DFA Arkansas Department of Finance and Administration

# OFFICE OF ADMINISTRATIVE SERVICES

# State Agency Vehicle Application (SAVA) User Guide

June 2019

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Changes are periodically made to this document. Changes, technical inaccuracies and typographic errors will be corrected in subsequent editions.

This document was created using Microsoft Office 365 software. The typeface is Arial.

# Document Revision History

| Version | Description | Date | Contributors |
|---|---|---|---|
| 1.0 | Initial release | June 2019 | Office of Administrative Services (OAS), Office of Information Services (OIS) |
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# Table of Contents

# 1 Document Overview

This document describes the SAVA web-based user interface as well as the processes and procedures for managing an agency's fleet of vehicles.

## Scope

This document covers the following information:

- Managing fleet vehicle inventory (including adding vehicle details)
- Viewing modifying priority request lists
- Viewing and creating vehicle requests
- Managing agency and user accounts
- Bulk uploading of monthly reporting data
- Generating reports

## Target Audience

This document is intended for individuals in the following roles:

- Managers/Supervisors
- Agency personnel responsible for managing fleet vehicles
- Fleet Administrator

## Typographical Conventions

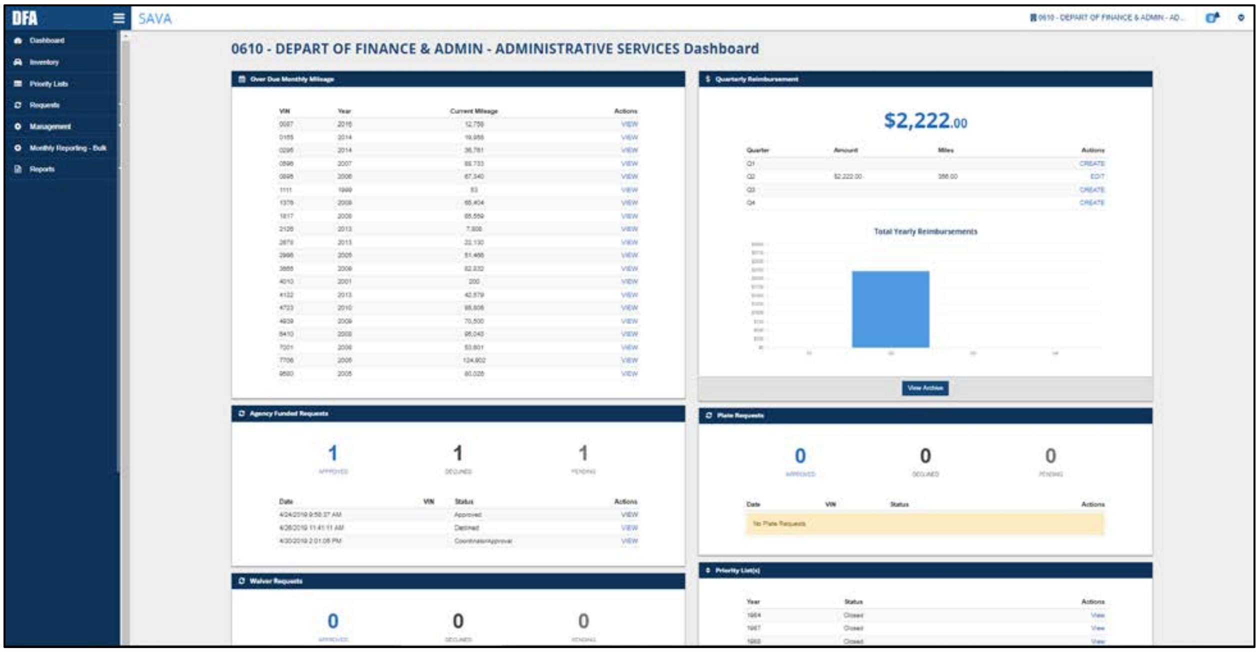
This document uses the following typographical conventions:

- Bold – Keyboard keys, buttons, menu options, hyperlinks and list items are shown in bold (for example, click the **Create** hyperlink, or click **Vehicle Details**)
- Italics – Field names and procedure titles are shown italicized (for example, enter the vehicle's full vehicle identification number in the *VIN* field or See *Monthly Reporting - Bulk*)
- Underline – Sections of an application window are shown underlined (for example, locate the <u>Quarterly Reimbursements</u> section
- Select – The act of picking an item from a list or choice of options (for example, from the *Fuel Type* drop-down list, select the appropriate option)
- Notes – Additional information to help you perform a task or better understand it

# 2 SAVA User Interface Overview

## 2.1 Dashboard

When you log in to SAVA, a “dashboard” displays providing an overview of work-related items for your agency’s vehicle fleet.

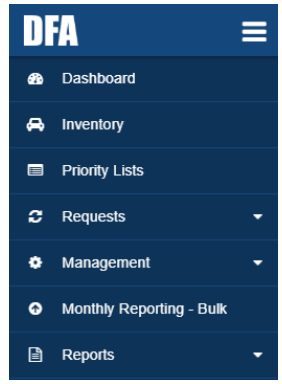



***SAVA Dashboard***

The dashboard contains the following six (6) task summary panels:

- Over Due Monthly Mileage
- Quarterly Reimbursements
- Agency Funded Requests
- Plate Requests
- Waiver Requests
- Priority Lists

## 2.2 Sidebar Menu




The sidebar panel on the left side of the window displays the menu of SAVA functions used to navigate the system and manage the vehicle fleet.

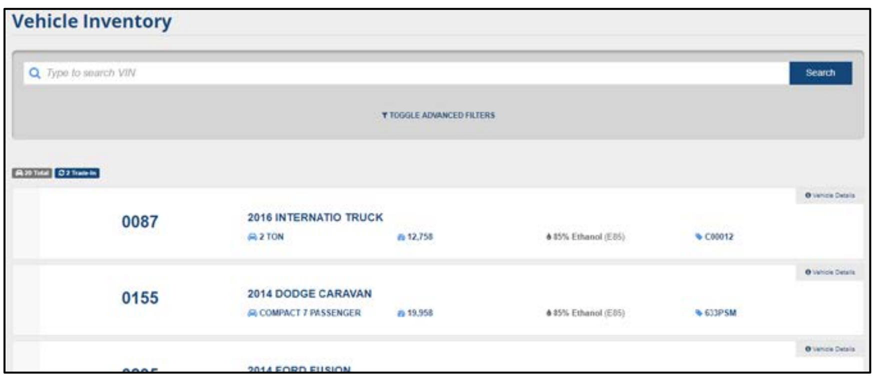
The sidebar menu has an auto-hide function that allows for additional workspace. Click the stack icon (at the top right of the sidebar panel) to toggle the auto-hide function. When enabled, move the mouse cursor anywhere outside the sidebar and it will minimize to only display the menu icons. Move the cursor to the sidebar to display the full menu.

### 2.2.1 Dashboard Menu Option

Click the **Dashboard** menu option to return to the dashboard from anywhere within the application.

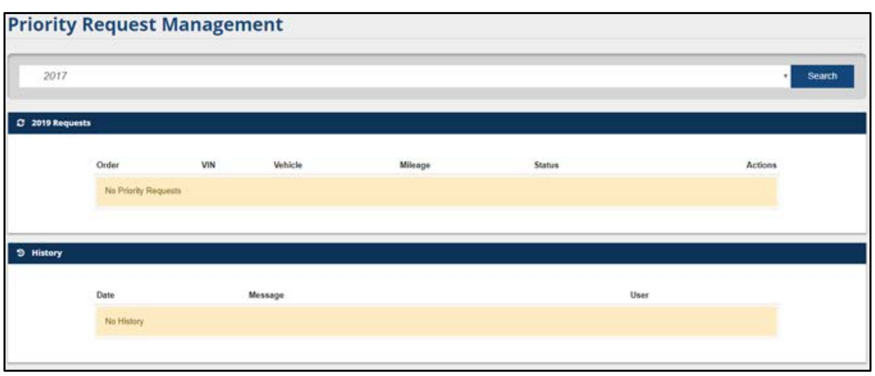
### 2.2.2 Inventory Menu Option

Click the **Inventory** menu option to display your agency's vehicle fleet inventory.




