

AUTOMOTIVE LIAISONS MEETING

March 13th, 2013

Customer Service Department

- Bill Confair
 - ✉ biconfair@pa.gov
 - ☎ 717-783-2325
- Randy Howard
 - ✉ ranhoward@pa.gov
 - ☎ 717-346-5967

Increased Driver Accountability

- Beginning March 1st, 2013 when a state-owned vehicle is involved in an accident, both the operator of the vehicle AND the Automotive Liaison will be required to sign the STD-541 Accident Report.
- It is the Automotive Liaison's responsibility to report all accidents to the operator's immediate supervisor.

Increased Driver Accountability

- We will still be enforcing the requirement for all STD-541's to be turned in within one business day after the accident.
- Please have both signatures on the STD-541 when you turn in the form.
- If it is sent in without both signatures, it will be returned to the Automotive Liaison. Please sign and return it to the CSD immediately.

Accident Reporting – STD-541

Please write the mileage on the top of the STD-541. A new fill-able PDF version of the STD-541, with a section for mileage, will be posted on the DGS website shortly.

Please make sure you are using the most recent version of the STD-541. The most recent version of the STD-541 is posted on the DGS website.

If you are using a version that asks for the driver's social security number, please discontinue using that version.

SHOW most recent STD-541.

COMMONWEALTH OF PENNSYLVANIA STD-541

AUTOMOBILE ACCIDENT OR LOSS NOTICE FOR COMMONWEALTH OWNED VEHICLES

*THIS NOTICE SHALL BE RETURNED BY THE OPERATOR OF THE COMMONWEALTH OWNED VEHICLE AND SUBMITTED TO THE BUREAU OF ROAD AND MAIL MANAGEMENT DEPARTMENT OF GENERAL SERVICES. DO NOT USE VEHICLE NO. THIS NOTICE IS FOR ACCIDENT, DAMAGE TO OR LOSS IN ACCORDANCE WITH MANAGEMENT ORDER NO. 8-22, PRESERVATION AND ABANDON OF FORMS STD-541.

DATE OF ACCIDENT		DAY OF WEEK		TIME OF DAY		SHIFT STARTING TIME AM PM	
COMMONWEALTH VEHICLE INFORMATION		YEAR	MAKE	MODEL	SERIAL NO.	EQUIPMENT NO.	REGISTRATION NO.
IF VEHICLE IS A FLEET VEHICLE DEPARTED FROM THE COMMONWEALTH GARAGE, COMPLETE THIS LINE →		ISSUED REQUESTING	DATE DISPATCHED		THIS SPACE FOR INSURANCE USE ONLY FAULT OF VEHICLE NO.		
ASSIGNED TO (GIVE NAME OF DEPARTMENT, BOARD OR COMMISSION AND BUREAU)				SOCIAL SECURITY NUMBER			
VEHICLE NO. 1 (COMMONWEALTH OWNED)				VEHICLE NO. 2			
OPERATOR'S NAME		YEAR'S SERVICE		OPERATOR'S NAME			
ADDRESS (GIVE STREET & NUMBER)		CITY		STATE		AGE	
BUREAU		JOB TITLE		JOB CLASS CODE		OPERATOR'S LICENSE NO. AND STATE	
DEFENSIVE DRIVER'S NO.		OPERATOR'S LICENSE NO.		WORK PHONE NO.		OWNER'S NAME	
PURPOSE FOR USING THE CAR AT THE TIME OF THE ACCIDENT		EMPLOYEE ACTIVITY CODE		ADDRESS (GIVE STREET NO. & NAME, CITY, STATE)			
DESCRIBE DAMAGE TO COMMONWEALTH VEHICLE OR FACILITIES		INSURANCE CARRIER		VEHICLE LICENSE NO. & STATE		YEAR & MAKE OF VEHICLE	
DESCRIBE DAMAGE TO VEHICLE NO. 2		POLICY NO.		ESTIMATED COST OF REPAIR \$			
ESTIMATED COST OF REPAIR \$		NAME & ADDRESS OF INSURANCE CO. AND POLICY NO.		NAME & ADDRESS OF INSURANCE AGENT, IF ANY			
ACCIDENT OCCURRED AT: TOWNSHIP OR BOROUGH		SR.		OWNER OF PROPERTY			
CITY OR TOWN		SEGMENT		ADDRESS			
STREET NAME		OFFSET		CITY DAMAGE			
COUNTY		RURAL AREA		ESTIMATE COST OF DAMAGE \$			
OF (CITY OR TOWN) INDICATE MILEAGE TO CITY LIMITS		NORTH		DAMAGE TO PROPERTY OTHER THAN			
		SOUTH		NAME			
		EAST		ADDRESS			
		WEST		TELEPHONE NUMBER			
				AGE			
				TOWN CAR			
				OTHER CAR			
				PEDESTRIAN			
				EXTENT OF INJURIES			

