Fleet Data Clean-Up Job Aid

The purpose of this job aid is to provide instructions on how to review and correct Fleet data in MAGIC.

Listed below are the topics that are covered in the job aid. Please note that for security purposes, some of the data in the screen shot examples has been covered.

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Required Fleet Data in MAGIC

The Office of Purchasing, Travel, and Fleet Management (OPTFM) has identified the following data elements to be required in MAGIC in order to make statewide Fleet Management business decisions:

1. Accurate Asset and Equipment record statuses
2. Fuel, Maintenance, and Repair data of vehicles
3. Accurate vehicle mileage readings
4. Assignment Type of vehicles and Driver Assignments
5. County field on the asset record

Accurate Asset and Equipment Record Statuses

In MAGIC each vehicle has an asset record (maintained to track financial information such as depreciation and current value) and an equipment record (maintained to track maintenance history and usage costs information). When the asset record is saved in the system, a corresponding equipment record shell is created. The shell must be manually completed for each new vehicle by the agency's Fleet Coordinator.

The number of active vehicle records should be consistent in the Asset and Fleet Management modules. The only instance where an agency would have a larger amount of active vehicle asset records than equipment records would be when split funding is used to purchase a vehicle. In this case, the agency may have additional sub assets that do not require equipment records. Follow the steps below to review and update asset and equipment record statuses.

1.) Generate a list of active vehicle assets in MAGIC
   a. Enter transaction **ZFAM_ASSETS_BY_EMPL** in ECC to access the Active Assets by Employee Assigned report.
   b. Click the multiple selection button on the Asset Class line and enter the asset classes for vehicles: EQ030025, EQ030026, XEQ03025, and XEQ03026
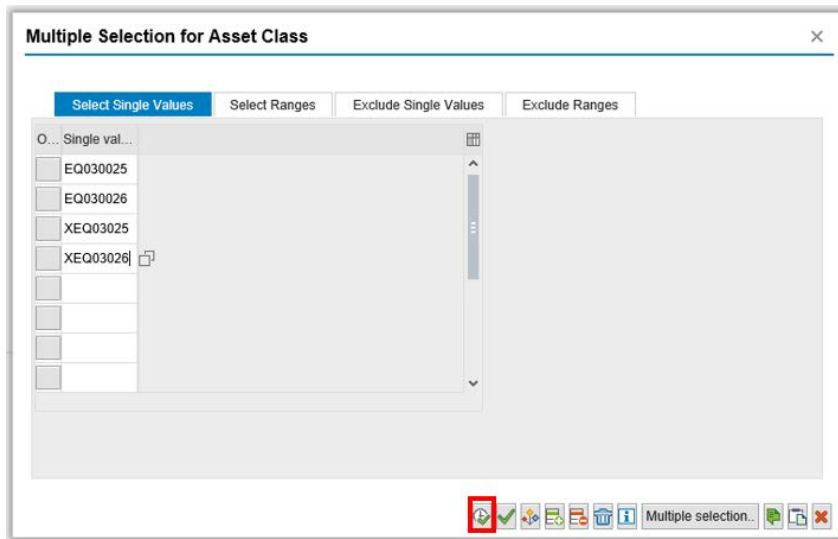
c. Click **Execute** to run the report.
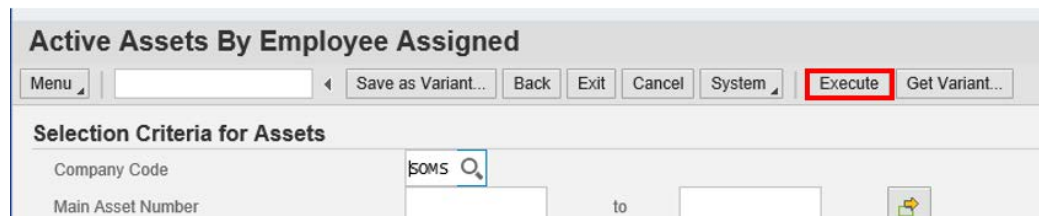
2.) The report output will display a list of active vehicle asset records for the user's authorized agency. Review the list to make sure it is accurate.
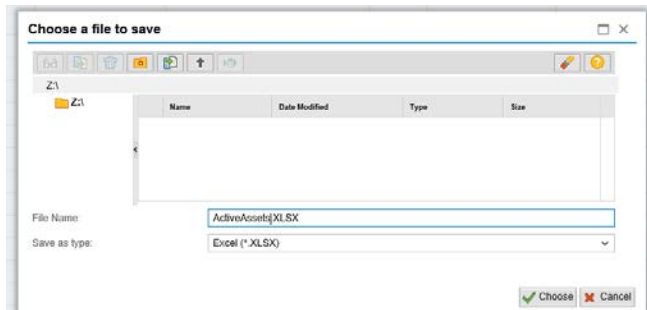
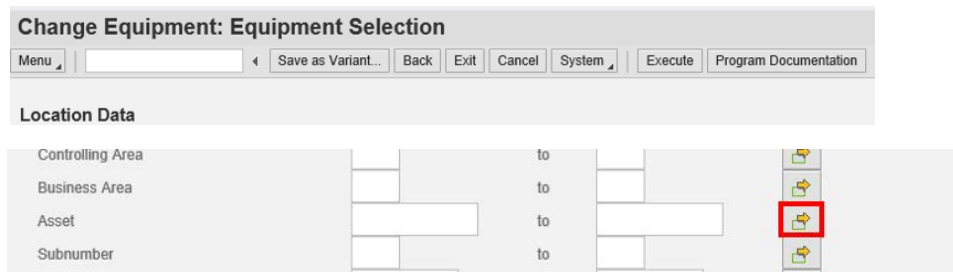Note: For security purposes, specific data on the report is not shown in this job aid.

