



FAMS 3.0 Job Aid

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Target Audience:	Department Users and FAMS Team
Purpose:	Instruct target audience how to use the key functionalities of FAMS 3.0 web application

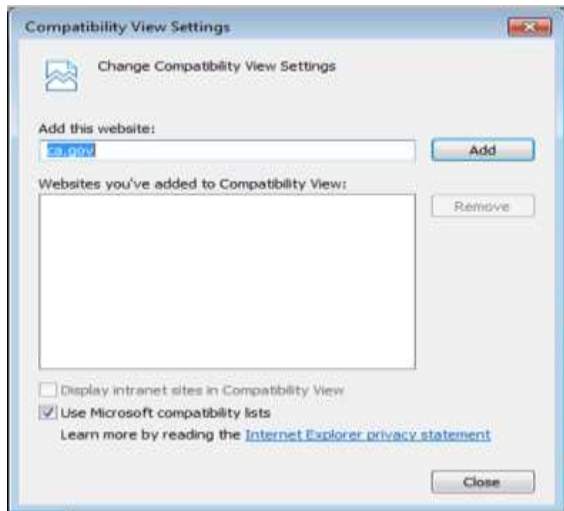
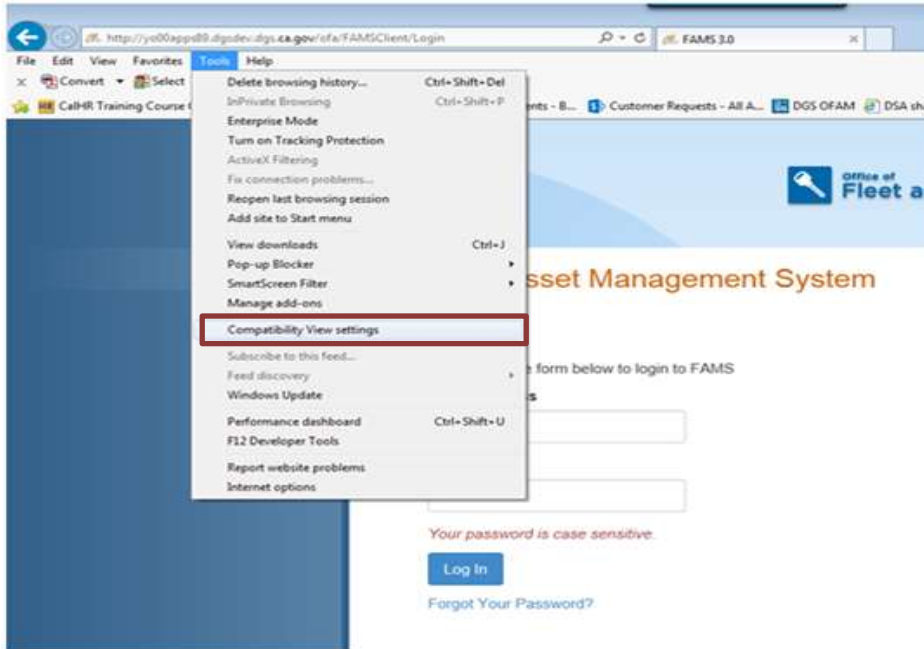
Table of Contents

1	General Information.....	4
1.1	Remove 'ca.gov' in the compatibility view setting under Internet Explorer (IE) Tools....	4
1.2	Session Time Out	4
1.3	Clear browser history	5
2	Log in	5
2.1	Email confirmation	5
2.2	First time log in	6
3	Forgot Password.....	6
3.1	Reset your password message.....	7
3.2	Reset password	7
4	Administration	8
4.1	My Account.....	8
4.1.1	My profile	8
4.1.2	Change Password	8
4.2	User Administration.....	9
4.2.1	Create new user	9
4.2.2	User Account management.....	10
5	Fleet Management	11
5.1	Asset.....	11
5.1.1	Asset Search	11
5.1.2	Quick Search	11
5.1.3	Advance Search	11
5.1.4	Asset Export	12
5.1.5	Asset Search Results (FI\$Cal).....	12
5.1.6	Asset Update (FI\$Cal)	13
5.1.7	Asset Search Results (Non-FI\$Cal)	14
5.1.8	Asset insert and update (Non-FI\$Cal)	15
5.1.9	Asset Bulk Upload (FI\$Cal & Non-FI\$Cal)	15
5.2	Usage	17
5.2.1	Usage Search.....	17
5.2.2	Usage Export.....	18
5.2.3	Usage Search Results	18
5.2.4	Usage Update.....	19
5.2.5	Equipment Usage History	20
5.2.6	Usage Upload.....	20

5.2.7	Usage Update Tips	22
5.3	Agency Fuel.....	23
5.3.1	Fuel Search	23
5.3.2	Fuel Export	23
5.3.3	Fuel Search Results.....	24
5.3.4	Fuel Insert.....	24
5.3.5	Fuel Update	25
5.3.6	Fuel Upload	25
6	Reports	27
6.1	Report Criteria Screen	27
6.2	Report result page	27
7	Documentation	28
7.1	Bulk Upload Template.....	28
7.2	User Manual	28
8	Support	28
9	Appendix 1: FAMS 3.0 Web Portal Data Entry Validation Matrix	28
10	Appendix 2: Asset, Usage and Fuel Data File Layout Specifications	28
11	Appendix 3: FAMS Portal- Asset Data Source Priority Matrix	28

1 General Information

1.1 Remove 'ca.gov' in the compatibility view setting under Internet Explorer (IE) Tools

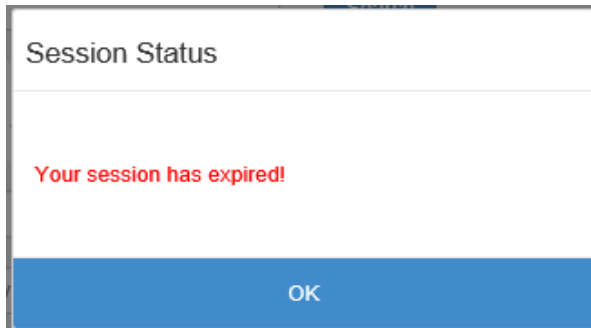


1.2 Session Time Out

A session expiration message will pop up if there is no activity on your session for 20 minutes.

