

Loaner Vehicle Request and Inventory Management Project

Business Requirements and Goals

The various contractors who need a loaner vehicle would like to be able to automate the process of requesting vehicles from the vehicle warehouse. They would like to move away from the current manual process as it has been a struggle to get what they need in a timely manner which directly affects their ability to perform their day-to-day activities.

Functional Overview

The proposed Loaner Vehicle Request and Inventory Management Project aims to solution current issues of maintaining a catalog of all vehicles that are available, inventory tracking, and will also introduce a process that incorporates approval and delivery tasks into one flow.

Technical and Process Overview

Phase 1: Application Foundation - Field/Form Behavior - Request Process

The request process is set off by users (contractors) requesting for a vehicle of their choice. An intake form that has all the necessary fields for the request will be available on the Service Portal. The intake form will be asking for the following information.

1. Vehicle Selection from a list of available vehicle records stored on the system.
2. The date they would need to receive the vehicle.
3. The date they expect to return the vehicle.
4. Office Location.
5. Delivery information.
6. Additional comments.

Once the request is submitted, an automated flow will trigger an approval to an approval group. Upon approval, the state field of the selected vehicle record will be set to unavailable and a new entry on the Vehicle Tracker table will be created. The Vehicle Tracker entry will be populated with the following information: vehicle borrowed, the person who made the request, location, start and end date and other important information. A task to deliver the vehicle to the contractor will be created. Once the delivery task is closed the request ticket is closed.

Things to be accomplished in sprint 1

- Application scope
- Update set
- Table creation and relationships
- Import set
- Application Menu and modules
- Related list
- UI policy
- UI action
- Catalog item

Phase 2: Return Process - Process Automation - Data Security

Once the vehicle is returned, the warehouse team is responsible for assessing the vehicle and filling in a section on the Vehicle Tracker record that mostly asks information on the condition of the vehicle.

If the vehicle is in good condition, the warehouse team will need to click the **Return to Warehouse** button which will set the Vehicle record to Available. If the vehicle needs to be serviced, then they would need to click the **Send to Repair** button which will set the Vehicle record to Maintenance and will kick off the Maintenance process.

Things to be accomplished in sprint 2

- Process automation (flow designer)
- Client script
- Script include
- Access Control Rules (ACL)
- Email notification

Phase 3: Maintenance process - Database Automation - User Interface

The maintenance process triggers a Vehicle Servicing record that will serve as an official document to work on the vehicle. The maintenance task will require the team to document what the issue is on the vehicle and what they did to resolve it. Once they close the task, they determine if the vehicle can be placed back to the warehouse or if it will need to be decommissioned.

Things to be accomplished in sprint 3

- Business rules
- Service portal