### 2.2.3 Priority Lists Menu Option

Click the **Priority Lists** menu option to display the Priority Request Management window.

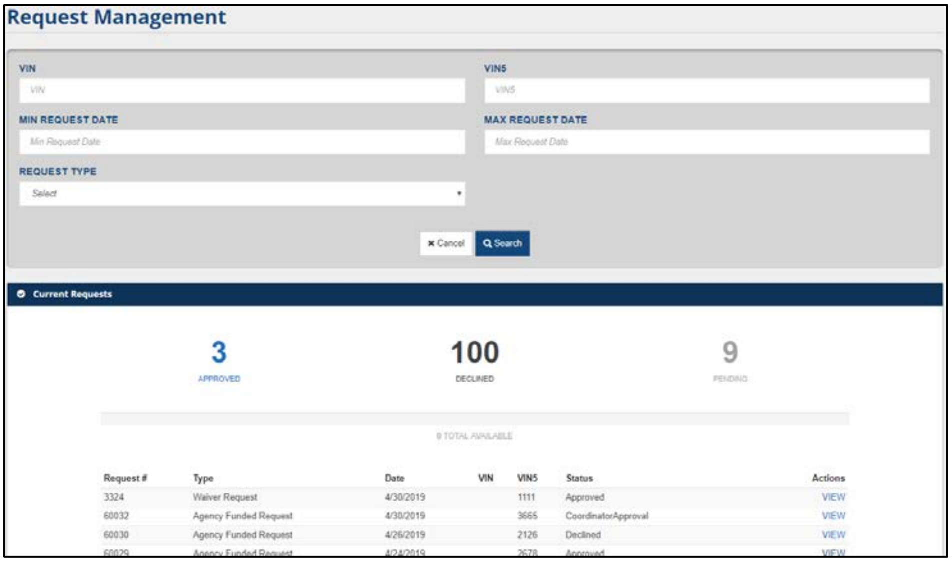


## 2.2.4 Requests Menu Option

Click the **Requests** menu option to display the View and Create Funded Request sub-menu items. The Requests function allows you to view all requests made (e.g., funded requests, waiver requests and plate requests) and displays a status for each request listed.

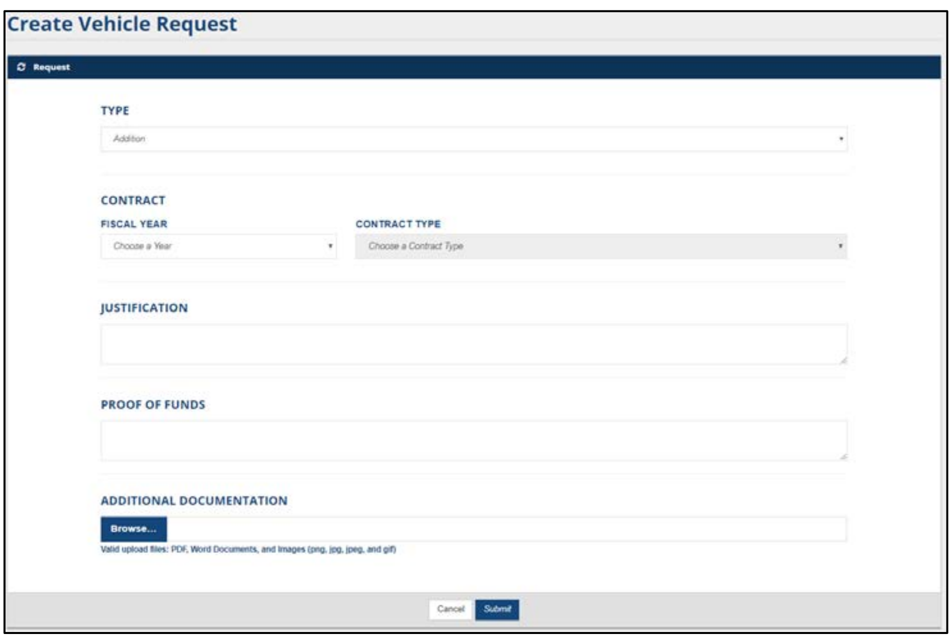
### View Requests

Click the **View** sub-menu item to display the Request Management window.




### Create Funded Request

Click the **Create Funded Request** sub-menu item to display the Create Vehicle Request window.

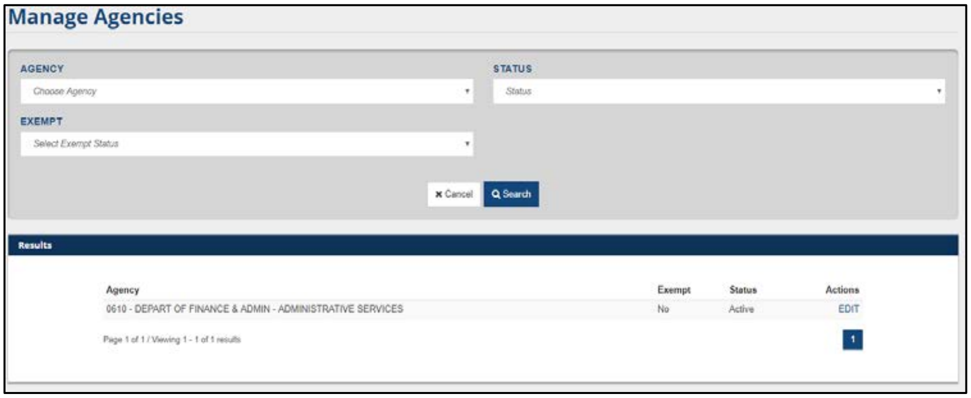


## 2.2.5 Management Menu Option

Click the **Management** menu option to display the Agency and User sub-menu items.

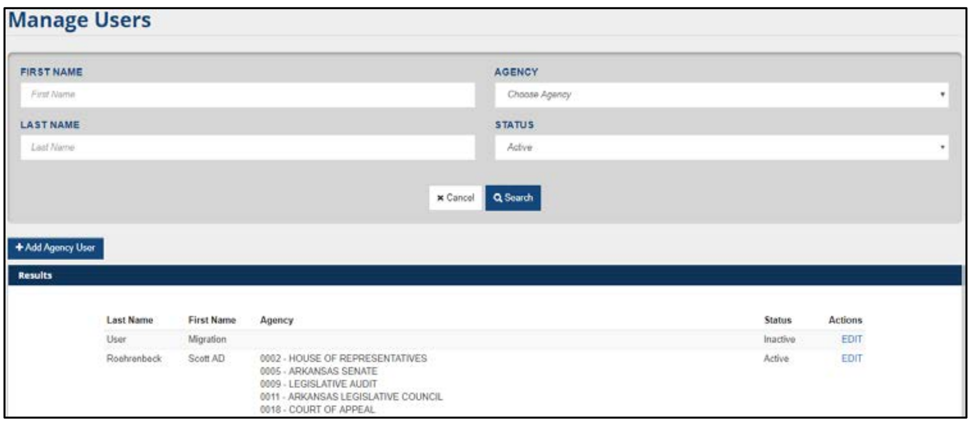
### Agency

Click the **Agency** sub-menu item to display the Manage Agencies window.



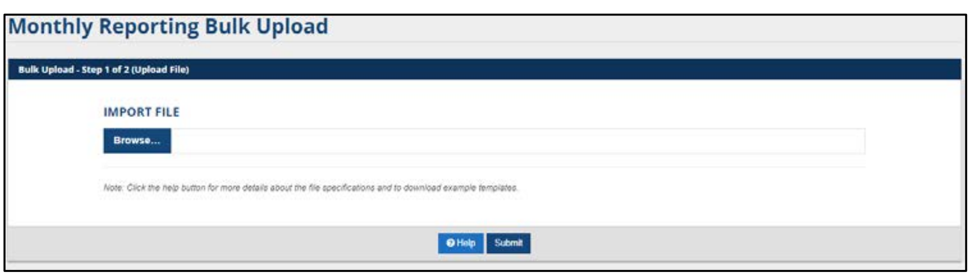

### User

Click the **User** sub-menu item to display the Manage Users window.




