AssetWORKS

Role Privileges

Table

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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: M5Support@AssetWorks.com

Website: https://community.assetworks.com/hc/en-us

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.

Role Privileges

Privilege	Description
ACCIDENT-DELETE	Allows a user to delete an accident on the Accident Entry frame. The accident can only be deleted if it is not associated with a work order.
ADD DRIVER/VEHICLE	Allows a user to add a new driver to TripCard on Card Maintenance>Driver tab. Add Driver button is disabled if user does not have this privilege (for TripCard only).
ADD JOB TO COMPL WO	Allows a user to add jobs to work orders in completed status.
ADJ CLOSED WO - COMM	If the user only has the Adjust Closed WO minus this new privilege, then the commercial charge tab is read only. If the user has both privileges, then the user can adjust all charges on the closed work order.
ADJ CLS JOB RSN	If the user has this privilege along with the ADJUST CLOSED WO privilege, they can adjust the job reason on a closed work order.
ADJ COMM FUEL	Allows a user to adjust commercial fuel charges.
ADJUST CLOSED WO	Allows a user to adjust a closed work order.
ALLOW NAPA RETURN	Restricts user access on the Return checkbox feature within the Part Request Handling frame.
ALLOW NEG RECEIVE	Allows a user to allow negative receipts into inventory.
AMEND EXTRACTED PO	Allows a user to amend Part POs once they are extracted.
ANY-WO-LABOR-DATE	Allows a user to enter labor past the WO completed date or before the open date.
APP OWN PART REQUEST	Allows a user to approve their own part request.
APP OWN SVC REQUEST	Allows a user to approve their own service request.
APP/REJ REQ ON FLY	Allows a user to approve and reject a requisition directly on the Part Requisition Entry frame.
APPROVE PART REQUEST	Allows a user to select the Approve checkbox on the Part Request Handling frame and on the Work Order Main frame (only appears when System Flag 5424 = Y).

Privilege	Description
APPROVE SVC REQUESTS	Allows a user to approve Service Requests.
ASSOC TO NEW LOC	Allows a user to change the location of a component on the Location Component Association frame.
AUTO UPDATE LTD USE	Allows a user to update life-to-date usage when entering commute usage entries. This privilege automatically updates the LTD usage on Unit Use/Cost History without first prompting the user if they want to update the LTD usage by the same amount.
AUTOISS RSV STK PRTS	Allows a user to issue reserved stock parts on Part Receive.
AVAIL BOARD ADMIN	As a default, this privilege is not granted to users. Dispatchers or anyone having this privilege would be able to update anything on the availability board.
AVAIL BOARD LIMITED	As a default, this privilege is not granted to users. Foreman level, only allowed to check and uncheck spares and update parking location where applicable.
BACKDATE WO CLOSE DT	Allows a user to back date a work order when closing. When a user does not have the new privilege, they will see a CLOSE button in place of the date field on Work Order Main when trying to close a work order. This takes into consideration the setting of System Flag 2104.
BACKDATE-COMM-CHGS	Allows a user to backdate the invoice date on the Comm tab of the WO to be prior to WO Open Date.
BACKDATE-CONTRACTS	Allows the user to use a contract that is expired as long as it hasn't been closed.
CAN CLSE PO	Allows user to cancel or close a purchase order from the PO Detail frame.
CE MAIL	Allows Crystal Reports to be emailed to internal email addresses only.
CE MAIL EXTERNAL	Allows Crystal Reports to be emailed to internal and external domains.
CHANGE ITEM SLD UNIT	Privilege is related to the Unit/Component Record Purge batch process. Allows a user to change a Unit/Component Item (Exclude from Purge) to Y. This excludes a particular unit/component from the purge process.

