

Equipment Focus

Training Guide

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Technical Support

AssetWorks provides several ways to connect with the Customer Support team. Be prepared to provide detailed information to the representative. If you are reporting an issue by email, include screen shots of your problem. This will provide the Customer Support representative with the information needed to respond quickly and effectively.

Customer Support is available Monday through Friday, 7:00 a.m. to 7:00 p.m., Eastern Time.

Telephone: 1-610-225-8300

Email: <u>M5Support@AssetWorks.com</u>

Website: Community.AssetWorks.com

The support website can be used to open issues, subscribe to user groups and download documentation, as well as to access the latest AssetWorks news. For secure access to the website, contact Customer Support by calling the number above.

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Contents

Technical Support	
Overview	3
Configuration	4
Unit Asset Types	4
Equipment Conditions	5
Equipment Return Reasons	6
Equipment Types/SKU	7
Unit Main	8
Process	<i>9</i>
Equipment Request	
Equipment Check Out Notifications	
Equipment Check In	12
Equipment Check Query	13
Standard Job MCC	14
Work Order for Equipment	15
System Flags	
Bin Logic – System Flag 5137	16
Reports	16
Updates	17

Overview

The Equipment Focus module offers clients the ability to maintain and track equipment within the M5 application. In summary, the functionality allows equipment to be ordered, received, issued (check-out) and returned (check-in), and transferred to another location within the Equipment Focus module. It includes the ability to:

- Associate equipment to a work order to use for specific work performed.
- Open a work order on the equipment itself.

Charging back the use of the equipment (equipment associated to work orders) involves the M5 billing module to accommodate this requirement. Initially, this development initiative was centered just on tools. In order to expand this functionality, M5 now uses a broader term, Equipment so as not to limit its usefulness specifically to tools. A tool will now be a type of equipment.

Equipment tracking exhibits many of the same characteristics as serialized parts or an individual unit, the main difference being the ability to give or loan a piece of equipment to a person. Equipment is not Charged Out like a part is. There are other qualities about equipment that differ from parts, such as the ability to track it by a SKU number whereas the actual equipment itself will have different manufacturers and ID's. An employee can own a piece of equipment (Tech's that own their own tool box and tools) and use them to perform work on a work order.

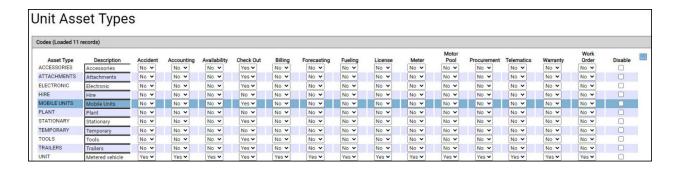
Equipment has the option to store and track a serial number. It is important to be able to group a single piece of equipment to others by SKU number for reporting and querying on availability and whereabouts of a specific kind of equipment. Users may also assign equipment to a work order for the purpose of specific job tasks.

When a piece of equipment needs maintenance, users can open a work order on that equipment just like they can open a work order for a unit that needs maintenance. The ability to charge a rental rate for the use of an equipment is included in this module.

Configuration

Unit Asset Types

Clients licensed for the Equipment Focus module will see this frame in M5. In M5 Equipment is considered a Type of unit or Asset. These asset types are predefined by AssetWorks and hard coded. The description can be modified by the client. Clients can set the capabilities which control functionality for each asset type.



These are set by changing the flag to **Yes** or **No**. This determines if this Asset Type will have that specific functionality (for example, if the Work Order is set to **Yes** then that Asset Type can have a work order created to record repairs). The following are functions that users can turn on or off for a specific asset type:

- Accident
- Accounting
- Availability
- Check Out
- Billing
- Forecasting
- Fueling
- License
- Meter
- Motor Pool
- Procurement
- Telematics
- Warranty
- Work Order

Equipment Conditions

The Equipment Condition codes frame allows you to create a valid list of condition codes such as new, good, fair, poor, scrap, missing, or stolen. This allows for the effective management of the equipment throughout their life cycle and ensures they are kept in a safe, usable condition.

Commonly used codes are **New**, **Good**, **Fair**, and **Poor**. Clients can add as many conditions as needed to meet their requirements. There is an option, in the form of a flag checkbox, to **Disallow Check Out** for a particular condition code to signify the equipment is in bad condition and needs repair. This ensures the equipment is not checked out when it is in a substandard condition and not suitable for safe use.