COMMONWEALTH OF PENNSYLVANIA STD-541

IF YOU WERE IN THE VEHICLE TO POLICE? <input type="checkbox"/> YES <input type="checkbox"/> NO	IF YOU WERE IN THE VEHICLE TO POLICE? <input type="checkbox"/> YES <input type="checkbox"/> NO	IF YOU WERE IN THE VEHICLE TO POLICE? <input type="checkbox"/> YES <input type="checkbox"/> NO	IF YOU WERE IN THE VEHICLE TO POLICE? <input type="checkbox"/> YES <input type="checkbox"/> NO
IF YES TO WHOM?	IF YES, WHERE?	OPERATION WAS <input type="checkbox"/> MOVING <input type="checkbox"/> STATIONARY	
INCIDENT #	NAME	ADDRESS	TELEPHONE NUMBER
PLEASE REVIEW FORM TO INSURE THAT ALL NECESSARY DATA HAS BEEN PROVIDED			
SIGNATURE OF VEHICLE OPERATOR OR		DATE	SIGNATURE OF AUTOMOTIVE OFFICER
WEATHER	LIGHT	TYPE ROAD	CONDITION
<input type="checkbox"/> CLEAR <input type="checkbox"/> CLOUDY <input type="checkbox"/> RAINING <input type="checkbox"/> SNOWING <input type="checkbox"/> FOG <input type="checkbox"/> OTHER (SPECIFY)	<input type="checkbox"/> DAYLIGHT <input type="checkbox"/> DIM/DARKNESS <input type="checkbox"/> DARKNESS <input type="checkbox"/> ARTIFICIAL LIGHT <input type="checkbox"/> OTHER (SPECIFY)	<input type="checkbox"/> CONCRETE <input type="checkbox"/> BRICK <input type="checkbox"/> ASPHALT <input type="checkbox"/> GRAVEL <input type="checkbox"/> DIRT <input type="checkbox"/> OTHER (SPECIFY)	<input type="checkbox"/> DRY <input type="checkbox"/> WET <input type="checkbox"/> MUDDY <input type="checkbox"/> SNOWY <input type="checkbox"/> Icy
			<input type="checkbox"/> STRAIGHT ROAD <input type="checkbox"/> SHARP CURVE <input type="checkbox"/> OTHER CURVE
			VEHICLE <input type="checkbox"/> NO DEFECTS <input type="checkbox"/> DEFECTIVE BRAKES <input type="checkbox"/> DEFECTIVE STEERING <input type="checkbox"/> DEFECTIVE LIGHTS <input type="checkbox"/> OTHER DEFECTS
DRIVER ACTION		PART OF VEHICLE STRUCK	CONDITION OF PEDESTRIAN
<input type="checkbox"/> GOING STRAIGHT AHEAD <input type="checkbox"/> MAKING RIGHT TURN <input type="checkbox"/> MAKING LEFT TURN <input type="checkbox"/> SLOWING DOWN—STOPPING <input type="checkbox"/> RETRACING—PARKING <input type="checkbox"/> OTHER BACKING <input type="checkbox"/> STOPPED IN TRAFFIC LANE PARKING	<input type="checkbox"/> FRONT <input type="checkbox"/> RIGHT FRONT <input type="checkbox"/> LEFT FRONT <input type="checkbox"/> RIGHT FRONT <input type="checkbox"/> RIGHT SIDE <input type="checkbox"/> LEFT SIDE <input type="checkbox"/> REAR <input type="checkbox"/> RIGHT REAR <input type="checkbox"/> LEFT REAR	<input type="checkbox"/> APPARENTLY NORMAL <input type="checkbox"/> OBVIOUSLY DRUNK <input type="checkbox"/> SLAD BEEN DRUNKING <input type="checkbox"/> PHYSICAL DEFECTS <input type="checkbox"/> OTHER (SPECIFY)	<input type="checkbox"/> HEAD ON COLLISION <input type="checkbox"/> REAR END COLLISION <input type="checkbox"/> SIDE SWIPE COLLISION <input type="checkbox"/> AT ANGLE COLLISION
			<input type="checkbox"/> SLAN OFF CURVE <input type="checkbox"/> SLAN OFF STRAIGHT ROAD <input type="checkbox"/> OVERTURNED IN ROADWAY
IF STATE EQUIPPED WITH SEAT BELTS, WERE THEY FASTENED?	ESTIMATED SPEED OF VEHICLES	PEDESTRIAN ACTION (OR INDICATES INTERSECTION)	TRAFFIC CONTROL
<input type="checkbox"/> YES <input type="checkbox"/> NO	VEHICLE NO. 1 VEHICLE NO. 2 VEHICLE NO. 3	<input type="checkbox"/> CROSSING AT X WITH SIGNAL <input type="checkbox"/> CROSSING AT X AGAINST SIGNAL <input type="checkbox"/> CROSSING AT X NO SIGNAL <input type="checkbox"/> CROSSING AT X DIAGONALLY <input type="checkbox"/> CROSSING NOT AT X COMING FROM BEHIND PARKED CAR <input type="checkbox"/> CROSSING HOT AT X NOT COMING FROM BEHIND PARKED CAR <input type="checkbox"/> GETTING ON OR OFF VEHICLE	<input type="checkbox"/> R & B CROSSING GATE <input type="checkbox"/> R & B AUTOMATIC SIGNAL OFFICER OR WATCHMAN <input type="checkbox"/> STOP—GO LIGHT <input type="checkbox"/> STOP SIGN OR SIGNAL <input type="checkbox"/> WARNING SIGN OR SIGNAL <input type="checkbox"/> OTHER <input type="checkbox"/> NO CONTROL PRESENT
GIVE A BRIEF AND CLEAR DESCRIPTION OF ACCIDENT			
<p>Instructions:</p> <ol style="list-style-type: none"> Your vehicle should be designated as #1. Other vehicle(s) should be designated as #2, etc. Use solid line to show path of vehicle before accident. Use dotted line after accident. Number each vehicle & show direction of travel. Show stop sign by "S". Show pedestrian by "P". Show railroad by "RR". Show yield sign by "Y". Show curve by "C". Show traffic signal by "E". 			
Remarks, Statements, Third Vehicle — Attach additional sheets for drawings, other statements, etc. as is necessary.			

