THE UNIVERSITY OF
**WAIKATO**
*Te Whare Wānanga o Waikato*

smartrak™

# Fleet Management Manual & User Guide

## Quick References

| Financial Services Division | |
|---|---|
| **Fleet Management** | |
| Book a University Fleet Vehicle | http://fleet.waikato.ac.nz/ |
| Contact ITS Service Desk for system issues and help | help@waikato.ac.nz |
| Contact Fleet Management | fleet@waikato.ac.nz |
| How to make a booking | Click here |

## Contents

**Home**

# 1. Financial Services Division (FSD)

Fleet Management is part of FSD who provides centralised accounting and financial services to the University. Check out the FSD Home Page, and click here to Contact Us.
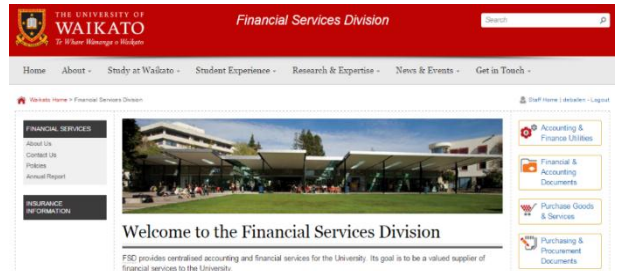
Want to know more about Fleet Management? Have a read of the August 2015 *Community* article.

## 1.1 Supporting policies, and documents

It is important to familiarise yourself with the following policies which relate to using the University Vehicle Fleet.

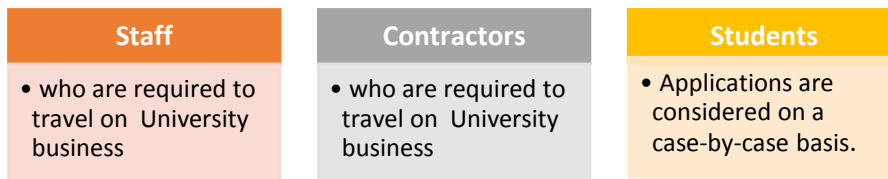| | |
|---|---|
| Safe Driving Policy | Health and Safety Policy |
| Travel Policy | Staff Code of Conduct |
| Rental Vehicle Policy | PCard Manual *(UoW Corporate Credit Card)* |
| Use of Private Vehicles for University Business Policy | New Zealand Road Code |

