

Lesson 6: Fleet Card Setup

Lesson Description

In Lesson 6 LFPCs and AFHCs will learn how to create and maintain Fleet credit card accounts in PCMS. This lesson assumes participants have the ability to navigate PCMS and an understanding of the purpose of creating and maintaining Fleet accounts.

Training Objectives

At the conclusion of this lesson, PCMS LFPC's and AFHC's will be able to:

1. Create, maintain, and query Fleet card accounts in FAMS.
2. Delete, and replace Fleet cards.

Methodology

This lesson will be delivered using a combination of lecture and presentation, and discussion. Group discussion and trainee interaction will be used to stimulate recall of policy information and establish a knowledge base on which to build in subsequent lessons.

References

None

Enclosures

- (1) Fleet PCMS User's Guide, USDA\PMT, June 2006;
- (2) Fleet PCMS Quickguide, USDA\PMT, October 2000;

I. Fleet Card Setup Overview

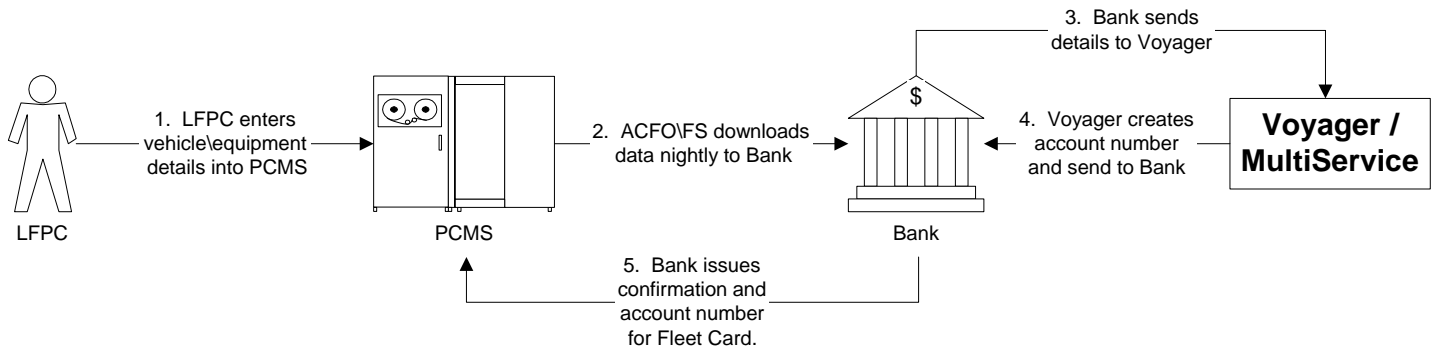


Please turn off your monitor and give your attention to the instructor.

a. Workflow

The Fleet Card Setup window is used to setup Fleet card accounts for vehicles and equipment, establish specific vehicle\equipment profile information, and replace or delete Fleet cards.

The LFPC enters Fleet card details in PCMS. This information is then downloaded to the Bank by ACFS\FO on a nightly basis. After receiving the Fleet card details, the bank sends PCMS an acknowledgment in response to each account setup or maintenance request. The Fleet card account number is also issued at this point.



Notes:

b. Fleet Card Window

To access the Fleet Card window, click **Fleet Card** on the main menu and select **Fleet Card Setup**.



Enter details in the fields to create or modify Fleet card accounts.

The screenshot shows the 'Fleet Card Setup' window with the following fields and sections:

- User Information:** LFPC User Id, First Name, M. I., Last Name.
- Agency Information:** LFPC Agency, LFPC Region, LFPC Unit, LFPC Sub Unit, Delete Card, Replace Card.
- Action and Identification:** Last Action Requested (A), Tag/Equipment Number, Card Expire.
- Program Details:** Program Code (448687), Dept (12), Agency, Region, Unit, Sub Unit (0000).
- Card Information Section:**
 - Type of Card (V), Type of Equip (V), Type of Plastic (S).
 - Lost/Stolen Counter (0), Replaced Counter (0), Emboss in Spanish (N).
 - Comments field.
- Bank and Vehicle Information:** Sent to, Returned, Voyager/Aviation #, Bank Number, LFPC, LFPC Change, LFPC Change, Vehicle Pin #.
- Profile Accounting Table:**

Agency Station	Accounting Code	Distribution Percent
		Total Percent

Notes:

c. LFPC Details

The following is a brief description of each LFPC field in the Fleet Card Setup screen.

Fields:

Fieldname	Description
LFPC User ID (Required field)	The PCMS user identification number of the LFPC assigned to the fleet card to either be added to or retrieved from PCMS. (Query field.)
First Name (Required field)	The LFPC’s first name.
M. I. (Required field)	The LFPC’s middle initial.
Last Name (Required field)	The LFPC’s last name.
LFPC Agency LFPC Region LFPC Unit LFPC Sub Unit	The LFPC’s organizational structure\hierarchy. (Non-entry fields)
Delete Card	Use to delete a fleet card record at the bank. Note: Cards cannot be deleted if Last Action Requested = A.
Replace Card	Use to replace a fleet card. Check this box to replace a card that has been damaged. Note: Cards cannot be deleted if Last Action Requested = A.



