

# Training Outline

## ARCHIBUS/FM Web Central

### Motor Fleet



# Motor Fleet Forms

Before you reserve or claim a vehicle, you need to fill out and read two forms within Archibus: The Pre-Authorization Checklist and the Legal-Accident Procedures.

These forms will help ensure that you understand the responsibilities for using a Motor Fleet vehicle, as well as what to do in case you are involved in an accident.

# Pre-Authorization Checklist/ Legal-Accident Procedures

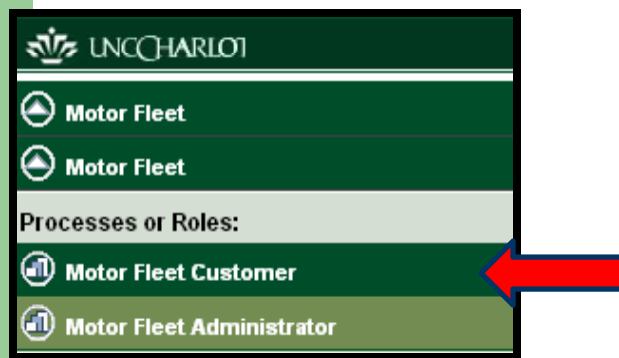
- 1.) In order to access these forms, login to Archibus. Then click the Motor Fleet Activity button.
- 2.) Next, select the Motor Fleet Customer role.
- 3.) In the Forms section click on Pre-Authorization Checklist or Legal-Accident Procedures
- 4.) A pop up window will appear, asking if you want to display non-secure items. Click the Yes button.
- 5.) The forms will appear in the right window as a PDF file, so you will be able to print or save the forms to your computer.
- 6.) Once you have finished reviewing these forms, log out of Archibus by closing your web browser.

**\*Note:** You need to fill out a Pre-Authorization Checklist every time you reserve a vehicle.\*

# Logging into Archibus



1.) After logging into Archibus, select the Motor Fleet Activity button



2.) Then, click on the Motor Fleet Customer role

# Selecting a Form



UNC-CHARLOT

- Motor Fleet
- Motor Fleet
- Motor Fleet Customer

Tasks:

**Forms**

- Pre-Authorization Checklist
- Legal - Accident Procedures

**Actions**

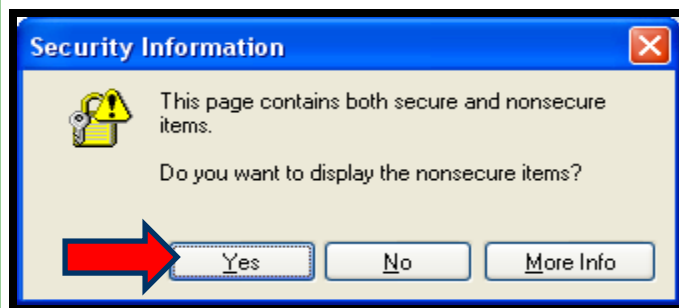
- Motor Fleet Vehicle Rates
- Request a Vehicle
- Cancel Vehicle Reservation
- Review Reservations

**Reports**


- Reservations History
- Review Motor Fleet Log History

3.) In the Forms section, select Pre-Authorization Checklist

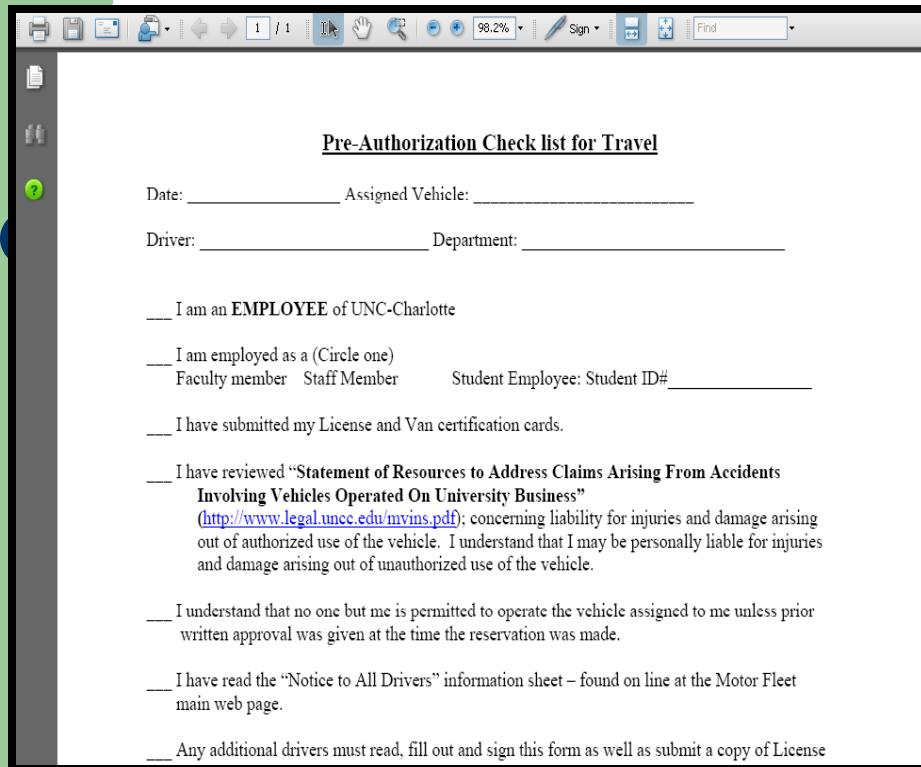
4.) A pop up window will appear, asking if you want to display non-secure items. Click the Yes button.



Security Information

 This page contains both secure and nonsecure items.  
Do you want to display the nonsecure items?

# Pre-Authorization Checklist



Pre-Authorization Check list for Travel

Date: \_\_\_\_\_ Assigned Vehicle: \_\_\_\_\_

Driver: \_\_\_\_\_ Department: \_\_\_\_\_

I am an **EMPLOYEE** of UNC-Charlotte

I am employed as a (Circle one)  
Faculty member    Staff Member    Student Employee: Student ID# \_\_\_\_\_

I have submitted my License and Van certification cards.

I have reviewed "Statement of Resources to Address Claims Arising From Accidents Involving Vehicles Operated On University Business" (<http://www.legal.uncc.edu/mvins.pdf>); concerning liability for injuries and damage arising out of authorized use of the vehicle. I understand that I may be personally liable for injuries and damage arising out of unauthorized use of the vehicle.

I understand that no one but me is permitted to operate the vehicle assigned to me unless prior written approval was given at the time the reservation was made.

I have read the "Notice to All Drivers" information sheet – found on line at the Motor Fleet main web page.