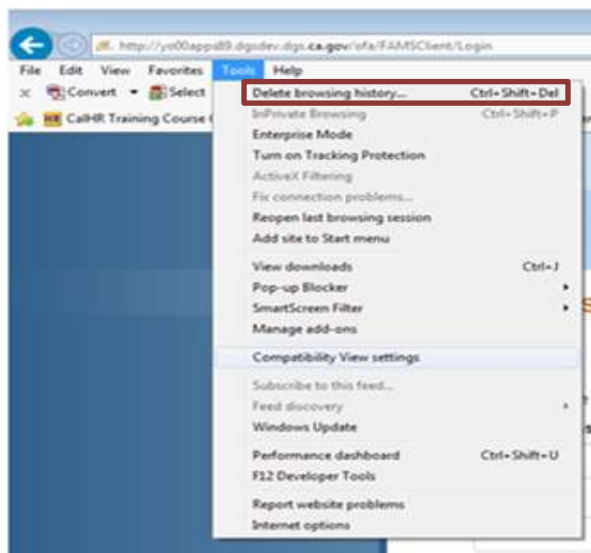
Single session (one FAMS 3.0 screen open) time out: After you click on 'OK', it will take you to the log in screen.

Multi sessions (multiple FAMS 3.0 screens open) time out: After you click on 'OK' on the expired session while the other session is still active, it will take you to the landing page.



1.3 Clear browser history

If no response from menu button in FAMS 3.0, try to re-log into the system. If the issue still exists, please delete browsing history as below screen.



2 Log in

2.1 Email confirmation

Department Admin, FAMS Analyst and IT Admin can create new users with a valid email address (please see chart in section 4.2.2 for the user role matrix). Once new user is created, confirmation message will be sent to the registered email address.

Please check your inbox or junk email for email confirmation link with temporary password from FAMS_Noreply@dgs.ca.gov

Please note: Email confirmation link will expire after 72 hours. If the link has expired, please request your department admin or FAMS analyst to resend email confirmation message through account management.

2.2 First time log in

Login

Please use the form below to login to FAMS

Email Address

Password

Your password is case sensitive.

- New user created in FAMS 3.0 first time log in:
 1. User confirms his email address by clicking on email confirmation link
 2. User logs in with his email address and the temporary password sent by FAMS_Noreply@dgs.ca.gov
 3. Once user logs in, system will require password change.
- Existing FAMS 2.0 user first time log in:
 1. User clicks on "Forgot Your Password" link from login screen
 2. System sends password reset link to user's email address
 3. User clicks on password reset link sent by FAMS_Noreply@dgs.ca.gov
 4. User resets password in FAMS 3.0 to log in
- After login, landing page is Asset Search Page. You can see your user role as well as FI\$Cal and confidential access status below the email address on each page. Click on Log Out to log out of the system.

3 Forgot Password

Forgot Password

Email Address

- Enter valid email address where the reset password email will be sent.
- Click on 'Reset' button to generate a reset password email and send it to email address

3.1 Reset your password message

- Please check your inbox or junk email for password reset link from FAMS_Noreply@dgs.ca.gov
- **Please note: Password reset link will expire after 72 hours. If the link is expired, please request password reset from your Department Admin or FAMS Analyst.**

3.2 Reset password

Reset Password

The form contains the following elements:

- New Password**: A text input field with the placeholder text "Password".
- Confirm Password**: A text input field with the placeholder text "Confirm Password".
- Reset**: A blue button with white text, highlighted with a red border.
- Cancel**: A blue button with white text.

Clicking on Reset button will reset the password to that entered in New Password and Confirm Password fields. The contents of the 2 fields must match.

Password requirements:

- Password must contain at least eight characters;
- Password need to be changed every 90 days;
- Password must contain at least three of the following four elements:
 - Uppercase letters
 - Lowercase letters
 - Numeric (0 through 9)
 - Special characters: ~!@#\$%^&* _-+=`|\(){}[]:;'"<>,.?/
- Password must not be reused for twelve (12) iterations;
- The user account must be automatically disabled after six (6) unsuccessful logon attempts.

4 Administration

4.1 My Account

4.1.1 My profile

My Account

User Role	<input type="text" value="IT Admin"/>
Email Address	<input type="text" value="Wayne.Lo@dgs.ca.gov"/>
First Name	<input type="text" value="Wayne"/>
Last Name	<input type="text" value="Lo"/>
Phone Number	<input type="text" value="(111) 111-1111"/>

- User role and Email address cannot be modified through 'my profile'
- First name, last name and phone number can be updated by user
- Click on 'Save' button to save updated user profile information to database

4.1.2 Change Password

Change Password

Current password	<input type="text" value="Password"/>
New password	<input type="text" value="Password"/>
Confirm new password	<input type="text" value="Confirm Password"/>

Enter current password and new password to change to new password. The New Password and Confirm new password field contents must match.
Click on 'Save' button to change the password

Password requirements:

- Password must contain at least eight characters;
- Password need to be changed every 90 days;
- Password must contain at least three of the following four elements:
 - Uppercase letters
 - Lowercase letters
 - Numeric (0 through 9)
 - Special characters: ~!@#\$\$%^&* _-+=`|\(){}[]:;'"<>.,.?!/
- Password must not be reused for twelve (12) iterations;
- The user account must be automatically disabled after six (6) unsuccessful logon attempts.

4.2 User Administration

- Only applies to Department admin, FAMS analyst and FAMS manager user roles.

