



# Utilisation Management System (UMS) user guide

## 1 Getting started with UMS

### Version 1.0

This manual is useful for all users of the UMS and provides guidelines on setting up and operating the system.

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## 1 Read Me First

Thank you for using QFleet's Utilisation Management System (UMS). QFleet uses the data collected by UMS to provide fleet performance reporting to agencies, as outlined in the QFleet Fleet Efficiency and Utilisation Policy for the Queensland Government motor vehicle fleet (the FE&U Policy). Although data must be administered by personnel from your department, QFleet provides user guides and on-going systems support for UMS.

UMS is a no cost client application and simplifies the daily management of your fleet. For further assistance on how to implement the system in your own organisation contact your QFleet Senior Account Manager (SAM).

## 2 About this document

This document should be used by all users in all roles who need to access or work with guidelines both setting up and operating UMS on a daily basis including:

- Client Administrators
- Pooling Management Office (PMO) Managers and PMO Officers
- Drivers

Refer to UMS Roles and User Matrix Appendix in this document for a full checklist of which task requires which application, and level of access.

- Getting Started User Guide – about UMS and vehicle utilisation, login, support, role matrix. Useful for all UMS users.
- Quick reference guide for drivers – This manual is a short how-to guide for drivers.
- FAQs and Troubleshooting Guide – Frequently asked questions regarding UMS, extra hints and tips for all users.
- Client Administrator Application User Guide – how to setup and implement UMS and maintain the system. Useful for Client Administrators.
- Calendar Application User Guide – how to allocate vehicles and manage booking requests. Useful for PMO Managers, and PMO Officer (with limited access).
- Booking Application User Guide – how to book vehicles. Useful for drivers.
- Implementation Pack – Installation and setup information, templates, training exercises. Useful for Client Administrators.

All user guides have been written for the basic user, with an overview for each section. The overview aims to provide background knowledge for each section.



Handy tips and hints will also be provided throughout the user guide and will be highlighted by our guru pictured to the left. These may include best practices, examples or other important information.

## 3 Overview of the UMS

The aim of the UMS is to assist clients to better manage the daily use, allocation and associated cost impacts of their leased fleet. UMS consists of four applications:

- Calendar application - easily manage the daily use of vehicles.
- Client Administrator application – configure and update UMS.
- Booking application - easy access for booking of vehicles.
- UMS Monitor – monitor fleet utilisation (the distance travelled by vehicles in your fleet and the time that they are in use). The UMS monitor allows Fleet Managers and Client Administrators to export information collected by UMS in Excel format for further analysis.
- Although data must be administered by personnel from your department, QFleet provides user guides and on-going systems support.

## 4 UMS terminology

UMS uses terminology specific to the system, and is related to the vehicle leasing and fleet management industry. Below is a list of the key terms used in UMS:

Booking application	Used by drivers to create requests for vehicles. Also used to create requests for vehicles for recurring journeys.
Calendar application	Displays all bookings and their status. Enables PMO Managers to allocate vehicles to bookings, amend bookings and create new bookings. <i>Note: A user with only PMO Officer access must use the following link to view the Calendar.</i> <a href="https://www.fleetscape.qfleet.qld.gov.au/ums/calendar">https://www.fleetscape.qfleet.qld.gov.au/ums/calendar</a>
Client Administrator application	Application to configure UMS, add, modify or delete users, PMOs and pools. Available only to users with Client Administrator access.
PMO	Pooling Management Office. This is a physical location and is usually the location where the fleet keys are kept.
Pools	Each location (PMO) can include one or more pools to manage their vehicles e.g. General pool, Restricted pool, Ute pool, Bus-support pool, Hospital North car park etc.
Role	Defines the level of access when creating or modifying users in the Client Administrator application: <ul style="list-style-type: none"> <li>• Client Administrator - Full access to the Client Administration Application.</li> <li>• Driver - Base level access limited to booking requests for vehicles using the Booking Application.</li> <li>• PMO Manager - Pooling Management Office Manager. Full access to the Calendar Application. Allocate bookings to vehicles, amend and delete bookings and create new bookings in the calendar.</li> <li>• PMO Officer - Pooling Management Office Officer. ‘View-only’ access to the Calendar application with the ability to check vehicles in and out.</li> </ul> Refer to the UMS Role Matrix at the end of this document for full details of which task and role applies to which level of access.
SAM	The QFleet Senior Account Manager.
UMS Monitor	Exports information collected by the UMS, through each of its three applications, in an Excel format for further analysis of fleet utilisation.

