear confirming the deletion of the selected pricing model.

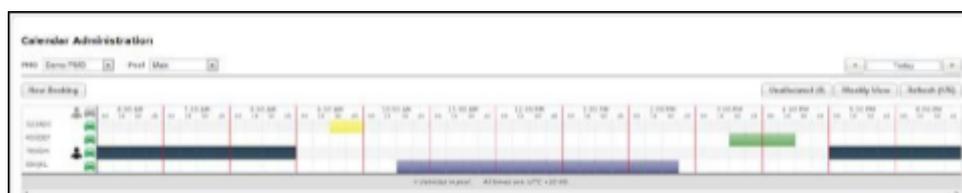
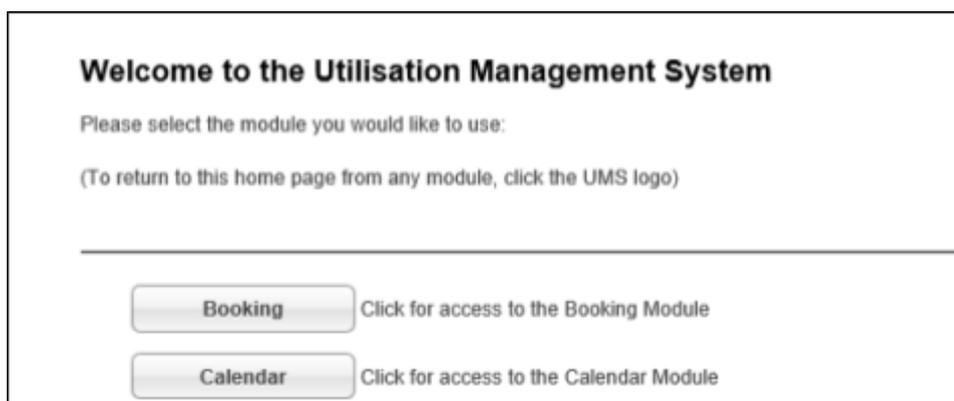
**Please note:** If the pricing model is allocated to a client or a vehicle then the deletion of the pricing model will not be possible. These associations will have to be removed before the pricing model can be successfully deleted.

- Click on the OK button to delete the selected pricing model.
- Click on the Cancel button to return to the Modify Pricing Model popup without deleting the selected pricing model.



## 1.4 Calendar Module

To navigate to the Calendar module, click the Calendar button from the home page. The calendar will then be displayed



## Fields

| Field               | Description   |
|---------------------|---|
| Registration        | The registration of the vehicle.  |
| Primary Driver Icon | Indication as to whether the vehicle has a primary driver or not. A driver icon (  ) is displayed if the vehicle has an allocated primary driver.      |
| Vehicle Status Icon | The status of the vehicle represented by different colours. The colour references are used to provide an overview of each vehicle in the selected PMO/pool and can be used to determine if any vehicles require attention. (see page 2) |
| Time Window         | The time window broken up into fifteen (15) minute intervals.   |

## Buttons

| Button        | Description  |
|---------------|--|
| PMO Dropdown  | The PMO dropdown can be used to select the required PMO.   |
| Pool Dropdown | The Pool dropdown can be used to select the required pool (based on the PMO selected).   |
| Day Selector  | The Day selector can be used to navigate to day. The left and right buttons can be used to navigate the previous or next days, respectively. |
| New Booking   | The New Booking button can be used to create a booking from within the calendar.   |
| Unallocated   | The Unallocated button can be used to display the Unallocated window and all unallocated bookings for the selected PMO/pool.                 |
| Weekly View   | The Weekly View button can be used to display the current week view.   |
| Refresh       | The refresh button can be used to refresh the current view. This occurs automatically every 180 seconds (3 minutes).                         |

## Vehicle Status Icons

| Icon  | Description  |
|---|--|
|  | The green vehicle indicates that the vehicle is currently in its required state. For example, if the vehicle is meant to be checked out at the current time and it currently is, the green vehicle will display. |
|  | The purple vehicle indicates that the vehicle is currently overdue for check out. If an allocated booking has not been checked out at the correct time the purple vehicle will display.                          |
|  | The red vehicle indicates that the vehicle is currently overdue for check in. If a checked out booking is overdue and has not been checked in on time the red vehicle will display.                              |

|   |  |
|---|--|
|  | The grey vehicle indicates that the vehicle is unavailable for bookings at the current time. |
|---|--|

## Booking Colour Scheme

| Booking Colour  | Description   |
|---|---|
|    | <p>The green booking indicates an allocated booking that is yet to be checked out. A booking with this colour will have the following options:</p> <ul style="list-style-type: none"> <li>• <u>Check Out</u>: To check out the allocated booking.</li> <li>• <u>Cancel</u>: To cancel the allocated booking.</li> <li>• <u>Amend</u>: To amend the allocated booking.</li> <li>• <u>Change Vehicle</u>: To change the vehicle the booking is currently allocated to.</li> <li>• <u>Complete</u>: To complete the booking.</li> <li>• <u>Unallocate</u>: To unallocate the booking.</li> <li>• <u>Cancel</u>: To cancel the booking</li> </ul> |
|   | <p>The purple booking indicates a booking that has been checked out but not yet checked in. A booking with this colour will have the following options:</p> <ul style="list-style-type: none"> <li>• <u>Check In</u>: To check in the checked out booking.</li> <li>• <u>Amend</u>: To amend the checked out booking.</li> <li>• <u>Cancel</u>: To cancel the booking</li> </ul>  |
|  | <p>The yellow booking indicates a booking that been completed and has gone through both check out and check in stages. A booking with this colour will have only one option:</p> <ul style="list-style-type: none"> <li>• <u>Amend</u>: To amend the completed booking.</li> <li>• <u>Cancel</u>: To cancel the booking</li> </ul>  |
|  | <p>The dark blue booking indicates the primary driver period where the vehicle is not available for bookings. No options are available to bookings with this colour.</p>  |