All fields lock when you select either **Delete Card** or **Replace Card**

d. Hierarchy Details

Last Action Requested	<input type="text" value="A"/>	Tag/Equipment Number	<input type="text"/>	Card Expire	<input type="text"/>
Program Code	<input type="text" value="448687"/>	Dept	<input type="text" value="12"/>	Agency	<input type="text"/>
		Region	<input type="text"/>	Unit	<input type="text"/>
				Sub Unit	<input type="text" value="00000"/>

Fields:

Fieldname	Description
Last Action Requested (Non-entry field)	When a card record is completed and saved, the Last Action Requested field is programmatically assigned one of the following values: A - add, M - modify, D - delete, L - LFPC Information Changed, R -replacement, T - transfer of equipment, and U - update.
Tag/Equipment Number (Query field.)	Equipment identification number.
Card Expire (Non-entry field)	Card expiration date. Populated by the system when the record is returned from the bank.
Program Code (Non-entry field)	The program code for each equipment record is hard coded into the system.
Dept (Required field)	Contains the default value of 12 for USDA. This value can be changed.
Agency (Required field)	The agency where the fleet card will reside.
Region (Required field)	The region where the fleet card will reside.
Unit (Required field)	The unit where the fleet card will reside.
Sub Unit (Required field)	The sub-unit where the fleet card will reside. Default is 00000.

e. Setup \ Maintenance Information

The setup\maintenance information is contained in the center of the Fleet Card Maintenance window, beginning with Card Information. It is organized into four tabs: **Card Info**, **Equip Info**, **Limit Info** and **Driver Info**. Click on the tab header to navigate between sections.

- **CARD INFO TAB**

Fields:

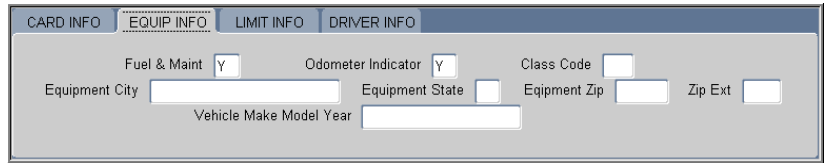
Fieldname	Description
Type of Card (Required Field)	Valid values are: N = Neither D = Driver V = Vehicle
Type of Equip (Required Field)	Valid values are: A = Aircraft E = Equipment V = Vehicle B = Boat P = Pool TYPE OF CARD vs. TYPE OF EQUIPMENT <ul style="list-style-type: none"> ▪ If the TYPE OF CARD = D, the TYPE OF EQUIPMENT can only be V. ▪ If the TYPE OF CARD = V, the TYPE OF EQUIPMENT can only be V. ▪ If the TYPE OF CARD = N, the TYPE OF EQUIPMENT can be A, B, E, or P. TYPE OF EQUIPMENT vs. TAG/EQUIPMENT NUMBER <ul style="list-style-type: none"> ▪ If the TYPE OF EQUIPMENT = A, the TAG/EQUIPMENT NUMBER must begin with N. ▪ If the TYPE OF EQUIPMENT = P, the TAG/EQUIPMENT NUMBER must begin with P.
Type of Plastic	Valid values are: Q = Quasi-Generic – non-government/government card S = Standard – government card
Lost/Stolen Counter (Non-entry field)	Displays the number of times the card has been reported as lost or stolen.
Replaced Counter (Non-entry field)	Displays the number of times the card has been replaced.
Emboss in Spanish (Required Field)	Valid values are: Y = Yes or N = No Changing this field will generate a new Voyager account number and a new fleet card.



Fieldname	Description
Comments (Not Required)	User field for comments.

Notes:

- EQUIP INFO TAB

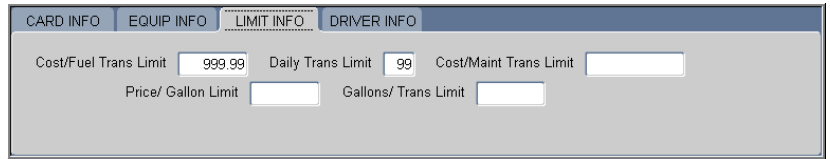


Fields:

Fieldname	Description
Fuel & Maint (Required Field)	Valid values are: Y = Yes or N = No
Odometer Indicator (Required Field)	Valid values are: Y = Yes or N = No If the TYPE OF CARD is "V," the ODOMETER INDICATOR is "Y" and no changes will be allowed. If the TYPE OF CARD is "N" or "D," the ODOMETER INDICATOR is "N."
Class Code (Optional Field)	Values for this field are yet to be determined. Field describes equipment size (e.g., medium sedan; light, medium, or heavy truck).
Equipment City	The city where the equipment will reside. (Required if TYPE OF CARD is Vehicle or Neither .)
Equipment State	The state where the equipment will reside. (Required if TYPE OF CARD is Vehicle or Neither .)
Equipment Zip	The zip code where the equipment will reside. (Required if TYPE OF CARD is Vehicle or Neither .)
Zip Ext (Not required.)	The zip extension of where the equipment will reside. (Not required.)
Vehicle/Make/Model/Year (Not required.)	The vehicle's make, model, and year. Valid only when TYPE OF CARD is Vehicle or Driver .

Notes:

- LIMIT INFO TAB



Fields:

Fieldname	Description
Cost/Fuel Trans Limit (Required Field)	Fuel costs per transaction limit. Field defaults to all 9's (999.99) unless individual agencies reset. Individual agencies determine their own limits.
Daily Trans Limit (Required Field)	Transaction limit per day. Field defaults to all 9's (99) unless individual agencies reset. Individual agencies determine their own limits.
Cost/Maint Trans Limit (Required Field)	Maintenance cost per transaction limit. Field defaults to all 9's (999999.99) unless individual agencies reset. Individual agencies determine their own limits.
Price/Gallon Limit (Required Field)	Price per gallon limit. Field defaults to all 9's (999.99) unless individual agencies reset. Individual agencies determine their own limits.
Gallons/Trans Limit (Required Field)	Gallons per transaction limit. Field defaults to all 9's (9999.99) unless individual agencies reset. Individual agencies determine their own limits.

Notes:

- DRIVER INFO TAB**
 The Driver Information is only required when the **Type of Card is Driver**.