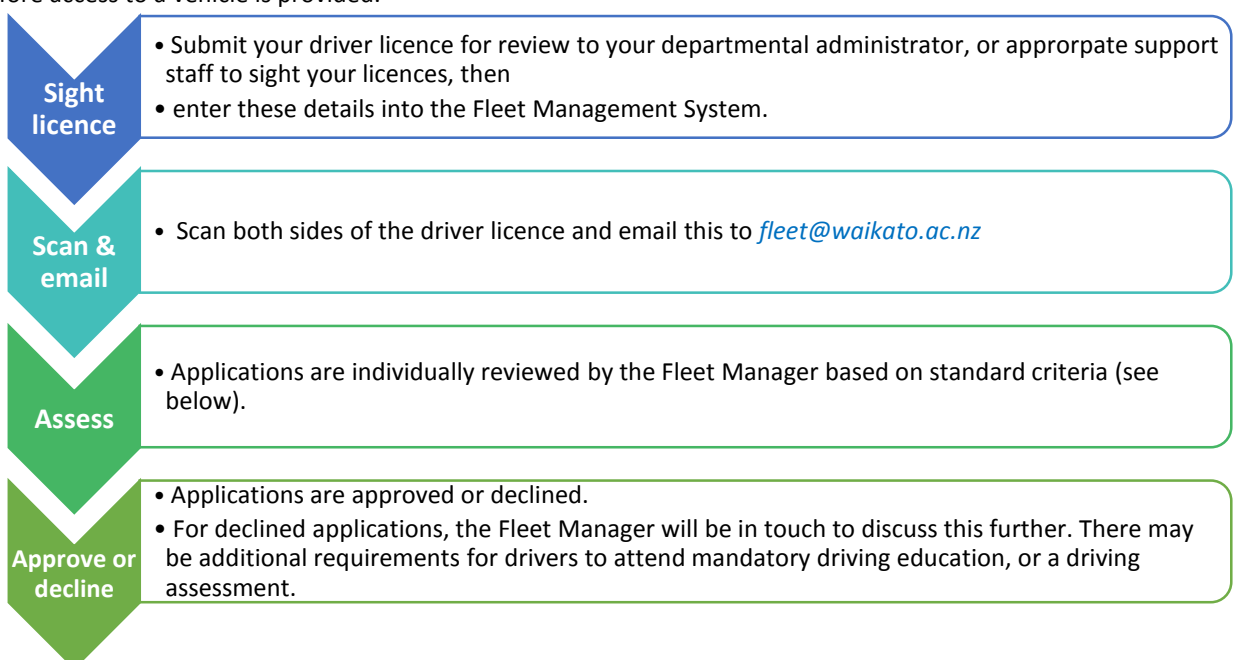# 2. Getting Started

## 2.1 Who can drive a University fleet vehicle?

| Staff | Contractors | Students |
|---|---|---|
| • who are required to travel on University business | • who are required to travel on University business | • Applications are considered on a case-by-case basis. |

## 2.2 How to apply

If you are new to the University, or new to using a University fleet vehicle, all drivers must submit an application before access to a vehicle is provided.

**Sight licence**
- Submit your driver licence for review to your departmental administrator, or approrpate support staff to sight your licences, then
- enter these details into the Fleet Management System.

**Scan & email**
- Scan both sides of the driver licence and email this to *fleet@waikato.ac.nz*

**Assess**
- Applications are individually reviewed by the Fleet Manager based on standard criteria (see below).

**Approve or decline**
- Applications are approved or declined.
- For declined applications, the Fleet Manager will be in touch to discuss this further. There may be additional requirements for drivers to attend mandatory driving education, or a driving assessment.

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**Standard Criteria**

During the assessment phase, the Fleet Manager considers the following:

- Which side of the road you normally drive on
- Age of applicant
- Driving experience, and number of years with a current licence
- Any driving convictions
- Type (or level) of driving licence. Learners, restricted, or full?
- Nationality of driver licence
- The NZTA licence rules and regulations

### 2.3 The New Zealand Transport Agency (NZTA)

The NZTA outlines information on international licenses, road rules, and how to apply for a New Zealand driver licence.



**Who can drive on NZ roads?**

**Converting to a NZ driver licence**

### 2.4 Fuel cards – Caltex StarCard

When refuelling rental vehicles and University fleet vehicles, the preferred payment method is for staff to use a University fuel card, i.e. a *Caltex StarCard*. This card provides a discount of about 10 to 20 cents off the price at the pump, and reduces fuel costs for the University. The fuel card is used when staff are on University business.

Fuel cards and instructions on how to use them are located in each vehicle. It is expected that drivers will return vehicles with a minimum of half a tank of fuel, to be considerate for the next booking. Fuel cards and instructions on how to use them are located in each vehicle.

### 2.5 Vouchers for petrol / fuel

Petrol / fuel vouchers may only be purchased by research project leaders, and only for the purposes of reimbursing external participants in research projects for private vehicles mileage claims. Refer to the PCard Manual for further advice on purchasing petrol/fuel vouchers. (*See PCard Restricted Uses*)

## 3. Using the Vehicle Booking System

The intelligent booking system, built by Smartrak, uses Global Positioning Systems (GPS) tracking to reduce the University's carbon footprint. The new system strives to improve vehicle utilisation, and make the booking experience more convenient for staff. Depending on vehicle availability, the system detects and manages late vehicle arrivals, reallocates unused vehicles, and allows staff to car pool.

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## 3.1 The booking chart

The first page is the colour coded *booking chart*, which displays fleet vehicles and their availability.



To see what the vehicle looks like, float the mouse over your mouse over the listing.

**Category** and **plant type** menus provide additional details about the vehicles options. The category outlines the number of passenger seats.



These menus also display non GPS items that can be booked, such as trailers and boats.

