



## Workflow

# Application Training – User Guide

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# WorkflowGuide

Version 24.x

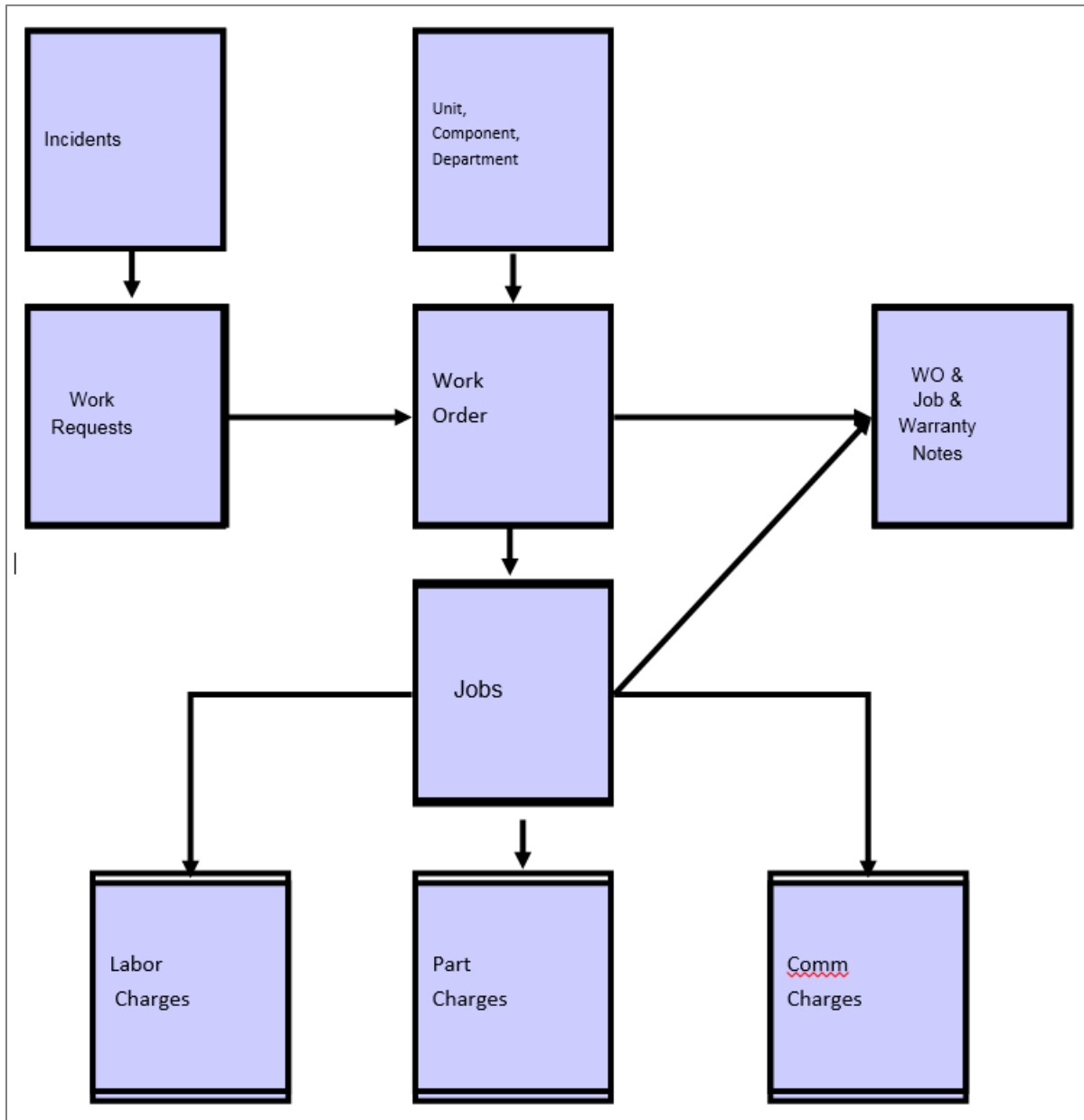
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## Contents

<b>1. Workflow Diagram.....</b>	<b>1</b>
<b>2. Basic Workflow Processing.....</b>	<b>2</b>
Work Requests .....	2
Work Orders .....	2
<b>3. Work Request Processing.....</b>	<b>4</b>
Work Request Incident .....	4
Incident .....	5
Unit.....	6
Contact.....	6
Additional Information .....	7
Miscellaneous .....	7
Work Requests .....	9
Work Request Main .....	10
Work Request Resources.....	21
Work Request Campaign Management .....	22
Work Request Campaign Frame .....	23
Campaign Resources .....	33
Work Request Query .....	36
Forecaster.....	40
<b>4. Work Order Processing.....</b>	<b>43</b>
Work Order Life Cycle .....	43
Work Order Main .....	44
Work Order Main – Basic Navigation.....	44
Commercial Work Orders .....	65
Work Order Summary.....	71
Work Order Express .....	72
Work Order Close.....	73
Work Order Vendor Repairs .....	74
Tracking Information .....	74
Status and Dates .....	75
Vendor .....	75

Contract Information .....	76
Job Tracking .....	76
<b>5. Test Suites .....</b>	<b>78</b>
Test Suite Maintenance .....	79
Send Fail Notification .....	80
In Range Only .....	80
Test Suite and Test Suite Failure Notes .....	81
Subsections tab .....	81
Categories tab .....	82
Work Order Test Suite Entry .....	82
Direct Test Suite Result Entry .....	84
Test Suite History Query .....	86
Selection Criteria .....	86
Completed Tests .....	86
<b>6. Accident Module .....</b>	<b>87</b>
Unit Information .....	88
Accident Detail .....	89
Unit Damage tab .....	90
Vendor Estimate tab .....	91
Work Requests tab .....	91
Insurance Claims tab .....	91
Payments tab .....	91
<b>7. Warranty Functionality .....</b>	<b>92</b>
Definitions .....	92
<b>8. Shop Planning .....</b>	<b>94</b>
<b>9. Booking Appointments .....</b>	<b>96</b>
<b>10. Queries .....</b>	<b>97</b>
<b>11. System Flags .....</b>	<b>98</b>
<b>12. Updates .....</b>	<b>99</b>

# 1. Workflow Diagram



## 2. Basic Workflow Processing

M5 allows for the full tracking of jobs scheduled, outstanding, or completed for units, departments, or components within the fleet organization.

### Work Requests

Jobs that need to be completed in the future are stored in the system as Work Requests. These requests must be added to work orders before they can be marked as “done”.

Work Requests are created by using a variety of ways within M5:

- Work Request Incidents
- Work Request frame
- Deferred Jobs from Work Orders
- Campaign and Recall Management
- Multiple Work Requests
- Forecaster and Standard Jobs
- Test Suites

### Work Orders

Work Orders are used to record pertinent information about equipment maintenance (for example, units, components, and departments). Captured information includes:

- Jobs Performed
- Labor Charges
- Part Charges
- Product Charges
- Commercial Charges
- Notes and Warranty Information

The workflow process in M5 is job centric, meaning a job must be added to a work order before any labor, part, or commercial charges can be made.

The basic steps to create a work order are:

- Enter the Unit/Department/Component or Work Order number to be worked on.
- Enter a reason why a work order is being opened – Work order visit reason for units or components or a department requisition for department work orders.
- Enter the date/time the work order is being created Create a job – This will describe what work is to be done:
  - Work Accomplished Code
  - System/Assembly Code
- Enter the location where the work will be performed.
- Enter an initial job status.
- Add charges to the work order:
  - Labor Charges
    - Enter the job code.
    - Enter the employee performing the work.
    - Enter the time spent.
  - Part charges
    - Enter the job code.
    - Enter the employee issuing the parts.
    - Enter the part number being issued and quantity.
    - Enter the part failure code.
  - Fluid Charges
    - Enter the job code.
    - Enter issue date Enter hose.
    - Enter quantity.
    - Enter the employee.
  - Commercial Charges
    - Enter the job code.
    - Enter the vendor code.
    - Enter the invoice amounts.

### 3. Work Request Processing

#### Work Request Incident

The Work Request Incident is considered the highest level of reporting a problem with a unit, department or component.

The Incident itself is simply a note which describes the symptoms of the problems, associated with the unit number along with other fields of information.

The source of an incident is typically the operator or driver of the unit.

There are other fields of information on the Incident frame that are optional for the user to enter such as status, meter information, parking location and reported by.

There are three fields on this frame that are currently displayed only when System Flag 5008 is set to **Y**. These are free form, optional fields. After the incident is created in M5, it can lead to the creation of a work request (pending job).

If the incident is made into a work request then the notes on the incident now become a work request note. After the work request is added to a work order the work request note is added to the work order as a job note.



## Incident

Field	Description	Notes
Unit/Department/ Component	You can choose the entity from the dropdown and then enter or select the appropriate number from the LoV.	Will depend on selection made in the filter section.
Incident Number	You can enter or select an incident number using the LoV or you can use the New Incident button to create a new incident.	System Flag 1059 determines a system wide or location range numbering system for work orders. Work order numbers can also be entered manually.
Status	This is a free form field.	
Incident Status	The incident status can be selected from this dropdown.	<p>Pending – Default status when incident is first created.</p> <p>WO Open – Incident made into a work order.</p> <p>Finished – Work order is complete.</p> <p>Closed – Work order is closed.</p> <p>Rejected – No problem found and this status is only controlled if a user selects it.</p> <p>WR Created – Work request created for incident.</p>
Open Date/Time	The date and time the incident was opened.	Will automatically display with the current date and time when you select the New Incident button.
Last Status Change	The date and time the incident's status last changed.	Will automatically display with the current date and time when you select the New Incident button. It will then update accordingly with status changes.
Last Incident Status Date	The last incident status date.	This does not include time, just the date.

## Unit

Field	Description	Notes
Serial Number	The unit's serial number from unit main.	Will automatically display if one exists.
Date In Service	The unit's in-service date from unit main.	This field will automatically display.
Parking Location	The unit's parking location from unit main.	This field will automatically display but can be changed if necessary. If System Flag 5211 is set to Y, this is a required field.
Maintenance Location	The unit's maintenance location from unit main.	This field will automatically display but can be changed if necessary.
Asset Class	The unit's asset class from unit main.	This field will automatically display.
Meter 1	Meter 1 can be updated here.	Meter types are determined by the unit's MCC.
Meter 2	Meter 2 can be updated here.	Meter types are determined by the unit's MCC.

## Contact

Field	Description	Notes
Reported By	Enter the person or entity who reported the problem here.	<p>If System Flag 2010 is set to Y, then a valid employee (operator) must be entered.</p> <p>If System Flag 5211 is set to Y, then this is a required field of entry.</p> <p>If System Flag 2010 is N and System Flag 5211 is set to Y, then the field is required, but not validated.</p>
Name	Enter the person or entity's name here. Depending on flag settings, the name may populate automatically.	Enter the person's name only if System Flag 2010 is set to N and System Flag 5211 is set to N. If System Flag 2010 is set to Y, then the name will default from EMPLOYEE MAIN.
Phone	Enter a contact phone number.	

## Additional Information

Field	Description	Notes
		<p>If System Flag is 5217 - "Control symptom code entry on Incident Main using both asset class and source?" If Y, then both the asset class and the source will control what symptom codes can be entered or seen using the LoV on the Incident screen.</p> <p>If System Flag 5008 is set to Y, then fields Symptom, Run and Block will also be available.</p>
Source	Enter a valid source code or select from the LoV.	
Symptom	Enter a valid symptom code or select from the LoV.	
Priority	Enter a job priority code if applicable.	
Zone	Free form field.	
Component	Free form field	
Condition	Enter a value for the unit condition if applicable.	
Run	Free form field.	Visible with System Flag 5008 set to Y.
Block	Free form field.	Visible with System Flag 5008 set to Y.

## Miscellaneous

Field	Description	Notes
Triage Comment	Select the + icon to view any triage comments for the Symptom or Asset Class.	
Make This Incident Into a Work Request	Select this link to launch a pop-up to create a work request.	Enter the necessary information and select save. You will then see a hyperlink that says, "This Incident is Associate to Work Request..." The WR Number will be a hyperlink to Work Request Main where you can further edit the work request.

Field	Description	Notes
This Unit Has an Open Work Order	If the unit has an open work order this hyperlink will display.	N/A
Create a Work Order for this Incident		If System Flag 5341 is set to Y, then the hyperlink will launch the Commercial Work Order frame instead of Work Order Main.

## Work Requests


Work Requests can be created with or without incidents. A work request is simply a job to be performed sometime in the future. Work Requests can be created manually, as a result of a deferred job from a work order, incident, or system generated by using the campaign/recall or Forecaster functionality.

Work Requests can flag potential warranty violations. System Flags 5234 and 5235 determine whether or not Warranty Notes are required (3 C's).

When System Flag 5520 is **Y**, the **Shop Time** field populates on the **Estimates** tab with data based on logged labor for the job/unit/tech spec combinations being the median labor time for the job over the previous 12 months when the job was performed greater than or equal to two times.

On *Work Request Main*, after the job code and job reason are entered, the user can receive a whole-unit or system/assembly warranty violation based on the current date and time (not the estimated due date) and current unit life-to-date usage.

As the part numbers are entered, the user can receive part warranty violations. If a work request is manually changed such that it was not a warranty violation before but is a violation now, it will be flagged when the work request is saved again.

 Work requests that are generated by Forecaster will not qualify for generating warranty violations. As a matter of practice, such jobs are expected recurring PMs and inspections and would not be the subject of a warranty.

The campaign process will generate warranty violations if the unit qualifies as having whole unit or system/assembly warranty or part warranty that has not expired and if the **Potential Warranty Violation** field is set to *Yes* on the *Campaign Manager* frame.



For more information regarding warranty functionality, please see the *Warranty Management User Guide*.

The work requests will be displayed when opening a work order to notify the user that there is additional work to be done.

## Work Request Main

SAVE
UNDO
REFRESH
DELETE
FIND
ATTACH
MORE ▾
RELATED ▾

### Work Request Main

**Work Request**

Unit:	2780	2015 E-350 11 PASS VAN	Max WO:	0	
Serial#/Vin:	2780 GRHND TESTER				
Number:	7509155	Occurrence:	1	Create Date:	10/12/2016
Job Code:	02-03-002	INSPECT SPEEDOMETER		Campaign No:	
Job Reason:	PREVENTIVE MAINT - S				
Schedule Shift:	1	DAY SHIFT		Work Order:	

+
General
Summary
Parts
Incidents
Estimates

**Contact and Reference Information**

Reported By: 00001

Phone: ( ) 555-1212

Maintenance Location: **FRED**

WR Source: Manual

Incident:

Accident No:

Send to Vendor: No

Preserve estimates?: No

Direct Acct No: 1/11/111/1

Close-Out:

**Dates**

Earliest: 10/13/2016

Due: 10/13/2016

Latest: 10/13/2016

**Notification**

Date:

**Additional Information**

Source: DISPATCH

Symptom:

## Work Request Information

Field	Description	Notes
Unit/Component/Department	Select the type of work request and then enter a valid unit, component, or department.	N/A
Serial/Vin	Identifying information for the selected type of work request displays.	N/A
Number	If this is an existing work request, enter the number or use the LOV (FIND button) to find the correct work request.	N/A

Field	Description	Notes
Occurrence	The number of times this job has already been performed this fiscal year.	For example, if this is the 2nd time an oil change has been forecasted, then a 2 will display here.
New Ticket	If this is a new work request select the New Ticket button.	N/A
Job Code	One job code is assigned per work request. The job code is a combination of the work accomplished code, system code and component code. It defines what type of work will be done to the unit.	N/A
Job Reason	The visit reason explains the job needs to be performed to the unit or the cause.	For example, P – Preventative
Schedule Shift	The shift or window of time the unit will be worked on in the shop. Used in shop planning.	N/A
Max WO	This value is the WO. Cost Limit set on the unit accounting frame.	N/A
Create Date	The date the work request was created.	N/A
Campaign No.	If this was generated from a campaign, the campaign number displays.	See the Work Request Campaign section.
Work Order	If the work request is on a work order, the work order number displays here.	N/A

**General Tab**

Field	Description	Notes
Reported By	This field is used to collect contact information.	If System Flag 2010 is set to Y, the person must be a valid employee.
Phone	Phone number for the contact person.	N/A
Requisition/Reference	Free form field for additional information.	N/A

Field	Description	Notes
Maintenance Location	The maintenance location will default from the unit's maintenance location located on unit main.	This location is used for reporting only and does not prevent the work request from showing due at other locations or preventing those locations from adding it to a work order.
WR Source	The work request sources are; forecaster, campaign and manual (which includes incidents).	N/A
Employee/Group	The employee or a group of employees assigned to the work request.	N/A
Incident	If this was created from an incident, the incident number will display.	N/A
Alternate Unit No.	If the unit has an alternate unit number on unit main it will display.	N/A
Accident No.	If the WR Source is Accident, then an accident number can be entered here.	If System Flag 5194 is set to Y, the accident number has to be a valid accident number.
Quote No.	Value populated if using the Quote functionality.	N/A



Field	Description	Notes
Send to Vendor?	Yes/No drop down.	<p>If the Standard Job Tech Spec for the Job Code is configured for using a Vendor, this field will be set to Y by default. If a Vendor No. is entered, it will be automatically set to Y. If the Vendor No. is later removed the flag will remain set to Y.</p> <p>The work request can have the Vendor flag set to Y with no Vendor No. entered as an indicator to the Shop Planning module. The Shop Planning processes will not reserve the labor hours on the work request from the location's resources and will not count the work request's resources against the location's limits. But the shop time will be used to determine when the next job in the appointment will be planned.</p>
Vendor No.	Enter a valid vendor from vendor main.	N/A
Preserve Estimates?	Automatically set to No. If any changes are made to the WR, other than the Due Date, then this flag changes to Yes.	N/A
Status	Can be set to Unlock, Lock or Firm.	<p>Locked - A locked work request will not be automatically changed by the system in any way.</p> <p>Unlocked - An unlocked work request can be rescheduled by the planner.</p> <p>Firm - Same as locked but has a custom function for a specific customer.</p>
Direct Account No.	Enter a direct account number for billing purposes if applicable.	N/A
Close-Out	Customer-specific functionality.	N/A

**Additional Information**

Field	Description	Notes
Source	The source is who reported the incident that led to the Work Request.	For example a dispatcher or an operator.
Symptom	The symptom is a valid code that describes what is occurring when a unit has a mechanical failure.	N/A

**Dates**

Field	Description	Notes
Earliest Date	The earliest date the work request can be performed. If this was a forecasted job, this would be the earliest date based on the earliest deviation set in STANDARD JOB MCC.	N/A
Due Date	The due date of the work request. If this was a forecasted job, this would be the actual date the job is due based on the STANDARD JOB MCC intervals.	N/A
Latest Date	The latest date the work request should be performed. If this was a forecasted job, this is the latest date the job is due based on the latest deviation set in STANDARD JOB MCC.	N/A

**Notes**

Field	Description	Notes
Notes	Notes for the work request. The notes will be moved to the job notes after the work request is added to the work order.	N/A
Warranty Complaint Note	Only displays if System Flag 5234 is set to Y. Enter the complaint.	N/A
Warranty Cause Note	Only displays if System Flag 5235 is set to Y. Enter the cause of the job.	N/A

Field	Description	Notes
Warranty Correction Note	Used when completing or cancelling Warranty jobs.	See System Flags 2067 and 5067.