This window is not used by USDA at this time.

Fields:

Fieldname	Description
Driver Number	USDA's driver identification (license) number.
First Name (Required Field)	Driver's first name.
Last Name (Required Field)	Driver's last name.
M.I. (Required Field)	Driver's middle initial.
Address Ln1 (Required Field)	Driver's Department/Agency.
Address Ln2	Driver's address information.
City (Required Field)	The driver's office city.
State (Required Field)	The driver's office state.
Zip (Required Field)	The driver's office zip.
Office Phone (Required Field)	Driver's office phone number.

Notes:

f. Bank \ LFPC Information

Sent to Bank LFPC Action Code	<input type="text"/>	Returned Fm Bank LFPC Change Sent On	<input type="text"/>	Voyager/Aviation # LFPC Change Returned On	<input type="text"/>	Bank Number Vehicle Pin #	<input type="text"/>
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Fields:

Fieldname	Description
Note: These fields are informational only; they cannot be updated from this window.	
Sent to Bank	Date that a new or updated fleet record was sent to the bank.
Returned Fm Bank	Date the fleet record was returned from the bank.
Voyager/Aviation #	The Fleet Card Voyager/Aviation account number.
Bank Number	The Fleet Card's bank ghost account number.
LFPC Action Code	Valid values are: Blank = no updates have been made or L = LFPC information changed.
LFPC Change Sent on	Date that the updated LFPC information was sent to the bank.
LFPC Change Returned on	Date the updated LFPC information was returned from the bank.
Vehicle Pin #	The vehicle pin number. (Must be used when making purchases).

Notes:

g. Profile Accounting

Profile Accounting			
Agency	Station	Accounting Code	Distribution Percent
11	0103	901601	100
Total Percent			100

One or more lines of profile accounting information for the vehicle can be entered here.

Fieldname	Description
Agency (Required Field)	The agency code that the purchase is to be charged against.
Station	The accounting station code that the purchase is to be charged against.
Accounting Code (Required Field)	The accounting code against which this portion of the transaction is charged.*
Distribution Percent (Required Field)	The percentage of this account to be applied to the transaction amount.
Total Percent (Non-entry Field)	The total percentage to be applied to the transaction amount. This field must equal 100 percent.



Update Profile accounting details through the Profile Accounting window.

Notes:



II. Query Fleet Card Records





Please turn off your monitor and give your attention to the instructor.

Agency Station	Accounting Code	Distribution Percent
03	4011230105	100
Total Percent		100

a. Query ALL records

- Click  on the command bar to clear all fields
- Click  again to generate a list of all records associated to the LFPC currently logged on
- Use the vertical scroll bar to navigate between vehicle\equipment records or click **Record** on the command menu and select **Next** or **Previous**.

b. Query specific records

- Click  on the command bar once
- Enter the search value in a query field and click 
- The query results display
- The “%” wildcard can be used
- Use the vertical scroll bar to navigate between vehicle\equipment records or click **Record** on the command menu and select **Next** or **Previous**.
- There are several lists available to select values from, such as: “LFPC User ID”;

The *List of values* option is available for the following fields:

Main Window

- LFPC User ID

Card Info Tab

- Type of Card
- Type of Equipment
- Type of Plastic
- Emboss in Spanish

Equipment Info Tab

- Fuel & Maint
- Odometer Indicator
- Equipment State



It may be quicker to run queries using the Discoverer tool. (Discoverer training is available in a separate training course).

Notes:



PRACTICAL EXERCISE

1. Query all vehicle\equipment records attached to the current LFPC User ID.
2. Query all records that have card plastic type value of “S”.
3. Query all records that have an **Equipment State** of California (CA) or Arizona (AZ).

III. Fleet Card Maintenance



Please turn off your monitor and give your attention to the instructor.

a. Fleet Card Setup

To set up a new Fleet Card account, follow the steps below.

1. Enter the User ID in the LFPC User ID field and hit Tab on the keyboard.

The LFPC User ID fields populate.



Verify the LFPC populate, and that following fields are populated with these values




- Last Action Requested = A
- Depth = 12
- Sub Unit = 00000

These fields must be populated to be able to add the record.


2. Enter the account details:
 - **Tag\Equipment Number**
 - Cardholder's hierarchy (e.g. **Agency, Region, Unit**, etc)



It is important to enter the correct Tag Number. If an incorrect Tag Number is sent to the Bank a new Tag number will have to be assigned to the vehicle and a new account will need to be created.

3. Enter the setup\maintenance details:
 - Card INFO (e.g. Type of Plastic, Type of Card)
 - Equip INFO (e.g. Fuel and maintenance, Odometer Indicator)
 - Limit INFO (e.g. Cost\Fuel Trans Limit, Daily Trans Limit)
4. Enter the Profile Accounting details.
 - Accounting entered during Fleet Card Setup is the default accounting for the Fleet Card.
 - Profile Accounting can be updated through the Profile Accounting window.
5. Save the record by clicking  on the command bar.
 - The **Date sent to the Bank** field is populated after the data is downloaded to the Bank.
 - Accounting can only be changed if the record has not yet been sent to the Bank.
 - A record can only be removed if it has not yet been sent to the Bank. Click  then  on the command bar.





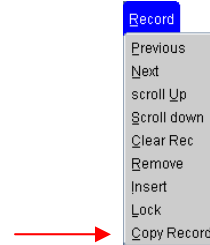
Make sure the Tag Number is correct before clicking  .