3.) Export the report into a spreadsheet using the following menu path: Menu > List > Export > Spreadsheet.

4.) Highlight the data in the **Main Asset Number** column and copy it to your clipboard.


5.) Enter transaction **IE05** in ECC to display a list of equipment records.
   a. Click the multiple selection button on the Asset line. (Scroll down the page to the Location Data section to find the Asset field.)

b. Paste the values form the previous report by clicking on the **upload from clipboard** button and click the **copy** button. (You must have copied the asset column from the Active Assets report as directed in step 4 to be able to paste the values in the Fleet report.)
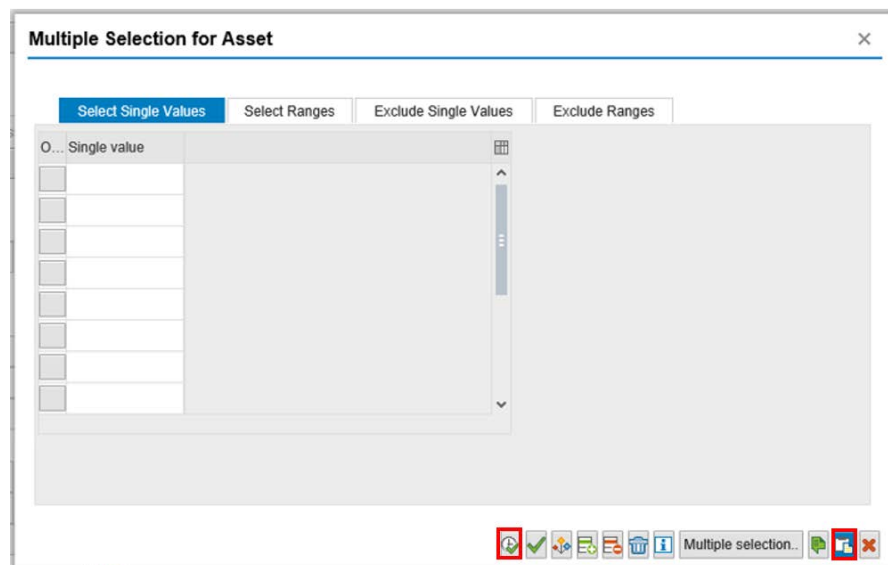
c. Execute the report.