### 1.4.1 Create a New Booking

- Select the required PMO from the PMO dropdown.
- Select the required pool from the Pool dropdown.
- Click on the New Booking button
- The New Booking popup will appear where the user is to enter the required fields.
- Click on the OK button to check out the booking.
- Click on the Cancel button to return to the Calendar window without saving any changes.

**New Booking** [X]

Fields marked with \* are required.

Date Out \* 09-03-2021, 12:15

Date In \* 09-03-2021, 13:15

Destination \*

Purpose \*

Requirements

Number of Passengers (inc. driver) \*

Cost Centre \*

Alt. Contact

Job Number

Booked For \* Enter text to start search **New**

Booking Contact No

Vehicle \* Select a vehicle... ▾

Private Use

Valid Licence \*

Overnight

Retrospective

No Invoicing

OK Cancel

| Field                             | Description   |
|-----------------------------------|---|
| Date Out                          | The start date and time of the new booking.   |
| Date In                           | The end date and time of the new booking.   |
| Destination                       | The destination of the new booking.   |
| Purpose                           | The purpose of the new booking.   |
| Requirements                      | Provided for the recording of any special requirements.   |
| Number of Passengers (inc Driver) | The number of passengers transported for the new booking including the driver.                            |
| Cost Centre                       | The cost centre related to the new booking. This will be automatically populated when selecting a driver. |
| Alt. Contact                      | The driver contact details for the new booking.   |
| Job Number                        | Provided for the recording of a work order number if there was a work order related to the booking.       |
| Private Use                       | Indication whether it is a business or personal booking   |
| Valid Licence                     | Indication whether the driver has a valid driver's licence.   |
| Overnight                         | Indication whether the booking is overnight (more than 1 day, crosses midnight).                          |
| Retrospective                     | Allows for the creation of a booking in the past.   |
| No Invoicing                      | Indication whether pricing needs to be generated for this booking.  |
| Booked For                        | The driver details for the new booking. Search and create functionality provided here.                    |
| Vehicle                           | The vehicle allocated to the new booking. The vehicle can be selected from the Vehicle dropdown.          |

#### 1.4.1.1 Checking Out a Bookings

- Only bookings in an allocated state (green) can be checked out.
- Left click on the required allocated booking and select the Check Out option.
- The Check Out Vehicle popup will appear where the user is to enter the required fields.
- Click on the OK button to check out the booking.

**Please note** that this will change the booking colour from green to purple.

- Click on the Cancel button to return to the Calendar window without saving any changes.

| Field          | Description  |
|----------------|--|
| Odo Out        | The current odometer reading of the vehicle.   |
| Fuel Out       | The current fuel reading of the vehicle. Options for empty, one quarter, a half, three quarters and a full tank exist. |
| Overnight Form | Indication whether the booking is overnight (more than 1 day, crosses midnight)  |
| Notes          | Any details that are required to be noted at check out stage.  |

#### 1.4.1.2 Checking in a Booking

- Only bookings in a checked out state (purple) can be checked in.
- Left click on the required allocated booking and select the Check In option.
- The Check in Vehicle popup will appear where the user is to enter the required fields.
- Click on the OK button to check out the booking.

**Please note** that this will change the booking colour from purple to yellow.

- Click on the Cancel button to return to the Calendar window without saving any changes.

| Field    | Description  |
|----------|--|
| Odo Out  | The odometer reading of the vehicle at time of check out.  |
| Odo In   | The current odometer reading of the vehicle.   |
| Fuel In  | The current fuel reading of the vehicle. Options for empty, one quarter, a half, three quarters and a full tank exist.                             |
| Accident | Indication as to whether the vehicle was involved in an accident during the booking. (There is a notes section for further detail to be captured). |
| Damage   | The damage level of the vehicle. Options for none, low, minor and major exist.   |
| Notes    | Any details that are required to be noted at check out stage.  |

### 1.4.1.3 Amending a Booking

- Bookings in any state can be amended.
- Left click on the required booking and select the Amend option.
- The Amend Booking popup will appear where the user enters the required fields.
- Click on the Save Changes button to amend the booking.
- Click on the Cancel button to return to the Calendar window without saving any changes.