## Summary tab

SAVE UNDO REFRESH DELETE FIND ATTACH MORE ▾ RELATED ▾

### Work Request Main

**Work Request**

Unit:	2780	2015 E-350 11 PASS VAN	Max WO:	0	
Serial#/Vin: 2780 GRHND TESTER					
Number:	7509155	Occurrence:	1	Create Date:	10/12/2016
<span>New Ticket</span>					
Job Code:	02-03-002 INSPECT SPEEDOMETER				
Job Reason:	P PREVENTIVE MAINT - S				
Schedule Shift:	1 DAY SHIFT				
Work Order:					

+ General Summary Parts Incidents Estimates

**Actual Time & Cost Summary**

Per Job	Job/Quantity
Labor Hours:	0
Labor Cost:	0
Part Cost:	0
Commercial Cost:	0
Parts, Labor and Comm:	0
	Expected Cost:
	0

The **Summary** tab provides the actual time and cost summary **Per Job** and **Job/Quantity**. These fields are read-only.

Parts tab

SAVE
UNDO
REFRESH
DELETE
FIND
ATTACH
MORE ▾
RELATED ▾

### Work Request Main

**Work Request**

Unit: ▾ 2780 2015 E-350 11 PASS VAN

Serial#/VIN: 2780 GRHND TESTER

Number: 7509155 Occurrence: 1 New Ticket

Job Code: 02-03-002 INSPECT SPEEDOMETER

Job Reason: P PREVENTIVE MAINT - S

Schedule Shift: 1 DAY SHIFT

Max WO: 0

Create Date: 10/12/2016

Campaign No:

Work Order:

+
General
Summary
Parts
Incidents
Estimates

Parts (Loaded 1 records)

Part Number	Description	Quantity	Unit Inventory	Unit Price	Total Qty	Total Cost

Field	Description	Notes
Parts	A valid list of parts needed to perform the work.	
Part Number	Enter the part number.	
Description	The part description will automatically display.	
Quantity	Enter the number of parts required.	
Unit Inventory	Unit of inventory.	For example, EACH or BOX.
Unit Price	Price of the Unit Inventory.	Will automatically populate.
Total Qty	Total quantity.	
Total Cost	Total cost of the parts.	

## Incidents tab

SAVE UNDO REFRESH DELETE FIND ATTACH MORE ▾ RELATED ▾

### Work Request Main

**Work Request**

Unit: ▾	2780	2015 E-350 11 PASS VAN	Max WO:
			0
Serial#/Vin: 2780 GRHND TESTER			
Number: 7509155	Occurrence: 1	<span>New Ticket</span>	Create Date: 10/12/2016
Job Code: 02-03-002	INSPECT SPEEDOMETER		Campaign No: 
Job Reason: P	PREVENTIVE MAINT - S		
Schedule Shift: 1	DAY SHIFT		Work Order: 

+GeneralSummaryPartsIncidentsEstimates

Incidents (Loaded 0 records)

Incident No	Status	Description	Component	Condition	📄

The **Incidents** tab will display any incidents associated with the work request along with their status and data from Incident Main.

## Estimates tab

SAVE
UNDO
REFRESH
DELETE
FIND
ATTACH
MORE ▾
RELATED ▾

### Work Request Main

**Work Request**

Unit:  2015 E-350 11 PASS VAN Max WO:

Serial#/Vin:

Number:  Occurrence:  Create Date:

Job Code:  INSPECT SPEEDOMETER Campaign No:

Job Reason:  PREVENTIVE MAINT - S

Schedule Shift:  DAY SHIFT Work Order:

+
General
Summary
Parts
Incidents
Estimates

**Settings**

Labor Cost Entered; Hours Ignored

Part Cost entered; List Ignored

Estimated Cost Entered; Details Ignored

Allow changes on job?:

Fixed Price:

Span Shifts:

**Hours/Cost**

Job Quantity:  Priority:

Labor Time:  Hour(s) Crew Size:

Shop Time:  Hour(s) Labor Cost:

Contingency Time:  Hour(s) Part Cost:

Book Time:  Hour(s) Commercial Cost:

Industry Standard Time:  Hour(s) Estimated Cost/Job:

**Work Request Resources (Loaded 0 records)**

Resource	Description	Quantity	Primary
<input type="text"/>		<input type="text"/>	<input type="checkbox"/>

Field	Description	Notes
Settings	<p>Dependent on System Flag 5230 as to whether it is an editable flag:</p> <ol style="list-style-type: none"> <li>1: Labor estimates are always entered as hours.</li> <li>2: Labor estimates are hours as default, but costs may be entered.</li> <li>3: Labor estimates are entered as costs, but hours may be entered.</li> <li>4: Labor estimates are always entered as costs.</li> </ol>	N/A

Field	Description	Notes
Labor estimates are always entered as hours	Dependent on System Flag 5231 as to whether it is an editable flag: 1: Part cost always comes from the sum of the parts on the list. 2: Part cost comes from the parts on the list by default. 3: Part cost comes from an entered value by default. 4: Part cost always comes from an entered value.	N/A
Part cost comes from the parts on the list by default;	Dependent on System Flag 5232 as to whether it is an editable flag: 1: Details are always entered. 2: Details or total may be entered, default details. 3: Details or total may be entered, default total. 4: Total is always entered.	N/A
Details are always entered	Can the user make change the job code?	N/A
Allow changes on job?	Should this job be charged a fixed price or the estimated cost instead of the actual cost?	N/A
Fixed price	If the job can be done on any shift, select the checkbox. Useful for shop planning.	N/A
Span Shifts?	Can the job span shifts?	N/A

**Hours/Cost**

Field	Description	Notes
Job Quantity	The number of jobs to be performed on the work request.	This will default to 1 and can be changed.
Labor Time	The estimated hours to do the job.	N/A
Shop time	Amount of time the job usually takes of the shop's resources, such as cleaning up, running for parts and tools.	See System Flag 5520.



Field	Description	Notes
Contingency Time	Extra planned time in case more is needed.	N/A
Book Time	Number of hours to be billed if billing estimates.	N/A
Industry Standard Time	Time to do the job based on Mitchell's or Alldata.	N/A
Priority	Based on job priority codes.	N/A
Crew Size	The number of people needed to perform the work.	N/A
Labor Cost	Only enterable if Labor hours are entered, costs calculated flag is selected. See System Flag 5230.	N/A
Part Cost	Only enterable if the Part cost based on entered list flag is selected. See System Flag 5231.	N/A
Commercial Cost	Enter the estimated cost for any vendor repairs.	N/A
Estimated Cost/Job	The total estimated cost for labor, parts and commercial charges to perform the job.	N/A

## Work Request Resources

This section lists the resources needed for the work requests. Used with the Shop Planning module.

## Work Request Campaign Management

The Recall and Campaign functionality automatically creates work request jobs and alerts technicians about the pending recalls and campaigns when the unit work order is opened. Jobs created under the Recall and Campaign Management module can be defined by many different criteria.

The system tracks the job history as well as the time and costs associated with the recall and campaign.

Recalls and campaigns can be created and deleted. To view the work requests generated by recall and campaign functionality, use the *Work Request Query* frame.

## Work Request Campaign Frame

SAVE
UNDO
REFRESH
DELETE
FIND
ATTACH
MORE ▾
RELATED ▾

### Work Request Campaign

**Campaign**

Number:  Description:  Status:

**Work Request Parameters**

Job Code:

Job Reason:

+
General
Inclusions
Inclusion File
Summary
Parts Required
Units
Estimates

**Contact Information**

Reported By:

Contact Phone:

Requisition/Reference:

Direct Acct No:

**Dates**

Earliest Date:

Preferred Date:

Latest Date:

**Schedule Information**

Maintenance Location:

Priority:  Crew Size:

Span Shifts:  Spread Due Dates:

Potential Warranty Violation:  Send to Vendor:

### Campaign section

The top header section is where you can enter or select an existing campaign number or select the **New Campaign** button to create a new campaign. The **Status** defaults to *Build* when first creating the campaign.

### Work Request Parameters section

The job code and job reasons are required fields and must be entered when creating a new campaign. You can enter the codes or select them from the list of values.

### General Tab

Field	Description	Notes
Reported By	Reported By is required. Enter a valid employee id. Use the list of values button to select a valid options.	N/A
Contact Phone	Contact Phone is optional. Enter a contact phone number.	N/A

<b>Field</b>	<b>Description</b>	<b>Notes</b>
Requisition/Reference	Requisition/Reference is optional. Enter a requisition or reference number.	N/A
<b>Dates Section</b>		
Earliest Date	Earliest Date is required. Enter the date.	N/A
Preferred Date	Preferred Date is Required. Enter the date.	N/A
Latest Date	Latest Date is required. Enter the date.	N/A
<b>Schedule Information Section</b>		
Maintenance Location	Maintenance Location is optional. Enter the maintenance location where job will be performed.	N/A
Priority	Priority is required. Enter a valid job priority code.	N/A
Crew Size	Crew Size is optional. Enter the number of people required to do this job.	N/A
Span Shifts	Span Shifts is optional. Select if the work can be done over shifts.	N/A
Spread Due Dates	Select the checkbox if you want to have the system spread out the due dates among all of the campaign units from the earliest through the preferred date.	N/A
Potential Warranty Violation?	If this could be a potential warranty job, set to Yes.	N/A

Field	Description	Notes
Send to Vendor	Yes/No dropdown.	<p>If the Standard Job Tech Spec for the Job Code is configured for using a Vendor, this field will be set to Y by default. If a Vendor No. is entered, it will be automatically set to Y. If the Vendor No. is later removed the flag will remain set to Y.</p> <p>The work request may have the Vendor flag set to Y with no Vendor No. entered as an indicator to the Shop Planning module. The Shop Planning processes will not reserve the labor hours on the work request from the location's resources and will not count the work request's resources against the location's limits. But the shop time will be used to determine when the next job in the appointment will be planned.</p>
<b>Notes Section</b>		
Notes	Key in any notes that would be helpful to the technician.	N/A
Warranty Complaint Note	Will only be available if the Potential Warranty Violation flag is set to Yes.	N/A
Warranty Correction Note	Used when completing or cancelling Warranty jobs.	See System Flags 2067 and 5067.

### Inclusions tab

SAVE
UNDO
REFRESH
DELETE
FIND
ATTACH
MORE ▾
RELATED ▾

## Work Request Campaign

**Campaign**

Number:  Description:  Status:

New Campaign

**Work Request Parameters**

Job Code:

Job Reason:

+
General
Inclusions
Inclusion File
Summary
Parts Required
Units
Estimates

(Loaded 0 records)

Enabled	Field	Operator	Value	High Value
<input type="checkbox"/>	Default Report Status	equal ▾		
<input type="checkbox"/>	Type	equal ▾		
<input checked="" type="checkbox"/>	Maintenance Location	equal ▾	<input type="text" value="CNLOC1"/>	
<input type="checkbox"/>	Tech Spec Number	equal ▾		
<input type="checkbox"/>	Maintenance Class Code	equal ▾		
<input checked="" type="checkbox"/>	Year	equal ▾	<input type="text" value="2001"/>	
<input checked="" type="checkbox"/>	Manufacturer	equal ▾	<input type="text" value="FORD"/>	
<input type="checkbox"/>	Make	equal ▾		
<input type="checkbox"/>	Model	equal ▾		

The inclusions tab can be used to filter select units to be recalled based on a single piece of criteria or a set of criteria.

Field	Description	Notes
Field	In order to select a field for an inclusion, select the checkbox under the Enable column.	N/A
Operator	The Operator field is where the conditions are set for this report. The Operator field is defaulted to equal. Use the dropdown menu to see all the operators available.	N/A
Value	In the Value column, enter the specific value to be selected. Use the list of values button to see valid selections if necessary.	N/A

## Inclusion File tab

SAVE UNDO REFRESH DELETE FIND ATTACH MORE ▾ RELATED ▾

### Work Request Campaign

Campaign  
Number: 288  Description: This is a test campaign Status: Saved

Work Request Parameters  
Job Code: 03-32-001 REMOVE/REPLC BATTERY & CABLES  
Job Reason: 3 RECALL

General Inclusions **Inclusion File** Summary Parts Required Units Estimates

Import data file specification:  
 Serial Number  Unit Number

File drive, directory and name:  
 No file chosen

Valid: 0 Invalid: 0

Campaign Upload Errors (Loaded 0 records)

Record No	Value In Error	Additional Error Info
-----------	----------------	-----------------------

This tab allows the user to import a file with a list of unit numbers or serial numbers of units that will be included in the campaign. This needs to be a simple text file.

## Summary tab

SAVEUNDOREFRESHDELETEFINDATTACHMORE ▾RELATED ▾

### Work Request Campaign

**Campaign**

Number:  Description:  Status:

**Work Request Parameters**

Job Code:

Job Reason:

+ General Inclusions Inclusion File Summary Parts Required Units Estimates

**Job Summary**

Number of Work Requests:

Number of Open Jobs:

Number of Completed Jobs:

Total Jobs:

**Actual Time & Cost Summary**

Per Job	All Jobs
Labor Hours: <input type="text" value="0.00"/>	<input type="text" value="0"/>
Labor Cost: <input type="text" value="0.00"/>	<input type="text"/>
Part Cost: <input type="text" value="0.00"/>	<input type="text"/>
Commercial Cost: <input type="text" value="0.00"/>	<input type="text"/>
Parts, Labor and Comm: <input type="text" value="0.00"/>	<input type="text" value="0.00"/>
	Expected Cost: <input type="text" value="0.00"/>

This tab is similar to the summary tab on *Work Request Main* and it provides the same information plus job summary information pertinent to the campaign such as the number of work requests, number of open jobs, number of completed jobs, and total jobs.



Parts tab

SAVE
UNDO
REFRESH
DELETE
FIND
ATTACH
MORE ▾
RELATED ▾

## Work Request Campaign

**Campaign**

Number:  Description:  Status:

**Work Request Parameters**

Job Code:

Job Reason:

+
General
Inclusions
Inclusion File
Summary
Parts Required
Units
Estimates

Campaign288 Parts (Loaded 0 records)

Part Number	Description	Quantity	Total
<input style="width: 100%; height: 100%;" type="text"/>		<input style="width: 100%; height: 100%;" type="text"/>	

Field	Description	Notes
Part Number	Enter a valid part number or use the list of values button to select a valid one.	N/A
Description	The system will fill in this field based on the part number selected.	N/A
Quantity	Enter the quantity of parts needed.	N/A
Total	The system will calculate the total.	N/A

## Units tab

SAVEUNDOREFRESHDELETEFINDATTACHMORE ▾RELATED ▾

### Work Request Campaign

**Campaign**

Number: 288	Description: This is a test campaign	Status: Saved
----------------	---	------------------

**Work Request Parameters**

Job Code: 03-32-001	REMOVE/REPLC BATTERY & CABLES
Job Reason: 3	RECALL

+GeneralInclusionsInclusion FileSummaryParts RequiredUnitsEstimates

Campaign288 Included Units (Loaded 0 records)

Unit No.	VIN	Year	Make	Model	Work Req. Number	Work Order	Job Status	

The **Units** tab will display the list of units included in the campaign and will have a work request created for them. This data will be available after you select the preview action button.