6.) The report output will display all of the equipment records that are linked to the agency's current active vehicle asset list.

Review the report and if any records show blank fields, these shells have not been completed by the Fleet Coordinator. Complete the equipment record setup by following the steps in the New or Transfer Vehicle job aid for new vehicle set up.
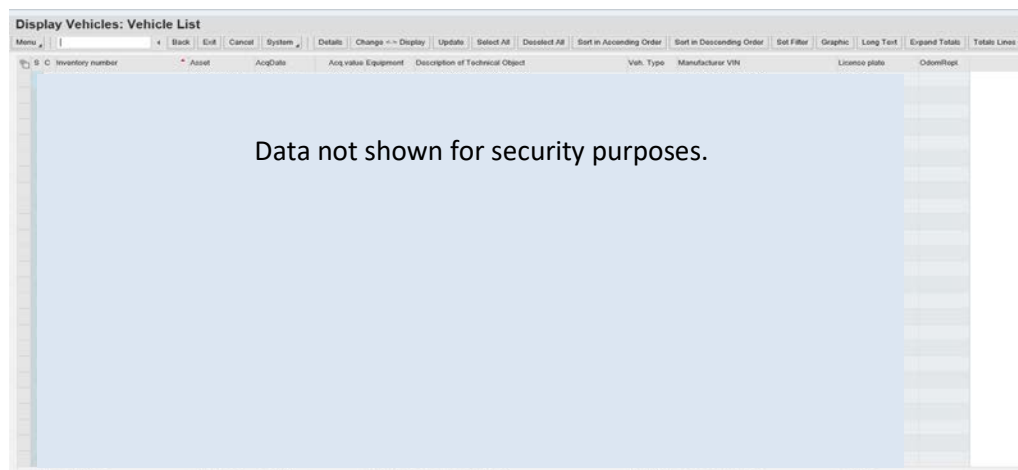
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7.) Additionally, a custom report is available to view the status discrepancies between vehicle asset records and equipment records.
   a. Enter transaction **ZFAM_VEHICLE_EQ_STAT** in ECC to review vehicle and equipment record status report.
   b. Execute the report.

8.) The report displays the asset records and corresponding equipment records. The mismatch records are highlighted in Green.
   a. If the asset record is active and the equipment record is inactive, reactivate the equipment record using transaction **IE02**. Do not complete this step for sub assets.
   b. If the asset record is inactive and the equipment record is active, deactivate the equipment record using transaction **IE02**.

   Use the New Vehicle Setup job aid for steps to deactivate an equipment record.

Inventory#	Asset#	Asset Class	Bus Area	Acquisn Date	Deactvn Date	Asset Status	Equipment #	Description	Equ Status	Mismatch	Planner	AuthorGroup
Data not shown for security purposes.	EQ030025	1130		08/01/2000	07/01/2014	INAC		1997 SIERRA CREW PICKUP	AVLB	X		
	EQ030025	1130		09/01/2000		AVLB		2001 CHEVROLET SILVERADO	AVLB		130	
	EQ030025	1130		01/31/2006	05/30/2017	INAC		2003 FORD ECONOLINE WAGON	AVLB	X		1130

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Fuel, Maintenance, and Repair Data of Vehicles

Fuel, maintenance, and repair data must be entered for all vehicles in MAGIC. If the initial equipment record / measuring points setup is complete and the correct inventory number has been submitted to FuelMan, all fuel, maintenance, and repairs purchased with a FuelMan card will automatically post in MAGIC. There are multiple reports that can be used to review the postings for this data.

1. **Measurement Documents IK17 (display) and IK18 (change)**
   This list edit report will display the fuel entries (gallons), fuel cost (price), and odometer postings for a vehicle. Enter the equipment number to view the postings for a vehicle.

