AssetWORKS

Jump Start Guide

M5 System Management Overview

Version 24.x
Last Modified 24.0 | March 2024

Technical Support

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

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

Telephone:	1-610-225-8300
Email:	M5Support@AssetWorks.com
Website:	https://community.assetworks.com/hc/en-us

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

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System Management Overview

Managing your M5 system is a very important job that takes time and careful consideration. Your organization may have several people who are responsible for setting up and maintaining codes, flags and other core system information. In many cases the people who are responsible for planning how your organization uses the M5 System are not the people who will actually use the system on a daily basis. It is important that there be a collaborative effort between all the groups involved to ensure a successful implementation. Regardless of who is responsible for managing your system, there are three basic steps for a successful implementation:

- Carefully Plan how you are going to use the M5 System.
- Build your database by loading existing tables and entering data manually.
- Verify your data thoroughly.

Administrative controls and management reporting capabilities will be determined by the amount of planning and communication put into developing your coding structures, business processes and reporting requirements. This manual is intended to lead you through the planning process and provide guidance for the decisions and development required for you to effectively implement your new M5 System.

Planning Your M5 System

Prior to implementing your M5 System careful planning is required. Communicating with all parties involved to identify their business needs will be essential to your planning. A key part of the planning process is reviewing the structures of your data tables, the actual data that you plan to convert from other systems and the design of any new data tables you want to add.

The importance of your planning process cannot be overstated. M5 is a powerful and flexible system. AssetWorks staff is prepared to work closely with the members of your organization to ensure a successful implementation. We have developed proven strategies and activities that will help us reach that goal.

Implementation Strategies

Implementing a Fleet Management system is a complex process. Before you begin investigating and planning how you want to use your new M5 System you should first do a careful examination of all your current business procedures. You will likely discover that many of them are performed without a full understanding of how they relate to other procedures. You will also find procedures that you would like to be able to perform differently or that you don't perform at all but would like to. This is your opportunity to explore all the possibilities and find room for growth and improvement.

Define Current Business Procedures

The first step is to analyze and document your current business procedures. If you already have detailed documentation, this is a good opportunity to review it and update where necessary. Implementing any new system will impact the way you do business. The better you can define the details of your business processes, the easier it will be to identify changes and anticipate their impact. The information obtained during this process will be used to develop your M5 System business practices.

Suggested Activities:

- Organize an implementation committee dedicated to the success of this project from beginning to end. This committee is frequently referred to as your Key User Group and they will be responsible for the timely implementation of your system. The Key User Group should consist of members representing all areas of your organization. It should include managers responsible for your IT Support who manage your servers, databases, networks, software, or disaster recovery. It should also include Fleet Management, Shop Floor Management, Inventory Management plus Asset and Financial Management who oversee areas such as Billing, Accounts Payable and Warranty control. Build a team that efficiently covers the entire spectrum of your business. The complexity of your organization will determine the number of members but normally we see a minimum of five managers on this committee.

- Interview key department personnel inside the fleet organization and in the other areas of your business. Talk with anyone who receives or relies on reports or data from the fleet system. They may need to access the system directly as a user or through connectivity with another system or just indirectly through reports. Document their requirements in detail and build a wish list of what they'd like to have. Compare these lists from everyone interviewed and see if there are common needs or enhancements that can be added during the initial implementation of your M5 System.
- Visit facilities to observe the operations. Check your most current functional work flow documents against the reality of actual operations. You may discover that functionality has changed in unexpected ways. This evaluation should identify who is actually doing what task and which tasks might need to be reassigned, changed, or eliminated with the new M5 System.
- After your interviews and facility visits, update your current work flow documentation for each area. Confirm which ones are correct, which ones need changing and new ones that need to be created.
- Based on your document review, interviews and facility visits identify any business processes that you anticipate being affected by the M5 System implementation. Also make a separate list of processes that will not be affected by the M5 System.

Develop Future Business Procedures

A review of your present business practices will assist you in determining how your business will look in the future. It will help you in determining how the practices will be handled using the M5 System application and what the critical issues of the implementation process will be.

Suggested Activities:

- Examine current practices and consider practices for the future.
- Compare present procedures to future procedures.
- Develop changes to your organization's procedural manual and forms.

Organize a training team to conduct end-user training and future train-the-trainers sessions. This team may consist of your key users, support personnel or other individuals chosen for their understanding of your Fleet's business practice. It will be important that they are willing to embrace the move to the new M5 System and have a good rapport with the staff they will be training and assisting.

Questions to Ask Yourself about M5 System Data Setup

The M5 System frequently moves information from one area of the system to another to complete a process. Items such as user-defined codes and system flags enable you to control this functionality. You will discover that M5 is extremely flexible in allowing the user to define these types of codes, set the system flags, edit the names of frames and fields, and create lists for notification alerts, report recipients and more. So keep this in mind as you review the items below.

Here is a list of issues to consider as you're planning how your organization will use your new M5 System. As you consider these issues you should carefully document the decisions and conclusions you reach.

Customize Menus - How can you customize menus to speed up operations and to control user access? You can review any current system usage and document all functions that are used by individual user. You will use this documentation to compare the available frames in the M5 System to what your user community currently uses. As you compare frames between the two systems make sure that you don't omit any current functionality in the building of new menus in M5.

User Access - Which users will be assigned to which functions in the system? To assist with functionality assignment you will want to document not only what programs and reports each user currently can access but also the levels of authority you want to grant each user in the M5 System. The authority levels will determine the field security setup in the M5 System. Also review physical location access and determine how locations should be grouped in the setup of the M5 System. Review the printer setup in your current system so that similar printer groups can be created and assigned to users in the M5 System. The M5 System has two different user name components; an application user and a database user. The application user is assigned a database username through the Roles they are assigned. Depending on whether you are using Oracle or SQLServer the system administrator will provide this level of access.

Repair Code Structure - Will you use the ATA structure modified for your particular mix of equipment, systems, components, and parts or will you create your own repair code structure? M5 allows you to implement a new 3-character system code schema if desired. You need to review that issue and make a decision early in the implementation process. If you should decide to move to the 3-character schema, you also need to decide whether or not you will be converting your old data to the new system. If so then the historical data will need to be modified to include the new 3-character code. This is done by developing a translation table to perform the conversion but this is not part of the standard M5 System implementation package.

Standard Jobs - How will you define your standard job information for recurring or preventive maintenance (PM) work? If you currently do not use standard jobs for managing your PM program, this is an opportunity to do so. M5 incorporates a lot of functionality oriented towards efficient Preventive Maintenance. You may want to review your PM program now and take full advantage of M5's features. For instance you could add fuel as a criteria or remove usage.

Technical Specifications - Technical Specifications (tech spec) is a critical component used in identifying the units of your fleet. It is a code that defines the unit by Year, Manufacturer, Make and Model. Study it carefully and confirm that you understand its usage. After it is assigned you can group the units together by this code for analysis and management. In addition, the M5 System also employs a Category Code to further classify the tech specs and an asset class code that classifies categories into larger groups for aggregate reporting and management. To summarize, individual units are assigned Tech Specs Codes. Tech Specs can be grouped into Categories and Categories can be group into Asset Classes. M5 Version 15 includes a new high level of pre-classification called Unit Asset Type that allows other capital equipment such as accessories, trailers and tools to be assigned a Type code. Although it is required to be associated directly to a fleet unit it does allow for reporting by the Type designation, similar to

Asset Class and Category. You can perform management analysis on each level of these code classifications. Review the functions of the Asset Type, Category and Asset Class further to determine how it might be used by your organization.

Maintenance Class Codes - Another critical unit identification code is the Maintenance Class Code (MCC). M5 allows you to group your units by the meter type, the PM Schedule and the monthly usage. Now is a good time to review your current groupings of maintenance classes. MCCs are useful for tracking vehicle performance and maintenance costs for a particular class of units. Since maintenance is such a critical component make sure that your MCC groups will provide your management with the reports they need.

Visit Reason Codes - Every unit requiring maintenance in the shop requires a work order. Why are you opening this work order? Basically there are only two reasons a vehicle comes into a shop. It is there for a planned visit such as PM or it is there due to a breakdown that needs repair. Sometimes it is smart to perform minor repairs at the same time you are doing a PM, so your organization might want to show multiple visit reasons. But this Visit Reason Code should be thought of as the primary reason for the visit and work order. If the minor repair didn't warrant removing the unit from service and was only done since the unit was coming in for a PM, the visit reason shouldn't be coded as a repair. The details are better coded on each job or task.

Job Reason Codes - Each task on the work order is identified with a Job Reason code. So why is a particular task being added to a work order? Is it part of the planned maintenance? Was is a driver reported issue? Was it a planned upgrade to the unit? You can have as many reasons for adding a job as you wish to have. But as you consider this list of reasons, think about the reporting you need to see. Which of these reasons do you see frequently? Which ones are more important and which ones could be grouped together on a report?

Work Accomplished Codes - The Work Accomplished Codes (WAC) are used to define the type of work that will be done on units; what type of labor will be required. WAC codes are generally verbs describing actions such as repair, replace, tow, wash, inspect, or troubleshoot.

Part Failure Codes - The Part Failure (PF) codes are used describe the failure observed on the part when it's brought in for repair. If you are not already doing so, you may want to consider beginning to track why parts are failing in an effort to reduce the cost of operations. If so, what codes will you need to use to do so? Again, think about the reports you need, what can you use to prove to your parts provider or manufacturer that there is a problem with a product?

Job Status Codes - The Job Status codes are designed to help you capture the type of information you need to analyze the downtime on your units. The total amount of time the unit is the shop for a PM or repair will consist of actual time for labor and troubleshooting or it may be the time spent waiting on a part or tool to be delivered or a repair to be approved. Other job status codes may indicate that a unit has been sent for outside repair or that a job has been completed. These codes are very useful to the Shop Manager for controlling workflow through the shop.

Disposal Reasons - Eventually you will need to remove a unit from the fleet. The Disposal Reason codes are used to indicate why. Is it the normal end of life for the unit, is it damaged beyond repair, is it surplus equipment? Consider the full range of fiscal implications when creating and using these codes. This is capital equipment and the transactions are audited and must be justifiable.

Modifying Closed Work Orders - Why do you need to make an adjustment to a closed work order? It might even be from a prior billing period. M5 allows you to reopen a closed work order and enter a vendor correction, warranty adjustment to previous charges, core credit, or error found in accounting. Consider all the history you have on the need to do this and make a full list to create in M5.

Labor Tracking - How do you want to track and report labor charges? Employee time can be tracked on multiple levels from the in/out postings on work order jobs, by location, department or union. Review your current labor management reports and consider any changes that might be helpful and requirements that are essential to maintain.

Indirect Account Codes - Indirect accounts are used for collecting labor, parts and benefit transactions that can't be charged directly to work orders. These indirect charges can be used for inventory write-offs or adjustments, costs for maintaining your locations, equipment repair, cleaning or vendor services, fuel adjustments for tank inventory, shop supplies and more. If you aren't doing this currently this is the time to understand how you can collect the full cost of running your locations and use those total costs to accurately price your labor rates and the overhead percent to charge for fuel, inventory and commercial repairs.

Fiscal Calendar - This is an excellent time to review the dates that the system will use for you to run your end of period processes and close your billing cycles. Check your current fiscal calendar's start and end dates for each month. When you set up your system calendar check your end of period process dates and close billing period dates. If the dates are not close to your actual fiscal month end, your data may not be comparable between various months. This is the time to plan how you are going to handle closing your months and billing cycles and what data you want to reflect in each month. Also consider any conversion processes that may be run during implementation and the impacts they may have on any accounting period reports.

User Defined Items - Your new M5 System has a large number of items that you will create based on your current definitions for employees, locations, departments, units, vendors, parts and technical specifications. If there are additional data items that your users and managers would like to see on reports you can create the field in the database so it can be used and reported on.

Inflation Rates - Inflation rates can be built into your system calendar periods in the M5 system. Are you currently using an inflation rate in your accounting forecasting? You might want to consider using this capability if it applies to your business model.

Markup Percentages - What markup percentage is currently applied for parts, labor and commercial at each location? Do these markups occur at the system, location, resource or part number level? A solid financial review should be made as you implement M5 and periodically thereafter to ensure that you are truly covering the costs of maintaining your equipment.

System Flags - There are hundreds of System Flag switches in your M5 System. They are delivered with default settings but you will have to decide how many of them need to be changed in order to configure your system. They are discussed throughout this manual and in the System Administrator Manual. You should review the purpose of each flag setting and document the reason you are setting them on or off (Y/N). During the implementation you may decide to change a flag setting or later on you may decide to use a module differently and need to make a flag change. Be sure to keep a current list of all your flag settings and document the reason and impact of changing them.

Shift Codes - How will you define your work shifts for locations, units and employees? Shift Codes affect the recording of unit operational and maintenance downtime and reflect the true work hours of your employees. After you decide the shift codes you will be using on your time records, make sure that all employee records are accurate.
It is common for Shift Codes to be overlooked when employees change work shifts. Develop a procedure to maintain accurate shift information for all units, locations and employees.

Organizational Hierarchy - Is your current organizational chart accurate? Review the chart now and make sure you know where each of your departments belong within your organization. When you create your departments in the M5 System you have up to ten organizational levels available. Consistent, accurate descriptions are required for the integrity of your data.

Contracts - How do you currently use contracts for parts inventory, fuel purchases and commercial repairs? Your M5 System can be used to monitor blanket contracts or contracts driven by amounts and balances or start and end dates. Analyze your contracts and explore the possibilities for maximizing your savings and control with your M5 System.

Workflow Process - We have already mentioned the need to document your current workflow process during your interview and location visits. Now examine them closely and consider the possibility of adding new functionality such as campaign/recalls, work requests, deferred work, and warranty notification. As you become more familiar with the functionality of your M5 System you will be able to consider changes and improvements based on what the system can do and readily identify where in your workflow those improvements can best be implemented.

Bar Codes – Are you currently using bar codes and scanner technology in your business? Identify each area where they are being used and the functionality they provide. Bar codes can be used throughout the M5 system to enter data, time stamp labor transactions, record part numbers for receiving, issuing, and inventory and process work remotely with hand held equipment. If you do not use bar codes yet, now is a good time to consider implementing their use as you move to your M5 System.

As you can see the list of items you will be addressing during the implementation is extensive. After you get started you will most likely find other items to be concerned with as well. Use your Key User group meetings to discuss all the items that occur to you. Document your discussions and ideas carefully. Ideas that may seem small or unimportant to you may trigger an important detail for one of your other Key Users. This is your opportunity to explore and investigate all the possibilities. The more thorough you can be, the better your implementation will become.

Configuring the M5 Application

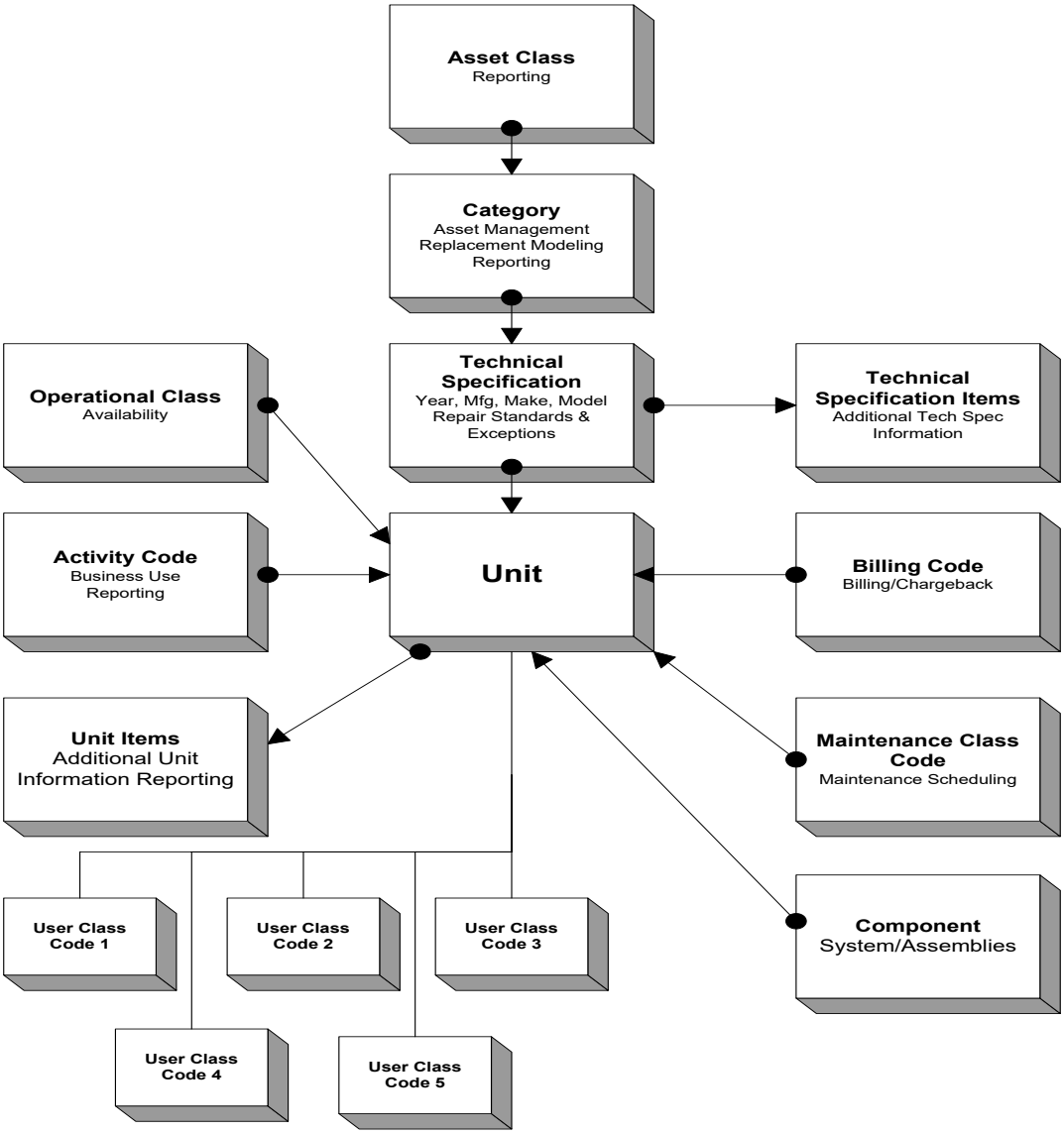
M5 functionality is structured into modules. Code configuration will depend on the functionality implemented by the specific client. Some codes are used in more than one module. This manual will present the code configuration for each module. If a code is used elsewhere in the system, that module will be noted as well.

The modules that this document will cover are:

- Asset Management
- Inventory Management
- Work Order Management
- Employee Management
- General Use Codes
- System Administration and Security
- Fuel Management
- Shop Planning
- Billing Management
- Motor Pool Management

Asset Management

M5 Asset Classifications



M5 Asset Classification Terminology

The table below lists many of the terms used to describe asset classification and grouping within the M5 System.

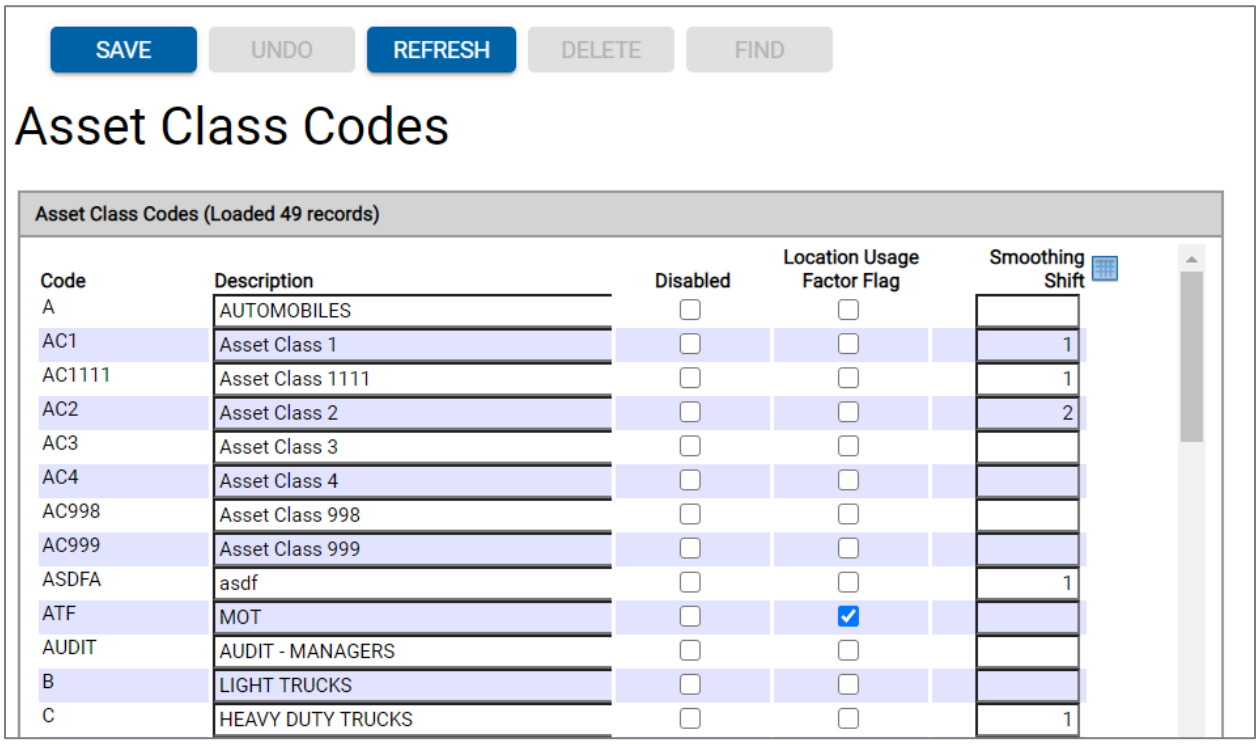
Asset Class	This is the highest level of grouping of equipment into broad groups of equipment such as ‘trucks’ or ‘heavy equipment’ and should be groupings that you want to do reporting by.
Category	Second highest level of grouping of equipment. Controls unit budgeting, valuation, procurement (purchasing) and replacement policies.
Technical Specification	Grouping of equipment by physical characteristics of units or components of same year, manufacturer, make, model, engine, transmission.
Technical Specification Items	Additional information regarding the physical characteristics of a group of units/components in a single technical specification grouping. There may be as many of these user defined fields as are desired. These fields allow you to inquire (look up) by the data entered into them. The data must be the same for all units in the technical specification grouping. For example, all the units have engines manufactured by Cummins.
Activity Code	Code used to group units by their business use such as ‘firefighting equipment’.
Maintenance Class Code	Defines a group of units that are alike in their maintenance scheduling requirements, have the same meter type(s), the same seasonality and same expected monthly usage although they may have different physical characteristics.

User Classes 1-5	Five user defined codes to further group equipment for reporting purposes. All equipment that is funded by external funds could be grouped under a class and that class could be divided into the different types of funding: State, Federal, Grant, Private Loan.
Billing Code	A grouping of units defining the rules for billing motor pool, lease and non-lease rates back to the user or owner of equipment. The billing code is assigned to units. All units having the same rules of billing have the same billing code assigned to them.
Operational Class	Used to indicate a grouping of units by how they are utilized. Operational class is used within the unit availability module to assure that enough of a given type of vehicle is available for the end user at a given time of day. For example, Handicap vans.
Unit	Individual, uniquely numbered vehicle such as a bus, sedan, bucket track, tractor trailer.
Unit Items	An unlimited number of user defined fields which can be attached to equipment records for inquiry and reporting. An example might be the unique serial number of the installed engine or the key code for the keys of the piece of equipment. These fields are used to define the specific items which distinguish one unit from another that is the same year, make, model.
Component	Individual, uniquely numbered system/assembly such as an, transmission, fuel pump, etc. Components are normally associated with a specific unit. Components may be rebuilt and shelved as an inventory part might be.

