

Version 25



Trapeze
Enterprise Asset Management

Reservations

Administrator Guide

Trade Secret | February 2025

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Technical Support

Trapeze provides several ways to connect with the Customer Care team. Please provide detailed information to the representative. If you are reporting an issue by e-mail, include any error messages, screen shots of your problem, and steps to replicate the issue.

Customer Care is available Monday through Friday, 8:00 a.m. to 8:00 p.m., Eastern Standard Time.

Toll-Free Telephone: 1-877-411-8727

E-mail: cc@trapezegroup.com

FTP Site: <https://ftps.trapezegroup.com/>

Web Site: <https://collaborate.trapezegroup.com>

The website provides access to Trapeze Collaborate which offers resources to implement and operate the software, search knowledge, participate in communities, log/track service requests, sign-up for release alerts, view product health recommendations, and download updates or documentation. For secure access to Collaborate, contact Customer Care through the website or by calling the number above.

Product Compatibility

Refer to the latest [Product Compatibility](#) information on Trapeze Collaborate for requirements including operating system information, databases, Crystal reports, network protocol, HTTP servers and browsers that are supported.

Reservations - Administrator Guide

Version 25.x

February 2025

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1. Overview

Reservations Module is an easily deployed, browser-based user interface that allows your customers to create, view and modify their motor pool reservations. The module also provides the option to email confirmation tickets to users requesting reservations. The Reservations Module improves efficiency by providing users with instant access to the information they need to streamline the reservation process.

Requirements

Application 25.x

Web Modules 25.x

Customer Access Module (for standalone kiosk Reservations portals only)

Assumptions

This guide assumes familiarity with workflows and configuration of the application.

- ❗ User defined required fields that do not appear in the Web Modules will return validation messages.
- ❗ Special characters cannot be placed into the Web Modules fields or unanticipated results may occur. This would include any character that cannot be typed with a standard keyboard.
- ❗ Do not use the browser's **Back** button in the Web Modules as unanticipated results may occur.
- ❗ Do not open or use the same instance of the web portals in multiple browser windows or tabs. This can cause errors or unexpected performance issues.

2. Installation and Upgrade

The Reservations Module may be utilized as a tab in Web Modules or as a standalone application to give customers access via the web. Please refer to the *Administrator Guide, Install and Configure Modules* section for instructions on installing modules.

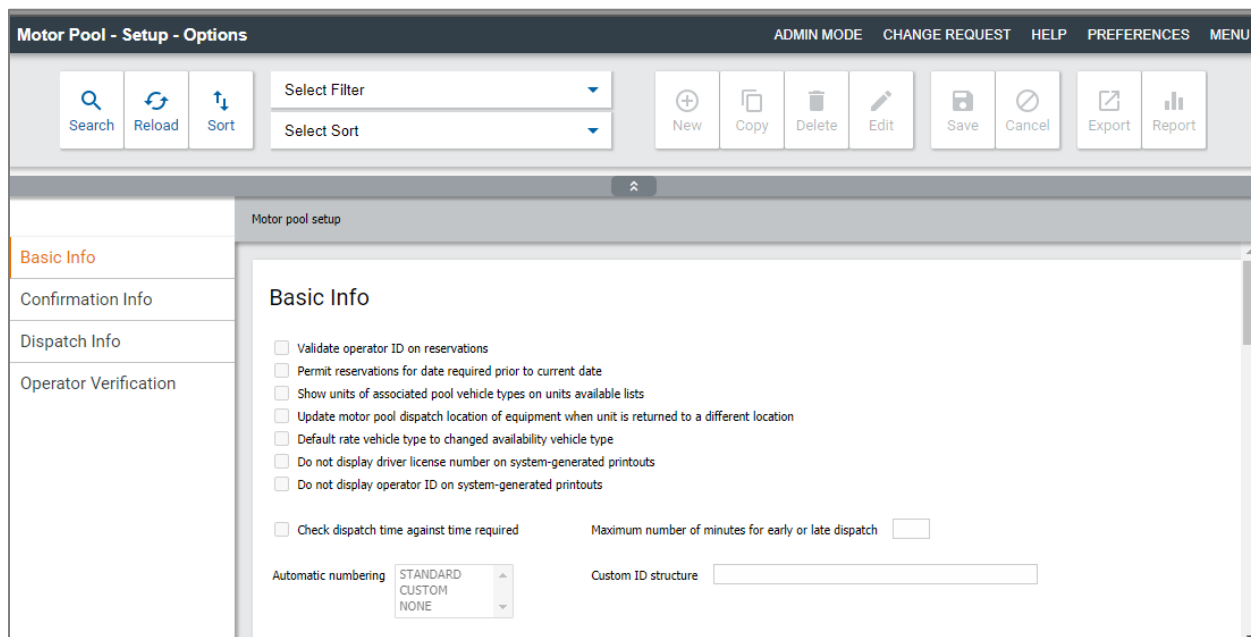
- If your organization is using Reservations as a Web Modules tab, you must create a tab for Reservations to view and process transactions. Please refer to the *Administrator Guide, Web Modules Configuration - Adding Modules and Tabs* section for detailed instructions on adding new tabs and configuring security access for those tabs.

3. Configuring the Reservations Module

The Reservations Module is configured through the Vehicle Reservations Setting page. After changing any settings or adding new settings, click **Save** to save your configuration.

 Use the user interface (UI) controls to customize labels in the Reservations portal. Refer to the *Administrator Guide* for details on various UI options.

The Motor Pool – Setup – Options screen in Enterprise Portal contains configuration information for this module. Please review the settings for Basic Info, Confirmation Info, Dispatch Info and Operator Verification setup.



The screen includes two setup options: **Do not display driver license number on system-generated printouts** and **Do not display operator ID on system-generated printouts** that allow you to configure Reservations to not display Operator IDs on application-level reports.

 **Note:** The Reservations portal email template (discussed below) allows you to hide the operator ID in the email notification. The settings on the Options screen affect the application-level reports (not Crystal reports or the Reservation portal email report).

Basic Info

- ☐ Validate operator ID on reservations
- ☐ Permit reservations for date required prior to current date
- ☐ Show units of associated pool vehicle types on units available lists
- ☐ Update motor pool dispatch location of equipment when unit is returned to a different location
- ☐ Default rate vehicle type to changed availability vehicle type
- ☐ Do not display driver license number on system-generated printouts
- ☐ Do not display operator ID on system-generated printouts

☐ Check dispatch time against time required
 Maximum number of minutes for early or late dispatch

Automatic numbering

STANDARD
CUSTOM
NONE

 Custom ID structure

- ✓ The option to **Permit duplicate overlapping reservations for an operator** is located on the Departments – Primary Information screen, Basic Info tab.

Departments

ADMIN MODE CHANGE REQUEST HELP PREFERENCES

Search

Reload

Sort

Select Filter

Select Sort

New

Copy

Delete

Edit

Save

Cancel

Export

Rep

Department ID

Basic Info

More Info

Accounts

Rates and Markups

Roll-ups

Message Printers

Fueling

Attributes

Basic Info

Name

Account ID

Contact name

Address

Line 2

Line 3

Line 4

Phone

Fax

Phone 2

Phone 3

Phone 4

Full time equivalents

Institution group ID

Customer type

Calendar ID

Email address

Company ID

Preferred contact

☐ Motor pool

☐ Print motor pool confirmation tickets

☐ Active

☐ Permit duplicate overlapping reservations for an operator

Access the Vehicle Reservations Setting Page

How you access the Vehicle Reservations Setting page depends on whether you are using the Web Modules Reservations tab or using Reservations as a standalone (kiosk) application.

-  **Note:** Standalone and module modes can be used interchangeably, but the module options are stored separately for each mode (and for each tab, if multiple tabs exist).

Using a Web Modules Reservations Tab

To access the Vehicle Reservations Settings page through a Web Modules tab, follow the steps below.

1. Log in to web modules using your administrative user ID and password and click the Reservations tab.

The Login to Reservations Portal page displays.



 The Login page is optional and used when User ID is not required for login in module mode. It is used for all logins in standalone mode.

2. Complete the required fields.
3. Click the **Login** button.
4. Click the pencil icon to go to the Vehicle Reservations Settings page.

The Reservations Main page displays.

The Vehicle Reservations Settings page displays.

5. Continue to the [Vehicle Reservations Settings Page](#) section below to configure Reservations.

Vehicle Reservation Settings Page

To edit vehicle reservation settings:

1. Open the Reservations module and click the pencil icon on the Main page.

The Vehicle Reservation Settings page displays.