2. **Display PM Orders IW39**
   This report list maintenance and repair entries that have been made to a vehicle. Enter the equipment number in the search criteria and select Historical Orders at the top of the Selection Screen.

3. **Mississippi State Auditors Report – Vehicle**
   This Analytics report provides a list of active vehicles (based on the status of the equipment record) for an agency with summary cost information (fuel costs, maintenance costs, and repair costs) and odometer readings. Since this is an Analytics report, data is updated in a nightly batch process. From the Analytics tab in the MAGIC portal use the path Public Folders > State of Mississippi > LO – Logistics > Plant/Fleet Maintenance > Mississippi State Auditors Report – Fleet to run the report.

4. **FuelMan error report ZPMFMI_FUELMANLOGGER**
   This report displays the last 3 months' errors from the FuelMan file load. Review this report weekly to determine reasons for the FuelMan errors.

FUELMAN: Logger

UUID	Object ID	Line No.	Equipment	Pl.plant	Inventory no.	Transaction Code	Serv Type	Serv Date	Vendor Name	Field	Msg.typ	Error Text
		3,789		1130		ODO. READING(IK11)	FUEL	11/29/2016			E	Odometer reading outside dail
		184		1130		ODO. READING(IK11)	FUEL	12/09/2016	Data not shown		E	Odometer reading outside 30 (
		50		1130		ODO. READING(IK11)	FUEL	11/16/2016	for security		E	Odometer reading outside dail
		47		1130		ODO. READING(IK11)	FUEL	11/18/2016	purposes.		E	Odometer reading outside dail
		99		1130		ODO. READING(IK11)	FUEL	12/27/2016			E	Odometer reading outside 30 (
		243		1130		ODO. READING(IK11)	FUEL	11/03/2016			E	Odometer reading outside dail
		4,536		1130		ODO. READING(IK11)	FUEL	02/18/2017			E	Odometer reading outside 30 (
		4,539		1130		ODO. READING(IK11)	TBA	02/15/2017			E	Odometer reading outside dail
		52		1130		ODO. READING(IK11)	FUEL	11/18/2016			E	Odometer reading outside 30 (
		2,726		1130		ODO. READING(IK11)	FUEL	12/30/2016			E	Odometer reading outside 30 (

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Accurate Vehicle Mileage Readings

To identify vehicles with bad mileage readings, follow the steps below.

1.) Enter transaction **IE36** in ECC.
2.) Execute the report.

3.) If the default layout does not contain the mileage readings for the vehicles, add the field to the report. Click Menu > Settings > Layouts > Current to modify the fields displayed in the report.

4.) Add the **Primary Counter Reading** field to the Displayed Columns List. Click **Save** (if you would like to keep this change as a default) or the Green Check.
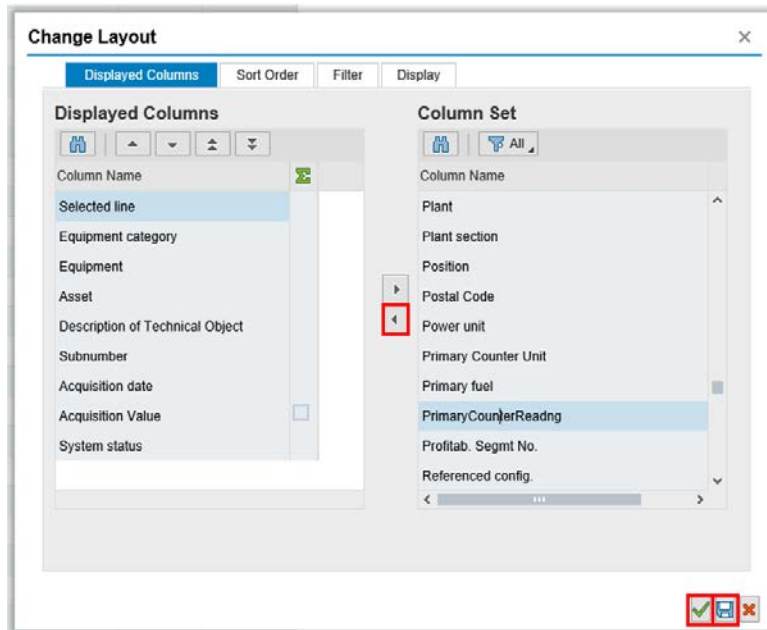
5.) Review the odometers in the report. All odometers that are blank or over 1,000,000 miles should be corrected.