Asset Classification Codes

Asset Class Codes

Module(s): Asset Management



Code	Description	Disabled	Location Usage Factor Flag	Smoothing Shift
A	AUTOMOBILES	☐	☐	
AC1	Asset Class 1	☐	☐	1
AC1111	Asset Class 1111	☐	☐	1
AC2	Asset Class 2	☐	☐	2
AC3	Asset Class 3	☐	☐	
AC4	Asset Class 4	☐	☐	
AC998	Asset Class 998	☐	☐	
AC999	Asset Class 999	☐	☐	
ASDFA	asdf	☐	☐	1
ATF	MOT	☐	☑	
AUDIT	AUDIT - MANAGERS	☐	☐	
B	LIGHT TRUCKS	☐	☐	
C	HEAVY DUTY TRUCKS	☐	☐	1

The Asset Class Codes frame allows you to create and maintain codes to assign to units with similar characteristics to create classes of units.

M5 supports a classification hierarchy for grouping units by type and function. The Asset Class Codes created and maintained here are the highest grouping in the hierarchy and a key part of this structure.

These codes are assigned to Category Codes on the Category Main frame. This allows for reporting and cost tracking of each category.

To create a new Asset Class Code, type the new code in the Code field in the first blank row at the bottom of the i-frame. This field has a limit of 10 characters. Next, enter a description to further define the Asset Class Code. This is a free form field with a limit of 30 characters.

The Location Usage Factor Flag is used in Replacement Modeling. On the Location Main frame, you can set a Replacement LTD Usage Factor. If you want this factor to be used in Replacement Modeling for the new Asset Class Code, select this checkbox.

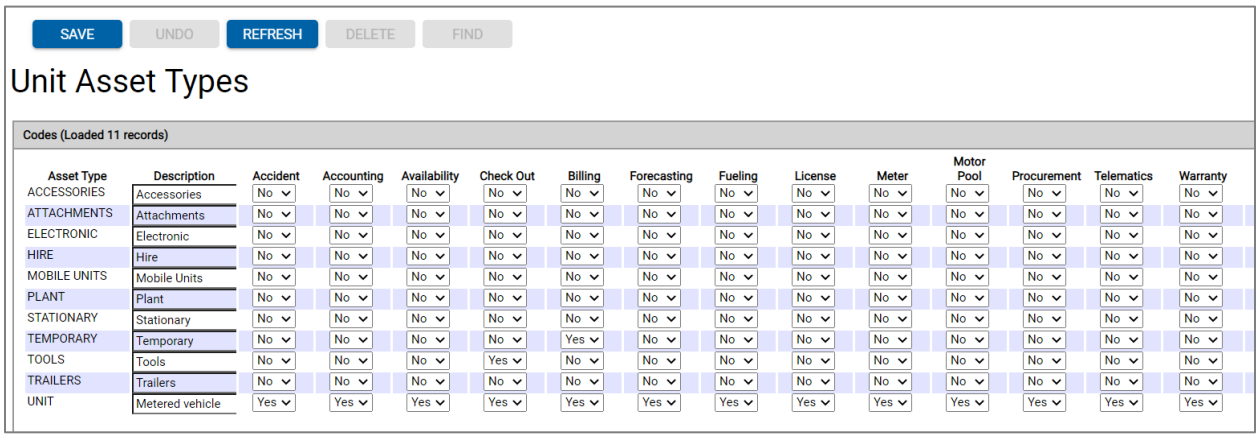
If not, leave the checkbox cleared. Then select the SAVE button at the top of the frame to finish creating the new Asset Class Code.

Smoothing Shift must be a valid shift value from shift maintenance and is for use with the Work Request Smoothing Batch Process/Module.

You can modify existing codes after they are created or delete codes provided they are not in use anywhere else in the system. You also have the option to disable a code by selecting the Disable checkbox.

Asset Types

Module(s): Asset Management



The Unit Asset Types frame allows you to define asset type capabilities and functionality. The Unit Asset Types are predefined by AssetWorks and hard coded, however you can modify the description of the asset types.

You cannot delete an asset type; you can only disable them. To disable an asset type, select the Disable checkbox at the end of the row for type you want to disable. Select the SAVE button at the top of the frame to disable the asset type.

Note: After a type is disabled, you cannot modify the description or any of the capabilities for that asset type. Fields will display as read-only after you disable an asset type.

Asset Type Capabilities

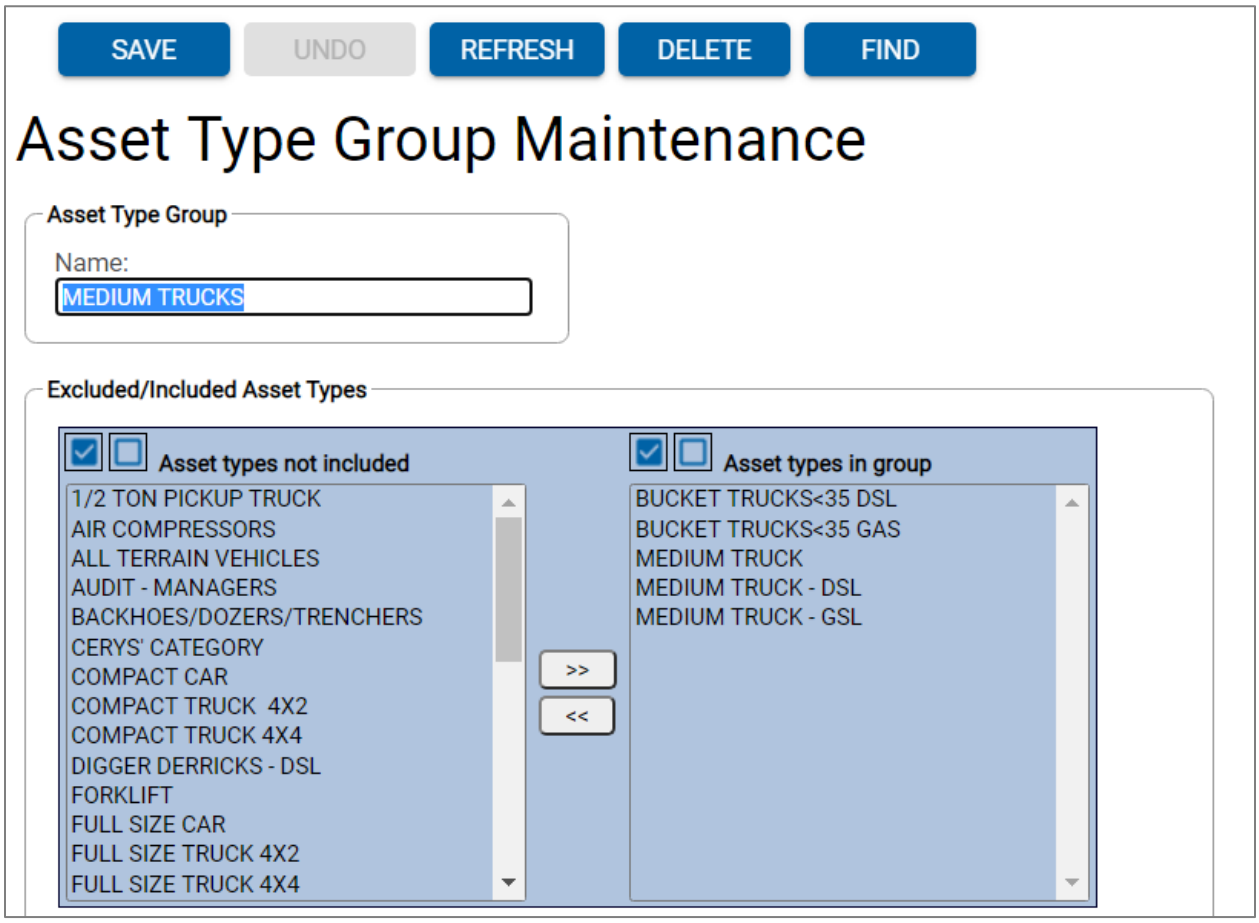
The asset type capabilities are user-defined. Select 'Yes' or 'No' from the dropdown to turn on/off certain functionality for a particular asset type.

If an asset type does has a specific capability set to 'No', you will receive an error message stating that the asset type does not support that capability when trying to use the corresponding functionality/ frames.

For example, if Work Order is set to No and you try to enter a unit number with an asset type that has the Work Order capability set to 'No', you will receive the error.

- **Accident** - Determines if the asset type will support Accident Module functionality on the Accident Entry frame.
- **Accounting** - Determines if the asset type will support Unit Accounting functionality.
- **Availability** - Determines if the asset type will support functionality within the Unit Availability module.
- **Check Out** - Determines if the asset type will support Equipment Focus functionality on the Equipment Check Out frame.
- **Billing** - Determines if the asset type will support Billing functionality.
- **Forecaster** - Determines if the asset type will support the Batch Process - Forecaster functionality.
- **Fueling** - Determines if the asset type will support Fuel functionality such as Product Issues.
- **License** - Determines if the asset type will support License functionality on Unit Main and/or the License/Permit Admin frame.
- **Meter** - Determines if the asset type will have meters and support Meter Entry functionality.
- **Motor Pool** - Determines if the asset type will support Motor Pool functionality.
- **Procurement** - Determines if the asset type will support Procurement functionality.
- **Telematics** - Determines if the asset type will support Telematics functionality.
- **Warranty** - Determines if the asset type will support Warranty functionality on the Warranty Unit Setup frame.
- **Work Order** - Determines if the asset type will support Work Order functionality.

Asset Type Group Maintenance

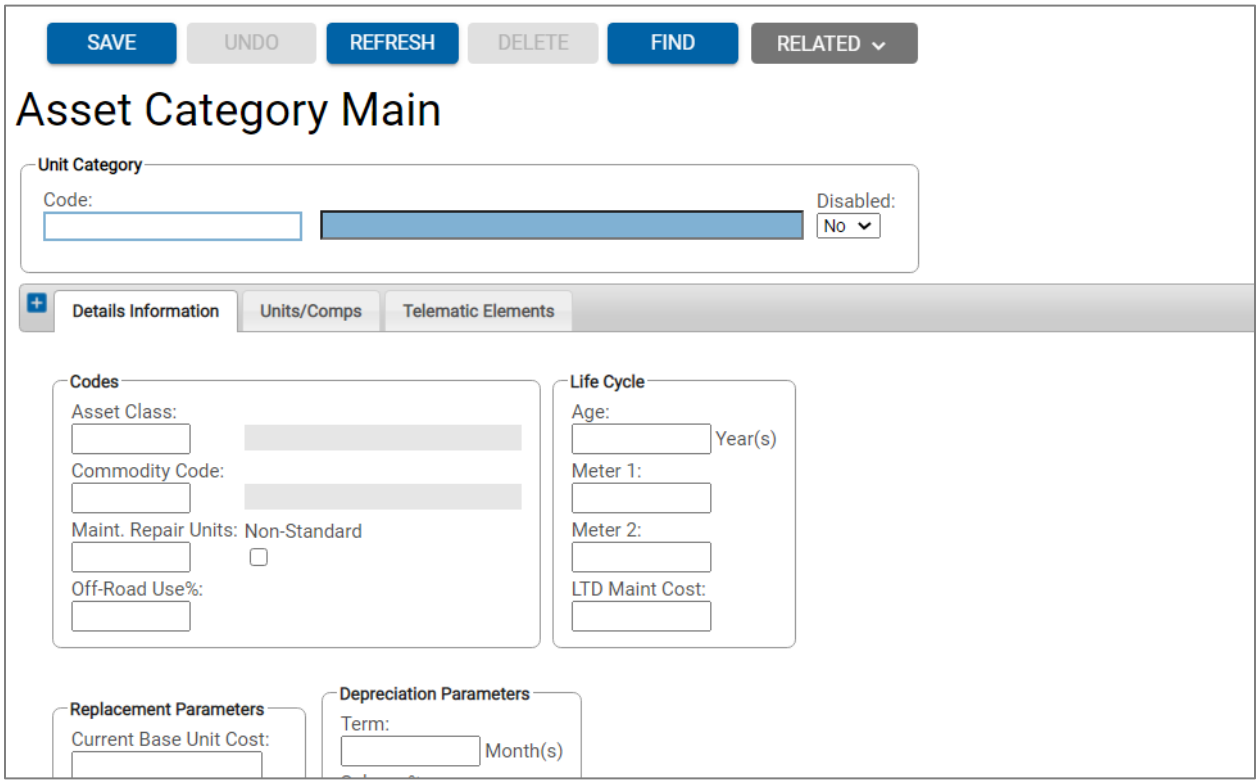


Module(s): Asset Management, PMM

The Asset Type Group Maintenance frame allows the user to group similar asset types used in the Performance Measures Monitors module. This allows for measuring more than one asset type when creating a PMM.

Asset Category Main

Module(s): Asset Management



The Asset Category is the second highest level of grouping after Asset Class. The Asset Category Main frame allows you to create and define codes to group together units with similar functionality within your fleet.

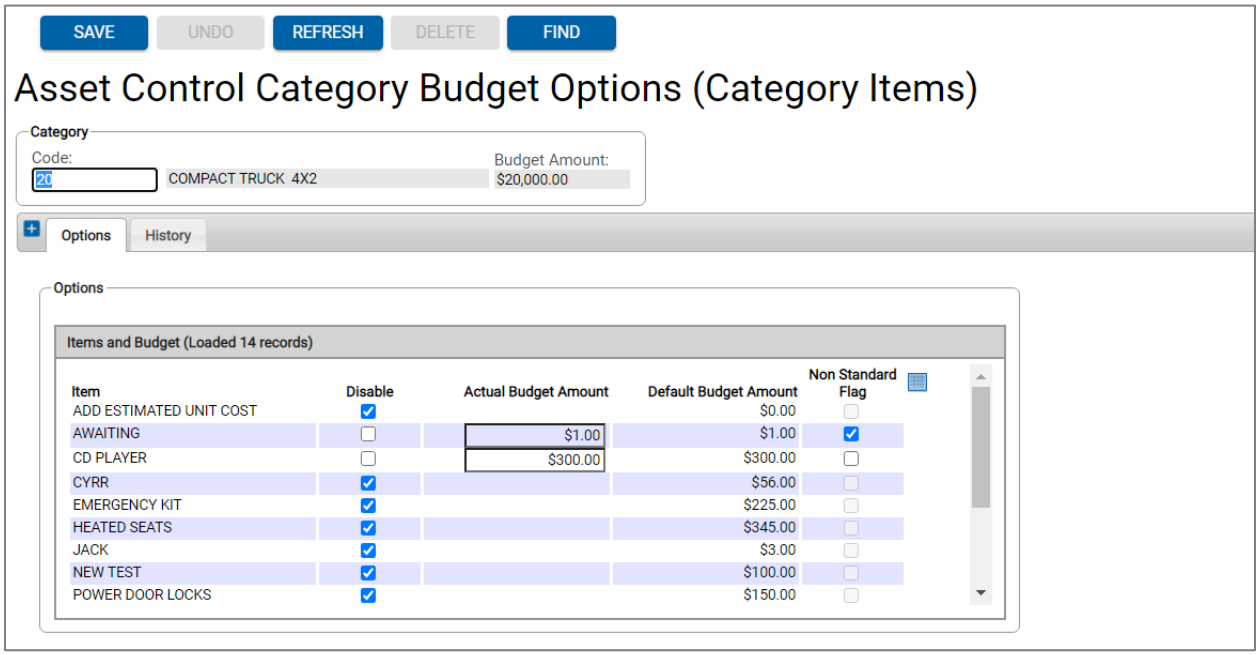
Category groupings help simplify the procurement, budgeting, and analysis where details like year, make, and model are too specific. After creating Category Codes, you can group units with similar Technical Specifications, or Tech Specs, into a single Category.

The Details tab allows you to define Depreciation, Financing, Life cycle, and Replacement Parameters for the Category Code. You can view the list of Unit and/or Component Numbers assigned to the Category Code on the Units/Comps tab.

You can configure Telematics settings on the Telematic Elements tab. You can enter the Preferred Job Code for when Work Requests are created or you can choose No Action or No Fault if you want to ignore the fault code that comes in from the ECU.

Category Equipment Options

Module(s): Asset Management



The Category Equipment Options frame allows you to configure optional equipment items for Category Codes. Category Equipment Options are additional options such as a Two-Way Radio or a Trailer Hitch that can be added when purchasing new equipment. These items are created and maintained on the Item Master Definition frame.

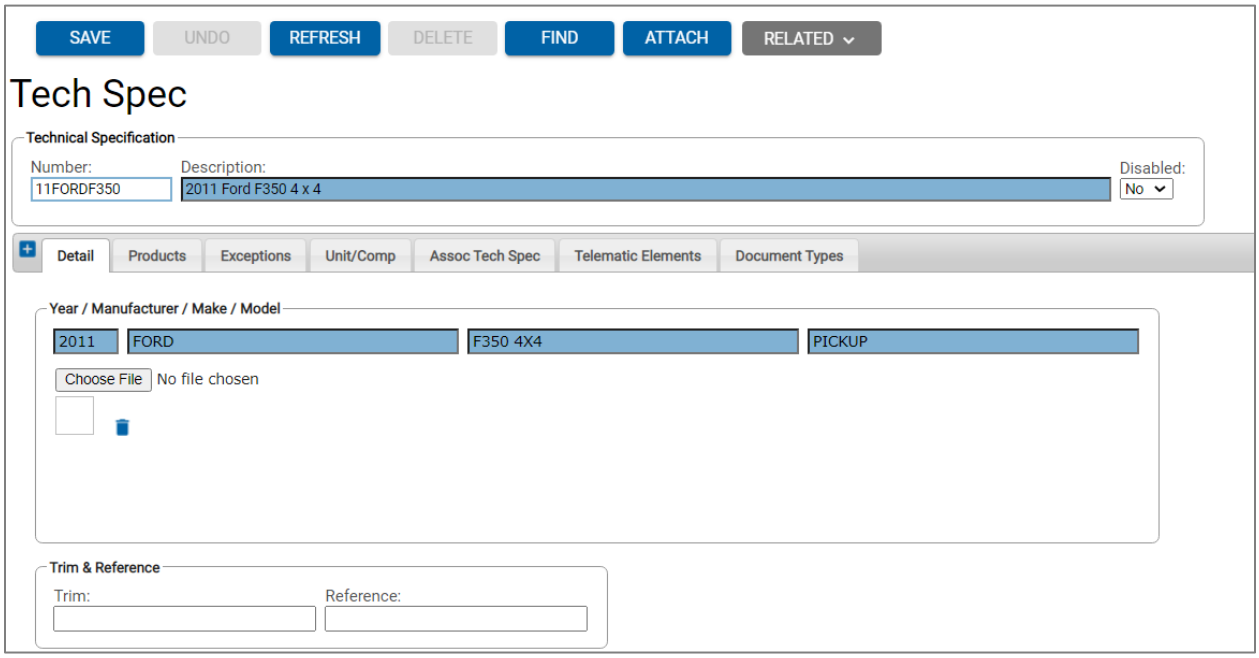
The items and budget options setup on this frame will appear as options on the Category Options tab of the Unit Request and Unit Purchase Requisitions frames when requesting a Unit with the specific Category Code.

If System Flag 1079 is set to 'Y', the user can change the Default Budget Amount field on the Category Equipment Options frame. The Non-Standard Flag checkbox is a customer-specific functionality that requires extra approvals when Categories with Non-Standard options are requested.

This History tab displays Historical Budget Change information for the Category Code in a read-only format. The i-frame will display the Change Date, New Budget Amount, and the Changed By User.

Tech Spec Main

Module(s): Asset Management, Workflow Management, Fuel Management



A Technical Specification, or Tech Spec, includes the Manufacturer, Make, Model, Year, and expected life of the unit. Units that are similar can be assigned the same Tech Spec code. This is a required field on Unit Main.

Tech Specs are very useful in setting up Standard Job information since units that have the same technical characteristics will tend to require the same parts and labor. They can also be useful in reporting and the overall management of the life of the unit.

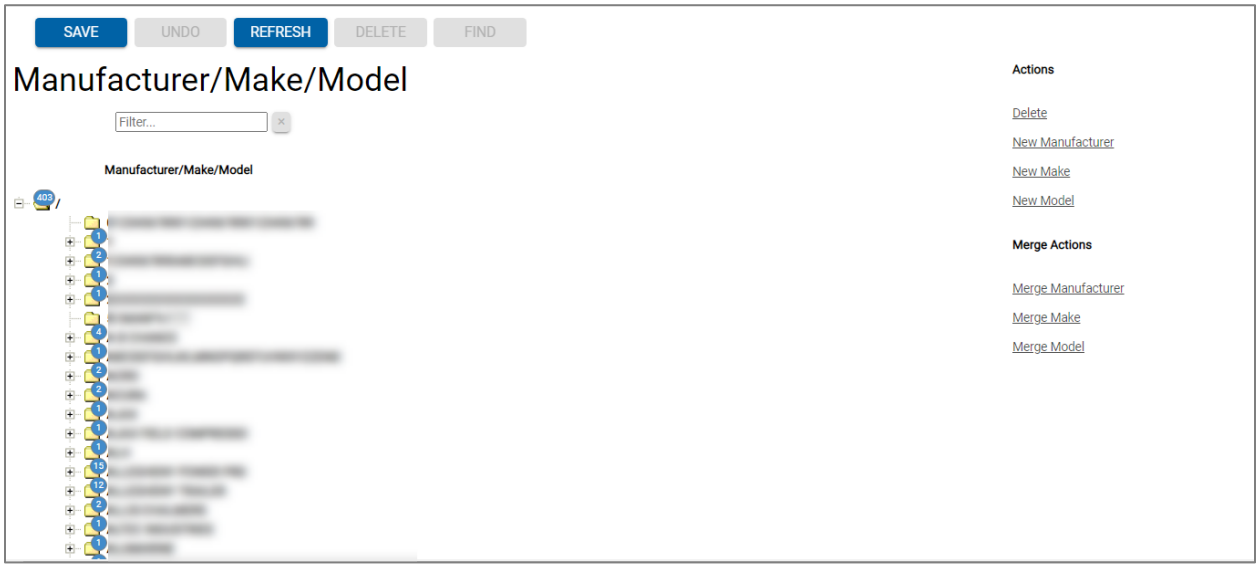
You can add consumable products, modify tank capacity and product allocation as well as define the initial new equipment warranty on the Warranty Tech Spec frame in the 'Related' links at the top of the frame.

After you decide on a pattern for the number, control of future numbers is important. The number can in some way represent the group. For example, 93PUFF150XL might represent a 1993 Pickup, Ford F150XL model.

Note: When System Flag 5268 is set to Y, the Tech Spec Main frame will break down the segments and have an LOV for each segment defined on the Company Definition frame.

Manufacturer/Make/Model

Module(s): Asset Management



The Manufacturer/Make/Model frame allows you to create and maintain a list of valid manufacturers, makes, and models to identify units within the M5 system. The Manufacturer/Make/Model combination is the basis for defining the technical specification for a unit.

