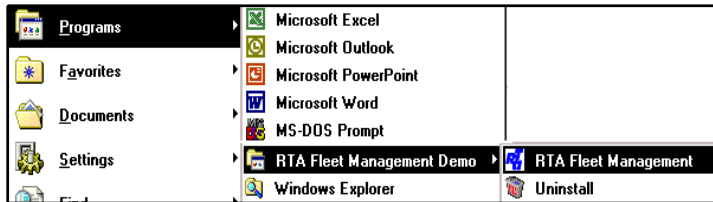


## Installation Instructions

1. Insert the RTA Fleet Management Demo CD in the CD-ROM drive. AutoRun will automatically start the Setup program. If AutoRun is not enabled on your computer system, choose **Start > Run**, type **d:setup** (where **d** is the letter for the CD-ROM drive), and then choose **OK**.
2. Follow the on-screen instructions to install the RTA Fleet Management demo program.

## Starting Up the RTA Fleet Management Software

To start the RTA Fleet Management Software, choose **Start > Programs > RTA Fleet Management Demo > RTA Fleet Management**.



## About the Demonstration...

This demonstration will walk you through creating a work order, posting parts, posting labor, viewing posted transactions, closing, and printing a work order. To follow along with the demonstration, simply **complete the instructions typed in bold letters**.

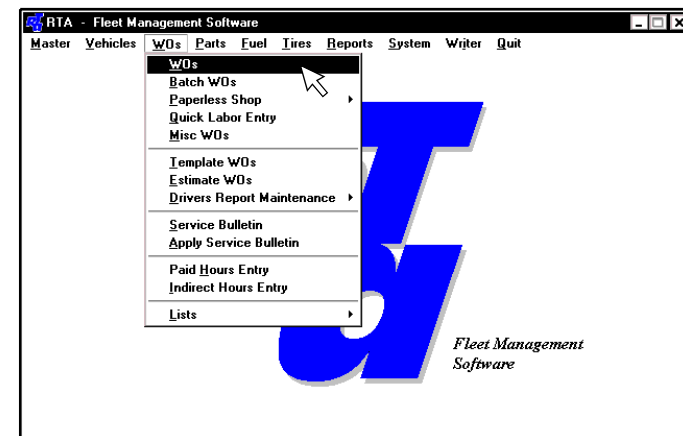
Whenever you are instructed to **choose** an option, you may choose that option by using the mouse or keyboard, depending on your preference. For example, to **choose OK**, you can use the mouse to click the **OK** button, press **Alt+O** using the keyboard, or press **ENTER** if the **OK** button is the active or default button.

You are now ready to begin the RTA Jump Start demonstration. For this demonstration, let's suppose a mechanic gave you a note saying he installed a new battery and cables on your vehicle. The objective here is to demonstrate the use of RTA's Work Order (WO) module and show how it integrates with other modules in the system. Remember **YOU CANNOT HURT ANYTHING** in your demo program. Let's get "jump started."

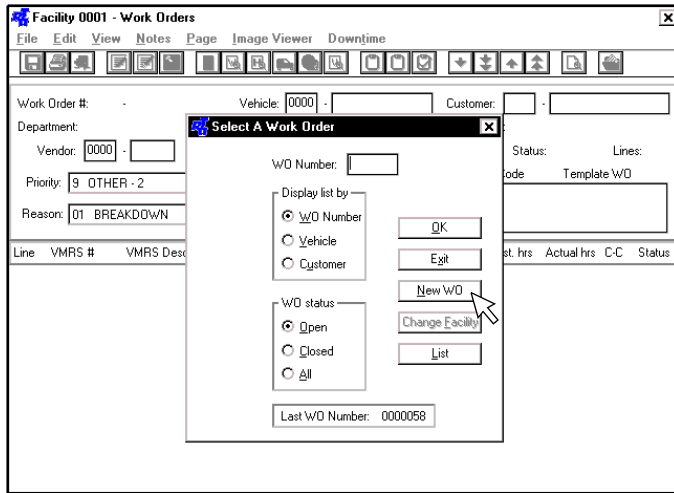
When you first go into the RTA Fleet Management Software, the RTA Main Menu is displayed.



