



# Work Request Campaign

## Quick Guide

Version 24.x  
Last Modified 24.0 | March 2024

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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](mailto:M5Support@AssetWorks.com)

Website: [Community.AssetWorks.com](http://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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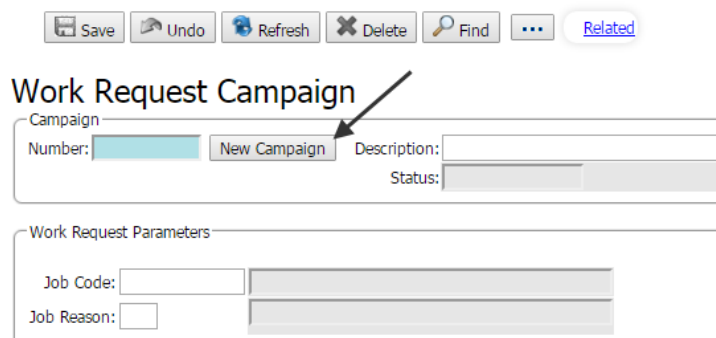
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## Work Request Campaign

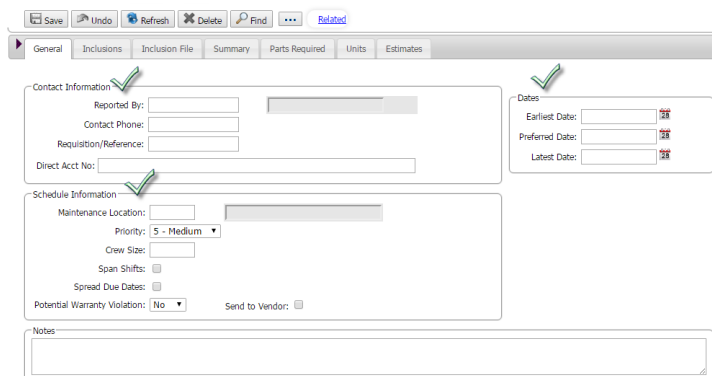
A Work Request Campaign is used to create identical work requests for a group of units and track them as a single entity through completion of the work requests process. These Work Request Campaigns are typically used for manufacturer mandated tasks like recalls or a fleet required activity such as changing emblems and decals. They are designed to efficiently handle a large number of identical requests without the cumbersome task of creating individual work requests.

To Create a Campaign open the Work Request Campaign frame and select on the New Campaign button. Enter a Description for the new campaign. Enter the Work Request Parameters Job Code and Visit Reason.



The screenshot shows the top toolbar with buttons for Save, Undo, Refresh, Delete, Find, and a menu icon. Below the toolbar is the 'Work Request Campaign' form. The 'Campaign' section includes a 'Number' field, a 'New Campaign' button (indicated by an arrow), a 'Description' field, and a 'Status' field. Below this is the 'Work Request Parameters' section with 'Job Code' and 'Job Reason' fields.

On the General tab enter the Contact Information: Reported by, Contact Phone and Requisition/Reference Direct Acct No.



The screenshot shows the 'General' tab of the Work Request Campaign form. It includes several sections: 'Contact Information' with fields for Reported By, Contact Phone, Requisition/Reference, and Direct Acct No.; 'Dates' with fields for Earliest Date, Preferred Date, and Latest Date; 'Schedule Information' with fields for Maintenance Location, Priority (set to S - Medium), Crew Size, Span Shifts, Spread Due Dates, Potential Warranty Violation (set to No), and Send to Vendor; and a 'Notes' section at the bottom.

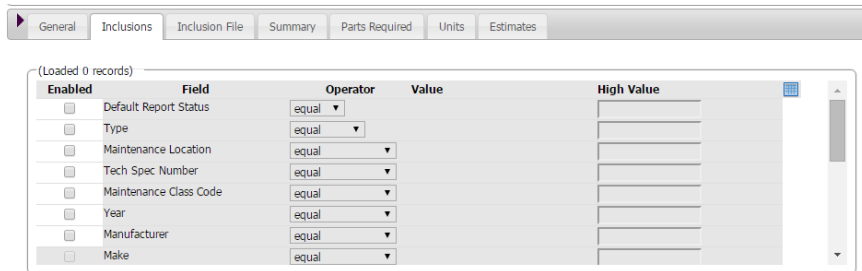
Next enter the Dates:

- Earliest Date - The job can be completed.
- Preferred Date - The due date of when the campaign should be performed.
- Latest Date - The latest date the campaign should be performed. Jobs will become overdue if not done by this date.