Notes:

b. Copying a Fleet Card Record


When there are several new Fleet Cards to set up in PCMS that have similar details, the first record entered can be copied and modified so the LFPC does not have re-enter information unnecessarily. Use the following steps:

1. Enter the first record and click  on the command bar.
2. Click **Record** on the menu bar and select **Copy Record**
3. Change any unique setup\maintenance details.
4. Click .
5. Repeat steps 2 through 4 as necessary.



c. Modifying a Fleet Card Account

To modify a Fleet Card account

1. Query a Fleet Card record
2. Verify that **Last Action Requested** does NOT display “A” and **Sent to Bank** and **Returned from Bank** fields are populated.
3. Change setup\maintenance details as necessary.
4. Click .

Guidelines to modifying a Fleet Card account

- All fields in Fleet Card Setup can be modified prior to a record being sent to the Bank.
 - **Last Action Code = A, Date Sent To Bank** is blank.
- No modifications can be made to a record that has been sent to but not yet returned from the bank.
 - **Last Action Code = A, M, T or R**
 - **Date Sent To Bank** is not blank
 - **Date Returned From Bank** field is blank
- Most fields can be modified once a record has returned from the Bank.
 - **Last Action Code = A, M, T or R**
 - **Date Sent To Bank** is not blank
 - **Date Returned Fm Bank** is not blank
- Updates to Profile Accounting can be done through Fleet Card Setup only if it is a new Fleet Card record and the record has not yet been sent to the Bank.
- New cards will only be issued when information in the magnetic strip or information embossed upon the card changes.



PRACTICAL EXERCISES

1. Create a new Fleet Card record using the following information:
 - Tag\Equipment Number: A11374
 - Cost Limits: Fuel = \$100.00, Daily trans = 03, Maint Trans = \$500, Gallon limit = 40, Gallon Trans Limit = \$50
 - Card is to be used by a Vehicle for fuel and maintenance.
 - Card should be a standard plastic.
 - Equipment City: Rockville.
 - Equipment State: MD
 - Equipment Zip Code: 20850
 - Codes: Program 448687 \ Dept 12 \ Agency 99 \ Region 01 \ Unit 02 \ Sub Unit 00000
 - Station: 0110
 - Accounting code: 7010101915
 - Distribution % = 100

2. Copy the new Fleet Card record and create a second record using the following unique field values:
 - Tag\Equipment Number: A287622
 - Cost Limits: Fuel = \$100.00, Daily trans = 03, Maint Trans = \$500, Gallon limit = 40, Gallon Trans Limit = \$50
 - Card is to be used by a Vehicle, for fuel and maintenance.
 - Card should be a standard plastic.
 - Equipment City: Beltsville.
 - Equipment State: MD
 - Equipment Zip Code: 20705
 - Codes: Program 448687 \ Dept 12 \ Agency 99 \ Region 01 \ Unit 02 \ Sub Unit 00000
 - Station: 0110
 - Accounting code: 7010101915
 - Distribution % = 100

IV. Replacing and Deleting Fleet Cards



Please turn off your monitor and give your attention to the instructor.

a. Last Action Codes

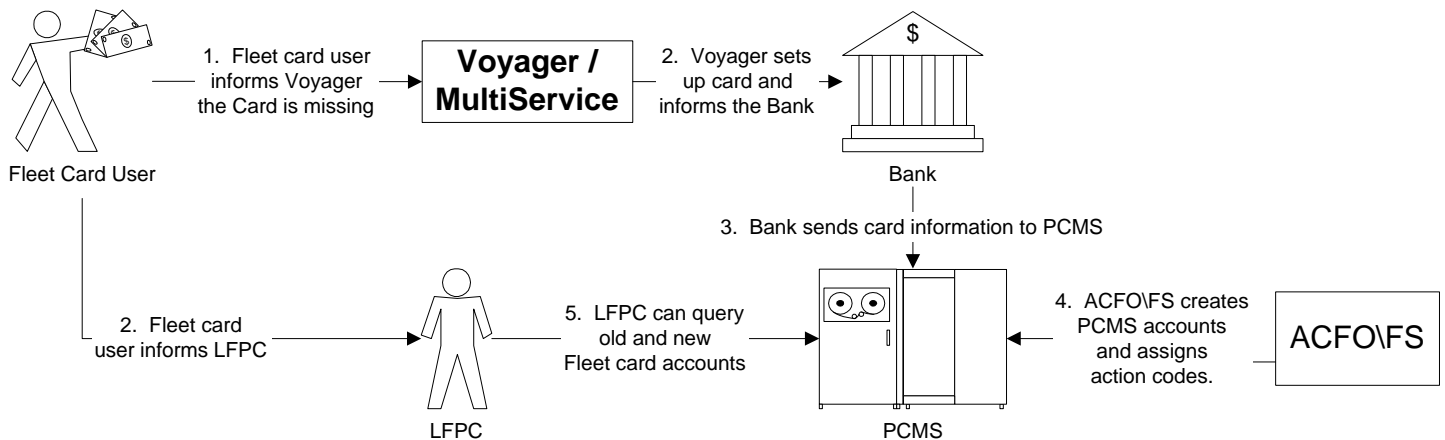
Fleet Card Setup uses the following codes to indicate what action should be taken. Only one code per day can be processed for a Fleet Card record, unless the code is “U”:

U = Update	A = Add	M = Modify	T = Transfer	R = Replace	D = Delete
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b. Lost and Stolen Cards


It is the Fleet Card user’s responsibility to report a lost or stolen card to Voyager. However, an LFPC has the authority to do so if the Fleet Card user has not reported it.