**Amend Booking #1**

Date Out: 02-08-2013, 09:30  
 Origin: Main  
 Odo Out: 50  
 Fuel Out: Full

Date In: 02-08-2013, 10:00  
 Destination: Client  
 Odo In: 100  
 Fuel In: 3/4  
 Accident:  Damage: None

Purpose: Meeting  
 Requirements:

Number of Passengers (inc driver): 1  Private Use  
 Cost Centre: CC123  Valid Licence  
 Mobile: 12345678  Overnight  
 All Contact:  Priority: High  
 Work Order:   
 Booked By: Client Administrator  
 Booked For: John Smith

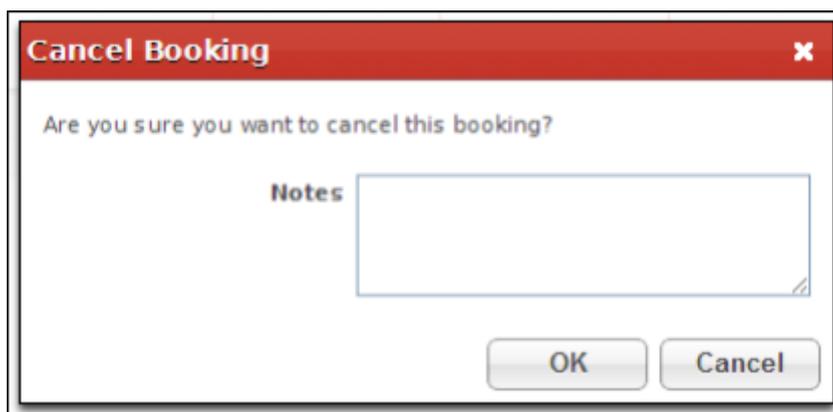
| Field                             | Description  |
|-----------------------------------|--|
| Date Out                          | The start date and time of the booking.  |
| Date In                           | The end date and time of the booking.  |
| Origin                            | The origin of the booking.   |
| Destination                       | The destination of the booking.  |
| Odo Out                           | The odometer reading of the vehicle at time of check out.  |
| Odo In                            | The odometer reading of the vehicle at time of check in.   |
| Fuel Out                          | The fuel reading of the vehicle at check out stage. Options for empty, one quarter, a half, three quarters and a full tank exist.                  |
| Fuel In                           | The fuel reading of the vehicle at check in stage. Options for empty, one quarter, a half, three quarters and a full tank exist.                   |
| Accident                          | Indication as to whether the vehicle was involved in an accident during the booking. (There is a notes section for further detail to be captured). |
| Damage                            | The damage level of the vehicle. Options for none, low, minor and major exist.   |
| Purpose                           | The purpose of the booking.  |
| Requirements                      | Provided for the recording of any special requirements.  |
| Number of Passengers (inc Driver) | The number of passengers transported for the booking including the driver.   |
| Cost Centre                       | The cost centre related to the booking. This will be automatically populated when selecting a driver.  |
| Alt. Contact                      | The driver contact details for the booking.  |
| Job Number                        | Provided for the recording of a work order number if there was a work order related to the booking.  |
| Private Use                       | Indication whether it is a business or personal booking  |
| Valid Licence                     | Indication whether the driver has a valid driver's licence.  |
| Overnight                         | Indication whether the booking is overnight (more than 1 day, crosses midnight).   |
| Booked For                        | The driver details for the new booking. Search and create functionality provided here.   |
| Notes                             | Any details that need to be recorded at amendment stage.   |

### 1.4.1.4 Cancelling a Booking

- Left click on the required booking and select the Cancel option.
- The Cancel Booking popup will appear where the user is to enter the required fields.
- Click on the OK button to cancel the booking.

**Please note:** this will remove the booking from the Calendar window.

- Click on the Cancel button to return to the Calendar window without saving any changes.



| Field | Description   |
|-------|---|
| Notes | Any details that need to be recorded at cancellation stage. |

### 1.4.1.5 Completing a Booking

- Only bookings in an allocated (green) state can be completed.
- Left click on the required allocated booking and select the Complete option.

**Please note:** this will change the booking colour from green to yellow.

#### 1.4.1.6 Changing the Vehicle of an Allocated Booking

- Only bookings in an allocated (green) state can undergo a vehicle change.
- Left click on the required allocated booking and select the Change Vehicle option.
- The Change Vehicle popup will appear where the user is to select the required vehicle. Only vehicles from the selected pool will be available for selection.
- Click on the OK button to reallocate the booking to the selected vehicle.

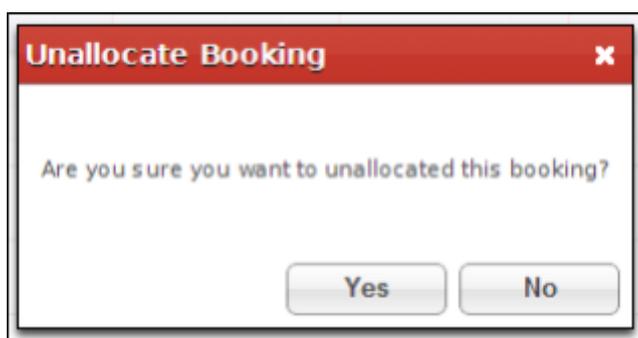
**Please note:** this will move the booking to the new vehicle.

- Click on the Cancel button to return to the Calendar window without saving any changes.