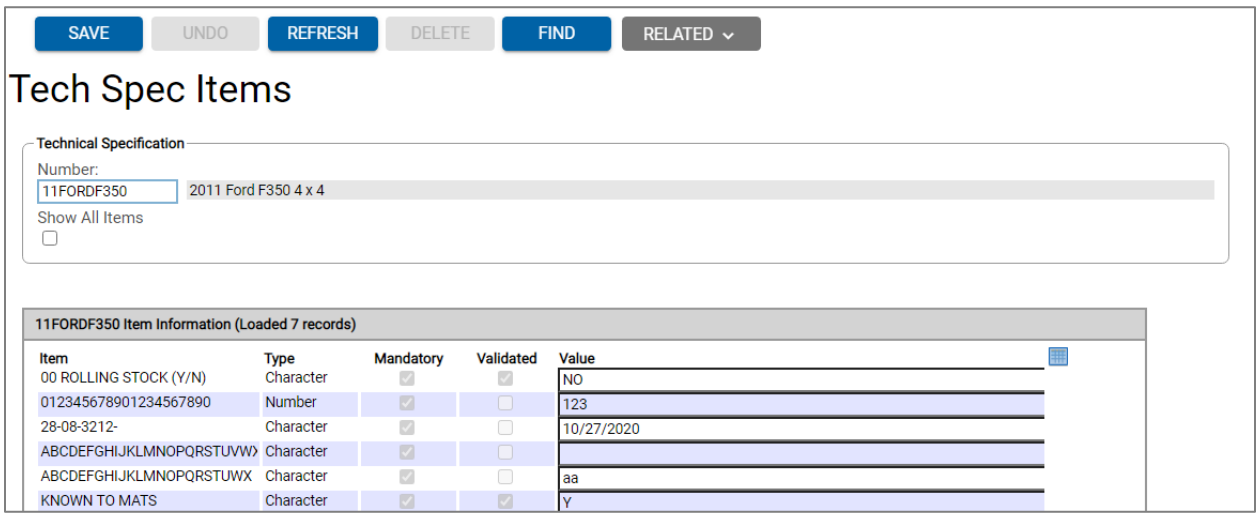
The Manufacturer Make Model is entered on Tech Spec Main to define the tech spec code. The Tech Spec code is one of the primary identifying unit codes in M5. This table is a hierarchy with one model belonging to only one make and with one make belonging to only one manufacturer.

This frame has a similar functional dynamic to the Menu Maintenance frame. The folder system houses all Manufacturers, Makes, and Models. The 'Action' links are located to the right of the folder system.

For example, the Manufacturer/Make/Model could be TOYOTA/CAMRY/CAMRY LE. After created, you can then assign this combination to Tech Spec codes on Tech Spec Main.

Tech Spec Items

Module(s): Asset Management



The Tech Spec Items frame allows you to assign and maintain a list of items to associate with a Tech Spec for informational purposes. These data items are first created and maintained on the Item Master Definition frame before they can be added here. You can find more information about Item Master Definition in the System Administrator section of this document.

Items that are designated as mandatory on the Item Master Definition frame will automatically load. To view all available items at the same time, select the Show All Items checkbox.

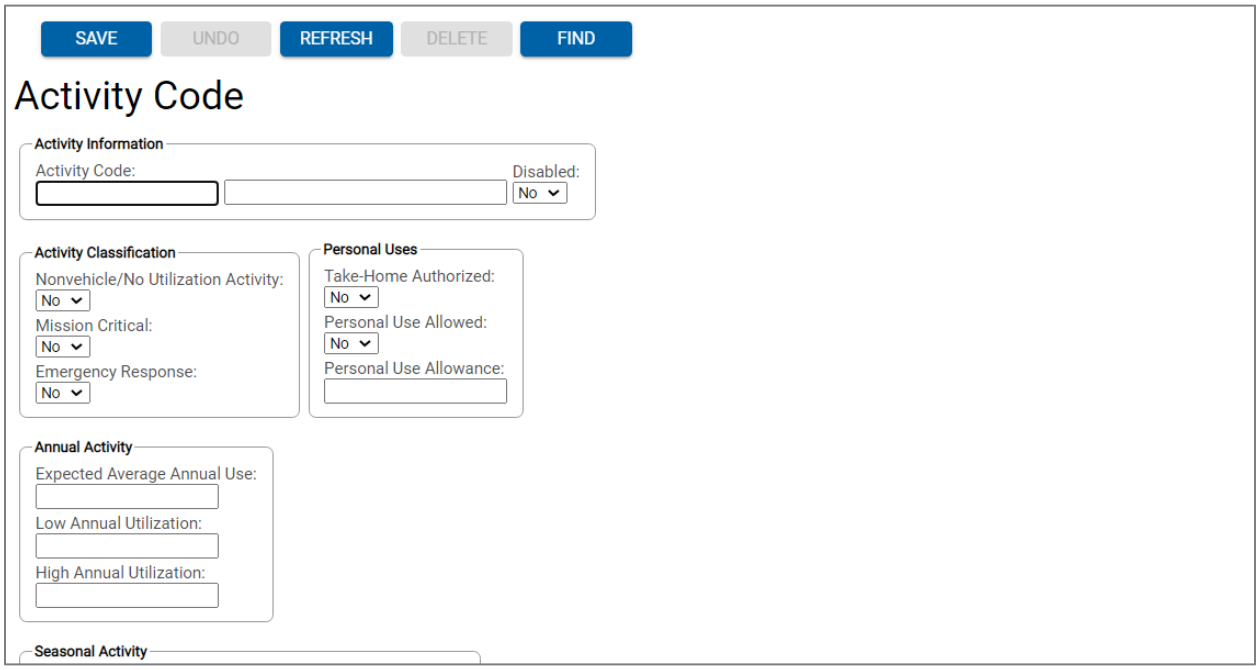
The Item name, Type, whether and whether it is Mandatory or Validated are all designated on the Item Master Definition frame.

The value field will be free form and if the item does not have the Validated checkbox selected. If the checkbox is selected you must enter a valid value. These values are also designated on the Item Master Definition frame.

Note: You will not be able to delete items that have been designated as Mandatory.

Activity Codes

Module(s): Asset Management



Activity Codes give you the ability to indicate the type of activity/purpose the unit will serve within the fleet organization. Activity Codes allows you to track the costs of equipment to support a particular activity.

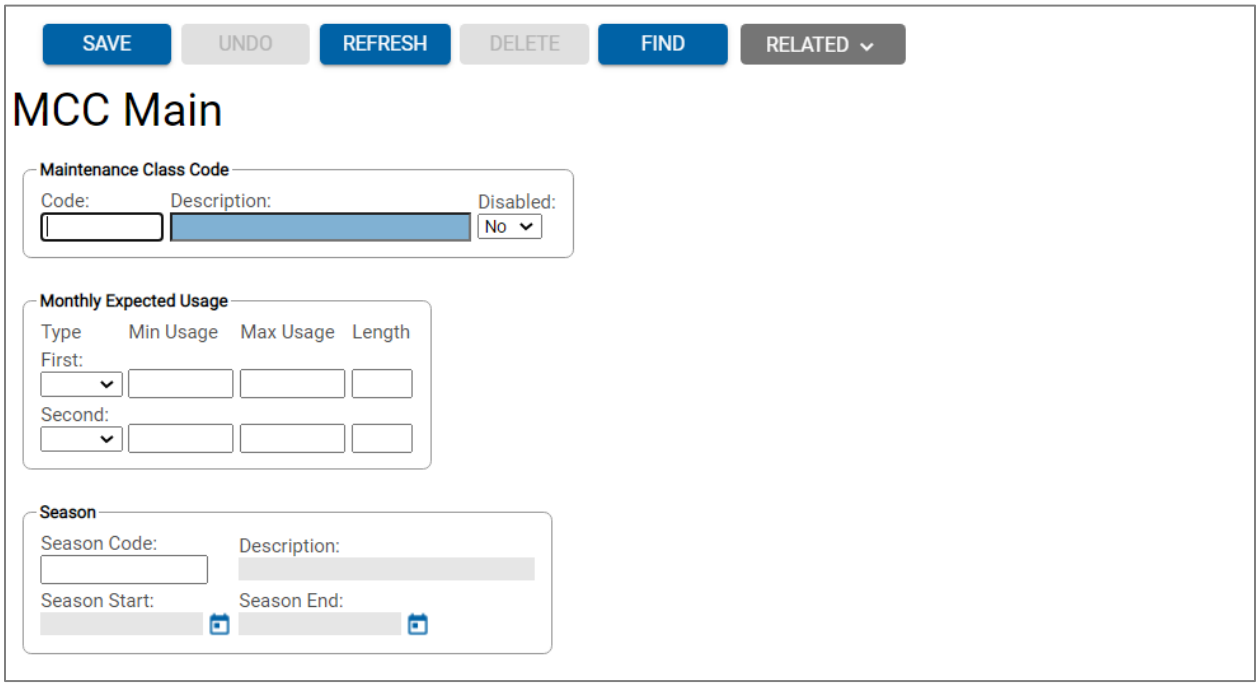
The Activity Code on a unit is a reporting class and is not required by the system. Its primary use is for identifying and comparing units with similar functions within the fleet organization by using reports. It is independent of the unit's type, location, department or any other identifier.

For example, you may want to have one activity code for law enforcement, one for administrative services and another for motor pool rentals.

By creating separate Activity Codes for each of these functions, you can create and run use and cost reports by activity/function regardless of what other ways the unit is classified within the system.

MCC Main

Module(s): Asset Management, Workflow Management



The Maintenance Class Code (MCC) gives you the ability to establish and assign preventive maintenance intervals and set expected monthly use for meter validations on units and components.

All units must have an MCC assigned, but the only requirement for an MCC is to create a code and assign a description to the code. However, in order to validate meters and use the Forecaster functionality, the user must setup the Monthly Expected Usage parameters.

You can assign an MCC to a unit on the Asset/Codes tab of Unit Main or to a component on Component Main in the Component Codes section.

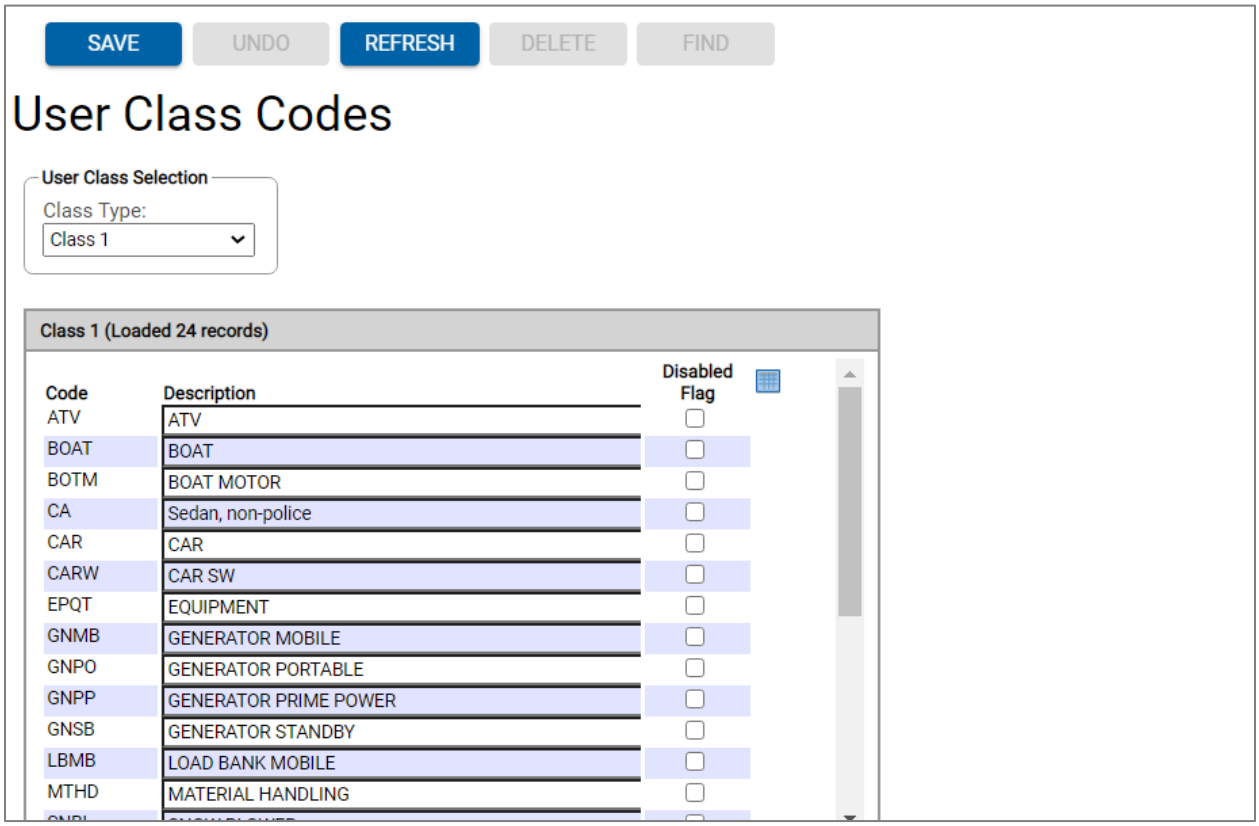
The MCC is independent of all other asset codes. Units with different activities and classifications can be assigned to the same MCC.

Within each MCC the user can define work-scheduling criteria used by the Forecaster batch program such as seasonal use, meter type and maximum expected usage per month.

MCC's are also used in setting up Standard Job intervals and assigning jobs. All units with the same MCC will be on the same service cycle and have the same standard jobs assigned.

User Class Codes

Module(s): Asset Management



User Class Codes can be setup to accommodate your organization's need to group units in ways that are not already defined in M5.

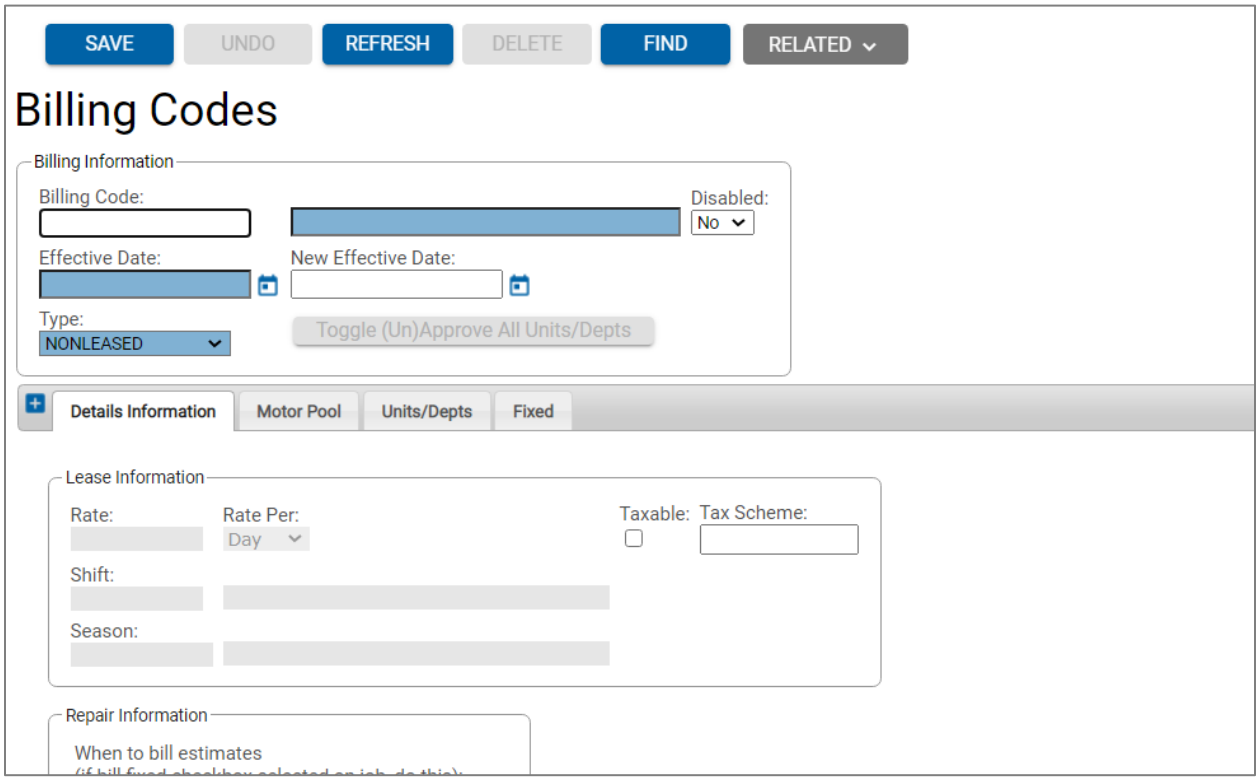
Five user-defined code tables are available. They are broken up by Class Type (1-5). You can use each type to create hundreds of different codes.

These are user-defined codes, so it is up to the user or organization to determine how the codes are to be entered and used in a way that will best suit the organization's needs.

User Class Codes are not required on the Unit record, however, by using System Flags 1181-1185 you can make them mandatory on unit entries.

Billing Codes

Module(s): Asset Management, Billing



The Billing Codes frame allows you to create and maintain Billing Code records that define what to bill and how much. A billing code can be attached to a unit when the unit is created on Unit Main, or it can be assigned to a department on Department Main.

Billing codes provide the detailed information the system needs to collect and calculate a unit's billing such as the usage rate, charge back items, fixed charges, penalties applied, and so forth. This is a required field on the Unit Main frame.

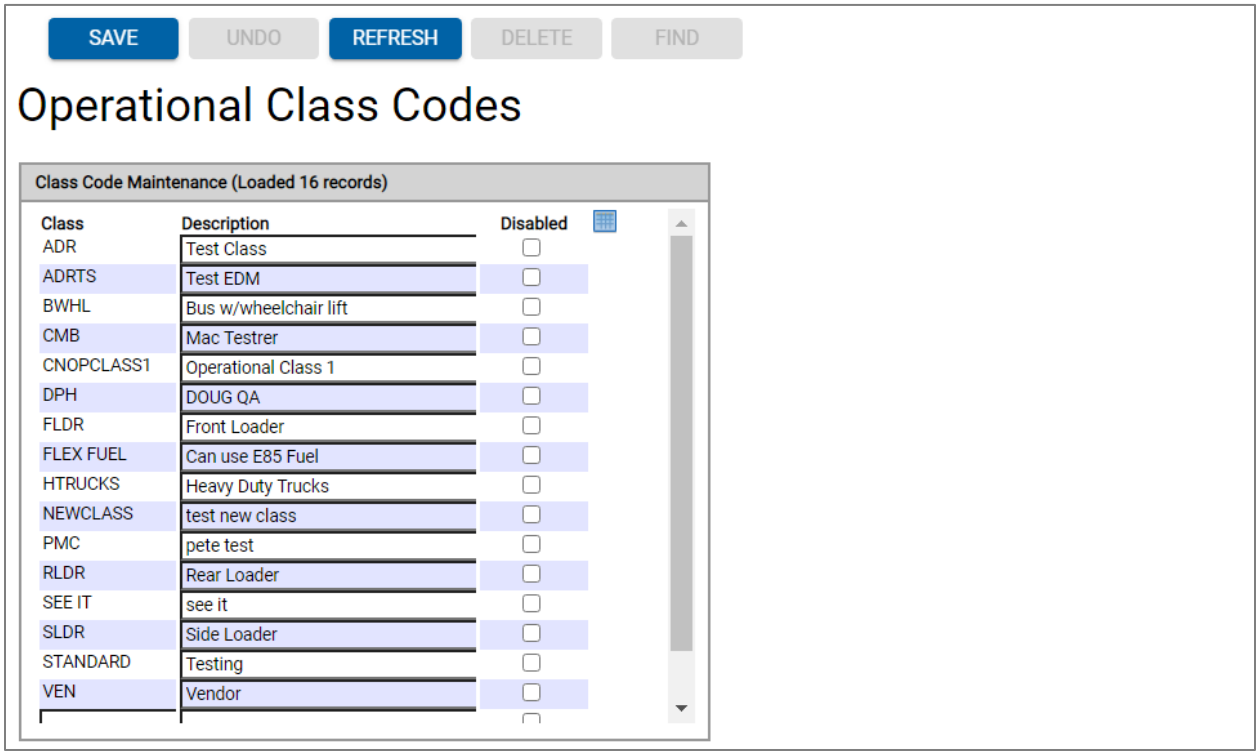
There are three broad types of billing codes:

1. **Leased** – Units are billed for leases, usage, fuel and repairs.
2. **Motor Pool/Task** – Units are billed for motor pool tickets. Usage cannot be charged, but a “Charge per Use,” can be entered for the rate for usage entered on a motor pool ticket. While repairs and fuel can be set to bill, charges will bill to the owning or using department and not the department that opened the ticket.
3. **Non-Leased** – Units cannot be billed for leases or motor pool, but can be billed for usage, repairs, and fuel.

To implement M5 billing requires additional configuration. The requirements are described in the M5 Billing Manual.

Operational Class Codes

Module(s): Asset Management, Unit Availability

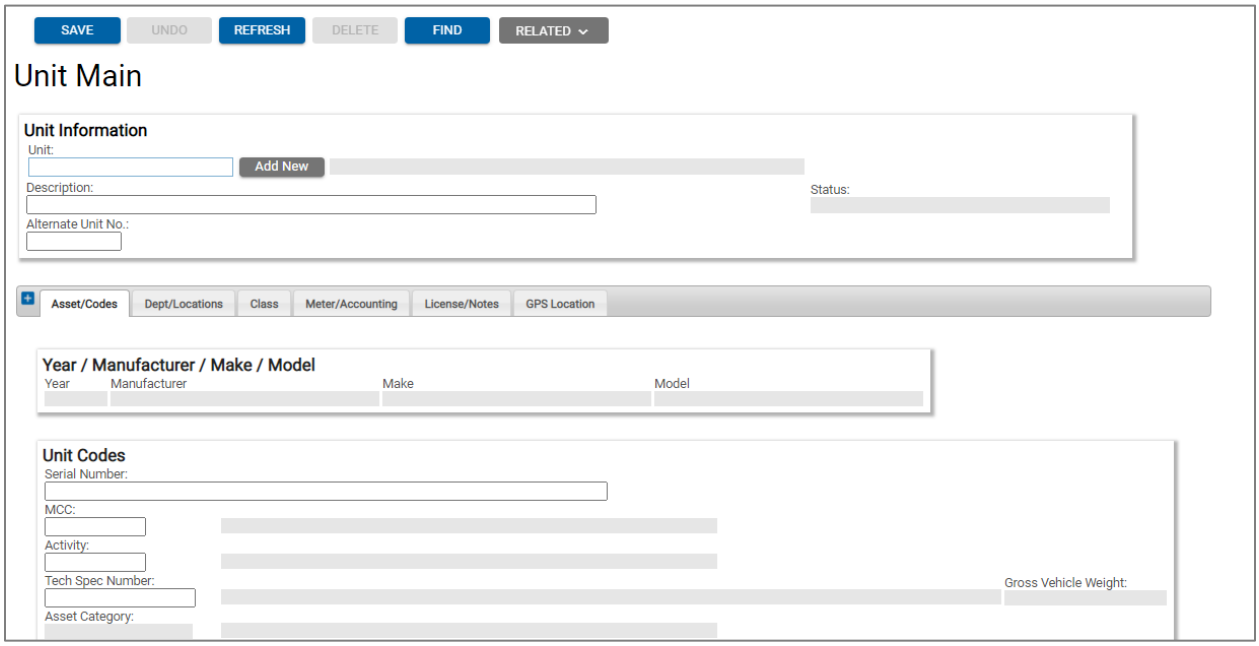


Operational Class Codes are user defined codes used to classify the different types of equipment that will be tracked using the Unit Availability Module. A unit must have an Operational Class Code assigned to it on Unit Main to track it using Unit Availability.

This frame allows you to create and maintain a list of Operational Class Codes to assign to the different types of units in your fleet. For example, a garbage truck would be a different operational class than a pickup truck or a police cruiser.

Unit Main

Module(s): Asset Management, Workflow Management, Warranty Management, Fuel Management, Billing, Shop Planning, Inventory Management, Unit Availability.



The Unit Main frame allows you to create new units and receive them into your fleet. You can create a new unit right on the Unit Main frame or you can receive on into inventory as the last step in the Unit Request Process.