Privilege	Description
CHANGE OWN NOTES	Allows a user to change own notes only and no others. This controls conversation notes on WO Main and Unit Disposal.
CHANGE PO EMAIL	Allows a user to manually override the destination email address at the time of printing for Purchase Orders and Service Orders.
CHANGE WO LOCATION	Allows a user to change the WO Location on work order.
CHAT	Allows a user to use M5 Chat functionality.
CHG ASSOC STATUS	Allows a user to manually reset the component status on Component Main.
CHG JOB VISIT REASON	Allows a user to change a job visit reason on an open work order.
CHG MASTER PART NO.	Allows a user to change the master part number when a part is being received on the Part Receive frame.
CHG PART NO- PART REC	Allows a user to perform a part number change when receiving parts on Part Receive.
CHG PART NO/QTY	Allows a user to change the part number when approving a part requisition on the Part Requisition Approval frame.
CHG SUPS PART	Allows a user to create superseded parts.
CHG SYMPTOM/SOURCE	Allows a user to change the symptom or source on Work Order Job Detail, Work Request Main, Work Request Query, and Work Order Query.
CHG WORK REQ STATUS	Allows user to change status of a work request.
CLOSE DIRECT INVOICE	Allows a user to close a direct invoice entry which will effectively close the work order for the unit.
COMM REC IND ACCT	Allows a user to receive commercial services for an indirect account.
COMM REC WORK ORDER	Allows a user to receive commercial services for a work order.
COMM VEND	If the user does not have the WO COMM privilege, they are not allowed to change any commercial charges on Work Order Main.
COMM WO VENDOR	Allows a user to add any vendor on the commercial work order. **Note:** If the vendor has an assigned location group and the user does not have this privilege, the user can only use vendors on Commercial Work Order Entry that are in the same authorized location groups.

Privilege	Description
CREATE 3RD PARTY CLM	Allows a user to create 3rd party claim on Warranty Claim Manager.
CREATE CORE CLAIM	Allows a user to create core claim on Warranty Claim Manager.
CREATE CORE TRACK	Allows a user to create a claim directly on the Core Tracking frame.
CREATE DEPT REQ	Allows a user to create a Department Requisition on the fly.
CREATE SUBRO CLAIM	Allows a user to create a subrogation claim on Warranty Claim Manager.
CREATE WARR CLAIM	Allows a user to create warranty claim on Warranty Claim Manager.
CREDIT WORK ORDER	Determines whether a user can use the credit work order option on the Part Return frame.
DASHBOARD ADMIN	Allows a user to access all users' dashboards in order to maintain them.
DELETE WORK REQUEST	Allows a user to delete a work request.
DISPOSE UNIT	Allows a user to flag a unit for disposal on Unit Disposal.
DISTRIBUTION CREDIT	Allows a user to apply a credit (negative) entry to be entered on the Supply Distribution frame.
DOC TYPES – MODIFY	Allows a user to modify a document (attachment) that has already been uploaded.
DOC TYPES - UPLOAD	Allows a user to upload a new document.
DRV BH – CATEGORY PM	Driver Behavior licensed module. Allows a user to override the global parameters at the category level by selecting the pencil icon next to the category.
DRV BH – GEO FC GRP	Driver Behavior licensed module. Allows a user to set up Geofence Groups and to edit existing Geofence groups using the pencil icon.
DRV BH – GLOBAL PM	Driver Behavior licensed module. Allows a user to set up globally defined parameters for recording violations (for example, Definition).
DRV BH – PARAMETERS	Driver Behavior licensed module. Allows a user to override the global parameters at the driver (if applicable) and vehicle level by selecting the pencil icon.
DRV BH - SETTINGS	Driver Behavior licensed module. Allows the user to select the settings gear icon on the top navigation bar.
EDIT CONTRACT ON PO	Allows a user to edit or update the contract number on a Purchase Order.
EDIT HOME PAGE	Allows a user to add frames, web pages, and links to their home page.