Choose **WOs > WO**s from the RTA Main Menu.



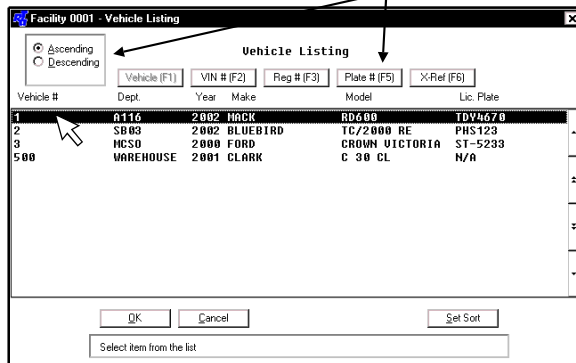
You have several options here. You can access any work order in the system by selecting the appropriate radio buttons or by typing in a specific work order number. You will be creating a new work order, so **choose NEW WO.**



The cursor is now blinking in the vehicle number entry field, prompting you for a vehicle number. **Press the F1 key to view a lookup list of the vehicles in the fleet.** Lookup lists are available throughout the RTA system to help you find data records.

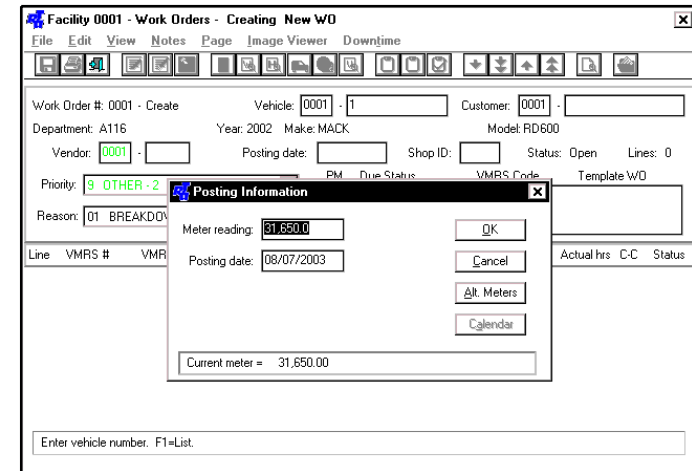
Lookup lists can be sorted in a number of ways to help you quickly locate the needed record.

Double-click to select any vehicle.

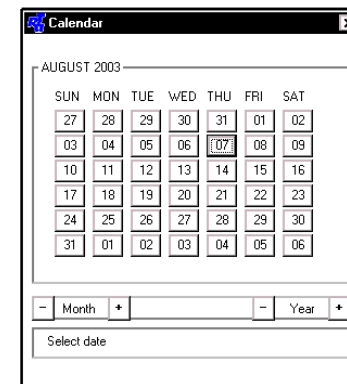


**Select any vehicle from the lookup list** by double-clicking on the desired vehicle or by using the arrow keys to highlight the desired vehicle and then pressing ENTER or choosing OK. (If you select a vehicle that already has an open work order, the work order information will appear. At this point, choose NEW WO.)

You are now prompted for an odometer reading and posting date. If you want the installation of this new battery and cables recorded at a specific odometer reading, **input that meter reading now.** If you do not input a new meter reading, the default meter reading shown, which most likely came from the last fueling of the vehicle, will be recorded.