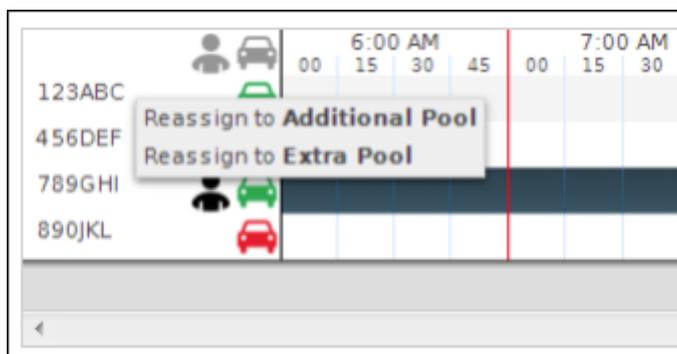
#### 1.4.1.7 Unallocating a Vehicle from a Booking

- Only bookings in an allocated (green) state can be unallocated.
- Left click on the required allocated booking and select the Unallocate option.
- The Unallocate Booking popup will appear.
- Click on the Yes button to unallocate the vehicle of the booking. Please note: this will remove the booking from the Calendar window and place it back in the unallocated queue.
- Click on the No button to return to the Calendar window without saving any changes.



### 1.4.1.8 Moving a Vehicle to a Different Pool

- Left click on the registration number of the required vehicle.
- A list of available pools will be displayed



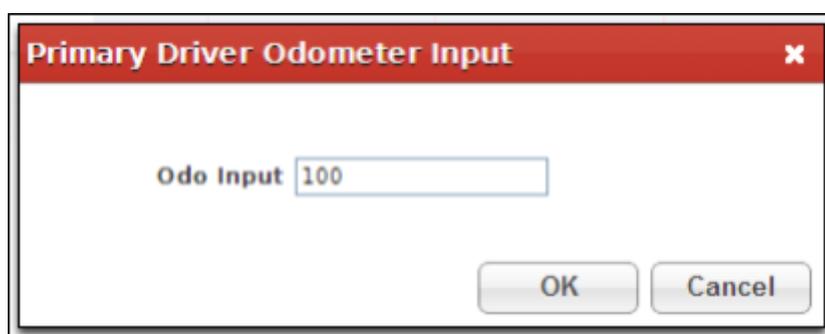
- Click on the required pool.
- The Move Vehicle popup will appear.



- Click on the Yes button to move the selected vehicle to the selected pool.  
Please note: this will move the vehicle to the selected pool.
- Click on the No button to return to the Calendar window without saving any changes.

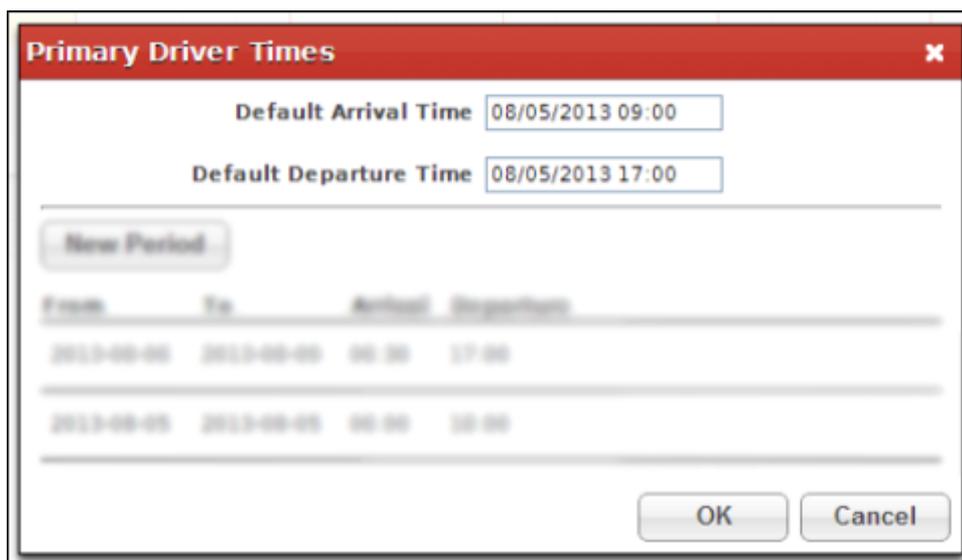
#### 1.4.1.9 Updating Vehicle Odometer After Primary Driver Usage

- Only vehicles which have a primary driver assigned to it can have the odometer updated.
- Left click on the Primary Driver icon (next to the required vehicle registration).
- Select Primary Driver Odometer Input.
- The Primary Driver Odometer Input popup will appear where the user can enter the current odometer reading.
- Click on the OK button to update the vehicle's odometer.
- Click on the Cancel button to return to the Calendar window without saving any changes.