**Tip** — To get to the booking chart at any time, click on the calendar icon located beside the smartrak logo.
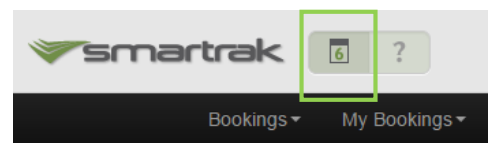
## 3.2 Make a booking

There are several ways to make a booking, from the bookings tab, or from the booking chart.
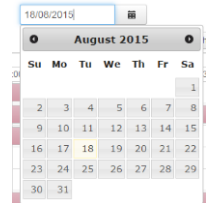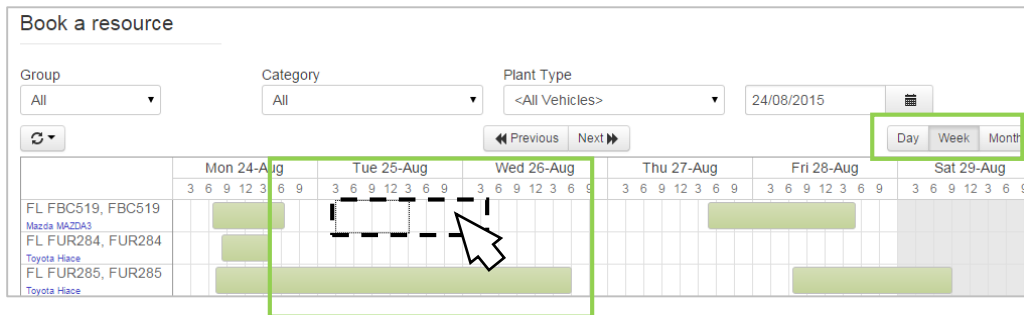
**1. The booking tab**

Click bookings, then make a booking. Using this booking method allows users to search all available vehicles, and if there are some travelling to the same destination for car-pooling.  It will also display all available vehicles during the selected timeframe.
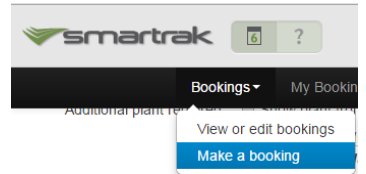
**2.  The booking chart**

Bookings can also be made directly from the booking chart by dragging the cursor anywhere across the chart **in the white 'free' space**. This will instantly generate a *new booking* pop up screen.

Use the date navigator by day, week, or month.

**Fill in the booking form:**
Enter all relevant booking details, pick up and return points, duration, destination, and journey reason/context. Add in the cost centre, and name of passengers (is applicable). Then click save to confirm the booking. An email will be sent which confirms the booking, and this can be added to your outlook calendar.

**Cost Centre:**
An appropriate department account code needs to be used for all bookings.

Add-on a trailer

Click **save** to confirm the booking

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### 3.3 Review or edit a booking

Your bookings will appear in the 'my bookings' menu. Click on a booking to see the details. Users can also edit or delete the booking.

| My Bookings ▾ | My Details |
| --- | --- |
| 132527   Mr Grey | ι, 26 Aug 2015 09:30 to Hamilton CBD, FL FUR284, Approved |
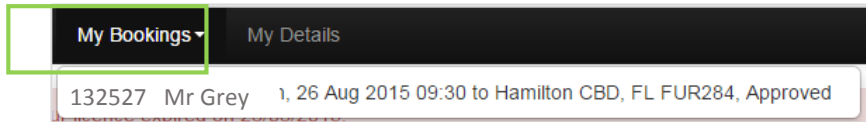
**Tip**   You can only delete bookings that **haven't** been checked in.

### 3.4 Returning vehicles early

The system does not know if you have returned a vehicle early. So if drivers (and/or support staff) update the system, by logging their vehicle back early, then other staff can use these vehicles. To return a vehicle early, under 'my bookings' and simply edit the booking.

### 3.5 Car pooling and 'book a seat'

The system allows for car-pooling. If there is a booking (that ma system checks for bookings within a 30 minute departure time (for start and return journeys) and within 30 minutes to see if there are spare seats are available for their staff to book. To search for available seats, use the 'bookings' tab, and 'make a booking'.

**Available seats:**

| Return Trip | Journey To | Journey From | Driver | Departure Time | Return Time | Vehicle | Available Seats | |
| --- | --- | --- | --- | --- | --- | --- | --- | --- |
| Confirm | Confirm | Confirm | Margaret Dobson | 27/08/2015 9:00:00 a.m. | 27/08/2015 5:00:00 p.m. | FL GAT488 - 2011 Mazda MAZDA3 (GAT488) | 3 | |

**Available plant:**

| | Type | Name | Rego | Make | Model | Year |
| --- | --- | --- | --- | --- | --- | --- |
| Confirm booking | Mini Bus - Towbar | FL FUR285 | FUR285 | Toyota | Hiace | 2011 |

### 3.6 My Details

Every driver need to update their profile details via the 'my details' tab. There are several system preferences that can be adjusted here such as txt reminders, notifications for 'on behalf of' bookings, and the type of licence held.