Privilege	Description
EDIT INV ATTACH	Allows a user to edit an attachment on an invoice.
EDIT INVOICE CLAIM	Allows a user to edit an invoiced warranty claim.
EDIT LICENSE ATTACH	Allows a user to add, edit, or delete attachments.
EDIT METER 1	Allows a user to update Meter 1.
EDIT METER 2	Allows a user to update Meter 2.
EDIT OPERATOR NUMBER	Allows a user to edit the operator number on the Employee Main frame.
EDIT SHIP TERMS	Allows a user to enter a validated value in the Ship Terms column on the Part Request Handling frame.
EXCEED BAL AMT CONT	Allows a user to exceed the contract balance amount when a line item is approved.
FINALIZE ACCIDENT	Allows a user to finalize an accident.
FINALIZE TESTSUITE	Complete Test Suite Results button is not enabled on Work Order Main if the user does not have this privilege. The system displays a message, "This function is not active at this time."
IMMEDIATE – REASSIGN	This is a customer specific privilege.
INCIDENT COORINATOR	Allows a user to turn an incident into a WR (thus allowing access to the create WR link). If not granted, the user is unable to see the link on Incident Main.
INCIDENT WO-OPEN	Allows a user to create a work order from an incident on the Incident frame using a link. If the role does not have this privilege, the link does not appear.
INSERT PART INVENTRY	Allows a user to add a part to their location on the Inventory Location Manager frame.
INV CYCLEDATE SPREAD	Allows a user to spread physical inventory cycle count dates.
INVOICE APPROVAL	Allows a user to approve an invoice on the Invoice Approval frame.
INVREC-ATTACH	Allows a user to create attachments on the Invoice Reconciliation frame.
JOB EXCEED WO LIMIT	Allows a user to override the work order cost limit.
LOCK NOTES	Allows a user to lock notes to prevent changes.
MOBILE – ADD JOB	Can the user add a job to a work order from a mobile device?
MOBILE – ASSET INVTRY	Allows a user to conduct an asset inventory on a mobile device.
MOBILE – CHG CONFIG	Allows a user to change configuration on a mobile device.

Privilege	Description
MOBILE – CREATE WO	Can the user create or open a work order from a mobile device?
MOBILE – DEL TRANS	Allow a user to delete transactions on a mobile device.
MOBILE – LABOR	Can the user add labor to a work order from a mobile device?
MOBILE – METER ENTRY	Can the user update meters on the work order from a mobile device?
MOBILE – PART ISSUE	Allows a user to issue parts from a mobile device.
MOBILE – PART RECEIVE	Allows a user to receive parts using Mobile Focus on a hand-held device.
MOBILE – PHYS INVTRY	Allows a user to conduct Physical Inventory activities with a mobile device or handheld.
MOBILE – SUPPLY	Allows a user to use the supply distribution logic added to Mobile Focus.
MOBILE – WORK ORDER	Can the user access the work order screen from a mobile device?
MOBILE – WO COMP	Can the user complete a work order using a mobile device?
MOD APPROVED LABOR	Allows a user to modify labor approved by the supervisor.
MORE THAN 1 OPEN WO	If set to N, there can only be one open work order per vehicle regardless of maintenance location.
MP-MANAGER	Allows a user to see all motor reservations that need to be approved.
MP-RESV-APPROVAL	Allows a user to approve those motor pool reservations for their subordinates.
MP-RESV-ENTRY	Allows a user to create motor pool reservations.
MP ADJUSTMENT	Allows a user to make changes to a completed motor pool ticket including charges.
MYVEH-SHOW ALL VEH	SmartApps only.
NATIONAL PARTS	Allows a user to add or update values in fields on Part Inventory Location Manager that are locked by the National Part flag on Part Main Catalog.

Privilege	Description
NEW NON STOCK PART	Allows a user to create new non stock parts on-the-fly from the Purchase Order frame and Part Receipt (manual receipt only), Purchasing Requisitions, Part Request and Request Handling, and Purchasing Contracts.
NEW NSTKPRT LOC	Allows all users by default to preserve existing functionality. Determines whether to display the pop-up, "part does not exist at receiving location, receive as stock part, receive as non-stock part". If the user has only this privilege they will only see "create as non-stock part."
NEW PART XREF	Allows a user to add new part cross references.
NEW STKPART LOC	Allows all users by default to preserve existing functionality. Determines whether to display the pop-up, "part does not exist at receiving location, receive as stock part, receive as non-stock part." If the user has only this privilege they will only see "create as stock part."
NEW STOCK PART	Allows a user to create new stock parts from the Purchase Order frame and Part Receipt (manual receipt only), Purchasing Requisitions, Part Request and Request Handling, and Purchasing Contracts.
NOTES ON CLS WO	Allows all users by default to preserve existing functionality. If a user does not have this privilege they cannot edit or add notes on a closed work order.
NOTE MANAGER	Allows a user to change any notes entered on Work Order Main and Unit Disposal, regardless of who locked it. This privilege overrides the CHANGE OWN NOTES privilege if the user has both.
NOT FORCE TRANSFERS	This privilege does not force a user to transfer parts requested by locations when receiving stock inventory on Part Receive.
OPEN PO UNAUTH LOC	Allows a user to create POs at locations for vendors that do not have the location as authorized. Users without the authorization can only create POs at locations on the vendor's authorized list.
OVERRIDE METER WARN	Allows a user to override a meter warning.
OVERRIDE PIN	Allows a user to log out an employee in Labor Wedge, if you are designated as a supervisor.
OVER_RIDE TRANS	Allows a user to perform a one-time override on a transaction that failed due to limit restrictions (TRIPCard Portal).
PARTISSUE-SUSPEND	This privilege prevents a user from adding part charges to work orders that are suspended.