1. Voyager sets up a new account for the vehicle\equipment.
2. ACFS\FO creates a new account in PCMS.
 - Verify **Last Action Code** for the new account displays “A”
 - Enter the existing **Tag\Equipment Number**.
3. The system updates the **Voyager\Aviation Number** and the **Lost\Stolen Counter** fields.
4. ACFS\FO changes the **Last Action Code** of the old record to “D”.
5. The system populates the **Comments** field with the name of the person who reported the card lost\stolen and the date it was reported.
6. Both the old and new records will be available when the LFPC queries a Fleet card in PCMS. Use the scroll bar to navigate between records.



c. Replacement Cards


Over time, cards become damaged and need to be replaced. Follow these steps to request a replacement card.

1. Verify the record can be edited.
 - Last Action Code = **M, T, or R**
 - **Date Sent to Bank** is not blank
 - **Date Returned from bank** is not blank
2. Check the **Replace Card** box and click  on the Command Bar.
3. The record is sent to the bank with an action code of “**R**”
4. The system generates a duplicate card based on the card’s current details in the Fleet Card Setup window. (e.g., Tag\Equipment Number, hierarchy, Card information, etc.).

LFPC User Id	FSC9054F	First Name	SHIRLEY	M. I.	M	Last Name	AGNER
LFPC Agency	11	LFPC Region	01	LFPC Unit	03	LFPC Sub Unit	00000
				<input type="checkbox"/> Delete Card		<input checked="" type="checkbox"/> Replace Card	
Last Action Requested	R	Tag/Equipment Number	A279552	Card Expire	10-31-2003		
Program Code	448687	Dept	12	Agency	11	Region	01
		Unit	03	Sub Unit	00000		

d. Delete a Card

When a vehicle\equipment is taken out of service, it needs to be flagged as deleted in PCMS.

1. Verify the record can be edited.
 - Last Action Code = **M, T, or R**
 - **Date Sent to Bank** is not blank
 - **Date Returned from bank** is not blank
2. Check the **Delete Card** box and click  on the Command Bar.
3. The record is sent to the bank with an action code of “**D,**” notifying the bank the card is no longer valid.
4. ACFO/FS updates the **Return from Bank** field in PCMS.
5. PCMS will not allow any modifications to records with a **Last Action Code** of “**D.**”
6. Once a tag\equipment number is deleted, the number can not be re-used.

LFPC User Id	FSC9054F	First Name	SHIRLEY	M. I.	M	Last Name	AGNER
LFPC Agency	11	LFPC Region	01	LFPC Unit	03	LFPC Sub Unit	00000
				<input checked="" type="checkbox"/> Delete Card		<input type="checkbox"/> Replace Card	
Last Action Requested	D	Tag/Equipment Number	A238380	Card Expire	11-01-2003		
Program Code	448687	Dept	12	Agency	11	Region	01
		Unit	03	Sub Unit	00002		



PRACTICAL EXERCISES

1. Query the following record, and request a replacement card:
 - Tag\Equipment: A010214

2. Query the following record, and delete the card:
 - Tag\Equipment: A010210

Notes:

V. Update LFPC



Please turn off your monitor and give your attention to the instructor.

a. Window Overview

To access the window, click **Fleet Card** on the main menu and select **Update LFPC**.



Update the record as necessary.

Notes:

b. Updating an LFPC

When updating this information in PCMS contact the AFHC to have SAMS information updated as well.

Fields:

Fieldname	Description
User ID	The PCMS user identification number of the LFPC. (Required, alphanumeric, maximum 20 positions)
Region	The LFPC's organizational structure/hierarchy. (Non-entry fields.)
Unit	
Sub Unit	
First Name	The LFPC's first name. (Required, alphanumeric, maximum 12 positions)
Middle Initial	The LFPC's middle initial. (Required, alphanumeric, 1 position)
Last Name	The LFPC's last name. (Query field.) (Required, alphanumeric, maximum 20 positions)
Office Address Ln 1	The LFPC's office address. (Required, alphanumeric, maximum 36 positions)
Office Address Ln 2	Additional LFPC address information as needed. (Alphanumeric, maximum 36 positions)
Office City	The LFPC's office city. (Required, alphanumeric, maximum 25 positions)
Office State	The LFPC's office state. (Required, alpha, 2 positions)
Office Zip	The LFPC's office zip code. (Required, numeric, 5 positions)
Office Phone	The LFPC's office work phone. (Required, alphanumeric, 10 positions)
Office Fax Phone	The LFPC's office fax phone number. (Required, alphanumeric, 10 positions)
Office Email	The LFPC's email address. (Required, alphanumeric, maximum 50 positions)

Updating New LFPC details

When an LFPC is initially given access to PCMS, only the user id, name, office phone, and hierarchy appear in PCMS. Before you can add a fleet card record to a new LFPC you need to complete the LFPC information (e.g., address, phone, etc.) located on the Update LFPC window

1. Click **Fleet Card** on the main menu and select **Update LFPC**.

The Update LFPC window opens.

2. Enter the User ID and click on the command bar.

The LFPC User record displays.

3. Enter all appropriate LFPC information and click on the command bar.

4. Click **Action** on the menu and select **Exit** to return to the main window.

Updating Existing LFPC details

The steps below describe the process to update information for LFPCs whose records have previously been completed in they system.

1. Click **Fleet Card** on the main menu and select **Update LFPC**.

The Update LFPC window opens.

2. Enter the User ID and click on the command bar.

The LFPC User record displays.

Or, click twice to retrieve all user records and scroll through the results to find the desired record.

3. Enter all appropriate LFPC information and click on the command bar.

4. Click **Action** on the menu and select **Exit** to return to the main window.

The system will make the following updates in the Fleet Card Setup window:

- **LFPC Action Code** will display an **L** (LFPC Information Change) in each record tied to that LFPC to indicate LFPC changes were made.
- **LFPC Change Sent On** date will be updated when the data is processed by ACFS\FO.
- **LFPC Change Returned On** date will be updated with the date the bank acknowledgement is received.