## Estimates tab

SAVE
UNDO
REFRESH
DELETE
FIND
ATTACH
MORE ▾
RELATED ▾

### Work Request Campaign

**Campaign**

Number:  Description:  Status:

**Work Request Parameters**

Job Code:

Job Reason:

+
General
Inclusions
Inclusion File
Summary
Parts Required
Units
Estimates

**Settings**

Labor Cost Entered; Hours Ignored

Part Cost entered;List Ignored

Estimated Cost Entered; Details Ignored

Allow changes on Work Request and job?:

Fixed Price:

**Hours/Costs**

Job Quantity:

Labor Time:  Hour(s) Labor Cost:

Shop Time:  Hour(s) Part Cost:

Contingency Time:  Hour(s) Commercial Cost:

Book Time:  Hour(s) Estimated Cost:

Campaign288 Resource (Loaded 0 records)

Resource	Description	Quantity	Primary	
<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="checkbox"/>	<input type="text"/>

The **Estimates** tab on *Work Request Campaign* functions in the same way as the **Estimates** tab on *Work Request Main*.

Field	Description	Notes
Settings	<p>Dependent on System Flag 5230 as to whether it is an editable flag.</p> <p>1: Labor estimates are always entered as hours.</p> <p>2: Labor estimates are hours as default, but costs may be entered.</p> <p>3: Labor estimates are entered as costs, but hours may be entered.</p> <p>4: Labor estimates are always entered as costs.</p>	N/A

Field	Description	Notes
Labor estimates are always entered as hours	<p>Dependent on System Flag 5231 as to whether it is an editable flag.</p> <p>1: Part cost always comes from the sum of the parts on the list.</p> <p>2: Part cost comes from the parts on the list by default.</p> <p>3: Part cost comes from an entered value by default.</p> <p>4: Part cost always comes from an entered value.</p>	N/A
Part cost comes from the parts on the list by default;	<p>Dependent on System Flag 5232 as to whether it is an editable flag.</p> <p>1: Details are always entered.</p> <p>2: Details or total may be entered, default details.</p> <p>3: Details or total may be entered, default total.</p> <p>4: Total is always entered.</p>	N/A
Details are always entered	Can the user make change the job code?	N/A
Allow changes on job?	Should this job be charged a fixed price or the estimated cost instead of the actual cost?	N/A
Fixed price	If the job can be done on any shift, select this box. Useful for shop planning.	N/A

**Hours/Cost**

Field	Description	Notes
Job Quantity	The number of jobs to be performed on the work request.	This will default to 1 and can be changed.
Labor Time	The estimated hours to do the job.	N/A
Shop time	Amount of time the job usually takes of the shop's resources, such as, cleaning up, running for parts and tools.	N/A

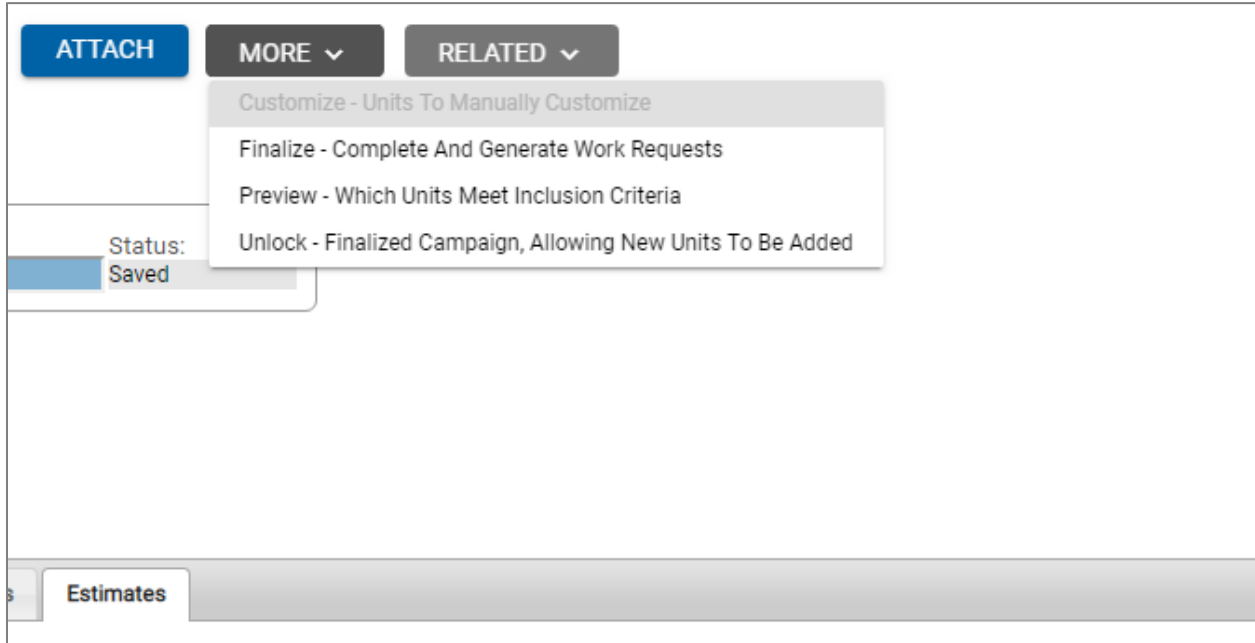
<b>Field</b>	<b>Description</b>	<b>Notes</b>
Contingency Time	Extra planned time in case more is needed.	N/A
Book Time	Number of hours to be billed if billing estimates.	N/A
Labor Cost	Only enterable if Labor hours are entered, costs calculated flag is selected. See System Flag 5230.	N/A
Part Cost	Only enterable if the Part cost based on entered list flag is selected. See System Flag 5231.	N/A
Commercial Cost	Enter the estimated cost for any vendor repairs.	N/A
Estimated Cost/Job	The total estimated cost for labor, parts and commercial charges to perform the job.	N/A

## Campaign Resources

This section lists the resources needed for the work request campaign. Used with the Shop Planning module.

## Action Buttons

By hovering over the **MORE** button at the top of the frame you can display the action buttons for the campaign.



## Generate Work Requests

The next step is to create or generate the work requests. The system will supply a campaign number automatically in the number field.

There can be up to three steps to be performed to generate the campaign work requests and a fourth if unlocking the campaign to add or remove units becomes necessary.

- **Preview** – Select the preview icon to review the units to be included in the campaign. Status changes to preview.
- **Customize** – Select the customized icon to manually change or add the units to be included in the campaign, if required. Status changes to customize.
- **Finalize** – Select the finalize icon to generate the work requests. Status changes to finalized.
- **Unlock** – Select the unlock icon to add or remove units from the list.

### Preview the Work Requests

Filtering information can be modified as many times as needed as long as the status remains preview. After the Customize icon has been selected, the Inclusions tab will be grayed out.

To preview the units that the campaign will include select the **MORE** button at the top of the frame. This button contains the options to preview, customize, finalize and unlock a finalized campaign.

1. Select the **Preview** option.
2. Select the **Units** tab to view the units that were included in the campaign based upon the filter criteria.

### Customizing the Campaign

Changes can be made to a campaign before the work requests are generated.

To complete the campaign select the **Customize** button by using the button at the top of the frame. Customize after verifying the included unit list is correct because once customized, the unit list cannot be changed.

### Finalize The Campaign

A campaign needs to be finalized after all changes are made in order for the work requests to be generated.

A finalized campaign can be reopened if the user has the proper privilege **UNLOCK CAMPAIGN** allowing more units to be included and then finalized again.

To finalize the campaign, select the **Finalize** button at the top of the frame.

The **Summary** tab will display the number of work requests generated and used to monitor the progress of the campaign.

### Delete a Campaign

A campaign can be deleted. After a campaign is deleted, all work requests created by campaign will be deleted. After the campaign is deleted, there is no history of that campaign ever being generated.

To delete a campaign, select to highlight the campaign number and then select the **DELETE** button at the top of the frame.

A confirmation window appears. If you want to delete the campaign, select Delete. This action cannot be undone.

All work requests created by campaign will be deleted. After the campaign is deleted, there is no history of that campaign ever being generated.

## Work Request Query

The screenshot displays the 'Work Request Query' interface. At the top, there are navigation buttons: SAVE, UNDO, REFRESH, DELETE, FIND, and MORE. Below these is the title 'Work Request Query'. The main area is divided into sections for selection criteria. The first section, 'Selection Criteria', includes fields for Location, Unit, Status, Ready for work, Work Req No., and Due Days Within. A 'More Selection Criteria' section is expanded, showing fields for Job Code, System Code, Job Reason, Priority, Work Plan ID, Campaign, Vendor No., Quote No., User Dept, Owner Dept, Tech Spec, MCC, Current Location, Accident No., Shift, Resource Type, and Source.

The *Work Request Query* frame allows you to search for and view data related to Work Request records in your M5 system. You can filter on a variety of selection criteria.

### Selection Criteria

Location/Location Group, Unit/Department/Component Number, Work Request Number, Status, Job Code/Partial Job Code, Job Reason, and Due Within. You can select the **More** dropdown to display additional criteria.

After you are finished entering your selection criteria, select the **Retrieve** button to run the query and display your results on the *Query Results* i-frame.

### Query Results

Each record that matches your selection criteria will display the Unit/Dept/Comp Number, Work Order Number (hyperlink to Work Order Main), Location, User Dept, Job Code, Reason, Unit Status, Hours, Work Plan Number, Priority, Campaign, Due Date, Work Plan Date, Shift, Assignment, Resource, Accident Number, Notify Date, Vendor Number, Locked?



## WR Mass Delete Functionality

The screenshot shows a software interface for querying work requests. At the top, there is a row of buttons: SAVE, UNDO, REFRESH, DELETE, FIND, and MORE. The MORE button is highlighted with a red box, and its dropdown menu is open, showing the option "Mass Delete of Work Requests based on the selection criteria." Below this is the "Work Request Query" section, which includes a "Selection Criteria" area. This area contains several input fields: "Location:" with a dropdown menu showing "FM", "Unit:" with a dropdown menu, "Status:" with a dropdown menu showing "Ready for work", "Show Only Next Occurrence:" with a checkbox, "FM Parking Location" (disabled), "Work Req No:" (text input), and "Due Days Within:" with a dropdown menu and a text input showing "300" followed by "Days".

If you have the required privilege (**WR MASS DELETE**) you can select the **MORE** button to execute a mass delete of work requests, depending on the value of System Flag 5167. Certain rules apply to this functionality and only work requests that meet certain criteria can be deleted using this functionality:

- Only those work requests not generated by the Campaign Manager can be deleted using the Mass Delete Function.
- If a work request has an occurrence number of 2 or higher, it cannot be deleted using this functionality. This indicates occurrence 1 appeared on a work order and therefore it cannot be deleted permanently using mass delete.
- Work requests that are in Locked status cannot be deleted using mass delete function.
- **WR MASS DELETE** privilege is needed to use this function on work request query screen.
- System Flag 5167 (# of Days Back For Mass Delete Work Requests) - When doing mass delete work requests, if Due Within or Due Between is defined, that will supersede this system flag. Otherwise, this flag will be used to specify the number of days old the work requests have to be deleted.

## Multiple Work Requests

SAVE
UNDO
REFRESH
DELETE
FIND

### Multiple Work Requests

Work Request

Unit:

Serial#/Vin:  Maintenance Location:

Work Requests (Loaded 0 records)											
Job	Job Reason	Maintenance Location	Earliest Date	Due Date	Latest Date	Est Cost/Job	Direct Charge Account	Ext Data	Notes	Complaint Note	Cause Note

The *Multiple Work Requests* frame provides quick entry to enter multiple work requests for the same unit. You can enter multiple rows as needed.

### Work Request information

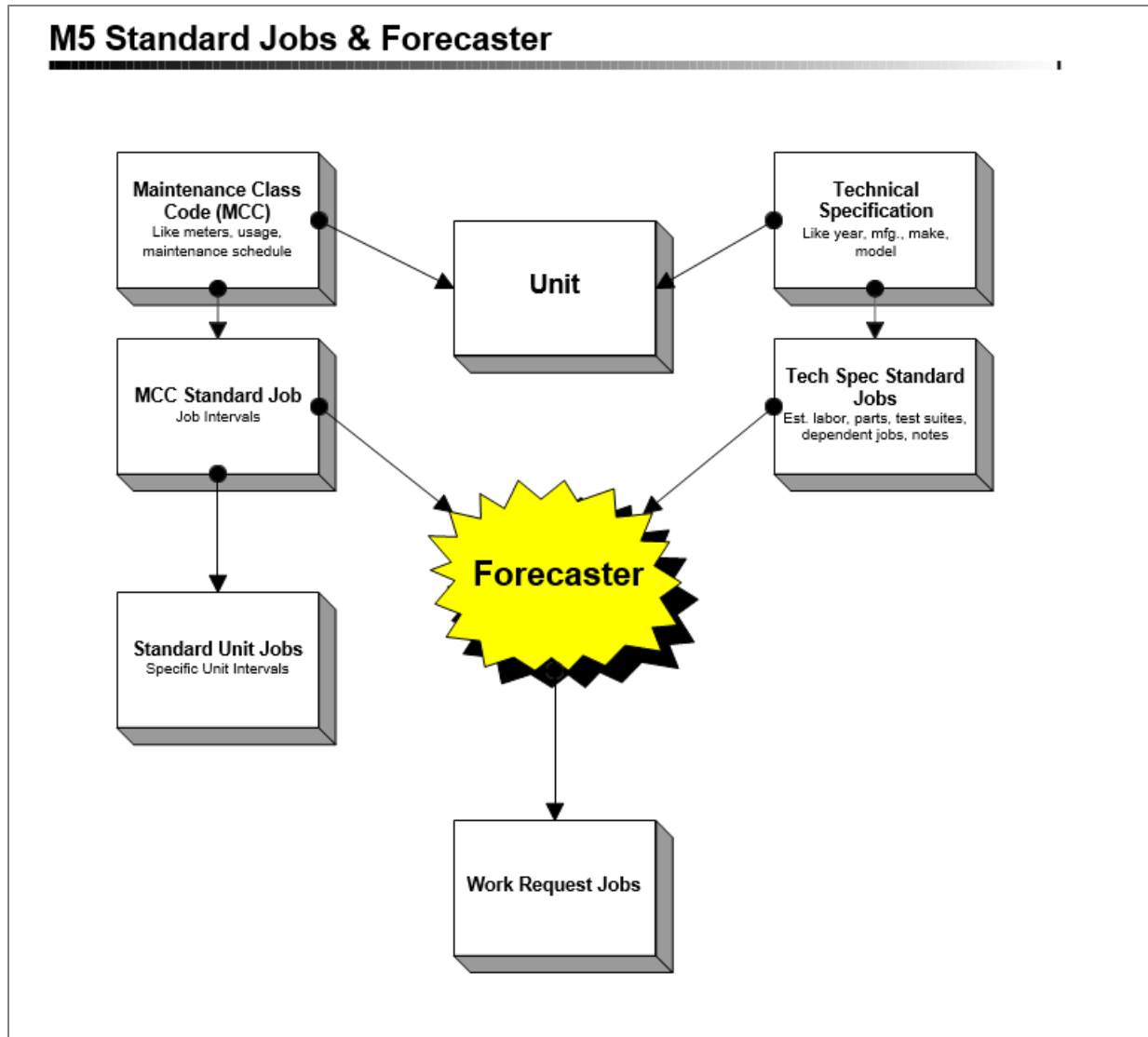
Field	Description	Notes
Unit	Enter or select the unit number for the unit on which the work is being performed.	Must be a valid unit from Unit Main.
Serial#/Vin	The unit's serial number or VIN number from unit main.	Read-only. Will automatically display if one exists.
Maintenance Location	The current maintenance location of the unit.	Read-only. This field will automatically display.

### Work Requests i-frame

Field	Description	Notes
Job	One job code is assigned per work request. The job code is a combination of the work accomplished code, system code and component code. It defines what type of work will be done to the unit.	N/A
Job Reason	The visit reason explains the job needs to be performed to the unit or the cause.	For example, P – Preventative.
Maintenance Location	The unit's maintenance location from unit main.	This field will automatically display but can be changed if necessary.