4.2.1 Create new user

Create User

User Role	<input type="text" value="Please Select"/>
User Agency	<input type="text" value="Please Select"/>
Email Address	<input type="text" value="Email Address"/>
First Name	<input type="text" value="First Name"/>
Last Name	<input type="text" value="Last Name"/>
Phone Number	<input type="text" value="Phone Number"/>
Access to confidential information <input type="checkbox"/> Conf Info	
<input type="button" value="Save"/> <input type="button" value="Cancel"/>	

- Enter new user information to create the new user
- Email address must unique in FAMS
- Click on 'Save' button to save new user profile to database
- Confirmation email will be sent to email address with temporary password

4.2.2 User Account management

User Account Management

User List

Last Name	First Name	Email Address	Agency	Phone Number	Role Name	Confid. Access	Active	Locked	Email Confirmed	Resend Email Confirmation	Edit
dyb	dyb	dyb	FOOD & AG	(123) 123-1231	Department User	✖	✔	✔	✖	Resend	
Stagston	Sty	AirResourceBoardNew@tje.ca.gov	ARB	(916) 375-4729	Department User	✔	✔	✖	✖	Resend	

- Click on edit button to open up editable fields: last name, first name, agency, phone number, role name, confidential access, active (account), locked (account) and resend email confirmation.
 - You can deactivate user account if the user no longer needs access to FAMS.
 - You can unlock user account if the user account is locked after max password attempts.
 - You can resend email confirmation if new user email confirmation link is expired.
 - Agency edit only applies to FAMS Analyst and FAMS Manager.
- Click on arrow icon to sort last name by ascending or descending order. Click on filter icon next to last name, first name, email address and role name to populate filter box and then type in the value in below red circled blank box before click on Filter. Click on Clear to clear all the filters.

Last Name	First Name	Email Address
Abila	Victor	
Acevedo	Roy	CA.GOV
Adams	Gary	
Adams	Robin	
Admin	Global	

Show items with value that:

Is equal to

And

Is equal to

- To create new user with User Administration follow the below user role matrix:

	User role selection	User agency selection
Department Admin	Department User	Default agency
FAMS Analyst	Department Admin	Any agency
	Department User	
FAMS Manager	FAMS Analyst	Any agency
	Department Admin	
	Department User	

5 Fleet Management

5.1 Asset

5.1.1 Asset Search

Navigation: Log in as department user → Fleet Management → Asset → Search

Quick Search

Advance Search

Field with * beside the label indicates it is a mandatory field

5.1.2 Quick Search

- Only need to enter Equipment No or FI\$Cal Asset ID (FI\$Cal Asset ID field is only viewable and applies to FI\$Cal department) (If you are FAMS Analyst or FAMS Manager, quick search will search equipment # across all agencies in the database)

5.1.3 Advance Search

- Agency, Asset category, Asset Type, Make and Model are text fields that populate with a dropdown when user inputs 3 characters for selection.
- Asset Category, Asset Type, Make and Model are multi selection fields with comma separation.
- Agency is required. Other fields help narrow down the search results. If you are FAMS Analyst and FAMS manager, you can choose different agency. If you are department user or department admin, agency field is locked to your default agency.
- Entering a FI\$Cal Agency will return FI\$Cal results Grid View Interface (GVI).
- Entering a Non FI\$Cal Agency will return Non FI\$Cal results GVI.
- Click on Search button after entering search criteria will perform search and return results in GVI

5.1.4 Asset Export

Advance Search

Agency *	<input type="text" value="Agency"/>	Asset Category	<input type="text" value="Asset Category"/>
Asset Type	<input type="text" value="Asset Type"/>	Year	<input type="text" value="Four digit Year"/>
Make	<input type="text" value="Make"/>	Model	<input type="text" value="Model"/>
Equipment No	<input type="text" value="Equipment Number"/>	License Plate	<input type="text" value="License Plate"/>
Acquisition Delivery Date	<input type="text" value="From"/> <input type="button" value="📅"/>	<input type="text" value="To"/> <input type="button" value="📅"/>	

- Enter search criteria
- Click on 'Export' button to export the search results into csv file
- Save the file to any location (local or network)

5.1.5 Asset Search Results (FI\$Cal)

Fleet Asset Management

Asset Search Results (FI\$Cal)

Showing Results For: General Services, Department of

[Return to Asset Search](#)

FI\$Cal Field

Published	Data Warehouse	FI\$Cal Asset	FI\$Cal Exempt	Decoded VIN	Active	FI\$Cal Asset ID	Equipment #	Asset Category	Model Year	VIN	Make
⊘	⊘	⊙	⊘	⊘	⊙	000000000000	⊘	N/A	⊘ 0	5129444444444444	⊘ N/A
⊙	⊙	⊘	⊘	⊙	⊘	N/A	00000020	Ground	1985	1FA8P2200PK281685	FORD
⊙	⊙	⊘	⊘	⊙	⊘	N/A	00000125	Ground	1962	1FTDF15F2CRA18437	FORD
⊙	⊙	⊘	⊘	⊙	⊘	N/A	00000159	Ground	1964	1G1AX88R8E0109813	CHEVROLET
⊙	⊙	⊘	⊘	⊙	⊘	N/A	00000161	Ground	1964	1G0CC14A8E8223003	CHEVROLET
⊙	⊙	⊘	⊘	⊙	⊘	N/A	00000261	Ground	1967	1B36D36D8F288598	DODGE

- Field label in orange color label are FI\$Cal fields
- New asset insert need to be performed through FI\$Cal
- Field validation rules refer to appendix 1 for validation matrix quick view
 - Warning message indicator ⚠
 - Error message indicator ❗
- Click on ▼, open up the filter box for indicator fields (Published, Data Warehouse, FI\$Cal Asset, FI\$Cal Exempt, Decoded VIN, Active) and Equipment Number
- Click on ↑ next to equipment #, sort the equipment # in descending or ascending order
- Indicators are only available in web screen and will not be included in export file
- Click on [Return to Asset Search](#) go back to screen criteria screen