Any additional drivers must read, fill out and sign this form as well as submit a copy of License

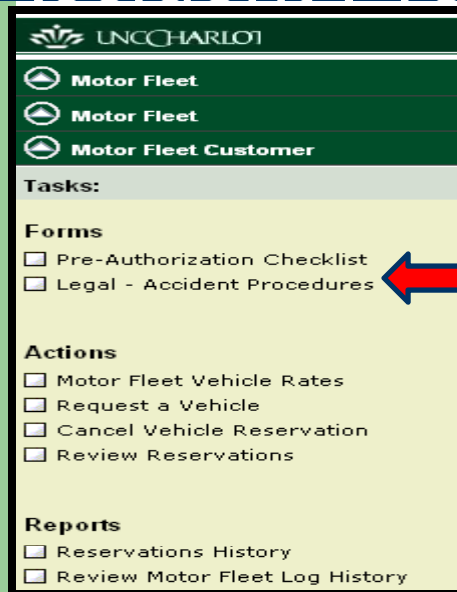
5.) The form for Pre-Authorization Checklist will appear in the window on the right side of the screen.

6.) The form is a PDF file, so you will be able to print or save it to your computer. Once you fill out the checklist, be sure to turn it into Kathy Fisher (FM/Police, Front Desk) before picking up your vehicle.



# Selecting a Form

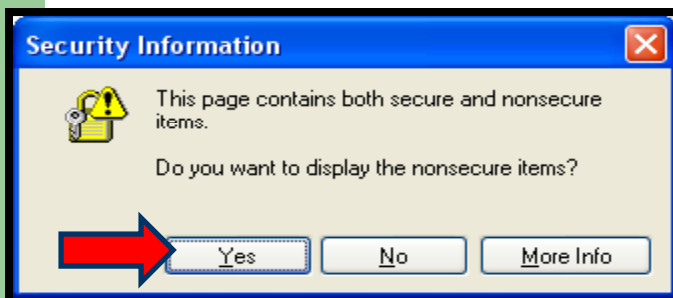
7.) Next, you need to access the Legal-Accident Procedures form.



The screenshot shows the UNC-CHARLOT web application interface. At the top, there is a navigation menu with three items: 'Motor Fleet', 'Motor Fleet', and 'Motor Fleet Customer'. Below the menu is a 'Tasks:' section with three sub-sections: 'Forms', 'Actions', and 'Reports'. Under 'Forms', there are two items: 'Pre-Authorization Checklist' and 'Legal - Accident Procedures'. A red arrow points to the 'Legal - Accident Procedures' item. Under 'Actions', there are four items: 'Motor Fleet Vehicle Rates', 'Request a Vehicle', 'Cancel Vehicle Reservation', and 'Review Reservations'. Under 'Reports', there are two items: 'Reservations History' and 'Review Motor Fleet Log History'.

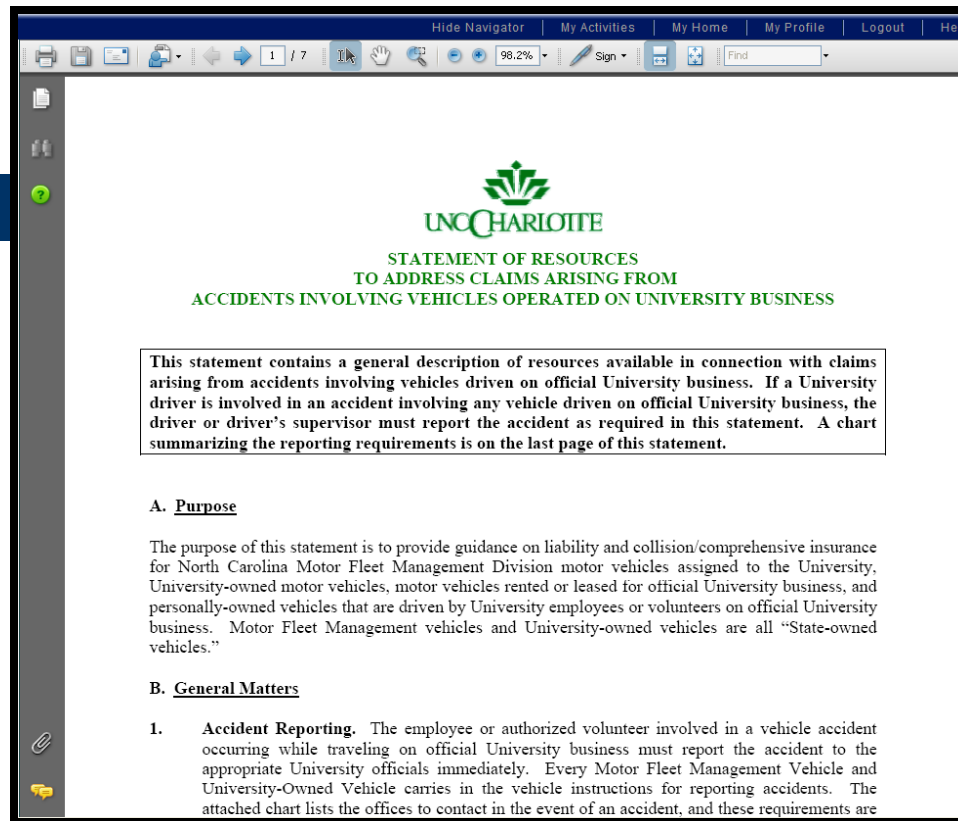
8.) In the Forms section, click on Legal-Accident Procedures.

A pop up window will appear asking if you want to display non-secure items. Click the Yes button.



The screenshot shows a 'Security Information' pop-up window. The window has a blue title bar with the text 'Security Information' and a close button (X). The main content area has a yellow warning icon (a triangle with an exclamation mark) and the text: 'This page contains both secure and nonsecure items. Do you want to display the nonsecure items?'. At the bottom of the window, there are three buttons: 'Yes', 'No', and 'More Info'. A red arrow points to the 'Yes' button.

# Legal-Accident Procedures Form



The screenshot shows a web browser window with the UNCC Charlotte logo and the title "STATEMENT OF RESOURCES TO ADDRESS CLAIMS ARISING FROM ACCIDENTS INVOLVING VEHICLES OPERATED ON UNIVERSITY BUSINESS". The browser's address bar shows "1 / 7" and "96.2%". The page content includes a summary box, a "Purpose" section, and a "General Matters" section with a numbered list.

UNCC CHARLOTTE

STATEMENT OF RESOURCES  
TO ADDRESS CLAIMS ARISING FROM  
ACCIDENTS INVOLVING VEHICLES OPERATED ON UNIVERSITY BUSINESS

This statement contains a general description of resources available in connection with claims arising from accidents involving vehicles driven on official University business. If a University driver is involved in an accident involving any vehicle driven on official University business, the driver or driver's supervisor must report the accident as required in this statement. A chart summarizing the reporting requirements is on the last page of this statement.

**A. Purpose**

The purpose of this statement is to provide guidance on liability and collision/comprehensive insurance for North Carolina Motor Fleet Management Division motor vehicles assigned to the University, University-owned motor vehicles, motor vehicles rented or leased for official University business, and personally-owned vehicles that are driven by University employees or volunteers on official University business. Motor Fleet Management vehicles and University-owned vehicles are all "State-owned vehicles."