<b>Field</b>	<b>Description</b>	<b>Notes</b>
Earliest Date	The earliest date the work request can be performed.	N/A
Due Date	The due date of the work request.	N/A
Latest Date	The latest date the work request should be performed.	N/A
Est Cost/Job	The total estimated cost for labor, parts and commercial charges to perform the job.	See System Flag 5403.
Direct Charge Account	Direct account that should be charged for the job.	
Ext Data	External data may be required on a work order job and it can be entered here.	This is configured on the Job Reason screen. This is a free form field, limited to 15 alphanumeric characters.
Notes	Notes for the work request. The notes will be moved to the job notes after the work request is added to the work order.	N/A
Complaint Note	Only displays if System Flag 5234 is set to Y. Enter the complaint.	N/A
Cause Note	Only displays if System Flag 5235 is set to Y. Enter the cause of the job.	N/A


## Forecaster



### Overview

The forecaster is a batch process in M5 that will predict when a standard job is due for a unit, department, or component. The forecaster takes the “when” of the *Standard Job MCC* and the “how” from the *Standard Job Tech Spec* to create work requests with a future due date.

The date is calculated based on a time interval (applies to units, departments, and components), a unit’s primary meter usage, a unit’s secondary meter usage, and a unit’s fuel consumption. The standard job must be set up prior to running the forecaster in order to have work requests generated.

 Please see the *Forecaster Application User Guide* for a more in depth review of this functionality.

### Data Setup

In order to forecast preventive maintenance with FleetFocus M5, you need to have the following steps completed:

- Review Forecaster Related System Flags.
- Create maintenance class codes.
- Create technical specifications.
- Assign a maintenance class code to a unit/component/department.
- Assign a technical specification to a unit/component/department.
- Create a standard job schedule for a maintenance class code. The information on the MCC Standard Job frame tells the forecaster how often the job needs to be performed.
- Establish standard job hours and parts for a technical specification. For each preventive maintenance job that you want the system to forecast, you may want to establish an estimated labor and part cost for job.
  - The Tech Spec Standard Job Information frame provides the user with an estimated number of hours and employees needed to perform the job, and a list of standard parts for the job and standard job notes.
  - Labor hours and part costs are calculated during the forecaster process and can be displayed on Work Order Main or the Work Request Main frame. A list of technical specifications associated to a standard job can be displayed on the Standard Job MCC frame.

- Create a unique standard job schedule for a unit/component/department (optional) using the Standard Job Unit Schedule frame.
  - The final piece of information needed to forecast a standard job is the last date, last usage and last fuel for each unit for each standard job.
  - These values will be updated each time the standard job status is set to “DON” on the Labor Wedge or Work Order Main frames.
- Enter starting points for forecasting (completed by system administrator).

## 4. Work Order Processing

### Work Order Life Cycle

There are four work order statuses: Open, Complete, Closed and Cancelled.

**Open:** In the open status (O status), a unit is considered out-of-service and accumulating maintenance downtime and can be accumulating operational unit downtime. In this status, you can post labor, parts and commercial charges against the work order.

**Completed:** In the completed status (D status), all work should be finished on the work order and the unit is placed back in service (unit downtime stops). For standard jobs, if the job status is set to DON, a job completed date is posted to the unit's schedule record.



The **Forecaster** uses this last completion date as a starting point for determining the next occurrence of the standard job and assigning work occurrence numbers. You can still post labor, part, and commercial charges to a completed work order.

**Closed:** A work order can be placed in the closed status, (C status), any time after it has been completed. You cannot close a work order if there is a part purchase ordering pending, an outstanding vendor repair or someone is currently charging labor against the work order.

**Cancelled:** A work order can be cancelled (X status). However, you cannot cancel a work order if there are any charges made to the work order. If there are charges, they need to be backed out.

## Work Order Main

There are several ways to create a work order in M5. *Work Order Main* is the primary option for creating work orders, but the *Work Order Express* and *Commercial Work Order* frames are also available for the creation of work orders.

### Work Order Main – Basic Navigation

The screenshot displays the 'Work Order Main' interface. At the top, there are action buttons: SAVE, UNDO, REFRESH, DELETE, FIND, MORE (with a dropdown arrow), and RELATED (with a dropdown arrow). Below these is the 'Work Order Main' title and a 'Work Order Filter' section with a 'Clear Filter' button. The 'Work Order Search' section includes a checkbox for 'Show Closed Work Order(s) Since 12/24/2018:' and a text input field containing '2780'. A horizontal tab bar below the search section contains tabs for General, Job, Labor, Part, Comm, and Fluid. The main content area is divided into several panels: 'Work Order Information' with fields for WO Number, WO Status, Location, Unit Condition, and Employee No.; 'Visit Information' with fields for Reason, Open, Completed, Closed, Due, and Downtime, and a 'Complete' button; 'Meter Information' with fields for LTD Open Usage, LTD Maint Cost, and YTD Maint Cost; 'Contact Information' with fields for Name, Phone, Ext, and buttons for 'Notified' and 'Pickup'; 'Cost Summary' with fields for Limit, Labor, Material, Comm, Total, and Total Est Cost; and 'Equipment Information' with fields for Equipment Condition and Bin No.

### Work Order Filters

Field	Description	Notes
Filters	The plus and minus icons allow users to expand or hide the word order filter fields. The clear button will erase all filter information so new search criteria can be entered.	
Search By	Options are Unit, Work Order, Component, and Department. This controls either how work orders will be retrieved or for what entity the work order will be created for.	Can also search by Alternate Unit Number if System Flag 5102 is set to Y.
Show Closed Work Orders Since	Checkbox.	Available if System Flag 5063 is set to Y.



**General tab**

**Work Request Hyperlinks**

Field	Description	Notes
Work Request List	This hyperlink will open a pop-up with any available work requests for the selected entity.	The number of available work requests will display parentheses at the end of the hyperlink ().
Work Request Plan List	This hyperlink will open a pop-up with any available work request plans for the selected entity,	The number of available work request plans will display parentheses at the end of the hyperlink ().

**Work Order Information**

Field	Description	Notes
Unit/Department/Component	The appropriate number that corresponds to the work order entity will display here.	Will depend on selection made in the filter section.
WO Number	Work Order number displays.	System Flag 1059 determines a system wide or location range numbering system for work orders. Work order numbers can also be entered manually.
Status (Unit, Component, Department)	The status of the entity chosen displays.	
VIN, Serial Number, Requisition	For units, the VIN number will display. For components, the serial number will display. For departments, the requisition number will display.	These values will only display if available or associated with the entity. If nothing is assigned the field will be blank.

**Visit Information**

Field	Description	Notes
Reason	Work order visit reason, for example P – Preventative. This applies to unit and component work orders. For department work orders, a requisition must be entered.	

Field	Description	Notes
Open Date	The date the work order was opened. This will automatically display with the current date and time, but it can be changed.	System Flag 5127 determines how many days back an open date can be set to. The default value is 30.
Completed Date	When the work order is marked complete.	
Closed Date	Date the work order was closed.	
Due Date	Due date for the work order to be completed by.	
Due Date Change Reason	If the due date needed to be changed, a reason for the change must be entered.	
Downtime	Hyperlink to display unit downtime.	The downtime start date and time will display here. If the user has the privilege, <b>WOUNITALL – DOWNTIME</b> , they can suspend or unsuspend downtime using this hyperlink.
Est. Complete	Est. completion date.	
WO Reference	WO Reference number.	
Parking Space	Unit/Component parking space.	
Parking Spot	Unit/Component parking spot.	System Flag 5236 determines the visibility and use of this field.

**Meter Information**

Field	Description	Notes
Meter 1	Meter reading for meter one.	System Flags: 2064, 2065, 2076, 2095, 2105, and 5091 determine meter entry requirements on Work Orders. Meter warnings can also occur. If the “Override the Meter” meter warning displays, the user will have to have the role privilege, <b>OVERRIDE METER WARN</b> to proceed. Not all units have both meters, this will depend on the MCC classification.
Meter 2	Meter reading for meter two.	See above.

Field	Description	Notes
LTD Open Usage	Life to date open usage.	Displays the life to date usage value as of the time the work order is opened.
LTD Maint. Cost	Life to date maintenance costs.	
YTD Maint. Cost	Year to date maintenance costs.	

**Contact Information**

Field	Description	Notes
Name	Automatically displays if there is a contact person and information filled out and assigned to the entity's using department. This information can be changed on the work order.	
Phone	Automatically displays if there is a contact person and information filled out and assigned to the entity's using department. This information can be changed on the work order.	
Ext.	Automatically displays if there is a contact person and information filled out and assigned to the entity's using department. This information can be changed on the work order.	
Notified (Hyperlink)	This can be used to notify a contact person that the unit is ready for pickup and to document that the person was notified.	
Pickup (Hyperlink)	See above.	

**Cost Summary**

Field	Description	Notes
Limit	Total cost limit for the work order.	This will only display if a value has been set on the Unit Accounting frame.
Labor, Material, Commercial, and Total	Costs charged to the work order.	This includes any labor, material, and commercial charges and the total will be displayed here on the general tab. If the total exceeds the limit mentioned above, the field will be highlighted in red.

Field	Description	Notes
Total Est. Cost and Hours	Total estimates for cost and hours will display here.	System Flag 5023 controls the display of the estimated cost field.
Equipment Condition	Values 0-9 to describe the condition of a piece of equipment.	Part of the licensed Equipment module in M5.

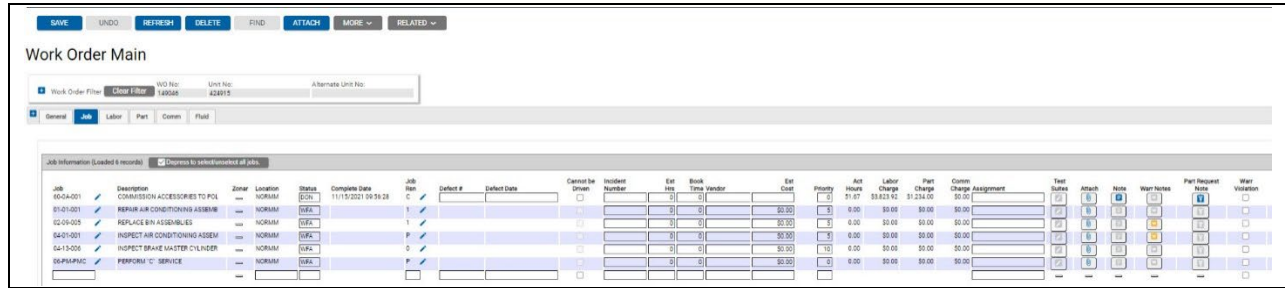
**Miscellaneous**

Field	Description	Notes
		The hyperlinks in this section will display No in front of the description if no information exists. If information exists, the description will be displayed as a hyperlink.
Hyperlink: Reserve Parts	This hyperlink will open the Part Reserve frame. It will only be available if reserve parts exist. Hyperlink will be in RED when the reserve parts are received in GREEN if still on order.	
Hyperlink: Parts Request	This hyperlink will be highlighted to inform the user that there are associated Part Requests for the unit.	
Hyperlink: Fault Codes	This hyperlink will launch the Telematic Fault Query frame.	
Hyperlink: Associated Tech Spec Info	This hyperlink will open a window displaying any associated units based on associated tech specs.	
Hyperlink: Warranty Claims	This hyperlink will open the Warranty Claim Manager frame.	
Hyperlink: Linked jobs	This hyperlink will display other jobs linked to the work order.	


## Job tab

In addition to adding jobs to the work order from the **General** tab when creating or opening the work order, you can also add jobs individually by using the Jobs tab. Any previously added jobs will also display here.

Within the *Job Information* i-frame you can select the **Depress to select/unselect all jobs.** button. This button will select or unselect jobs that are to be included within the print options launched from the *Work Order* frame.



Field	Description	Notes
Job	This field will display the job code comprised of the WAC/System/Component codes which is the information from work requests assigned to the work order or jobs added manually using the list of values (LOV).	<p>System Flags 5303 determines whether the system will prompt the user to verify the job being entered will be entered from a pending work request (if one exists).</p> <p>To view outstanding work requests for the entity, right-click in the <b>Job</b> field to display a tooltip list of available jobs. You can select a job to add it.</p> <p>After the job is added a <b>Pencil</b> icon will appear next to the <b>Job</b> field. You can select on this to display specific job details.</p> <p><b>ADD JOB TO CMPL WO</b> privilege allows users to add job to work orders in completed status.</p>
Description	The description will automatically display based on the WAC/System/Component code combination.	
Zonar	Related specifically to Zonar Telematic integration.	
Location	This value will default to the location where the work order was opened.	If you are using facility work orders, which is controlled by System Flag 1062, you will be able to change this value.

Field	Description	Notes
Status	Job status.	This is the status of the job. If a default job status has been entered on the job's location (by using the <i>Location Main</i> frame), it will automatically display here. Hovering over the status, such as WIP, will display a tooltip with the status description, such as Work In Progress.
Complete Date	Date the job was completed.	When the job status is changed to <b>DON</b> , the complete date will automatically populate with the ability to be changed.
Job Reason	The reason the job is being performed, such as P – Preventative.	To edit the job reason, select the <b>Pencil</b> icon to the right of the field. The user must have the <b>CHG JOB VISIT REASON</b> privilege.  This functionality should be used with caution.
Incident Number	Work Request Incident number.	If the job is associated with a previously associated work request incident number it will display here. You can also assign an incident number to the job from the list of values (LoV).
Estimated Hours	Estimated hours for completion of the job.	If the job is a standard job with estimated hours or if the job came from a work request where estimates were entered, the hours will display in the <b>Labor Time</b> field. The estimate can be changed (provided the user has the <b>WO-OPEN ESTIMATES</b> or <b>WO-COMP-CLO ESTIMATE</b> privileges) if necessary. The estimated hours can be added manually for any job added to the work order. This would designate the total time to do the work.
Book Time	Displayed in hours.	These are the hours that will be used if the billing code is set to bill estimates.

Field	Description	Notes
Vendor	This must be a valid vendor in M5 setup on <i>Vendor Main</i> .	Represents the vendor who has provided the estimate and if authorized vendor logic is used, will default on the <b>Commercial</b> tab.
Estimated Cost	Estimated costs associated with the job.	<p>If the job is a standard job with estimated costs or if the job came from a work request where estimated costs were entered, the costs will display in the <b>Est Cost</b> field.</p> <p>The estimate can be changed if necessary. The user must have the role privilege, <b>WO-OPEN ESTIMATES</b>, to enter a cost estimate for the job when the WO is in open status. The user must have the role privilege, <b>WO-COMP-CLO ESTIMATE</b>, to enter or modify a cost estimate for the job when the WO is in either the complete or closed status. This is a job estimate to include labor, parts and commercial charges.</p>
Priority	Priority value of the job, this is a value from 0-9. This is an optional field.	These codes are configured by the user on the <i>Job Priority</i> frame and can be used with SRTs (Standard Repair Times) on Standard Jobs.
Actual Hours	Actual labor hours logged on the job.	As hours are logged, they will update and display here.
Labor Charge	Job costs for labor will display as they are charged to the job.	<b>Note:</b> The labor charges are based on employee payroll rate and any markup schemes or tax schemes that may be in effect.
Part Charge	The costs for parts associated with the job will display here.	Markup and tax rates can also apply here.
Commercial Charge	Any commercial charges associated with the job from outside vendors will display here.	Markup and tax rates can also apply here.
Assignment	Employee or Employee Group assignment can be entered here.	If System Flag 5064 is set to Y, this field will be required. Works in conjunction with System Flag 5237 and the <i>Labor Wedge</i> frame.

Field	Description	Notes
Attachments	This icon can be used to view and upload attachments to the job.	If attachments exist, the icon will display in a blue circle around the paper clip.
Notes	This icon can be used to view and add notes to the job.	If notes exist, the icon will be blue. Otherwise the icon will be greyed out. If System Flag 5495 is set to <b>Y</b> , job notes are mandatory to set a job's status to <i>DON</i> . (Applies to <i>WO Express</i> and <i>Labor Wedge</i> ).
Warr Notes	This icon opens the <i>Warranty Violation</i> frame.	You will have the option to Update Warranty Notes or Cancel the Warranty provided they have the necessary privilege ( <b>WARR CANCELLATION</b> ). System Flags 2066 and 2067 determine whether or not notes are mandatory. The icon will display in a yellow color if notes already exists, otherwise the icon will be greyed out.
Part Request Note	This icon can be used to view part request notes.	If notes exist, the icon will be blue. Otherwise the icon will be greyed out. If System Flag 5519 is set to <b>Y</b> , you can access Part Request Notes for a job through the Job tab.
Warr Violation	This checkbox can be selected by the user to mark the job as a warranty job.	It will be set automatically if the job is already marked as warranty job. This is determined by the Job Reason code.
Print	The <b>Print</b> checkbox can be used to mark certain jobs so that the system will only print those jobs when the work order is printed.	The checkbox is selected by default.
Bill Fixed	This checkbox allows the user to charge a fixed price by job.	There is a field on both the <i>Billing Codes</i> and <i>Unit/Dept Billing Codes</i> frames- <b>When to bill estimates</b> that supports this functionality.
Ext Data	External data may be required on a work order job and it can be entered here.	This is configured on the <i>Job Reason</i> frame. This is a free form field, limited to 15 alphanumeric characters.