## 2.2.6 Monthly Reporting – Bulk Menu Option

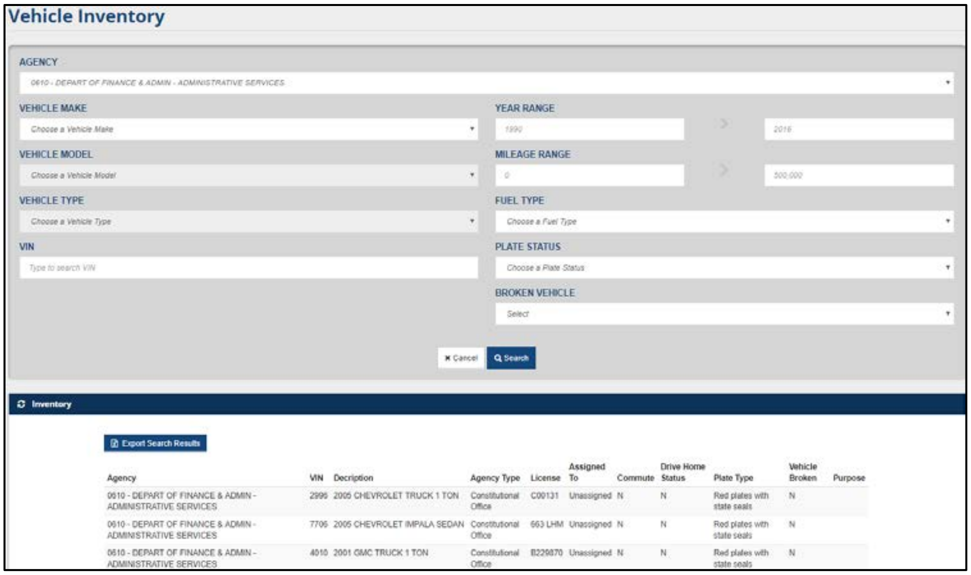
Click the **Monthly Reporting – Bulk** menu option to display Monthly Reporting Bulk Upload window.



## 2.2.7 Reports Menu Option

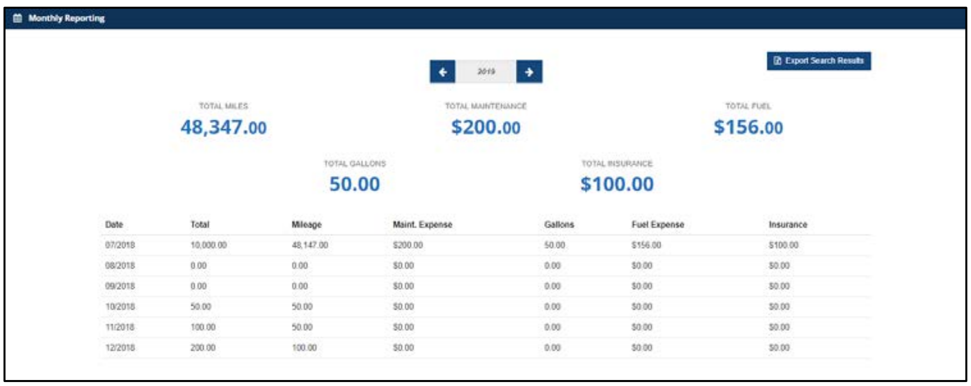
Click the **Reports** menu item to display the sub-menu options: Inventory, Monthly Reporting, Quarterly Reimbursements and M&R Within 30 Days.

### Inventory



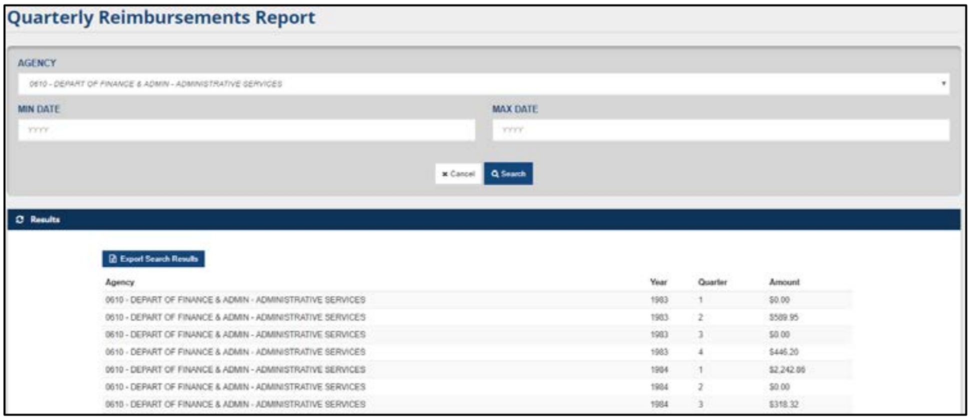

| Agency | VIN | Decription | Agency Type | License | Assigned To | Commute | Drive Home Status | Plate Type | Vehicle Broken | Purpose |
|---|---|---|---|---|---|---|---|---|---|---|
| 0610 - DEPART OF FINANCE & ADMIN - ADMINISTRATIVE SERVICES | 2996 | 2005 CHEVROLET TRUCK 1 TON | Constitutional Office | C00131 | Unassigned | N | N | Red plates with state seals | N | |
| 0610 - DEPART OF FINANCE & ADMIN - ADMINISTRATIVE SERVICES | 7706 | 2005 CHEVROLET IMPALA SEDAN | Constitutional Office | 663 LHM | Unassigned | N | N | Red plates with state seals | N | |
| 0610 - DEPART OF FINANCE & ADMIN - ADMINISTRATIVE SERVICES | 4010 | 2001 GMC TRUCK 1 TON | Constitutional Office | B229870 | Unassigned | N | N | Red plates with state seals | N | |

### Monthly Reporting



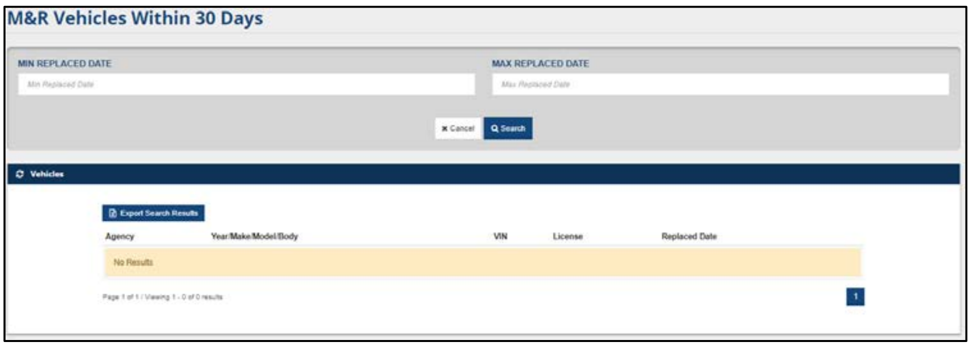

| Date | Total | Mileage | Maint. Expense | Gallons | Fuel Expense | Insurance |
|---|---|---|---|---|---|---|
| 07/2018 | 10,000.00 | 48,147.00 | $200.00 | 50.00 | $156.00 | $100.00 |
| 08/2018 | 0.00 | 0.00 | $0.00 | 0.00 | $0.00 | $0.00 |
| 09/2018 | 0.00 | 0.00 | $0.00 | 0.00 | $0.00 | $0.00 |
| 10/2018 | 50.00 | 50.00 | $0.00 | 0.00 | $0.00 | $0.00 |
| 11/2018 | 100.00 | 50.00 | $0.00 | 0.00 | $0.00 | $0.00 |
| 12/2018 | 200.00 | 100.00 | $0.00 | 0.00 | $0.00 | $0.00 |