The “*L*” action code and date fields allow LFPC information to be changed without preventing additional modifications to the equipment records. If both a change to the LFPC information and a change to any equipment record for that LFPC are made, the addition, deletion, modification, replacement, or transfer will be sent for processing with the updated LFPC information. All equipment records for this LFPC will be sent to the bank, with an LFPC Action Code of “*L*” and with the appropriate action code of **A**, **D**, **M**, **R**, or **T**, depending if additional actions were taken on the record.

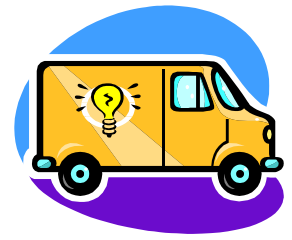
Notes:

VI. Summary and Review.



Please turn off your monitor and give your attention to the instructor.

1. What are the main functions the LFPC performs using Fleet Card Setup?
2. What are the steps for an LFPC when setting up a new Fleet Card account? (Walk the instructor through the steps)
3. What would prevent a new Fleet Card record from being modified in Fleet Card Setup?
4. If a Cardholder has a damaged purchase card how do they obtain a replacement?



Lesson 7: Transfer Equipment

Lesson Description

In Lesson 7 LFPCs and AFHCs will learn how to transfer equipment records to other LFPC accounts in PCMS. This is the concluding lesson in the Fleet PCMS training course.

Training Objectives

At the conclusion of this lesson, PCMS LFPC's and AFHC's will be able to:

1. Query and transfer equipment records.

Methodology

This lesson will be delivered using a combination of lecture and presentation, and discussion. Group discussion and trainee interaction will be used to stimulate recall of policy information and establish a knowledge base on which to build in subsequent lessons.

References

None

Enclosures

- (1) Fleet PCMS User's Guide, USDA\PMT, June 2006;
- (2) Fleet PCMS Quickguide, USDA\PMT, October 2000;

I. Transfer Equipment Overview



Please turn off your monitor and give your attention to the instructor.

a. Transfer Equipment Window

To access the Transfer Equipment window, click **Fleet Card** on the main menu and select the **Transfer Equipment**.



Enter details in the fields to initiate a request to transfer equipment between LFPCs.

The screenshot shows the 'Transfer Equipment' window with the following sections:

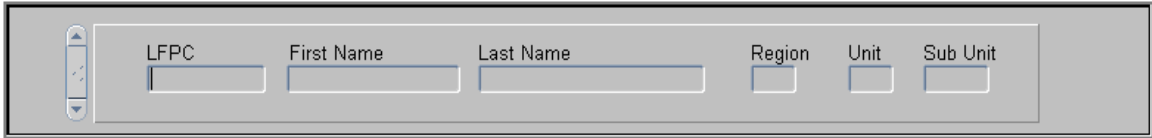
- Header:** LFPC, First Name, Last Name, Region, Unit, Sub Unit
- Equipment Section:** A table with columns: Tag/Equip. #, Type of Equip, Sub Unit, Last Action, Returned From Bank, Check to Transfer.
- Transfer To:** LFPC, Unit, Sub Unit, Equip. City, Equip. State, Equip. Zip, Agency, Station, Accounting Code, Distrib %.
- Transfer Equipment From:** All, Type, By Type, Unit, Sub Unit, By Unit, By Sub Unit.
- Buttons:** Transfer Records

Notes:

b. Fields

The following is a brief description of each field in the Transfer Equipment window.

LFPC Details



The screenshot shows a form with six input fields: LFPC, First Name, Last Name, Region, Unit, and Sub Unit. Each field is represented by a rectangular box with a label above it. The LFPC field is a single-line text box, while the others are also single-line text boxes. The Region, Unit, and Sub Unit fields appear to be dropdown menus.

Fieldname	Description
LFPC (Required field)	The LFPC user identification number. (Query field.)
First Name (Required field)	The LFPC’s first name. (Query field.)
Last Name (Required field)	The LFPC’s last name.
Region	The region where the Fleet card will reside. (Query field.)
Unit	The unit where the Fleet card will reside. (Query field.)
Sub-Unit	The sub-unit where the Fleet card will reside. (Query field.)

Notes:

Equipment

The following fields detail the equipment attached to the current LFPC:

The screenshot shows a software interface titled "Equipment Section". It features a table with the following columns: "Tag/Equip. #", "Type of Equip", "Unit", "Sub Unit", "Last Action", "Returned From Bank", and "Check to Transfer". The table contains several empty rows. Below the table, there are input fields for "Agency", "Station", "Accounting Code", and "Distrib %". A "Transfer Records" button is located at the bottom of the interface.

Fieldname	Description
Tag\Equipment # (Query field)	The tag\equipment number as it appears on the Fleet card.
Type of Equip (Query field)	The type of equipment: A = Aircraft B = Boat E = Equipment P = Pool Card V = Vehicle
Unit (Query field)	The unit where the equipment resides.
Sub Unit (Query field)	The sub-unit where the equipment resides.
Last Action (Non-entry field)	Indicates the last action performed on the record. A - add, M - modify, D - delete, L - LFPC Information Changed, R -replacement, T - transfer of equipment, and U - update.
Returned From Bank (Non-entry field)	Date the fleet record was returned from the bank.