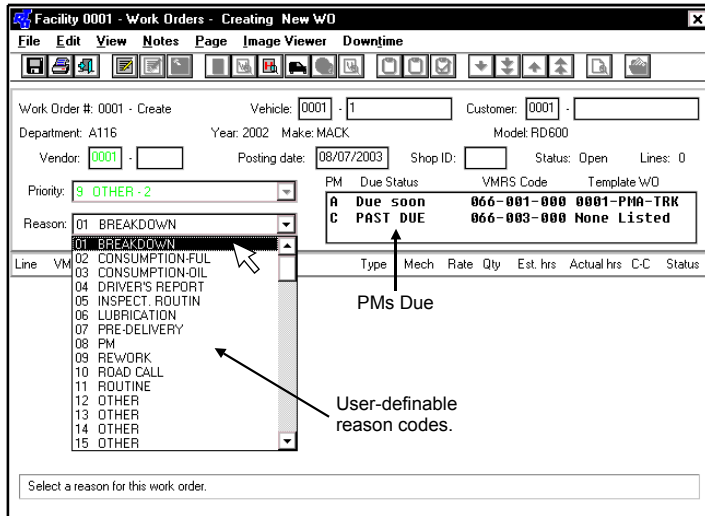
Next, **specify the work order posting date.** This is the date that the battery and cables were installed. The current system date is displayed as the default posting date. To change the date, simply enter in a new date in MMDDYY format or press F1 to select a date from the calendar.



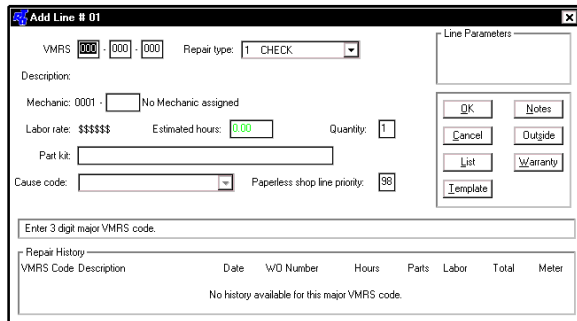
After the meter reading and posting date have been set, **choose OK to continue.** Press ENTER at the customer number prompt to leave the customer field blank. You should now be in the Reason Code field (if not, continue to press ENTER until you are).

Before we select a reason code, notice that the system lets us know that PM A is due soon and PM C is past due. If an open PM work order existed, the work order number would be displayed in the PM information box.

Work order reason codes can be defined by you. **Click the down arrow in the highlighted box to view the list of reason codes. Select 01 BREAKDOWN as the reason code and then press ENTER.**

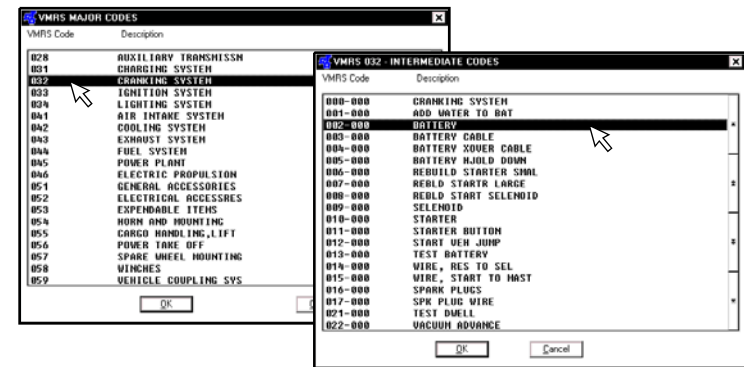


The “Add Line #01” window now appears. Each work order line represents a job that will be performed on the vehicle.

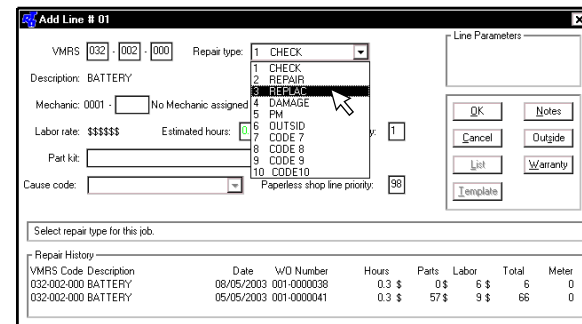


The RTA system uses VMRS (Vehicle Maintenance Reporting Standards) for identifying repairs. The RTA system comes complete with the VMRS codes. You can change these codes to fit your needs. This demo uses six-digit VMRS codes.