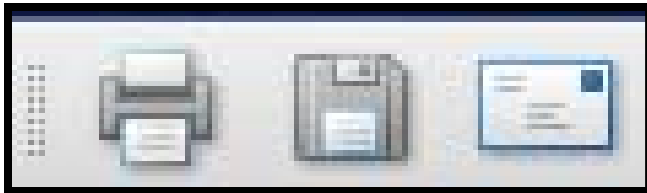
**B. General Matters**

- 1. Accident Reporting.** The employee or authorized volunteer involved in a vehicle accident occurring while traveling on official University business must report the accident to the appropriate University officials immediately. Every Motor Fleet Management Vehicle and University-Owned Vehicle carries in the vehicle instructions for reporting accidents. The attached chart lists the offices to contact in the event of an accident, and these requirements are

9.) The form will appear in the right window. You do not need to fill out anything on this form, but it is very important that you read it and keep a copy for reference.


## Saving/Printing the Form

10.) This form is also PDF file, so you will be able to print or save it to your computer.



11.) Once you have printed out or saved the forms, you can create a vehicle request or log out of Archibus by closing your web browser.

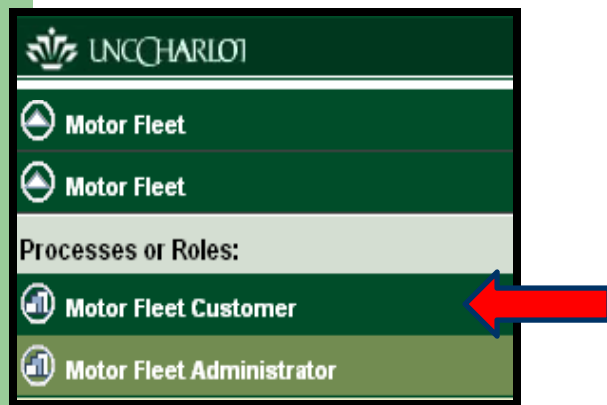
# Motor Fleet Reservation System

- 1.) After logging into Archibus, select the Motor Fleet Activity button. Then click on the Motor Fleet Customer role.
- 2.) In the Actions section, select Request a Vehicle. You will then see the form for requesting a vehicle on the right side of the screen.  
**Note:** Before you submit a form, it is very important that you fill out as many fields as possible in order for Facilities to efficiently complete your Vehicle Request. You especially need to fill in the fields that have a **red asterisk** next to them.
- 3.) To fill in each field, select the ellipses button (  ) or type the appropriate information into each input box.
  - If a field has blue text, you can only use the ellipses button, but if a field has grey text it is not validated; you can type the information in the input box.
- 4.) Once you have filled out the primary fields of the vehicle request, select the type of vehicle that you would like, as well as if you will be travelling in or out of the state.
- 5.) If you need to, please fill out any specific details in the Requestor Remarks input box; this will help Facilities complete your vehicle request.  
*Ex: Although I am requesting a car, I will be carrying a lot of equipment. I need a car with a large trunk or passenger space.*
- 6.) After you are finished entering all of the information in the fields, remember to **review the vehicle request** and make sure that everything is entered correctly. Then click the Submit button.
- 7.) After you click Submit, you will be taken to a review page on the right side of the screen. This page will list all of the information you have entered, as well as a work request code that you will be able to use for future reference. You are also welcome to print out the Review page for future reference.
- 8.) If you need to, you can create another vehicle request, or if you are finished, you can log out of Archibus by closing your web browser.

# Logging into Archibus

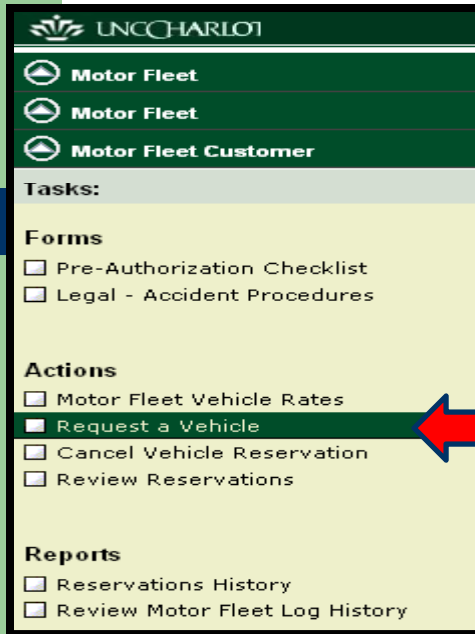


1.) After logging into Archibus, select the Motor Fleet Activity button.



2.) Next, click the Motor Fleet Customer role.

# Requesting a Vehicle



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Motor Fleet

Motor Fleet

Motor Fleet Customer

Tasks:

Forms

- Pre-Authorization Checklist
- Legal - Accident Procedures

Actions

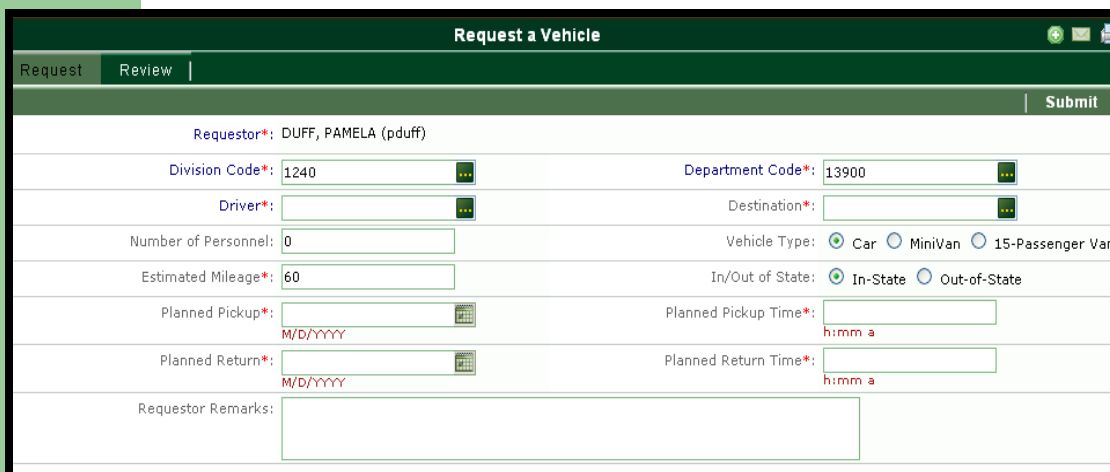
- Motor Fleet Vehicle Rates
- Request a Vehicle
- Cancel Vehicle Reservation
- Review Reservations

Reports

- Reservations History
- Review Motor Fleet Log History

3.) In the Actions section, select the Request a Vehicle task.

4.) You will then see the form for requesting a vehicle appear on the right side of the screen.