    a. If a vehicle has no reading, the either the initial odometer reading was never posted or the Calculation method was not entered on the equipment record. Follow the New Vehicle Setup job aid for instructions to post an initial odometer reading.

    b. If a vehicle has an odometer over 1,000,000 miles, it is likely an erroneous posting has been made. The section below outlines the steps to review mileage postings and reverse incorrect measurement documents.

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To fix erroneous mileage readings, follow the steps below:

1. Enter transaction **IK18** in ECC to review Measurement Documents for a specific vehicle.
2. Complete the fields for the selection criteria and execute the report:
   a. Equipment
   b. Choose "**with or without**" Reversal indicator to show all measurement document postings
   c. Change the "No. of MeasDocs by MeasPoint" to "**999999**" in order to display more than 50 postings.
   d. Execute the report

3. Right click on **PM_MILES** in the "MeasPosition" field and select **Set Filter**. This will filter the report to display only the odometer postings.
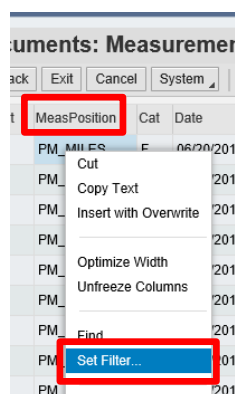
4. Click the **Green Check** to accept the filter.

5. Review the postings in the **CntrRdg** (Counter Reading) field to determine the erroneous measurement reading postings.

6. Double-click the line to open the counter reading, and follow the menu path to reverse the posting: Menu < Measurement Document < Functions < Reversal Indicator < Set.

Click **Save**. If you do not save the reversal, it will not change the posting.
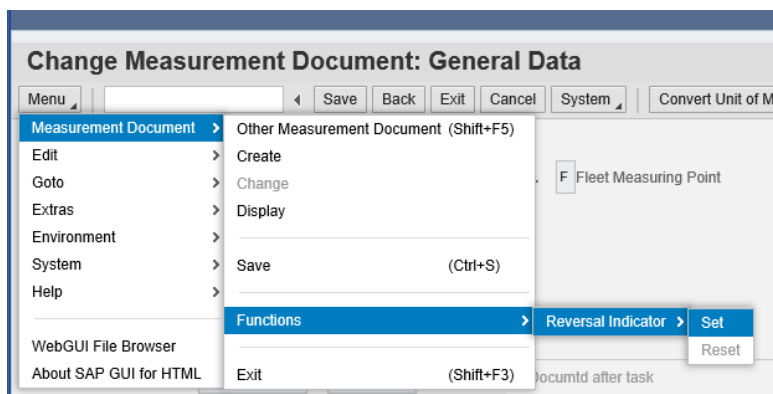
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7. Click the **Update** button to display the changes made as a result of the reversals. Also, you will notice "X" in the reversal indicator column for the entries reversed.

8. If the erroneous posting is the first posting for the vehicle, a new initial odometer posting is required. Post the new entry 1 mile before the next correct posting and 1 day before the current initial posting. Instructions to create an initial odometer posting are included in the New Vehicle Setup job aid.

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Assignment Type of Vehicles and Driver Assignments

All vehicles with the assignment types, Commute and Law Enforcement, require an active Driver Assignment unless the vehicle is Undercover. Pool vehicles (non-commute) do not require a driver assignment. Driver assignments are valid for one year and should be renewed after an assignment has expired. Follow the steps below to determine if commute and law enforcement vehicle have an active driver assignment.