#### 1.4.1.10 Updating Default Primary Driver Times for a Vehicle

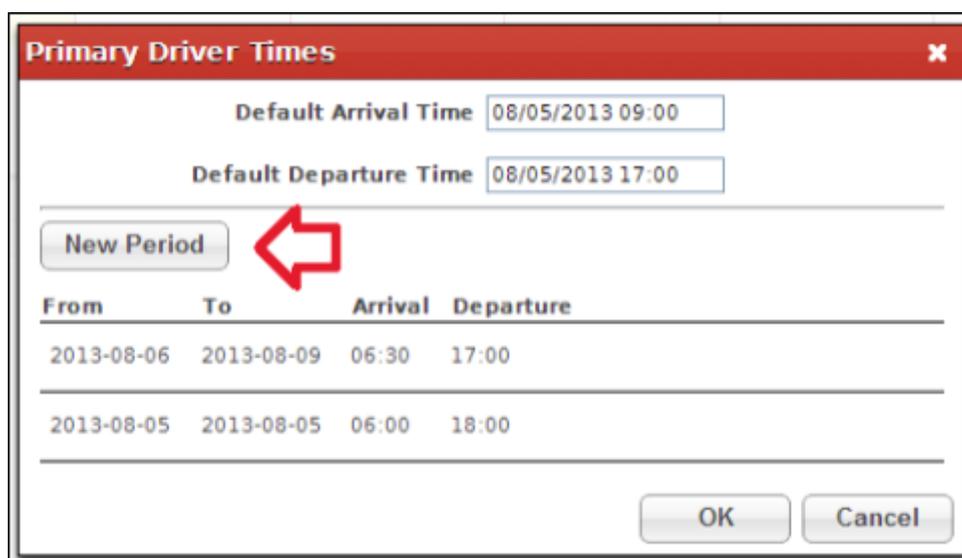
- Only vehicles which have a primary driver assigned to it can have the default primary driver times updated.
- Left click on the Primary Driver icon (next to the required vehicle registration).
- Select Primary Driver Times.
- The Primary Driver Times popup will appear where the user can make the required changes to the default primary driver arrival time and the default primary driver departure time.
- Click on the OK button to update the vehicle's default primary driver times.
- Click on the Cancel button to return to the Calendar window without saving any changes.



#### 1.4.1.11 Creating a Primary Driver Period

- Only vehicles which have a primary driver assigned to it can have new primary driver periods applied.
- A Primary Driver Period is a temporary period of time in which different departure and arrival times apply instead of the default times.
- Left click on the Primary Driver icon (next to the required vehicle registration).
- Select Primary Driver Times.
- The Primary Driver Times popup will appear.

Click on the New Period button.



- The New Primary Driver Period popup appears where the user is to enter all the required fields.
- Click on the OK button to save the new primary driver period.
- Click on the Cancel button to return to the Primary Driver Times popup.
- Afterwards, click on either the OK or Cancel buttons to close the Primary Driver Times popup.

| Field   | Description  |
|---------|--|
| Arrives | The arrival time for the new primary driver period.                  |
| Departs | The departure time for the new primary driver period.                |
| From    | The start date from which this new primary driver period will apply. |
| To      | The end date to which this new primary driver period will apply.     |

#### 1.4.1.12 Modifying an Existing Primary Driver Period

- Only vehicles which have a primary driver assigned to it can have primary driver periods modified.
- A Primary Driver Period is a temporary period of time in which different departure and arrival times apply instead of the default times.
- Left click on the Primary Driver icon (next to the required vehicle registration).
- Select Primary Driver Times.
- The Primary Driver Times popup will appear.
- Move the cursor over the required primary driver period and click on the Modify button.

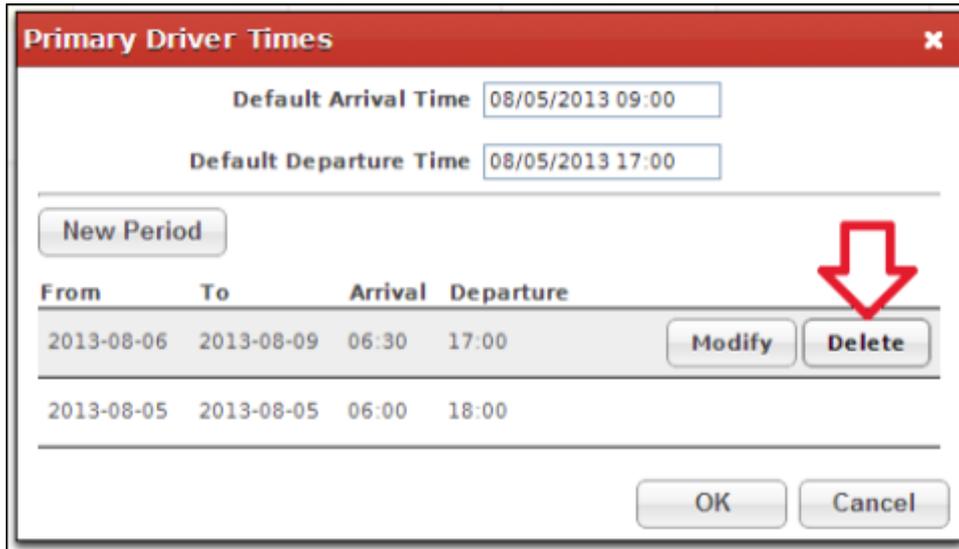
| From       | To         | Arrival | Departure |               |
|------------|------------|---------|-----------|---------------|
| 2013-08-06 | 2013-08-09 | 06:30   | 17:00     | Modify Delete |
| 2013-08-05 | 2013-08-05 | 06:00   | 18:00     |               |

- The Modify Primary Driver Period popup appears where the user is to enter all the required fields.
- Click on the OK button to save the primary driver period.
- Click on the Cancel button to return to the Primary Driver Times popup.
- Afterwards, click on either the OK or Cancel buttons to close the Primary Driver Times popup.