Customer Service Department

➤ Accident Reporting STD 541

- The STD-541 Accident report must be received on the following business day.
- The BVM Director & the Automotive Liaison's supervisor will be notified when an STD-541 is not received on the following business day after an accident occurs.
- The operator of the vehicle should call the CSD on the next business day after the vehicle is damaged, to open a work order. The operator of the vehicle should also notify his or her Automotive Liaison.

Customer Service Department

- Accident Reporting Continued
 - If the vehicle is drivable, we should receive 3 estimates from approved vendors within 10 business days of the accident.
 - If the vehicle is not drivable, only 1 estimate is necessary.

Operations Decides on Repairs

- Any damage to a state-owned vehicle needs to be reported and a STD-541 should be sent in the next business day.
- If you have any damage to the vehicle and are not sure if it should be repaired, take a picture and send it to me or Randy Tomlinson to determine the next step.
- If you can not take a picture, get 3 estimates to repair the damage and send the estimates to the CSD with a STD-541.

Glass Replace / Repair – STD-541

A STD-541 is needed when any glass is replaced.

A STD-541 is not needed when glass is repaired.

For example - a chipped windshield.

Questions and Answers

- If a state employee notices damage to a pool car for example, what should he or she do?
 - Fill out a STD-541 and list the driver's name as "Reported by Fred Johnson"
 - What if Fred doesn't report the damage?
 - The next driver who drives that vehicle will report the damage and we are going to then question Fred Johnson, the last driver, about the damage. Best to report any Damage before you drive away.

BRIM

- What happens if a driver turns in a STD-541 but can't track down the Automotive Liaison to get his or her signature.
- BRIM wants us to send in the STD-541 on the next business day. Turn in the form with only the driver's signature and we will forward a copy to BRIM and also to the Automotive Liaison for their signature.
 - Driver's should never determine if work should be completed on any vehicle and they should never authorize repairs. Only a CSR or Operations can authorize the repairs to begin.

AUTOMOTIVE LIAISONS MEETING

M5 System Administration

March 13, 2013

M5 System Administration

- William Ward
 - ✉ wilward@pa.gov
 - ✉ 717-346-3344
- March Mileage Information:
 - ✉ Deadline – 10 am on Friday, March 15

M5 System Administration

- Monthly Mileage Entry
 - Remind those who enter the monthly mileage:
 - Only enter Business Days Used, Final Meter Reading from the STD-554, and Total Commute/Personal Miles
 - M5 will compute the Total Business Miles
 - If there is an error, send a screen shot error and a scanned copy of the STD-554 to M5 Administrators

M5 System Administration

- Monthly Mileage Entry
 - When reporting M5 Errors to the M5 Administrator eMail account, please attach a correctly completed STD-554 (09/2011), Monthly Automotive Activity Report with the email
 - M5 Administrators will not make any changes or updates on your behalf if the STD-554 is not properly completed

M5 System Administration

- Monthly Mileage Entry
 - According to Management Manual 615.3, Commonwealth Fleet Procedures Manual:
 - All operators of Commonwealth Fleet passenger and non-passenger vehicles must document daily vehicle usage appropriately through the completion of Form STD-554, Monthly Automotive Activity Report
 - Manual 615.3, Section One, Paragraph 5

M5 System Administration

- Reminders for Operators
 - When an operator fills out the STD-554, please follow the instructions included with the electronic and hard copies of the form.
 - Forms are available on the DGS Website, under Vehicle Management, then Forms.

M5 System Administration

Questions?

M5 System Administration

- Fleet Audit

- BVM will be conducting an audit to ensure the unit information held within M5 accurately reflects the Commonwealth Fleet inventory being used by the agencies
- All Passenger/Non-Passenger/Law Enforcement units will be audited

M5 System Administration

- Fleet Audit

- Information to review

- Vehicle information

- Operator information

- Financial information

- Three Phases

- Half of the Passenger Fleet: 03/14 - 03/15

- Other Half of the Passenger Fleet: 03/21 – 22

- Non Passenger Fleet: 03/28 – 03/29

M5 System Administration

- Fleet Audit

- Each agencies Auto Liaison, Liaison's Supervisor, Agencies Fiscal Liaison and the Agencies Deputy Secretary of Administration will receive the audit spreadsheet

M5 System Administration

- Fleet Audit

- Updates or Changes can be made directly inside the spreadsheet
- This will remove the need for completing new forms and submitting them to BVM for processing

M5 System Administration

- Fleet Audit

- Take the time to go line by line and validate each unit and the information provided

- This is your opportunity to make sure proper operators, parking locations, cost centers, WEX accounts are correct

M5 System Administration

- Fleet Audit

- Designated agency heads, as defined in Management Directive 615.16, Commonwealth Fleet Policy, are eligible for a permanent assignment of a passenger vehicle and/or the use of a Voyager Fuel Car.