## Quarterly Reimbursements




| Agency | Year | Quarter | Amount |
|---|---|---|---|
| 0610 - DEPART OF FINANCE & ADMIN - ADMINISTRATIVE SERVICES | 1983 | 1 | $0.00 |
| 0610 - DEPART OF FINANCE & ADMIN - ADMINISTRATIVE SERVICES | 1983 | 2 | $589.95 |
| 0610 - DEPART OF FINANCE & ADMIN - ADMINISTRATIVE SERVICES | 1983 | 3 | $0.00 |
| 0610 - DEPART OF FINANCE & ADMIN - ADMINISTRATIVE SERVICES | 1983 | 4 | $446.20 |
| 0610 - DEPART OF FINANCE & ADMIN - ADMINISTRATIVE SERVICES | 1984 | 1 | $2,242.86 |
| 0610 - DEPART OF FINANCE & ADMIN - ADMINISTRATIVE SERVICES | 1984 | 2 | $0.00 |
| 0610 - DEPART OF FINANCE & ADMIN - ADMINISTRATIVE SERVICES | 1984 | 3 | $318.32 |

## M&R Within 30 Days




| Agency | Year/Make/Model/Body | VIN | License | Replaced Date |
|---|---|---|---|---|
| No Results | | | | |

Page 1 of 1 / Viewing 1 - 0 of 0 results

# 3 SAVA Processes and Procedures

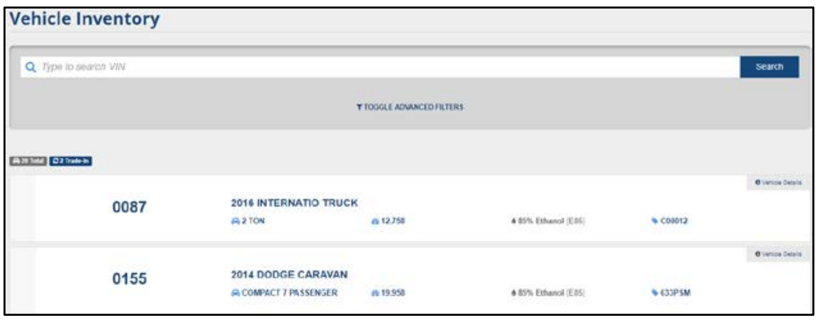
## 3.1 Managing Reports

### 3.1.1 Monthly Reports

Use this procedure to record monthly report data for an individual fleet vehicle.

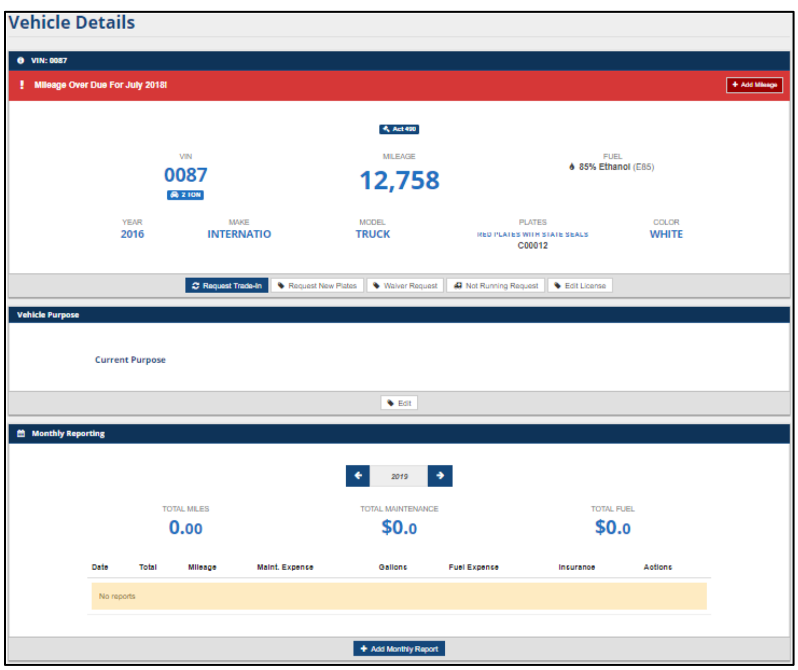
**Note:** Reporting data for multiple vehicles can be uploaded to the system using a single file. For more information, refer to *Monthly Reporting – Bulk Upload* later in this document.

1. From the sidebar menu, click **Inventory**. The Vehicle Inventory window displays.



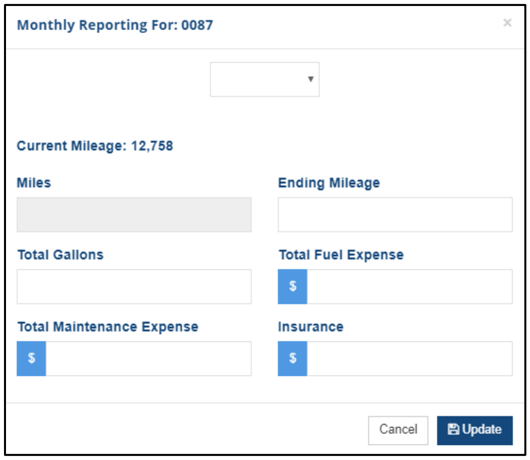

***Vehicle Inventory Window***

2. Click **Vehicle Details** (in the upper right corner of the vehicle summary box) for the desired vehicle. The Vehicle Details window displays.




***Vehicle Details Window***

3. In the Monthly Reporting section, click **Add Monthly Report**. The Monthly Reporting pop-up window displays.



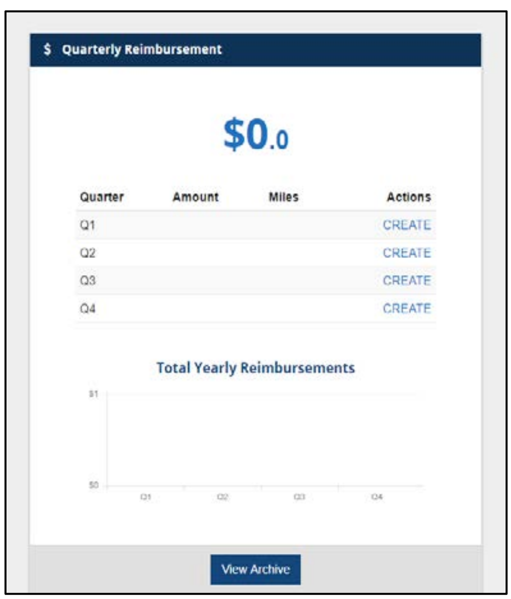

***Monthly Reporting Data Entry Pop-Up Window***

4. From the drop-down list (at the top), select the *month/year*.
5. Enter the data in the appropriate fields, and enter a zero “0” in the remaining fields (for which there is no data).
6. Click **Update**. A confirmation message displays at the bottom of the page (on the left).
7. As required, repeat Steps 1 through 6 for other fleet vehicles.

## 3.1.2 Quarterly Reports

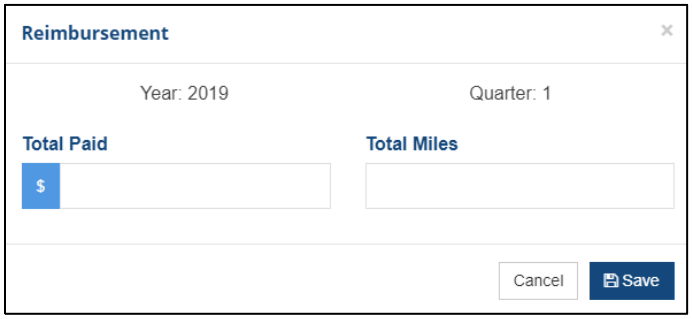
Use this procedure to enter quarterly report data.