Privilege	Description
PART HND REQ CANCEL	Allows all users to preserve existing functionality. Allows a user to handle delete REQUEST status on the Part Request Handling frame.
PART PICK UP	Allows a user to select the Picked-Up checkbox on the Part Request frame if the request is in READY or REQUEST status.
PART REC MANUAL PO?	Allows a user to receive parts on a manual PO.
PRINTER ADMIN	Allows a user to change only their printer assignments.
RCPT AT ZERO PRICE	Allows a user to receipt parts at zero price.
RECON ADJ USER	Allows a user to adjust an invoice reconciliation.
REQUEST CARD	Allows a user to request cards on Cards tab of Card Maintenance (TRIPCard Portal).
RPT LOG ADMIN-ALLUSR	Allows a user to view or edit reports other than their own.
RPT LOG ADMIN-EDIT	Allows a user to use edit feature on their own reports.
RUN IMMEDIATE	Allows a user to run immediate Crystal Reports.
SCHEDULE REPORT	Allows a user to schedule Crystal Reports.
SER PART AUTH	Controls the ability to mark a previously missing part to Active again and placed in the appropriate Inventory Location.
SOLD UNIT ARCHIVE	Allows a user to run the Unit Archiver batch process.
TERM ILR W/BAL	Allows a user to edit the terminate checkbox on the ILR Termination frame.
UNITAVAIL-BACKDATE	Allows a user to backdate the effective date on the Availability Unit Status frame.
UNITAVAIL-COMMENTS	Allows a user to enter comments on the Availability Unit Status frame.
UNITAVAIL-CONFIRMCT	Allows a user to confirm the count on Availability Confirmation Count frame.
UNITAVAIL-JUSTIFY	Allows a user to override the below requirements message. Must be set in relationship to System Flag 2038.
UNITAVAIL-OPERSTAT	Allows the user to change operational status, effective date, est. days, OOS and comments on the Availability Unit Status frame.

Privilege	Description
UNIT REQUEST ADJ	Allows a user to make changes to a unit request.
UNIT REQUEST TIER1	Allows a user to approve unit requests.
UNIT REQUEST TIER2	Allows a user to create unit purchase requisitions from approved unit requests.
UNLOCK CAMPAIGN	Allows a user to unlock a finalized campaign so the units in the campaign can be modified and re-finalized. Dates cannot be modified.
UPDATE CARD STATUS	Allows a user to update the card status for TripCard on Card Maintenance>Card tab. Update card next to card status is disabled without this privilege (TripCard only).
UPDATE FAILED TRANS	Allows a user to update failed transactions and save or resubmit them (TripCard only).
UPDATE PART INVENTRY	Allows a user to update part inventory.
UPD ACQ DATE	Allows a user to update the Acquisition Date and Meter values on the Unit Main Acquisition Meter Information control.
UPD ARRIVAL DATE	Allows a user to update the Arrival Date value on the Unit Main Acquisition Meter Information control. **Note**: Meter values cannot be updated unless users have the UPD ACQ DATE privilege.
UPD AUTH COMM AMT	Allows a user to enter and update the vendor commercial charge authorization amount on Work Order Main and Work Order Express.
UPD CMR PREFIX	Allows a user to override the User Value setting for System Flag 5010.
UPD EQUIP USAGE	Allows a user to edit an existing equipment timesheet record entered on the Equipment Timesheet frame.
UPD EST JOB COST	Allows a user to update estimated cost on work orders.
UPD FINAL ACCIDENT	Allows user to update a finalized accident.
UPD IN-SERV DATE	Allows a user to edit the in-service date on Unit Main.
UPD JOB QTY W/BOOK	Controls the ability to update the Job Quantity on Work Order Main if the job is from Booking, which is only created or used if the customer has the External Customer licensing (EXCUST).
UPD PAY TIME LW	Allows a user to update time in Labor Wedge.