FI\$Cal Asset GVI Indicators Condition Matrix:			
Indicator	Condition	Icon	Tooltip (text displayed when user mouse rolls over icon)
Published	Asset meets all the validation rules and ready to be inserted into data warehouse	✓	Yes
	Asset does not meet all the validation rules and cannot be inserted into data warehouse	✗	No
Data Warehouse	Asset is inserted into data warehouse after ETL run at 12:00am and 12:00pm and will be included in the reports	✓	Yes
	Asset is not inserted into data warehouse and will not be included in the reports	✗	No
FI\$Cal Asset	Asset in FI\$Cal (only apply to FI\$Cal agency)	✓	Yes
	Asset in FI\$Cal (only apply to FI\$Cal agency)	✗	No
FI\$Cal Exempt	Asset exempt from FI\$Cal reporting	✓	Yes
	Asset is NOT exempt from FI\$Cal reporting	✗	No
Decoded VIN	VIN is decoded by VIN decoder	✓	Yes
	VIN is not decoded by VIN decoder	✗	No
Active	Asset is active	✓	Yes
	Asset is disposed if meeting following conditions: Published asset with disposition date, disposition sold amount and disposition method	✗	No

5.1.6 Asset Update (FI\$Cal)

- Double clicking on a row will open the row in form for editing
- FI\$Cal fields are labeled in orange and protected from editing
- Field validation rules refer to appendix 1 for validation matrix quick view
- Click on 'Update' button save edited data into database
- Click on 'Cancel' button returns to search result GVI
- Exception rules for certain FI\$Cal fields are documented in FAMS Portal – Asset Data Source Priority Matrix in Appendix 3

5.1.7 Asset Search Results (Non-FI\$Cal)

Fleet Asset Management

Asset Search Result (Non-FI\$Cal)

Showing Results For: Franchise Tax Board

[Return to Asset Search](#)

+ Add new record		Bulk Upload							
Published ▼	Data Warehouse ▼	Decoded VIN ▼	Active ▼	Equipment Num ↑	Asset Category	Model Year	VIN	Make	
✓	✓	✗	✗	02CL10458	Ground	2001	2CL10458	CATERPILLAR	
✓	✓	✗	✓	12345	Ground	2015	12345678909876543	HONDA	
✗	✗	✗	✓	⚠ 123456789	Ground	1996	123456789	Cushman	

- Click on ▼, open up the filter box for indicator fields (Published, Data Warehouse, FI\$Cal Asset, FI\$Cal Exempt, Decoded VIN, Active) and Equipment Number
- Click on ↑ next to equipment #, sort the equipment # in descending or ascending order
- Warning message indicator ⚠ ; Error message indicator ❗
 - Indicators are only available in web screen and will not be included in export file
- Click on [Return to Asset Search](#) go back to screen criteria screen

Non FI\$Cal Asset GVI Indicators Condition Matrix:			
Indicator	Condition	Icon	Tooltip (text displayed when user hovers mouse over icon)
Published	Asset meets all the validation rules and ready to be inserted into data warehouse	✓	Yes
	Asset does not meet all the validation rules and cannot be inserted into data warehouse	✗	No
Data Warehouse	Asset is inserted into data warehouse after ETL run at 12:00am and 12:00pm and will be included in the reports	✓	Yes
	Asset is not inserted into data warehouse and will not be included in the reports	✗	No
Decoded VIN	VIN is decoded by VIN decoder	✓	Yes
	VIN is not decoded by VIN decoder	✗	No
Active	Asset is active	✓	Yes
	Asset is disposed	✗	No

5.1.8 Asset insert and update (Non-FI\$Cal)

- Click on ‘Add new record’ button open up pop up screen for entering non FI\$Cal asset
 - Fields with red * are required
 - Click ‘Add Asset’ button to save data to database
 - Click on ‘Cancel’ button to return to search result GVI
- Double clicking on a row will open up pop up screen in form for editing
 - Click ‘Update’ button to save data to database
 - Click on ‘Cancel’ button to return to search result GVI
- **Note: Disposed asset cannot be updated before reactivation.**
- **No ‘Update’ button is available for disposed asset pop up screen**
- Field validation rules refer to Appendix 1 for validation matrix quick view
- Confidential asset insert should be only conducted by the user with confidential access
 - FAMS 3.0 will not prevent non confidential user to insert confidential asset
- Click on ‘Bulk Upload’ button to upload a csv file of assets
 - **Upload file must follow the export template, refer to Appendix 2 for layout spec**

5.1.9 Asset Bulk Upload (FI\$Cal & Non-FI\$Cal)

Navigation: Log in as department user → Fleet Management → Asset → Upload

Asset Bulk Upload

- Browse to location of file (local or network) and click save to perform bulk upload
- **The file is required to be in csv format and follow the export template**
 - **Refer to Appendix 2 for asset data layout spec**
- Confidential asset bulk upload should be conducted by the user with confidential access
 - FAMS 3.0 will not prevent non confidential user to upload confidential asset
- If the upload file contains invalid format or duplicate VIN, or fails the below minimal validation rules, an error message will display.
 - Equipment number: Alphanumeric value plus dash, space, period and slash
 - Model Year: Must be a numeric value between 1900 and 2099
 - Purchase price: Numeric value, up to 9 characters in length
 - Annual Lease Rental Rate: Numeric value, up to 9 characters in length
 - Acquisition Mileage: Numeric value, up to 9 characters in length
 - Disposition Sold Amount: Numeric value, up to 9 characters in length

Bulk upload file error message follows 2 steps error sequence:

- Layout mismatch;
- Minimal data value validation & duplicate VIN check

If asset bulk upload file contains both layout and invalid data value or duplicates, you need to perform bulk upload twice to identify all the errors.