- These operators are required to complete and submit the updated Form STD-928 (07/12)

M5 System Administration

- Fleet Audit
 - Return the M5 System Administrator team will be making the updates

M5 System Administration

- Future Projects

- M5 Upgrade

- Planning for a Production Upgrade on April 22nd
 - Be prepared for either upgrade notes or formal training the week of April 15th

- 6 Month Utilization Update

AUTOMOTIVE LIAISONS MEETING

March 18, 2013

Operations and Maintenance

- Randy Tomlinson

✉ rtomlinson@pa.gov

✉ 717-783-3088

Operations and Maintenance

STD 556, coding is required

COMMONWEALTH OF PENNSYLVANIA
STD 556

USED CAR DISPOSITION REPORT

DATE _____

TO: DIRECTOR, BUREAU OF VEHICLE MANAGEMENT
DEPARTMENT OF GENERAL SERVICES
2221 FORSTER STREET
HARRISBURG, PENNSYLVANIA 17125

FROM: _____ DEPARTMENT REFERENCE NUMBER _____

The vehicle identified below is no longer required by this Department and is released for appropriate disposition. The following actions pertinent to the release of the vehicle have been completed. All keys have been tagged and identified by Department and Equipment Number. Credit Cards, Registration Card and License have been returned to the Disposition Division. Vehicle has been cleaned. Personal and superfluous Commonwealth property have been removed.

If this vehicle is reported on the Commonwealth Fixed Asset Accounting System, STD-243, Fixed Asset Accounting System Transaction, must be completed and included with this report.

EQUIPMENT NO. _____ YEAR MANUFACTURED _____ MAKE _____
MODEL _____ BODY STYLE _____ NO. CYL. _____ CU. IN. _____ COLOR _____
MANUFACTURER'S NO. _____ TYPE OF TRANSMISSION _____
TITLE NO. _____ MILEAGE _____

PROCEEDS TO BE CREDITED TO: REVENUE CODE (MUST BE COMPLETED)

FUND	SECT	APP	VS	L	ORG	CODE NAME	OBJ

AGENCY REVIEW OF VEHICLE
(Actual Driver Should Assist in Review)

LAST DATE IN USE (FIVE MONTHS & YEARS) _____

EXTERIOR CONDITION (BODY, CHASSIS, TIRE, WINDOW, ETC.)	EXPLAIN DEFECTS (EXPLAIN)
<input type="checkbox"/> GOOD <input type="checkbox"/> FAIR <input type="checkbox"/> POOR	
INTERIOR CONDITION (SEATBELT, ACCESSORIES, INSTRUMENTATION, ETC.)	EXPLAIN DEFECTS (EXPLAIN)
<input type="checkbox"/> GOOD <input type="checkbox"/> FAIR <input type="checkbox"/> POOR	
ENGINE/DRIVE PERFORMANCE (GENERAL, TORQUE, THRUST, RESPONSE)	EXPLAIN DEFECTS (EXPLAIN)
<input type="checkbox"/> GOOD <input type="checkbox"/> FAIR <input type="checkbox"/> POOR	
OVERALL CONDITION OF VEHICLE	REMARKS
<input type="checkbox"/> GOOD <input type="checkbox"/> FAIR <input type="checkbox"/> POOR	

SALE SITE LOCATION (Address): _____

CONTACT PERSON AT SALE SITE: _____

THE ABOVE INFORMATION IS PROVIDED TO ASSIST BIDDERS IN THEIR EVALUATION OF THE VEHICLE, HOWEVER, IT MAY NOT INCLUDE ALL DEFECTS. CONDITION SHOULD BE DETERMINED BY THE BIDDER'S INVESTIGATION AND INSPECTION. THERE IS NO GUARANTEE BY THE BUREAU OF VEHICLE MANAGEMENT REGARDING CONDITION OF THE VEHICLE. REFUNDS OR ADJUSTMENTS WILL NOT BE MADE UNDER ANY CIRCUMSTANCES.

ALL VEHICLES SOLD "AS IS." ALL WARRANTIES, EXPRESS AND IMPLIED ARE EXCLUDED.

DATE _____ SIGNATURE _____ DEPARTMENTAL AUTOMOTIVE OFFICER

(FOR BUREAU OF VEHICLE MANAGEMENT USE ONLY)

RECEIVED: CREDIT CARD _____ REGISTRATION CARD _____ LICENSE PLATE _____

DATE: _____

Operations and Maintenance

Condition assessment also required

COMMONWEALTH OF PENNSYLVANIA
870-0000

USED CAR DISPOSITION REPORT

DATE _____

TO: DIRECTOR, BUREAU OF VEHICLE MANAGEMENT
DEPARTMENT OF GENERAL SERVICES
2221 FORSTER STREET
HARRISBURG, PENNSYLVANIA 17125

FROM: _____ DEPARTMENT REFERENCE NUMBER _____

The vehicle identified below is no longer required by this Department and is released for appropriate disposition. The following actions pertinent to the release of the vehicle have been completed. All keys have been tagged and identified by Department and Equipment Number. Credit Cards, Registration Card and License have been returned to the Disposition Division. Vehicle has been cleaned. Personal and superfluous Commonwealth property have been removed.

If this vehicle is reported on the Commonwealth Fixed Asset Accounting System, STD-243, Fixed Asset Accounting System Transaction, must be completed and included with this report.