Request a Vehicle

Request | Review | Submit

Requestor\*: DUFF, PAMELA (pduff)

Division Code\*: 1240 Department Code\*: 13900

Driver\*: Destination\*:

Number of Personnel: 0 Vehicle Type:  Car  MiniVan  15-Passenger Van

Estimated Mileage\*: 60 In/Out of State:  In-State  Out-of-State

Planned Pickup\*: Planned Pickup Time\*: h:mm a

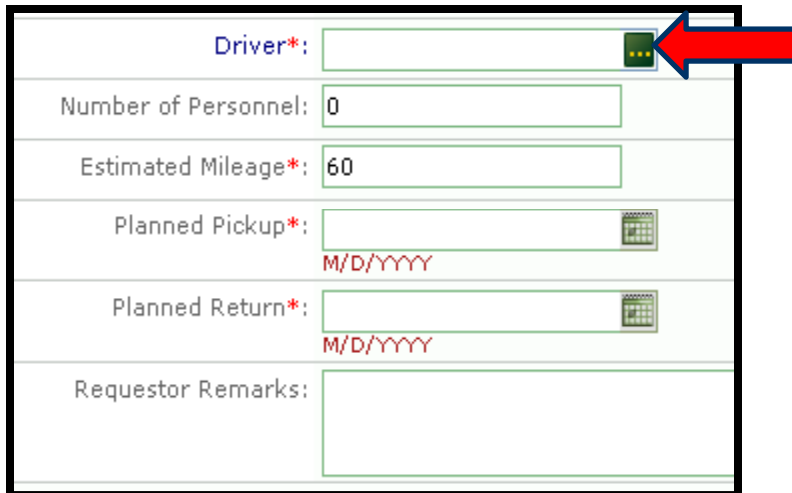
Planned Return\*: Planned Return Time\*: h:mm a

Requestor Remarks:

# Filling out a Vehicle Request

5.) Before you submit the form, it is very important that you fill out as many fields as possible in order for Facilities to efficiently complete your Vehicle Request. You especially need to fill in the fields that have a red asterisk next to them.

Note: Your name, dept. code and division code will automatically be entered into the form



The image shows a screenshot of a web form for a vehicle request. The form contains several input fields:

- Driver\*:** An empty text input field with a small green ellipsis button (three dots) to its right. A red arrow points to this button.
- Number of Personnel:** A text input field containing the number "0".
- Estimated Mileage\*:** A text input field containing the number "60".
- Planned Pickup\*:** A date selection field with a calendar icon and the placeholder text "M/D/YYYY".
- Planned Return\*:** A date selection field with a calendar icon and the placeholder text "M/D/YYYY".
- Requestor Remarks:** A large, empty text area for additional comments.

6.) To enter the driver in the form, click on the ellipses button located directly next to the input box.

# Selecting a Driver


7.) A window will pop up providing you a list of the employees at UNCC.

Employee Name: A [209] B [532] C [412] D [252] E [101] F [205] G [288] H [432] I [28] J [184] K [222] L [267] M [468] N [110] O [76] P [292]  
Q [13] R [271] S [588] T [217] U [18] V [72] W [333] X [20] Y [41] Z [51] All [5708]


Employee Name	Division Code	Department Code	Employee Telephone	Email Address
ABBOTT, CHRISTINE (cmabbot1)	1310	15200	7046874037	cmabbot1@uncc.edu
ABBOTT, SHANTI (sabbott2)	1050	10601	7046873655	sabbott2@uncc.edu
ABBOTT-MCCLLOUD, TINA (tlabbott)	1820	21200	7045481802	tlabbott@uncc.edu
ABERNATHY, DONALD (dabern10)	2280	26200	7046878860	dabern10@uncc.edu
ABERNETHY, JEFFREY (jabern15)	2620	28600	7045999172	jabern15@uncc.edu
ABERNETHY, KIM (kabernet)	2620	28600	7045999172	kaberne1@uncc.edu
ABIFAKER, ANAHID (aabifake)	1560	18400	7046878760	aabifake@uncc.edu
ABIFAKER, RIYAD (rabifake)	1560	18400	7046878758	rabifake@uncc.edu
ABOLBASHARI, MEHRDAD (mabolbas)	1890	22000	7048409332	mabolbas@uncc.edu
ABORISADE, OLADIMEJI (oaborisa)	1430	17100	7046872441	oaborisa@uncc.edu
ABPLANALP, KEVIN (kabplana)	1620	19100	7043078975	kabplana@uncc.edu
ABRACZINSKAS, MICHELLE (mabraczi)	1620	19100	5702042820	mabraczi@uncc.edu
ABRAHAM, LATOYA (labraha5)	1410	16900	7349723331	labraha5@uncc.edu
ABRAMS, LYNDON (lpabrams)	1795	20950	7046878964	lpabrams@uncc.edu
ABSHER, JEREMY (jcabsher)	1630	19200	3366673958	jcabsher@uncc.edu
ABT-BUMGARNER, SAMANTHA (sabtbum)	2280	26200	7046878605	sabtbum@uncc.edu
ACHARYA, IPSITA (iacharya)	1880	21900	4129809536	iacharya@uncc.edu
ACHARYA, KAVAN (kacharya)	1600	18800	7045035137	kacharya@uncc.edu
ACIE, KYLA (kacie)	1650	19400	7046877714	kacie@uncc.edu
ACKER, LORRAINE (ldacker)	2610	28500	7046872541	ldacker@uncc.edu
ACOSTA LOPEZ, DANIEL (doacosta)	1660	19600	7046712189	doacosta@uncc.edu
ADAMS, ANGELIA (aaadams)	2080	24200	7046873837	aaadams@uncc.edu
ADAMS, CHARLES (cdadams1)	1260	14800	7046875985	cdadams1@uncc.edu
ADAMS, CHASITY (ckadams)	2720	29900	7046872103	ckadams@uncc.edu
ADAMS, EDWARD (edadams)	2370	27200	7046875704	edadams@uncc.edu
ADAMS, JACOB (jadams2)	2700	29700	3366703492	jadams2@uncc.edu

# Filtering the Employee List

- If you need to, you can sort the list by typing information in the input boxes and then click the down filter button

Employee Name ▲	Division Code	Department Code	Employee Telephone	Email Address	Filter
<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	

- Or, you can click the column title headings. This will sort the list alphabetically or numerically.

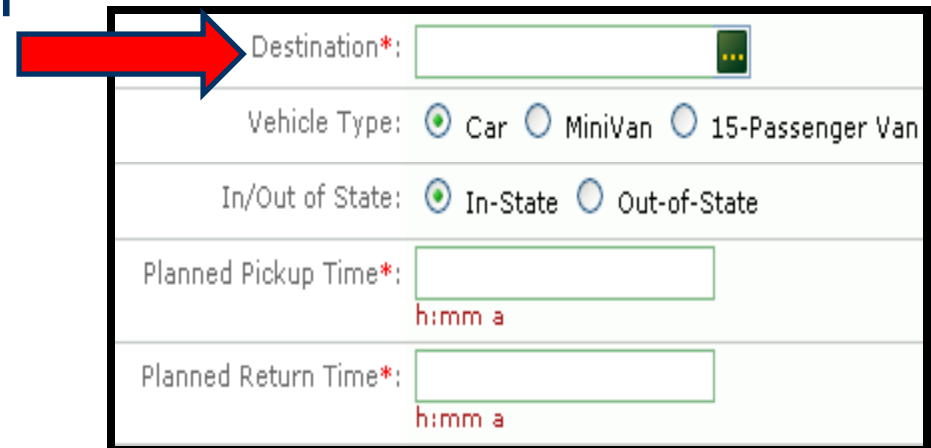
Employee Name	Division Code	Department Code	Employee Telephone	Email Address	Filter
<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	

# Entering Destination

8.) Once you have found the employee name needed, click on it. It will automatically be entered into the field.