Sample error messages:

Error: The number of columns on the file does not match the layout expected.

Found errors in the file and upload process was cancelled.

- Invalid data: Equipment Number: 1HTSCNLR7MH367771 The 'PurchasePrice' field is invalid - The value 'abc' is invalid ;Equipment Number: 02CL10458 The 'ModelYear' field is invalid - The value '3_1' is invalid ;
- Duplicates: VIN number:193022;

Refer to User Manual [Here](#)

- If file is uploaded successfully, informational message will display as below example:

Process Completed.
Total Records: 3
Records Updated: 1
New Records: 1
Records Unchanged: 1

New records: any new equipment in bulk upload file will be counted as new record.
 Records updated: any changes under existing equipment # will be counted as updated record.

- **Tips for asset bulk upload through export file**

- Step 1: Export asset records
- Step 2: Open the file
- Step 3: Edit and add new records as necessary
- Step 4: Remove all other non-change records
- Step 5: Save the change into local file in csv

Warning: For the fields with numeric value, in Excel numbers with more than 12 characters will convert the number into scientific notation as below example.

	A	B	C	D	E
1	FISCalAss	Equipmen	AssetCate	ModelYea	VIN
2	N/A	96957	Ground	1991	9.6958E+16

To avoid scientific notation for numeric value, you can add ="xxxx" as below example.

	A	B	C	D	E	F	G	H	I	J	K	L	M	N	O
1	FISCalAss	EquipmentN	AssetCate	ModelYea	VIN	Make	Model	LicensePl	LicenseEP	AssetLoca	BillingCod	ColorMajc	AssetType	GVWRRan	GVWRAct
2	N/A	VAT1234	Ground	2016	12345678901234	TOYOTA	CAMRY	SC CA	PLATEVAT	94596	29000	WHITE	Auto-Mld	6,000 and	5000

Don't open the file after save. Excel will remove the leading 0. If you do open the file after save, please check the fields with numeric value, such as billing code and equipment number to add leading 0 as following screen shot.

	A	B	C	D	E	F	G	H	I	J	K
1	FISCAlAss	Equipmen	AssetCate	ModelYea	VIN	Make	Model	LicensePl	LicenseEP	AssetLoca	BillingCode
2	N/A	02CL10458	Ground	2001	111111111	CATERPILL	NPP40	CA	5252521	95827	029000

Step 6: Perform bulk upload

- **Highlights for FI\$Cal department bulk upload**
 - As FI\$Cal user, you can only update non-FI\$Cal fields through bulk upload.
 - When FI\$Cal user clicks on asset bulk upload, warning message will appear.

Asset Bulk Upload

New asset record or changes to existing asset's FI\$Cal fields cannot be processed through bulk upload. Please go to FI\$Cal for asset insert or FI\$Cal fields update.

Agency *

File *

- Exception rules for certain FI\$Cal fields are documented in FAMS Portal – Asset Data Source Priority Matrix in Appendix 3
- VIN decoded fields can't be updated through bulk upload for assets with decoded VIN

5.2 Usage

5.2.1 Usage Search

Navigation: Log in as department user → Fleet Management → Usage → Search

Usage Search

Agency * **Reporting Month/Year**

Equipment No **License Plate**

- Agency is required. Other fields help narrow down the search.
- Reporting Month/Year will be default to current reporting month/year
If you need to change the reporting month/year, please click anywhere in the box will populate month and year selection. Click on Done after your selection will update your reporting month/year.

Reporting Month/Year x

License Plate

Dec ▼ 2016 ▼

Today Done

- Click on 'Search' button after entering search criteria will perform search and return results in GVI

5.2.2 Usage Export

Usage Search

Agency * **Reporting Month/Year**

Equipment No **License Plate**

Search **Export**

- Enter search criteria
Agency is required field.
- Click on 'Export' button to export the search results into csv file
- Save the file to any location (local or network)

5.2.3 Usage Search Results

Return to Usage Search

Agency General Services, Department of
Reporting Month/Year December, 2015

Published	Data Warehouse	Meter Type	Equipment Num
✘	✘	Hours meter	80000001
✘	✘	Odometer	80001859
✔	✔	Odometer	80002542

- Click on ▼, open up the filter box for Published, Data Warehouse and Equipment Number
- Click on ↑ next to equipment #, sort the equipment # in descending or ascending order
- Error message icon ⓘ, use your mouse scroll over ⓘ will populate error message

- Published and Data Warehouse indicators are only available in web screen and will NOT be included in export file
- Disposed asset usage can be updated only during the period of time the asset was active
- Click on 'Return to Usage Search' link will open the Usage Search screen

Usage GVI Indicators Condition Matrix:			
Indicator	Condition	Icon	Tooltip (text displayed when user mouse rolls over icon)
Published	Usage update meets all the validation rules and ready to be inserted into data warehouse	✓	Yes
	Usage update does not meet all the validation rules and cannot be inserted into data warehouse	✗	No
Data Warehouse	Usage update is inserted into data warehouse after ETL run at 12:00am and 12:00pm and will be included in the reports	✓	Yes
	Usage update is not inserted into data warehouse and will not be included in the reports	✗	No

5.2.4 Usage Update

Publ...	Date Warehouse	Meter Type	Equipment Num	License	Acquisition In-Service Date	Disposition	Odom...	Hours	Days	Non-Fuel Operatin...	Deprecia...	Updated Info	Edit
✗	✗	Hours meter	80000001	100052	11/01/1978			0					Edit
✗	✗	Odometer	80001856	808574	08/01/1981	07/12/2017	0	0					Edit
✓	✓	Odometer	80002840	892402	04/01/1980	08/14/2016	88788	0	20	0	0	mason.bancroft@dge.sa... -2/24/2017 3:51:47 PM	Edit
✗	✗	Odometer	80002882	427558	07/01/1982	07/12/2017	0	0					Edit

Edit button is available within the asset active period (between acquisition in-service date and disposition date).