Equipment (Conditions (Loaded 8 records)						
Code	Description	Disallow Check Out	Job Code	Job Reason	Job Priority	Disabled	
BAD	bad						
DBL	Disabled						
DIS	disallow check out						
GOOD	good						
TEST01	test 000000000000001						
TEST03	test						
TEST04	test 04						
TEST05	test 05		01-00-001	3	1	V	
		_					

To create a new Equipment Conditions Code, select the blank **Code** field and type in a new code. This field has a limit of six characters (alphanumeric). Then, enter a **Description** for the new code. This field has a limit of 20 characters (alphanumeric), (for example, POOR – Poor Condition or GOOD – Good Condition).

If the **Disallow Check Out** checkbox is selected and a job code and reason are entered, when that condition is selected on equipment check in, a work request will be created so the equipment can be inspected or repaired. Select **SAVE** to complete.

To modify an existing Equipment Conditions Code, enter a new **Description** or change the **Disallow Check Out** checkbox. You can also edit the job information. After all changes are made, select **SAVE** to update the record.

You may also disable a **Code** by selecting the Disabled checkbox in the row of the code you want to disable. After selecting the checkbox, select **SAVE** at the top of the frame to disable the condition code.

You can delete a condition **Code** provided it is not in use on any other tables in the system. If the code is in use, you will not be able to delete it from the list.

Equipment Return Reasons

The Equipment Return Reasons frame allows you to create and maintain codes that indicate why a piece of equipment was returned (for example, Broken. Identified as unusable after being checked out). These codes are user-defined but can be used to flag a piece equipment for removal from your inventory to prevent damage or injury.

quipment Return Reasons						
Equipment F	Return Reasons (Loaded 6 record	ds)				
Code	Description	Default	Disabled			
211	Reg 21.1.0 Eq Return					
DIS	Disabled					
DTYFC2	Updated Description		~			
RET	Return	V				
RKGAZ1	Updated Description	_	V			
TEST 1	ci x a lcf85f1c 6g2					

To create a new Equipment Return Reason, select the blank **Code** field and enter a new code. This field has a limit of six characters (alphanumeric). Then, enter a **Description** for the new code. This field has a limit of 20 characters (alphanumeric). For example, BROKE – Broken will not work or WT – Wrong Tool.

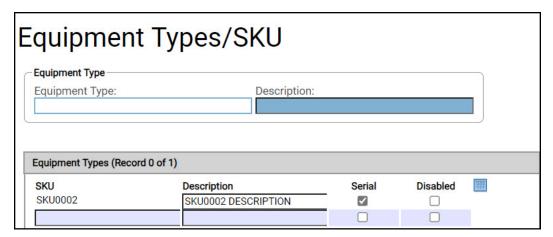
You can modify the description of existing return reasons. To modify a description, select the **Description** field and type a new description over the existing one. You can also select or clear the Default checkbox. **Note:** Only one Default flag can be set. Select **SAVE** to update the record.

To disable an Equipment Return Reason, select the **Disabled** checkbox in the row of the code you want to disable. Select **SAVE** to disable the code.

You can delete a code provided it is not in use on any other tables in the system. If the code is in use, you will not be able to delete it from the list. To delete a return reason that is not in use, select the row to make it active. Select **DELETE**, the selected row highlights red. Select **SAVE** to delete the record.

Equipment Types/SKU

The Equipment Types/SKU frame allows you to create codes that group equipment together by functionality and identify each equipment with an asset number and description. These codes extend the system's ability to manage the equipment for fleet usage.



To create a new Equipment Type/SKU (stock keeping unit) enter the new **Equipment Type**, up to 30 characters, alphanumeric. Press **Tab** or **Enter**. You will be asked to confirm the new code. Enter a new **Description**. Enter a new **SKU** for the type, up to 30 characters alphanumeric, and a Description, also 30 characters, alphanumeric. The Equipment Types/SKU frame allows a SKU to have the **Serial** checkbox selected. This requires the serial number on unit main when System Flag 1055 is set to **N**. Select **SAVE** when complete.

To view or modify an existing type and its SKUs, enter or select the **Equipment Type** from the List of Values (LOV). The **Description** and **SKU** assignments display. You can modify the description of the type or its SKUs, you may also disable a SKU.