Security Options

☐ Require FA User for each Operator

[Shared User Settings](#)

FA Reservation Source:

Home URL:

[Restore Default](#)

Operator Permissions

☒ Allow creation of new operators (applies to Use the following FA authentication for all logins)

☒ Allow operators to edit OPERATOR DETAILS

☒ Allow additional operators on a reservation

☒ Require valid operator license expiration date

Required Fields for Login

Used only when Require FA User for each Operator is NOT set

☒ Operator ID

☐ Email Address

☐ Department ID

User Interface Definition

Cancel Message:

Thank You Message:

Message for users making NEW reservations:

Date/Time Values in 24 hour or 12 hour format:

Default pickup time - add X minutes to current time: (default = 15)

[Cancel](#) [Save](#)

The Vehicle Reservation Settings page gives you the ability to tailor Reservations for your organization. It is here that you have flexibility to determine what the users see on the page when making reservations. The page is divided into several sections: Security Options, Operator Permissions, Required Fields for Login, User Interface Definition, Reservation Options, Rental Rates to Display, Supported Vehicle Types, Supported Vehicle Locations, and Email Options.

2. Edit the necessary information as described in the following sections.

Security Options Section

The **Security Options** area includes information related to the back-end application.



This section will look slightly different depending on if you are using standalone reservations or the web modules Reservations tab. The difference appears in the upper right section of the page where the **FA Reservation Source** field is located.

- If you are using the web modules Reservations tab, the area only contains the **FA Reservation Source** field as shown in the screenshot above.
- If you are using standalone reservations, the area includes the **FA Reservation Source** field, the **Home URL** field, and the **Restore Default** button as shown in the screenshot below.

Login Information

The **Require FA User for each Operator** checkbox provides restriction over making reservations. Check this box to limit reservations to only individuals with a User ID and password. To set up the Reservations portal as a standalone portal, leave this setting unchecked and set the designated user login in the Shared user Settings.

Shared User Settings

Click Share User Settings to open the pop-in for setting up a user that will be used in the standalone portal. This user will always be logged in when a user opens the shared portal. Enter a user ID and a password (and confirm the entered password), and click **Save** to set up the shared user.

FA Reservation Source

The **FA Reservation Source** field identifies, for reporting purposes, the source of any reservation completed through the web modules reservations. Examples of reasonable values for this field include web, online, and self-service. To indicate that the reservation originated from the Reservations portal, use all capital letters and type your selection in the field.

Home URL

The **Home URL** is the URL to which your users will return when they click on the **Home** button. The default **Home URL** is the Reservations Login page. Enter the desired **Home URL** for your organization such as corporate home page or Fleet Management home page URL. To return users to the initial Reservations Login page, click the **Restore Default** button.

Restore Default Button

This button displays only when using standalone Reservations. Click the **Restore Default** button to restore the default to the URL of the Reservations Login page.

Operator Permissions

- **Allow creation of new operators:** Click the checkbox (this only works if setting **Use the following FA authentication for all logins** is also set) to allow new operators to be created.



Note: This is only available when FA authentication is required as set in the Security Options section explained above.

- **Allow operators to edit OPERATOR DETAILS:** Click the checkbox to allow users to validate key information from their operator records prior to making a reservation. This practice is useful in ensuring that your operator record is up-to-date with regard to

address, email address, work phone, etc. This setting not only controls showing/hiding of the additional operators fields, but also enables rideshare functionality.



Note: The **Allow creation of new operators** checkbox must not be checked to allow operators to edit details.

- **Allow additional operators on a reservation:** Click the checkbox to allow more than one operator on a reservation.
- **Require valid operator license expiration date:** Click the checkbox to require users to have valid licenses when making reservations. The User will receive error message when trying to create reservations if this setting enabled and he has an expired license.

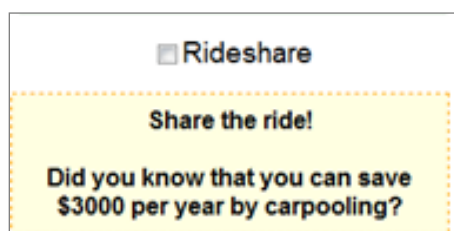
Required Fields for Login Section

This section displays only when the **Require FA User for Operator** checkbox is NOT set. The default is Operator ID. Click the checkboxes to require additional fields for login.

User Interface Definition Section

The **Interface Definition** section is where you configure the user interface. It is here that you configure cancel and thank you messages, date/time value display, and default pickup time.

The **Cancel and Thank You Messages** as well as the **Message for users making NEW reservations** are optional, custom text fields that will appear to the end user after entering, canceling, or making a new reservation. If your organization wishes to instruct its end users as to next steps, contact information, etc., you may use the Thank You Message field for that purpose. The message shown when creating a new reservation appears below the rideshare checkbox.



To set a new message:

1. Enter the messages you would like the user to see when making and canceling reservations.
 - The **Date/Time Values in 24 or 12 hour format** setting determines how the date/time values are displayed.
2. Click the drop-down arrow to select the desired display.

- The **Default pickup time – add X minutes to current time** allows you to change the default from 15 minutes to another set amount of time from now to pickup.
3. Enter the number of minutes to add to the current time for default pickup time.
 - The **Limit reservations to X days in advance** setting determines how many days in advance reservations can be made.
 4. Enter the number of days.
 - The **Maximum Days per Reservation** setting allows you to set a limit on the maximum reservation duration.
 5. Enter the number of days.

Reservation Options Section

The Reservation Options section allows you to determine specific settings for the reservations. Click the checkboxes according to your specifications.

- **Allow STANDBY reservations:** Check the checkbox to allow reservations to be made on Standby if a vehicle is not available for the date/time required. If disabled, operators will only be able to reserve available vehicle types. If enabled, operators will be able to create a STANDBY reservation if the chosen vehicle type is unavailable.
- **Allow operators:** Click to specify Account ID when making reservations checkbox to let users specify their account ID when making reservations.
- **Require confirmation response prior to processing reservation:** Click the checkbox to require a confirmation response. The user is not prompted when updating an existing reservation.

The Reservations Options section also includes the **Rental rates to display**, **Supported Vehicle Types**, and **Supported Vehicle Locations** sections as discussed below.

Rental Rates to Display

This area allows you to determine which rental rates (for **Availability Search** and **Reservation Detail**), if any, will be displayed for the user when searching for available vehicle types or rideshares (Availability Search) or the Vehicle Type Information box (Reservation Detail).

To set rental rates to display:

1. Click on the desired rental rates to be displayed when a user is searching for vehicle availability and when viewing the reservation detail.
2. Press **CTRL** while clicking on the desired rates to select more than one rate.

3. To deselect a rate, press **CTRL** and click on the rates to be deselected.

Supported Vehicle Types Section

This section allows you to restrict the Pool Vehicle Types that can be reserved by users via the Reservations Module. Note that the operator's supported vehicle types (application setting) will always influence what is displayed.

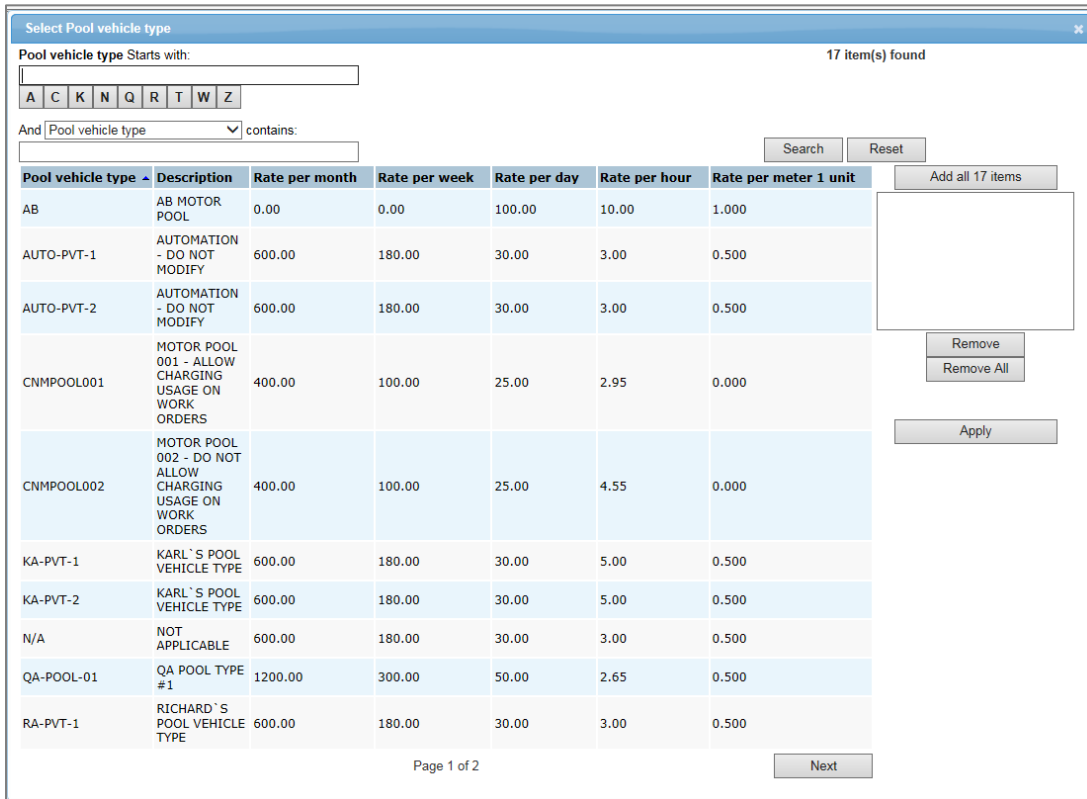
- Select the **Use FA Operator Vehicle Types** radio button to have the system only provide the vehicles that the individual is authorized to use when making a reservation.
- Select the **Use user-defined Vehicle Types** radio button for only the specified vehicle types to be displayed when making reservations (only if they are also supported by the Operator – this combines the Application setting with the Web Modules setting). NOTE: If none are specified, then this option works the same as Use FA Operator Vehicle Types.