## 5 How data is managed in the UMS

It is important to understand that although different roles use different UMS applications, almost all data entered in each application is utilised in another, in some way e.g. when a driver creates

a Booking Request, the user, default PMO of the user, and the vehicle selected was entered in the Client Administrator application.

## 6 Optimising vehicle utilisation in your organisation

All users should be aware of the following information regarding vehicle and fleet utilisation. Agencies are required to use UMS as part of the QFleet Fleet Efficiency and Utilisation Policy for the Queensland Government motor vehicle fleet (the FE&U Policy). Visit HPW website to view or download the policy

<http://www.hpw.qld.gov.au/Vehicles/VehiclesForGovt/Pages/Policies.aspx>

### 6.1 How the UMS can optimise vehicle utilisation?

The UMS can help to optimise vehicle utilisation by reducing over and underutilisation. Overutilisation results in excess cost and kilometre charges, while underutilisation results in unnecessary waste of leases. The UMS can help reduce over and underutilisation in a number of ways:

**PMO Managers (not Drivers), allocate vehicles.** This allows PMO Managers to fully manage and control the allocation of the most appropriate vehicle for the journey in terms of type of vehicle, availability and level of utilisation.

**View vehicle utilisation in real time.** The UMS Monitor provides you with the most up to date information about your fleet.

**Export data for further analysis.** The data collected by the UMS will be exported to an Excel spreadsheet using the UMS Monitor, to analyse a number of aspects of your fleet.

### How to use UMS to best manage your fleet

Allocate vehicles appropriately. Select the right vehicle for the job and allocate more bookings to underutilised vehicles and fewer bookings to overutilised vehicles. For more information on allocating vehicles, refer to Vehicle Allocation in the Calendar Application User Guide. Regularly monitor the utilisation of vehicles. You will always have up-to-date fleet information which you can use to control utilisation.

Rotate vehicles between pools and locations. If a vehicle in one area is highly utilised, you can use the UMS to identify a similar underutilised vehicle in a different pool or location and rotate them to improve the utilisation of both. This will maximise the efficiency of your fleet. For more information on how to pool vehicles, refer to Pools, in the Calendar Application User Guide. Export data to Excel and analyse it on a monthly basis using the UMS Monitor. Client Administrators can analyse a number of aspects of your fleet to improve overall transport efficiency.

## 7 UMS navigation

Do not use the ENTER key when moving through fields in the UMS. Use the TAB key to move to the next field, or SHIFT/TAB to move up to a previous field.



Mandatory fields in UMS are identified by a red \* and must be populated or selected. You will not be able to save changes to the screen until this information is entered.

## 8 UMS structure

It is important to understand the structure of UMS and how it is setup in your organisation. Your QFleet SAM will assist you to understand the requirements and how the setup will affect the efficiency of your organisation’s utilisation of UMS, and assist your specific needs as much as possible.

### 8.1 About PMOs and Pools

The following overview information will assist to gain an understanding of how data is utilised in UMS.

- Within UMS, vehicles are grouped into pools. Pool naming convention varies but often uses the street address where its vehicles are located.
- Pools of vehicles are then grouped into what is called a Pool Management Office (PMO). A PMO is not necessarily an actual departmental site or office but is often utilised by some UMS administrators as an area, suburb or physical location. Its primary purpose within UMS is to give a name to a group of pools, and to link each user to a specified PMO. The PMO naming convention often uses the town or suburb name where the pools are located.
- Users of UMS are assigned to one PMO.
- PMO and Pool names must meet current naming conventions of your organisation. To establish or modify a PMO or Pool name, please refer to the relevant fleet and UMS administrators.