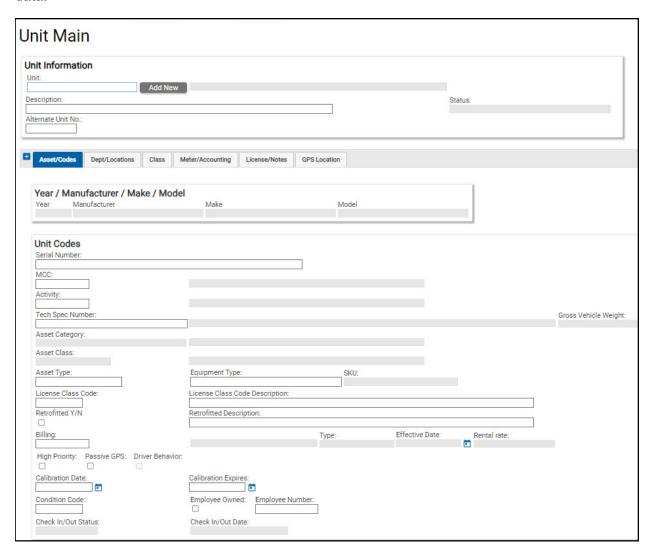
To delete a SKU select its row and select **DELETE**. The row highlights red. Select **SAVE** to remove the record. To delete the type, select the **Equipment Type** field and select **DELETE**. The row highlights red. Select **SAVE** to remove the record. You are unable to delete the code if it is in use on another table in the system.

Unit Main

The following tracking equipment fields on Unit Main within the Unit Codes section are:

- Equipment Type
- SKU
- Condition Code
- Check In / Out Status
- Employee Owned flag
- Employee Number
- Calibration Date
- Calibration Expires

Using screen designer on a Unit Main frame can be customized to only have Equipment related data.



Process

Equipment Request

The Equipment Request frame allows you to create a request in the system to use a piece of equipment. A number is assigned to each request in order to manage the pickup and return of the equipment. More than one SKU can be included on a request. Notes can be entered for each request. The notes are viewable from the Equipment Check Out frame.

To create a new Equipment Request, select the **New Equipment Request** button. Enter the **Request Employee No**, this is the employee making the request. **From Location** is a valid location the request is requesting from. In the **To** field select from dropdown what the request is for: Department, Employee, Location, Unit, Work Order, or Direct Account. Enter the number that relates to the item selected in the **To** field (for example, if employee is selected a valid employee ID is required) or select from the List of Values (LoV) for your selection.

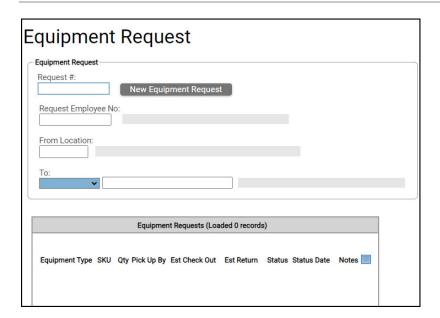
In the **Equipment Request** i-frame, enter the **Equipment Type**, **SKU** (if not populated), **Qty**, and the **Pick Up By** employee. Enter the **Est Check Out**, **Est Return** date and times. The **Status** defaults to Open, and the Status Date is the current date. Select **SAVE** to create the request.

To view or modify an existing request enter or select the Request #. You can modify the SKU requests based on the status. If the SKU has not been checked out yet, you can modify the details and change the status. You can also delete it. Select DELETE, the row highlights red. Select SAVE to remove the record.

To add an additional SKU to the request, within the i-frame go to the first blank row of the table and enter a new **Equipment Type** and **SKU**. Enter the quantity and the number of the employee who will be picking it up. The **Est. Check Out**, **Est Return**, and **Status** dates are the dates of the previous SKU requested. You can modify those if desired. The **Est. Check Out** date must be before the **Est Return** date. You can enter **Notes**, as applicable. Select **SAVE** to complete changes.

Notifications

The **EQUIPMENT REQUEST CREATED** notification is sent when a user creates a new Equipment Request. The notification can be configured on the Notification Manager frame or on Location Main (Notifications) when Location is set on the Notification Manager frame.