Click on Edit, open up Odometer, Hours, Days Used, Non Fuel Operating Cost, Depreciation for editing.

Publ...	Date Warehouse	Meter Type	Equipment Num	License	Acquisition In-Service Date	Disposition	Odom...	Hours	Days	Non-Fuel Operatin...	Deprecia...	Updated Info	Edit
✗	✗	Hours meter	80000001	100052	11/01/1978			0					Edit
✗	✗	Odometer	80001856	808574	08/01/1981	07/12/2017							Update Cancel

Equipment Num, License Plate, Disposition Date, Acquisition in-Service Date are not editable in the usage update screen

- Those fields can be edited through Asset GVI or through FI\$Cal

5.2.5 Equipment Usage History

Click on the equipment # will open up equipment usage history page to update usage record.

Equipment Usage History

[Return to Usage Search](#)
[Return to Search Results](#)

Agency	General Services, Department of	Make	GMC
Equipment	80002052	Model	SIERRA
Acquisition In-Service Date	7/1/1992	Model Year	1992
Disposition Date	7/12/2017		

Published	Date Warehouse	Meter Type	Reporting Month	Reporting Year	Odometer	Hours	Days Used	Non-Fuel Operating	Depreciation	Updated Info	Edit
		Odometer	7	2017							
		Odometer	6	2017	14890	0	30	0	0	mason.benson@gsa.ca.gov - 8/15/2017 10:38:22 AM	
		Odometer	5	2017							

- Usage history screen lists all the required reporting month/year to allow user to insert missing month usage data.
- Click on Edit, Odometer, Hours, Days Used, Non Fuel Operating Cost and Depreciation are open for editing.

Published	Date Warehouse	Meter Type	Reporting Month	Reporting Year	Odometer	Hours	Days Used	Non-Fuel Operating	Depreciation	Updated Info	Edit
		Odometer	7	2017	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>		
		Odometer	6	2017	14890	0	30	0	0	mason.benson@gsa.ca.gov - 8/15/2017 10:38:22 AM	

- Click on 'Update' button to save changes to database.
- Disposed asset usage can be updated only during the period of time the asset was active.

5.2.6 Usage Upload

Navigation: Log in as department user → Fleet Management → Usage → Upload

Bulk Usage Upload

Agency * General Services, Department of

File *

- Browse to location of file (local or network) and click save to perform bulk upload.
- **The file is required in csv format and follow the export template.**
 - Refer to Appendix 2 for usage data layout spec
- If the upload file contains invalid format or fails the following minimal validation rules, or duplicate equipment number, error message will display.
 - Equipment Number: Alphanumeric value plus dash, space, period and slash
 - Model Year: Must be a numeric value between 1900 and 2099
 - Reporting Year: Must be a numeric value between 1900 and 2099
 - Reporting Month: A value between 1 and 12
 - Odometer Reading: A numeric value
 - Hours Meter Reading: A numeric value
 - Days Used: A numeric value

- Non Fuel Operating Cost: A numeric value
- Depreciation: A numeric value

Bulk upload file error message follows 2 step error sequence:

- Layout mismatch;
- Minimal data value validation & duplicate equipment number check

If usage bulk upload file contains both layout and invalid data value or duplicates, you need to perform bulk upload twice to identify all the errors.

Sample error messages:

Error: The number of columns on the file does not match the layout expected.

Found errors in the file and upload process was cancelled.

- Invalid data: Equipment Number: 123456789 The 'ModelYear' field is invalid - The value '2_1' is invalid ;Equipment Number: 96012498 The 'NonFuelOperatingCost' field is invalid - The value 'cde' is invalid ;Equipment Number: 96007391 The 'DaysUsed' field is invalid - The value 'abc' is invalid ;
- Duplicates: Equipment number:B3LE3-4UJ0179;

Refer to User Manual [Here](#)

- If file is uploaded successfully, informational message will display as below example:

Process Completed.
Total Records: 50
Records Updated: 1
New Records: 0
Records Unchanged: 49

New records: any new usage record in bulk upload file

Records updated: any changes under existing usage record in bulk upload file

- **Tips for usage bulk upload through export file**

Step 1: Export usage records

Step 2: Open the file

Step 3: Edit records as necessary

Warning: following fields data is extracted from asset record and should not be edited in bulk upload file.

EquipmentNum VIN ModelYear Make Model LicenseEPlateNum

Step 4: Remove all other records that do not need to be changed

Step 5: Save the change into local file in csv

Warning: For the fields with numeric value, from 12th character excel will convert the number into scientific notation as below example.

EquipmentNum	VIN	ModelYear	Make	Model	LicenseEPlateNum	Reporting	Reporting	Odometer	HoursMet	DaysUsed	NonFuelC	Depreciation
9600739b	9.6958E+20	1996	Cushman	320 MINU	N/A	2015	12	300	0	1	0	0

To avoid scientific notation for numeric value, you can add ="xxxx" as below example.

EquipmentNum	VIN	ModelYear	Make	Model	LicenseEPlateNum	Reporting	Reporting	Odometer	HoursMet	DaysUsed	NonFuelC	Depreciation
0123456789012345678	9695798888888888000000	1996	Cushman	320 MINU	N/A	2015	12	300	0	1	0	0

Don't open the file after save. Excel will remove the leading 0. If you do open the file after save, please check the fields with numeric value, such as equipment number to add leading 0 as following screen shot.