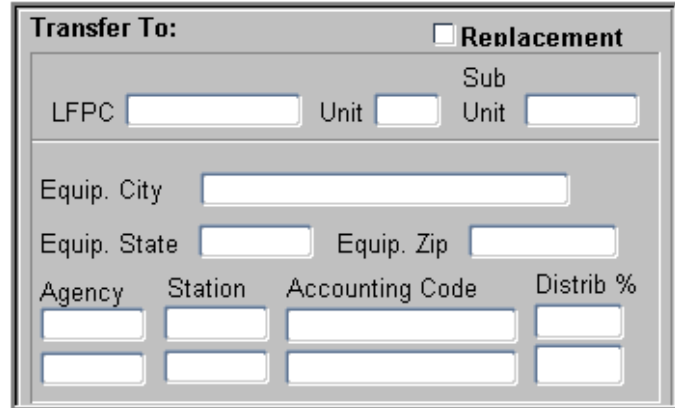


Fieldname	Description
Check to Transfer (Non-entry field)	Click in this box to indicate the equipment to transfer.
Agency	The agency code the transactions are charged against.
Station (Non-entry field)	The accounting station code the transactions are charged against.
Accounting Code (Non-entry field)	The accounting code the transactions are charged against.
Distrib % (Non-entry field)	Enter the percentage to be applied to the transaction amount.

Notes:

Transfer To

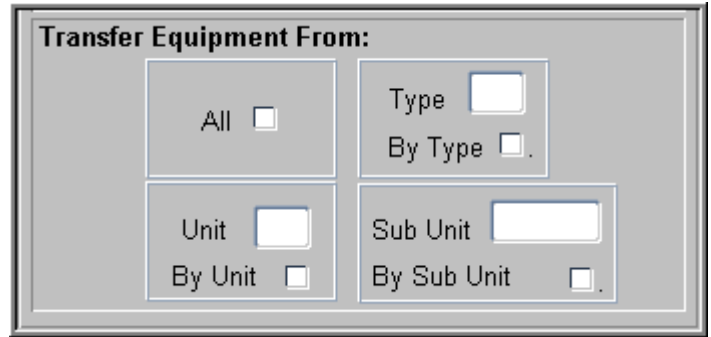
The following fields are optional depending on the type of transfer:



Fieldname	Description
Replacement	Check the box to transfer all equipment from the previous LFPC to the replacement LFPC. When this box is checked, only the LFPC ID is updated; all other fields in this section remain blank. The system will automatically mark all equipment for transfer to the replacement LFPC.
LFPC (Required field)	LFPC user id that the equipment is to be transferred to.
Unit	The unit where the equipment will reside.
Sub Unit	The sub-unit where the equipment will reside.
Equip. City	The city where the equipment will reside.
Equip. State	The state where the equipment will reside.
Equip. Zip	The zip where the equipment will reside.
Agency	The agency code against which transactions are charged.
Station	The accounting station code against which transactions are charged.
Accounting Code	The accounting code against which transactions are charged.
Distrib %	The percentage to be applied to the transaction amount.

Transfer Equipment From

If you are transferring all of the records or just specific records from those listed in the Equipment Section, use the following fields to aid your selection of records for transfer:



Fieldname	Description
All	Check this box to have the system automatically mark all equipment for transfer.
Type\By Type	Enter the value for the type of equipment you wish to transfer in the Type box and check By Type to have system automatically mark all equipment of that type for transfer.
Unit\By Unit	Enter the unit in the Unit box and check By Unit to have system automatically mark all equipment from that unit for transfer.
Sub Unit\By Sub Unit	Enter the sub unit in the Sub Unit box and check By Sub Unit to have system automatically mark all equipment from that sub unit for transfer.

Notes:


II. Querying Equipment




Please turn off your monitor and give your attention to the instructor.

Queries are performed based on LFPC. That is, to query for equipment you must first retrieve the LFPC associated with that equipment and then query the equipment information.

a. Query equipment by LFPC or Group



- Click  on the command bar to obtain all vehicle\equipment records attached to the LFPC UserID you logged on with.

Or

Enter the **LFPC** ID number to search by LFPC or the **Region, Unit** or **Sub Unit** to search by group and click  on the command bar.

- Use the scroll bar to navigate between vehicle\equipment records. You can scroll through records for LFPCs or equipment within the same LFPC.

b. Query by equipment

- Follow the instructions above to query by LFPC.
- Place the cursor in one of the Equipment fields and click  on the command bar to clear all fields.
- Enter a search value in a field in the equipment section of the window.
- Click  to perform the query.

c. Tips

- The % wildcard can be used.
- The **List of Values** option is available for the **LFPC** User ID field.

Notes:

PRACTICAL EXERCISE

1. Query all vehicle\equipment records attached to the LFPC UserID you logged on with.
2. Query all vehicle\equipment records in the Region "01".

III. Rules for Transferring Equipment



Please turn off your monitor and give your attention to the instructor.

a. Overview

When transferring equipment, the AFHC and LFPC must be aware that the LFPC and the equipment record can have a differing hierarchy/SAC (security access control) as it is possible for either of these to be changed by the AFHC or LFPC depending upon the transfer desired. For example, LFPC's SAC is 11 01 02 00000, equipment transferred is 11 01 02 00001 and 11 01 02 00002. The equipment record SAC and accounting record SAC are always the same.

b. Rules

Apply the following rules when transferring:

1. The AFHC\LFPC can only transfer equipment that is within their SAC scope of authority. Meaning that:
 - a. LFPCs whose SAC stops at the unit level may only transfer equipment to a sub-unit with the unit.
 - b. AFHCs whose SAC stops at the region level may only transfer equipment to units or sub units within the region.
 - c. AFHCs whose SAC stops at the department or agency level may transfer equipment to any unit or sub-unit within the department or agency respectively.

2. A transfer results in the fleet equipment being moved to a new LFPC, new unit, or sub-unit. In addition to one of these moves, the equipment's physical location and accounting code may also be changed.
 - a. If the equipment's physical location is changed, you must enter an entire location change (i.e., City, State, Zip and Profile Accounting).
 - b. If the equipment's profile accounting is changed, you must enter a value in **Agency**, **Accounting Code**, and **Distribution Percent**.