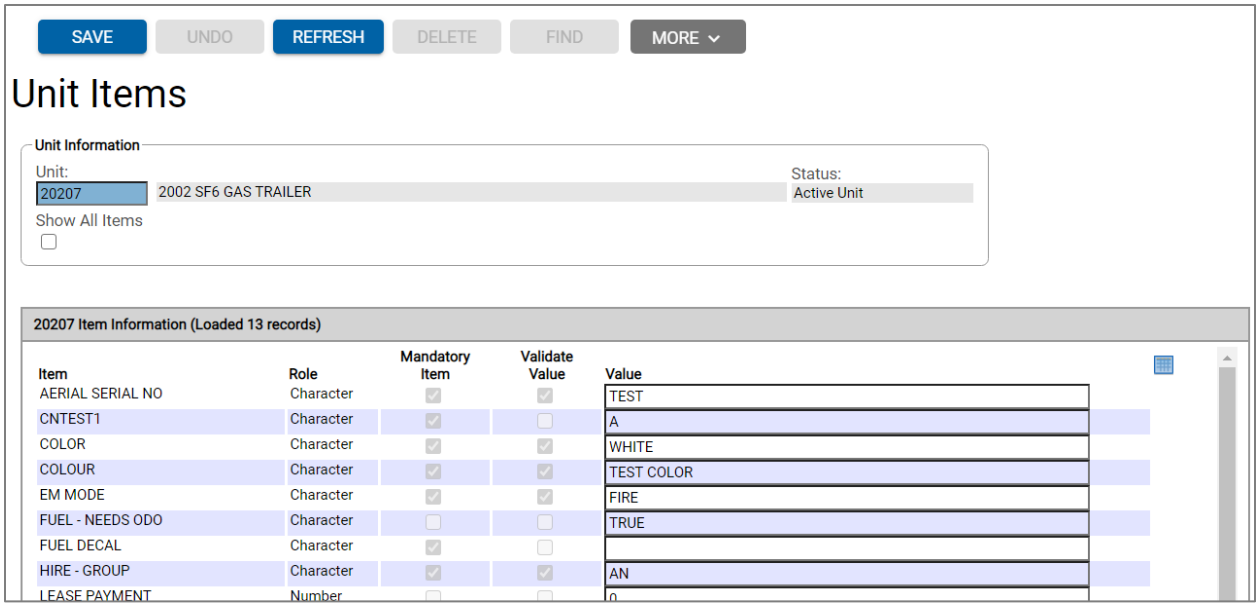
Your organization can use this frame to effectively manage crucial information about the assets throughout their life cycle.

Units are defined in FleetFocus™ M5 as those assets that require maintenance tracking. Units need not be strictly vehicles but can be compressors, radios, or anything the user defines as an asset to be managed.

All units require a Maintenance Class Code, Billing Code, Owning and Using Departments and a Technical Specification. Other information can be added to the unit, but not all fields are mandatory.

Unit Items

Module(s): Asset Management



The Unit Items frame allows you to assign and maintain a list of items to associate with a unit for informational purposes.

These data items are first created and maintained on the Item Master Definition frame before they can be added here.

To view or modify a unit's existing items, enter a valid unit number from Unit Main in the Unit Number field and tab off. The list of items will display in the Item Information i-frame.

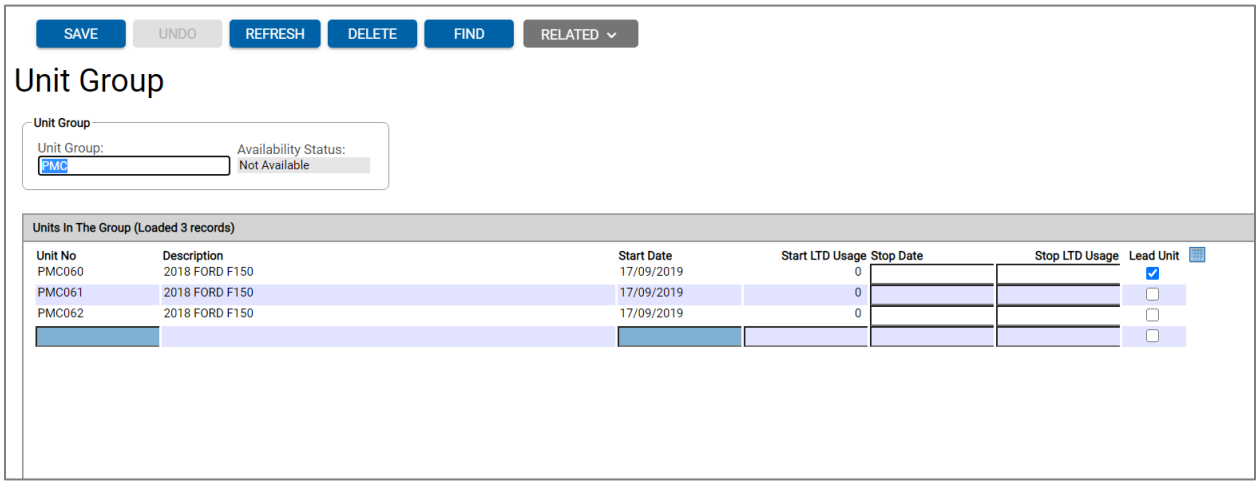
The Items that are designated as mandatory on the Item Master Definition frame will automatically load. To view all available items at once, select the Show All Items checkbox.

The Item name, Type, whether and whether it is Mandatory or Validated are all designated on the Item Master Definition frame.

The value field will be free form and if the item does not have the Validated checkbox selected. If the checkbox is selected you must enter a valid value. These values are also designated on the Item Master Definition frame.

Unit Groups

Module(s): Unit Availability



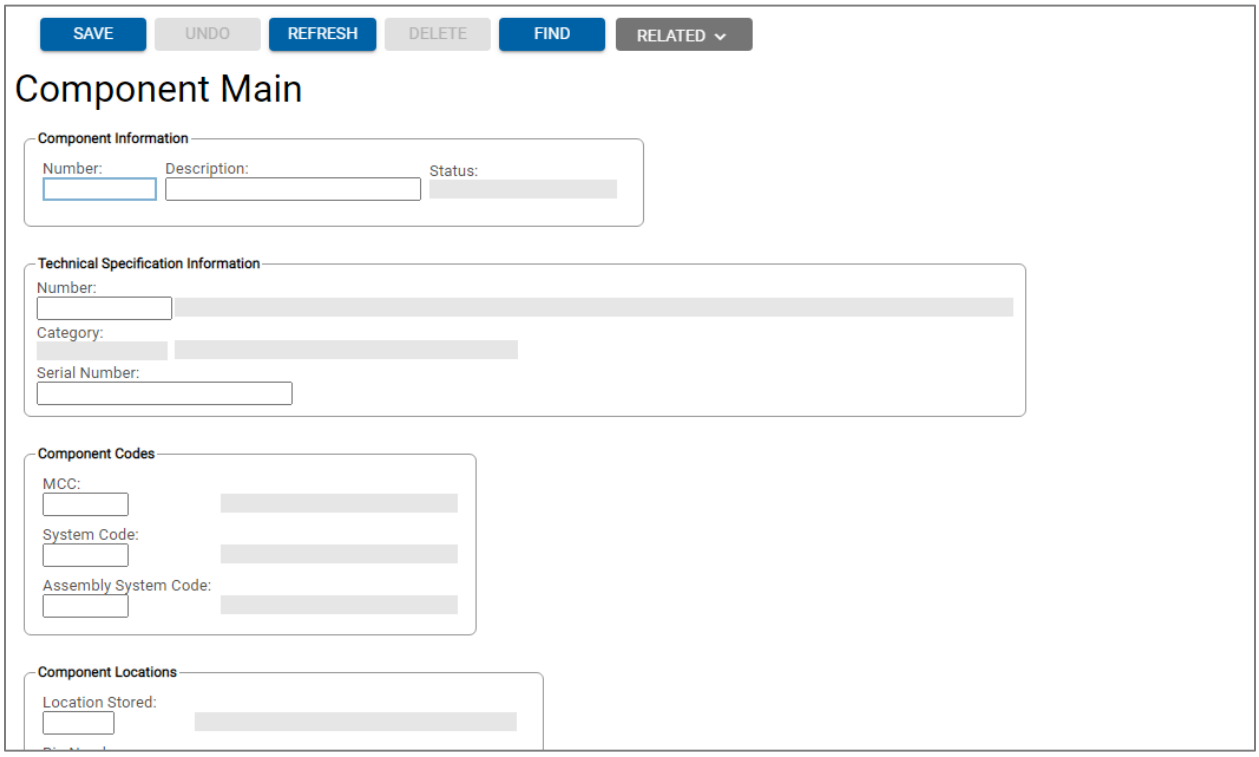
The Unit Group frame allows you create and maintain groups of units based on certain requirements or similarities the units might share. Unit Groups can be used in the Unit Availability module.

For Unit Groups, the Availability Status Codes are joined -- meaning when one unit is placed on a work order, the Availability Status for the rest of the group changes as well. The Unit Status Code must also be set to ‘Y’ for Allow Unit Group.

Each group must have a designated “lead” unit. Select the Lead Unit checkbox to designate a unit as the “lead” for the unit group.

Component Main

Module(s): Asset Management, Workflow (Component Rebuild)



A component is a piece of equipment you want to track in order to evaluate its life cycle cost and performance. Component Main allows you to create and maintain records for these essential parts used in the operations of your fleet organization.

Components do not have a using department, nor does it have a depreciation record or billing code. Therefore, costs associated with a component do not bill to a department. It is not a full, road worthy piece of equipment but is frequently a part of a road worthy unit.

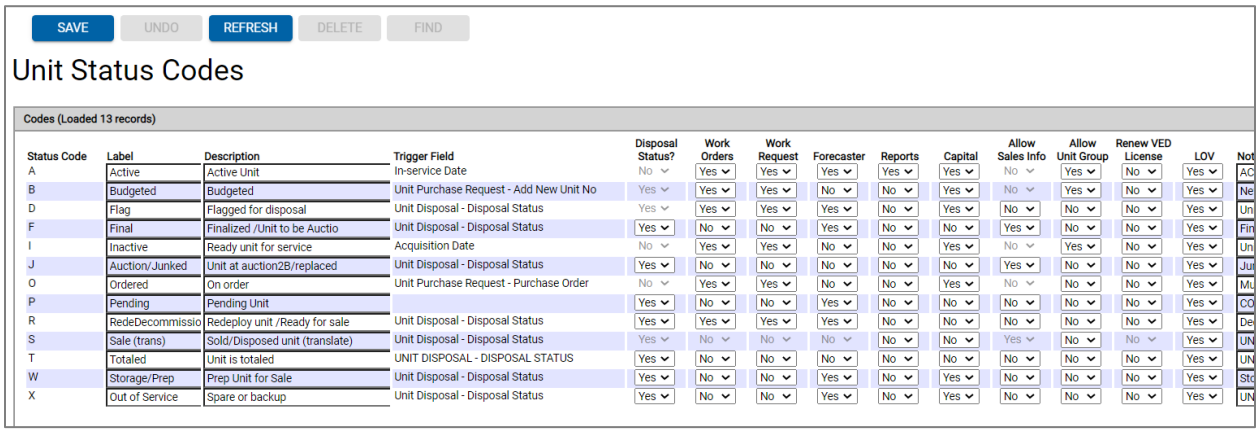
In the same way that materials and labor are charged to a unit, materials and labor are charged to a component through the work order process.

System Flag 1218 controls whether components are included in the Forecaster batch process when preparing reports.

Asset Life Cycle Codes

Unit Status Codes

Module(s): Asset Management



Unit Status codes define the stage of use or condition of a unit during its fleet life cycle. These values are hard coded in the system and control what application functions the system will allow to be performed on the unit.

You can modify the Label or Description of any Unit Status Code. The Trigger Field is read-only and identifies what event will trigger a unit to be designated with that Unit Status Code.

The six main categories of the statuses listed above are:

1. **Active (A)** – When you assign a unit an in-service meter and in-service date, you are converting an “Ordered” or “Inactive” status unit into an “Active” status unit. “Active” status units can use all available FleetFocusTM M5 frames and functions.
2. **Budgeted (B)** - When using the Unit Purchase Requisitions frame to budget future unit purchases, a unit is considered “Budgeted” if it has been requested by the user, but a purchase order number has not be assigned to the unit request. “Budgeted” status units are in the initial unit acquisition stage and have no working unit functions (for example, “Budgeted” status units cannot be fueled and cannot have work orders or work requests opened on them). You are able to run reports, however, against these units.
3. **Flagged (D)** – When you decide to dispose of a unit during the replacement modeling process using the Replacement Model Manager frame or during the initial disposal stage using the Unit Disposal frame, the unit is considered flagged for disposal and placed in the “Flagged” status. “Flagged” status units can use all available FleetFocus™ M5 frames and functions. “Flagged” units may be considered available for sale, broken down for parts, junked or further managed as spares to eventually return to service (“Active” status) at some future date.

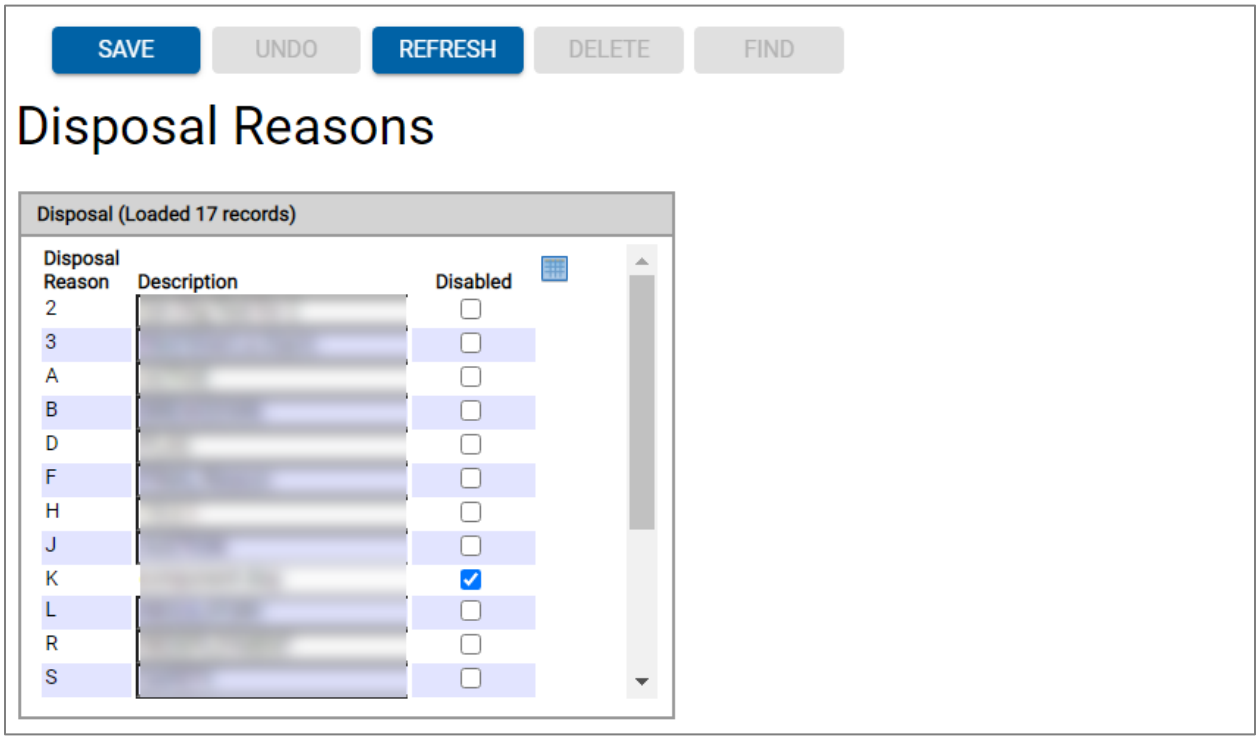
4. **Inactive (I)** – When you assign a technical specification, maintenance class code, serial (VIN) number, arrival date, and acquisition date in the Unit Main frame to a unit in an “Ordered” status, you are converting it into an “Inactive” status unit. The unit will remain in the “Inactive” status until you assign it an in-service meter and in-service date on the Unit Main frame. You can open a work request (primarily for unit acquisition/preparation work), open a work order and issue fuel to an “Inactive” status unit. If you are not using the Unit Purchase Requisition frame to budget and order units, a unit is placed in the “Inactive” status when first entered on the Unit Main frame usually when a unit arrives from the vendor.
5. **Ordered (O)** – When using the Unit Purchase Requisitions frame to order unit purchases, a unit is considered in the “Ordered” status if it has a requisition number and purchase order number assigned to it. “Ordered” status units cannot be fueled and work orders cannot be opened on them. Work requests can be opened on them for acquisition preparation work.
6. **Sold (S) -** After selling a unit and entering sales information on the Unit Disposal frame, M5 will place the unit into “Sold” status. You can view information on a “Sold” unit on the Unit Main frame. Since the unit no longer has active fleet status, you cannot fuel, open work requests or open work orders against a “Sold” status unit. With appropriate authorization, a unit may be un-sold if circumstances dictate.

There are nine Yes/No dropdown fields for each Unit Status Code:

1. **Disposal Status** – Certain codes cannot be disposal statuses and certain codes have to be disposal statuses. For codes that must have a certain designation, the dropdown is read-only and grayed out.
2. **Work Orders** – This dropdown controls whether units with this Unit Status Code can have work orders opened against them.
3. **Work Request** – Same as the work orders dropdown, this will control whether units can have work requests opened against them.
4. **Forecaster** – This controls whether or not units with the unit status codes will be included when the batch process Forecaster is executed. For example, you may want to exclude any units in a Totaled status from Forecaster.
5. **Reports** – This controls whether units with this status will show up on reports. You may want to exclude all sold units for reporting purposes.
6. **Capital** – This controls whether or not Capitalized Cost information is allowed on the Unit Accounting frame.
7. **Allow Sales Info** – This controls whether sales information can be entered on the Unit Disposal frame for units. Certain non-disposal statuses will have this field grayed out and the ‘Sold’ Disposal Status will also have this field grayed out.
8. **Allow Unit Group** – Controls whether to allow units to be assigned to a Unit Group.
9. **Renew VED License** – This dropdown controls Vehicle Excise Duty (VED) license renewal.

Disposal Reasons

Module(s): Asset Management



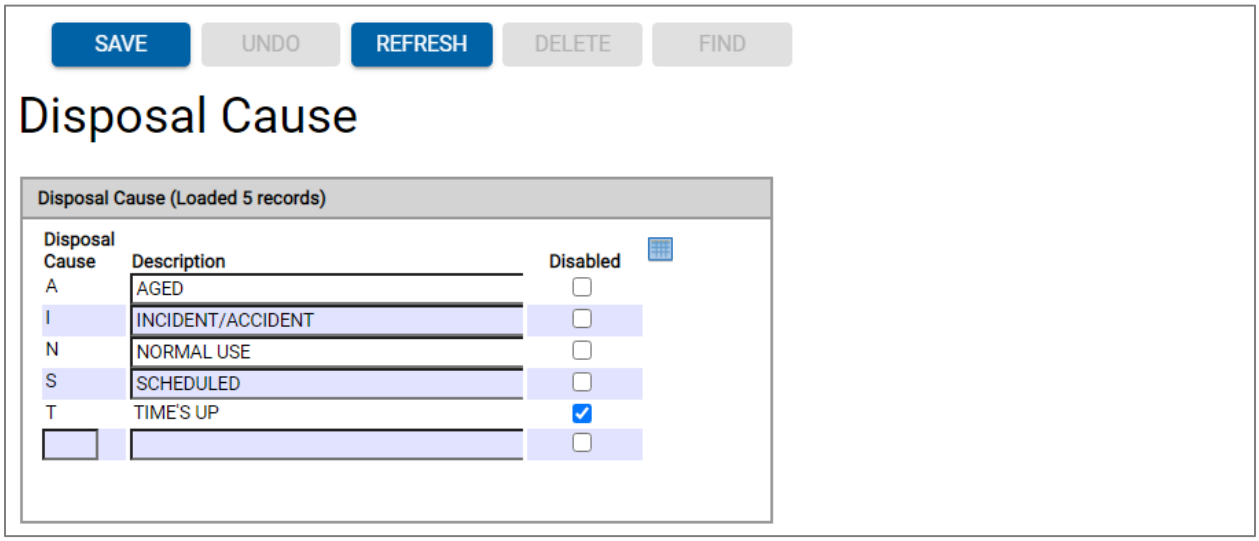
The Disposal Reason Codes frame allows you to create and maintain a list of codes used to identify the reason for disposing of a unit on the Unit Disposal frame.

The Disposal Reason is a required field on Unit Disposal. These codes are user-defined so it is up to your organization how to best format them to suit your needs.

Some examples of potential codes would be: A – Accident or E – End of Life or T – Totaled.

Disposal Cause

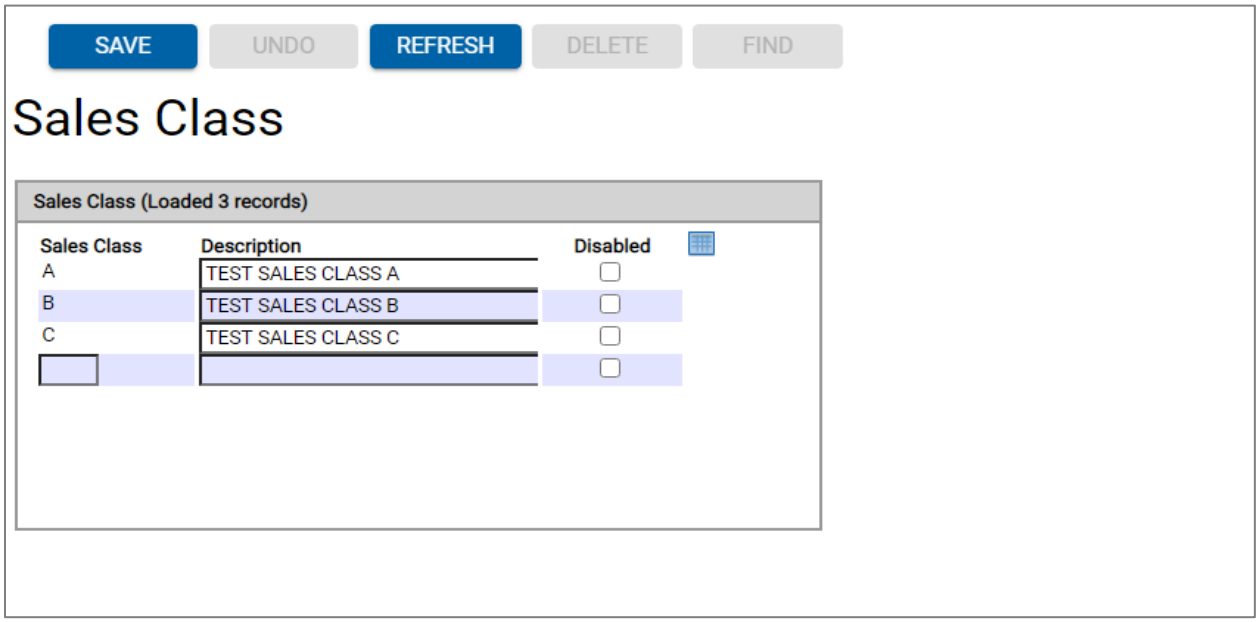
Module(s): Asset Management



The Disposal Cause frame allows you to define additional codes to indicate the cause for flagging or disposal of a unit on the Unit Disposal frame. These codes indicate why the unit was actually disposed of.