Field	Description	Notes
Project Code	This field allows for tracking of costs associated with a project.	System Flag 5430 controls whether this functionality is enabled. System Flag 5428 controls the validation.
Accident Number	If the job is associated with an accident, the accident number can be entered or displayed.	<p>System Flag 5194 controls the validation of this field. If the flag is set to <b>Y</b>, it has to be a valid number from Accident Entry.</p> <p>System Flag 5196 controls the requirement of this field. The options are Always, Option, and Never when the user moves the job to DON. The job reason must be designated as an Accident reason.</p> <p>System Flag 5195 controls the number of days back accidents will still display on the list of values (LoV).</p>
Direct Charge Account	A direct charge account can be entered.	

## Labor tab

Labor entries being charged to the work order can be entered, viewed and adjusted no matter what frame was used to enter the labor. Other places to enter labor to a work order are the Employee Time Card, Touch Screen and the *Labor Wedge* frame.

Job	Description	Employee No	Name	Position	Time Date/Time In	Date/Time Out	Time Type	Pay Class	Pay Step	Supervisor Approval	Labor Note
03-02	REMOVE/REPLC CAB & SHEET MET	00001	BILL SMITH		12/21/2015 06:00:00	12/21/2015 11:00:00	RT	1	01	<input type="checkbox"/>	

Field	Description	Notes
Job	This field will display the job code, comprised of the WAC/System/Component codes. Only jobs added by using the job tab will display here and in the list of values (LoV).	You can right-click in the field to display a tool tip with the available jobs rather than launching the list of values.
Description	The description will automatically display based on the WAC/System/Component code combination.	
Employee Number	This value is the employee who performed work on the job.	It must be a valid employee number in M5 from <i>Employee Main</i> . System Flag 2036 determines who can enter labor chargers.
Name	The employee's name will display automatically with the information from <i>Employee Main</i> .	
Position Code	These values are used to denote the area or position on the vehicle where work was performed in relation to the job.	System Flag 5016 determines whether or not these codes are required.

Field	Description	Notes
Time	This value is the number of hours spent on the job.	System Flag 5005 determines how time is entered. If it is set to <b>N</b> , time is entered as hours in this field and the following two fields will automatically display.
Date/Time In	Date and time the job was started.	If System Flag 5005 is set to <b>Y</b> , the employee's shift start time will be recorded here.
Date/Time Out	Date and time the job was finished.	If System Flag 5005 is set to <b>Y</b> , the employee's shift end time will be recorded here.
Time Type	Time Types are used to record different types of labor for payroll processing.	System Flag 5003 determines whether this value and the following two values are captured during the Labor Entry Process.
Pay Class	Pay classes and pay steps are used to further define a structure for compensation for payroll processing.	See the note in <b>Time Type</b> .
Pay Step	Pay classes and pay steps are used to further define a structure for compensation for payroll processing.	See the note in <b>Time Type</b> .
Supervisor Approval	This indicates whether the labor charge has been approved by a supervisor or not (if necessary).	
Labor Note	This icon can be used to view or enter a labor note. This note is specific to the employee. The icon will appear blue if there are existing notes, otherwise it will be inactive and greyed out.	It is not related to the job or work order notes. The note can be used to denote why it took a certain amount of time to complete a job or why the employee had to leave early.

## Part tab

Both stock and non-stock part charges can be added and adjusted in separate sections. Reserved parts can also be issued to the work order by using the **Reserve Parts (x)** buttons at the top of each i-frame.

Parts charged or returned to the work order from the *Part Issue* and *Part Return* frames will display. If there are any standard jobs on the work order and if those standard jobs had parts listed, those parts will display if System Flag 5109 is set to **Y**.

## Material Calculations

Field	Description	Notes
Inventory Location	This value will be the inventory location for the maintenance location of the work order.	This will play a role in how charges are calculated depending on how markups and taxes are configured.
Total Cost	The total cost for parts associated with the work order.	
Total Tax	The total tax on parts associated with the work order.	
Total Discount	The total discount amount on parts associated with the work order.	
Total Extended Cost	The total extended cost for parts associated with the work order.	

**Stock Part Charge Information**

Field	Description	Notes
Job	The specific job on the work order that the part is being charged to, should be entered here.	The user can right-click or select from the list of values.
Description	This will display automatically based on the job selected.	
Part Number	The part number from <i>Part Main</i> should be entered here.	There must be a quantity on hand and it must exist at the location as a part on the <i>Part Inventory Location Manager</i> frame.
Effective Date	The date will default to current date and time, but can be changed to a date in the past as long as it is after the work order open date.	
Employee Number	A valid employee number can be entered here or selected from the list of values.	If System Flag 5013 is set to <b>Y</b> , this field is required.
Quantity	The number of the specific part being used for the job.	
Unit Cost	The unit cost will display automatically based on the inventory record price and cannot be changed for stock parts.	The price can be entered or changed for non-stock.
Core Cost	Enter the cost of the core if non-stock. A cost can only be entered if the part is designated as a core part on the <i>Part Inventory Location Manager</i> frame. If it is a stock core, then the cost will automatically display.	
Apply Discount %	If there is a vendor discount for the part, it can be entered here.	This field will only display if System Flag 5019 is set to <b>Y</b> .
Extended Cost	The extended cost includes the markup, taxes, discount and core charge.	Influenced by System Flags 5025, 5130, 5131, 5019, and 5209.
Print Tag	This checkbox allows for printing of a part warranty or core tag.	The number of days to retain tagged warranty parts is determined by System Flag 5191.
Charge Code	This checkbox will be selected if the core is designated as a core with core charge on the <i>Part Inventory Location Manager</i> frame.	

Field	Description	Notes
Fail Code	The failure code is used to denote a failure reason for installing the part.	If System Flag 5015 is set to Yes, then this field will be required.
Reference Number	A reference number can be entered here to provide additional data.	
PRO Number	The <b>PRO Number</b> is used to track shipments that the parts are included in.	This number is used on multiple frames and queries for tracking or reporting purposes.
Position	A position code to denote the position on the unit where the part is being installed can be entered here.	If System Flag 5016 is set to <b>Y</b> , this field will be displayed.
PO Line	If System Flag 5054 is set to <b>Y</b> , this field will display.	
Lot Entry	If System Flag 5224 is set to <b>Y</b> , the <b>Lot Entry</b> field will display.	
Print Ticket	The print checkbox can be used to print part tickets.	
Warranty Terms	If a part has warranty terms, these will display here.	The user can also create warranty terms.
Approve	This checkbox approves the issue of the part to the work order job, if necessary.	

**Non-Stock Part Information**

<b>Field</b>	<b>Description</b>	<b>Notes</b>
Job	The specific job on the work order that the part is being charged to, should be entered here.	Right-click or select from the list of values.
Description	This will display automatically based on the job selected	
Part Number	The part number from part main should be entered here.	There must be a quantity on hand and it must exist at the location as a part on the <i>Part Inventory Location Manager</i> frame.
Effective Date	The date will default to current date and time, but can be changed to a date in the past as long as it is after the work order open date.	
Vendor	The vendor for the non-stock part.	Must be a valid vendor in M5 from <i>Vendor Main</i> .
Employee Number	A valid employee number can be entered or selected from the list of values.	If System Flag 5013 is set to <b>Y</b> , this field will be required.
Quantity	The number of the specific part being used for the job.	
Unit Cost	The unit cost will display automatically based on the inventory record price and cannot be changed for stock parts.	The price can be entered or changed for non-stock.
Core Cost	Enter the cost of the core if non-stock. A cost can only be entered if the part is designated as a core part on the <i>Part Inventory Location Manager</i> frame. If it is a stock core, then the cost will automatically display.	
Apply Discount %	If there is a vendor discount for the part, it can be entered.	This field will only display if System Flag 5019 is set to <b>Y</b> .
Extended Cost	The extended cost includes the markup, taxes, discount and core charge.	Controlled by System Flags 5025, 5130, 5131, 5019, and 5209.
Print Tag	This checkbox allows for printing of a part warranty or core tag.	The number of days to retain tagged warranty parts is determined by System Flag 5191.

Field	Description	Notes
Charge Code	This checkbox will be selected if the core is designated as a core with core charge on the <i>Part Inventory Location Manager</i> frame.	
Fail Code	The failure code is used to denote a failure reason for installing the part.	If System Flag 5015 is set to Yes, then this field will be required.
Contract No.	If the part is part of a vendor contract the contract number can be entered here.	You can double-click in the field to select a contract that matches the part number and vendor combination.
Reference Number	A reference number can be entered here to provide additional data.	
PRO Number	The <b>PRO Number</b> is used to track shipments that the parts are included in.	This number is used on multiple frames and queries for tracking or reporting purposes.
Invoice Number	An invoice number can be entered here.	
Position	A position code to denote the position on the unit where the part is being installed can be entered here.	If System Flag 5016 is set to <b>Y</b> , this field will be displayed.
PO Item	A purchase order item can be entered or selected here.	
PO Line	If System Flag 5054 is set to <b>Y</b> , this field will display.	
Lot Entry	If System Flag 5224 is set to <b>Y</b> , the <b>Lot Entry</b> field will display.	
Print Ticket	The print checkbox can be used to print part tickets.	
Warranty Terms	If a part has warranty terms, these will display here.	You can also create warranty terms.
Approve	This checkbox approves the issue of the part to the work order job, if necessary.	



## Commercial tab

The **Comm** tab is used to enter any commercial charges (for example, labor, or part) for the work order jobs. Commercial work is typically work that is performed by an outside or third-party vendor. This tab allows for the tracking of this type of work and the charges associated with it.

The screenshot shows the 'Work Order Main' interface. At the top, there are buttons for SAVE, UNDO, REFRESH, DELETE, FIND, ATTACH, MORE, and RELATED. Below these is a search bar with 'Work Order Filter', 'Clear Filter', 'WO No: 553115425', 'Unit No: 2760', and 'Alternate Unit No:'. A navigation bar includes 'General', 'Job', 'Labor', 'Part', 'Comm', and 'Fluid'. The 'Commercial Calculations' summary shows: Total Labor: \$0.00, Total Part: \$0.00, Total Misc: \$0.00, Total Tax: \$0.00, Total Cost: \$0.00, and Total Cost With Markup: \$0.00. Below this is a table for 'Commercial Charge Information (Loaded 0 records)' with columns: Job, Description, Service Code, Vendor, Date, Ref No/Contract No, Inv No, PO No, Labor Hours, Labor Rate, Labor Amt, Part Amt, Misc Amt, Tax Amt, and Total Amt. At the bottom, there is a section for 'Authorized Amounts (Loaded 0 records)' with columns: Job, Description, Vendor, and Amount.

## Commercial Calculations

Field	Description	Notes
Total Labor	Total for labor charges.	This field will update automatically as charges are added to the work order.
Total Part	Total for part charges.	This field will update automatically as charges are added to the work order.
Total Misc	Total for miscellaneous charges.	This field will update automatically as charges are added to the work order.
Total Tax	Total tax applied to commercial charges.	This field will update automatically as charges are added to the work order.
Total Cost	Total commercial costs.	This field will update automatically as charges are added to the work order.
Total Cost With Markup	Total commercial costs plus any applicable markups.	This field will update automatically as charges are added to the work order.



**Commercial Charge Information**

<b>Field</b>	<b>Description</b>	<b>Notes</b>
Job	The specific job on the work order that the commercial charges apply to should be entered here.	Right-click or select from the list of values.
Description	This will display automatically based on the job selected	
Vendor	The vendor number providing the service should be entered here.	
Date	The date the service was performed.	It cannot be before the work order opened date. Date is dependent on System Flag 5080 which determines if the date defaults to the work order open date.
Reference No./Contract No.	A reference number can be entered simply for record keeping purposes OR a valid contract number can be entered or selected from the LoV.	Awarded Purchase Order contracts for the vendor entered will display on the list of values.
Invoice Number	The invoice number given from the vendor.	
PO Number	The purchase order number associated with the vendor services.	System Flag 2031 determines whether a PO will be automatically generated or manually entered.
Labor Amount	The total cumulative labor charges for performing the work on the job.	
Part Amount	The total cumulative part charges for performing the work on the job.	
Miscellaneous Amount	Any miscellaneous charges from the vendor.	
Tax Amount	Any taxes incurred on the work performed.	
Total Amount	Total calculated amount for labor, parts, miscellaneous, and tax markups.	
Position	Position code can be entered here.	System Flag 5016 controls the display of this field.
Lock Vendor/PO	Will lock all rows for the same vendor or purchase order combination to prevent further before the work order is closed.	Customer-specific.

### Authorized Amounts

Field	Description	Notes
Job	The specific job on the work order that the commercial charges apply to should be entered here.	Right-click or select from the list of values.
Description	This will display automatically based on the job selected	
Vendor	The vendor number that is providing the service.	Must be a valid vendor in M5 from <i>Vendor Main</i> .
Amount	Enter the dollar value the vendor is authorized to spend on the service.	To enter this information, you must have the <b>UPD AUTH COMM AMT</b> privilege.

### Authorizing Vendors for Commercial Work

-  System flag 5240 determines whether M5 should enforce the commercial charges to be within the authorized amount. You must have the role privilege, **UPD AUTH COMM AMT**, in order to enter the vendor's authorized amount on the **Commercial** tab of the work order. If you have the privilege, you can enter as many vendor authorizations as needed in the *Authorized Amounts* section.
-  If System Flag 5240 is set to **Y** and you enter invoice information that exceeds the authorized amount or is not an authorized vendor, an error message will display.

## Fluid tab

M5 can apply fluid charges (for example, fuel products) to jobs on the work order. Products, tanks, and hoses for the associated fluids must be set up in the fuel module of the application before they can be entered here. If you have the privilege **WOUNITALL- FLUID**, you will be able to enter fluid charges on this tab.

Field	Description	Notes
Job	The specific job on the work order that the fluid charges apply to should be entered here.	Right-click or select from the list of values.
Description	This will display automatically based on the job selected.	
Job Location	The location of the job for the work order.	
Issue Date	This field will automatically populate with the current date and time.	You can also enter or select a date and time manually.
Hose	The hose number associated with the fluid being issued.	Must be a valid code already setup in M5.
Product	Enter the product number associated with the type of fluid being issued.	Must be a valid product code and associated with the hose entered.
Quantity	Enter the quantity of fluid (for example, gallons or quarts).	
Unit Cost	This is the cost per unit (for example, gallon) for the fluid.	
Extended Cost	Total cost based on quantity issued.	
Employee	Enter a valid employee number to identify the employee issuing the fluid.	

## Commercial Work Orders

A commercial work order is used for batch style entry of commercial work for units only. It is designed to quickly create a work order, add jobs or enter commercial charges in one step.

From this frame, you can create purchase order numbers to use for vendor repair and work orders can be printed from this page. It also uses vendor repair statuses and functionality.

Work Requests can also be assigned to a commercial work order from this frame.

### Unit Information

Field	Description	Notes
Unit No	Enter or select the unit number for the unit on which the work is being performed.	Must be a valid unit in M5 from Unit Main.
Alternate Unit No.	This number will populate automatically with data from the <i>Unit Main</i> record.	
Tech Spec	The tech spec will populate automatically based on the <i>Unit Main</i> record.	

Field	Description	Notes
VIN	The VIN will populate automatically based on the <i>Unit Main</i> record.	
View Warranty Coverage	Link that opens the <i>Warranty Unit Setup</i> frame to view warranty coverage.	
View Unit Job History	Link that opens the <i>Work Order Query</i> frame to view unit job history.	
Work Request Incident	Link that opens the <i>Work Request Incident</i> frame.	You can create a work request incident for the unit here.
View Standard Job History	Link that opens the <i>Unit Standard Job Schedule</i> frame to view standard job history.	
View Commercial WO History	Link that opens the <i>Work Order Commercial Charge Query</i> frame to view commercial work order history.	
Work Request Incident Query	Link that opens the <i>Work Request Incident Query</i> frame.	

### Work Order Information

Field	Description	Notes
Work Order	Link that opens the <i>Work Order Main</i> frame.	
New WO	To create a new work order, select the <b>New WO</b> button.	You can enter or select an existing work order using the list of values.
Location	The work order location should be entered here.	If you are selecting an existing work order, this will populate automatically.
WO Reason	Work order visit reason, for example P – Preventative.	
Status	The work order status.	
Open Date	The date the work order was opened. This will populate automatically with the current date and time, but it can be changed.	System Flag 5127 determines how many days back an open date can be set to. The default value is 30.
Due Date	Due date for the work order to be completed by.	

Field	Description	Notes
Completed Date	When the work order is marked complete.	
Closed Date	Date the work order was closed.	
WO Reference	Reference number for the work order.	
WO Lead Job Status	The leading job is highest ranking job on the work order in terms of priority.	Part of the Booking Appointments module.
View All Jobs on Work Order	Link that opens the <i>All Jobs On Work Order</i> frame to view all jobs on the work order.	
Meter 1	Current meter information can be entered here.	Meter types are determined by the unit's MCC.
Meter 2	Current meter information can be entered here.	Meter types are determined by the unit's MCC.