1. From the Dashboard, locate the Quarterly Reimbursement section.




***Quarterly Reimbursement Section (of Dashboard)***

2. Click the **Create** hyperlink next to the quarter you want to create. The Reimbursement window displays.



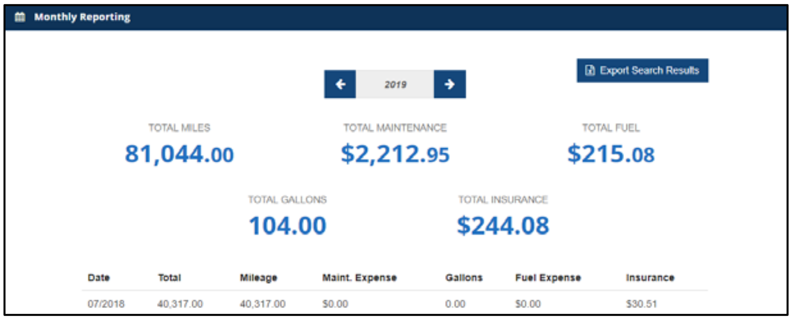

***Reimbursement Window***

3. Enter data for that quarter, and then click **Save**. A confirmation message displays at the bottom of the page (on the left).

### 3.1.3 Exporting Reports

Use this procedure to export report data to an Excel spreadsheet.

1. From the sidebar menu, click **Reports**, and then the click the menu option for the report you want to export (for example, the Monthly Report shown below).




***Exporting Reports (Monthly Report shown)***

2. Click **Export Search Results**. An Excel file is automatically downloaded to your computer.

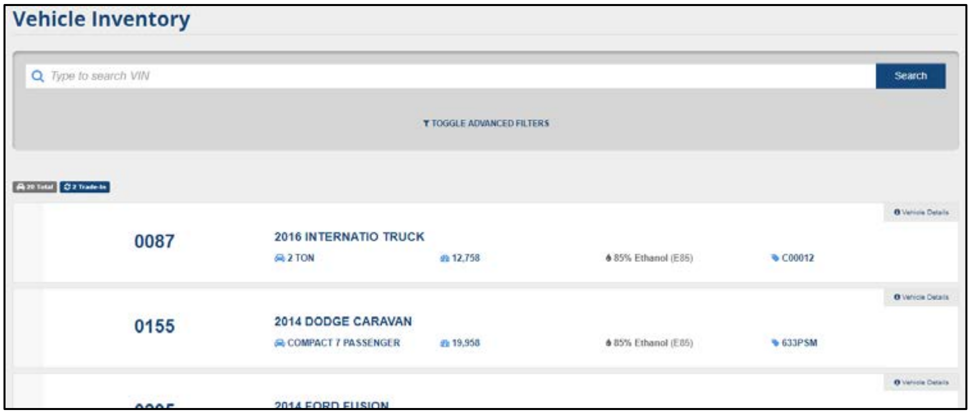
**Note:** The downloaded file displays at bottom of the browser window.

3. Click the file name to open the report.
4. Repeat the above steps for any of the other available reports (Inventory, Quarterly Reimbursements and M&R within 30 days).

## 3.2 Searching Inventory

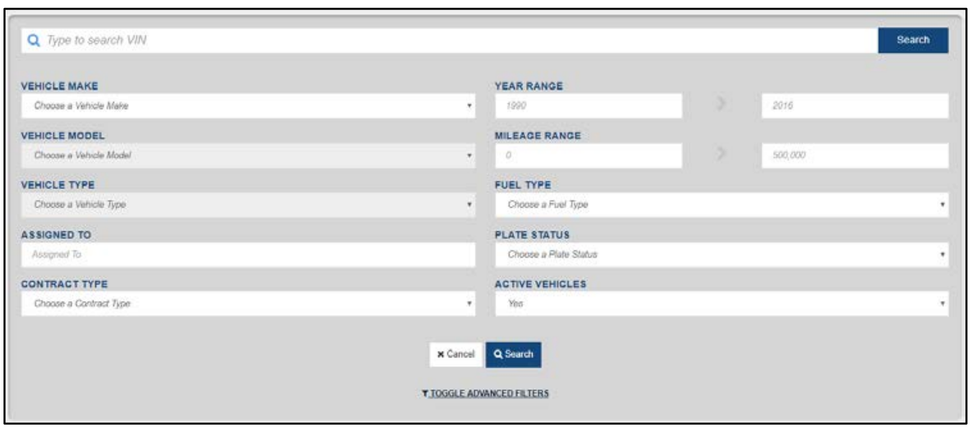
Use the procedure to search the fleet vehicle inventory

1. From the sidebar menu, click **Inventory**. The Vehicle Inventory window displays (sorted in ascending order by the last four digits of the VIN).




***Vehicle Inventory Window***

2. As needed, click the **Toggle Advanced Filter** hyperlink to search for a vehicle. The advanced search window displays.




***Advanced Vehicle Inventory Search***

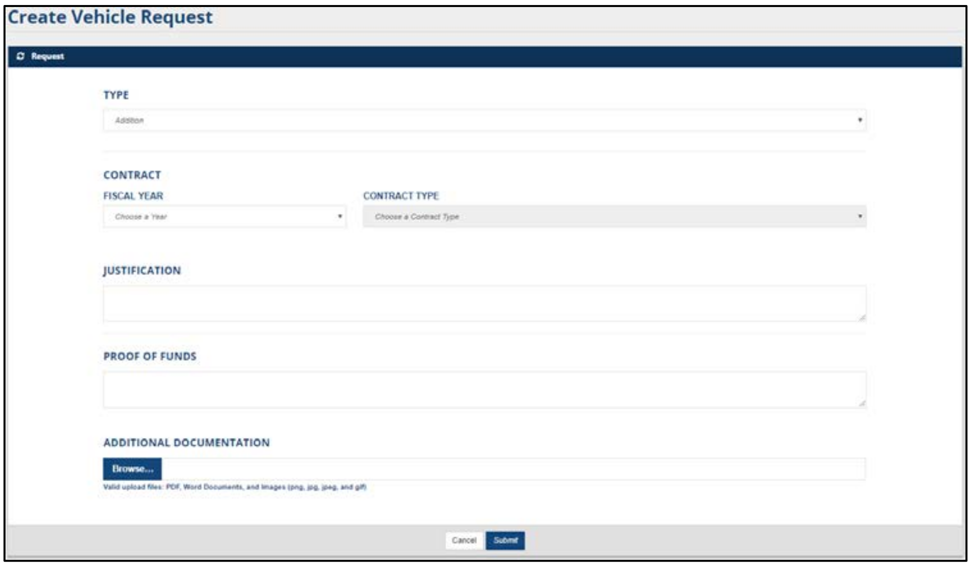
3. Select and/or enter the desired search criteria, and then click **Search**. Vehicles matching the search criteria display in a list (sorted in ascending order by the last four digits of the VIN).

## 3.3 Completing a Vehicle Request

A vehicle request (addition or replacement) is a two-step process; create the request and print the signature document, and scan then upload the signed request for Fleet Administrator approval/denial.

### 3.3.1 Step 1: Creating a Funded Request

1. From the sidebar menu, click **Requests**, and then click **Create Funded Request**. The Create Vehicle Request window displays.