EQUIPMENT NO. _____ YEAR MANUFACTURED _____ MAKE _____
MODEL _____ BODY STYLE _____ NO. CYL. _____ CU. IN. _____ COLOR _____
MANUFACTURER'S NO. _____ TYPE OF TRANSMISSION _____
TITLE NO. _____ MILEAGE _____
PROCEEDS TO BE CREDITED TO: REVENUE CODE (MUST BE COMPLETED) _____

FUND	SECT	APP	VS	L	ORG	CODE FUND	ORG

AGENCY REVIEW OF VEHICLE
(Actual Driver Should Assist in Review)

LAST DATE IN USE (FIVE MONTHS & YEARS) _____

EXTERIOR CONDITION (BODY, TIRE, WINDOW, ETC.)	KNOWN DEFECTS (EXPLAIN)
<input type="checkbox"/> GOOD <input type="checkbox"/> FAIR <input type="checkbox"/> POOR	
<input type="checkbox"/> GOOD <input type="checkbox"/> FAIR <input type="checkbox"/> POOR	
<input type="checkbox"/> GOOD <input type="checkbox"/> FAIR <input type="checkbox"/> POOR	
<input type="checkbox"/> GOOD <input type="checkbox"/> FAIR <input type="checkbox"/> POOR	

SALE SITE LOCATION (Address): _____

CONTACT PERSON AT SALE SITE: _____

THE ABOVE INFORMATION IS PROVIDED TO ASSIST BIDDERS IN THEIR EVALUATION OF THE VEHICLE, HOWEVER, IT MAY NOT INCLUDE ALL DEFECTS. CONDITION SHOULD BE DETERMINED BY THE BIDDER'S INVESTIGATION AND INSPECTION. THERE IS NO GUARANTEE BY THE BUREAU OF VEHICLE MANAGEMENT REGARDING CONDITION OF THE VEHICLE. REFUNDS OR ADJUSTMENTS WILL NOT BE MADE UNDER ANY CIRCUMSTANCES.

ALL VEHICLES SOLD "AS IS." ALL WARRANTIES, EXPRESS AND IMPLIED ARE EXCLUDED.

DATE _____ SIGNATURE _____
DEPARTMENTAL AUTOMOTIVE OFFICER

(FOR BUREAU OF VEHICLE MANAGEMENT USE ONLY)

RECEIVED: CREDIT CARD _____ REGISTRATION CARD _____ LICENSE PLATE _____
DATE: _____



Operations and Maintenance

Temp Fleet coding review

	Rental Agreement Number	Start Date	Return Date	Total Rental Charges	First Name	Last Name	Business Area	Cost Center	SAP Fund	Internal Order	WBS (Work Breakdown Structure)	Business Area	Cost Center	SAP Fund	Internal Order	WBS (Work Breakdown Structure)
1																
2	4H86PK	2/6/2013	2/6/2013	\$12.16	KIM	BATHGATE	79	7967001000	1058912000			79	7967001000	1058912000	S40121070200	
3	4H86PK	2/6/2013	2/6/2013	\$25.84	KIM	BATHGATE						79	7967001000	7036512000	S40121070200	
4	4FDZJT	1/28/2013	2/25/2013	\$680.00	GARY	BOOSE	79	7910591120	1059112000			79	7944540000	1059112000		
5	4LMYV0	2/22/2013	2/25/2013	\$34.00	LAURIE	CASTAGNA	79	7955401000	2030612000							
6	4KYSCN	2/19/2013	2/21/2013	\$41.00	JOHN	DESANTIS	79	7955401000	2030612000							
7	4JXSDJ	2/14/2013	2/15/2013	\$68.00	CAROL	HESS	79	7977001000	2030612000			79	7955401000	2030612000		
8	4FCTJ0	1/28/2013	2/1/2013	\$170.00	JERRY	HOUSTON	79	7944550000	1059112000							
9	4GPVN2	2/4/2013	2/7/2013	\$136.00	JERRY	HOUSTON	79	7944550000	1059112000							
10	4J140D	2/11/2013	2/14/2013	\$136.00	JERRY	HOUSTON	79	7944550000	1059112000							
11																
12																

Operations and Maintenance

Quick Topics

- Great job picking up new units!
- Need to work on finish turning in underutilization units ASAP
- DGS rollback

Wright Express

Custom Reports

Billing Codes

1. Log into WEX
2. Open Reports screen
3. Open my custom reports
4. Open create a new report

The screenshot shows the 'Reports' section of the Sunoco Universal Fleet Online application. The browser window title is 'Reports - Windows Internet Explorer'. The address bar shows the URL: https://www.sunocouniversalfleetonline.com/online/gotoFlow.do?_flowExecutionKey=_cE285238B-CFFC-65B6-85. The page features a navigation menu with 'Home', 'Fleet Manager', 'Financials', 'Reports', 'Resource Tools', and 'Administration'. A search bar is located below the menu. The main content area is divided into 'Shortcuts' and 'Reports'. The 'Shortcuts' sidebar lists various report categories and their sub-options. The 'Reports' main area contains six report categories, each with an icon and a brief description.