Create a Supported Vehicle Type List for Operators

To create a list of supported vehicle types:

1. Click the **Browse**  button to select the Supported Vehicle Types from your organization's vehicle list.

The Select Vehicle Type(s) window appears where you may create a list of vehicle types.



Select Pool vehicle type

Pool vehicle type Starts with:

17 item(s) found

And Pool vehicle type contains:

Search Reset

Pool vehicle type	Description	Rate per month	Rate per week	Rate per day	Rate per hour	Rate per meter 1 unit
AB	AB MOTOR POOL	0.00	0.00	100.00	10.00	1.000
AUTO-PVT-1	AUTOMATION - DO NOT MODIFY	600.00	180.00	30.00	3.00	0.500
AUTO-PVT-2	AUTOMATION - DO NOT MODIFY	600.00	180.00	30.00	3.00	0.500
CNMPOOL001	MOTOR POOL 001 - ALLOW CHARGING USAGE ON WORK ORDERS	400.00	100.00	25.00	2.95	0.000
CNMPOOL002	MOTOR POOL 002 - DO NOT ALLOW CHARGING USAGE ON WORK ORDERS	400.00	100.00	25.00	4.55	0.000
KA-PVT-1	KARL'S POOL VEHICLE TYPE	600.00	180.00	30.00	5.00	0.500
KA-PVT-2	KARL'S POOL VEHICLE TYPE	600.00	180.00	30.00	5.00	0.500
N/A	NOT APPLICABLE	600.00	180.00	30.00	3.00	0.500
QA-POOL-01	QA POOL TYPE #1	1200.00	300.00	50.00	2.65	0.500
RA-PVT-1	RICHARD'S POOL VEHICLE TYPE	600.00	180.00	30.00	3.00	0.500

Add all 17 items

Remove Remove All

Apply

Page 1 of 2 Next

2. Click the desired vehicle types to add them to the preliminary list on the right.
3. Click **Apply** to save changes made to the preliminary list.
 - To add all vehicles in the list, click **Add all # Items** to add all the vehicles automatically to the list.
 - To remove a vehicle type from the newly created list, select the vehicle type and click the **Remove** button.
 - To remove all the vehicle types from the list, click the **Remove All** button.

Supported Vehicle Locations Section

This section allows you to restrict the Pool Vehicle Locations that can be reserved from by users via the Reservations Module. Note that the FA Operator's supported Locations (Application setting) will always influence what is displayed.

- Select the Use FA Operator Locations radio button to have the system only provide the locations that the individual is authorized to use when making a reservation.
- Select the Use user-defined Locations radio button for only specified locations to be displayed when making reservations (only if they are also supported by the operator – this combines the Application setting with the Web Modules setting).



If no locations are specified, then ALL locations will be available for reservations.

Create a Supported Vehicle Locations List for Operators

To create the list, follow the same steps as above for creating a [Supported Vehicle Type](#) List.

Email Options Section

The Email Options section allows you to tailor the Reservations Module even further.

Send Confirmation Email

You may opt to have the system send a confirmation email when users make reservations.

1. Check the **Send Confirmation Email** checkbox to send a default confirmation to the logged in operator's email address on record and to the email address provided at login.
 2. **EMAIL FROM:** Enter the Motor Pool email contact address.
- ✔ If you enable the **Send Confirmation Email**, it is necessary to ensure that Operator IDs have email addresses on the operator record. If this option is enabled, be sure to add the email address on the Operator Primary Information. If a user does not have an email address, or is not required to enter an email address at log in, an error may display when creating a new reservation.

Edit Confirmation Template Button

The **Edit Confirmation Template** button takes you to the Edit Confirmation Template popup to edit both the printer friendly and email versions of the reservation confirmation.

To delete a line from the confirmation:

1. Click **Edit Confirmation Template**.
2. Highlight the line you want to delete and press the **Delete** key.

3. Click **Save**.

To add a line to the confirmation:

1. Click **Edit Confirmation Template**.
2. Click the down arrow in the **Keywords** drop-down box.

3. Select the item from the list to add to the confirmation.

The item displays in the Keywords field.

4. Click **Insert into Message** or **Insert into Subject**.

The screenshot shows the 'Edit Confirmation Template' window. It has fields for 'Email Subject Line', 'Message Text', 'Work Phone', 'Pickup Location', 'Phone', 'Fax', 'Pickup Time', 'Return Time', 'Vehicle Type', 'Rental Rates', 'CC is', and 'Passenger Count is'. The 'Keywords' field is set to 'DRIVER LICENSE'. At the bottom, there are two buttons: 'Insert into Message' and 'Insert into Subject'. A red circle with the number '3' is around the 'Insert into Message' button.

*The item displays at the bottom of the message (if you selected **Insert into Message**) or in the Email Subject Line (if you selected **Insert into Subject**).*

The screenshot shows the 'Edit Confirmation Template' window. It has fields for 'Email Subject Line', 'Message Text', 'Work Phone', 'Pickup Location', 'Phone', 'Fax', 'Pickup Time', 'Return Time', 'Vehicle Type', 'Rental Rates', 'CC is', and 'Passenger Count is'. The 'Keywords' field is set to 'DRIVER LICENSE'. The 'Insert into Message' button is highlighted with a red box.

5. To move the line, highlight the line, and drag and drop the item in the desired location.

The item displays in the new location.

6. You may edit the template further by adding a label, formatting spacing, etc.
7. Click **Cancel** to discard the changes and return to the settings page.
8. Click **Save** to save the template.

Valid Email Domains and Domain Error Message

Valid Email Domains: This field allows you to restrict the email domains associated with making reservations.

To restrict the email domains associated with making reservations:

1. Type the valid email domain in the field.
2. Click **Add** to add it to your list of Valid Email Domains.

3. To remove one of the email domains from the list, select the one to be removed and click **Remove**.
4. Click **Remove All** to remove all the domains from your list.)



If no domains are specified, then ALL email domains will be accepted.

Domain Error Message: This field allows you to customize the message that appears when an incorrect domain is used.



Enter the message to appear upon using an incorrect domain.

Customizing the Reservations Module Header

The graphic at the top of Reservations can be customized for your organization by setting up a separate instance of the web files specifically for the standalone portal and replacing that copy of the mylogo.gif file with a .gif file of your organization's logo. The file to replace is located in the Images folder of the standalone portal instance. Be sure to keep the filename mylogo.gif when customizing the header with your organization's graphic. For the page to look right, it is recommended that the logo dimensions not exceed a width of 5 inches and a height of 0.75 inches.

4. Understanding the Reservations Module

The following section outlines how to use the Reservations Module.

Accessing Reservations

When users enter the standalone web address or click on the tab for the Reservations module, they are presented with the **User Interface Definition** fields you configured as Administrator. Required fields presented here must be completed prior to clicking the **Login** button.



Depending on your configuration, the prompts displayed on the initial Reservations page may differ. Either Email address/Operator ID prompts or User name/Password prompts will display.

Reservations Driver Details and Main Menu

Click the **Login** button to open the Main Reservations page appears. From this page, users may update driver information, make a new reservation, and view, modify, or cancel an existing reservation.

My Info Section

The **My Info** section displays all operator details as configured on the Reservations Setup page.

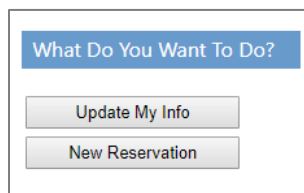
Reservations	
My Info	
Operator ID	
Name	
Department ID	
Account ID	
License Expiration Date	09/30/2026
Email Address	
Mobile Phone	
Address Line 1	
Address Line 2	
Address Line 3	
Address Line 4	
Work phone	



Reservations must end prior to the driver's license expiration date or an error will occur.

The user can update the driver details if the administrator configured the Reservations Module to allow drivers to update details on the Reservations Setup page. When configured as such, the **Update My Info** button displays in the top right portion of the page to provide drivers with updating capability. See the next section for more information about updating driver details.

What Do You Want To Do? Section



What Do You Want To Do?