### Vendor Information

Field	Description	Notes
Vendor No	Enter the vendor performing the work.	Must be a valid vendor from Vendor Main.
PO Number	Enter the PO number or if System Flag 2031 is set to Yes, the PO number will be automatically generated.	
Auth Amt	Enter the authorized amount or if a contract for the vendor already exists, this will populate automatically.	
Contract	Enter the vendor contract or if a contract already exists, this will populate automatically.	
Phone	Enter the vendor's phone number.	
Ext	Enter an extension, if applicable.	
Charges Submitted Date	Enter the date the charges were submitted.	
Completed Date	Enter the date the work was completed.	

Field	Description	Notes
Status	Status of the vendor work.	When creating, the <b>Status</b> will be <i>BUILD</i> and upon saving the <b>Status</b> will move to <i>AT VENDOR</i> . When you enter a <b>Completed Date</b> , the <b>Status</b> will change to <i>COMPLETED</i> .
At Vendor Date	This date will default to the current date and time after you select <b>SAVE</b> for the first time.	
Ordered By	This value will be the application user of the person who is signed in to M5 at the time of saving.	
Reference No	Reference number can be entered here.	
Invoice No	The invoice number from the vendor can be entered here.	Used with invoice reconciliation. If System Flag 5367 is set to <b>Y</b> , this will be required.
Invoice Date	Enter the date for the invoice.	Used with invoice reconciliation. If System Flag 5367 is set to <b>Y</b> , this will be required.
Charge WO Date	Enter the date that the charges are completed and can be added to the WO.	
Reconcile	Select <i>Yes</i> or <i>No</i> from the dropdown.	Used with invoice reconciliation. If System Flag 5367 is set to <b>Y</b> , this will be required.
Payment Type	The options are <i>Credit Card</i> , <i>Check</i> , or <i>PO</i> .	Used with invoice reconciliation. If System Flag 5367 is set to <b>Y</b> , this will be required.
Towing Amount	Towing charges associated with vendor work.	
Towing Label	The options are <i>Miles</i> , <i>Hours</i> , or <i>Kilometers</i> .	

### Job List for Vendor Number

Field	Description	Notes
Job	Enter a valid job code here.	
Rsn	Enter a valid job reason code.	



Field	Description	Notes
Incident Number	Enter or select an incident number from the LoV.	
Cost Est	Enter estimated costs.	Estimated costs may also populate automatically.
Plan Time	Enter the planned time for the job.	Planned hours may populate automatically. System Flag 5126 controls the display of this field.
Book Time	Enter the book time for the job.	These hours will be used if the billing code is set to bill estimates. System Flag 5126 controls the display of this field.
Labor Amt	Enter the actual labor amount.	System Flag 5126 controls the display of this field.
Part Amount	Enter the actual part charges.	System Flag 5126 controls the display of this field.
Add Part Chg	Link to add additional part charges.	System Flag 5300 controls this functionality.
Add Misc Amt	Enter the miscellaneous amount.	
Add Tax Amt	Enter the tax amount.	If System Flag 5402 is set to <b>Y</b> , this field will be a hyperlink.
Add Total Cost	The total cost will update automatically based on the other cost and charge values.	
Add Req No	Enter a requisition number if required.	If System Flag 5265 is set to <b>Y</b> , users are only allowed to enter numbers in the <b>Req No</b> field in the job portion of the Commercial Work Order. When the System Flag value is <b>N</b> , users are allowed to enter alphanumeric characters.
Position	Enter the position code for the part or job being performed.	
Status	The job status can be updated as needed while the work is being performed.	
Completed Date	Enter the date the work is completed here.	

Field	Description	Notes
Job Notes	Enter any notes pertaining to the job.	If notes exist, the icon will be blue. Otherwise the icon will be greyed out.
Warr Notes	As on work order main, you can enter warranty notes here.	<p>You will have the option to Update Warranty Notes or Cancel the Warranty provided they have the necessary privilege (<b>WARR CANCELLATION</b>).</p> <p>System Flags 2066 and 2067 determine whether notes are mandatory.</p> <p>The icon will display in a yellow color if notes already exists, otherwise the icon will be greyed out.</p>

## Work Request List

This section allows you to add existing work requests to the work order. The *Work Request List* i-frame displays basic information like the job code, description, visit reason, due date, location, hours, and cost.

To add a work request or multiple work requests, select the **Add** checkbox in the row of the work request you want to add. When finished, select the **SAVE** button at the top of the frame.

The screenshot shows two panels. The left panel, titled "Work Request List (Loaded 5 records)", contains a table with columns: Add, Job, Description, Visit Reason, Due Date, Location, Hrs, and Cost. The right panel, titled "Work Order Summary", contains a "Job Count" section with "Total: 0", "Done: 0", and "Allowing close: 0", and a "Charges" section with a list of items and their costs.

Add	Job	Description	Visit Reason	Due Date	Location	Hrs	Cost
<input type="checkbox"/>	01-01-001	REPAIR AIR CONDITIONING ASSEMBLY	1	12/10/2018	FM	0	\$0.00
<input type="checkbox"/>	02-02-001	INSPECT RADIATOR GRILLE	1	12/16/2015	FM	0	\$0.00
<input type="checkbox"/>	03-04-001	REMOVE/REPLC MOBILE DOCKING STATION	8	08/04/2014	FM	0	\$0.00
<input type="checkbox"/>	73-00-001	PREP SALE FOR SERVICE	I	05/24/2018	FM	0	\$0.00
<input type="checkbox"/>	CK-00-001	CHECK FOR SERVICE	P	08/19/2016	#1 LOC	0	\$0.00

**Work Order Summary**

**Job Count**

Total: 0 Done: 0 Allowing close: 0

**Charges**

- Labor Chg: \$0.00
- Part Chg: \$0.00
- Misc Chg: \$0.00
- Tax Chg: \$0.00
- WO Total Chg: \$0.00
- Total Est Cost: \$0.00


## Work Order Summary

The *Work Order Summary* section displays read-only information about the total job count and a breakdown of the charges associated with them.

## Work Order Express

The *Work Order Express* frame is a scaled down version of *Work Order Main* that allows you to create a work order while only filling out the minimum number of required fields. The frame is divided into four filter sections: *General*, *Labor*, *Part*, and *Commercial*.

When you access the frame, the top filter will display much like the filter outlined in the *Work Order Main* section. You can select the entity type for the work order (Unit, Department, or Component) and then enter or select the number from the list of values.

 You can also use the **Clear Filter** button to select a new entity or search for a new work order.

You can create a new work order or open an existing one. The + and – icons can be used to expand or collapse the *General*, *Labor*, *Part*, and *Commercial* sections. Each section can also be expanded or collapsed individually by using the ^ icon.

The following functionality is the available in the *Work Order Express* frame:

- Standard Job History - View work request, attachments and job notes.
- Warranty Violations, Warranty Notes – Complaint, cause and correction required if set by system flags.

- Test Suites.
- Ability to change the Visit Reason (with the proper privilege).
- Cancel the work order (with the proper privilege).

Similarly to *Work Order Main*, you can add jobs using the **Work Request List** hyperlink, if outstanding work requests exist, or you can enter the jobs manually in the job section.

Information in the *Labor, Part, and Commercial* sections would be entered or selected in the same way as on *Work Order Main*.

You can use the **Complete, Close, and Cancel** buttons in the *General* section to update the work order status as necessary.

## Work Order Close

The *Work Order Close* frame allows you to search for and close work orders in a **WO Status of Completed**. You can filter on a variety of selection criteria in the top section of the frame.


The screenshot shows the 'Work Order Close' interface. At the top, there are buttons for 'SAVE', 'UNDO', 'REFRESH', 'DELETE', 'FIND', and 'RELATED'. Below these is the 'Work Order Close' title and a 'Selection Criteria' section. This section includes dropdown menus for 'Unit', 'Location', and 'Job Exception' (set to 'None'). There is also a 'Work Order Complete Date Range' section with 'Start' and 'End' date pickers (12/24/2018 and 12/25/2019) and 'Clear' and 'Retrieve' buttons. Below the search criteria is a table titled 'Unit Query Results (Loaded 11 records)'. The table has columns for 'WO Close', 'WO No.', 'Unit No.', 'Open Date', 'Complete Date', 'Close Date', 'WO Location', 'WO Status', 'Job Code', 'Labor Hours', 'Labor Cost', 'Part Cost', 'Comm Cost', and 'Note'. The table contains 11 rows of data, each with a checkbox in the 'WO Close' column and a 'Note' icon in the 'Note' column.

WO Close	WO No.	Unit No.	Open Date	Complete Date	Close Date	WO Location	WO Status	Job Code	Labor Hours	Labor Cost	Part Cost	Comm Cost	Note
<input type="checkbox"/>	1004	CNCAR020	01/01/2010	09/30/2019		CNLOC2	Completed	01-01	1.5	\$0.00	\$0.00	\$27.70	[N]
<input type="checkbox"/>	533117639	JDC-UN-001	02/12/2018	10/28/2019		NORMM	Completed	01-14-001	0	\$0.00	\$22.00	\$0.00	[N]
<input type="checkbox"/>	533117716	JPD3	09/06/2019	09/06/2019		CNLOC1	Completed	01-10	0	\$0.00	\$205.70	\$214.00	[N]
<input type="checkbox"/>	533117716	JPD3	09/06/2019	09/06/2019		CNLOC1	Completed	01-02-004	0	\$0.00	\$0.00	\$0.00	[N]
<input type="checkbox"/>	533117748	CNUNIT02	09/01/2019	09/04/2019		CNLOC1	Completed	CN-01	2	\$80.00	\$0.00	\$0.00	[N]
<input type="checkbox"/>	533117748	CNUNIT02	09/01/2019	09/04/2019		CNLOC1	Completed	CN-02	0	\$0.00	\$52.31	\$0.00	[N]
<input type="checkbox"/>	533117748	CNUNIT02	09/01/2019	09/04/2019		CNLOC1	Completed	CN-03	0	\$0.00	\$0.00	\$70.00	[N]
<input type="checkbox"/>	533117748	CNUNIT02	09/01/2019	09/04/2019		CNLOC1	Completed	CN-04	0	\$0.00	\$31.68	\$0.00	[N]
<input type="checkbox"/>	533117753	JPD4	09/11/2019	09/11/2019		CNLOC1	Completed	01-10	0	\$0.00	\$0.00	\$374.50	[N]
<input type="checkbox"/>	533117957	DHRM011	12/06/2019	12/06/2019		FM	Completed	01-01-001	0	\$0.00	\$0.00	\$0.00	[N]

You must at least enter a date range to run this query. After entering your selection criteria, select the **Retrieve** button to run the query. The list of work order records that match your criteria will display on the *Query Results* i-frame.

Each record includes the Work Order Number (hyperlink) and corresponding Unit/Department/Component Number, Close Date (will fill in with the current date once WO Close flag is checked), WO Location, WO Status, Job Code, Labor Hours, Labor Cost, Part Cost, Comm Cost, and Notes.

To close a work order, select the **WO Close** checkbox at the beginning of the row and select the **SAVE** button at the top of the frame.

-  The same work order number can have multiple records for each different job on the work order. If you select the **WO No.** checkbox for one, the other records will be selected automatically.

To run a different query, select the **Clear** button in the *Selection Criteria* section to clear out your existing filters. Enter new selection criteria and select the **Retrieve** button to display the new results.

## Work Order Vendor Repairs

The *Work Order Vendor Repairs* frame allows you to track commercial repairs as they are being performed by the vendor so reports can be generated showing units out for service as well as how long they have been at the vendor.

SAVE
UNDO
REFRESH
DELETE
FIND
ATTACH
RELATED ▾

### Work Order Vendor Repairs

**Tracking Information**

Unit:  2015 E-350 11 PASS VAN

VIN:

Tag:

Work Order:

**Status and Dates**

Built:

At Vendor

Commit

Charge WO

**Vendor**

Number:

Contact:

Phone:  x

Invoice:  PO#:

Show all Jobs on WO:

Vendor Est:

**Contract Information**

Contract Ref:

Awarded:

Committed:

Balance:

[View Warranty Coverage](#)

533115426 Job Tracking (New record number 1)

Assigned	Job Code	Status	Estimate	Labor Amt	Part Amt	Misc Amt	Tax Ar
<input type="checkbox"/>	TOTALS		0	0	0	0	

## Tracking Information

Field	Description	Notes
Unit	Enter the unit number for which repairs are being tracked.	

Field	Description	Notes
VIN	The VIN will populate automatically based on the unit record.	
Tag	The tag will populate automatically based on the unit record.	
Work Order	Enter or select the work order number from the list of values.	

## Status and Dates

There are four statuses to a vendor repair: *Built*, *At Vendor*, *Commit*, and *Charge WO*. The statuses need to be changed as the unit enters each throughout the vendor repair. The final step is to charge the work order so that the vendor repair is closed and the charges made to the work order.

Field	Description	Notes
Built	When the work order is being prepared the status is Built.	
At Vendor	Select the checkbox if the unit is at the vendor.	
Completed	Select the checkbox if the work is completed.	
Charge WO	Select the checkbox to charge the work and close the work order.	

## Vendor

Field	Description	Notes
Number	Vendor number of the vendor performing the work.	Must be a valid vendor <i>from Vendor Main</i> .
Contact	Name of a contact person at the vendor.	
Phone	Enter a vendor phone number here.	
X	Enter a vendor phone number extension.	
Invoice	Enter the vendor invoice number.	

Field	Description	Notes
PO#	Enter a purchase order number that authorizes the vendor to perform the work.	M5 will not generate a purchase order number for vendor repairs. It is recommended to use the work order number as the purchase order number.
Show All Jobs on WO	Select the checkbox to show all work order jobs.	
Vendor Est	Enter the vendor's estimated cost to perform the work.	

### Contract Information

Field	Description	Notes
Contract Ref	This will be a free form field if System Flag 1158 is set to <b>N</b> . If it is set to <b>Y</b> , enter or select a valid contract number.	If System Flag 1158 is set to <b>N</b> , this will be the only field displayed in this section.
Awarded	This will display the awarded amount on the contract.	Will only display when System Flag 1158 is set to <b>Y</b> .
Committed	This will display how much has been spent against the contract.	Will only display when System Flag 1158 is set to <b>Y</b> .
Balance	This will display the remaining balance on the awarded contract.	Will only display when System Flag 1158 is set to <b>Y</b> .
View Warranty Coverage	Link opens the Warranty Unit Setup frame.	

### Job Tracking

Field	Description	Notes
Assigned	Select the checkbox if the vendor will be assigned to perform the work related to the job.	A vendor is unable to perform every single job on the work order.
Job Code	Job code pulled over from the work order.	
Status	The job status will pull over from the work order.	
Estimate	Estimated cost from the vendor.	Can be entered when in <i>BUILT</i> status.



Field	Description	Notes
Labor Amt	Actual labor costs.	Can be entered after the <b>Commit</b> checkbox is selected.
Part Amt	Actual part costs.	Can be entered after the <b>Commit</b> checkbox is selected.
Misc Amt	Actual cost for miscellaneous charges.	Can be entered after the <b>Commit</b> checkbox is selected.
Tax Amt	Tax charges.	Can be entered after the <b>Commit</b> checkbox is selected.
Total Amt	Total amount of all actual costs.	The system will calculate this value automatically.
Dealer Amt	Enter the dealer amount here.	Does not have an impact on total amount.
Warr Notes	As on <i>Work Order Main</i> , you can enter warranty notes here.	<p>You will have the option to Update Warranty Notes or Cancel the Warranty provided they have the necessary privilege (<b>WARR CANCELLATION</b>).</p> <p>System Flags 2066 and 2067 determine whether notes are mandatory.</p> <p>The icon will display in a yellow color if notes already exists, otherwise the icon will be greyed out.</p>

## 5. Test Suites

Test Suites provide a structured way to capture and react to test results. Tests are associated with standard jobs and work order jobs for capture of tests such as emission inspections, wheel truing, or mandatory safety checks.

Tests can be bundled into suites.

- For example, a tire tread inspection might consist of recording the tread depth on each of six tires, and these six tests make up one suite. The suite is then associated with as many tech specs as needed. If the test results indicate a failure, a work request is automatically created for corrective action.

It is now possible to have test suites where testing information is entered but does not lead to a pass/fail condition by setting the **Info Only** flag on *Test Suite Maintenance*. Examples of tests like this would be weather and temperature.

After the test suites are created, they then need to be associated with a standard job's tech spec. This could be a PM Job or any other standard job that the tests would be associated with. After that standard job is on a WO, then the tests will display on the WO.

Test Suites functionality also includes fault codes. These codes could be passed from an interface (such as a GPS system) to FleetFocus™ M5 indicating a potential problem on the vehicle such as the check engine light, excessive oil consumption and so forth.

The fault code would be defined on *Test Suite Maintenance* as the entry label then the entry description would be the description of the fault code. A default fault code can also be set. The fault code can be linked to a job corrective job code and reason so that a work request can be created when the fault code test entry is made.

If the test entered fails and a work request is generated, the test suite results and status will appear in the work request notes.