Notes:

3. If a transfer is taking place because the LFPC is being replaced, check the Replacement box and enter the UserID of the LFPC that the equipment is being transferred to. All of the equipment records will automatically be marked for transfer when Replacement is checked.



When a Replacement transfer is made, the new LFPC's address must be entered using Update LFPC before any of the transferred records will be sent to the bank.

4. Equipment records that do not have **Returned Fm Bank** dates cannot be transferred and the system will generate a User Message to monitor the record field. When **Returned Fm Bank** is populated, the equipment record can then be queried and transferred.
5. Changes to the accounting on a piece of equipment need to be made before making the transfer.



When completing transfers between sub units, do not try to update the equipment's profile accounting unless **Return Fm Bank** is populated, otherwise the system will process the transfer record improperly.

Notes:

IV. To Transfer an Equipment Record



Please turn off your monitor and give your attention to the instructor.

a. Transferring Equipment

To transfer an equipment record:

1. Query an LFPC and the associated equipment records
2. Use one of the following options to select the equipment records to be transferred:
 - Check the **Check to Transfer** box at the end of desired record(s)
 - Select an option in the **Transfer Equipment From** section
 - Check the **Replacement** box to transfer all records when an LFPC is being replaced

Tag/Equip. #	Type of Equip	Unit	Sub Unit	Last Action	Returned From Bank	Check to Transfer
A185896	V	24	00000	D	08-08-2001	<input type="checkbox"/>
A185897	V	24	00000	D	10-29-2001	<input type="checkbox"/>
A208647	V	24	00000	D	08-08-2001	<input type="checkbox"/>
A208658	V	24	00000	D	02-10-2000	<input type="checkbox"/>
A229346	V	24	00000	D	10-29-2001	<input type="checkbox"/>
A238518	V	24	00000	T	08-07-2001	<input type="checkbox"/>
A251012	V	24	00000	D	06-29-2000	<input type="checkbox"/>
A251271	V	24	00000	T	08-07-2001	<input type="checkbox"/>
A251272	V	24	00000	D	10-29-2001	<input type="checkbox"/>
A251277	V	24	00000	D	12-14-2001	<input type="checkbox"/>

3. Enter all of the values in the Transfer to section
 - Required fields must have values
 - When replacing an LFPC only the LFPC UserID must be entered, all other fields will be locked

4. Click Transfer Records at the bottom of the Equipment section of the window.
 - When the transfer is complete, the list of equipment updates. Contact the LFPC to whom the equipment is being transferred to verify the transfer has completed.
 - A User Message will be generated if the transfer cannot be completed.
 - If the record has not returned from the Bank, a User Message will be generated and sent to the LFPC indicating the record needs to be monitored.
 - An equipment record that has been modified as a result of transfer will have a Last Action Code of “T”



If equipment is being transferred because an LFPC is leaving, the LFPC cannot be dropped in SAMS until ALL equipment has been transferred from his/her account. (See SAMS training)



PRACTICAL EXERCISES

1. Query the LFPC you logged on with.
2. Select all records with a Type V and transfer them to the trainee LFPC sitting to your right.
3. Query your LFPC again.
4. Transfer ALL records to a replacement LFPC, the trainee LFPC to your left.

Notes:

V. Summary and Review.



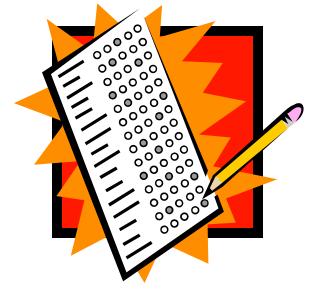
Please turn off your monitor and give your attention to the instructor.

1. What are the steps an LFPC takes to transfer equipment? (Walk the instructor through the steps)

2. What would prevent a transfer from being completed?

3. What is the **Replacement** check box for? When would it be used?

4. How do you transfer equipment between groups? (Walk the instructor through the steps)



Final Assessment

Assessment Description

The final assessment requires the AFHC\LFPC to apply the knowledge learned in Lessons 1-7 of the Fleet PCMS training.

Assessment Objectives

At the conclusion of this assessment, LFPCs and AFHCs will be able to demonstrate their ability to:

1. Access both the PCMS training and production databases
2. Change their PCMS production password
3. Navigate PCMS
4. Set up a new Fleet Card account
5. Transfer Equipment

Methodology

Trainees will individually undertake the assessment exercises. The instructor will be available to answer questions.

Exercise 1



1. Log on to the Production database with the UserID and password provided by your Instructor.
2. Change your password.
3. Review your Profile Accounting details.
4. Log off PCMS.

Exercise 2



1. Log onto the training database, using the trainee UserID and password provided by the instructor.
2. Set up a new Fleet Card account using the following information:
 - Tag\Equipment Number: A268467
 - Cost Limits: Fuel = \$100.00, Daily trans = 03, Maint Trans = \$500, Gallon limit = 40, Gallon Trans Limit = \$50
 - Card is to be used by a Vehicle for fuel and maintenance
 - Card should be a standard plastic
 - Equipment City: Rockville
 - Equipment State: MD
 - Equipment Zip Code: 20850
 - Codes: Program 448687 \ Dept 12 \ Agency 99 \ Region 01 \ Unit 02 \ Sub Unit 00000
 - Station: 0110
 - Accounting code: 7010101915
 - Distribution % = 100

Exercise 3



1. Logged on to the training database transfer Fleet equipment using the following information:
 - Transfer all Boats
 - Recipient: LFPC seated to your right
 - Location: Beltsville, MD, 20705
 - Profile Accounting: Agency = 99, Station = 0110, Accounting Code = 901601, Distribution % = 100