Update My Info

New Reservation

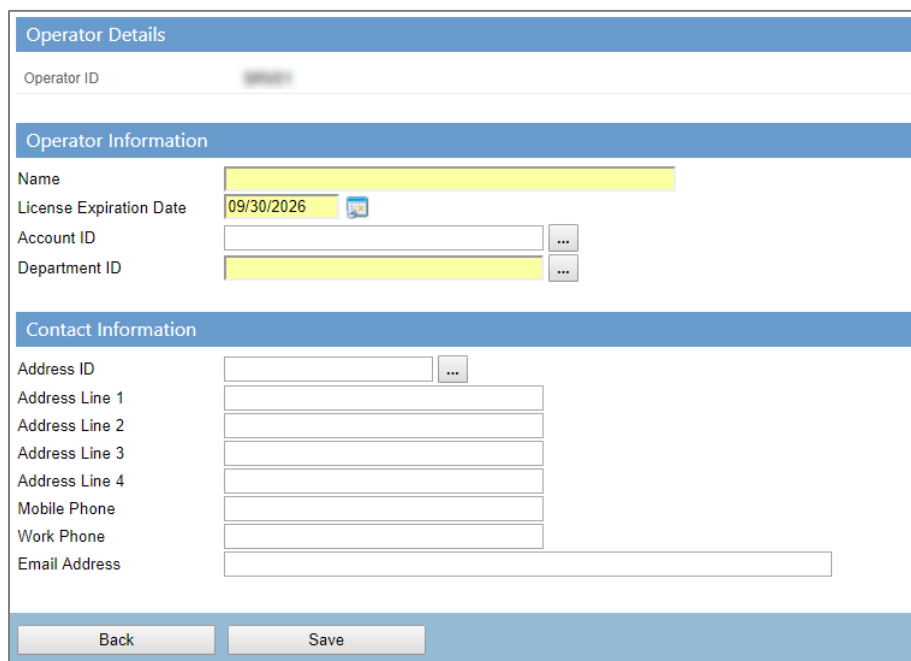
Based on module options, in this section, the user is able to select between updating their driver details, making a new reservation, or logging out of the system by clicking on the desired button.

Update My Info Button

The **Update My Info** button displays only if Reservations was set up to allow operators to edit their operator profile and contact information. When you click the **Update My Info** button, the Operator Details page displays.

Operator Details Page

Click the **Update My Info** button on the Main Reservations page to display the Operator Details page.



Operator Details

Operator ID

Operator Information

Name

License Expiration Date 09/30/2026

Account ID

Department ID

Contact Information

Address ID

Address Line 1

Address Line 2

Address Line 3

Address Line 4

Mobile Phone

Work Phone

Email Address

Back Save

On this data entry page, the operator may view and edit their operator profile information by entering the correct data and clicking **Save**. This automatically updates the Operator Employment information and **Successful Update** displays at the top of the page.



Depending on your configuration, this page will display with fields that are restricted or unrestricted for updates. The fields may be customized through UI controls.

-  A primary operator cannot create or update an existing reservation if the operator does not pass the “Validate operator testing on reservations” and Operator Test Type and Results validations on the Motor Pool Center screen in Enterprise Portal.

New Reservation Button

Click on the **New Reservation** button to create, modify, or cancel reservations, and search for and join rideshares. When you click the **New Reservation** button, the initial Reservation Information page displays. See the [Create a New Reservation](#) section below for information about making a new reservation.

Logoff Button

Click **Logoff** to logout of Reservations.

My Reservations Section

The My Reservations section of the main page provides a list of all the user’s reservations including the Reservation ID and Confirmation Code, Status, Pickup Date & Time/Return Date & Time, Vehicle Type including whether it is a rideshare (indicated by ) , and Pickup Location. During configuration, the administrator may choose the setting Allow STANDBY Reservations. If this setting is selected, STANDBY reservations also display.



Status types may include the following:

- **APPR REQD:** Dispatch has not yet approved reservation
- **COMMITTED:** Reservation has been confirmed for a specific vehicle
- **CONFIRMED:** Reservation is confirmed
- **DISPATCHED:** Vehicle is out for use and due by the return date and time
- **LATE:** Vehicle is overdue – late fees may be assessed
- **STANDBY:** Vehicle is not yet available.

	Reservation ID	Status*	Pickup Date & Time Return Date & Time	Vehicle Type	Pickup Location
	1291 Confirmation Code: 593444	CONFIRMED	01/25/2012 13:15 01/28/2012 12:30	P120 - SEDAN	1000 - FULL SERVICE SHOP
	1287 Confirmation Code: 591165	CONFIRMED	08/16/2010 12:00 08/23/2010 12:00	P120 - SEDAN 	1000 - FULL SERVICE SHOP
	1290 Confirmation Code: 888395	CONFIRMED	01/25/2012 13:25 01/27/2012 12:45	P120 - SEDAN	1000 - FULL SERVICE SHOP
	1293 Confirmation Code:	STANDBY	01/28/2012 13:15 01/31/2012 13:15	P210 - VAN - SMALL (1/4 TON TO 1/2 TON)	1000 - FULL SERVICE SHOP

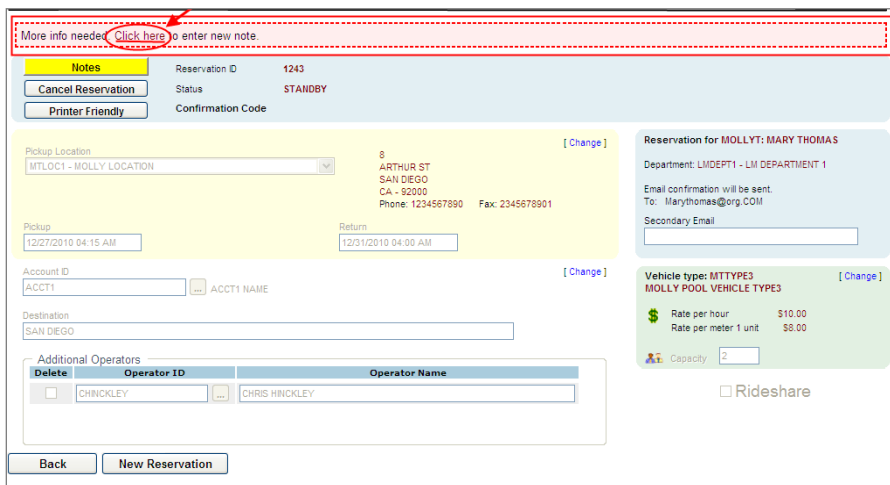
* APPR REQD: Dispatch has not yet approved reservation;
 COMMITTED: Reservation confirmed for a specific vehicle
 CONFIRMED: Reservation confirmed
 DISPATCHED: Vehicle is out for use and due by the return date and time
 LATE: Vehicle is overdue - late fee(s) may be assessed
 STANDBY: Vehicle not yet available.

Expand All Collapse All

Red Question Mark Icon

The red question mark icon displays in the far-left column of the **My Reservations** section when the **More Information Required** checkbox is checked on the **Motor Pool Center** screen.

1. Click the red question mark icon takes you to the Reservation Detail page with a **Click here** link to the **Notes** pop in where you may enter the additional information.



More info needed. Click here to enter new note.

Notes

Cancel Reservation

Printer Friendly

Reservation ID: 1243

Status: STANDBY

Confirmation Code

Pickup Location: MTLOC1 - MOLLY LOCATION

8 ARTHUR ST
SAN DIEGO
CA - 92000
Phone: 1234567890 Fax: 2345678901

Pickup: 12/27/2010 04:15 AM

Return: 12/31/2010 04:00 AM

Account ID: ACCT1

Destination: SAN DIEGO

Additional Operators

Delete	Operator ID	Operator Name
☐	CHINCKLEY	CHRIS HINCKLEY

Back New Reservation

Reservation for MOLLYT: MARY THOMAS

Department: LMDEPT1 - LM DEPARTMENT 1

Email confirmation will be sent.
To: Marythomas@org.COM

Secondary Email

Vehicle type: MTTYPE3

MOLLY POOL VEHICLE TYPE3

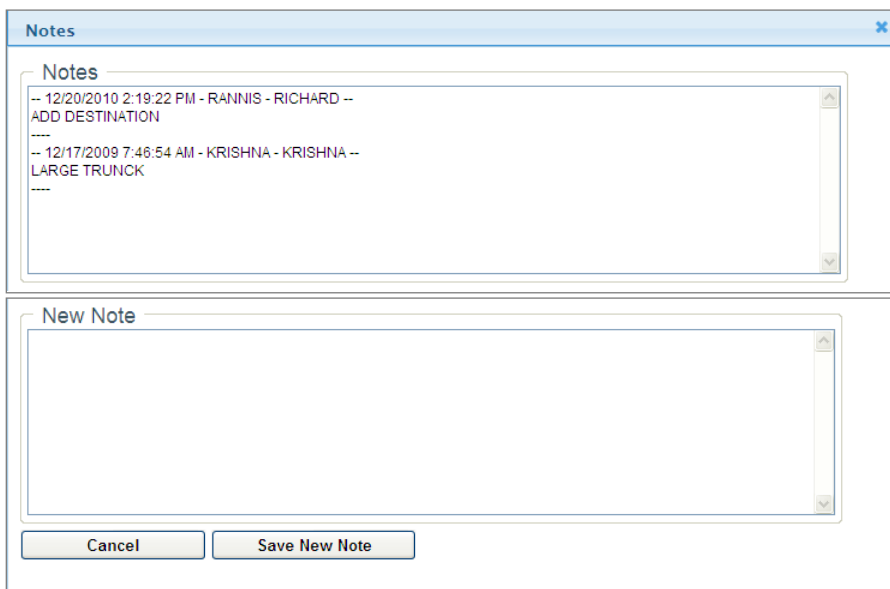
Rate per hour: \$10.00

Rate per meter 1 unit: \$8.00

Capacity: 2

☐ Rideshare

The Notes pop-in displays.