**Choose LIST or press F1 to access a lookup list for the VMRS major codes. Select 032 CRANKING SYSTEM from the list by typing 032 or using the arrow keys on the keyboard to scroll through the list; choose OK or press ENTER afterwards. The arrow buttons along the side of the lookup list can also be used to scroll up and down a line or page. Once the major code has been selected, the list of VMRS intermediate codes will appear, select 002-000 BATTERY from the list.**



You are now prompted to select a Repair Type. You can select one of ten user-definable descriptions. We will be replacing the battery so select 3 REPLAC by typing 3 or by selecting it from the drop down list; press ENTER afterwards to move to the next field.



The RTA system will now prompt you for the mechanic who performed the work. **Choose LIST or press F1 to select a mechanic from the employee lookup list.**

When using the employee lookup list, you have the option of sorting by employee number, abbreviation, or name. **Select a mechanic from the lookup list.**

Number	Abbr.	Name
0001	BILL	Bill Anderos
0002	PETE	Peter Gardner
0027	AJ	Andy James
0002	MARY	Mary Cole
0005	RC	Rick Cosletti
0090	Sam	Samuel James Baxter
1213	DJ	Derrick Jostler

You will now be back at the “Add Line #01” window. The mechanic information will be filled in as will the VMRS code and repair type. Please notice, at the bottom of the window, that the last repairs for the major VMRS code we selected are displayed.

Repair history display.

VMRS Code	Description	Date	W/O Number	Hours	Parts	Labor	Total	Meter
032-002-000	BATTERY	08/05/2003	001-0000038	0.3 \$	0 \$	6 \$	6	0
032-002-000	BATTERY	05/05/2003	001-0000041	0.3 \$	57 \$	9 \$	66	0

Up to three of the most recent occurrences of this repair are displayed for your reference. This gives you quick and easy access to the vehicle repair history, which can help point out potential problems if repairs are occurring frequently in this area.

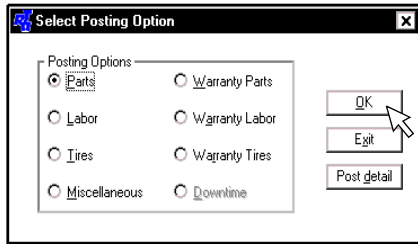
You are now prompted for the quantity (how many times to perform this job). **Press ENTER to accept the default value of “1.”** The final prompt in this window is for the Paperless Shop priority code; **press ENTER to accept the default value of “98”** (ask your sales representative for details about Paperless Shop). The system will now highlight the OK button. **Press ENTER or click OK to add this job to the work order.** Depending on the vehicle selected, you may or may not get a message stating the vehicle is under warranty coverage. This message displays if you are tracking vehicle warranties and the job added to the work order is covered under warranty; choose OK to continue.

Now you can record notes for this work order. Notes are not required. **Enter some notes and then choose OK or choose Cancel if you do not wish to add notes to the work order.**

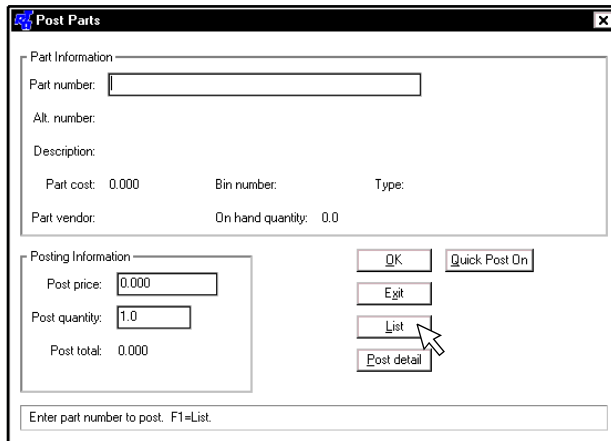
That completes the process of adding a job to the work order! The RTA system will now prompt you to “Add Line #2.” If you had any other repairs to do to this vehicle, you would repeat the process for each job. We don’t need to add any other jobs to this work order so **choose Cancel**. Your newly created work order is now displayed on the screen and should look *similar* to the one shown.