9.) Repeat Steps 7 & 8 for Destination.

**Note:** If your destination does not appear in the list, you can type it in the input box.



A screenshot of a web form with a black border. A red arrow points to the 'Destination\*' field, which is an empty text box with a dropdown arrow icon on the right. Below it are three rows of radio button options: 'Vehicle Type' with 'Car' (selected), 'MiniVan', and '15-Passenger Van'; 'In/Out of State' with 'In-State' (selected) and 'Out-of-State'; and two 'Planned Pickup Time\*' and 'Planned Return Time\*' fields, each with a time format 'h:mm a' below it.

Destination*:	<input type="text"/>
Vehicle Type:	<input checked="" type="radio"/> Car <input type="radio"/> MiniVan <input type="radio"/> 15-Passenger Van
In/Out of State:	<input checked="" type="radio"/> In-State <input type="radio"/> Out-of-State
Planned Pickup Time*:	<input type="text"/> h:mm a
Planned Return Time*:	<input type="text"/> h:mm a

# Filling out the Request Form

Requestor\*: DUFF, PAMELA (pduff)

Division Code\*: 1240

Driver\*:

Number of Personnel: 2

Estimated Mileage\*: 60

Planned Pickup\*: M/D/YYYY

Planned Return\*: M/D/YYYY

10.) You now need to enter the number of personnel as well as the estimated mileage that you will drive. Note: The minimum miles, which is 60, will automatically display.

Planned Pickup\*: M/D/YYYY

Planned Return\*: M/D/YYYY

11.) Next, you need to enter the dates and times for your planned pick up and return of the vehicle.

Planned Pickup\*: M/D/YYYY

Plan

Request

Sun	Mon	Tue	Wed	Thur	Fri	Sat
		1	2	3	4	5
6	7	8	9	10	11	12
13	14	15	16	17	18	19
20	21	22	23	24	25	26
27	28	29	30			

Today Close

**Note:** If you need to see a calendar, click on the calendar button to the right of the planned pick-up date/return input box

# Requestor Remarks

Requestor Remarks:

12.) If you need to, add specific details in the Requestor Remarks input box; this will assist Facilities complete your vehicle request.

Ex: Although I am requesting a car, I will be carrying a lot of equipment. I need a car with a large trunk or passenger space.

# Submitting the Request

**Request a Vehicle**

Request | **Review** | **Submit**

Requestor\*: DUFF, PAMELA (pduff)

Division Code\*: 1240 Department Code\*: 13900

Driver\*: DINELLO, RAYMOND (rdin) Destination\*: Kannapolis, NC

Number of Personnel: 2 Vehicle Type:  Car  MiniVan  15-Passenger Van

Estimated Mileage\*: 75 In/Out of State:  In-State  Out-of-State

Planned Pickup\*: 11/4/2009 (November 4, 2009) Planned Pickup Time\*: 8:00 (8:00 AM)

Planned Return\*: 11/4/2009 (November 4, 2009) Planned Return Time\*: 5:00 (5:00 PM)

Requestor Remarks: Although I am reserving a car, we will be carrying a lot of computer equipment. We need a car with a large amount of truck space to accommodate this equipment.

13.) After you have finished entering all of the information in the fields, remember to review the vehicle request and make sure that everything has been entered correctly. Then click the Submit button.

# Reviewing Vehicle Request

Request a Vehicle	
Request	Review
Reservation Number:	102500
Work Request Code:	2010012064
Requestor*:	DUFF, PAMELA (pduff)
Division Code:	1240
Department Code:	13900
Driver*:	DINELLO, RAYMOND (rdinello)
Destination*:	Kannapolis, NC
Number of Personnel:	2
Requested Vehicle Type:	Car
Estimated Mileage*:	75
In/Out State:	In
Planned Pickup*:	November 4, 2009
Planned Pickup Time:	08:00
Planned Return*:	November 4, 2009
Planned Return Time:	17:00
Requestor Remarks:	Although I am reserving a car, we will be carrying a lot of computer equipment. We need a car with a large amount of truck space to accommodate this equipment.

- 14.) You will then be taken to a review page display on the right side of the screen. This page will list all of the information you have entered, as well as a work request code that you will be able to use for future reference. You are also welcome to print out the Review page for future reference.
- 15.) If you need to, you can create another vehicle request, or if you are finished, you can log out of Archibus by closing your web browser.

# How to Cancel a Vehicle Request

1.) After logging into Archibus, select the Motor Fleet Activity button. Then click the Motor Fleet Customer role.

2.) In the Actions section, click on Cancel Vehicle Reservation. You will see 2 separate windows appear. You now need to find your vehicle reservation.

3.) In the Reservations window, scroll to the right and click on the small plus sign ().

This will open a mini console that will help you search for your reservation if you have several listed.

- You can type in information in the appropriate input box and click on the filter button, or you can click on the small grey buttons to the right of each column title. This will sort the list alphabetically or numerically.

4.) Once you have found your vehicle request, click on it. It will appear in the Cancel Vehicle Request window.

5.) To cancel the vehicle request, click on the Cancel Request button.

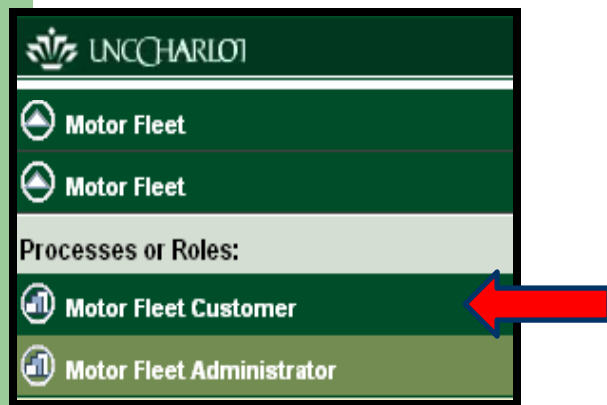
**\*Note:** Motor Fleet requires a 24 hour cancellation notification; a daily minimum charge will be applied for cancellations within this time frame as well as no show pick ups.\*

6.) If you need to, you can cancel another vehicle request, or if you are finished, log out of Archibus by closing your web browser.

# Logging into Archibus



1.) After logging into Archibus, select Motor Fleet Activity button.



2.) Next, click on the Motor Fleet Customer role.

# Cancel Vehicle Reservation

LNC-CHARLOT

- Motor Fleet
- Motor Fleet
- Motor Fleet Customer

Tasks:

Forms

- Pre-Authorization Checklist
- Legal - Accident Procedures

Actions

- Motor Fleet Vehicle Rates
- Request a Vehicle
- Cancel Vehicle Reservation
- Review Reservations

Reports

- Reservations History
- Review Motor Fleet Log History

3.) In the Actions section, click on Cancel Vehicle Reservation.

4.) You will then see two separate windows appear: The Reservations window and the Cancel Vehicle Request window.