Sales Class

Module(s): Asset Management



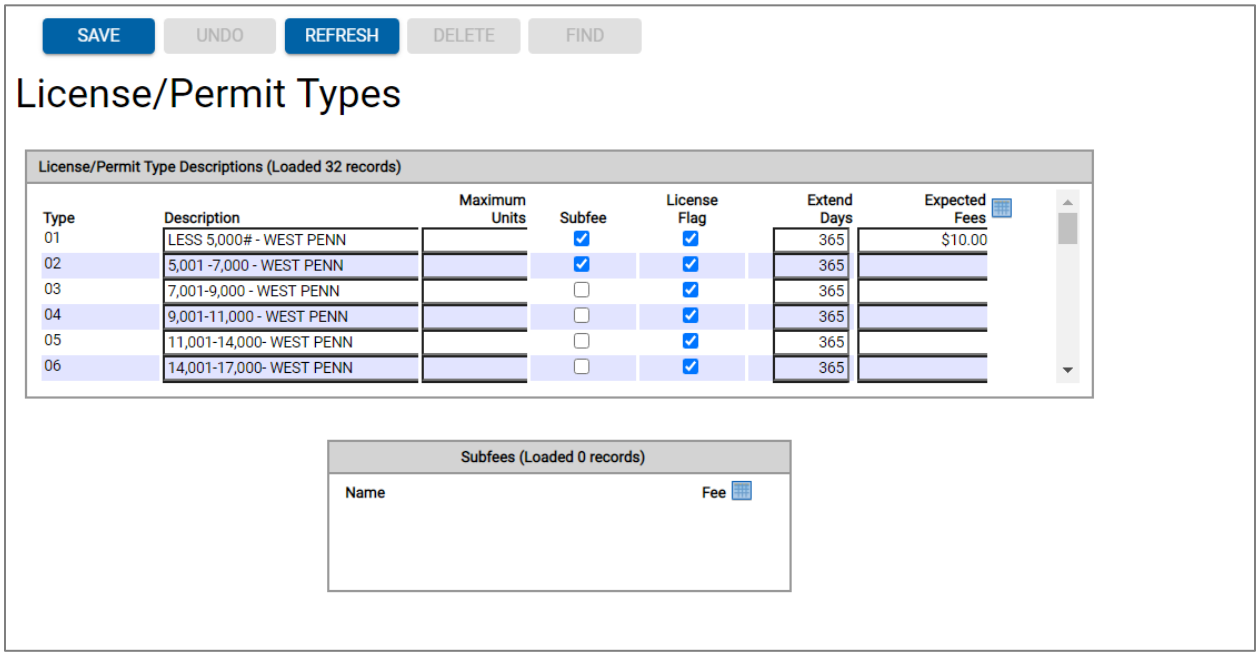
You can use Sales Class codes to help further define and report on Unit Disposal activities. This field is available on the Unit Disposal frame if System Flag 5287 is set to 'Y', it is not a required field, but it can be used as a reporting tool.

Additional Asset Configuration Codes

Depending on the functionality a client wishes to implement, additional configuration can be established in M5 to support additional features and functionality.

License/Permits Types

Module(s): Asset Management



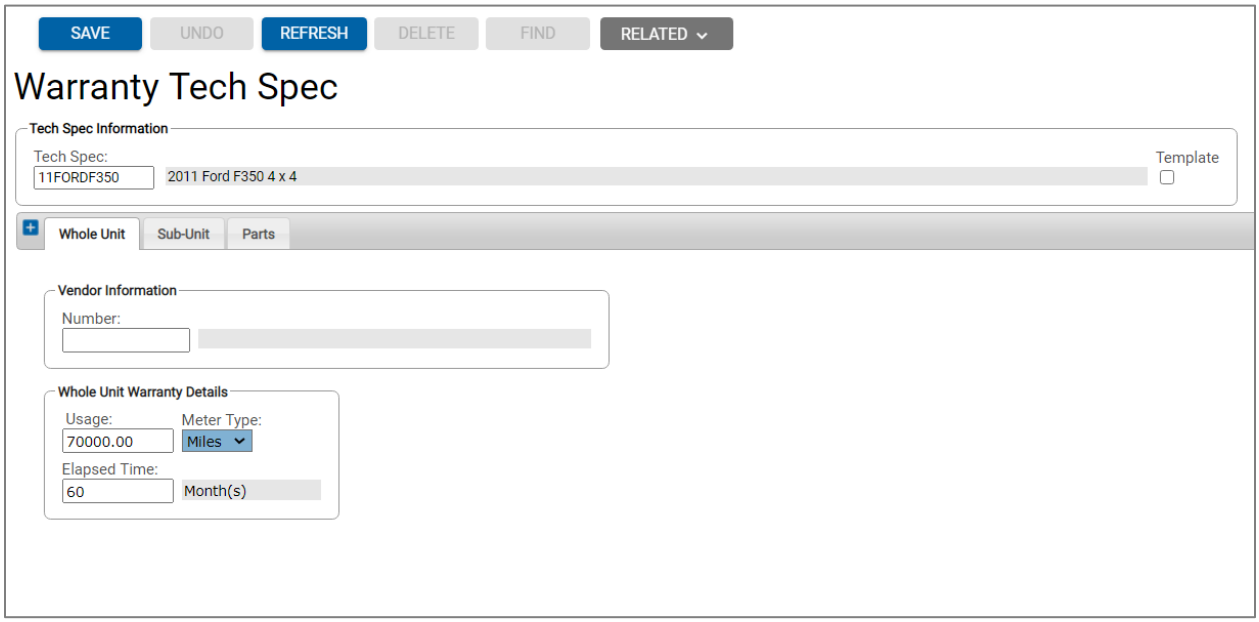
The License Permit Types frame is used to create and maintain codes to indicate the types of licenses and permits that will be assigned to units. These codes can be assigned on Unit Main or on the License/Permit Admin frame, depending on the value of System Flag 2015. The value in the Maximum Units field represents the number of Unit Licenses or Permits that can use this Type code.

To associate subfees with the license or permit type, select the Subfee checkbox. This will load the fields in the Subfees i-frame. Type in a name for the subfee (14 character limit) and a value in the Fee field (dollar amount).

The License Flag must be selected for License Types if you want them to be eligible to be the Primary License for a unit.

Warranty Tech Spec

Module(s): Asset Management, Warranty Processing



The Warranty Tech Spec frame allows you to setup and define warranty parameters at the Tech Spec level. This gives you the ability to group warranties together for units within the same Tech Spec. This will save time when entering warranties that are the same for a group of units.

After the tech spec warranties are defined and the tech spec is applied to the unit, the warranty terms are carried down to the unit. Any changes to the terms of the warranty will not update at the unit level. Only new warranty terms applied at the tech spec level will then carry down to the unit. Otherwise, changes must be made at the unit warranty level.

On this frame you can define:

- **OEM Whole Unit Warranty** – Bumper to bumper.
- **OEM Extended Warranties** – Systems and assemblies.
- **OEM Parts** – Parts installed on the equipment at time of delivery.

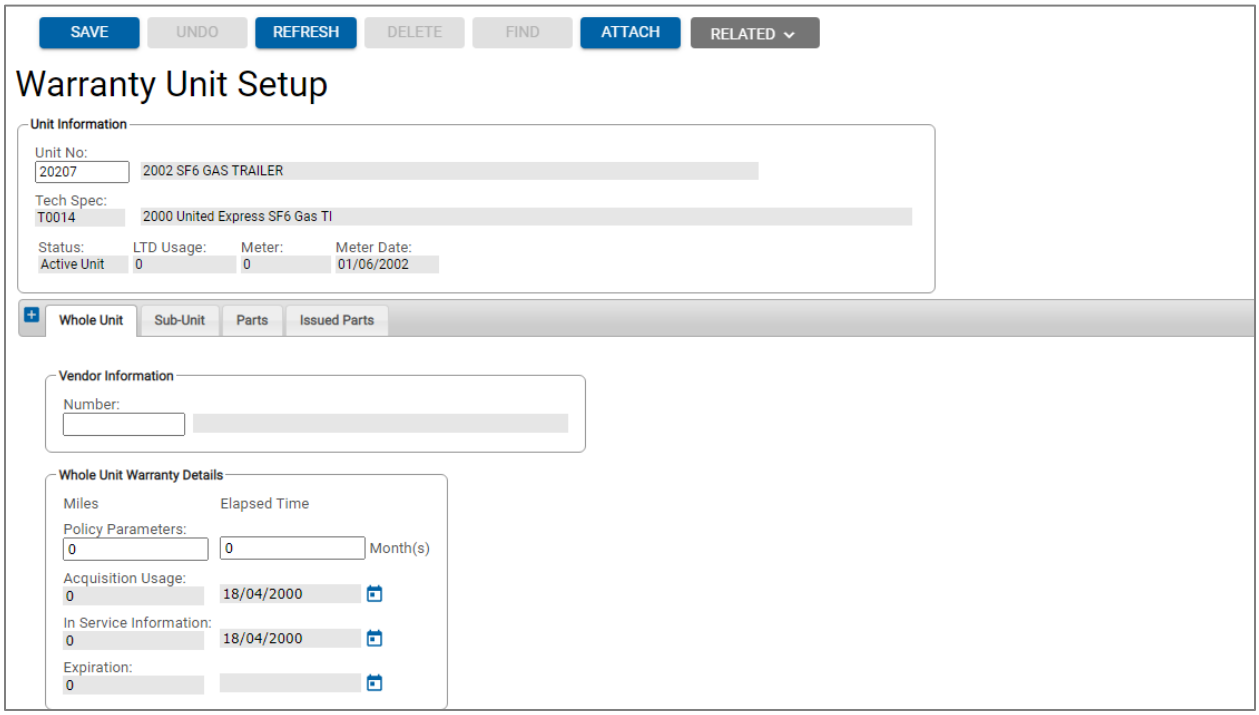
Note: All warranty processing actually happens at the unit level. See Warranty Unit Setup.

Warranty Tech Spec Template - If you are using a tech spec warranty as a standard, select the Template checkbox. Only users that have the privilege of **UPD WARR TECH SPEC** are authorized to update the template.

The settings for System Flags 1332 and 1333 are very important in Warranty Processing as they determine how M5 will calculate initial warranty usages and dates along to determine the appropriate warranty expiration values.

Warranty Unit Setup

Module(s): Asset Management, Warranty Processing

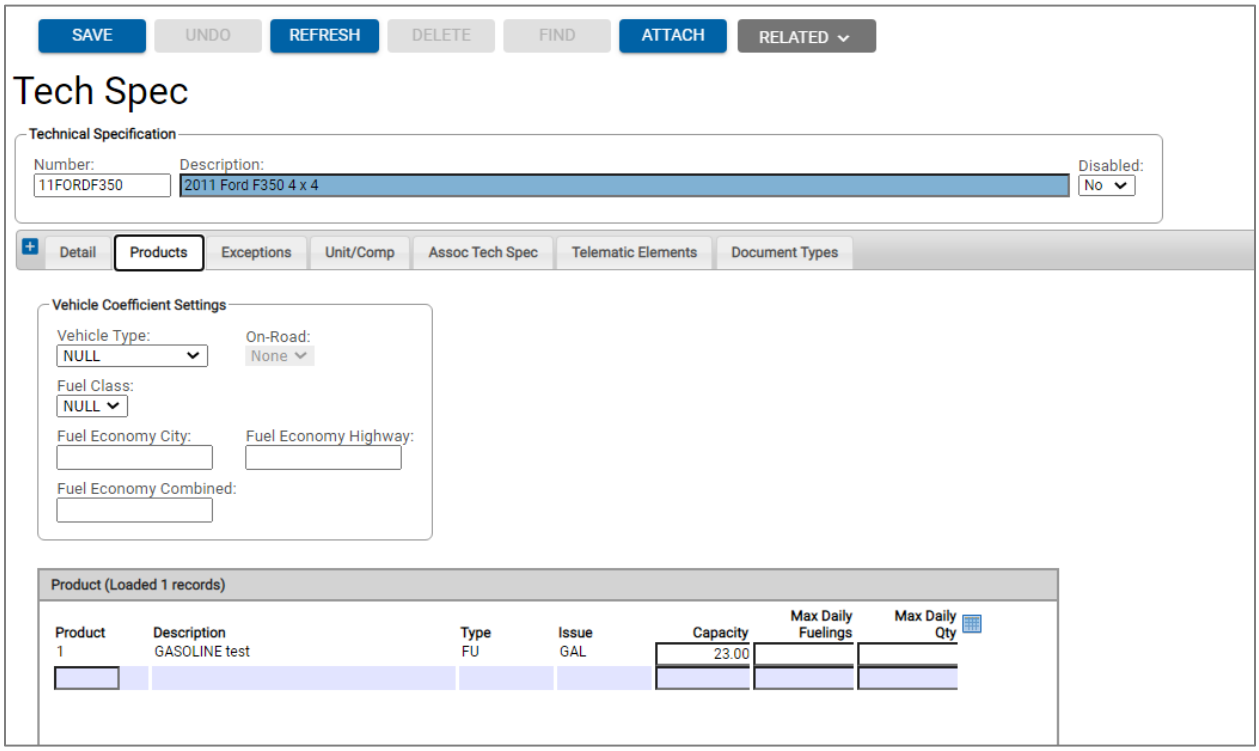


The Warranty Unit Setup frame displays the warranty terms setup at the Warranty Tech Spec level (if they exist) and allows you override those terms or setup individual warranties at the unit level.

This frame allows you to add additional sub-unit warranties, change or override terms, add warranty parts, and change expiration dates (depending on the values of System Flags 1132 and 1333).

Tech Spec Main – Products Tab

Module(s): Asset Management, Fuel Management



The Products tab can be used to assign consumable fuel products and fueling information to the Tech Spec code. You must first setup and define these products on the Product Main frame.

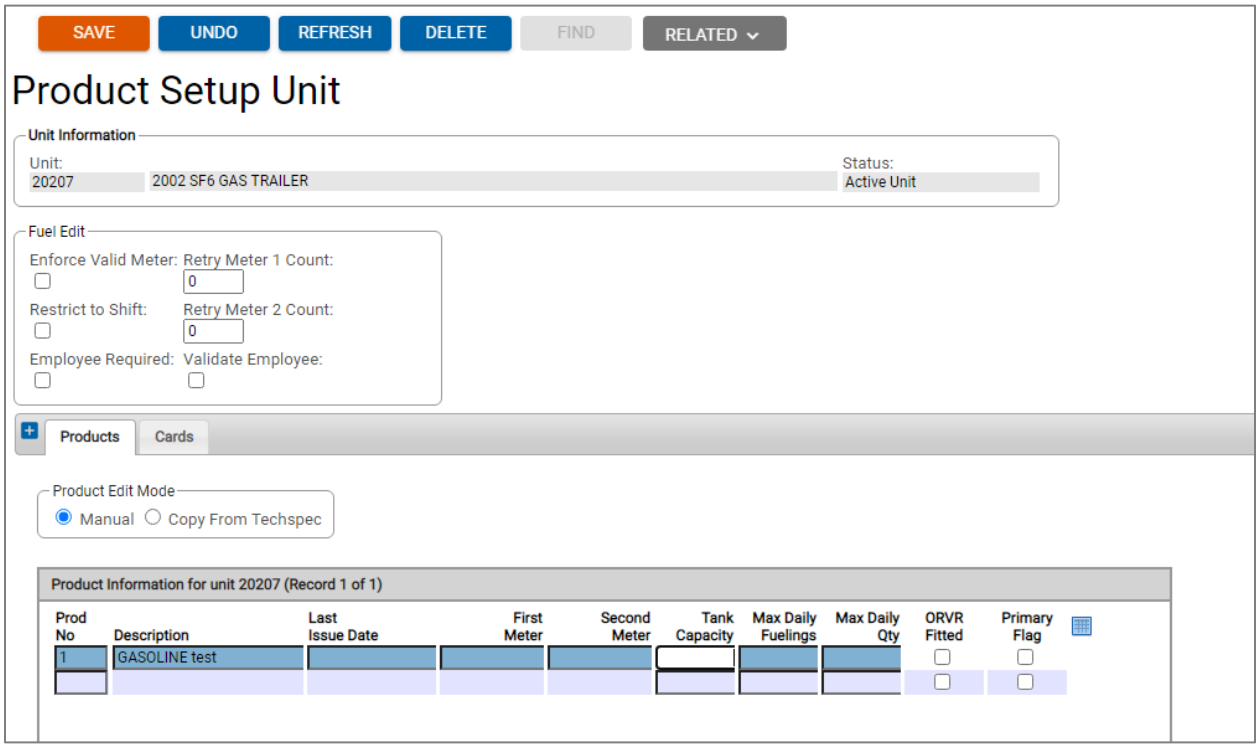
The Vehicle Coefficient Settings are used in Greenhouse Emission reporting.

To assign a consumable product from Product Main to the Tech Spec, type in a product code or double-click in the Product field to select one from the LOV. The Description, Type, and Issue fields will automatically display the information from Product Main.

You can then enter in a Capacity for the tank, Max Daily Fuelings, and Max Daily Qty. for fueling purposes.

Product Unit Setup

Module(s): Asset Management, Fuel Management



The Product Setup Unit frame allows you to associate a product from Product Main to a specific Unit. First, you must setup the products on this frame before you can issue the product to the unit.

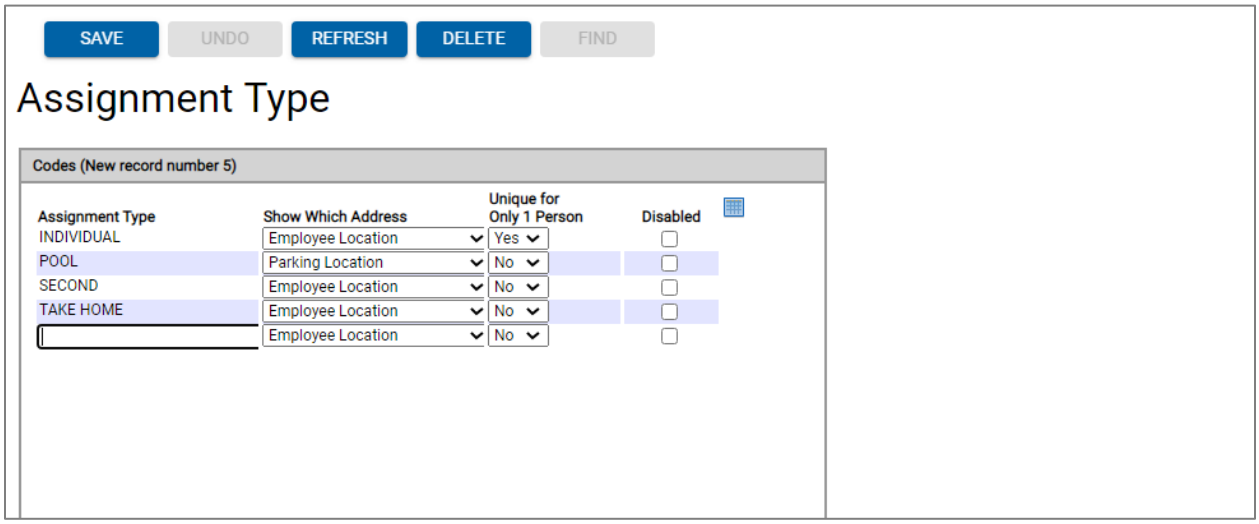
You can create these associations manually on the unit or you can copy from the Unit's Tech Spec. The default is 'Manual' which allows you to manually add products to the unit. 'Copy from Tech Spec' allows you to pick and choose which products you want to copy from the Unit's Tech Spec.

ORVR Fitted - Indicates if the unit has an 'Onboard Refueling Vapor Recovery' vehicle emission control system to capture fuel vapors from the vehicle gas tank during refueling.

Primary Flag - Indicates the primary fuel product for the unit. Only one product can be the primary product.

Assignment Type

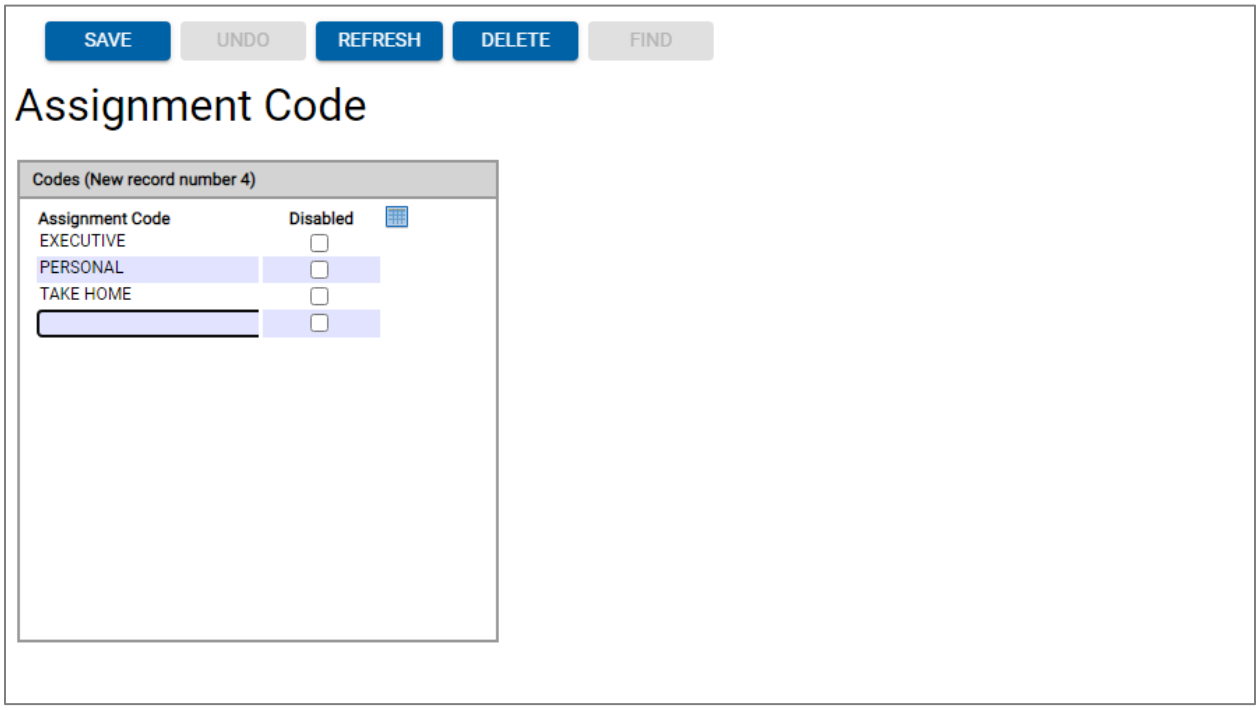
Module(s): Asset Management



The Assignment Type frame is another code frame that is user-defined and can be used to further define Unit Operator Assignments. The Unit Operator Assignment frame is accessed by using the Operator Assignment Query frame. If System Flag 2081 is set to 'Y', Assignment Type codes will be required on Unit Operator Assignments.

Assignment Codes

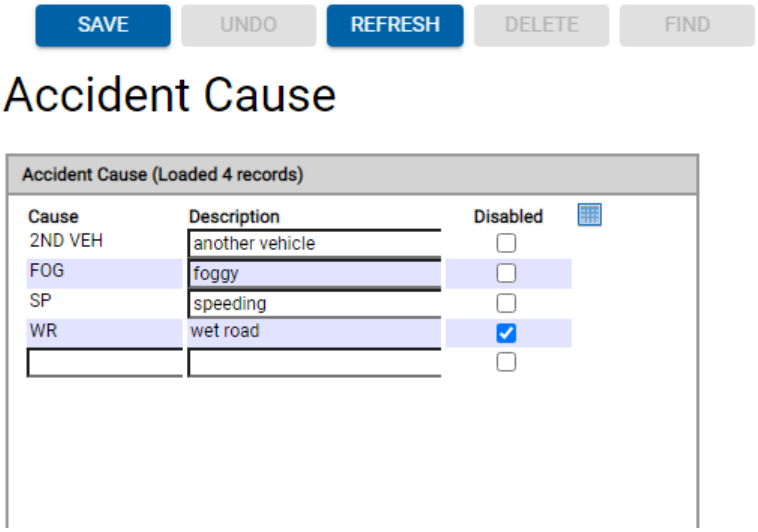
Module(s): Asset Management



The Assignment Code frame allows you to create and maintain a list of user-defined codes to further define Unit Operator Assignments. If System Flag 2082 is set to 'Y', Assignment Codes will be mandatory on Unit Operator Assignments. The Unit Operator Assignment frame is accessed by using the Operator Assignment Query frame.