Notes

Notes

-- 12/20/2010 2:19:22 PM - RANNIS - RICHARD --
ADD DESTINATION

-- 12/17/2009 7:46:54 AM - KRISHNA - KRISHNA --
LARGE TRUCK

New Note

Cancel Save New Note

2. Enter a new note and click the **Save New Note** button to save the note.

This subsequently removes the red question mark icon from the reservation column on the Main Reservation page.

Notes

Notes

- 12/20/2010 2:19:22 PM - RANNIS - RICHARD -- ADD DESTINATION
- 12/17/2009 7:46:54 AM - KRISHNA - KRISHNA -- LARGE TRUNCK

New Note

San Francisco

Cancel Save New Note

You are returned to the Reservations Detail page. See the [Reservations Detail Page](#) section for more information about this page.

Expand and Collapse Buttons (+/-)

The + (expand) button to display additional operators on the reservation (if settings allow additional operators). Likewise, the - (collapse) button hides the additional operators from view.

The following is a screenshot showing the expanded view of the My Reservations list.

My Reservations

Reservation ID	Status*	Pickup Date & Time Return Date & Time	Vehicle Type	Pickup Location
1290 Confirmation Code: 888395	CONFIRMED	01/25/2012 13:25 01/27/2012 12:45	P120 - SEDAN	1000 - FULL SERVICE SHOP
1294 Confirmation Code: 670754	CONFIRMED	01/26/2012 14:30 01/28/2012 14:30	P120 - SEDAN	1000 - FULL SERVICE SHOP
Operator ID Operator Name				
1000-02	JANE MORRISON			
1000-05	JERRY ROBERTS			
194610611	JOHN HARTMANN			
1293 Confirmation Code:	STANDBY	01/28/2012 13:15 01/31/2012 13:15	P210 - VAN - SMALL (1/4 TON TO 1/2 TON)	1000 - FULL SERVICE SHOP
Operator ID Operator Name				
1000-01	JACK JOHNSON			

* APPR REQD: Dispatch has not yet approved reservation.
 COMMITTED: Reservation confirmed for a specific vehicle
 CONFIRMED: Reservation confirmed
 DISPATCHED: Vehicle is out for use and due by the return date and time
 LATE: Vehicle is overdue - late fee(s) may be assessed
 STANDBY: Vehicle not yet available;

Expand All Collapse All

- In the expanded view, if you are not the primary operator on a reservation, the primary operator will be indicated by an asterisk in the Primary column.

Reservation ID	Status*	Pickup Date & Time Return Date & Time	Vehicle Type	Pickup Location
1294 Confirmation Code: 670754	CONFIRMED	01/26/2012 14:30 01/28/2012 14:30	P120 - SEDAN	1000 - FULL SERVICE SHOP
Operator ID Operator Name				
Primary *	1000	MARY SMITH		
	1000-05	JERRY ROBERTS		
	194610611	JOHN HARTMANN		

- Hover over the asterisk to see the Primary Operator's Contact Information as shown below.

My Reservations

	Reservation ID	Status*	Pickup Date & Time Return Date & Time	Vehicle Type	Pickup Location
1294	Confirmation Code: 670754	CONFIRMED	01/26/2012 14:30 01/28/2012 14:30	P120 - SEDAN	1000 - FULL SERVICE SHOP
Primary	Operator ID Operator Name 1000: MARY SMITH Contact Info Phone: 888-121-1212 Email: NAME@MYCOMPANY.COM				

The following screenshot shows a Collapsed View of the My Reservations list.

My Reservations

	Reservation ID	Status*	Pickup Date & Time Return Date & Time	Vehicle Type	Pickup Location
?	1291	CONFIRMED	01/25/2012 13:15 01/28/2012 12:30	P120 - SEDAN	1000 - FULL SERVICE SHOP
	1287	CONFIRMED	08/16/2010 12:00 08/23/2010 12:00	P120 - SEDAN	1000 - FULL SERVICE SHOP
	1290	CONFIRMED	01/25/2012 13:25 01/27/2012 12:45	P120 - SEDAN	1000 - FULL SERVICE SHOP
1293	Confirmation Code: 888395	STANDBY	01/28/2012 13:15 01/31/2012 13:15	P210 - VAN - SMALL (1/4 TON TO 1/2 TON)	1000 - FULL SERVICE SHOP

* APFR REQD: Dispatch has not yet approved reservation;
 COMMITTED: Reservation confirmed for a specific vehicle
 CONFIRMED: Reservation confirmed
 DISPATCHED: Vehicle is out for use and due by the return date and time
 LATE: Vehicle is overdue - late fees(s) may be assessed
 STANDBY: Vehicle not yet available;

Expand All Collapse All

Reservations ID Link

In the Reservation ID column of the My Reservations area, the reservation ID is a link to the Reservation Detail page. Clicking this link takes the user to the Reservation Detail page so they may view, modify, cancel, print, or add notes to the selected reservation. See the [Reservation Detail Page](#) section for more information about this page.

Confirmation Code

In the Reservation ID column of the My Reservations area, the confirmation code is displayed so you have access to your confirmation code while you still have the vehicle. This can help you when returning your key to the key box if using KeyValet.

Create a New Reservation

When you click the **New Reservation** button on the Main Reservation page, the initial Reservation Information page displays as shown below.

Pickup Location
MTLOC1 - MOLLY LOCATION

8 ARTHUR ST
SAN DIEGO
CA - 92000
Phone: 1234567890 Fax: 2345678901

Reservation for MOLLY: MARY THOMAS
 Department: LIODEPT1 - LM DEPARTMENT 1
 Email confirmation will be sent.
 To: Marythomas@org.COM
 Secondary Email

Pickup *
12/19/2010 15:25

Return *
12/19/2010 15:25

Back

To create a new reservation, complete the following steps.

1. **Pickup Location:** Select a location from the dropdown list.

- The dropdown is a list of locations that operator supports, based on application settings and web module settings.
 - If module settings are set to use FA operator locations, then only those locations are considered.
 - If module settings are set to use user-defined locations, then the supported locations includes the user-defined locations list, but only those locations that the FA Operator supports.
 - In other words, FA Operator supported locations are ALWAYS considered, but the module settings may restrict those locations further.
- Defaults to preferred location, if defined (Application - Operator Details)
- The currently selected location's address/phone/fax is displayed, and will be updated via AJAX if selected location changes.

2. Pickup: Enter the date/time manually or with the calendar selector.

- Date and time that vehicle will be picked up.
 - Defaults to X minutes from now (rounded to nearest five minutes) where X is configured via web module settings (Default Value = 15 minutes).

3. Return: Enter the date/time manually or with calendar selector.

- Date and time that vehicle will be returned.
 - Defaults to same value as pickup date/time to keep calendars in sync.



Note: Setting pickup date to a date later than the return date will default the return date to the pickup date.

4. Secondary Email: Enter email if desired.

- Used to display/modify the additional email address to which email notifications may be sent.
- This field is only visible if email confirmation is enabled (via Web Module settings).
- Email notifications will be sent upon reservation creation, modification, and cancellation, and will be sent to the operator's email address (if any), and any email addresses in the **Secondary email** field (which could be a comma separated list of addresses, if desired).



The system does **NOT** validate email addresses. If there are any problems with the string of email addresses (badly formed addresses, inappropriate characters, etc.), then email notifications will not be sent. The user will be informed of any problems with the email server/email addresses, but not until AFTER the reservation has been saved. So in the case

of email error during cancellation or creation, no emails will be sent. However, in the case of modification, the user may attempt the modification again (with corrected CC: email address) to resend the email notification.

Based on the selected location, and the pickup/return time range, the system will display the available vehicle types, and rideshares for that time window (including those that the operator has already created or joined).

The screenshot shows a reservation form for 'MOLLY2: MARY THOMAS'. It includes fields for Pickup Location (MTLOC1 - MOLLY LOCATION), Pickup time (12/30/2010 03:15 PM), and Return time (01/04/2011 03:15 PM). A 'Back' button is visible. Below the form, there are two sections: 'TYPES AVAILABLE TO RESERVE' and 'JOIN A RIDESHARE'. The 'TYPES AVAILABLE TO RESERVE' section lists 'MTTYPE1' (MOLLY POOL VEHICLE TYPE1) with a capacity of 3, a rate of \$10 / hour and \$38 / day, and a 'Select' button. The 'JOIN A RIDESHARE' section shows a destination of DALLAS, with dates from Thu, Dec 30, 2010 12:00 PM to Tue, Jan 04, 2011 12:00 PM, and a 'Join' button. A 'Show More' link is also present under the vehicle types section.