The following diagram is an example of a UMS setup with PMOs, Pools and Vehicles, and describes how vehicles may be utilised between both PMOs and Pools.

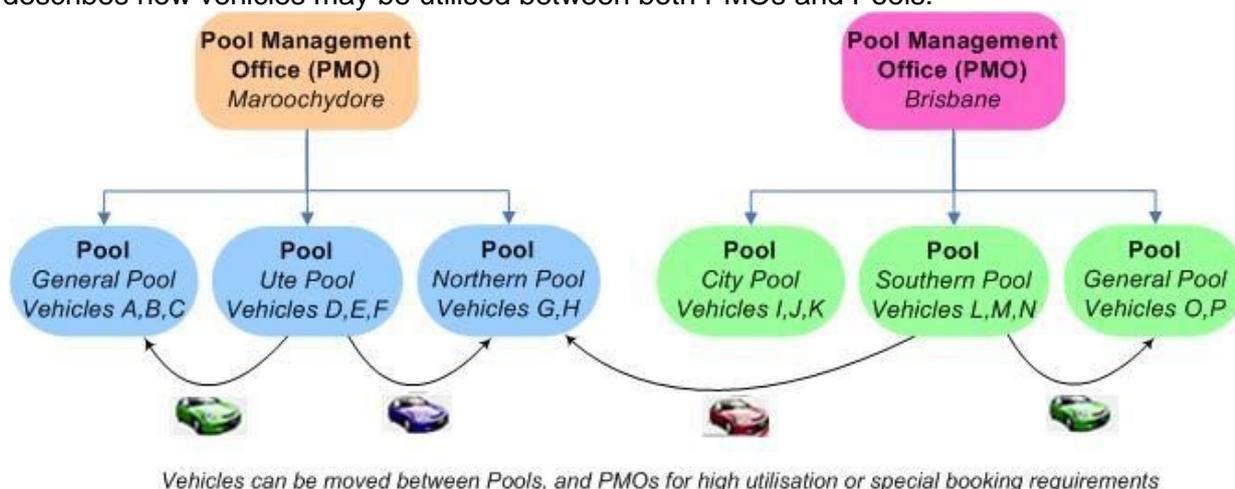


Figure 1– PMO and Pool Structure

## 8.2 UMS booking process diagram

The following process map explains the UMS booking process as relevant to UMS roles and access levels. Refer to the appropriate sections of each UMS User Guide for full instructions of each process.