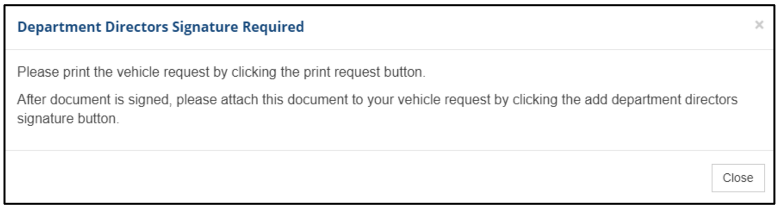

***Create Vehicle Request Window***

2. Select the type of request from the *Type* drop-down list.

| If… | Then… |
|---|---|
| **Replacement** is selected, | Select the vehicle to be replaced from the *Vehicle* drop-down list. |

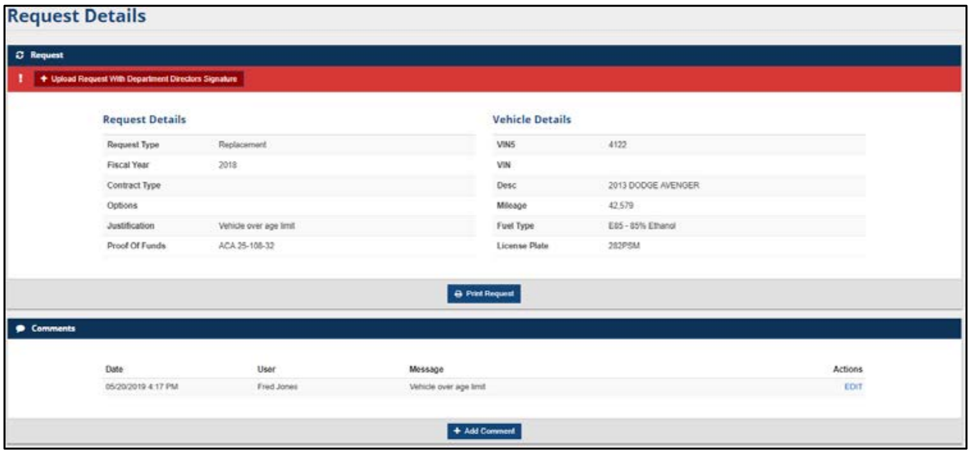
3. In the Contract section, select the *Fiscal Year* and *Contract Type* from the drop-down lists.
4. In the *Justification* field, enter an explanation.
5. In the *Proof of Funds* field, enter details regarding the funds to be used.
6. In the Additional Documentation section, add any supplemental information by clicking **Browse…**, and then navigating to and opening the file to attach to the record.

7. Click **Submit**. A pop-up message displays.




***Signature Reminder Pop-up Window***

8. Click **Close**. The Request Details window displays.




***Request Details Window (for completed request)***

9. In the Request section, click **Print Request**. A PDF file of the request is automatically downloaded to your computer.

**Note:** The downloaded file displays at bottom of screen.

10. Click the file name to open the request, and then print it.

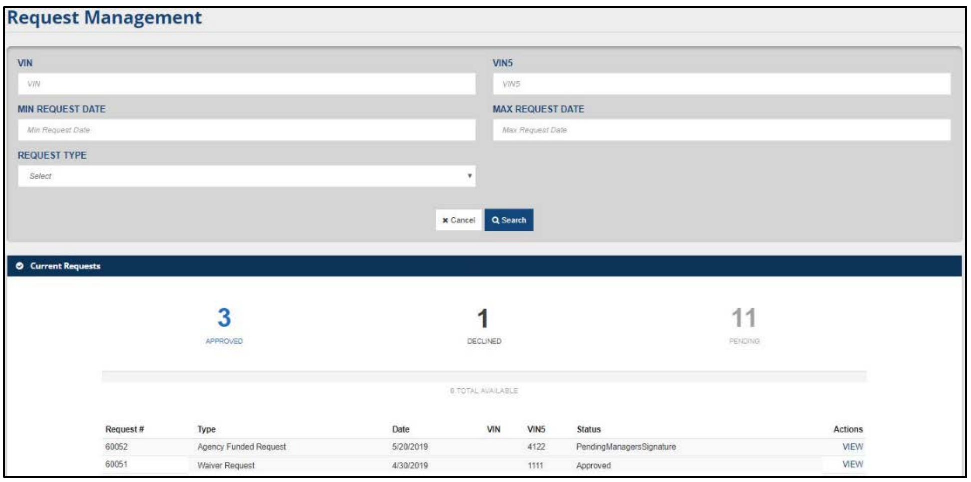
### 3.3.2 Step 2: Uploading the Signed Request

Before uploading the request, it must be signed by your department Director and then electronically scanned.

**Note:** The DFA Fleet Administrator will not receive the vehicle request until the signed request document has been uploaded.

1. From the sidebar menu, click **Request**, and then **View**. The Request Management window displays.

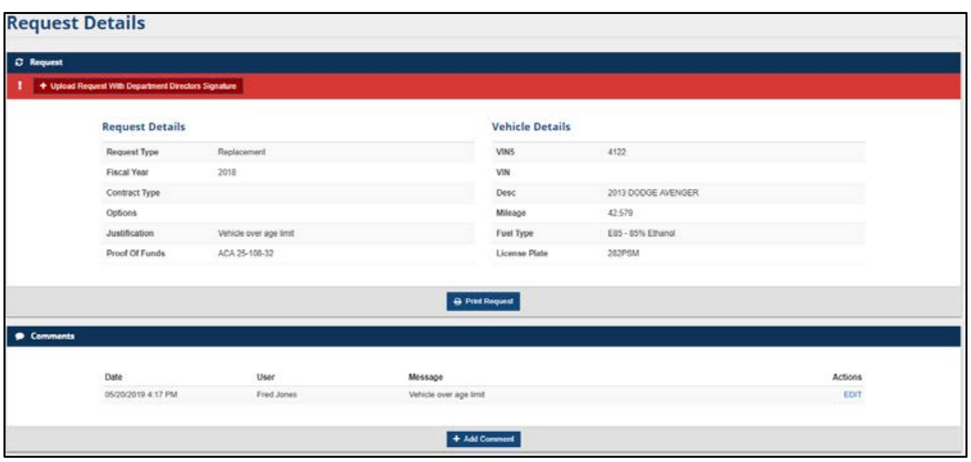
**Note:** Requests may also be accessed from the Agency Funded Requests panel on the Dashboard.




***Request Management Window***

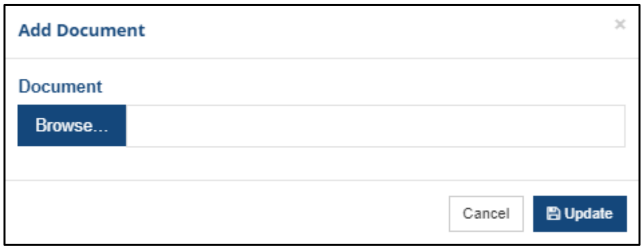
**Note:** As necessary, use the search function at the top to filter the list of requests displayed.

2. Click the **View** hyperlink (in the *Actions* column) next to the desired request, and then **Close** on the Department Directors Signature Required pop-up window. The Request Details page displays.




***Request Details Window***

3. Click **Upload Request with Department Director's Signature**. The Add Document pop-up window displays.




***Add Document Pop-Up Window***

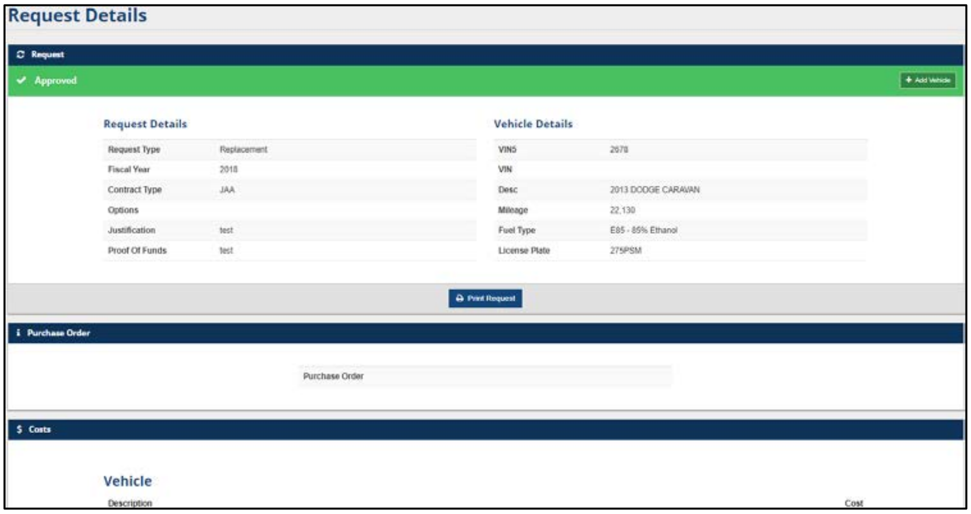
4. Click **Browse…**, navigate the signature document, and then click **Open**. The document title displays in the *Document* field.
5. Click **Update** to upload and attach the document to the record.