Next enter the Schedule Information:

- Maintenance Location - This location will be on all unit work requests.
- Priority - This is used for scheduling.
- Crew Size - The number of people needed to perform the work.
- Span Shifts - Can the job start at one location shift and to go another?

The Inclusions tab - In this area, you may use the filters to identify units to include on your unit lists. You may use as many filters as necessary to create your list.



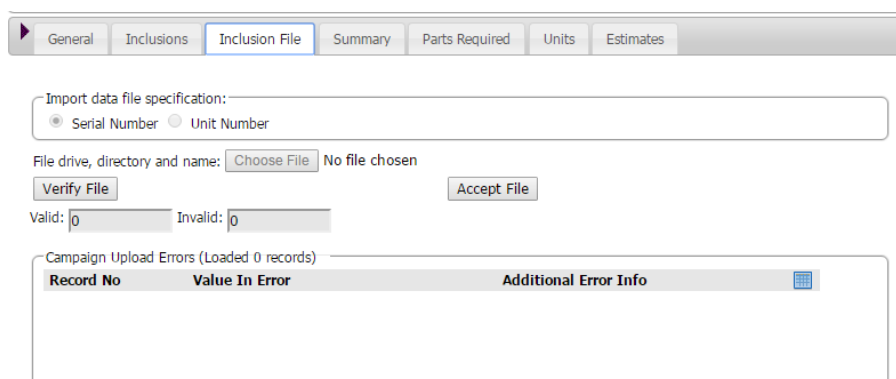
These filters include: Default Report Status, Type, Maintenance Location, Tech Spec Number, Maintenance Class Code, Year, Manufacturer, Make, Model, Unit Number, Serial Number, Category, Classes 1-5, Attachment Serial Number, and Attachment Tech Spec.

For an example, to choose all Class 1 = 1009, select the checkbox next to Class 1. Choose the operator Equal and enter the value 1009. This will select all units that have class 1 equal to 1009.

You may also create a range of values by using the operator Between and entering a value and a high value.

## The Inclusion File tab

You can create a simple text (.txt) file to import a list of unit numbers or serial(VIN) numbers. This is helpful for those recall bulletins or notices that specify a list of units or serial numbers included in the recall. You may be dealing with a large number of units. It would be a simple task to create an Inclusion File from the manufacturer's list. This saves you from having to spend time filtering and searching through your database for the matching units and hoping you find them all. Using a simple text editor like Notepad create the file putting one unit number or serial number on each line. Save the file and note its location.

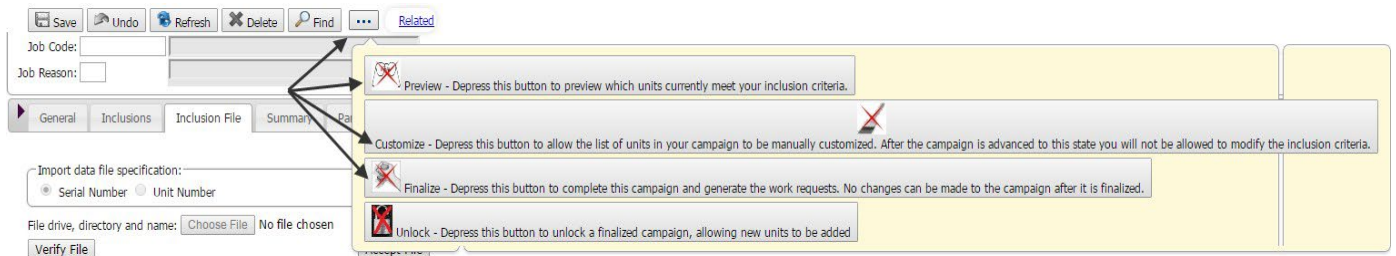


The screenshot shows a software interface with a tabbed menu at the top. The 'Inclusion File' tab is selected. Below the menu, there is a section for 'Import data file specification:' with two radio buttons: 'Serial Number' (selected) and 'Unit Number'. Below this is a text field for 'File drive, directory and name:' with a 'Choose File' button and the text 'No file chosen'. There are 'Verify File' and 'Accept File' buttons. Below these are two input fields: 'Valid: 0' and 'Invalid: 0'. At the bottom, there is a table titled 'Campaign Upload Errors (Loaded 0 records)'. The table has three columns: 'Record No', 'Value In Error', and 'Additional Error Info'. The table is currently empty.