Accident Cause

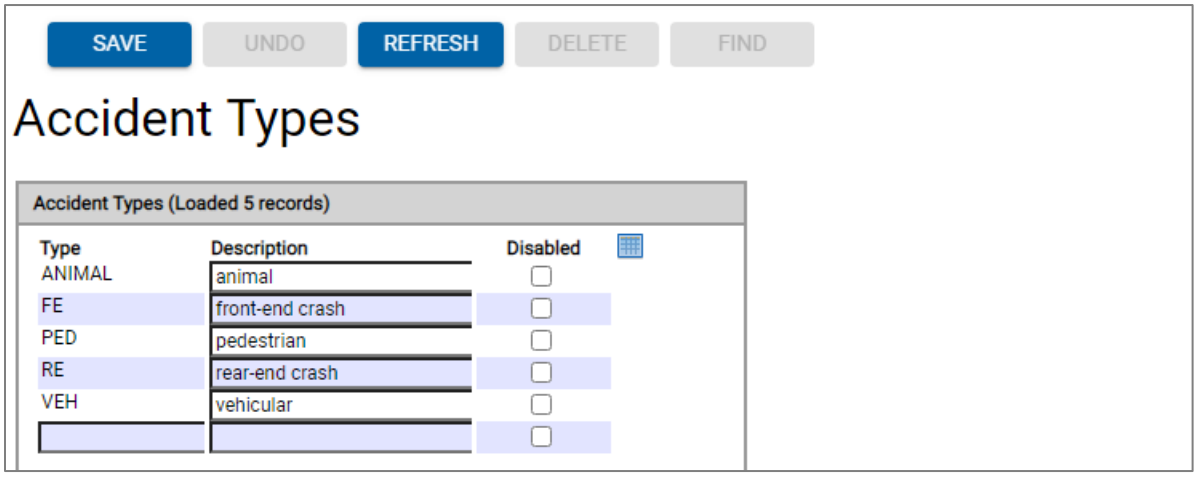
Module(s): Asset Management – Accident Module



The Accident Cause frame allows you to create and maintain a list of Accident Cause codes for use on the Accident Entry frame. These codes identify the cause of an accident when entering accident details on the Accident Entry frame.

Accident Types

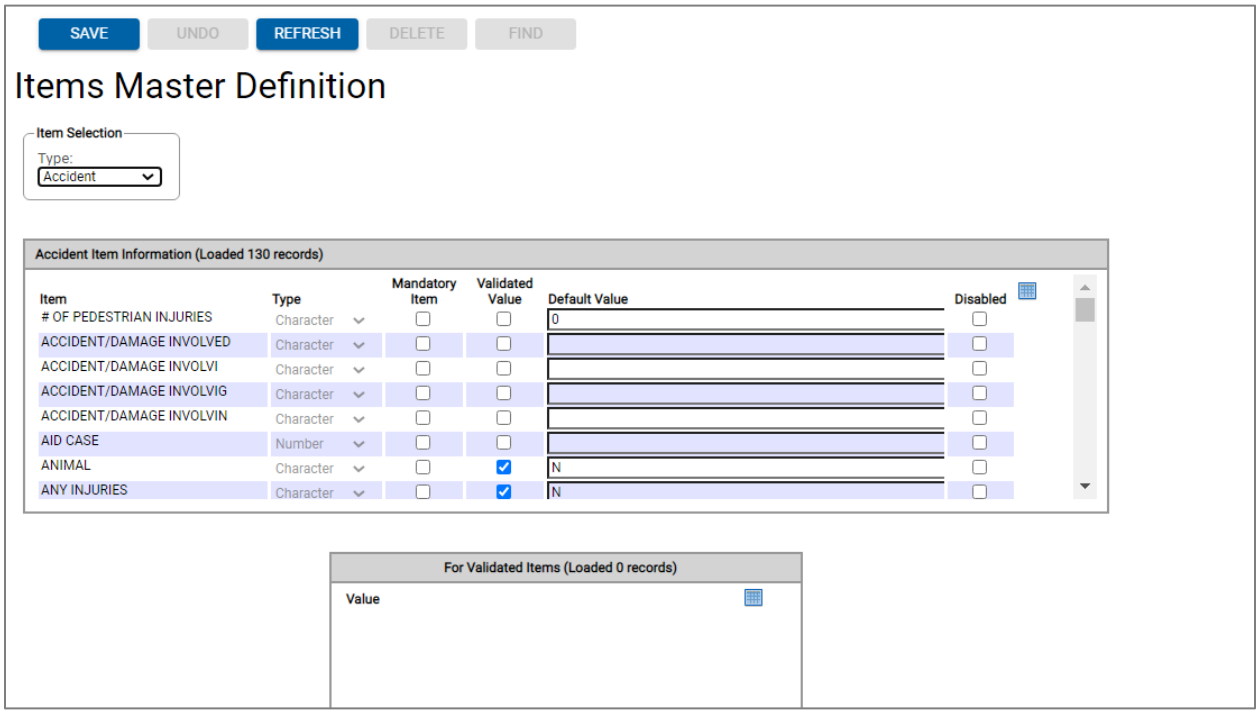
Module(s): Asset Management – Accident Module



The Accident Types frame allows you to create and maintain a list of Accident Type codes for use on the Accident Entry frame. These codes will be used to define the type of accident when entering accident details on the Accident Entry frame.

Accident Items

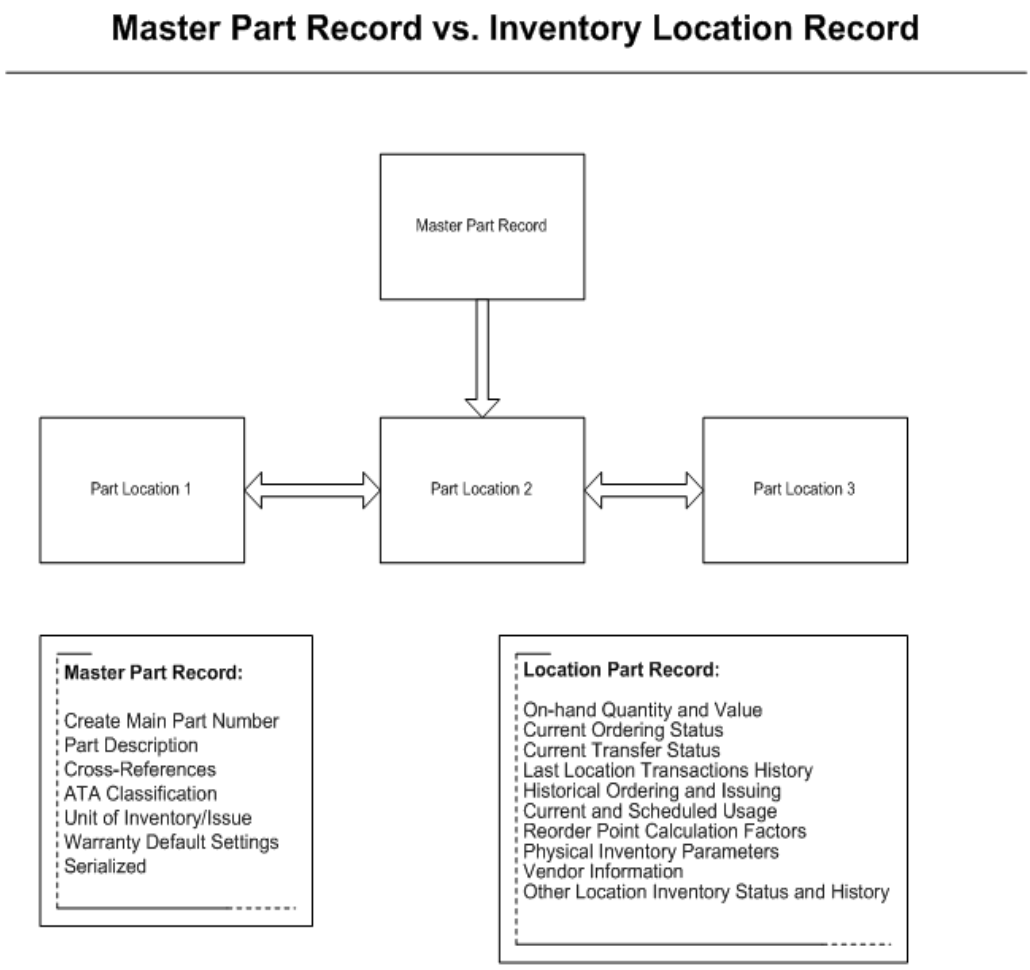
Module(s): Asset Management – Accident Module



After created in the Item Master Definition frame, Accident Items can be added as custom fields to the Accident Entry frame by using the Screen Designer.

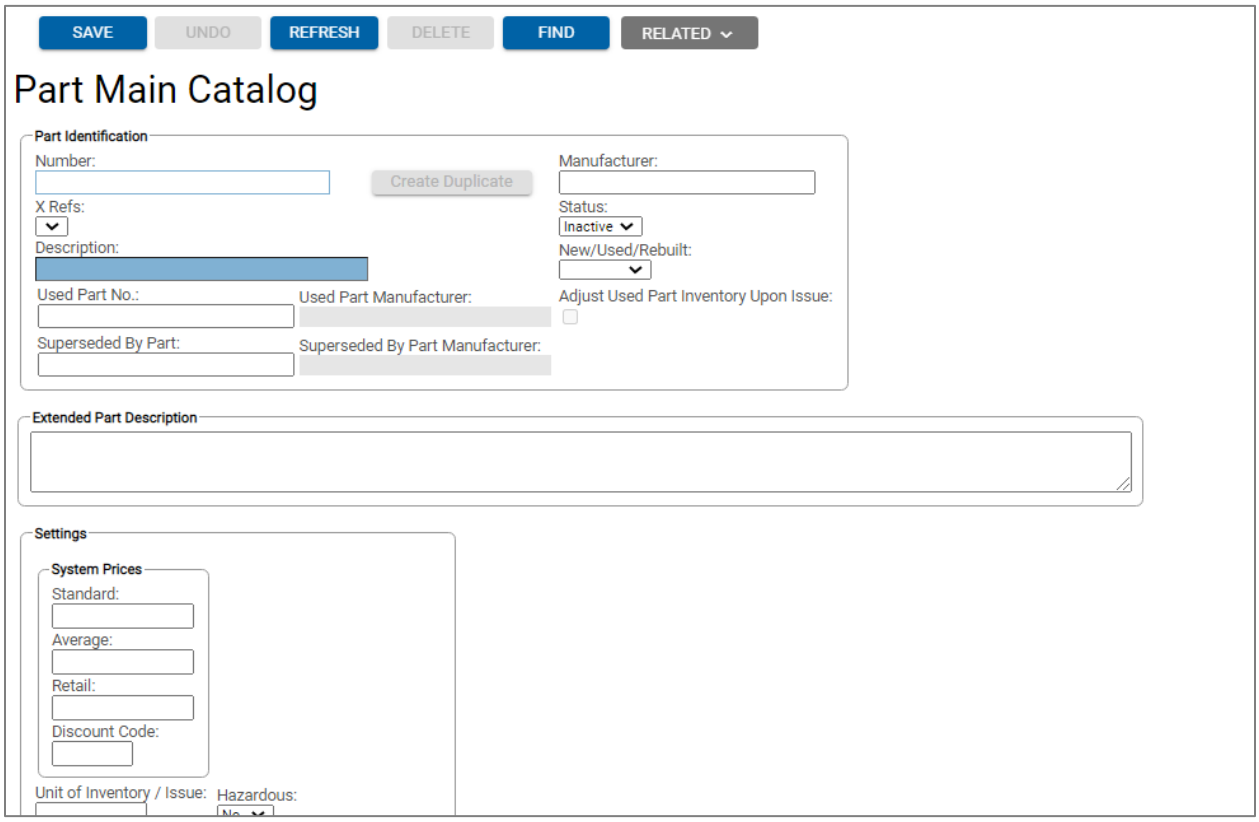
Inventory Management

This is a schematic of the relationship between the master part record in M5 and the location records.



Inventory Classification Frames

Part Main Catalog



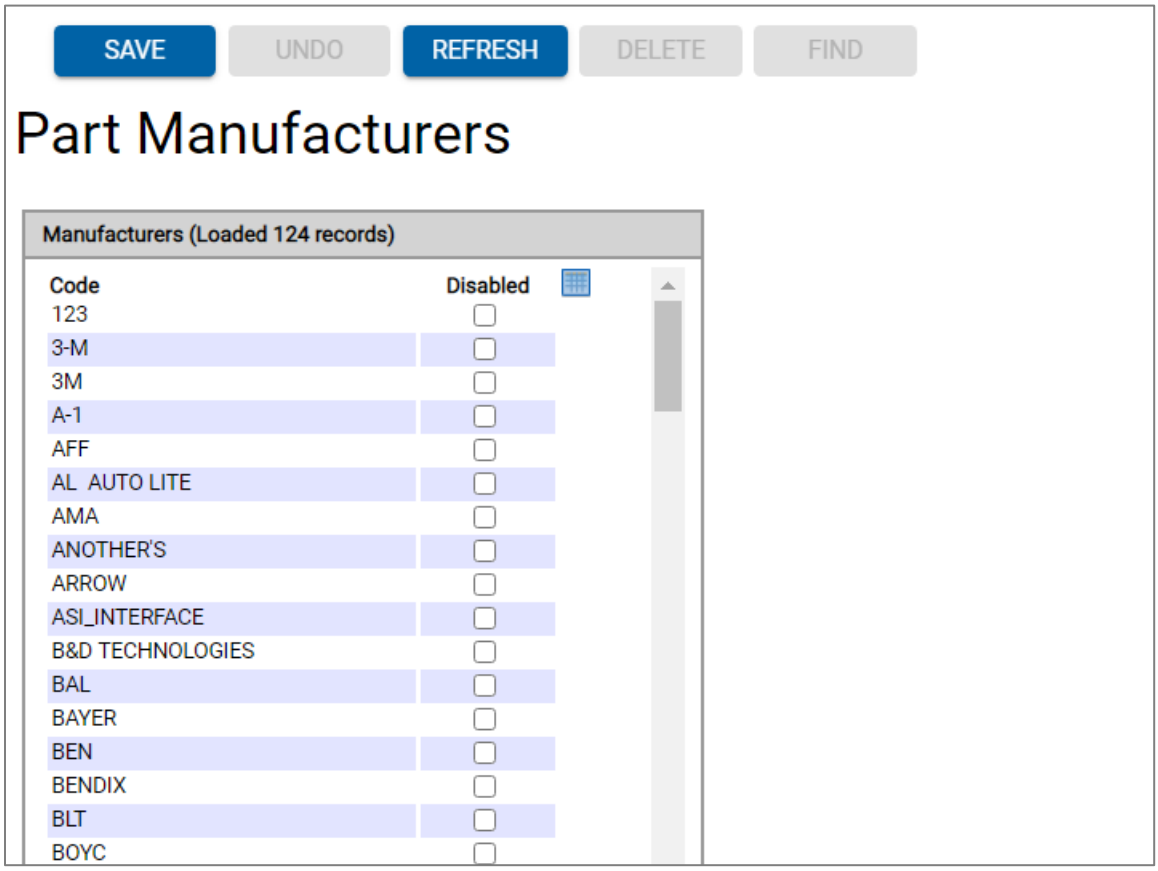
The Part Main Catalog allows you to create and maintain records for all the stock, non-stock, and consignment parts used throughout your fleet organization. The Master Catalog is separate from the actual inventory at each location. You can revise or add to the catalog as needed.

The Part Main Catalog contains definitional information about each part and the Part Inventory Location contains information on what is in stock at each specific inventory location. Before a part can be added to a location on Part Inventory Location Manager (PILM), you must create the record on this frame first.

If System Flag 5210 is "Y", this permits the creation of stock parts at locations only if the part master is deemed stock; a part can be created as non-stock without regard to the part master`s stock or non-stock setting.

Part Manufacturers

Module(s): Inventory Management



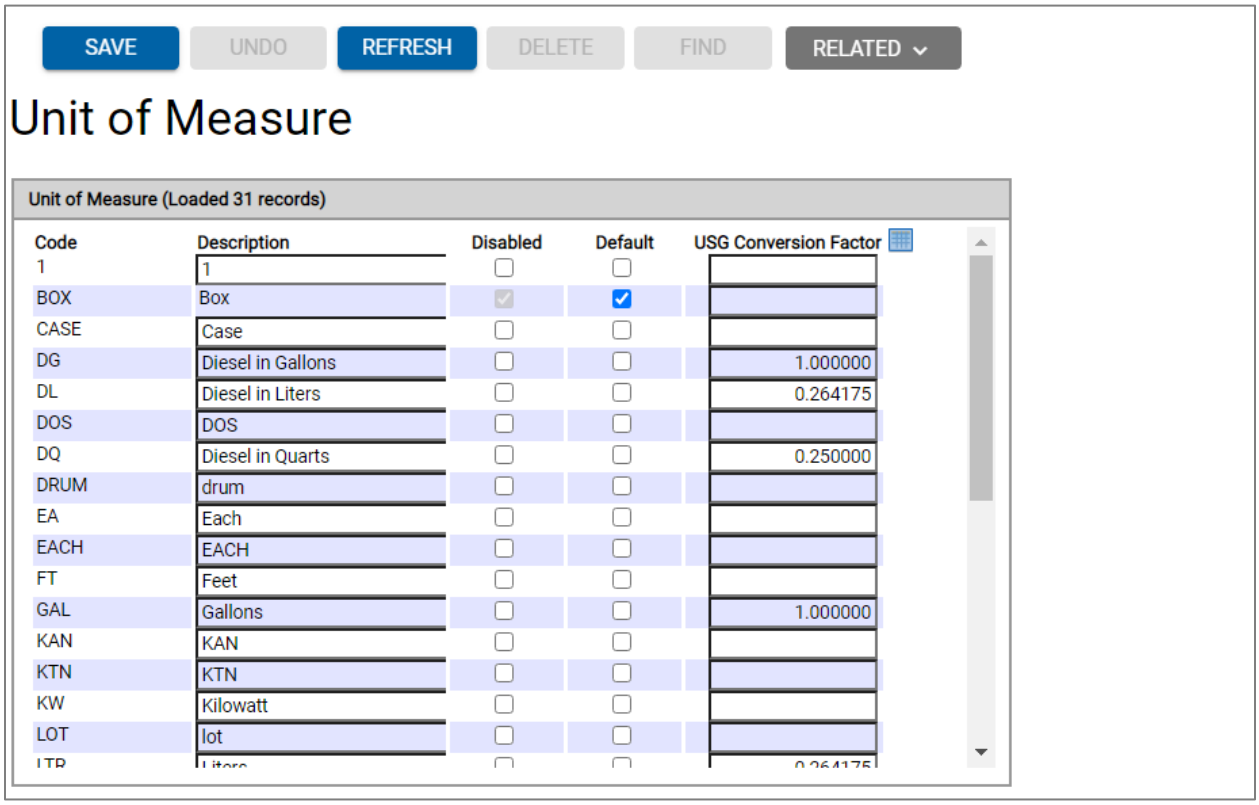
The Part Manufacturers frame allows you to create and maintain a list of codes for use on the Part Main Catalog to indicate the manufacturer of a certain part.

FleetFocus™ M5 allows the user to have the same part number, differentiated by Part Manufacturer, multiple times in the system. For example, oil filters may be purchased from numerous manufacturers but rather than maintaining cross-references and separate numbers, the user can assign just one part number to oil filters and distinguish the number with a Part Manufacturer.

Likewise, two different manufacturers may choose to assign the same number to unlike parts. The system, by using a manufacturer code, allows you to track both parts using the same part number.

Unit of Measure

Module(s): Inventory Management, Asset Management, Fuel Management



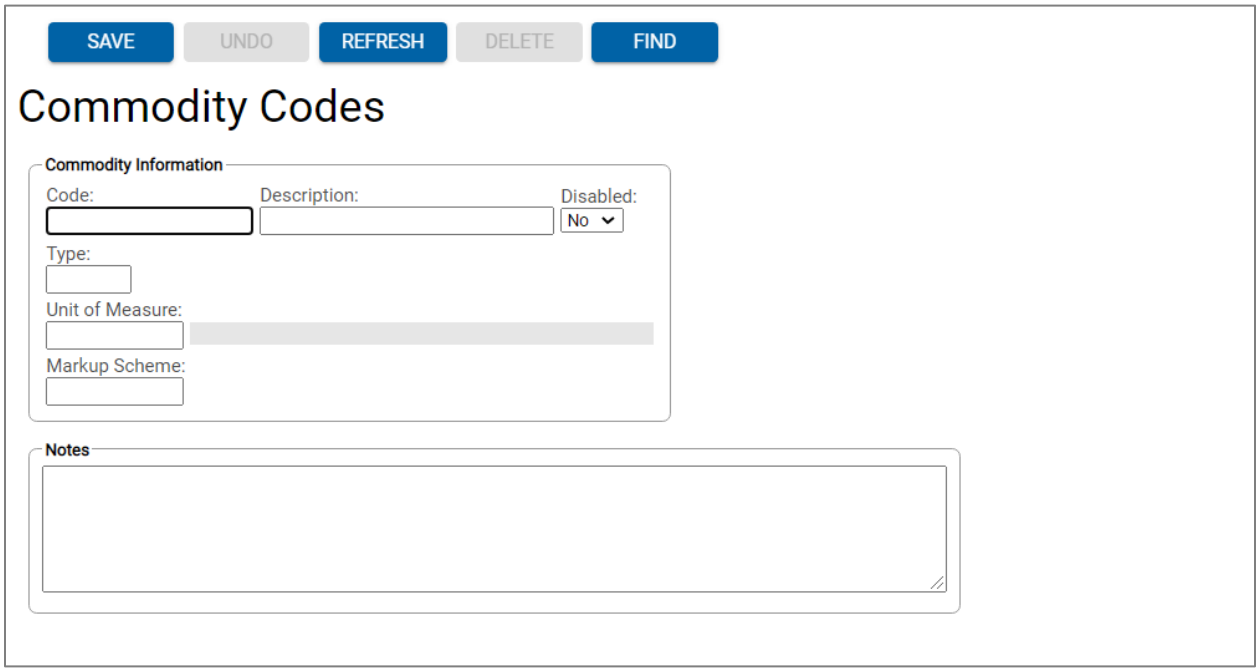
The Unit of Measure frame is where you create and maintain a list of codes to define quantities used for specific measurements of products and parts.

In addition to standard units of measure such as gallons, liters, feet, or meters you have the option to define custom units, such as ‘box’ or ‘bunch’ to meet your organization’s needs.

USG Conversion Factor – This figure will be used by the system to convert any UOM to any other UOM. For example, a UOM of GAL would have a 1 in the new column. A UOM of LIT (or any other name for “liter” of the client’s choosing) and it would have a factor of .264172.

Commodity Codes

Module(s): Inventory Management, Asset Management, Fuel Management



The Commodity Codes frame allows you to create and maintain codes used to group similar parts together for purchasing purposes. Rather than entering a list of individual part numbers on a Purchasing Contract, a single Commodity Code can be used for a vendor.