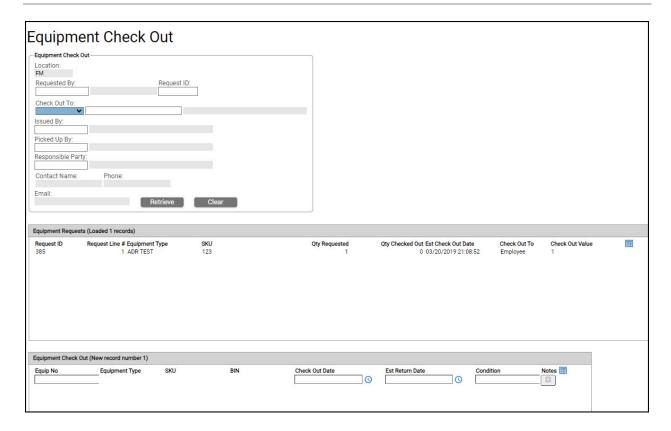
Equipment Check Out

The Equipment Check Out frame allows you to complete the issuing (check out) transaction of an equipment request. The **Location** defaults to your current location. Enter the **Requested By** employee number and the **Request ID**, and then select **Retrieve**. The details of the request display. Enter the **Issued By**, **Picked Up By**, and **Responsible Party** employee numbers. You can enter additional **Contact Name**, **Phone**, and **Email** address information, as applicable.

Complete the Equipment Check Out section with the **Equip No**, **Equipment Type**, **SKU**, **Check Out Date** and **Est Return Date**. You can update the **Condition** field and **Notes**. Select **SAVE** when you are done. This frame can be used to check out equipment without an Equipment Request. Equipment can be checked out without a request by entering the required fields on the Equipment Check out section.

Notifications

The **EQUIPMENT CHECKED OUT** notification is sent when a user checks out equipment. The notification can be configured on the Notification Manager frame or on Location Main (Notifications) when Location is set on the Notification Manager frame.

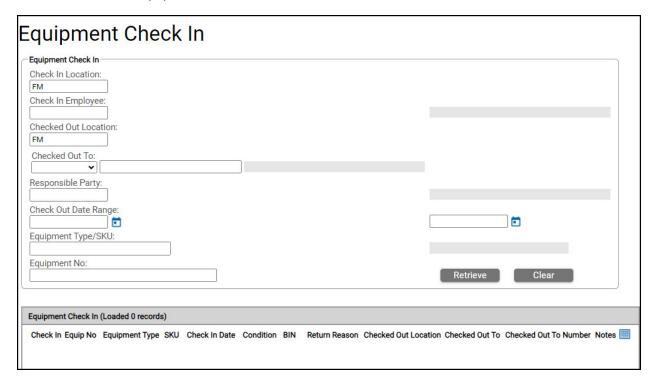


Equipment Check In

The Equipment Check In frame allows you to complete the return transaction of an equipment request. The **Checked Out Location** displays from the issue transaction.

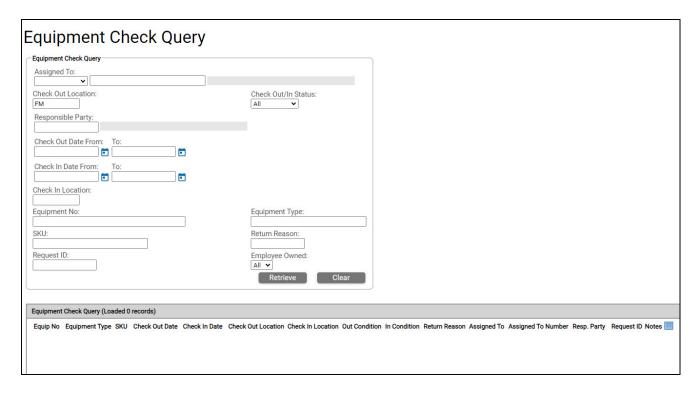
The Check In Location is your current location. Enter the Check In Employee, Checked Out To, and a Check Out Date Range. Select Retrieve.

The list of checked out equipment display within the **Equipment Check In** i-frame. Locate the equipment being returned and select the **Check In** checkbox. Enter **Condition**, **BIN**, and **Return Reason**. To transfer the part you can choose a different **Check In Location**. Select **SAVE** to check in equipment.