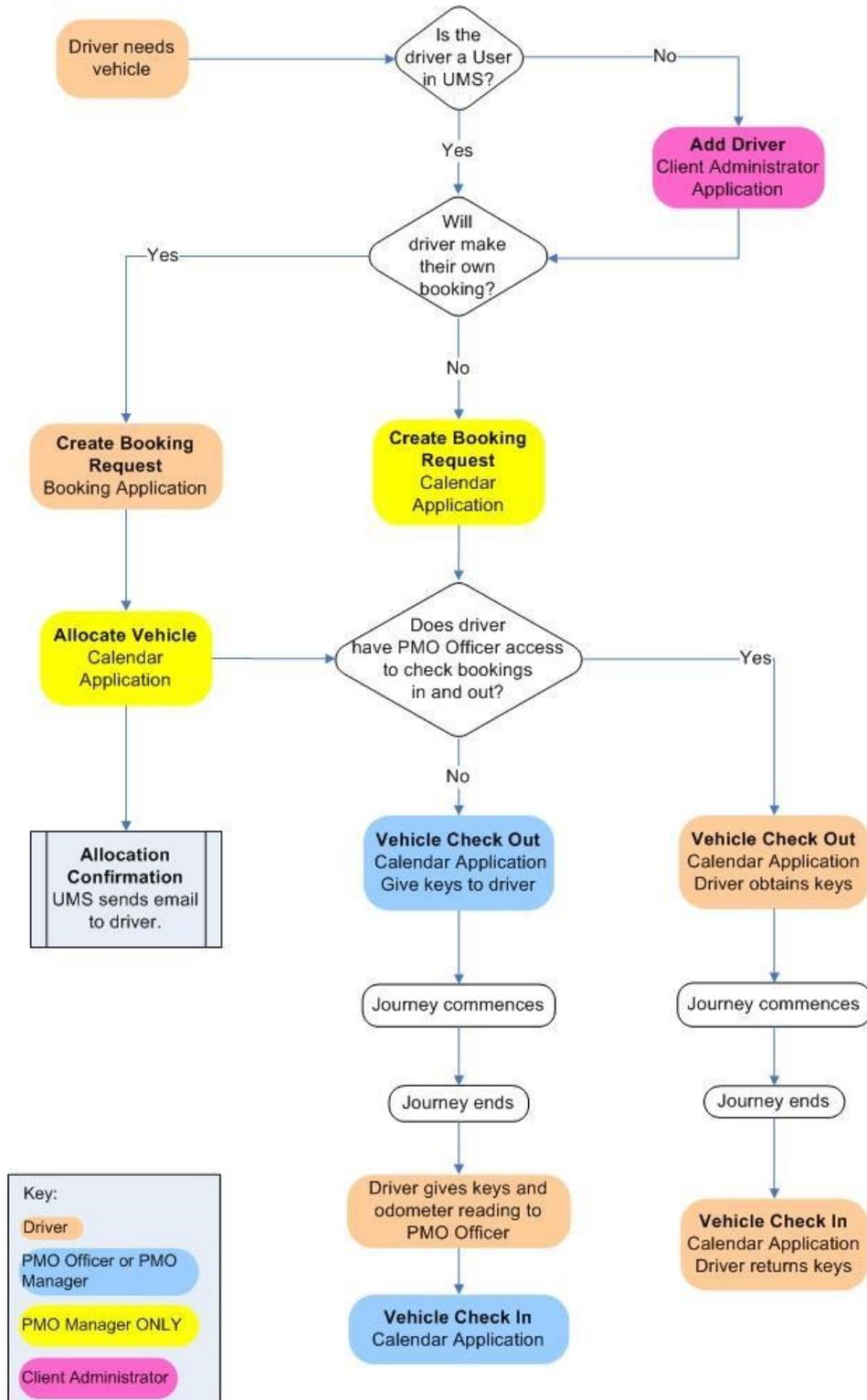


Figure 2 – UMS Booking Process Map

## 9 Support and implementation assistance

QFleet offers full support for the UMS. There is information available from several resources.

Always check all UMS User Guides first for solutions to your question before contacting support. If your question is still not answered contact the QFleet Systems Support team at [qfleet-utilisationmanagement@hpw.qld.gov.au](mailto:qfleet-utilisationmanagement@hpw.qld.gov.au) providing screenshots and screen names where possible, full details of your question, and defined details of your steps or call 07 3008 2607.

For implementation of the UMS, contact your Senior Account Manager (SAM) assigned to your organisation. Contact QFleet if you are unsure who your SAM is.

## 10 Accessing UMS

UMS can be accessed from <http://www.hpw.qld.gov.au/Vehicles/Pages/default.aspx> or depending on your access role, further URLs are available. To access UMS follow these steps:

- Client Administrator: <https://www.fleetscape.qfleet.qld.gov.au/ums/clientadmin>
- PMO Manager and PMO Officer: <https://www.fleetscape.qfleet.qld.gov.au/ums/calendar>
- Driver: <https://www.fleetscape.qfleet.qld.gov.au/ums/booking/list>

The above links may break if they are saved directly into your Internet Explorer Favourites menu. It is recommended that you log in to UMS from the HPW website at <http://www.hpw.qld.gov.au/Vehicles/Pages/default.aspx>. Then click on the Log in to QFleet systems and select the link appropriate to your access role.