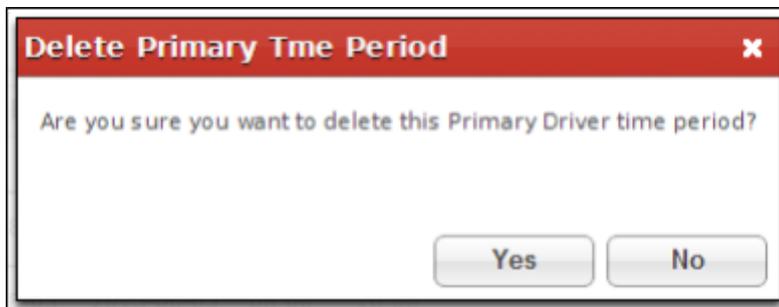
| Field   | Description  |
|---------|--|
| Arrives | The arrival time for the primary driver period.                  |
| Departs | The departure time for the primary driver period.                |
| From    | The start date from which this primary driver period will apply. |
| To      | The end date to which this primary driver period will apply.     |

#### 1.4.1.13 Deleting an Existing Primary Driver Period

- Only vehicles which have a primary driver assigned to it can have primary driver periods deleted.
- A Primary Driver Period is a temporary period of time in which different departure and arrival times apply instead of the default times.
- Left click on the Primary Driver icon (next to the required vehicle registration).
- 
- Select Primary Driver Times.
- The Primary Driver Times popup will appear.
- Move the cursor over the required primary driver period and click on the Delete button.

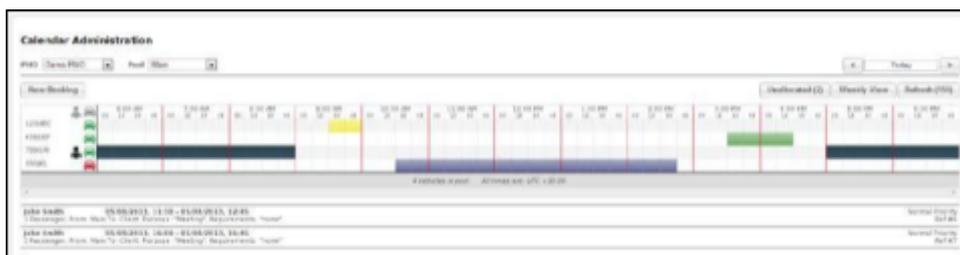


- The Delete Primary Driver Period popup.
- Click on the Yes button to delete the primary driver period.
- Click on the No button to return to the Primary Driver Times popup.
- Afterwards, click on either the OK or Cancel buttons to close the Primary Driver Times popup.



## 1.4.2 Unallocated Window

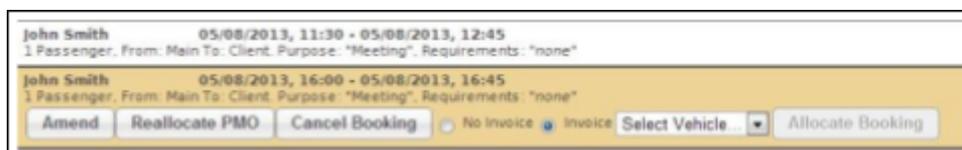
The Unallocated Window can be accessed by selecting a PMO and a Pool, then clicking on the Unallocated button in the top right corner of the Calendar. This button will only be clickable if there are unallocated bookings for the selected PMO.



| Button               | Description   |
|----------------------|---|
| Amend                | The Amend button can be used to amend an unallocated booking.                                   |
| Reallocate PMO       | The Reallocate PMO button can be used to reallocate a booking to a different PMO.               |
| Cancel Booking       | The Cancel Booking button can be used to cancel an unallocated booking.                         |
| No Invoice / Invoice | The No Invoice/Invoice option is used to determine if the booking is to attract a price charge. |
| Vehicle dropdown     | The Vehicle dropdown is used to select a vehicle that a booking is to be allocated to.          |

### 1.4.2.1 Allocating a Booking Created from the Booking Module or that has been Unallocated

- Select the required PMO from the PMO dropdown.
- Select the required pool from the Pool dropdown.
- Click on the Unallocated button (the Unallocated window should appear below the Calendar).
- Select a booking to allocate a vehicle to by clicking on the required booking (this will highlight the record).



- Based on the date and times of the selected booking and the number of passengers, select a suitable vehicle that is free for the duration of the booking by using the Vehicle dropdown
- Select the Invoice or No Invoice option depending on whether the booking is to attract a price charge or not.
- Click on the Allocate Booking button. The booking will now display in the Calendar window as an Allocated (green) booking.

### 1.4.2.2 Amending Unallocated Bookings

- Select the required PMO from the PMO dropdown.
- Select the required pool from the Pool dropdown.
- Click on the Unallocated button (the Unallocated window should appear below the Calendar).
- Select a booking to amend a vehicle to by clicking on the required booking (this will highlight the record).