Shortcuts

- Reports
 - Reports Home
 - Ad Hoc Reports
 - Transaction Details
 - Transaction Summary
 - Exceptions
 - My Flexible Exceptions
 - Add Exception Report
 - View Exception Reports
 - Standard Reports
 - View Standard Reports
 - Manage Delivery Preferences
 - My Custom Reports
 - Create New Report
 - View My Reports
 - View My Templates
 - Real-Time Alerts
 - View Real-Time Alerts

Reports

- Ad Hoc Reports**
Pre-formatted transaction reports with query options.
[Transaction Details](#) | [Transaction Summary](#) | [Exceptions](#)
- My Flexible Exceptions**
Identify exception parameters and report timing, and view reports.
[Add Exception Report](#) | [View Exception Reports](#)
- Standard Reports**
Search and view pre-formatted reports by account and cycle.
[View Standard Reports](#) | [Manage Delivery Preferences](#)
- My Custom Reports**
Create and run custom reports using design templates.
[Create New Report](#) | [View My Reports](#) | [View My Templates](#)
- Real-Time Alerts**
Access your Real-Time Alert Notifications
[View Real-Time Alerts](#)

In card profile report click on create report

The screenshot shows a Windows Internet Explorer browser window titled "Create New Report - Windows Internet Explorer". The address bar displays the URL: https://www.sunocouniversalfleetonline.com/online/gotoFlow.do?_flowExecutionKey=_cA07BA18A-3683-8973-6A. The browser's menu bar includes File, Edit, View, Favorites, Tools, and Help. The page content is organized into a grid of report templates, each with a description and a "Create Report" button.

Left Navigation Panel:

- My Flexible Exceptions
 - Add Exception Report
 - View Exception Reports
- Standard Reports
 - View Standard Reports
 - Manage Delivery Preferences
- My Custom Reports
 - Create New Report
 - View My Reports
 - View My Templates
- Real-Time Alerts
 - View Real-Time Alerts

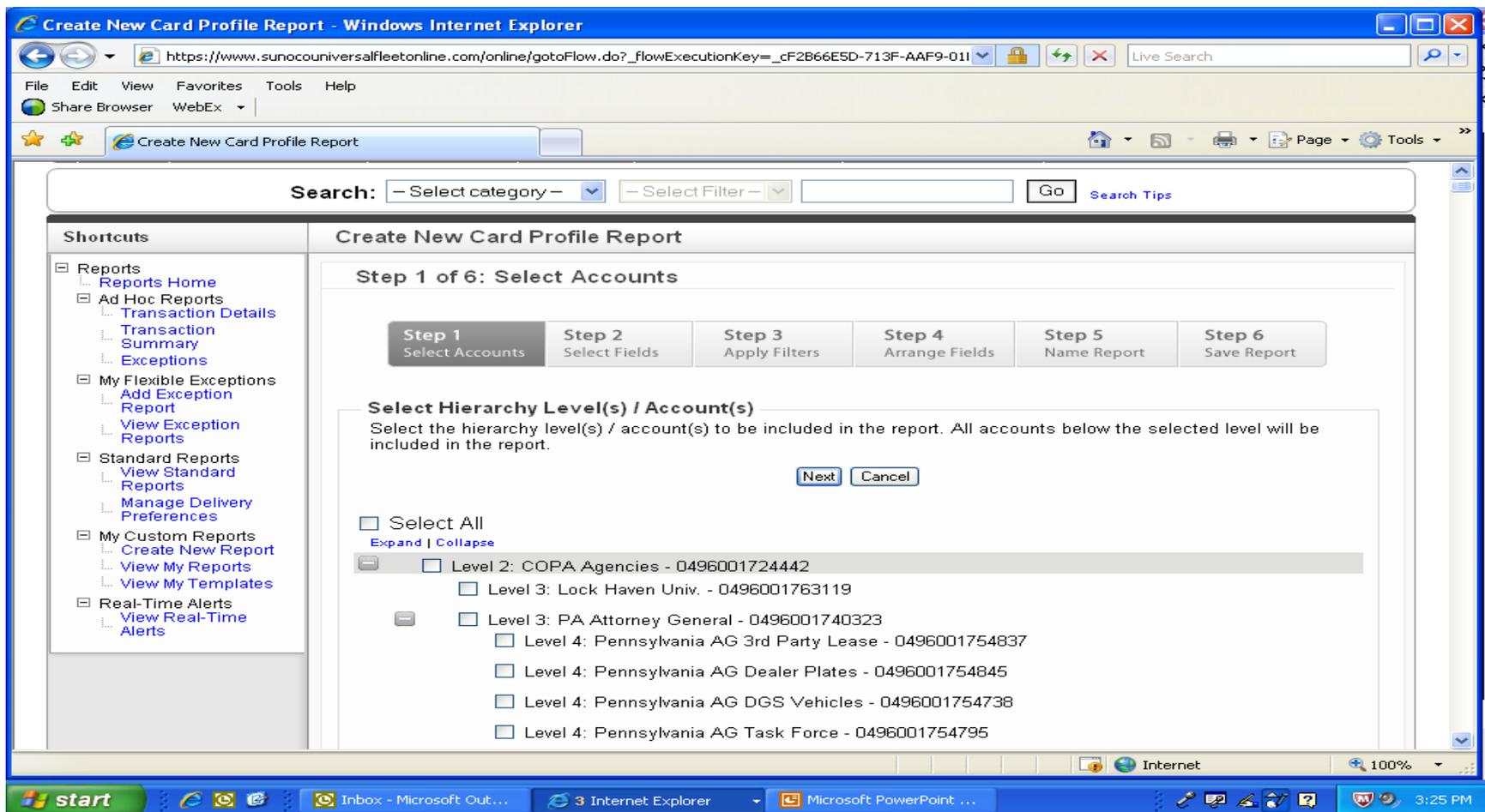
Report Templates:

- Account Profile Report:** Choose this template to obtain a custom report that itemizes the accounts within your hierarchy and provides details regarding those accounts including Contact Name, Shipping Information, Total Cards, Total Driver Prompts, Card type, Accounts, Org Units, and Total Vehicle Prompts. [View Details](#)
- Authorization Activity Report:** Use this template to build a custom report that provides you with a direct view of authorization activity. Access to detailed authorization data helps you make informed decisions and perform analysis to help manage and enforce driver purchasing policies. [View Details](#)
- Card Profile Report:** Use this template to build a custom report with a broad view of cards across multiple accounts or focused on a single account. Reports based on this template allow you to monitor and review card data based on a comprehensive view of card attributes or just a few specific card details. [View Details](#)
- Driver Profile Report:** Use this template to build a custom report with a broad view of drivers across multiple accounts or focused on a single account. Reports based on this template allow you to monitor and review driver data based on comprehensive information, including account assignment, name, status, and date of last transaction. [View Details](#)
- Transaction Management Report:** Select this template to generate a transaction-level report that allows you to analyze usage at certain merchants or within specified...
- Vehicle Profile Report:** Use this template to build a custom report with a broad view of vehicles and assets across multiple accounts or focused on a...

The Windows taskbar at the bottom shows the Start button, taskbar icons for Internet Explorer, Microsoft PowerPoint, and the system clock displaying 3:23 PM.

There are six steps and the system will walk you thru step by step.
Step 1: Select the hierarchy level. To view all of your cards select the highest level. If you want to view only the cards in one account, you can run each account separately.

Click Next



Select which fields you wish to include in the report. Deselect any that aren't needed by unlocking the box. Required fields will be grayed out. I have selected fields that I feel you need to verify coding.

Click Next

Available Fields

The following fields can be included in the report. To remove fields, deselect below. Fields marked as Required cannot be removed from the report.

Back Next Cancel

<input checked="" type="checkbox"/>	Available Fields	Required	Allows Filtering
<input checked="" type="checkbox"/>	Account Name	✓	
<input checked="" type="checkbox"/>	Account Number	✓	
<input checked="" type="checkbox"/>	SAP Account		✓
<input checked="" type="checkbox"/>	Card Number	✓	✓
<input checked="" type="checkbox"/>	Last Updated By		✓
<input checked="" type="checkbox"/>	Department		✓
<input checked="" type="checkbox"/>	Last Transaction Date		
<input checked="" type="checkbox"/>	Set Up Date		
<input checked="" type="checkbox"/>	Status Indicator		✓
<input checked="" type="checkbox"/>	Status Date		

Fields to Select

- Suggested Fields
- Name
- Account number
- In service date
- Custom vehicle asset ID
- Business area
- SAP Fund
- SAP Cost Center
- SAP Internal Order
- Vehicle Department
- VIN
- Make and Model

Step 3 allows you to apply filters to the criteria you selected. For this report I suggest you leave the filters alone.
Click Next

The screenshot shows a web browser window titled "Create New Card Profile Report - Windows Internet Explorer". The address bar shows the URL: https://www.sunocouniversalfleetonline.com/online/gotoFlow.do?_flowExecutionKey=_c5BCA886D-6299-7437-7F.... The page title is "Create New Card Profile Report".

The main content area is titled "Step 3 of 6: Apply Filters". It features a progress bar with six steps: Step 1 (Select Accounts), Step 2 (Select Fields), Step 3 (Apply Filters), Step 4 (Arrange Fields), Step 5 (Name Report), and Step 6 (Save Report). Step 3 is currently selected.

Below the progress bar, there is a section titled "Available Filters" with the text: "To limit your results, you may apply filters." Below this text are three buttons: "Back", "Next", and "Cancel".

The "Available Filters" section contains a table with three columns: "Filters", "Conditions", and "Values".

Filters	Conditions	Values
SAP Account	--Select--	No Yes
Card Number	--Select--	
Last Updated By	--Select--	
Department	--Select--	
Status Indicator	--Select--	Active Locked Suspended
Renew Card	--Select--	Yes No

The Windows taskbar at the bottom shows the Start button, several application icons, and the system tray with the time 10:13 AM and 100% zoom level.

Step 4

Select the order of which you would like the fields displayed based on what you chose in

Step 2

Click Next

The screenshot shows a web browser window titled "Create New Card Profile Report - Windows Internet Explorer". The address bar shows the URL: https://www.sunocouniversalfleetonline.com/online/gotoFlow.do?_flowExecutionKey=_c5BCA886D-6299-7437-7F. The browser menu includes File, Edit, View, Favorites, Tools, and Help. The page title is "Create New Card Profile Report".

The main content area is titled "Step 4 of 6: Arrange Fields". It features a progress bar with six steps: Step 1 (Select Accounts), Step 2 (Select Fields), Step 3 (Apply Filters), Step 4 (Arrange Fields - currently active), Step 5 (Name Report), and Step 6 (Save Report). Below the progress bar, the "Arrange Fields" section contains the following text: "You may choose to re-arrange the fields listed below, so that they will appear on your report in the order in which you wish to see them. Click Update to save your changes. Click Reset to return to the default field arrangement." Below this text are "Back", "Next", and "Cancel" buttons.