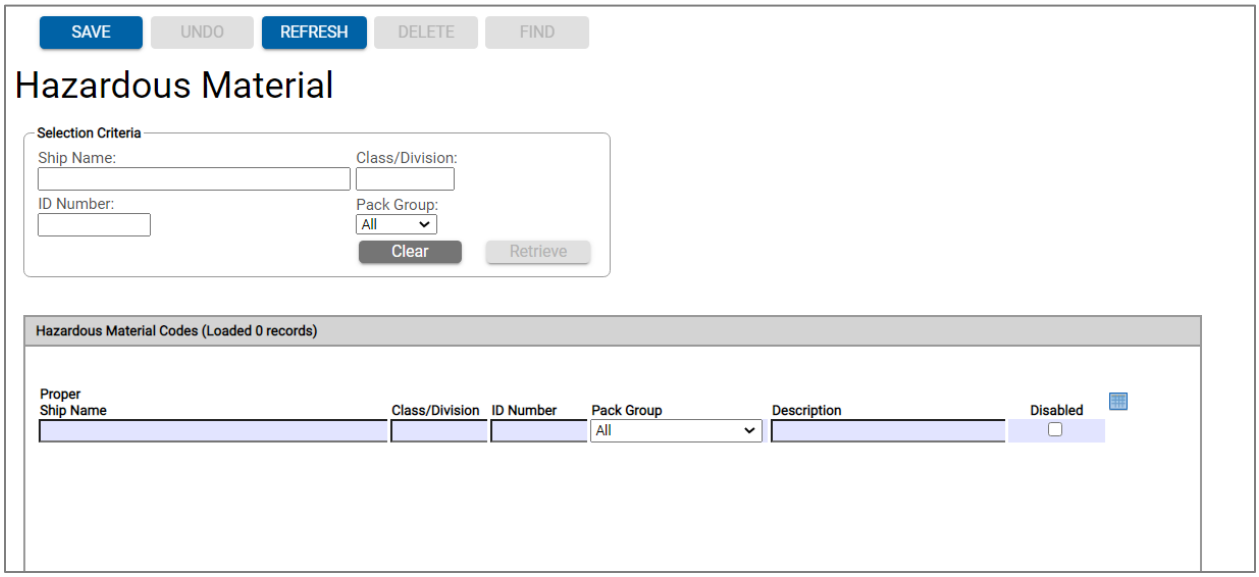
For example, you might want to group all transmission parts together or all brake parts. Commodity Codes can be assigned to part numbers on the Part Main Catalog.

There are several standards that exist for commodity coding such as the National Institute of Government Purchasing (NIGP) coding structure, copyrighted by Periscope Holdings, Inc., that standardizes purchasing for consistency and efficiency in the ordering process. For example, all automotive parts begin with the numbers ‘060’.

A review of the potential use of commodity codes and how to enter them on this frame should be considered.

Hazardous Material

Module(s): Inventory Management



Dangerous goods, also called hazardous materials or HazMats, are solids, liquids, or gases that can harm people, other living organisms, property, or the environment. They are often subject to chemical regulations.

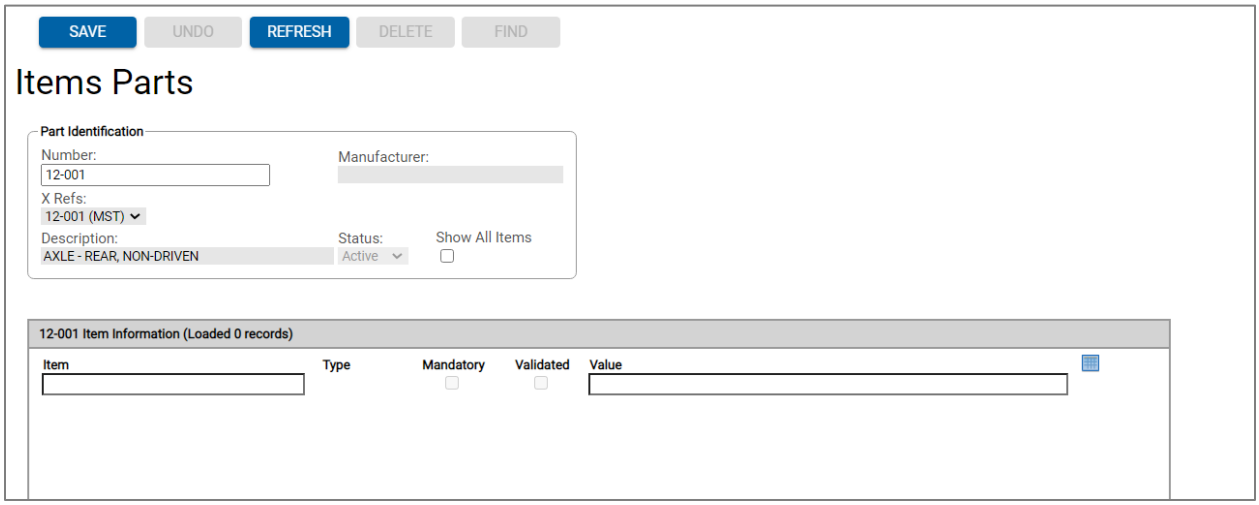
Dangerous goods include materials that are radioactive, flammable, explosive, corrosive, oxidizing, asphyxiating, bio hazardous, toxic, pathogenic, or allergenic.

Also included are physical conditions such as compressed gases and liquids or hot materials, including all goods containing such materials or chemicals, or may have other characteristics that render them hazardous in specific circumstances.

The most widely applied regulatory scheme is that for the transportation of dangerous goods. M5 contains changes to the Part Main part record to store and print comprehensive hazardous material information. Hazardous data fields can now be defined and associated with hazardous parts.

Part Items

Module(s): Inventory Management



The Part Items frame allows you to assign and maintain a list of data items to associate with a part for informational purposes.

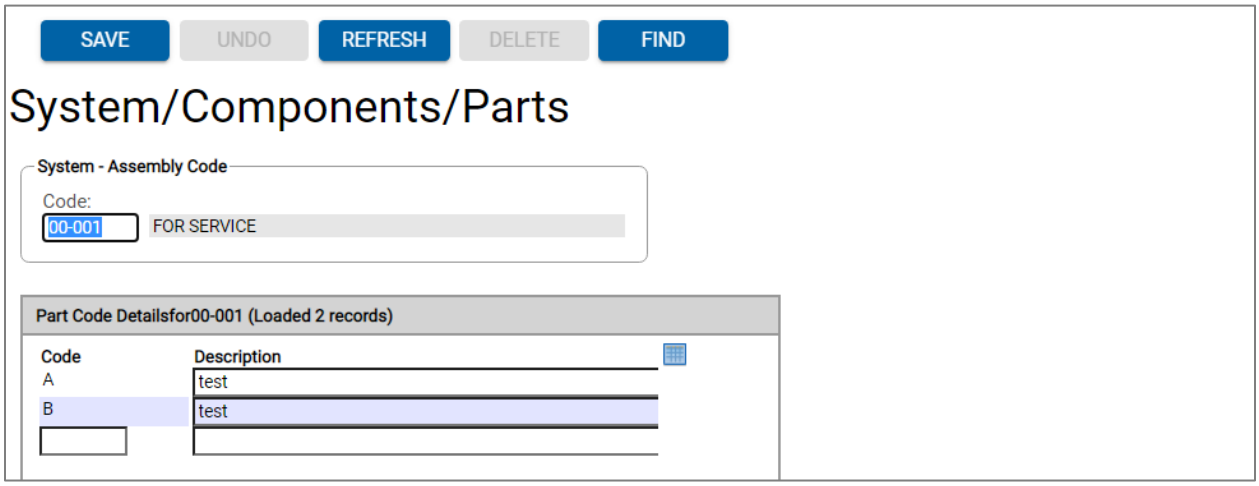
You must first create these data items on the Item Master Definition frame before you can add them here.

The Items that are designated as mandatory on the Item Master Definition frame will automatically load. To view all available items at once, select the **Show All Items** checkbox.

You must setup the Item name, Type, and whether it is ‘Mandatory’ or’ Validated’ on the Item Master Definition frame.

System/Component/Parts

Module(s): Inventory Management



This frame is used to maintain associations between specific System/Component Codes and ATA Part Codes. (Not to be confused with Part Numbers.) The purpose of this association is to take this code (13-001-002 or System/Component/Parts codes) and create an ATA cross reference between it and a Master Part Catalog number. For example:

The ATA job code 01-13-001 translates into the following:

- Work Accomplished Code (WAC) 01 = Repair
- System Code 13 = Brake System
- Assembly Code 001 = Front Disc Brakes

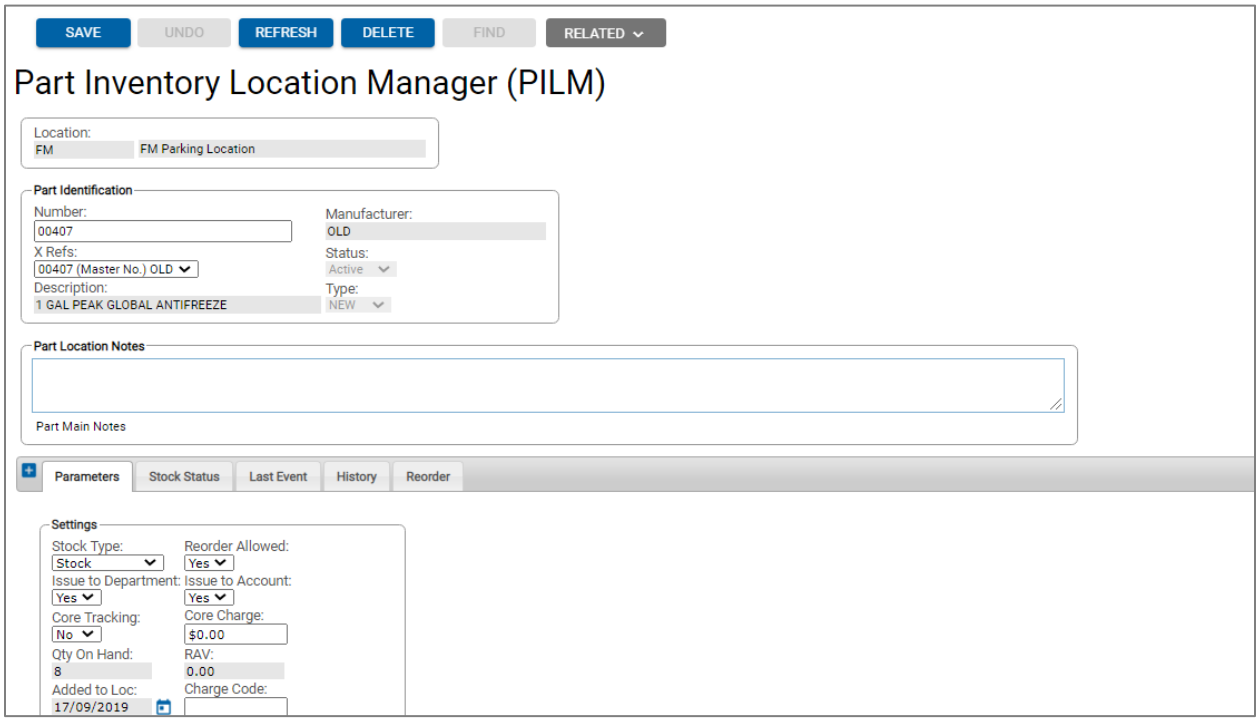
The job calls for the front disc brakes to be repaired. Specific parts can be cross-referenced to this task by associating a Part Code to the System/Component Code and then taking that Part Code and placing it on the Master Part Catalog number.

The System/Component/Parts Code frame allows the user to create this association and attach this code to a part number in the Master Part Catalog that will then generate an ATA cross-reference. These associations will also generate a pop-up displaying the option of the ATA cross-referenced part number when charging a part to that job.

These associations are valuable to users who track inventory based on the jobs performed.

Part Inventory Location Manager

Module(s): Inventory Management, Workflow Management



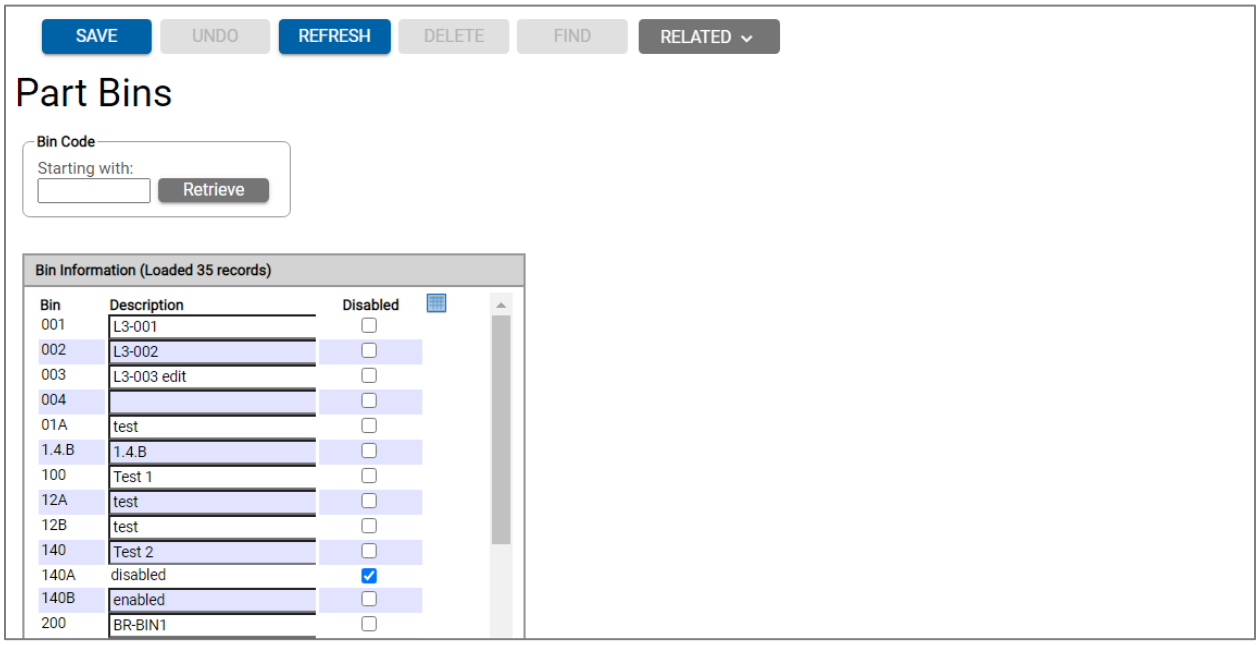
The Part Inventory Location Manager (PILM) frame allows you to define location specific information for parts that exist in the Part Main Catalog. The Part Main Catalog contains the general information for all part records at all locations. Part Inventory Location Manager contains the information that is specific for a given part at a given inventory location.

The PILM record has information such as stock quantities, on-order quantities, and quantities in transit as well as pricing methods, bin locations, transaction histories, vendor reordering information and more. When you receive parts into inventory, you are updating the record at the inventory location.

After you create a part record in the Part Main Catalog, you must go to the Part Inventory Location Manager and add that part to the desired inventory location. **Note:** You must be logged in at the location to which you want to add the part. The location on the Part Inventory Location Manager frame will default to your current location.

Part Bins

Module(s): Inventory Management, Asset Management



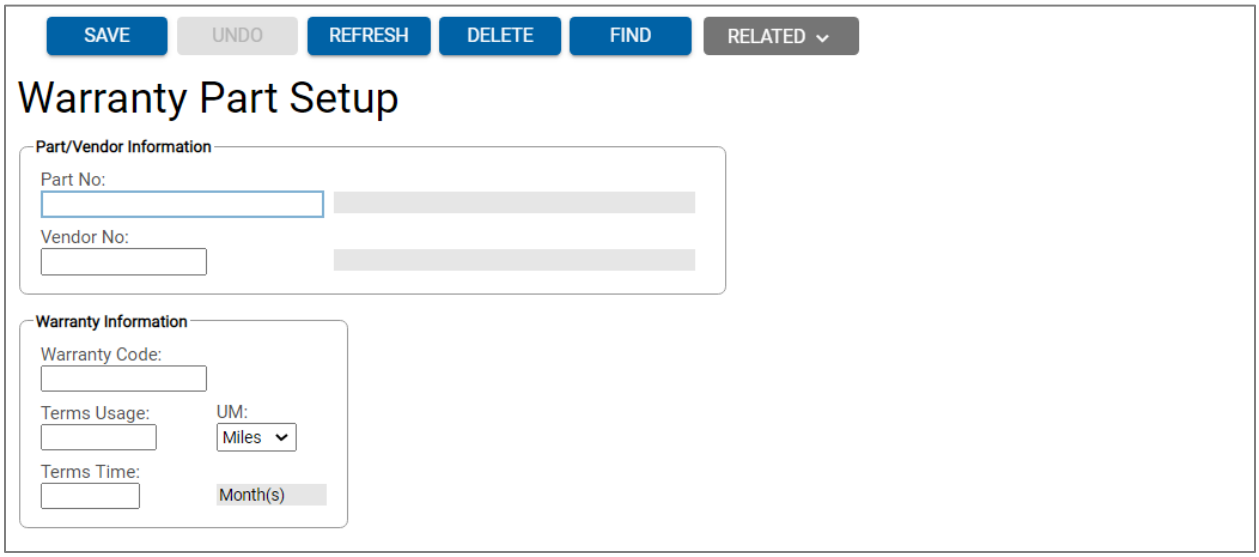
The Part Bins frame is used to create and maintain a list of codes to identify the physical location of where a stock part can be found at a particular inventory location.

For example, the code could identify a row, shelf, box or tray. These part bins can be entered on the Part Inventory Location Manager. Part Bins can also be used as a method for conducting a Physical Inventory Count.

System Flag 5033 controls whether or not part bins are required as well as whether or not they are validated.

Warranty Part Setup

Module(s): Inventory Management, Workflow Management

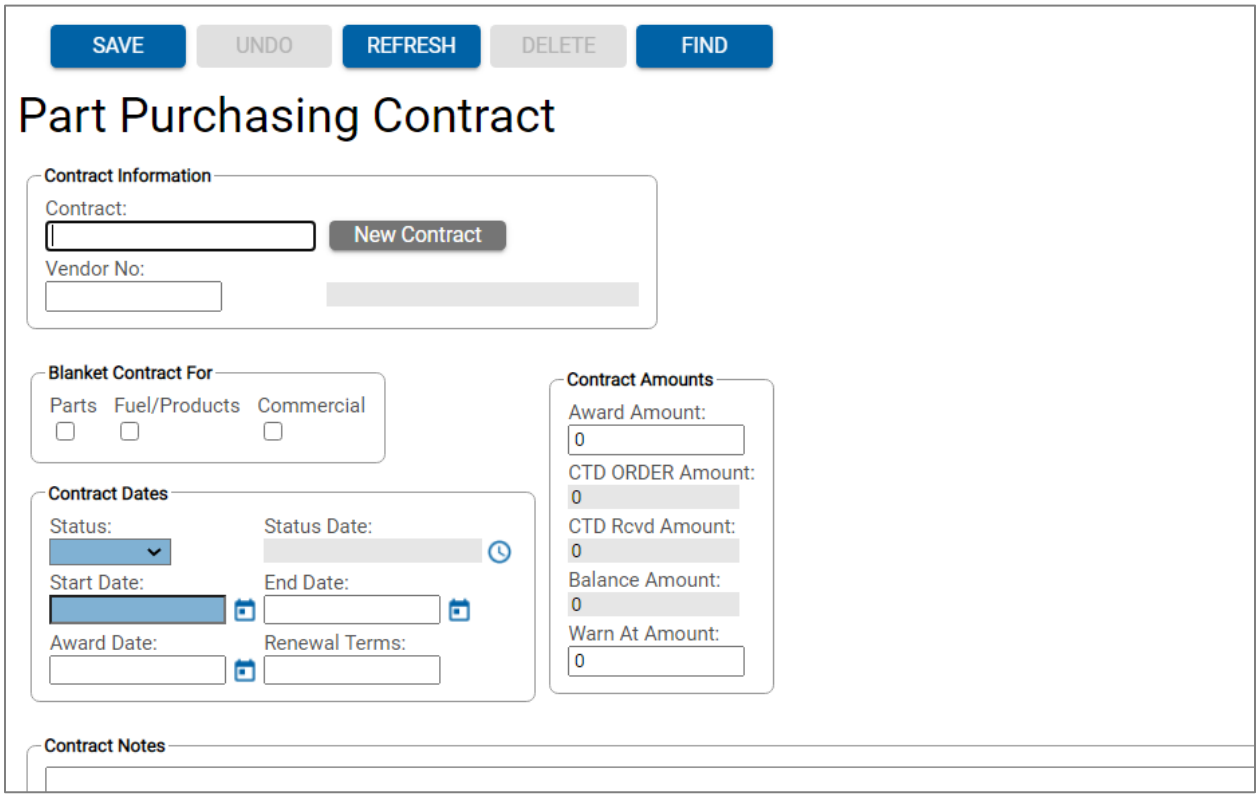


The Warranty Part Setup frame allows you to define warranty terms for a specific part. This frame can be called as a menu item, but is typically accessed by setting the Warranty flag to 'Yes', on the Part Main Catalog for a particular part.

If you access the frame by using a menu, you will receive an error message when entering a part that does not have the flag set to 'Yes' on Part Main.

Purchasing Contracts

Module(s): Inventory Management, Fuel Management, Workflow Management



Purchasing Contracts can be established for: Part(s), Fuel or Commercial Repairs. They can be:

- Blanket (Open PO)
- Commodity
- Specific Part Number

Contract lines may be for commodities which is a purchasing grouping and means that any part whose commodity on the Part Master Record matches the contract line's commodity can be ordered off the contract.

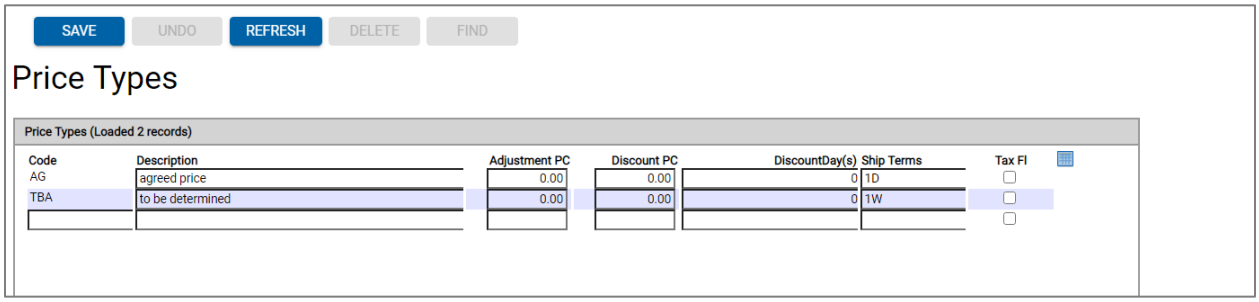
Part contracts can also be set up by specific part number however this is not a popular method as it is labor intensive. The commodity method is helpful for those customers who purchase broad categories of parts from a particular vendor and need to ensure that spending does not exceed a preset limit for the vendor.

Commodity contract lines have no price or quantity, and the unit of order is optional. Contract may have contract items.

Refer to the *M5 System Administration* section for more information. The configuration of vendors is described in the *M5 General Use Code* section.

Price Types

Module(s): Inventory Management

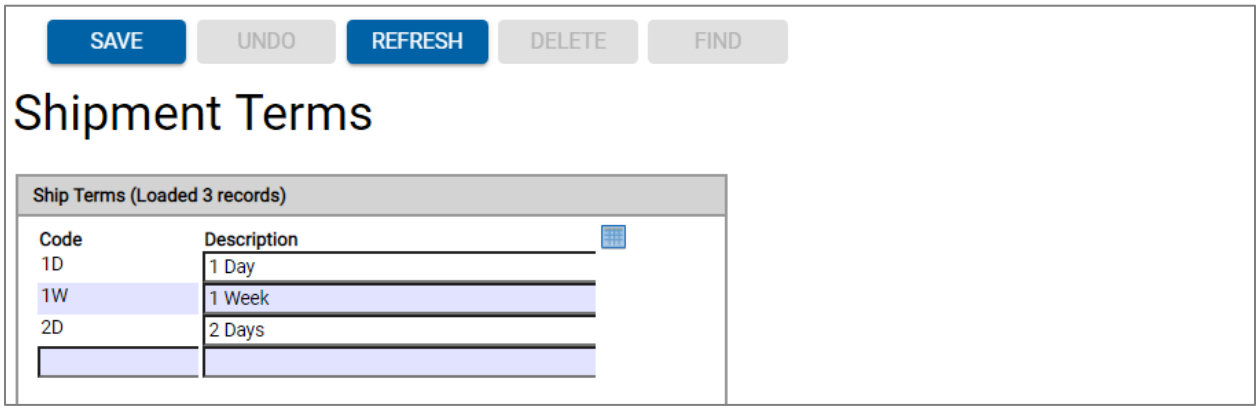


Price Types are user-defined codes used to define different pricing schemes for use on Purchasing Contracts. This frame allows you to create and maintain a list of those codes.