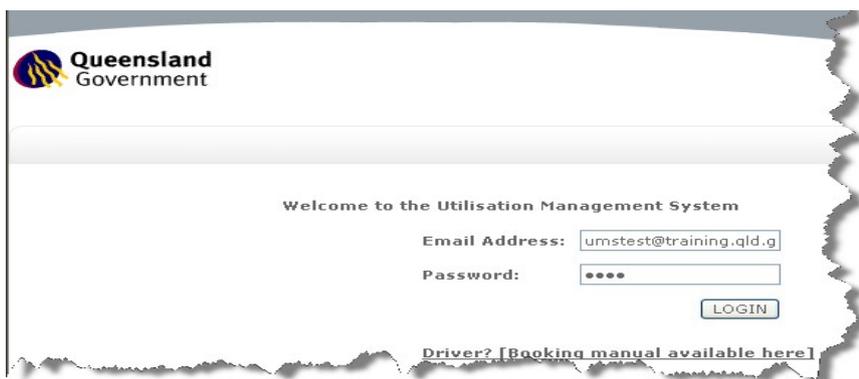
Save the URL from that screen to your Favourites menu for quick access in the future. The Welcome to the Utilisation Management System screen is displayed.

- On the Welcome to the Utilisation Management System screen, enter your Email Address and Password. You will have been supplied with a password on request for access.



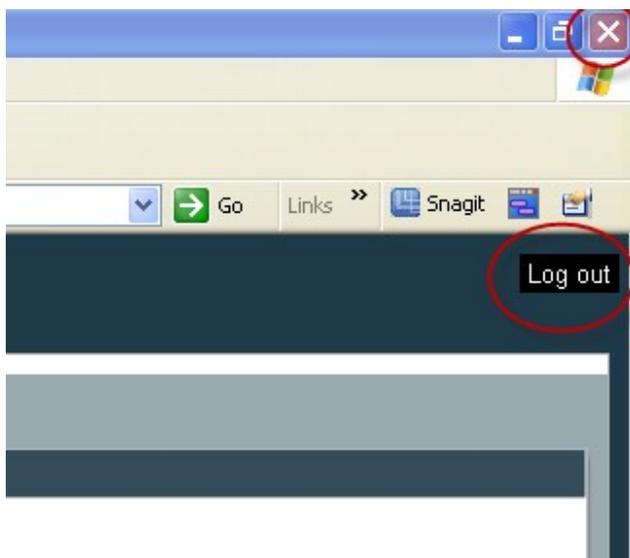
The Password is usually your Employee number. The password can be changed at a later date if required.

- Click on Login to access the UMS Access screen.



## 11 Logging Out of UMS

To log out of UMS click the red cross **X** on the browser window, or click Log out on the UMS screen.



## Appendix One - UMS user and role matrix

Application/Function	UMS Role			
	Driver	PMO Officer	PMO Manager	Client Admin
<b>Booking Application</b>				
Access to Booking application	✓			
Create a booking	✓			
View own current vehicle bookings and status	✓			
View and update own submitted bookings	✓			
View and Cancel own submitted bookings	✓			
<b>Calendar Application</b>				
Access to Calendar application		✓	✓	
View and functionality as per roles – all PMO's (Pools, Vehicles, Bookings) in Queensland		✓	✓	
Basic View – vehicle details and some booking details; status of vehicles and bookings		✓		
View all details – vehicles and bookings			✓	
Add function			✓	
Move vehicle to another Pool			✓	
Primary Driver Icon – View		✓	✓	
Primary Driver Settings - Times			✓	
Primary Driver Settings – Odometer Input			✓	
<b>Vehicle Allocation:</b>				
Unallocated bookings – View unallocated bookings. Allocate vehicles			✓	
Allocated booking - Check Out		✓	✓	
Allocated booking - Cancel			✓	
Allocated booking - Amend			✓	
Allocated booking - Change vehicle			✓	
Allocated booking - Complete			✓	
Allocated booking - Unallocate			✓	
Active booking – Check In		✓	✓	
Active booking – Amend			✓	
Completed booking - Amend			✓	
<b>Client Administrator Application</b>				
Access to Client Administrator application				✓
Users – Access level, Search, New, Modify, Delete				✓
Vehicles – Search, New, Modify, Delete				✓

PMO – New, Modify, Delete				✓
Create a Primary Driver				✓
<b>Monitor Application</b>				
View '90-day' on-screen statistics (Vehicle, Pool, PMO)				✓
Export booking details to Excel				✓