Line	VMRS #	VMRS Description	Type	Mech	Rate	Qty	Est. hrs	Actual hrs	C-C	Status
1	032-002-000	w BATTERY	RPL	1		1	50			Unshd

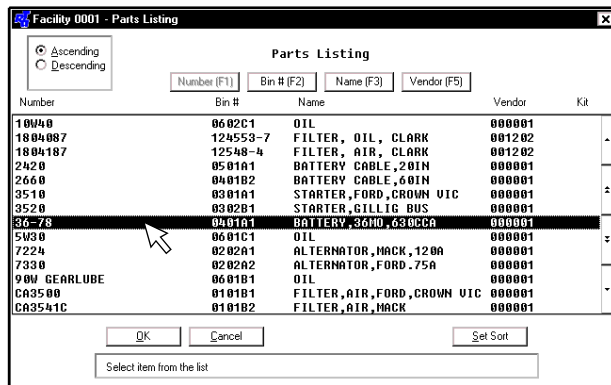
This work order is now created. Click the **Post Line** icon in the toolbar. This brings up the “Select Posting Option” window. Posting Parts is the default option; choose **OK**.



The “Post Parts” window now appears, prompting you for a part number.

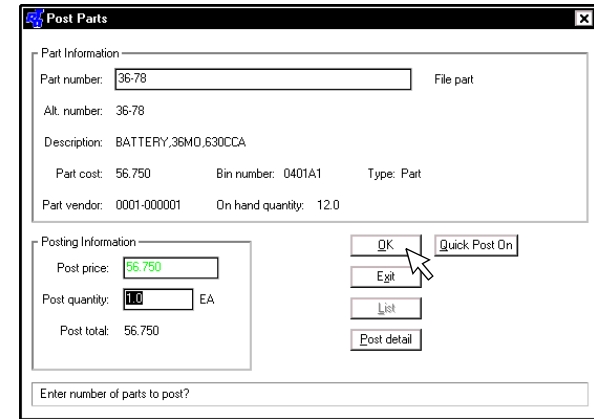


Choose **LIST** or press **F1** to access the parts lookup list.

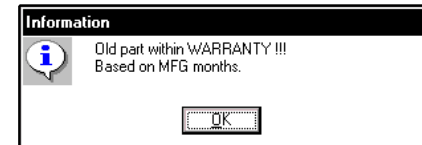


You can look up the needed part by number, bin, description (name), or vendor. Select part number **36-78 BATTERY,36MO,630CCA** from the list.

The selected part description, price, and other information are displayed in the “Post Parts” window. You are now prompted for the quantity to post. You will be posting the default quantity of “1,” so choose **OK to post the part to the work order**. The RTA system will post the part, decrease the inventory by the quantity posted, and create a requisition if the quantity on hand falls below the reorder point.



The RTA system will inform you if the part being replaced is covered under warranty.



The part warranty tracking is independent of the vehicle warranty tracking. RTA customers have saved thousands of dollars with these standard warranty tracking features. This warranty information can be printed so you can get credit from your vendor. Choose **OK** or press **ENTER** and the system will continue to post the part to the vehicle in the system. The system will complete its posting and prompt you to post another part. You can post another part or choose **EXIT** to close the “Post Parts” window.