Planned Pickup	Driver	Destir
10/21/2009	DUFF, PAMELA (pdut)	Kannap
11/4/2009	DINELLO, RAYMOND (rdnelk)	Kannap

# Finding Reservations

Reservations			
Planned Pickup ▲	Driver ■	Destination ■	+
10/21/2009	DUFF, PAMELA (pduff)	Kannapolis, NC	
11/4/2009	DINELLO, RAYMOND (rdinello)	Kannapolis, NC	

Reservations			
Planned Pickup ▲	Driver ■	Destination ■	☐
<input type="text"/>	<input type="text"/>	<input type="text"/>	⏴ ⏵
10/21/2009	DUFF, PAMELA (pduff)	Kannapolis, NC	
11/4/2009	DINELLO, RAYMOND (rdinello)	Kannapolis, NC	

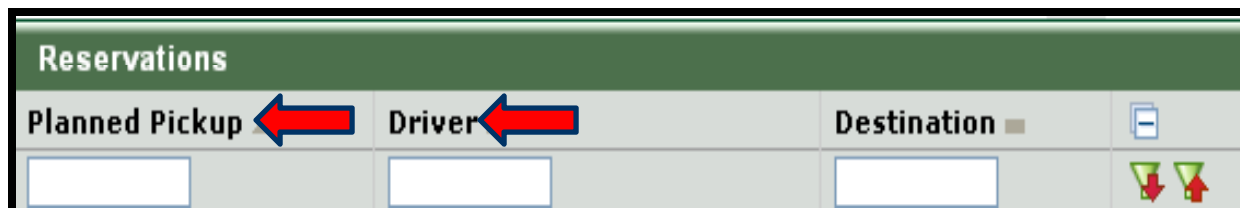
- 5.) You will now need to find your vehicle request. In the Reservations window, scroll to the right and click on the small plus sign. This will open a mini console so you can search for your reservation.

# Sorting Reservations

6.) You can sort the list of reservations by typing in the input boxes and then clicking the filter button



- Or you can click on the column titles directly to organize the reservations either alphabetically or numerically.



# Vehicle Request Details

Reservations			
Planned Pickup ▲	Driver ■	Destination ■	
10/21/2009	DUFF, PAMELA (pduff)	Kannapolis, NC	
11/14/2009	DINELO, RAYMOND (rdinello)	Kannapolis, NC	

Cancel Vehicle Request		Cancel Request
Requestor*: DUFF, PAMELA (pduff)		
Division Code: 1240	Department Code: 13900	
Driver*: DINELO, RAYMOND (rdinello)	Destination*: Kannapolis, NC	
Number of Personnel: 2	Requested Vehicle Type: Car	
Estimated Mileage*: 75	In/Out State: In	
Planned Pickup*: November 4, 2009	Planned Pickup Time: 08:00	
Planned Return*: November 4, 2009	Planned Return Time: 17:00	
Requestor Remarks:	Although I am reserving a car, we will be carrying a lot of computer equipment. We need a car with a large amount of truck space to accommodate this equipment.	

- 7.) Once you have found your vehicle request, click on it. The vehicle request details will then display in the Cancel Vehicle Request window.

# Canceling the Vehicle




Cancel Vehicle Request		Cancel Request
Requestor*: DUFF, PAMELA (pduff)		
Division Code: 1240	Department Code: 13900	
Driver*: DINELLO, RAYMOND (rdinello)	Destination*: Kannapolis, NC	
Number of Personnel: 2	Requested Vehicle Type: Car	
Estimated Mileage*: 75	In/Out State: In	
Planned Pickup*: November 4, 2009	Planned Pickup Time: 08:00	
Planned Return*: November 4, 2009	Planned Return Time: 17:00	
Requestor Remarks:	<input type="text" value="Although I am reserving a car, we will be carrying a lot of computer equipment. We need a car with a large amount of truck space to accommodate this equipment."/>	

8.) If you would like to cancel the vehicle request, click on the Cancel button

**\*Note:** Motor Fleet requires a 24 hour cancellation notification; a daily minimum charge will be applied for cancellations within this time frame as well as for no show pick ups.\*

9.) If you need to, you can cancel another vehicle request, or if you are finished, log out of Archibus by closing your web browser.

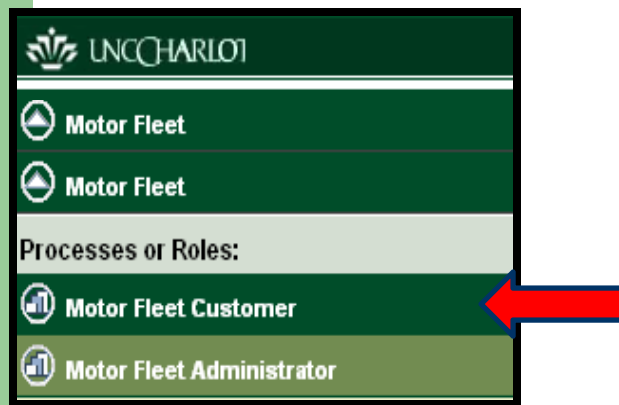
# How to View Vehicle Reservations

- 1.) After logging into Archibus, select the Motor Fleet Activity button. Next, click on the Motor Fleet Customer role.
- 2.) In the Actions section, click on Review Reservations. You will see a list of all the active Motor Fleet Reservations appear.
- 3.) If you need to sort the list or locate a specific vehicle request, scroll to the right and select the small plus sign (). This will open a mini console that will help you look for your reservation.
  - You can type in information in the appropriate input box and click on the filter button, or you can click on the small grey buttons to the right of each column title. This will sort the list alphabetically or numerically.
- 4.) You can also export the entire list to Microsoft Excel or a PDF by click on the Excel () or PDF () buttons. A window will pop up displaying the entire list and you are welcome to print it out for your records.
- 5.) Once you are finished reviewing the vehicle reservations, you can log out of Archibus by closing your web browser.

# Logging into Archibus



1.) After logging into Archibus, select the Motor Fleet Activity button.



2.) Next, click the Motor Fleet Customer role.

# Review Reservations

LNCCHARLOT1

- Motor Fleet
- Motor Fleet
- Motor Fleet Customer

Tasks:

Forms

- Pre-Authorization Checklist
- Legal - Accident Procedures

Actions

- Motor Fleet Vehicle Rates
- Request a Vehicle
- Cancel Vehicle Reservation
- Review Reservations**

Reports

- Reservations History
- Review Motor Fleet Log History

3.) In the Actions section, click on the Review Reservations task.

Driver	Status	Destination	Number of Personnel	Requested Vehicle Type	Estimated Mileage	In/Out State	Planned Pickup	Planned Pickup Time	Planned Return	Planned Return Time	Requestor Remarks
DINELLO, RAYMOND (rdinello)	Requested	Kannapolis, NC	2	Car	75	In	11/4/2009	08:00 AM	11/4/2009	05:00 PM	Although I am reserving a d
DUFF, PAMELA (pduff)	Requested	Kannapolis, NC	1	Car	60	In	10/21/2009	08:00 AM	10/21/2009	05:00 PM	test

4.) You will then be able to view a list of all the active reservations in the right window.