EquipmentNum	VIN	ModelYear	Make	Model	LicenseEPlateNum	Reporting	Reporting	Odometer	HoursMet	DaysUsed	NonFuelC	Depreciation
0123456789012345678	9695798888888888000000	1996	Cushman	320 MINU	N/A	2015	12	300	0	1	0	0

Step 6: Perform bulk upload

5.2.7 Usage Update Tips

- Leverage bulk upload to clean usage data based on FAMS Web Portal - Data Entry Validation Matrix in Appendix 1
- Utilize usage history screen to view inconsistent usage records with error indicator
 - Multiple usage records update might be required to fix one specific record
 - Start from first error record and update upwards in usage history screen
- Web screen usage update case study

Below example shows 9/2008 usage record is published because the data value is valid comparing to 8/2008 and 10/2008 based on data entry validation matrix. However, in order to fix 8/2008 data, it is necessary to edit 9/2008 data to be consistent with previous usage records instead of previous month record.

Published	Data Warehouse	Meter Type	Reporting Month	Reporting Year	Odometer	Hours	Days Used	Non-Fuel Operating Cost	Depreciation
✖	✔	Odometer	10	2008	82977	0	32	0	0
✔	✔	Odometer	8	2008	0	0	0	0	0
✖	✔	Odometer	8	2008	0	0	0	0	0
✖	✔	Odometer	7	2008	82376	0	32	0	0

Bulk upload process should be used for below example with multiple records update.

Published	Data Warehouse	Meter Type	Reporting Month	Reporting Year	Odometer	Hours	Days Used	Non-Fuel Operating Cost	Depreciation
✖	✖	Odometer	7	2012	81850	0	0	0	0
✖	✖	Odometer	8	2012	81511	0	0	0	0
✖	✖	Odometer	5	2012	81882	0	0	0	0
✖	✖	Odometer	4	2012	88525	0	0	0	0
✖	✖	Odometer	3	2012	88456	0	0	0	0
✖	✖	Odometer	2	2012	88364	0	0	0	0
✖	✖	Odometer	1	2012	88554	0	0	0	0
✖	✖	Odometer	12	2011	79020	0	20	0	0
✖	✖	Odometer	11	2011	79661	0	0	0	0
✖	✖	Odometer	10	2011	79459	0	0	0	0
✖	✖	Odometer	8	2011	79358	0	0	485	0

5.3 Agency Fuel

5.3.1 Fuel Search

Navigation: Log in as department user → Fleet Management → Fuel → Search

Agency Fuel Management

Agency Fuel Search

The screenshot shows a search form with the following fields and buttons:

- Agency ***: Text input field containing "General Services, Department of".
- Equipment No**: Text input field containing "Equipment Number".
- Transaction Date ***: Two date picker fields. The first contains "12/1/2017" and the second contains "12/31/2017".
- Buttons**: "Search" and "Export" buttons. The "Search" button is highlighted with a red box.

- Agency and transaction date are required. Equipment No help narrow down the search.
- Click on 'Search' button after entering search criteria will perform search and return results in GVI.
- Fuel search will only display agency bulk fuel in GVI.

5.3.2 Fuel Export

Agency Fuel Management

Agency Fuel Search

The screenshot shows the same search form as above, but with the "Export" button highlighted with a red box.

- Enter search criteria
- Click on 'Export' button to export the search results into csv file
- Save the file to any location (local or network)

5.3.3 Fuel Search Results

Fleet Fuel Management

Susan Bang@q

Fuel Search Results

[Return to Fuel Search](#)

Agency: General Services, Department of

Published	Data Warehouse	Equipment Num.	Transaction Date	Transaction ID	Fuel Station Agency	Fuel Station	Fuel Type	Fuel Quantity	Units	Total Fuel Cost	Odometer Reading	Hour Mile Reading	Edit
		80014387	02/21/2017	0012017022100002	General Services, Department of	D08-001	888	18	IML	#1	12889	0	
		80012900	02/19/2017	00120170219100007	General Services, Department of	D08-001	0A5	11	0AL	25	7863	0	

- Click on , open up the filter box for Published, Data Warehouse, Transaction Date, and Fuel Type
- Error message icon , use your mouse scroll over will populate error message
- Published and Data Warehouse indicators are only available in web screen and will NOT be included in export file
- Click on 'Return to Fuel Search' link will open the Usage Search screen

Fuel GVI Indicators Condition Matrix:			
Indicator	Condition	Icon	Tooltip (text displayed when user mouse rolls over icon)
Published	Fuel update meets all the validation rules and ready to be inserted into data warehouse		Yes
	Fuel update does not meet all the validation rules and cannot be inserted into data warehouse		No
Data Warehouse	Fuel update is inserted into data warehouse after ETL run at 12:00am and 12:00pm and will be included in the reports		Yes
	Fuel update is not inserted into data warehouse and will not be included in the reports		No

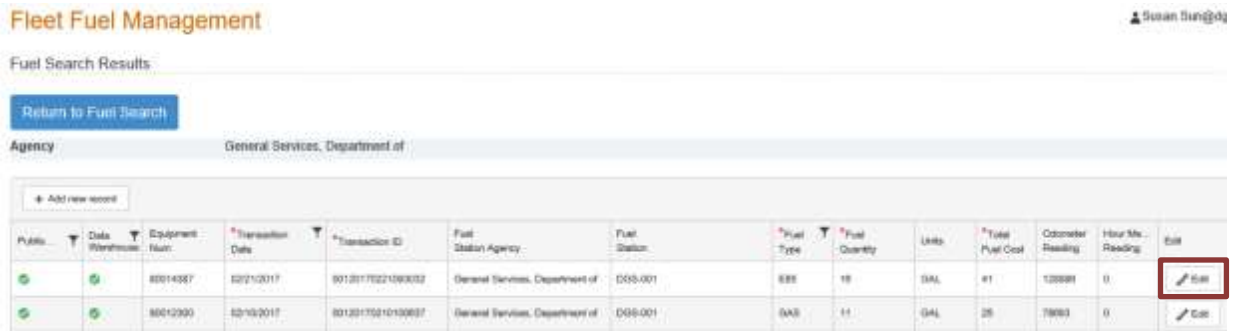
5.3.4 Fuel Insert

Published	Data Warehouse	Equipment Num.	Transaction Date	Transaction ID	Fuel Station Agency	Fuel Station	Fuel Type	Fuel Quantity	Units	Total Fuel Cost	Odometer Reading	Hour Mile Reading	Edit
		<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	Please select	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="button" value="Update"/> <input type="button" value="Cancel"/>