5. Select a vehicle for the reservation **OR** join a rideshare.

Skip to the [Select a Vehicle](#) or the [Join a Rideshare](#) sections below to learn about completing your new reservation based on your preference as well as vehicle and rideshare availability.

Select a Vehicle

Once you have entered the reservation pickup location and timeframe, the **Types Available to Reserve** area of the Create a Reservation page will list available vehicles based on the timeframe entered.

This screenshot shows the 'TYPES AVAILABLE TO RESERVE' section. It lists 'MTTYPE1' (MOLLY POOL VEHICLE TYPE1) with a capacity of 3, a rate of \$10 / hour and \$38 / day, and a 'Select' button. A 'Show More' link is also present.

Types Available to Reserve

If the operator has a preferred vehicle type, and if that type is available, then only that type will show (as indicated by the **star**  **icon** next to the vehicle type ID).

1. To see other available types and unavailable types, click **Show More** link.

This screenshot shows the 'TYPES AVAILABLE TO RESERVE' section, similar to the previous one, but with the 'Show More' link highlighted by a red circle and a red arrow pointing to it.

The **Unavailable Types** list shows all the vehicles that may be reserved as **STANDBY**.

TYPES AVAILABLE TO RESERVE		
MTTYPE1★ MOLLY POOL VEHICLE TYPE1	Capacity: 3	\$10 / hour \$38 / day Select

UNAVAILABLE TYPES		
CH-01 TEST	Capacity: 0	\$12 / hour \$0 / day Select
CH-02 TEST	Capacity: 0	\$12 / hour \$0 / day Select
CH-03 TEST	Capacity: 0	\$12 / hour \$0 / day Select

JOIN A RIDESHARE	
Destination: DALLAS From: Thu, Dec 30, 2010 12:00 PM To: Tue, Jan 04, 2011 12:00 PM	Join

If the operator does not have a preferred type, or if the preferred type is not available for that location/date range, the **Unavailable Types** list automatically shows the vehicles available for **STANDBY** as shown in the screenshot below.

TYPES AVAILABLE TO RESERVE		
VEHICLE MINIVAN - 3 DOOR MOTOR POOL VEHICLE	Capacity: 6	\$120.00 / week \$400.00 / month Select

UNAVAILABLE TYPES		
LMMPTTRUCK MOTOR POOL VEHICLE - TRUCK	Capacity: 0	\$0.00 / week \$0.00 / month Select
LM-MP-TYPE03 MOTOR POOL RENTAL TYPE 03 - APPR REQD	Capacity: 4	\$0.00 / week \$0.00 / month Select
RATE2 COMPACT CAR	Capacity: 5	\$150.00 / week \$500.00 / month Select
SEDAN FORD CROWN VICTORIA MOTOR POOL CAR - 4 DR	Capacity: 6	\$120.00 / week \$400.00 / month Select

JOIN A RIDESHARE	
Destination: ALBANY From: Mon, Nov 01, 2010 03:25 PM To: Tue, Nov 16, 2010 03:15 PM	Join
Destination: ALBANY From: Thu, Nov 18, 2010 03:30 PM To: Fri, Nov 19, 2010 03:30 PM	Join

- Click **Select** to select a vehicle.

Pickup Location 1000 - FULL SERVICE SHOP	3463 MAIN STREET PALOS VERDES CA 90281 Phone: 463-771-1827 Fax: 246-381-8714	Reservation for 1000: MARY SMITH Department: 1000 - MOTORPOOL DEPARTMENT Email confirmation will be sent. To: NAME@MYCOMPANY.COM CC:
Pickup 08/07/2013 15:15	Return 08/09/2013 15:15	
Back		
TYPES AVAILABLE TO RESERVE P120★ SEDAN Capacity: 0 Select		JOIN A RIDESHARE No rideshares available at the selected pickup location for the above dates.
Show More		

The Additional Information page displays.

 The Pickup Location, Pickup and Return Dates, and the Vehicle information may be edited by clicking the **[Change]** links.

3. Enter the following (*OPTIONAL*) information:

- Account ID
 - Defaults to the operator's Account ID, if defined (based on preferred location).
 - Only editable if the operator is allowed to edit the Account ID (via Web Module settings) – otherwise, the field is read only. If editable, the Account ID textbox and choice-list is useable.
- Work Order ID and Task ID

- Enter the work order and task ID information to associate it with the reservation.



Note: These fields are only visible if **Allow charging usage on work orders** is set on the Pool Vehicle/Resource Types screen.

The screenshot shows the 'Pool Vehicle/Resource Types' admin interface. The 'Basic Info' tab is selected. The 'Allow charging usage on work orders' checkbox is highlighted with a red circle. The interface includes a sidebar with tabs: Basic Info, Availability Adjustment, Rental Rates, Other Types, Supported Locations, and Statistics. The main content area has fields for Description, Screen message, Print message, Capacity - maximum number of passengers, Outside rental agency vehicle type, Rental agency ID, Active, and Allow charging usage on work orders. There is also an 'Associated file' section with fields for Path and file name and Description.

- Destination
 - Plain text description of the destination.
- Reservation Note
 - Entering a note here will post an optional note to the reservation when it is created. Notes may also be added after the reservation is created.
- Capacity
 - Capacity defaults to the number of passengers (or seats) in the vehicle, as defined by the Vehicle Type itself. It may be changed by the user, but changes are not validated by the Web Module.
 - The capacity value affects how many additional operators can be added. Once the number of additional operator rows is equal to or greater than the capacity minus one, the user will not be able to add more operators until capacity is increased (primary operator is always included as a passenger).

Example: If Capacity is set at three, then the number of seats available is two (capacity minus one seat for the operator), so the user will only be able to add two additional operators.

- If the user increases the capacity to five, then she will be able to add up to four additional operators.
 - If the capacity is decreased, then any additional operators already entered will not be removed, even if the number of operators exceeds the number of available seats. In this case, it will not be possible to add more operators, if already at the limit for number of seats.
- Additional Operators
 - This area is only visible/editable if additional operators are allowed on the reservation (via Web Module settings). Note that the above setting also controls whether Rideshare is supported. If additional operators are NOT allowed, then it will not be possible to create/search/join rideshares via the Web Module.
 - Operators can be entered by either ID or Name (will lookup Name from ID, and vice-versa).
 - See *Capacity* rules above for usage explanation. Note that even if DELETE is checked, the user will not be able to add operators if the vehicle is already at capacity. In this case, the user will be required to CHANGE Operator IDs rather than delete and add (although delete and add is possible, it may require multiple steps, and is not recommended).
 - Rideshare flag
 - This flag indicates that the reservation is a Rideshare, in which case other operators will be able to search, view, and join the reservation as additional operators. Note that these other operators will not be able to modify reservation details, and will not be able to view the confirmation code. **The primary operator is 100% responsible for the reservation, and for the costs of reservation/rental.**
4. After completing the above information, select the desired action from the buttons on the bottom of the page. Actions available include the following:
- **Back:** Click the **Back** button to go back to the previous step.

Pickup Location: 1000 - FULL SERVICE SHOP [Change]

3463 MAIN STREET
PALOS VERDES
CA
90281
Phone: 463-771-1827 Fax: 246-381-8714

Reservation for 1000: MARY SMITH
Department: 1000 - MOTORPOOL DEPARTMENT
Email confirmation will be sent.
To: NAME@MYCOMPANY.COM
CC:

Pickup: 08/07/2013 15:15 Return: 08/09/2013 15:15

Account ID: 1000-01 [ALL OPERATIONS]

Work Order ID: 1000 [2011] 1 Task ID: 15083 [R/R STEERING WHEEL]

Destination: DALLAS

Reservation Note: NEED LARGE TRUNK

Additional Operators

Delete	Operator ID	Operator Name
☐	1000-04	SAM ADAMS
☐		

Vehicle type: P120 SEDAN [Change]
Capacity: 3
☐ Rideshare

Back Cancel Confirm

- Any entered values will be saved, but may change if a different set of dates or vehicle types is chosen. Note that since the available vehicle types and rideshares is based on location and date, it is not possible to only change the location or date without choosing the vehicle type again.
- **Cancel**: Click this button to abandon the reservation and go to the previous page. A dialog box prompts you that you will lose unsaved changes.

Pickup Location: 1000 - FULL SERVICE SHOP [Change]

3463 MAIN STREET
PALOS VERDES
CA
90281
Phone: 463-771-1827 Fax: 246-381-8714

Reservation for 1000: MARY SMITH
Department: 1000 - MOTORPOOL DEPARTMENT
Email confirmation will be sent.
To: NAME@MYCOMPANY.COM
CC:

Pickup: 08/07/2013 15:15 Return: 08/09/2013 15:15

Account ID: 1000-01 [ALL OPERATIONS]

Work Order ID: 1000 [2011] 1 Task ID: 15083 [R/R STEERING WHEEL]

Destination: DALLAS

Reservation Note: NEED LARGE TRUNK

Additional Operators

Delete	Operator ID	Operator Name
☐	1000-04	SAM ADAMS
☐		

Vehicle type: P120 SEDAN [Change]
Capacity: 3
☐ Rideshare

Back Cancel Confirm

- **Confirm**: Click **Confirm** to try to create or update the reservation.