| | |
| --- | --- |
| Notify me when I make bookings on behalf of others | ☐ |
| Txt me reminders and cancellations | ☐ |
| | Driver or Passenger   Passenger Only |
| NZ Licence | ☐ |
| Licence Number | DG969969 |
| Licence Expiry Date | 26/08/2015 📅 |
| Licence Classes | ☑ 1. Car |
| | ☐ 2. Medium Rigid |
| | ☐ 3. Medium Combination |

### 3.7 Other system features

| | Description |
| --- | --- |
| **Book on Behalf** | Support staff and administrators can book on behalf of others. Just select the 'on behalf of' tick box, and identify the driver. |
| **24 hour clock** | Helps to minimise errors around booking times. |
| **60 minute auto cancellation** | If a vehicle is not picked up within 60 minutes, then they are made available back into the schedule to be re-booked. Staff can manually edit their booking to ensure they don't lose their vehicle, if required. |
| **Reminder Texts** | The system sends these out to the booker if a vehicle will be cancelled. |

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| | |
|---|---|
| **Auto vehicle allocation (if available)** | If a vehicle is not back 15 minutes before the next booking, the system will search for an alternative vehicle (if there is one available) and allocated this instead. |
| **Recurring Appointments** | The system can handle recurring bookings for up to 12 months. |
| **Health & Safety (option)** | Passenger names can be can be entered into the booking details for health and safety purposes. |
| **No More Running Sheets** | The GPS system tracks the kilometres that vehicles travel, so there is no longer a need to manually keep a running sheet for distances. |
| **Charge Rates** | These are set at differing levels for each vehicle type. |

# 4. Protocols for University Vehicle Use

## 4.1 Pick-up and drop-off

**Hamilton Location**

a) Collect vehicle keys from Security, located beside B Block.
b) Fleet vehicles are kept in designated parking spaces in front of the Unisafe/Security building.
c) Your personal car can be parked in the designated area while using the pool car. Note: this is left on campus at your own risk.
d) If you leave your car in the designated area, please ensure the "Vehicle Exchange" sign, located in the vehicle, is placed on the dashboard of your personal car. This will prevent your personal vehicle from being towed away.
e) For collection or return of the vehicle after hours, contact Security via the emergency phone located next to the front door of the Unisafe/Security building. Security will then meet you for the delivery or return of vehicle keys.
f) It is expected that users of these vehicles return them at least half full of petrol and in a clean and tidy condition. **Fuel cards** and instructions on how to use them are located in each vehicle.

**Non Hamilton Locations**

Vehicles in locations other than Hamilton campus have different methods of collection and return depending on the circumstances that apply to their specific location. Please contact Fleet for further information.

## 4.2 General vehicle use

4.2.1    All reasonable care must be taken in the use and parking of the vehicle; the vehicle must be left securely locked when in your care.

4.2.2    The vehicle may only be driven by the person named on the booking confirmation advice. All drivers must have approval as an authorised driver of University motor vehicles. Users must not allow a third party to drive a University Vehicle unless prior approval has been obtained from the University Vehicle Fleet Manager (except in an emergency).

4.2.3    If the vehicle is damaged or requires repair or salvage, whether because of an accident or breakdown, please contact the University Vehicle Fleet Manager by telephone as soon as possible (contact details inside blue folder in car)

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4.2.4    Please return cars with at least a half full tank of petrol. To use the University's CALTEX fuel card: Swipe card, pin number is the last 4 digits on the card and enter the odometer reading

4.2.5    Please show consideration for the next driver by keeping the car clean and tidy.

4.2.6    University vehicles are provided for the express purpose of travel on University business i.e. any activity that a staff member is expected to undertake during the course of his/her employment.

4.2.7    All University vehicles are subject to Fringe Benefit Tax.

4.2.8    The terms of Fringe Benefit Tax (FBT) means no private use of University vehicles is allowable. Private use encompasses anything that is not University related i.e., travelling to and from work, or taking University vehicles home.

4.2.9    Vehicles may only be taken to private homes if the employee is leaving very early the next morning or arriving back very late. These instances will be subject to FBT at a rate of per night (this excludes specially modified University vehicles).

4.2.10   When away overnight from your place of origin, vehicles may be used within the same location to go out for meals, visiting etc.