1. Enter transaction **IE36** and **Execute** report.

2. Filter the report to exclude any records that have INAC in the status field. Highlight the **SysStatus** field and click **Set Filter**.

   This can also be done by creating a variant on the selection criteria page. The variant can be saved as a default and eliminate having to complete the filter steps of this task.

3. Click the **Multiple Selection** icon to set exclusions in the Filter.

4. Select the **Exclude Single Values** tab. Using the lookup function select all values that include INAC (inactive). Then, click the **Copy** button.

5. Review the records with Functional Location that end with FC (Commute) or FL (Law Enforcement). Vehicles with FN (Non-Commute) are pool vehicles and should not have a driver assignment. *If you do not have the Functional Location field in the report, add it following the steps above to add the Primary Counter Reading field.

6. Double click on the line for Commute and Law Enforcement vehicles to display the details of the equipment record.
7. On the Information tab, review the driver assignment details to determine if the assignment is active.

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Review the County Field on the Asset Record

The County field on the asset record is now a required field for vehicle asset classes. Follow the steps below to ensure the County field is populated.

1. Generate a list of active vehicle assets in MAGIC
   a. Enter transaction **ZFAM_ASSETS_BY_EMPL** in ECC to access the Active Assets by Employee Assigned report.
   b. Click the multiple selection button on the Asset Class line and enter the asset classes for vehicles: EQ030025, EQ030026, XEQ03025, and XEQ03026
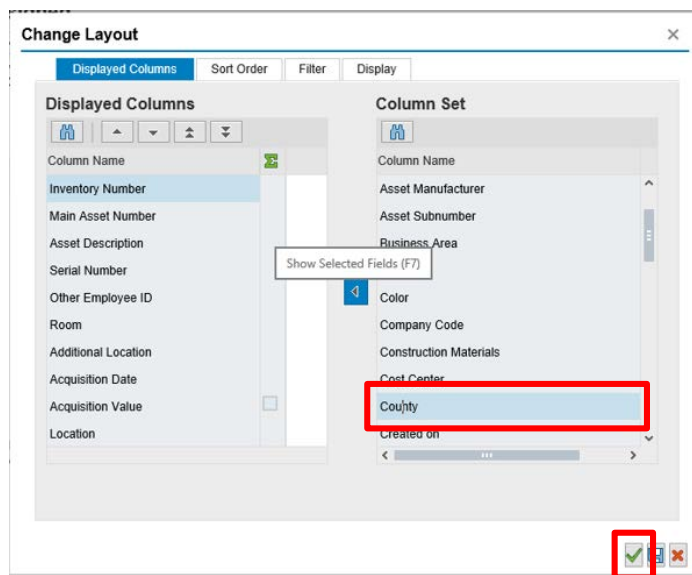

   c. **Execute** the report.

2. Change the report Layout to include the County field by using the path Menu > Settings > Layout > Change.
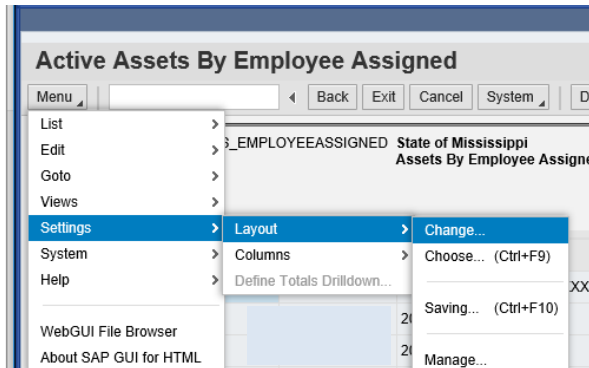
3. Add the **County** field to the Display Columns list and click the **Green** check.

4. Review the County column in the report. If a record does not have a county populated, it must be corrected using transaction **AS02**.