A table with two columns, "List Order" and "Available Fields", is displayed. The table contains the following data:

List Order	Available Fields	Update	Reset
1	Account Name		
2	Account Number		
3	SAP Account		
4	Card Number		
5	Last Updated By		
6	Department		
7	Last Transaction Date		
8	Set Up Date		
9	Status Indicator		

The Windows taskbar at the bottom shows the Start button, several open applications (Inbox - Microsoft..., My Documents, Microsoft PowerPo..., Create New Card...), and the system tray with the time 10:29 AM and 100% zoom level.

Step 5: Name your report

Step 6: Save the report

- Save and Run now will save the report to your templates, so you can go back and run again at any time. It will also prompt you for a date range and export the results to excel.
- Save will save to your templates but will not display the results.
- Schedule will ask you to select the frequency to run the report.
- Select the format-CSV or Excel
- Select the Delivery Option- Online, E-mail or FTP
- Once the report is saved to “My Templates” you can always go back and modify or run it at any time.

Screen shot of Report Name

Step 5

The screenshot shows a web browser window titled "Create New Card Profile Report - Windows Internet Explorer". The address bar shows the URL: https://www.sunocouniversalfleetonline.com/online/gotoFlow.do?_flowExecutionKey=_c5BCA886D-6299-7437-7F. The browser's menu bar includes File, Edit, View, Favorites, Tools, and Help. The page header features the Sunoco logo and "Universal Fleet Online" text, along with a user greeting "Welcome JFire1" and links for "My Preferences", "Help", "Contact Us", and "Logout". A navigation menu contains "Home", "Fleet Manager", "Financials", "Reports", "Resource Tools", and "Administration". A search bar is present with dropdowns for "Select category" and "Select Filter", and a "Go" button. A "Shortcuts" sidebar on the left lists various report-related options. The main content area is titled "Create New Card Profile Report" and "Step 5 of 6: Name Report". It features a progress bar with six steps: Step 1 (Select Accounts), Step 2 (Select Fields), Step 3 (Apply Filters), Step 4 (Arrange Fields), Step 5 (Name Report), and Step 6 (Save Report). Below the progress bar is a "Report Information" section with a text box and instructions: "Name and describe this report. We recommend naming your report in a way that you may easily identify it later. The optional description can be used as a reminder of the report contents and usage. Fields marked with an asterisk (*) are required." Two input fields are provided: "* Report Name:" (with a "Max of 40 characters" limit) and "Description:" (with a "Max of 50 characters" limit). At the bottom of the form are "Back", "Next", and "Cancel" buttons. The Windows taskbar at the bottom shows the Start button, several open applications (Inbox, My Documents, Microsoft PowerPoint, Create New Card Profile Report), and the system clock showing 10:44 AM.

Step 6

This screen is where you will make your final selections for the report.

The screenshot shows a web browser window titled "Create New Card Profile Report - Windows Internet Explorer". The address bar shows the URL: https://www.sunocouniversalfleetonline.com/online/gotoFlow.do?_flowExecutionKey=_c5BCA886D-6299-7437-7F. The browser's menu bar includes File, Edit, View, Favorites, Tools, and Help. The page header features the SUNOCO logo and "Universal Fleet Online" text, along with a user greeting "Welcome JFiore1" and links for "My Preferences", "Help", "Contact Us", and "Logout". A navigation menu contains "Home", "Fleet Manager", "Financials", "Reports", "Resource Tools", and "Administration". A search bar is present with "Search: - Select category -" and "Go" buttons. The main content area is titled "Create New Card Profile Report" and "Step 6 of 6: Save Report". A progress bar shows six steps: Step 1 (Select Accounts), Step 2 (Select Fields), Step 3 (Apply Filters), Step 4 (Arrange Fields), Step 5 (Name Report), and Step 6 (Save Report), with Step 6 being the active step. Below the progress bar is a "Report Summary" section with the following text: "This is your opportunity to review your report parameters and go back to make changes. You may **Save and Run Now**, or may choose to **Save** your template for future use. If this is a report you wish to receive on a regular basis, you may opt to **Schedule** it to run automatically on a timetable of your choice. You can access your saved templates via **View My Templates** under **My Custom Reports**." The summary also displays: "Report Name: **Coding Report**", "Description:", and "Selected Hierarchy Level(s)/Account(s): **Level 4: Pennsylvania AG... - 0496001754837**". At the bottom of the summary section is a "Fields and Filters" section. At the very bottom of the page are buttons for "Back", "Save and Run Now", "Save", "Schedule", and "Cancel". The browser's status bar shows "Done" and "Internet". The Windows taskbar at the bottom includes the Start button and several open applications: "Inbox - Microsoft ...", "My Documents", "Microsoft PowerPo...", and "Create New Card ...". The system clock shows "10:50 AM".

STD-556

- This form is being revised to include:
 - 1. SAP Fund
 - 2. SAP Cost Center
 - 3. G/L

The Std 556 already has a place for the Revenue code and the ICS coding.

We will be asking you to verify the coding we receive on the STD-556 prior to releasing the auction results to the Comptroller. We are experiencing consistent errors from several agencies.

This is your money. Ask your Finance Officer for the correct coding prior to filling out the 556.