After the Fleet Administrator reviews the request, you will receive an email notifying you whether it has been approved or denied.

## 3.4 Adding a Vehicle to Inventory

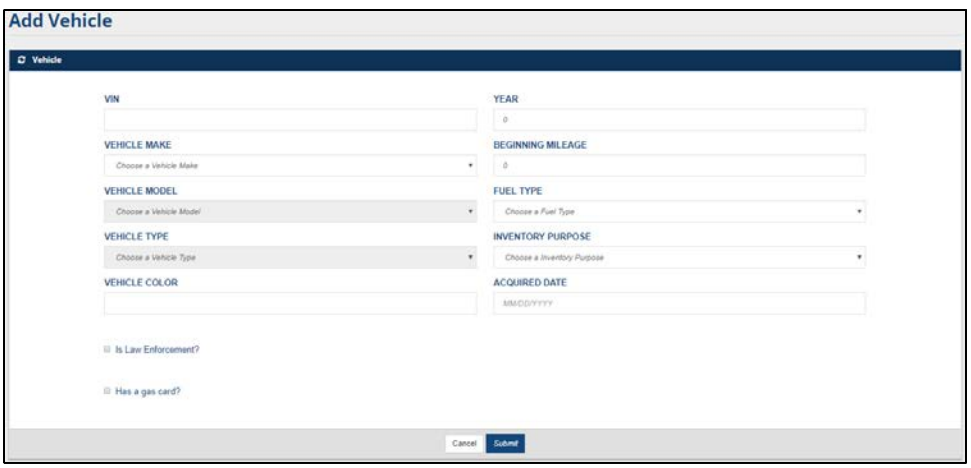
Use this procedure once the requested vehicle has been received.

1. From the sidebar menu, click **Request**, and then **View**.
2. Click the **View** hyperlink (in the *Actions* column) next to the approved request. The Request Details window displays.




***Approved Request Details Window***

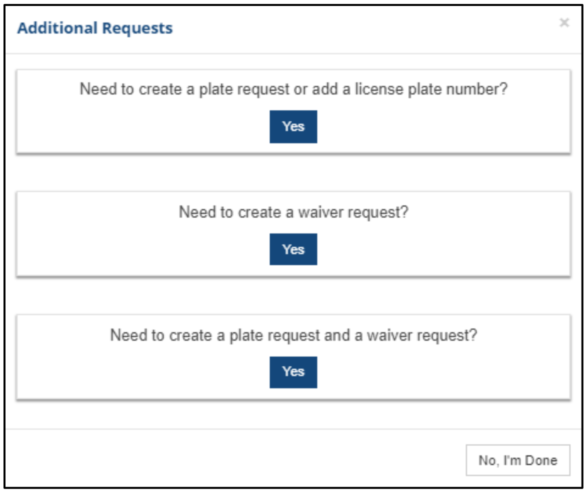
3. Click **Add Vehicle** (in the upper right). The Add Vehicle window displays.




***Add Vehicle Window***

4. In the *VIN* field, enter the the full vehicle identification number.

5. Enter the remaining vehicle information in the appropriate fields, and then click **Submit**. The Additional Requests pop-up window displays.



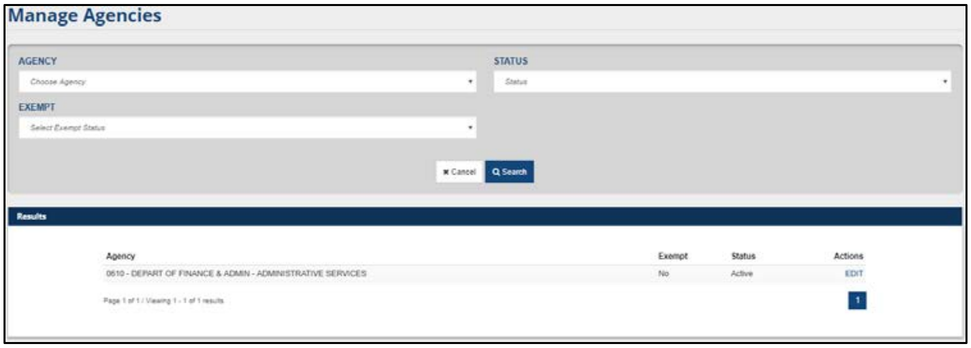

***Additional Requests Pop-Up Window***

| If… | Then… |
|---|---|
| You need to create a plate request, add a license plate number, create a waiver request or both, | Click **Yes** in the appropriate box, and then enter the required information in the window that displays. |
| No additional requests are needed for the new vehicle, | Click **No, I'm Done**. |

## 3.5 Managing Agencies

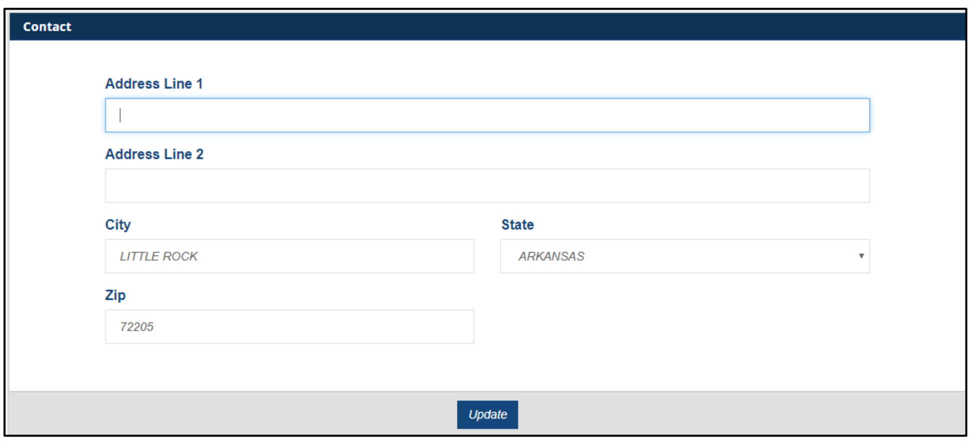
Use this procedure to update agency information.

1. From the sidebar menu, click **Management**, and then **Agency**. The Manage Agencies window displays.




***Manage Agencies Window***

2. In the Results section (at the bottom of the page), click the **Edit** hyperlink (in the *Actions* column). The Contact window displays.

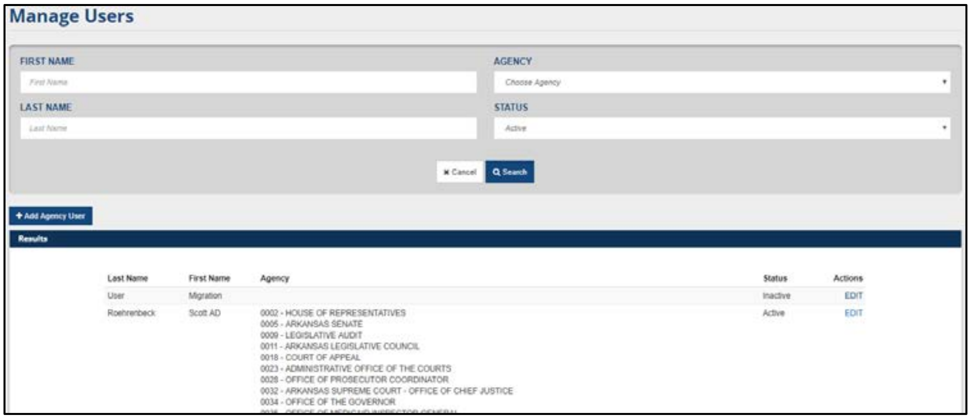



***Agency Contact Window***

# 3.6 Managing Users

Use this procedure to add users and inactivate users in your agency.