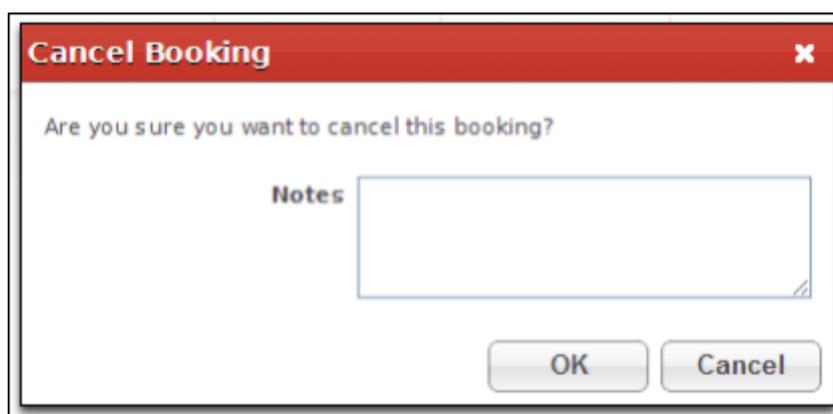
| Field                             | Description  |
|-----------------------------------|--|
| Date Out                          | The start date and time of the booking.  |
| Date In                           | The end date and time of the booking.  |
| Origin                            | The origin of the booking.   |
| Destination                       | The destination of the booking.  |
| Odo Out                           | The odometer reading of the vehicle at time of check out.  |
| Odo In                            | The odometer reading of the vehicle at time of check in.   |
| Fuel Out                          | The fuel reading of the vehicle at check out stage. Options for empty, one quarter, a half, three quarters and a full tank exist.                  |
| Fuel In                           | The fuel reading of the vehicle at check in stage. Options for empty, one quarter, a half, three quarters and a full tank exist.                   |
| Accident                          | Indication as to whether the vehicle was involved in an accident during the booking. (There is a notes section for further detail to be captured). |
| Damage                            | The damage level of the vehicle. Options for none, low, minor and major exist.   |
| Purpose                           | The purpose of the booking.  |
| Requirements                      | Provided for the recording of any special requirements.  |
| Number of Passengers (inc Driver) | The number of passengers transported for the booking including the driver.   |
| Cost Centre                       | The cost centre related to the booking. This will be automatically populated when selecting a driver.  |
| Alt. Contact                      | The driver contact details for the booking.  |
| Job Number                        | Provided for the recording of a work order number if there was a work order related to the booking.  |
| Private Use                       | Indication whether it is a business or personal booking  |
| Valid Licence                     | Indication whether the driver has a valid driver's licence.  |
| Overnight                         | Indication whether the booking is overnight (more than 1 day, crosses midnight).   |
| Booked For                        | The driver details for the new booking. Search and create functionality provided here.   |
| Notes                             | Any details that need to be recorded at amendment stage.   |

### 1.4.2.3 Cancelling Unallocated Bookings

- Select the required PMO from the PMO dropdown.
- Select the required pool from the Pool dropdown.
- Click on the Unallocated button (the Unallocated window should appear below the Calendar).
- Select a booking to cancel a vehicle to by clicking on the required booking (this will highlight the record).
- Click on the Cancel Booking button.
- The Cancel Booking popup will appear where the user is to enter the required fields.
- Click on the OK button to amend the booking.

Please note: This will remove the booking from the Unallocated window.

- Click on the Cancel button to return to the Calendar window without saving any changes.



| Field | Description   |
|-------|---|
| Notes | Any details that need to be recorded at cancellation stage. |

### 1.4.2.4 Reallocating Bookings to a Different PMO

- Select the required PMO from the PMO dropdown.
- Select the required pool from the Pool dropdown.
- Click on the Unallocated button (the Unallocated window should appear below the Calendar).
- Select a booking to cancel a vehicle to by clicking on the required booking (this will highlight the record).
- Click on the Reallocate PMO Booking button.
- The Reallocate PMO popup will appear where the user is to enter the required fields.

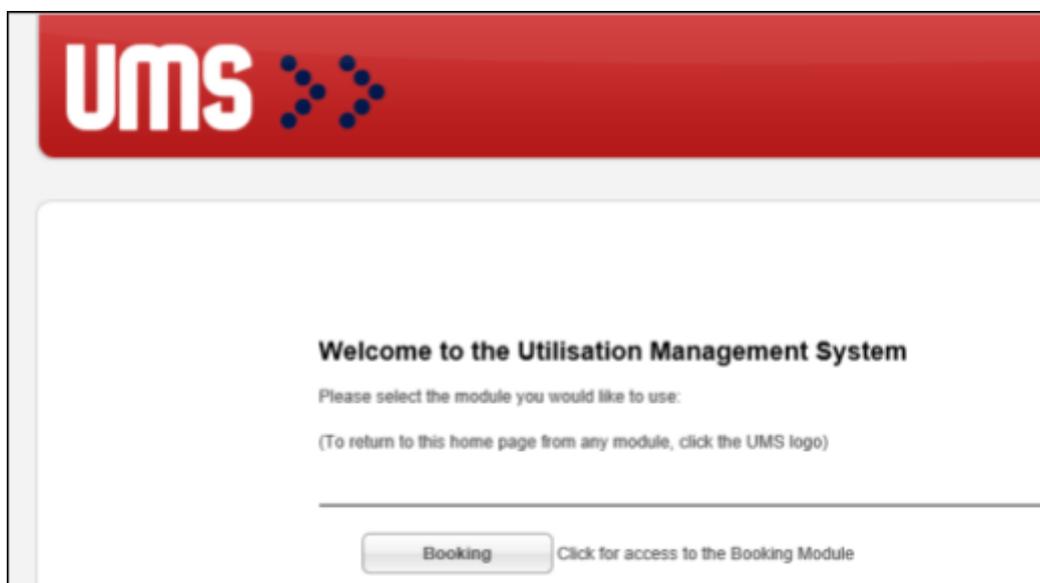
- Click on the OK button to amend the booking.