## Test Suite Maintenance

### Test Suite Maintenance

**Test Suite Information**

Test Suite Name:  Enabled:  Yes ▼

Next to Perform:

Linked Test Suite ID:

If any test item fails, Corrective Job data is as follows, unless overridden.

Code:

Reason:

Priority:

Allow user to override JobCode:  No ▼ SmartApps Checklist:  No ▼ Enforce Signature:  No ▼ Available on Direct Test Suite Entry:  Yes ▼ Show on Vehicle Safety Query:  No ▼ Add WR To Current Work Order:  No ▼ Send Fail Notification:  Yes ▼

**Test** Subsections User Instructions Categories

Column	Minimum Value	Maximum Value	In-Range Only	Allow NA	Value Req	Override Job	Corrective Job Code	Corrective Job Reason	Corrective Job Priority	Info Only	Spawn Job	Fault Code	Def Fault Code	Cannot Be Driven	Attach Req	Note Req	Fail Note Req	Disable
1	S	S	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	01-02	1		<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
2	S	S	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>				<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
A	B	B	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>				<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
INV_LOC			<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>				<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>

To view or modify an existing Test Suite, enter or select the **Test Suite Name**. You can modify the description, limited to 30 alphanumeric characters.

You can disable the suite or change any of the *Corrective Job Data*. To modify an entry sequence select the row.

To delete a sequence, select the row to delete and select **DELETE**. The row highlights red. Select **SAVE** to remove the record.

To delete the Test Suite, select **DELETE**. The *Action Required* window opens, select **Delete** to confirm the deletion.

To create a new Test Suite, enter a new **Test Suite Name**, up to 30 characters, letters and numbers. Press tab and enter a new description. Then select the job **Code**, **Reason** and **Priority**. Select *Yes* or *No* from the dropdown for the following indicators:

- Allow user to override JobCode
- SmartApps Checklist
- Enforce Signature
- Available on Direct Test Suite Entry
- Show on Vehicle Safety Query
- Add WR to Current Work Order
- Send Fail Notification

Select **SAVE**.

Within the *Tests* i-frame select the first empty row, enter the first test sequence **Entry Label**, **Entry Description**, and **Entry Datatype**. Then configure the remaining attributes for Job Code, Info Only, Spawn Job, and Fault Codes. Press tab and add another Entry Sequence if desired. Select **SAVE** when you are done.

### Send Fail Notification

The **Send Fail Notification** indicator controls when the **WR CREATED FROM TEST SUITE FAILURE** notification is sent from *Notification Manager*.

- Select *Yes* (default) from the dropdown to send a notification when the test suite fails and a work request is created.
- Select *No* from the dropdown to not send a notification.

### In Range Only

You can select the **In-Range Only** checkbox when the **Minimum Value** and **Maximum Value** is entered.

If you select **In-Range Only** for the *ENTRY OF DATE RANGE* data type and the minimum and maximum values are entered, you can enter a date that is **+** (plus) or **-** (minus) the number of days from the date the job was entered on the work order.

For example:

- Minimum Value is 7, Maximum Value is 21, date of job added to the work order is 03/14/2024 – you can enter any date from 03/21/2024 to 04/04/2024.
- Minimum Value is -21, Maximum Value is -7, date of job added to the work order is 03/14/2024 – you can enter any date from 02/22/2024 to 03/07/2024.

All entries are considered a Pass.

If you do not select **In-Range Only** and enter minimum and maximum values, you can enter any date value.

- Dates within the minimum and maximum range based on the date the job is added to the work order is a Pass.
- Dates outside the minimum and maximum range based on the date the job is added to the work order is a Fail and generates a work request, as set up. The date the job is added is the job's due date. On the *Direct Test Suite Result Entry* frame, the date is the Test Date.

For example:

- Minimum Value is 7, Maximum Value is 21, date of job added to the work order is 03/14/2024 – you can enter any date. Dates entered from 03/21/2024 to 04/04/2024 are a Pass. Any other date is a Fail.

- Minimum Value is -21, Maximum Value is -7, date of job added to the work order is 03/14/2024 – you can enter any date. Dates from 02/22/2024 to 03/07/2024 are a Pass. Any other date entered is a Fail.



**Note:** If you do not enter a minimum or maximum value, you are unable to select the **In-Range Only** checkbox. You can enter any date. All date entries are a Pass.

## Test Suite and Test Suite Failure Notes

Within the *Tests* i-frame, you can select the **Note Req** or **Fail Note Req** checkbox to require notes for test suites or test suite failures.

- If the **Note Req** or **Fail Note Req** checkbox is selected and notes are not entered, a message displays a list of the test suites missing notes. The test suite will not complete.
- If the **Note Req** or **Fail Note Req** checkbox is blank, the test suite completes with a **Status** of *Complete* and a **Result** of *Failed*.



**Note:** You can add or remove the selection from the **Note Req** or **Fail Note Req** checkbox to modify an existing test suite.

## Subsections tab

The **Subsections** tab allows you to categorize checklists by subsections so that similar test suites can be grouped together when the **SmartApp Checklist** flag is enabled.

Before subsections are available for use on this tab, you must first set them up on the *Subsection Codes* frame. Then you can add those codes to the **Subsection** tab and list them in the order in which they must appear in the application.

After you add all the necessary subsection codes on this tab, you must assign the codes to each entry on the **Test** tab.

## Categories tab

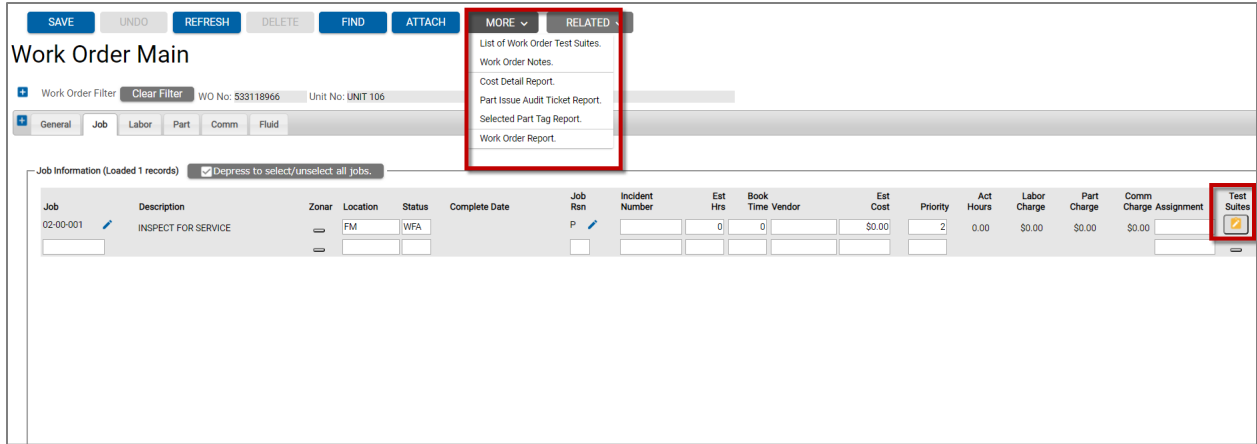
Users can limit checklists within the application by category codes on the **Categories** tab. System Flag 5365 controls this functionality. You will have to set the flag to **Y** to use this functionality.

After the flag is set to **Y**, users can assign categories to the test suite to have them appear in the SmartApp so that any unit assigned to a category will see the checklist and any unit not assigned will not have access.

## Work Order Test Suite Entry

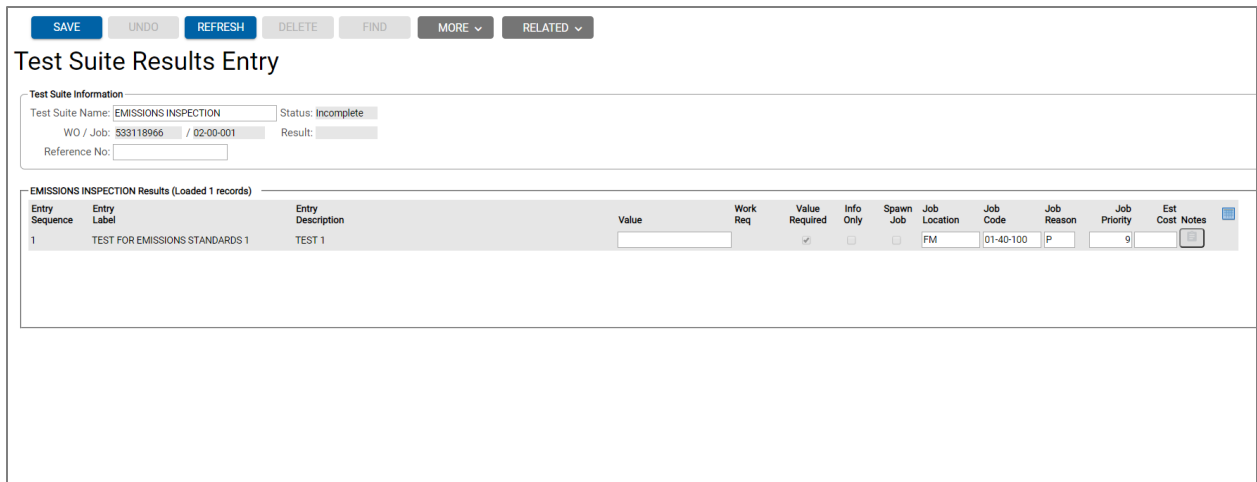


After the test suites are created, they then need to be associated with a standard job tech spec. This could be a PM standard job or any other standard job that the tests would be associated with. The tech spec must also be associated to the vehicles that need the information collected. After that standard job is on the work order, then the tests will display on the work order.



After the Standard Job has been added to a work order, you can enter test results on the work order. You can view a list of *Work Order Test Suites* by hovering over the **MORE** button at the top of the frame or you can select the **Test Suite** icon in the job row.

Double-click on the Test Suite to launch the *Test Suite Results Entry* frame.



After you have entered the test results, hover over the **MORE** button to select the *Complete Test Suite Results* option. The status will update to *Completed*. If the test failed, then the settings on the test suite will kick in and work requests will be created to perform the necessary work.

## Test Suite and Test Suite Failure Validation

Validation applies to the *Test Suite Results Entry* frame when test suites whose tests have:

- The **Note Req** checkbox selected on *Test Suite Maintenance* - Requires a note to be entered for the specific test in order for the entire test suite to complete.
- The **Fail Note Req** checkbox selected on *Test Suite Maintenance* and the result is a failure - Requires a note to be entered for the specific test in order for the enter test suite to complete.

If a test is set to require a note and a note has not been entered for the test and the user attempts to complete the test suite, a message displays indicating notes are required for a specific test line or lines. Users must select **OK** and populate notes for the appropriate tests to complete the test suite.

## Direct Test Suite Result Entry

SAVE UNDO REFRESH DELETE FIND MORE ▾

### Direct Test Suite Result Entry

Test Suite Result Entry (No Work Order)

Location: FM FM Parking Location Test Date: 12/24/2019 07:54:05 Status: Result:

Unit: [dropdown] [input]

Test Suite Name: [input] Meter Information [icon]

Reference No: [input] New Test Suite

User Instructions (Loaded 0 records)

Results (Loaded 0 records)

Entry Sequence	Entry Label	Entry Description	Subsection	Value	Notes	Work Req	Value Required	Info Only	Spawn Job	Job Location	Job Code	Job Reason	Job Priority	Job Cost	Est Attach

Test Suite results do not have to be entered on the work order. They can be entered directly on this frame if necessary when they are not linked to a work order.



Field	Description	Notes
Location	Select the location in which the tests are being performed. This will default to the sign in location.	
Test Date	Enter the date the tests were taken. The current date and time will default.	
Unit/Dept/Comp dropdown	Select if the tests performed were made on a unit/dept/comp.	Enter the unit number, department number or the component number based on the value entered previously.
Meter Information	Based on the MCC of the unit, enter any readings as needed.	
Test Suite Name	Enter or select from the LoV the name of the test suite that was performed.	The description of the test suite automatically populates.
Reference No	Enter a reference number, as applicable.	
<b>Results Section</b>		
Value	Enter the results in this field.	
Est Cost	Enter any estimated costs to perform the job is the test fails.	

### Test Suite and Test Suite Failure Validation

Validation applies to the *Direct Test Suite Result Entry* frame when test suites whose tests have:

- The **Note Req** checkbox selected on *Test Suite Maintenance* - Requires a note to be entered for the specific test in order for the entire test suite to complete.
- The **Fail Note Req** checkbox selected on *Test Suite Maintenance* and the result is a failure - Requires a note to be entered for the specific test in order for the enter test suite to complete.

If a test is set to require a note and a note has not been entered for the test and the user attempts to complete the test suite, a message displays indicating notes are required for a specific test line or lines. Users must select **OK** and populate notes for the appropriate tests to complete the test suite.

# Test Suite History Query

SAVE
UNDO
REFRESH
DELETE
FIND

### Test Suite History Query

**Selection Criteria**

Unit:

Test Suite Name:

Date Range: From:  To:

Tested Label:

Ref No:

Show failed entries only:

Completed Tests (Loading)										
Unit Number	Test Suite Name	Tested Date	Suite Status	Tested Label	Recorded Value	Notes	Subsection	Label Status	Work Order	
DUNIT	DH01	09/25/2019 11:51:30	FAIL	2	DFDGGDSF		TEST 2DESCRIPTK	REJECTED		
PMCC101	123456789012345	09/05/2019 18:29:00	FAIL	1234567890123456789012: 2				REJECTED		
DUNIT	DH01	09/25/2019 11:40:16	PASS	2			TEST 2DESCRIPTK			
DUNIT	DH01	09/25/2019 11:56:25	PASS	2	RTERT		TEST 2DESCRIPTK	ACCEPTED		
DUNIT	DH01	09/25/2019 11:53:31	FAIL	2	EREWTEWRT		TEST 2DESCRIPTK	REJECTED		
PMCC104	PMCC5	09/10/2019 08:00:59	FAIL	1	1			REJECTED		
12321	123456789012345	10/18/2019 13:48:41	FAIL	1234567890123456789012: 1				REJECTED		
20717	123456789012345	10/22/2019 20:16:20	FAIL	1234567890123456789012: 1				REJECTED		
PMCC101	123456789012345	09/09/2019 09:20:13	FAIL	1234567890123456789012: 2				REJECTED		
PMCC103	PMCC5	09/10/2019 07:58:45	FAIL	1	1			REJECTED		
DH1103	DH01	09/25/2019 11:44:20	FAIL	2	JHGJHGJHG		TEST 2DESCRIPTK	REJECTED		
DH1103	DH01	09/25/2019 11:52:12	FAIL	2	FGDSFGDSF		TEST 2DESCRIPTK	REJECTED		
GD1111	GTEST	10/24/2019 16:50:31	PASS	TEST1	N		TEST 1	ACCEPTED		
GD1111	GTEST	10/24/2019 18:34:45	FAIL	TEST1	Y		TEST 1	REJECTED		
DUNIT	DH01	09/25/2019 12:00:32	PASS	2	TEYRWETY		TEST 2DESCRIPTK	ACCEPTED		
DH1103	FMV-18038	10/25/2019 16:03:51	FAIL	MILEAGE 1	5001		EXTERIOR			
PMCC104	PMCC5	09/10/2019 08:00:59	FAIL	2	2			REJECTED		
PMCC103	PMCC5	09/10/2019 07:58:45	FAIL	2	2			REJECTED		
DH1103	FMV-18038	10/25/2019 16:08:56	FAIL	MILEAGE 1	77		EXTERIOR			
DH1103	FMV-18038	10/25/2019 16:06:56	PASS	MILEAGE 1	1		EXTERIOR			
PMCC02	PMCC3	09/09/2019 11:22:48	PASS	TEST3	Y			ACCEPTED		
PMCC102	PMCC3	09/09/2019 11:18:59	PASS	TEST3	Y			ACCEPTED		
PMCC101	PMCC3	09/09/2019 09:59:46	FAIL	TEST3						
PMCC104	PMCC5	09/10/2019 08:00:59	FAIL	3						
PMCC101	PMCC3	09/09/2019 09:46:38	FAIL	TEST3	Y			ACCEPTED		
PMCC1	TEST	09/12/2019 07:44:12	FAIL	5	Y			REJECTED		

The *Test Suite History Query* frame allows you to search for and view *Completed Tests* results data. You can filter on a variety of selection criteria to narrow your results.

## Selection Criteria

*Unit/Dept/Comp*, *Ref. No*, *Test Suite Name*, *Tested Label*, *Date Range*, and *Show failed entries only* dropdown.

You can filter on one value or a combination of values. After you have your filters in place, select the **Retrieve** button at the bottom of the *Selection Criteria* section.

## Completed Tests

The results will display on the *Completed Tests* i-frame. Each record that matches the selection criteria displays:

*Unit/Dept/Comp* number, *Test Suite Name*, *Tested Date*, *Suite Status*, *Tested Label*, *Recorded Value*, *Label Status*, *Work Order* number (hyperlink to *Work Order Main*), *Job Code*, *Work Request* number (hyperlink to *Work Request Main*), *Ref No*, *Meter Readings*, *Notes*, *Employee Number*, and *Employee Name*.