Privilege	Description
UPD RESV UNIT STATUS	This privilege allows a user to update the label and description of the six unit status codes located on the Unit Status Codes frame. The status codes B, O, I, A, D, S have imbedded application logic within M5.
UPD SAFETY DATA	Allows a user to update the Defect No, Defect Date, and Cannot be Driven checkbox for the existing data on WR Main and WO Main. Users without this privilege can only enter the new data but cannot update once data is saved.
UPD SOLD UNIT DISP	Allows a user to update the replacement unit and several sales and financial fields to be changed on the Unit Disposal frame after a unit has already been sold or disposed of.
UPD TIME LABORWEDGE	Allows an employee to update time when scanning time on the Labor Wedge frame.
UPD UNIT HIST	Allows a user to update unit history from the Unit Use/Cost History frame.
UPD UNIT ON CATEGORY	Allows a user to push changes made to the category code down to units and components by making the new tab called Units/Comps on Category Main editable.
UPD WARR TECH SPEC	Allows a user to modify any tech spec warranty terms that has the Template flag selected.
UPD WO CORE COST	Allows a user to update the core cost on Work Order Main if the part is a core part. For a closed work order, if the user has this privilege and ADJUST CLOSED WO privilege, they can update the core cost.
UPD WO PARTS	Allows a user to update work order parts information.
UPD WO PLAN DATE	Allows a user to update the Planning Date field on Work Order Job detail.
UPDATE WO ZERO EST HRS	Allows a user to update the four time-related value fields on a work order (Labor/ Shop/ Contingency/ Book and Est. Hrs. on the Job Line, accessed underneath the pencil icon in Work Order Main/Estimates tab) when the current value is not zero.
VEH SAFE TO DRIVE	Allows a user to select the Safe to Drive checkbox on the Vehicle Safety Query frame for any failed test suite regardless of the status of defect jobs.
VENDOR MERGE	Allows a user to use the Vendor Merge functionality to merge vendor records.
VG VIEW ALL LOCS	Controls whether a role can view Vendor Gateway tickets for location groups other than its own.

Privilege	Description
VIEW_ALL_ACCIDENTS	If the user does not have this privilege, they can only view the accidents they created.
WARR CANCELLATION	Allows a user to cancel a warranty.
WO-COMP-CLO ESTIMATE	Allows a user to edit the estimated hours on WO main if the WO is completed or closed.
WO-OPEN ESTIMATES	Allows a user to edit the estimated labor hours column on WO Main.
WOUNITALL – CANCEL	Allows a user to cancel a work order from Work Order Main.
WOUNITALL - CLOSE	Allows a user to close a work order from Work Order Main.
WOUNITALL – COMMERCIAL	Allows a user to add commercial charges in Work Order Main.
WOUNITALL – COMPLETE	Allows a user to complete a work order from Work Order Main.
WOUNITALL – DOWNTIME	Allows a user to suspend or unsuspend downtime.
WOUNITALL – FLUID	Allows a user to issue fluids on Work Order Main.
WOUNITALL – HISTORY	Obsolete
WOUNITALL – JOBS	Allows a user to add jobs to Work Order Main.
WOUNITALL – LABOR	Allows a user to add labor charges to a work order from Work Order Main.
WOUNITALL – OPEN DATE	Allows a user to change the open date in Work Order Main.
WOUNITALL – PARTS	Allows a user to charge parts from Work Order Main.
WO W/ DIFF MAINT LOC	Allows a user to open up a work order on a unit from a different maintenance location other than the unit's maintenance location.
WRITE TO NEW FILE	Obsolete
WR MASS DELETE	Allows a user to mass delete work requests on the Work Request Query frame.

Updates

Release	Section	Description
23.2	Role Privilege Table	Added new role privilege: 226 - UPD CMR PREFIX.
24.0	Role Privilege Table	Removed Role No. column.
24.2	Role Privilege Table	Added new role privilege – SER PART AUTH.
24.4	Role Privilege Table	Updated spelling of Authorized Privilege from CAN CLOSE PO to CAN CLSE PO.