Pickup Location: 1000 - FULL SERVICE SHOP [Change]

3463 MAIN STREET
PALOS VERDES
CA 90281
Phone: 463-771-1827 Fax: 246-381-8714

Reservation for 1000: MARY SMITH
Department: 1000 - MOTORPOOL DEPARTMENT
Email confirmation will be sent.
To: NAME@MYCOMPANY.COM
CC:

Pickup: 08/07/2013 15:15 Return: 08/09/2013 15:15

Account ID: 1000-01 [ALL OPERATIONS]

Work Order ID: 1000 [2011] 1 Task ID: 15083 [R/R STEERING WHEEL]

Destination: DALLAS

Reservation Note: NEED LARGE TRUNK

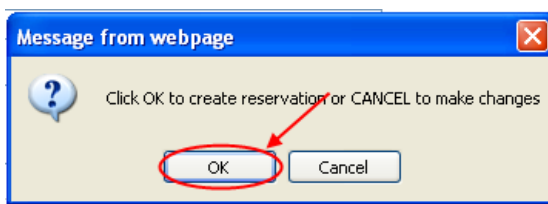
Additional Operators

Delete	Operator ID	Operator Name
☐	1000-04	SAM ADAMS
☐		

Vehicle type: P120 SEDAN [Change]
Capacity: 3
☐ Rideshare

Back Cancel **Confirm**

If this is a new reservation, and if the module setting **Require confirmation response prior to processing reservation** is enabled, the user is prompted to create the reservation.



- Any errors will be displayed to the user so they can be corrected.

If the module setting **Allow STANDBY reservations** is enabled, AND if the selected vehicle type is not available, the user may be prompted to make a STANDBY reservation. (The user may also, at this time, choose to change the reservation before creating it).

- If successful, the page will refresh and user will see the confirmation number and saved reservation details. A red box also displays the user-defined *Thank you message*, if defined (via Web Module settings). If there are any errors, they are displayed in the red box.

New reservation 1296 saved with status CONFIRMED.

Notes
 Cancel Reservation
 Printer Friendly

Reservation ID: 1296
 Status: CONFIRMED
 Confirmation Code: 477370

Pickup Location: 1000 - FULL SERVICE SHOP [Change]
 3463 MAIN STREET
 PALOS VERDES
 CA
 90281
 Phone: 463-771-1827 Fax: 246-381-8714

Pickup: 08/07/2013 15:15
 Return: 08/09/2013 15:15

Account ID: 1000-01 ALL OPERATIONS [Change]
 Work Order ID: 1000 Task ID: 15083 R/R STEERING WHEEL
 Destination: DALLAS

Reservation for 1000: MARY SMITH
 Department: 1000 - MOTORPOOL DEPARTMENT

Vehicle type: P120 SEDAN [Change]
 Rate per month: \$0.00
 Rate per week: \$0.00
 Rate per day: \$15.00
 Rate per hour: \$0.00
 Rate per meter 1 unit: \$0.00
 Capacity: 3

Back New Reservation

- Clicking the **Back** button on this page returns you to the Main Reservations page where the newly created reservation shows in the My Reservations list as shown below.

Reservations

My Info
 Operator ID: 1000
 Name: MARY SMITH
 Address Line 1: 233 BROADWAY AVE Address Line 2: CERRITOS
 Department ID: 1000 Address Line 3: CA
 Account ID: 1000-01 Address Line 4: 00282
 License Expiration Date: 08/31/2015 Work phone: 888-121-1212
 Email Address: NAME@MYCOMPANY.COM

What Do You Want To Do?
 New Reservation

My Reservations

Reservation ID	Status*	Pickup Date & Time	Return Date & Time	Vehicle Type	Pickup Location
1296 Confirmation Code: 477370	CONFIRMED	08/07/2013 15:15	08/09/2013 15:15	P120 - SEDAN	1000 - FULL SERVICE SHOP

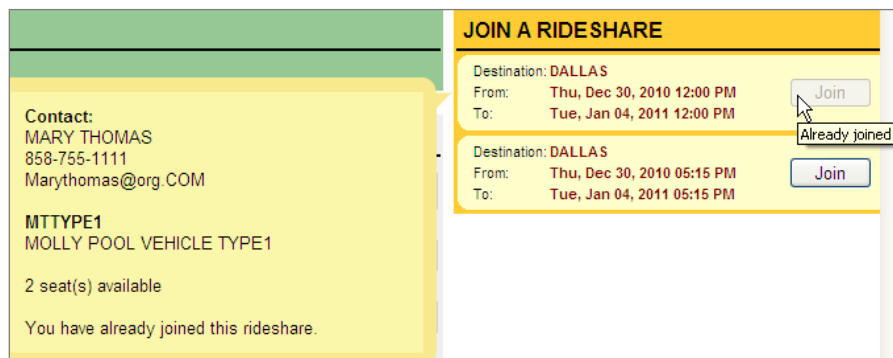
* APPRO REGD: Dispatch has not yet approved reservation;
 COMMITTED: Reservation confirmed for a specific vehicle
 CONFIRMED: Reservation confirmed
 DISPATCHED: Vehicle is out for use and due by the return date and time
 LATE: Vehicle is overdue - late fee(s) may be assessed
 STANDBY: Vehicle not yet available

If this is an existing reservation, then any changes will be saved.

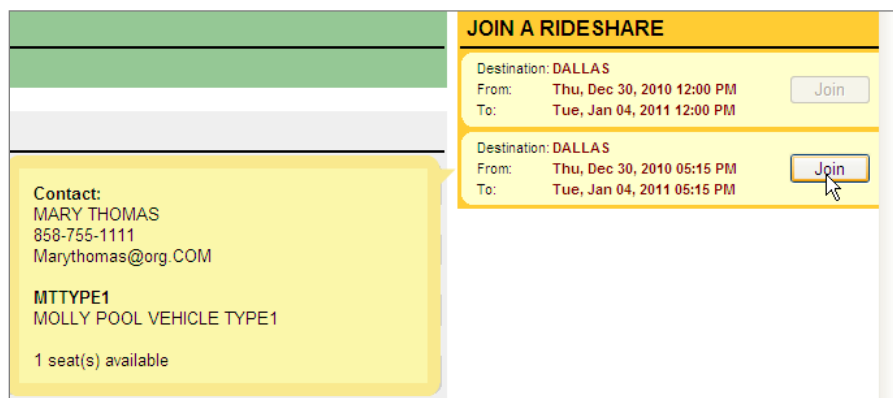
- On a successful create or update, if the module setting **Send Confirmation Email** is enabled, the system will attempt to email the operator and the address in the **Secondary Email:** field (if any).
- If this reservation was in STANDBY status (and does not need an approval), and there is now a vehicle ready for the reservation, the reservation will be set to CONFIRMED.
- If there are any problems sending the email confirmation, then the email will not be sent, and the user will be notified of the error. Please refer to the [Reservations Portal Settings](#) section for more information about the email options, including Valid Email Domains.

Join a Rideshare

When an operator creates a rideshare reservation, he is automatically joined to that rideshare and the **Join** button is disabled. Hovering over the **Join** button displays **Already Joined**, and the rideshare details indicate the operator has already joined the rideshare.

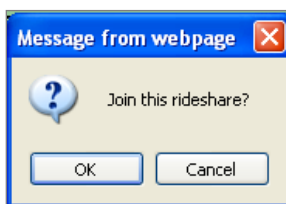


Hovering or tabbing over a rideshare item will reveal the rideshare details, including the **Contact** (Primary Operator), **Vehicle Type**, and **Number of Seats Available**. It will not display the names of the other passengers in the rideshare.



1. To join a rideshare, click the **Join** button.

A dialog box verifies that the user wishes to join the rideshare.



2. Select **OK** to join the rideshare.

The page will refresh and the user sees the rideshare view of the Reservation Detail page which includes the list of other operators and an option to leave the rideshare.

Notes | Reservation ID: MTLOC1-2010-000008 | Rideshare Contact Name: MARY THOMAS
 Status: CONFIRMED | Email: Marythomas@org.COM | Phone: 858-755-1111

Pickup Location: MTLOC1 - MOLLY LOCATION | 8 ARTHUR ST, SAN DIEGO, CA - 92000, Phone: 1234567890, Fax: 2345678901

Pickup: 12/30/2010 05:15 PM | Return: 01/04/2011 05:15 PM

Account ID: ACCT1 | ACCT1 NAME

Destination: DALLAS

Additional Operators

Delete	Operator ID	Operator Name
☐	AFOPER	AARON
☐	MOLLYT	MARY THOMAS

Reservation for MOLLYT: MARY THOMAS
 Department: LMDEPT1 - LM DEPARTMENT 1
 Email confirmation will be sent. To: Marythomas@org.COM
 Secondary Email:

Vehicle type: MTTYPE1 MOLLY POOL VEHICLE TYPE1
 Rate per hour: \$10.00
 Rate per meter 1 unit: \$8.00
 Capacity: 0

☒ Rideshare | **Leave Rideshare**

Back | **New Reservation**

For more information about the Reservation Detail page, please refer to the [Reservation Detail Page](#) section below.