## 6. Accident Module

The *Accident Entry* frame allows you to view and create specific accident details for a single unit. Information such as driver name, insurance information, location of the accident, cause, police report details, weather conditions and more can all be tracked using the *Accident Entry* frame.

The *Accident Entry* frame is used to create the accident details for a single unit. The frame has sections pertaining to the following accident details:

- Unit, Driver, Insurance and Trip Information.
- Accident Location, Police, Victim/Witness Information, Weather Conditions, Driver Condition.
- Unit Damage – Ties into *Work Order Main*.
- Vendor Estimate.

The accident entry has many options for notes as follows:

- Accident notes – Accessible by using the **MORE** dropdown or icon at top of page.
- **Accident Description** hyperlink.
- **Damage Note** hyperlink.
- Convert the Accident into a Work Request

To create a new accident entry, select the **Add Accident** button in the *Accident Information* section to generate a NEW accident record. To view or modify an existing entry, type in the **Accident** number or select one from the Accident List of Values (LoV) by double-clicking in the Accident field or by selecting the **FIND** button at the top of the frame

If you want to delete an accident, type in the **Accident** number or select it from the list of values. The delete button will become active. Select the **DELETE** button, then **SAVE**.



An accident cannot be deleted if it is associated with any work requests or work orders.

## Unit Information

After you create a new accident entry and enter a unit number, the unit's VIN Number, Owning and Using departments, and license information will populate on the **Unit Information** tab.

If the unit has a valid, active operator assigned to it on *Unit Main* the **Operator, Name,** and **Operator Dept** fields will populate as well. If the unit does not have an operator assigned to it, you can enter one or one can be selected from the Active Operators list of values (LOV) by double-clicking in the **Operator** field or selecting the **FIND** button at the top of the frame.

After entering the unit information, **Driver** information can be entered. Aside from the **Country** and **State (ST)** fields, everything in this section is free form. The driver's license number, contact information and supervisor can be entered here.

Next, you can enter basic **Insurance** information. The **Company, Policy No,** and **Contact Phone** fields are all free form. The **Expire Date** defaults to the current date and time.

In the **Trip Question** section there are five questions related to possible driver infractions. Select any that apply to answer yes to that question.

The *Trip* section of the **Unit Information** tab allows you to track where and when the driver started their trip and where they were going when the accident occurred. The **Purpose** field is a free form note field that holds up to 255 characters, including spaces.

## Accident Detail

The **Accident Detail** tab allows you to enter some of the specific details about the accident. In the *Location* section you can enter the date and time of the accident, the address, city, state, zip and country.

This is also where you will enter the accident **Type** and accident **Cause** codes. A type of accident may be 'RE' for Rear-End Crash and an accident cause can be something like 'WEA' for Weather or 'FOG' for foggy conditions. These codes can be set up and defined on the *Accident Types* and *Accident Cause* frames.

You can select the **Accident Description** hyperlink to enter any additional notes about the accident. **Note:** You must save the accident entry so that an Accident Number is generated in M5 before you can enter and save notes.

Weather and road conditions can also be added to the accident detail in the *Condition* section. **Weather Condition**, **Road Condition**, and **Visibility** are all free form fields. Each has a limit of 100 characters.

There are three checkboxes that correspond to additional questions about the accident. **Seat Belt Used?**, **Personal Injury?**, or **Fatalities?** Select the checkbox to answer yes.

If the accident involves a Police Report, details of the report can be entered in the *Police Information* section. Select the **Police Report?** checkbox to indicate there is a police report for the accident.

The **Report No**, police **Department**, and **Officer Name** fields are all free form fields. You can also enter the **Address** of the police department that responded to the accident.

There are options to indicate if any kind of **Sobriety Test** was given to the driver. Enter the **Date Cleared** if the driver was cleared of any wrong doing.

Beneath the *Police Information* section you can enter basic witness information in the *Witness* section such as **Name**, **Address**, **Phone** number, and if they were a **Victim**, **Witness**, or **Passenger**. You can also enter more detailed information such as the vehicle they were in, their **Position In Vehicle**, any injuries that resulted from the accident, if they had to be transported anywhere (like the hospital), and date of death. There is also a free form note field at the end of each witness record.

## Unit Damage tab

Any insurance claim that results from an accident can be recorded and tracked here. After the **Claim No** has been entered, you can select a claim status from the **Status** dropdown (*Pending, Claimed, and Unclaimed*).

You can enter any estimated repair costs in the **Estimate Repair** field. You can select *Write Off* or *Buy Back* from the dropdown. If you select *Buy Back*, you can enter the amount in the **Buy Back Amount** field. This dropdown is for general reporting purposes only.

The **Subrogation Amount** refers to the amount that one entity (for example, your insurance company) pays out that is actually owed by another entity. Usually, this is the last part of the claims process and typically involves the two insurance companies involved in the claim.

If there is any amount that another part involved in the accident is responsible for, you can enter that amount in the Other Party Actual field.

**Total Accident Repair Cost** will update to reflect the total costs of the work order associated with the accident.

To add additional notes about the insurance claim or unit damage, select the **Damage Note** hyperlink. This is a free form field.



Like the **Accident Description** hyperlink, the accident entry must be saved so that an **Accident** number is generated before this note can be added to the record.

After the accident entry has been saved and an accident number has been generated, it can then be associated with a work order for the unit involved in the accident in one of three ways.

In the *Work Order* section you can double-click in the **Work Order** field to bring up the list of open work orders for the unit in question and select one or more work orders from the list to associate with the accident number.

Another option is to add the accident number directly to the job on *Work Order Main*.

The third way is to create a work request that is associated to the accident and then add it to an open work order.

## Vendor Estimate tab

The **Vendor Estimate** section allows you to track any estimates given by vendors for repairs related to the accident.

After selecting a valid, active vendor you can then enter a **Ref No** for the entry, an **Estimate Date** and then any **Labor Hours** or **Labor Cost**, along with **Part Cost**, **Comm Cost**, and any **Misc Cost** or **Tax** associated with the repair estimate.

You can also select the **Attach** icon to add or view any attachments associated with the Vendor Estimate.

You can select the **Award** checkbox to indicate the Vendor has been awarded the repair.

## Work Requests tab

On the **Work Requests** tab you can view work requests associated to the accident number or use the hyperlink to create a work request from the accident number.

To create a work request, select the **Make This Accident Into A a Work Request** hyperlink below the *Work Requests* i-frame. *Work Request Main* opens. You can then create a new work request for any jobs related to the accident. You can then add the work request to an open work order which will then be associated to the accident number.

## Insurance Claims tab

The **Insurance Claims** tab displays the insurance claim information related to the accident entry, if applicable.

## Payments tab

The **Payments** tab displays claim payment information related to the accident entry, if applicable.

## 7. Warranty Functionality

Units, their components, and their parts may have warranties from vendors and manufacturers. These warranties may overlap, and some portions of the unit might be excluded from the warranty.

Units with the same technical specification will normally have the same warranty terms, and parts purchased from a given vendor will often carry the same terms. Those terms can be usage-based or time-based.

M5 provides for the setup of warranties on multiple levels: *whole-unit warranties* extending from the acquisition of the unit or when it was placed into service, *sub-unit warranties* based on VMRS assembly codes that start at the same time or later (as with an after-market alteration), and *part warranties* that start when a part is installed. You can set default terms at the technical specification level to be carried down during unit creation.

After set up, M5 flags violations of whole-unit and sub-unit warranties at the time jobs are added to work orders and violations of part warranties when the same or functionally similar part is issued. Some transactions can be excluded from warranty violations based on job characteristics or predefined whole-unit or sub-unit exclusions.

This document describes the setup of the three different types of warranties and how M5 flags violations as well as the warranty claim process.

### Definitions

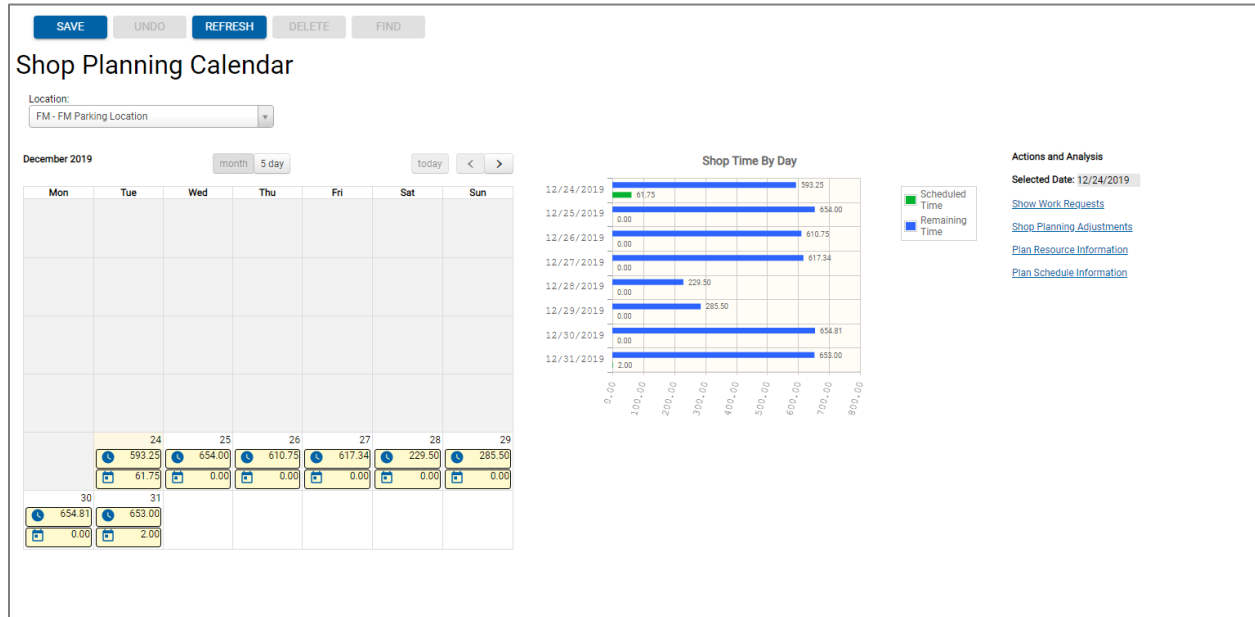
- A *Whole-Unit Warranty* applies to the unit and everything on the unit. It starts when the unit is acquired or when it is put into service depending on a system flag. By definition, a unit can have only one whole-unit warranty.
- A *Sub-Unit Warranty* applies to a portion of the unit based on its VMRS (ATA) system or system-assembly coding. For example, a warranty for system 17 can be defined for the tire warranty, and further refined to 17-008 for the valve assembly. The terms of a system-assembly warranty are checked before the system terms, and the system terms are checked before the whole-unit warranty terms.
- A *Part Warranty* applies to a single part issued to a unit work order. The terms of a part warranty begin when the part is issued to a unit.



- Warranty Terms are defined in terms of usage (miles, kilometers, hours from a meter, or count of actions) or time (days or months). A warranty can have either usage or time terms, or both, but it must have one or the other. The time unit-of-measure, that is, days or months is set on the *Time Interval* frame. Different warranty frames can have different units-of-measure. Terms are always *whichever comes first* if a warranty has both usage and time terms, the event must fall within both of those limits. When checking against time warranty terms, the current date and time of the event is used.
- A Warranty Violation occurs when no exclusion applies and when:
  - On a whole-unit warranty, a job is added to a work order within the warranty terms.
  - On a sub-unit system-assembly warranty, a job is added to a work order within the warranty terms whose system-assembly matches.
  - On a sub-unit system warranty, a job is added to a work order within the warranty terms whose system matches (regardless of the job code's assembly).
  - On a part warranty, the same part is issued within the warranty terms. If System Flag 1317 is "Y", then a part warranty is also violated if an issued part's VMRS system-assembly-part coding matches the warranted part's system-assembly-part coding.
  - Regardless of any defined warranties, a job is created on a work order and the job's reason is flagged as "warranty".
- A Warranty Exclusion prevents M5 from flagging a warranty as violated:
  - The job's reason is flagged as exclude from warranty.
  - The job code's work accomplished code is flagged as ignore warranty violations.
  - A sub-unit warranty row exists flagging the job code's system or system-assembly as excluded.
- ❗ Please see the *Warranty Management User Guide* for a more in depth review of this functionality and the setup involved.

## 8. Shop Planning

The *Shop Planning Calendar* frame is a tool for users to monitor and manage the planning of upcoming work requests into workshops.



❗ Please see the *Shop Planning Guide* for a more in depth review of the functionality and setup involved.

It should be noted that although the Planning Calendar does present information starting from today, in real time, it is designed as a tool to manage planned work in the future. Therefore users are advised against using it for managing work on the present day.

After the current day or shift has commenced, the situation has moved on from planning and onto on-the-day workshop operation. Whilst the data presented is correct as to what is entered on M5, it can be difficult to accurately gauge just what's exactly happening in the Workshop.

The Planning Calendar effectively shows planned work against employee resource time. The planned Work Request time is calculated from the Shop Time of Work Requests grouped by WR Due Date initially and Schedule Shift for each Maintenance Location.

The resource time is calculated from:

- The net hours on an Employee Shift;
- Multiplied by the number of Employees assigned to that shift;
- Multiplied by the percentage modifier set on the Shift Type or Employee Title (depending on flag setting 5441);

- Minus any Planned Absences.

You can use this information to organize the staff and jobs scheduled in the workshop on a daily basis to maximize efficiency and productivity of each workshop.

## 9. Booking Appointments

The purpose of M5 Bookings is to provide a facility for work to be booked into a workshop on a particular day, with complex booking instructions; restrictions and pricing rules applied depending on who the **Customer** is, what the vehicle is and a wide array of other factors.

The screenshot displays the 'Booking Appointments' interface. At the top, there is a navigation bar with buttons for 'SAVE', 'UNDO', 'REFRESH', 'DELETE', 'FIND', 'MORE', and 'RELATED'. Below this, the main title 'Booking Appointments' is centered. The interface is divided into several sections:

- Booking:** Contains fields for 'Unit', 'Customer', 'Booking Number', 'Booking Status' (with a dropdown menu set to 'Inquiry'), 'Alt Unit No.', and 'Location'. A 'New Booking' button is located below the 'Booking Number' field.
- Booking Dates:** Contains fields for 'Created Date/Time', 'Last Change', and 'Last Booking Status Change'.
- Booking Details:** Contains fields for 'Equipment Profile', 'Booking Source', 'Booking Type', 'Caller Name', 'Caller Email', 'Booking Reference', 'Cancelled Reason', 'Declined Reason', 'Caller Phone Number', and 'Genuine Parts' (with a checkbox).
- Meter:** A small icon with a smiley face.
- SLA:** A large, empty rectangular area.
- Job Information:** A footer bar indicating 'Job Information (Loaded 0 records)'.

❗ Please see the Booking Appointments Guide for a more in depth review of this functionality and the setup involved.

It is essentially a platform enabling staff in a central location to view the workload of a location and schedule additional work without needing to directly communicate with the workshop.

As the users have access to what capacity a workshop has they can operate autonomously to schedule work for the internal fleet or customers alike, maximizing the output of a workshop and reducing the amount of local administration required.

Bookings can be created, which will generate Work Requests on a particular day. The Booking will show the user if there is enough resources at a location to take the work and will also display cost estimates and actuals both before and during the work is being carried out, which can be communicated to the customer.

## 10. Queries

M5 offers in-application reporting options in the form of Query frames. Here is a list of some of the important query frames within the workflow module:

- Work Request Incident Query
- Work Request Query
- Work Order Display/Query
- Work Order Commercial Charge Query
- Work Order Labor Charge Query
- Part Inquiry By Unit
- Work Order Management
- Employee Assignments
- Standard Jobs Query
- MCC Query
- Preferred Vendor
- Work Order Preferred Vendor Search
- Booking Appointment Query
- Booking Work Request Query
- Shop Planning Schedule

## 11. System Flags

Please see the *System Flags Table* guide for a complete listing of all the flags for the Workflow/Shop Management module.

## 12. Updates

Release	Section	Description
23.1	<a href="#">11. System Flags</a>	Added new System Flags 5520 and 5522.
23.2	All sections	Applied miscellaneous writing style updates throughout the document.
24.0	<a href="#">11. System Flags</a>	Updated the reference to the System Flags Table guide. Removed the System Flags table.
24.2	<a href="#">Test Suite Maintenance</a>	Added <a href="#">In-Range Only</a> .
24.3	<a href="#">Test Suite Maintenance</a>	Added <a href="#">Send Fail Notification</a> .
24.3	<a href="#">Test Suite Maintenance</a>	Added <a href="#">Test Suite and Test Suite Failure Notes</a> .
24.3	<a href="#">Work Order Test Suite Entry</a>	Added <a href="#">Test Suite and Test Suite Failure Validation</a> .
24.3	<a href="#">Direct Test Suite Result Entry</a>	Added <a href="#">Test Suite and Test Suite Failure Validation</a> .