# Searching for Vehicle Requests

Planned Return	Planned Return Time	Requestor Remarks
11/4/2009	05:00 PM	Although I am reserving a car, we will be carrying a lot of computer equipment. We need a car with a large amount of truck space to accommodate this equipment.
10/21/2009	05:00 PM	test

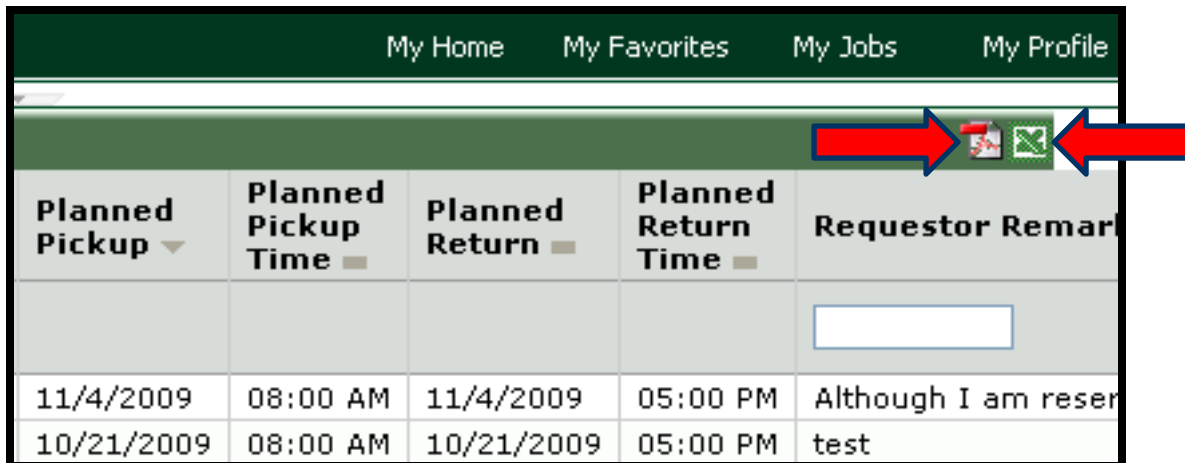
Active Reservations										
Driver	Status	Destination	Number of Personnel	Requested Vehicle Type	Estimated Mileage	In/Out State	Planned Pickup	Planned Pickup Time	Planned Return	Planned Return Time
DINELLO, RAYMOND (rdinello)	Requested	Kannapolis, NC	2	Car	75	In	11/4/2009	08:00 AM	11/4/2009	05:00 PM
DUFF, PAMELA (pduff)	Requested	Kannapolis, NC	1	Car	60	In	10/21/2009	08:00 AM	10/21/2009	05:00 PM

- 4.) If you need to sort the list or locate a specific vehicle request, scroll to the right and select the small plus sign. This will open a mini console that will help you look for your reservation.



## Exporting Reservations list

5.) You can also export the entire list to Microsoft Excel or a PDF by clicking on the Excel or PDF buttons. A window will pop up displaying the entire list and you are welcome to print it out for your records.



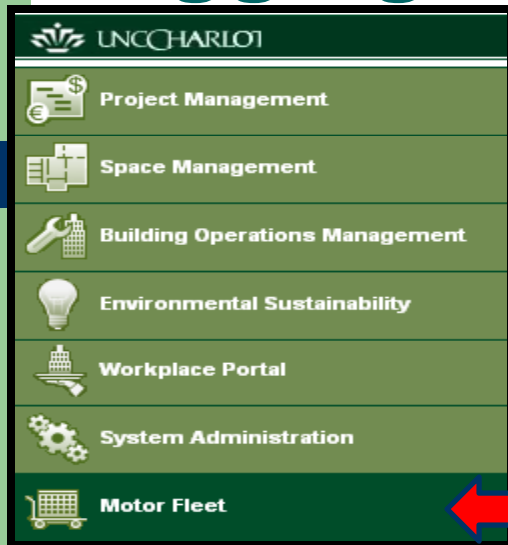
Planned Pickup	Planned Pickup Time	Planned Return	Planned Return Time	Requestor Remarks
11/4/2009	08:00 AM	11/4/2009	05:00 PM	Although I am reser
10/21/2009	08:00 AM	10/21/2009	05:00 PM	test

6.) Once you are finished reviewing the vehicle reservations, you can log out of Archibus by closing your web browser.

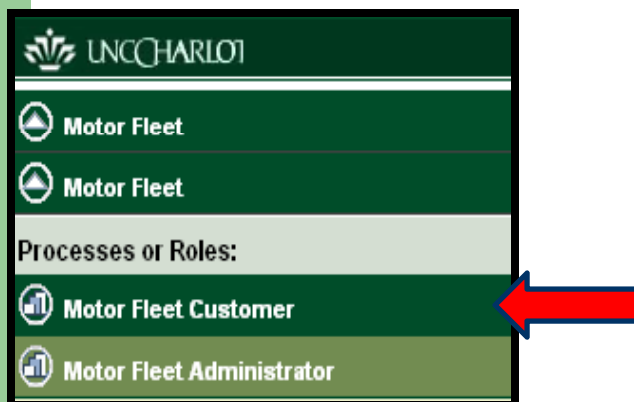
# Reservations History

- The Reservation History is a report that lists all of the in-active reservations that you requested or where you are the driver.
  - 1.) To access this report, login into Archibus. Then click on the Motor Fleet Activity button.
  - 2.) Next, select the Motor Fleet Customer role.
  - 3.) In the Reports section, select Reservations History. The report will appear in the right window and you will see a list of all the in-active Motor Fleet reservations.
  - 4.) If you need to sort the list or locate a specific vehicle request, scroll to the right and select the small plus sign (⊕). This will open a mini console that will help you look for your reservation.
    - You can type in information in the appropriate input box and click on the filter button, or you can click on the small grey buttons to the right of each column title. This will sort the list alphabetically or numerically.
  - 5.) You can also export the entire list to Microsoft Excel or a PDF by click on the Excel (📄) or PDF (📄) buttons. A window will pop up displaying the entire list and you are welcome to print it out for your records.
  - 6.) Once you are finished reviewing the reservations, you can log out of Archibus by closing your web browser.