Please note: This will move the booking to the new PMO.

- Click on the Cancel button to return to the Calendar window without saving any changes.



The screenshot shows a dialog box titled "Reallocate PMO" with a red header bar and a close button (X) in the top right corner. The main area contains the text "Assign to PMO" followed by a dropdown menu labeled "Select a PMO...". At the bottom right, there are two buttons: "OK" and "Cancel".



## 1.5 Booking Module

To navigate to the Booking module, click the Booking button from the home page. The current user's bookings will then be displayed.

| Reference | Going Out               | Coming Back             | From | To   | # Passengers | Date Booked | Booking Status | Registration |
|-----------|-------------------------|-------------------------|------|------|--------------|-------------|----------------|--------------|
| 7120035   | 18 Dec 2020<br>09:00 AM | 18 Dec 2020<br>03:30 PM | city | city | 1            | 17 Dec      | SUBMITTED      |              |
| 7120036   | 21 Dec 2020<br>09:00 AM | 21 Dec 2020<br>03:30 PM | city | city | 1            | 17 Dec      | SUBMITTED      |              |

| Field          | Description  |
|----------------|--|
| Reference      | The reference number of the booking.   |
| Going Out      | The start date and time of the booking.  |
| Coming Back    | The end date and time of the booking.  |
| From           | The origin of the booking.   |
| To             | The number of passengers being transported (inc. the driver).  |
| # Passengers   | The number of passengers being transported (inc. the driver).  |
| Date Booked    | The date the booking was created.  |
| Booking Status | The current status of the booking. The following statuses are available:- <ul style="list-style-type: none"> <li>Submitted: The booking has been created but is not yet allocated to a vehicle.</li> <li>Booked: The booking has been allocated to a vehicle.</li> <li>Active: The booking has been allocated to a vehicle and the booking is currently active.</li> </ul> |
| Registration   | The registration number of the vehicle that the booking has been allocated to. This would only be for bookings in an active or booked status.  |

| Button       | Description   |
|--------------|---|
| Refresh List | The Refresh List button can be used to refresh the user's booking list. |
| New          | The New button can be used to create a new vehicle booking request.     |

## 1.5.1 Creating a Booking for Yourself

- Click on the New button provided.
- A Create Booking screen will appear where the user is able to enter the required fields

**UMS** Log out

### Create Booking

Fields marked with (\*) are required.

**Trip Details**

Pickup Location:  (\*)

Origin:  (\*)

Destination:  (\*) *Various Destinations is not acceptable. Record the furthest destination intended for the journey. Eg. Charleville.*

Recurring?:

Going Out:  (\*)

Coming Back:  (\*)

Number of Passengers (incl. Driver):  (\*)

Private Use?:  *Please note distinction between Personal and Business use. See [HERE](#)*

Special Requirements:

Job Number:

Purpose:  (\*) *Purpose MUST describe the nature of the vehicle booking and CANNOT be a single word entry; it must contain three words or more. Purpose must explain succinctly why you are going there. For example 'inspection of road closure application'. Otherwise it will not be recognised as business use and will be deemed private use for FBT (Fringe Benefit Tax) records. Multiple business journeys on one day may be recorded as a single entry. Eg: Four customer calls - Beenleigh/Gold Coast Area.*

| Field                               | Description   |
|-------------------------------------|---|
| Trip Details                        |   |
| Pickup Location                     | The pickup location of the vehicle for the booking.   |
| Origin                              | The departure location of the booking   |
| Destination                         | The destination of the booking  |
| Recurring?                          | Is this booking a recurring booking for the same day/time in the future? If so, a similar booking will be created for the specified window. |
| Going Out                           | The booking start date and time. A calendar popup has been provided to assist with the selection of the date and time.                      |
| Coming Back                         | The booking end date and time. A calendar popup has been provided to assist with the selection of the date and time.                        |
| Number Of Passengers (incl. driver) | The number of passengers to be transported for the booking.   |
| Private Use                         | Indication whether the booking includes personal use.   |
| Special Requirements                | Provides for the recording of any special requirements for the booking.   |
| Job Number                          | Provides for the recording of a work order if there is a work order relating to the booking.  |
| Purpose                             | Purpose of the booking.   |
| Organisation                        | The Department you are assigned to.   |
| Driver                              | The person who drives the vehicle.  |
| Office Phone                        | Driver Office Phone number  |
| Contact Phone for this booking      | Secondary contact of the driver.  |
| Cost Centre for this booking        | The cost centre is related to the booking. This will be automatically populated when selecting a driver.                                    |
| Valid Licence?                      | This is to confirm that user Driver had a valid Licence.  |
| Priority Booking?                   | To prioritise the user requirements.  |

- Click on the Create Booking button to create a new booking.
- Click on the Return to Worklist button to return to the user's bookings.