Reservation Detail Page

After clicking the Reservation ID on the Reservations main page or joining a rideshare, the Reservation Detail page displays with the specifics for the reservation. This is where the user may create, view, modify, cancel, print, or add notes to reservations. This section outlines the features of the Reservation Detail page for a reservation you have created as well as a rideshare reservation you have joined. Not all combinations of application and module options are covered. However, they are discussed where they have an effect.

Reservation You Have Created

The following screenshot shows a sample Reservation Detail page for a rideshare reservation you have created (where the operator is the Primary Contact for the rideshare).

Home | **Res** | **Admin** | **Logout**

Notes | Reservation ID: MSTLOC-2009-000003 | Rideshare Contact Name: MARY THOMAS
 Status: CONFIRMED | Email: Marythomas@org.COM | Phone: 858-755-1111
 Confirmation Code

Pickup Location: MTLOC1 - MOLLY LOCATION | 8 ARTHUR ST, SAN DIEGO, CA - 92000, Phone: 1234567890, Fax: 2345678901

Pickup: 12/30/2010 12:00 PM | Return: 01/04/2011 12:00 PM

Account ID: ACCT1 | ACCT1 NAME

Destination: DALLAS

Additional Operators

Delete	Operator ID	Operator Name
☐	CHINCKLEY	CHRIS HINKLEY

Reservation for MOLLYT: MARY THOMAS
 Department: LMDEPT1 - LM DEPARTMENT 1
 Email confirmation will be sent. To: Marythomas@org.COM
 Secondary Email:

Vehicle type: MTTYPE1 MOLLY POOL VEHICLE TYPE1
 Rate per month: \$500.00
 Rate per week: \$190.00
 Rate per day: \$35.00
 Rate per hour: \$10.00
 Rate per meter 1 unit: \$8.00
 Capacity: 4

☒ Rideshare | **Leave Rideshare**

Back | **New Reservation**

For the above scenario, the following **Action** buttons are available on the Reservation Detail page:

Notes Button

Click this button to view or add notes.

Cancel Reservation Button

Click this button to cancel this reservation. This button is only visible to the reservation creator (primary operator). If it is successful, the page refreshes and shows the reservation in canceled status. The user-defined *Cancel Message* is displayed, if it was defined (via the Web Module setting).



A cancellation charge may be incurred depending on Application settings.



After the user leaves the page, it is not possible to view a canceled reservation again through the portal. If it fails, the error message will display.

Printer Friendly Button

Click this button to show printer friendly output (based on the Email Confirmation Template in the Web Module settings).

[Change]

Clicking this link allows the user to change location, dates, vehicle type, or change **Additional Info** (depending on the context).

Back Button

Click this button to go back to the previous page.

New Reservation Button

Click this button to begin creating a new reservation as outlined in the Create a New Reservation section.

The sections of the page provide information as outlined below:

Reservation Header

This section provides reservation information including:

- Reservation ID
- Status
- Confirmation Code – The confirmation code is only visible to the reservation creator (primary operator).

Rideshare Contact

The rideshare contact information only shows for rideshares and is visible to members of the rideshare. The following information displays:

- Contact information for the primary operator including Name, Email (mailto: hyperlink), and Phone.

Operator Information

Pertinent information about the currently logged in operator displays including:

- Reservation for - Current operator's ID: Name
- Department - Current operator's Department ID - Name
- Email information - Shows operator's email address and optional CC: field (which is only visible if email confirmation is sent (via the Web Module settings)).

Rideshare Reservation You Have Joined

The following screenshot shows a sample Reservation Detail page for a rideshare reservation you have joined (a reservation where the operator is **NOT** the Primary Contact for the reservation).

Home Res Admin Logoff

Notes
Printer Friendly

Reservation ID: MTLOC1-2010-000010
Status: CONFIRMED

Rideshare Contact Name: MARY THOMAS
Email: Marythomas@org.COM
Phone: 858-755-1111

Pickup Location: MTLOC1 - MOLLY LOCATION
8 ARTHUR ST
SAN DIEGO
CA - 92000
Phone: 1234567890 Fax: 2345678901

Pickup: 12/21/2010 12:20 PM
Return: 12/22/2010 11:15 AM

Account ID: ACCT1
ACCT1 NAME

Destination: DALLAS

Additional Operators

Delete	Operator ID	Operator Name
☐	AFOPER	AARON
☐	MOLLYT	MARY THOMAS

Reservation for MOLLYT: MARY THOMAS
Department: LMDEPT1 - LM DEPARTMENT 1
Email confirmation will be sent.
To: Marythomas@org.COM
Secondary Email:

Vehicle type: MTTYPE1
MOLLY POOL VEHICLE TYPE1

Rate per month	\$500.00
Rate per week	\$190.00
Rate per day	\$35.00
Rate per hour	\$10.00
Rate per meter 1 unit	\$8.00

Capacity: 3

☒ Rideshare

Leave Rideshare

Back New Reservation

For the above scenario, the following **Action** buttons are available on the Reservation Detail page:

Notes Button

Click this button to view or add notes.

Printer Friendly Button

Click this button to show printer friendly output (based on the Email Confirmation Template in the Web Module settings).

Leave Rideshare Button

Click this button to quit the rideshare. Your Operator ID is removed from the list of additional operators.

Back Button

Click this button to go back to the previous page.

New Reservation Button

Click this button to start the Create a New Reservation process.

Appendix A. Setting up a Standalone Portal

The Reservations portal can be set up as a standalone site for users without a system login. It can then be used like a kiosk station where users can enter reservations. To use the portal as a standalone site, an administrator must set up the shared user settings with an access user login that will be used for anyone accessing the system to make reservations.

After the standalone portal is set up, the only requirement from a user trying to make a reservation is to know the URL for the website.



When using Reservations as a standalone portal (kiosk), to prevent users from accessing anything beyond the standalone portal, locate the file `WebDesktopDefault.aspx` (in the Web Modules root directory) and prevent access to it by right-clicking on the file, going to "Security" tab, and denying access to the USERS group (effectively blocking access from all users of the computer).



The following processes are for organizations that allow users outside of their system to make reservations.

Configuring Reservations as a Standalone System

Use the following process to access the Reservations portal setup page for the initial setup and any subsequent changes.

To access the Vehicle Reservations Settings page:

1. Enter the following URL. Replace the hostname and alias bracketed text and enter the rest of the URL as shown. Alias refers to the name given to your Web Modules web instance.

`http://<hostname>/<alias>/FAReservationsPortal/EditReservationsPortal.aspx`

This URL opens the Administrator Login page.

FA Administrator Login required

User ID

Password

Login Cancel



- It is recommended to set the **Authentication timeout** value in the Configurator for standalone Reservations to 20 minutes.
2. Complete the fields with your user ID and password.
3. Click **Login**.

The Vehicle Reservations Settings Page displays.

Security Options

☐ Require FA User for each Operator

Shared User Settings

FA Reservation Source:

Home URL:

Operator Permissions

☒ Allow creation of new operators (applies to Use the following FA authentication for all logins)

☒ Allow operators to edit OPERATOR DETAILS

☒ Allow additional operators on a reservation

☒ Require valid operator license expiration date

Required Fields for Login

Used only when Require FA User for each Operator is NOT set

☒ Operator ID

☐ Email Address

☐ Department ID

User Interface Definition

Cancel Message:

Thank You Message:

Message for users making NEW reservations:

Date/Time Values in 24 hour or 12 hour format:

Default pickup time - add X minutes to current time: (default = 15)

To allow users who do not exist in the system to make reservations:

1. Click **Shared User Settings**.

The Shared User Settings pop-in displays.

Shared User Settings [X]

User ID:

Password:

Confirm Password:

2. Enter the **User ID**, **Password**, and **Confirm Password** fields with the user information that reservations will be logged with for anonymous users. This is the user that is logged in when someone opens the standalone Reservations portal.
3. Click **Save**.

The pop-in closes.

4. Check the **Allow creation of new operators** (this only works if you have set up a user in the Shared User Settings) checkbox. This allows users to create new operators for logging reservations.
5. Check the **Allow operators to edit OPERATOR DETAILS** checkbox. This allows operators to add their information if it does not already exist in the system.
6. Click the Use user-defined Vehicle Types radio button.
7. Click the Use user-defined Locations radio button.
8. Set any other settings on this page as needed. Refer to the [Vehicle Reservation Settings Page](#) section for more information.

To finish setting up the Reservations standalone portal:

1. Once the Reservations Module configuration is complete, click **Save**.

The Main Reservations page displays.

2. To access standalone Reservations from the web, use the following URL:
<http://<hostname>/<alias>/FAReservationsPortal/ReservationLogin.aspx>. Web Modules Reservations allows flexibility through embedding the URL within your existing corporate website, linking to it from existing web pages, or distributing the URL directly to the end users.