4.2.11   Children are not permitted to be carried in University vehicles.

4.2.12   Fare-paying passengers are not permitted to ride in a University Vehicle.

4.2.13   The picking up of hitchhikers is not permitted.

4.2.14   It is the driver's responsibility to ensure that the vehicle is road worthy, which includes ensuring that the vehicle has a current Warrant of Fitness and Registration.

4.2.15   The driver must not use a cell phone while driving unless using an appropriate hands free device.

4.2.16   All University vehicles should be seen as an extension of your workplace and therefore all relevant University policies apply.

4.2.17   The driver must adhere to the New Zealand road code at all times. The University supports safe, defensive driving.

4.2.18   All penalties relating to parking and/or traffic offences are the responsibility of the person named on the booking confirmation.

4.2.19   As per the Safe Driving Policy, University vehicles may be fitted with a GPS which means that their use can be monitored at any time.

4.2.20   As per the Safe Driving Policy, where GPS data or a complaint received by a member of staff, or the public, that indicates a University vehicle has been misused, the matter will be addressed by the University Vehicle Fleet Manager. Any subsequent suspicions of misuse will be reported to the relevant line manager and the CFO, and the driver may be subject to disciplinary action under the Staff Code of Conduct.

## 4.3 Accessibility and use of GPS information

Each University vehicle is fitted with a GPS device. This allows the University to better understand the usage of its vehicles, and manage tax and rebates (Fringe Benefits Tax). It also allows vehicles to be monitored for unapproved private use, if this occurs.

- Live feed and reports from *Smartrak* and only accessed by the systems administrators. This is limited to University Vehicle Fleet Manager, Chief Financial Officer and/or their assigned delegates
- All data received relates to the use of vehicles
- Checks will be undertaken to ensure no private use occurs (as per the IRD Acts and Regulations)
- If misuse of a vehicle occurs (misuse includes, but is not limited to: speeding, dangerous or careless driving, traffic infringements, a breach of conditions of personal use or other University of Waikato related polices), it will initially be dealt with by the University Vehicle Fleet Manager. Subsequent misuse will be reported to HRMD and the respective Line Manager.
- All live feed information and reports, specific to a named driver, will remain confidential to system administrators, relevant line managers and HR personnel.

# 5. About the University Vehicle Fleet

The University has gradually transitioned to a hybrid vehicle fleet. From an environmental perspective, hybrid vehicles deliver higher fuel efficiency and fewer emissions than their strictly petrol counterparts. The above benefits align with the University's commitment to environmental sustainability. For more about Toyota Prius, click here.

**The fleet consists of the following:**

1 x Mazda 3' with towbar  (4 seater)
1 x Toyota RAV 4          (5 seater)
8 x Toyota Prius C Hybrids (4 seater)
1 x Toyota Previa         (8 seater)
1 x Nissan Minibus        (11 seater)
2 x Toyota Mini buses     (12 seater)

**Specialist vehicles**
There are some specialist vehicles such as trailers and boats that are restricted bookings. Contact Fleet for further details.

**Location of vehicles**
Vehicles are situated outside Security beside B Block, and can be accessed by all staff at the University.

# 6. *Smartrak* and Global Positioning Systems (GPS)

The intelligent booking system, built by *Smartrak*, uses GPS tracking to reduce the University's carbon footprint. The new system strives to improve vehicle utilisation, and make the booking experience more convenient for staff. Depending on vehicle availability, the system detects and manages late vehicle arrivals, reallocates unused vehicles, and allows staff to car pool.

**Click here to visit Smartrak**

**Benefits of GPS in University vehicles**
Each vehicle is fitted with a GPS device, and these have a range of benefits.

- To better understand the usage of its vehicles, an manage the necessary tax and rebates requirements (Fringe Benefits Tax)
- Protect the wellbeing and safety of staff working alone or in remote areas
- Monitor unapproved private use of University vehicles, if this occurs
- Increased road safety – as well as improved safe driving image of your fleet
- Ensure only authorised and suitably licensed staff are operating vehicles
- Rapidly respond to and recover stolen vehicles
- Be alerted to undesirable driver behaviour as it occurs

For more information on the accessibility and use of GPS information, click here.

**Electronic fence**

The University has an elective GPS fence (or geofence) around its outskirts. This links to the booking system and identifies when a vehicle has returned. While the vehicle is within its booking period, the system won't return the vehicle until the end of the booking period. If a vehicle is returned early, the booking can be edited in the system.