1. From the sidebar menu, click **Management**, and then **Users**. The Manage Users window displays.

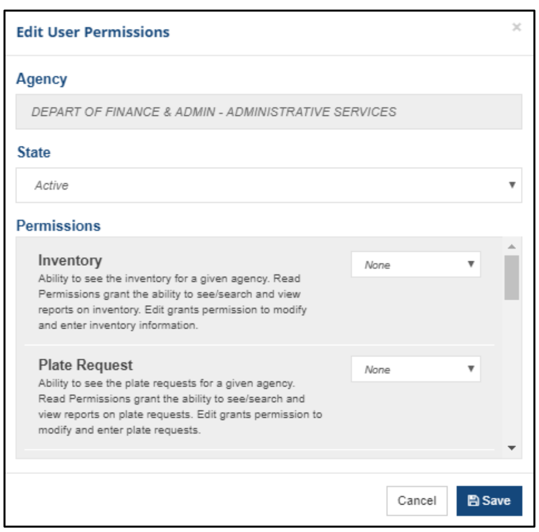



***Manage Users Window***

2. Click **Add Agency User** (at the top of the Results section). The Create window displays.


***Create Window***

3. Enter the user's email address, and then click **Next**.
4. Enter the user's *First Name* and *Last Name*, and then click **Create**. A confirmation message displays (at the bottom of the window) and the Edit User Permissions window displays.




***Edit User Permissions Window***

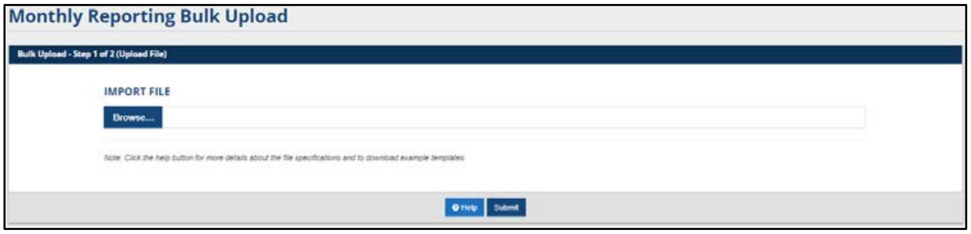
5. In the Permissions section, review and set each of the following user permissions to either *None*, *Read Only* or *Edit*.
    - Inventory
    - Plate Request
    - Funded Request
    - Priority Request
    - Management
    - Waiver Request
    - Quarterly Reporting
    - Bulk Upload
6. Click **Save** when complete. An email is automatically sent to the user notifying him/her an account has been created, along with their SAVA login password.

## 3.7 Monthly Reporting – Bulk Upload

Use this procedure to add multiple vehicle monthly reports at the same time.

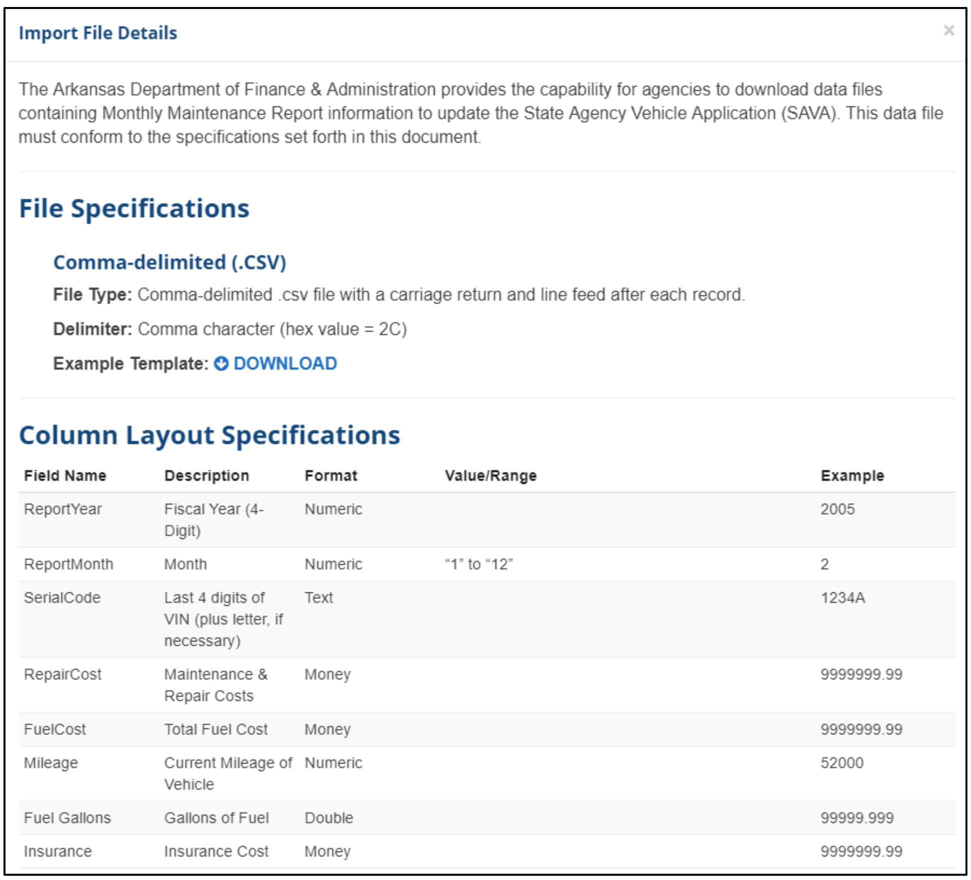
**Note:** Before completing this procedure, prepare and save the monthly report file to upload to the system. (Refer to Step 2)

1. From the sidebar menu, click **Monthly Reporting – Bulk**. The Monthly Reporting Bulk Upload window displays.




***Monthly Reporting Bulk Upload Window***

2. As needed, click **Help** to view the Import File Details window (shown below) that describes the file and column specifications, and to download a bulk import template (Excel spreadsheet).



Import File Details

The Arkansas Department of Finance & Administration provides the capability for agencies to download data files containing Monthly Maintenance Report information to update the State Agency Vehicle Application (SAVA). This data file must conform to the specifications set forth in this document.

File Specifications

Comma-delimited (.CSV)

**File Type:** Comma-delimited .csv file with a carriage return and line feed after each record.

**Delimiter:** Comma character (hex value = 2C)

**Example Template:** DOWNLOAD

Column Layout Specifications

| Field Name | Description | Format | Value/Range | Example |
|---|---|---|---|---|
| ReportYear | Fiscal Year (4-Digit) | Numeric | | 2005 |
| ReportMonth | Month | Numeric | “1” to “12” | 2 |
| SerialCode | Last 4 digits of VIN (plus letter, if necessary) | Text | | 1234A |
| RepairCost | Maintenance & Repair Costs | Money | | 9999999.99 |
| FuelCost | Total Fuel Cost | Money | | 9999999.99 |
| Mileage | Current Mileage of Vehicle | Numeric | | 52000 |
| Fuel Gallons | Gallons of Fuel | Double | | 99999.999 |
| Insurance | Insurance Cost | Money | | 9999999.99 |

***Import File Details Pop-Up Window***

**Note:** Use numerical values for the month and do not include a leading zero “0” (for example, January should be expressed as “1” not “01”).

**Note:** Do not use a comma when entering mileage (for example, enter 41860 instead of 41,860).

3. Click **Browse…**, navigate to the file to be imported, and then click **Open** (or double-click on the file name). The file name displays in the *Import File* field.


***Bulk Upload Window – Reporting File Attached***

4. Click **Submit**. The report file is imported and a file validation window displays.

| If… | Then… |
|---|---|
| Any errors are reported, | Correct the errors and resubmit the file. |

**For your notes:**