- Click on 'Add new record' button and new row is added to top for new fuel record data entry
- Required fields are labeled with *

5.3.5 Fuel Update

- Click the **edit** on existing record, all fields open up for edit



- Click on **update** to save the change.
- Click on **cancel** to discard the change



5.3.6 Fuel Upload

Navigation: Log in as department user → Fleet Management → Fuel → Bulk Upload



- Browse to location of file (local or network) and click save to perform bulk upload
- **The file is required in csv format and follow the export template**
 - Refer to Appendix 2 for agency fuel data layout spec
- If the upload file contains invalid format or fails following minimal validation rules, or duplicate transaction ID, error message will display.
 - Equipment Number: Alphanumeric value plus dash, space, period and slash
 - Transaction Date: A valid date (mm/dd/yyyy)
 - Fuel Quantity: A numeric value
 - Total Fuel Cost: A numeric value
 - Odometer Reading: A numeric value
 - Hours Meter Reading: A numeric value

Bulk upload file error message follows 2 steps error sequence:

- Layout mismatch;
- Minimal data value validation & duplicate transaction ID check

If Fuel bulk upload file contains both layout and invalid data value or duplicates, you need to perform bulk upload twice to identify all the errors.

Sample error messages:

Error: The number of columns on the file does not match the layout expected.

Found errors in the file and upload process was cancelled.

- Invalid data: Transaction ID: 00120170201174349 The 'TotalFuelCost' field is invalid - The value 'abc' is invalid ;Transaction ID: 00120170201153645 The 'TransactionDate' field is invalid - The value '3_1' is invalid ;
- Duplicates: Transaction ID:00120170201153645;

Refer to User Manual [Here](#)

- If file is uploaded successfully, informational message will display as below example:

Process Completed.
Total Records: 50
Records Updated: 1
New Records: 0
Records Unchanged: 49

New records: any new transaction ID in bulk upload file

Records updated: any changes under existing transaction ID

- **Tips for fuel bulk upload through export file**

Step 1: Export fuel records

Step 2: Open the file

Step 3: Edit records as necessary

Step 4: Remove all other non-change records

Step 5: Save the change into local file in csv

File name:

Save as type:

Warning: For the fields with numeric value, from 12th character excel will convert the number into scientific notation as below example.

	A	B	C	D	E	F	G	H	I	J
1	Equipmer	Transaction	TransactionID	FuelStationAgencyAbbr	FuelStation	FuelType	FuelQuantity	TotalFuelCost	OdometerReading	HoursMeterReading
2	80014330	7/31/2017	1.23457E+12	DGS	DGS-001	GAS	3	8	1780	0

To avoid scientific notation for numeric value, you can add ="xxxx" as below example.

	A	B	C	D	E	F	G	H	I	J
1	Equipmer	Transaction	TransactionID	FuelStationAgencyAbbr	FuelStation	FuelType	FuelQuantity	TotalFuelCost	OdometerReading	HoursMeterReading
2	80014330	7/31/2017	"1234567890123"	DGS	DGS-001	GAS	3	8	1780	0

Don't open the file after save. Excel will remove the leading 0. If you do open the file after save, please check the fields with numeric value, such as transaction ID to add leading 0 as following screen shot.

	A	B	C	D	E	F	G	H	I	J
1	Equipment	Transaction	TransactionID	FuelStationAgencyAbbr	FuelStation	FuelType	FuelQuantity	TotalFuelCost	OdometerReading	HoursMeterReading
2	80016760	7/31/2017	00120170731084804	DGS	DGS-001	GAS	8	19	13500	0

Step 6: Perform bulk upload

6 Reports

These reports allow agencies to access reports for their agency data. Required fields are labeled with *

6.1 Report Criteria Screen

Report Criteria

Master Vehicle Data Gap Report

All fields are required

Agency *

Start Date *

End Date *

6.2 Report result page

All fields are required

Agency *

Start Date *






End Date *

1 of 8 Find 1 Next

Master Asset Data Gap Report

Period chosen: 8/1/2016 to 7/31/2017

Agency	Reporting Year	Agency Billing Code	Equipment Num	VIN	License E Plate Num
General Services, Department of					
	2001	030501	90006195	1FTSX30L31EC92568	1039232
	2001	30101	90009177	1GKDM19W*1*****	419718
	2002	030090	90010541	CK-00339	N/A
	2002	030320	90004522	3B7KC26W4XM591058	1024574
	2002	030501	90011549	1FDXW46552EC81596	1127901
	2002	030501	90015131	1FTNF20L12ED13946	1118635

- Click on  to view the next page or click on  to view the previous page
- Click on  to view the last page or click on  to view the first page
- Click on the arrow icon  to export the report to excel

7 Documentation

7.1 Bulk Upload Template

Asset, Usage and Fuel Bulk Upload CSV file template. For more information on the bulk upload file specification, refer to appendix 2.

7.2 User Manual

Link to this job aid.

8 Support

Click Contact Us, will generate outlook email to FamsSupport@dgs.ca.gov.

9 Appendix 1: FAMS 3.0 Web Portal Data Entry Validation Matrix



FAMS 3 0 Data
Entry Validation Mai

10 Appendix 2: Asset, Usage and Fuel Data File Layout Specifications



FAMS Portal - Asset
Data File Layout Spe



FAMS Portal - Asset
Usage Data File Layr



FAMS Portal -
Agency Fuel Data Fil

11 Appendix 3: FAMS Portal- Asset Data Source Priority Matrix



FAMS Portal - Asset
Data Source Prioritiz