After the text file is ready, go to the Inclusion File tab and set up the import step. Start by indicating which field you used in the file, unit or serial number. Select Choose File and indicate the location of your Inclusion File. After the file is found, select Verify and the data in the file will be checked against the data in the system. Valid and Invalid records are shown. Error messages include: Duplicate – if the same number is found more than once, Unit Does Not Allow Work Orders and such.

Make corrections and verify again. When the file is good select Accept File. The data from the file will be imported and any Upload errors will be shown on the table below. The Record Number will be the line number in the Inclusion File. Locate the line and correct the number. Repeat the import process until all your data is in the M5 System. With all the unit or serial numbers loaded the next step is to Preview the units found in the M5 System.

To Preview your list select the ... button next to Find and choose Preview Your List, with the eyeglasses icon. After that has been executed the units tab will be populated with the units that match your text file list or filters.

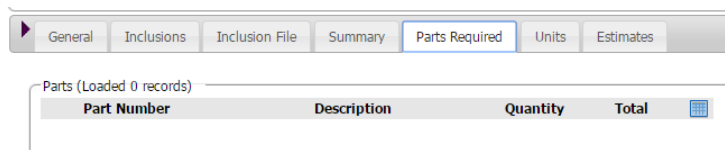


## To Customize Your List

After reviewing your unit list, you are able to customize your list. Select the paint brush icon from the ... button to manually customize your unit list. After the campaign has advance to this state, you will not be able to modify the inclusion criteria.

## The Parts Required tab

This section will allow you enter in the parts need to perform this job. The Part number and quantity. This will follow through to the work request.



## Finalize Your Campaign

After reviewing and modifying your unit list, you are ready to finalize the campaign and create work requests. From the ... button select the hand stamper. This will create work request for all the units on the list and finalize the campaign.

## The Summary tab

The Summary tab will show the number of work request that were created. It will also display the number of open jobs and completed jobs. This section will show the actual time and cost summary for these jobs.

The screenshot shows the 'Summary' tab selected in a software interface. The interface has a top navigation bar with tabs: General, Inclusions, Inclusion File, Summary (selected), Parts Required, Units, and Estimates. Below the navigation bar, there are two main sections:

- Job Summary:** Contains four input fields: Number of Work Requests, Number of Open Jobs, Number of Completed Jobs, and Total Jobs.
- Actual Time & Cost Summary:** A table with two columns: 'Per Job' and 'All Jobs'. The rows include: Labor Hours, Labor Cost, Part Cost, Commercial Cost, Parts, Labor and Comm, and Expected Cost.

## The Estimates tab

The Estimates tab shows various parameters that you may configure according to your needs as they relate to the actual work requests.

The screenshot shows the 'Estimates' tab selected in a software interface. The interface has a top navigation bar with tabs: General, Inclusions, Inclusion File, Summary, Parts Required, Units, and Estimates (selected). Below the navigation bar, there are three main sections:

- Setting:** Contains five checkboxes: Labor hours are entered, costs calculated; Part costs based on entered list; Estimate costs are entered, details are ignored (checked); Allow changes on Work Request and job?; and Fixed Price.
- Hours/Costs:** Contains input fields for Job Quantity, Labor Time, Shop Time, Contingency Time, and Book Time, each followed by 'Hour(s)'. To the right are input fields for Labor Cost, Part Cost, Commercial Cost, and Estimated Cost.
- Resource (Loaded 0 records):** A table with columns: Resource, Description, Quantity, and Primary. The table is currently empty.



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## Setting

- Labor estimates are always entered as hours
- The part cost always comes from the sum of the parts on the list
- Estimates are always entered.
- Allow changes on Work Request and job?
- Fixed Price
- Hours/Cost
- Job Quantity
- Labor Time
- Shop Time (The time the job usually takes the shop's resources)
- Contingency Time
- Book Time (flat rate time)
- Commercial Time
- Resource
- Enter resource type

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## Updates

<b>Release</b>	<b>Section</b>	<b>Description</b>
23.2	All sections	Applied miscellaneous writing style updates throughout the document.