# Logging into Archibus

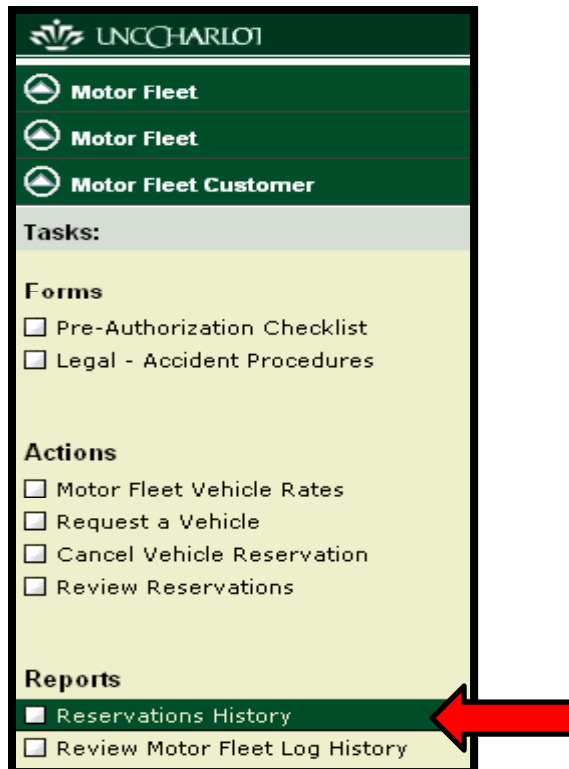


1.) After logging into Archibus, select the Motor Fleet Activity button



2.) Then click on the Motor Fleet Customer role

# Reservations History



UNC-CHARLOT

- Motor Fleet
- Motor Fleet
- Motor Fleet Customer

Tasks:

Forms

- Pre-Authorization Checklist
- Legal - Accident Procedures

Actions

- Motor Fleet Vehicle Rates
- Request a Vehicle
- Cancel Vehicle Reservation
- Review Reservations

Reports

- Reservations History
- Review Motor Fleet Log History

A red arrow points to the 'Reservations History' option in the Reports section.

3.) In the Reports section, select Reservations History.

# Reservation History



The screenshot shows a web application interface for LNCCHARLOT. At the top, there is a navigation bar with links for 'My Home', 'My Favorites', 'My Jobs', 'My Profile', 'Sign Out', and 'Help'. Below this is a header for 'Reservation History' with a search icon. The main content is a table with the following columns: Driver, Status, Destination, Number of Personnel, Requested Vehicle Type, In/Out State, Planned Pickup, Planned Pickup Time, Planned Return, Planned Return Time, Work Request Code, Actual Mileage, Mileage Rate, Total Cost, and Requestor Remarks. The table contains ten rows of reservation data.

Driver	Status	Destination	Number of Personnel	Requested Vehicle Type	In/Out State	Planned Pickup	Planned Pickup Time	Planned Return	Planned Return Time	Work Request Code	Actual Mileage	Mileage Rate	Total Cost	Requestor Remarks
DINELLO, RAYMOND (rdinello)	Closed	Home	1	Car	In	3/26/2008		3/27/2008					2008032500	1000
DINELLO, RAYMOND (rdinello)	Closed	GA	1	Car	Out	3/28/2008	03:35 PM	3/28/2008	03:35 PM				2008032110	100
DINELLO, RAYMOND (rdinello)	Rejected	test	1	Car	In	3/28/2008		3/28/2008					2008032768	
DINELLO, RAYMOND (rdinello)	Closed	vegas	2	Car	In	4/1/2008	08:00 AM	4/4/2008	05:00 PM				2008033371	2000
DINELLO, RAYMOND (rdinello)	Closed	california	1	Car	In	4/1/2008		4/10/2008					2008033367	8325
DINELLO, RAYMOND (rdinello)	Rejected	cali	1	Car	In	4/1/2008		4/11/2008					2008033366	
DINELLO, RAYMOND (rdinello)	Rejected	Florida	1	Car	Out	4/7/2008	08:00 AM	4/11/2008	05:00 PM				2008033856	
DINELLO, RAYMOND (rdinello)	Closed	Florida	1	Car	Out	4/7/2008	08:00 AM	4/11/2008	05:00 PM				2008033799	60
DINELLO, RAYMOND (rdinello)	Cancelled	ME	0	Car	In	4/29/2008	04:46 PM	4/29/2008	04:47 PM				2008035687	

4.) You will then see a list of all the Motor Fleet reservations that are in-active (Completed, Closed, Cancelled, or Rejected).

# Sorting Vehicle Reservations

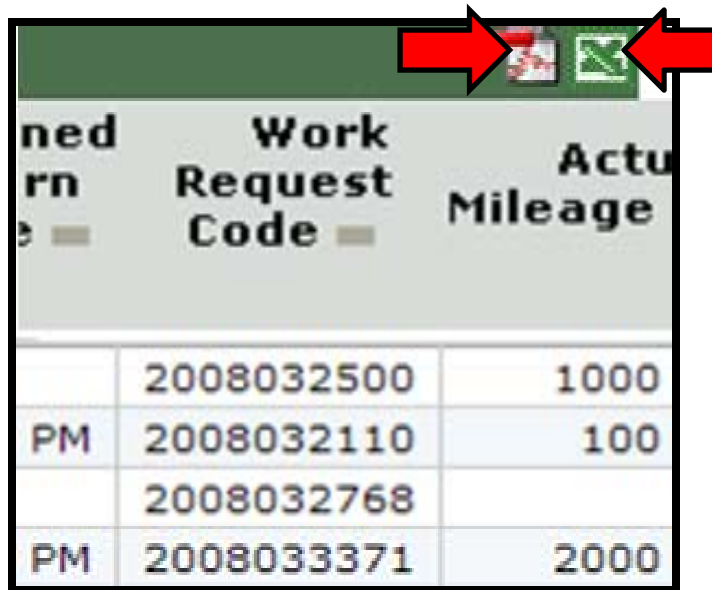
Planned Pickup Time	Planned Return	Planned Return Time	Work Request Code	Actual Mileage	Mileage Rate	Total Cost	Requestor Remarks	
	3/27/2008		2008032500	1000	0.31		test	
03:35 PM	3/28/2008	03:35 PM	2008032110	100	0.25	25.00	test	
	3/28/2008		2008032768				test	

Driver	Status	Destination	Number of Personnel	Requested Vehicle Type	In/Out State	Planned Pickup	Planned Pickup Time	Planned Return
<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>			
DINELLO, RAYMOND (rdinello)	Closed	Home	1	Car	In	3/26/2008		3/27/2008
DINELLO, RAYMOND (rdinello)	Closed	GA	1	Car	Out	3/28/2008	03:35 PM	3/28/2008
DINELLO, RAYMOND (rdinello)	Rejected	test	1	Car	In	3/28/2008		3/28/2008

5.) If you need to sort the list or locate a specific vehicle request, scroll to the right and select the small plus sign. This will open the mini console allowing you to locate your reservation.



# Exporting Reservations History



ned rn	Work Request Code	Actu Mileage
	2008032500	1000
PM	2008032110	100
	2008032768	
PM	2008033371	2000

6.) You can also export the entire list to Microsoft Excel or a PDF by click on the Excel or PDF buttons. A window will pop up displaying the entire list and you are welcome to print it out or save it for your records.

7.) Once you are finished reviewing the reservations, you can log out of Archibus by closing your web browser.

# Points of Contact

- This completes the user guide on Reserving and Canceling a Vehicle, and Reviewing Vehicle Reservations and History.
- If you have any questions about Archibus or the features presented in this guide, please contact:
  - Pamela Duff, Facilities Information Systems  
Ext. 74009  
[pduff@uncc.edu](mailto:pduff@uncc.edu)
- If you have a question regarding Motor Fleet, please contact:
  - Kathy Fisher, Motor Fleet  
Ext. 72639  
[mkfisher@uncc.edu](mailto:mkfisher@uncc.edu)