You will be returned to the “Select Posting Option” window. Notice that the default posting option has now changed to Post Labor. You can, however, choose what you need to post. For demonstration purposes, **accept the Post Labor default and choose OK or press ENTER.**

The “Post Labor” window now appears, prompting you for a mechanic number. **Press ENTER to accept the default mechanic displayed.**

You are now prompted for the hours worked. The estimated hours to complete the job is displayed as the default. This number comes from the VMRS code that was selected when you added the job to the work order (page 6). **Type in 1 to post one hour of labor to this job and then choose OK.** The labor will now be posted to the work order and vehicle. The “Select Posting Option” window reappears. At this point, we could post another mechanic, post another part, post tires, post outside work, etc. You also have the **POST DETAIL** option, which will display all the transactions that have been posted to this work order. **Choose **POST DETAIL** to view the transactions you have posted to this work order.**

If you get interrupted and are not sure of what has been posted to the work order, the **POST DETAIL** option is great for verifying what has been posted. The “L” in the first column represents labor, the “P” for parts.

Type	Date Posted	Mechanic/Part number	Hours/Quantity	Price/Wage	Total
L	08/07/2003	0001-0001 BILL	1.000	30.000	30.000
P	08/07/2003	0001-36-78	1.000	56.750	56.750

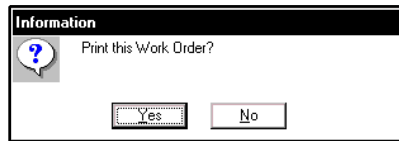
Line 1 totals: Transactions: 2 Line total: \$ 86.750

**Choose OK to return to the “Select Posting Option” window and then choose EXIT.** The RTA system now prompts you to close the work order line.

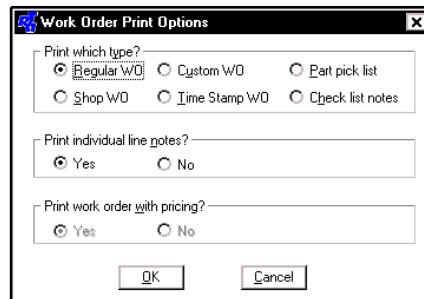
**Choose YES or press ENTER to close the work order line.** The system will then go through the process of updating the work order line, vehicle history, and mechanic productivity. You will then be prompted to close the work order.


**Choose YES or press ENTER to close the work order.** The work order status will be updated.

You then have the option of printing a copy of the work order.



Choose **YES** or press **ENTER** to print the work order. When the “Work Order Print Options” window comes up, choose **OK** to accept the print defaults and then choose **VIEW/PRINT**.



When you are done viewing the work order, click the **Exit icon**  in the toolbar. At this point, you are prompted for another work order number. Choose **EXIT** to return to the RTA Main Menu.

This completes the demonstration of the RTA Fleet Management Software. You have successfully created, posted parts and labor costs, closed, and printed a work order. CONGRATULATIONS!!

For a complete phone demonstration of the RTA software, call 800-279-0549.

The following records have been changed as a result of the work order you processed in the RTA system.

- ✓ The vehicle odometer has been updated.
- ✓ All vehicle costs, including cost-per-mile have been updated.
- ✓ Total fleet costs have been updated.
- ✓ All repair history for this vehicle reflects the install of this new battery.
- ✓ Mechanic productivity statistics have been updated.
- ✓ Fleet history concerning charging systems (VMRS code 032) has been updated.
- ✓ All notes concerning this job are available for retrieval at any time.
- ✓ Parts inventory was reduced for a battery.
- ✓ Parts usage history has been updated.
- ✓ The system has saved information about a warranty credit for the bad battery.
- ✓ Component failure statistics were updated for that battery and vendor.
- ✓ A paper work order is available for history filing.
- ✓ You have learned much about the RTA Fleet Management Software in a short period of time.



**RON TURLEY ASSOCIATES, INC.**

For a more complete demonstration, contact our office to schedule a phone demonstration.

***If you have any questions give us a call!***



**RON TURLEY ASSOCIATES, INC.**

**800-279-0549 North America**

**623-581-2447 Worldwide**

**623-582-1747 Fax**

**sales@rtafleet.com**

**www.rtafleet.com**

## NOTES