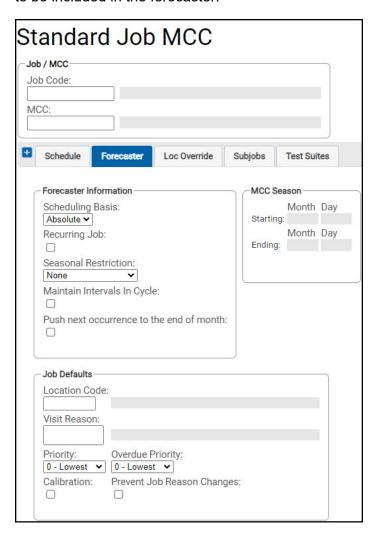
Equipment Check Query

The Equipment Check Query frame displays a list of the equipment that is currently checked out or equipment that was checked out and then returned. Enter filters for your query (for example, **Assigned To**, **Responsible Party**). Select **Retrieve**. The details of the check out and in transactions display as view only within the **Equipment Check Query** i-frame.



Standard Job MCC

The Standard Job MCC can be created to forecast calibration of equipment. Select the **Calibration** checkbox within **Job Defaults** on the **Forecaster** tab. If selected and the job is added to an equipment work order, the unit's calibration date is updated when the job is marked as DON on the work order. Standard jobs can be forecasted if the Unit Asset Type is identified to be included in the forecaster.

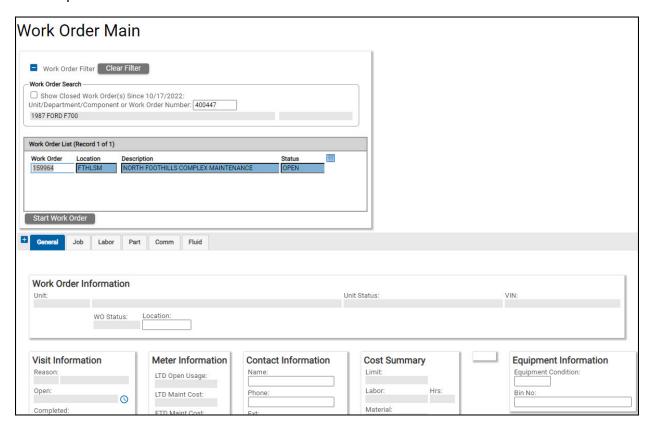


M5 can restrict system and assembly codes from being entered or selected throughout M5 by MCC, asset type and category codes. Job restriction is not required but helps to define system and assembly codes to perform jobs that make sense for the equipment. On the System Code frame select the **Restrictions** link on each system Code and set restricted by MCC's Codes, Asset Types, Category Codes, Tech Spec Codes, Department Groups, or Location Groups, as applicable. When there are restrictions on a system code it highlights in red.

Work Order for Equipment

Work requests and work orders can be created on equipment to make repairs or inspections to ensure the equipment is in good working order. As equipment is just a type of asset, they have full work order functions if the Unit Asset Type is configured to allow.

Work Requests can be automatically created during the check-in process if the condition selected has **Disallow** check out and a job code and job reason identified on the Equipment Condition frame. When a work order is created on an Equipment Asset an Equipment Condition field displays. This field is updatable and validated. The **BIN No** location, if identified, displays and is updateable.



System Flags

Bin Logic - System Flag 5137

Bin number logic for equipment is controlled by System Flag 5137. The system clears the bin code from the equipment record when it is checked out. This field is enterable and is valid only if the System Flag 5137, Require/Validate Bin Number on Unit Main? is set to **Y** or **N**. If System flag 5137 is set to R or V, then the bin will not be removed during check out but would still be updated during check out and on the Unit Main Equipment record.

- **N** Bin Number is not required/validated; will allow the Bin Number to be free form up to 30 characters.
- Y Bin Number is not required but will be validated against a part bin and is limited to 6 characters if entered.
- R Bin Number is required but will not be validated.
- **V** Bin Number is required/validated.

Reports

All M5 standard Unit Reports have been modified with filters for Equipment. The filters are Asset Type, Equipment Type, and SKU.

Updates

Release	Section	Description
23.2	Overview	On page 1 removed the reference to a special billing item. The existing M5 billing process has been modified to include a new billing item for equipment charges.
24.3	Equipment Request – Notifications section	Added new EQUIPMENT REQUEST CREATED notification.
24.3	Equipment Check Out – Notifications section	Added new EQUIPMENT CHECKED OUT notification.