The Adjustment Percentage, Discount Percentage, and Discount Days fields are optional. Values entered here will be applied when this Price Type is associated with a Purchasing Contract. Ship Terms is a required field. The Tax FL field is also optional and is not a validated value.

Shipment Terms

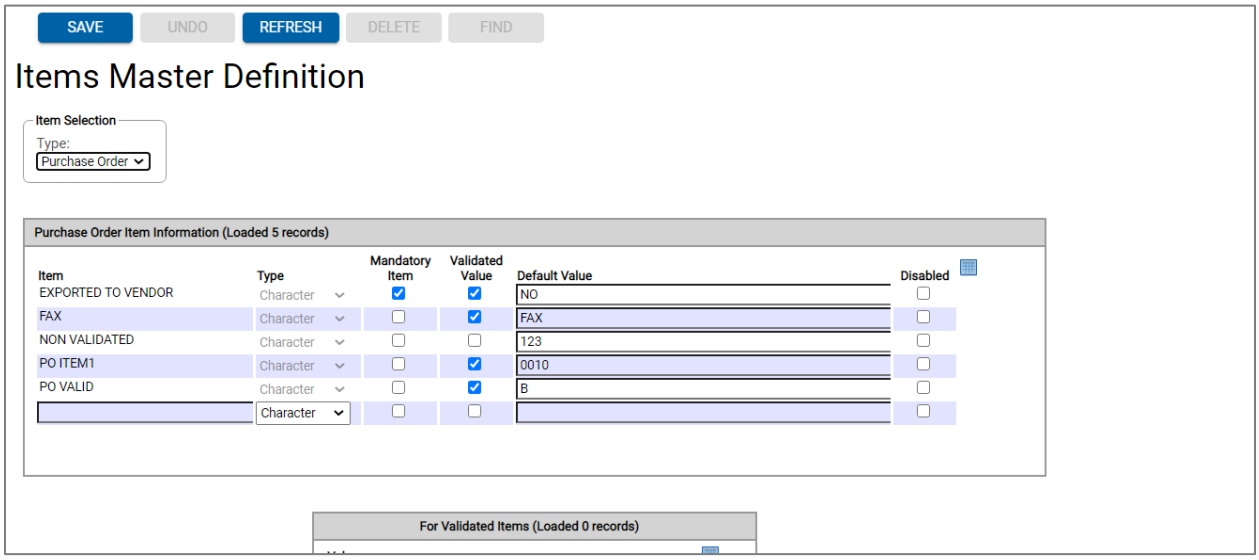
Module(s): Inventory Management



The Shipment Terms frame allows you to create and maintain a list of user-defined codes that can be used to identify the types of delivery services used for parts ordered using Purchasing Contracts. Shipment Terms can also be assigned to Price Types.

Purchase Order Items

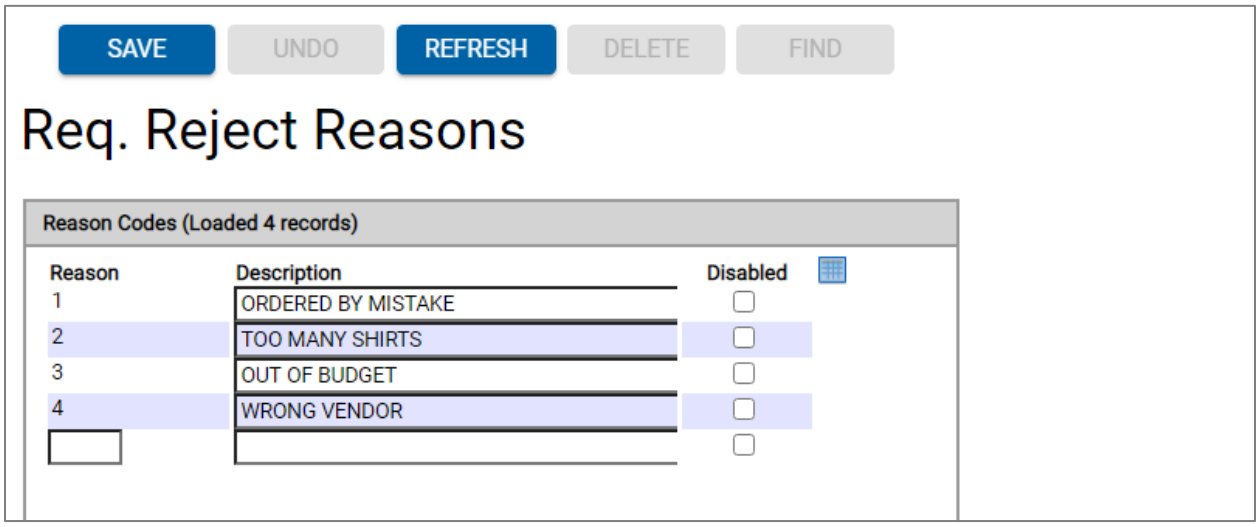
Module(s): Inventory Management



Purchase Order Items can be created on the Item Master Definition frame. After created, these items can be entered on a tab directly on the Purchase Order frame.

Requisition Reject Reasons

Module(s): Asset Management, Inventory Management



This frame allows you to create and maintain a list of Reject Reasons to be used in the Unit Request Process or Part Request Process.

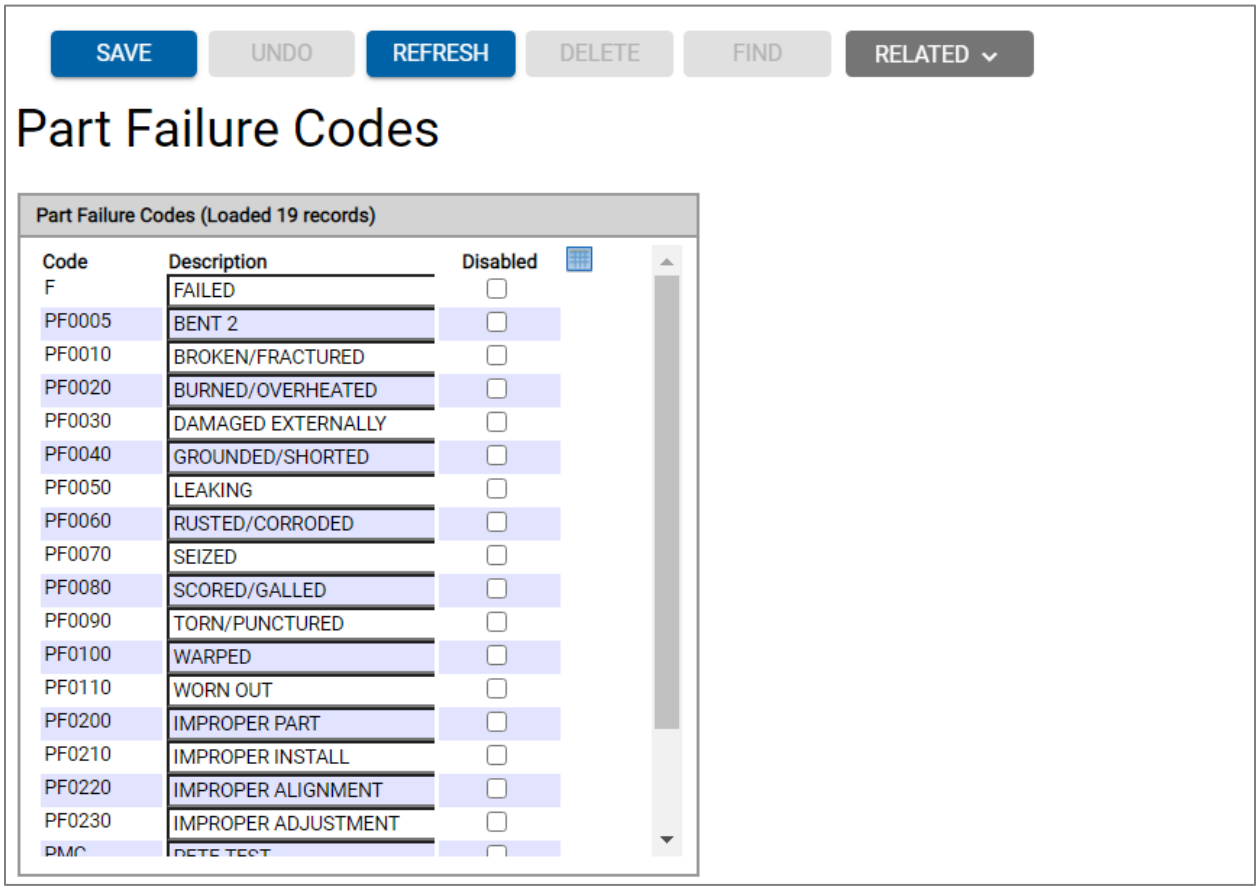
For Unit Requests, the reject reason would be entered on the Unit Request or Unit Request Approve frame. For Part Requests, these reject reasons would be used on the Purchasing Requisition frame.

In some organizations, a person requests parts and then a buyer applies an approval or rejection. If you intend to use requisitioning for the purchasing function and expect them to be rejected you will need to develop a set of rejection codes in this frame.

Note: If System Flag 5192 is set to 'Y', you will be required to enter one of these reason codes when rejecting a Unit Request.

Part Failure Codes

Module(s): Inventory Management, Workflow Management



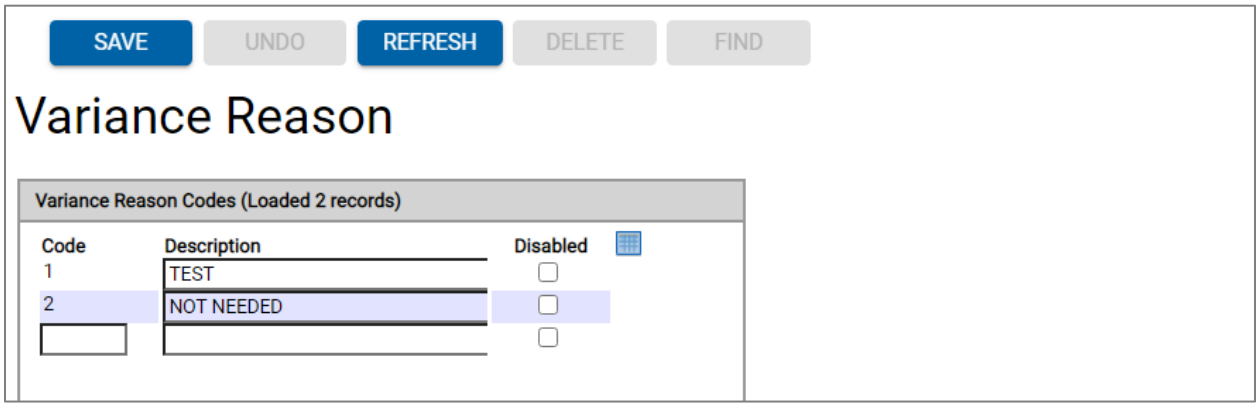
Part Failure Codes can be used on a part issue to identify how or why a previous part that was installed failed or malfunctioned. To implement this functionality on Work Order Main, System Flag 5015 must be set to 'Y."

The use of these codes is optional; they are preloaded in M5. You may wish to track why parts are being replaced during a corrective action on a unit. Again, it is up to you to add, delete, modify any or all of these codes as may be appropriate for your business plan. System Flag 1321 controls whether part failure codes are required when parts are issued.

Failure	Code Description
PF0005	BENT
PF0010	BROKEN/FRACTURED
PF0020	BURNED/OVERHEATED
PF0030	DAMAGED EXTERNALLY
PF0040	GROUNDED/SHORTED
PF0050	LEAKING
PF0060	RUSTED/CORRODED
PF0070	SEIZED
PF0080	SCORED/GALLED
PF0090	TORN/PUNCTURED
PF0100	WARPED
PF0230	IMPROPER ADJUSTMENT
PF0110	WORN
PF0200	IMPROPER PART
PF0220	IMPROPER ALIGNMENT
PF0210	IMPROPER INSTALL

Variance Reason

Module(s): Inventory Management, Asset Management (Component Rebuild Module)

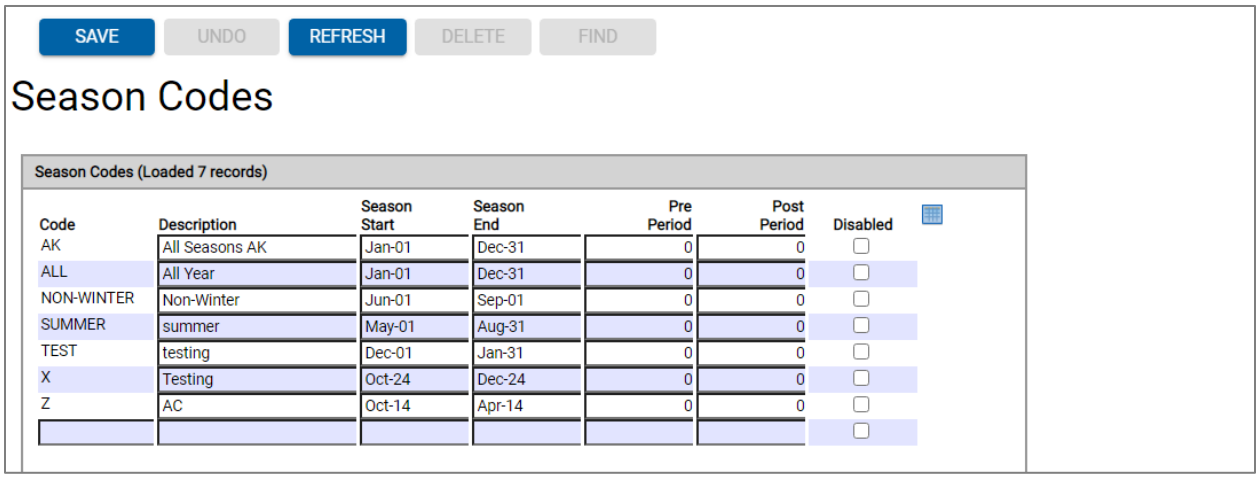


The Variance Reason frame allows you to create and maintain a list of codes to be used in the Component Rebuild Process.

The variance reason code is required when the quantity of fabricated parts being received into inventory is not equal to the quantity of fabricated parts being requested at the time of the work order completion process when the Job Reason code is marked with a Component Rebuild designation.

Season Codes

Module(s): Asset Management, Inventory Management, Workflow Management

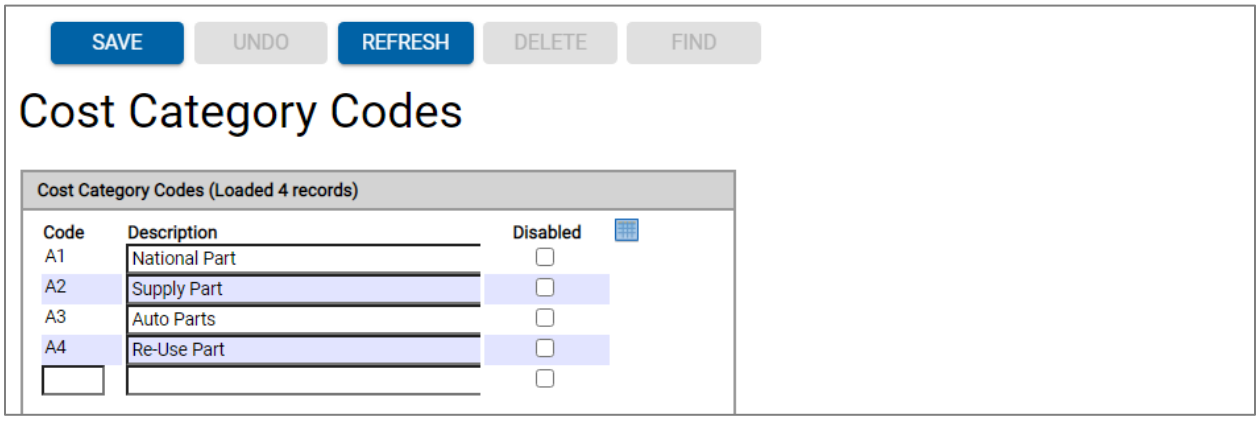


This frame allows you to create and maintain a list of Season Codes. These are optional codes can be used to assist in the reordering of parts and scheduling and forecasting maintenance for units.

Season Codes can be entered on the MCC Main, Activity Codes, Part Main Catalog, and Part Inventory Location Manager frames.

Cost Category Codes

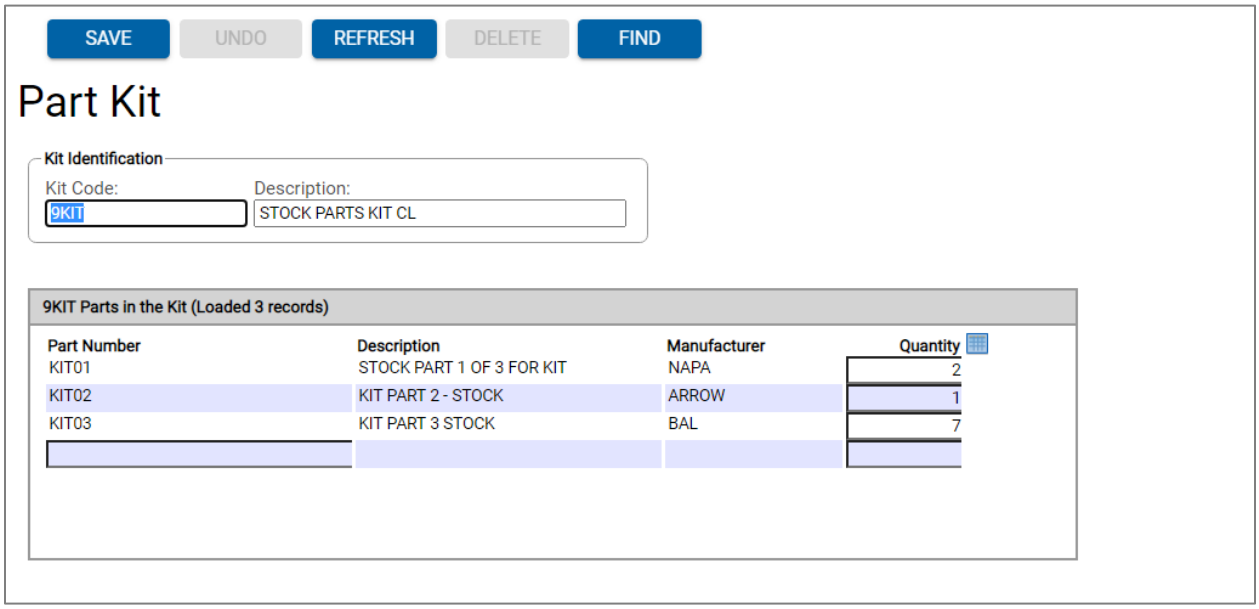
Module(s): Inventory Management



The cost category codes frame allows the user to create a user defined code stored at the Inventory Level to be used within the Supply Distribution frame.

Part Kits

Module(s): Inventory Management



The Park Kits frame allows you to create a set of parts from existing stock parts that are commonly used together for a job. This Part Kit can simplify the inventory management steps involved and ensure that you consistently have the same parts available for the recurring jobs.

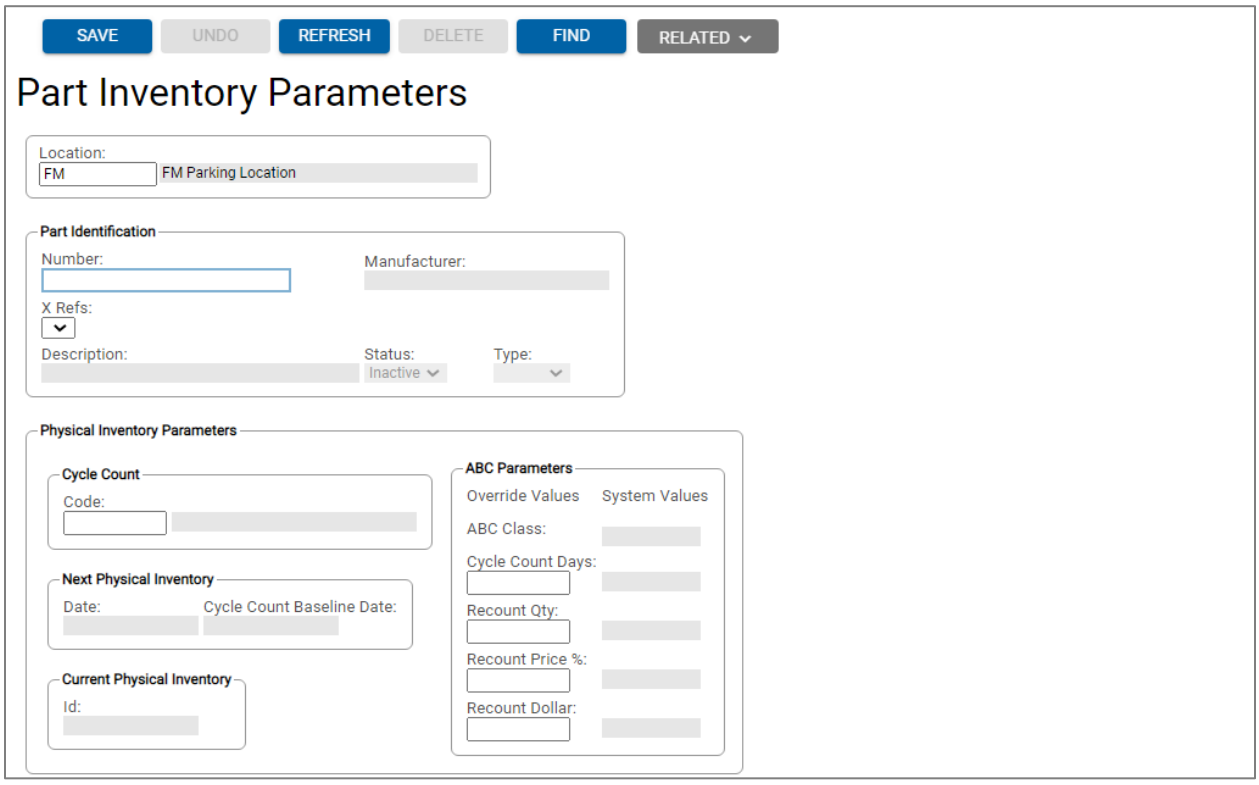
To ease the issue and transfer of parts, a group of parts called a “kit” can be created. These kits “expand” into their list of included parts during the issue or transfer, and from then on are considered individual part line items.

Part Kits do not allows for serial or lotted numbers and the code must be a unique identification code and cannot be a part number already in use in your Part Main Catalog.

Physical Inventory Setup

Part Inventory Parameters

Module(s): Inventory Management



The Part Inventory Parameters frame allows you to view and modify the Physical Inventory parameters for a particular part. These parameters determine how parts are counted during a physical inventory.

To view or modify the parameters for a specific part, start by entering the inventory location of the part in the Location field at the top of the frame.

Physical Inventory Parameters

Cycle Count - A Cycle Count is one method for collecting physical inventory counts. Cycle Count Codes determine how often a physical inventory count is performed on a specific part. Enter a code or double-click in the field to select one from the list of values (LOV).
Next Physical Inventory Date - Date of the next scheduled physical inventory, read-only.
Cycle Count Baseline Date - Used as the baseline to schedule future counts.

Current Physical Inventory ID - If the part is currently part of an existing Physical Inventory, that ID will display in this field.

ABC Parameters

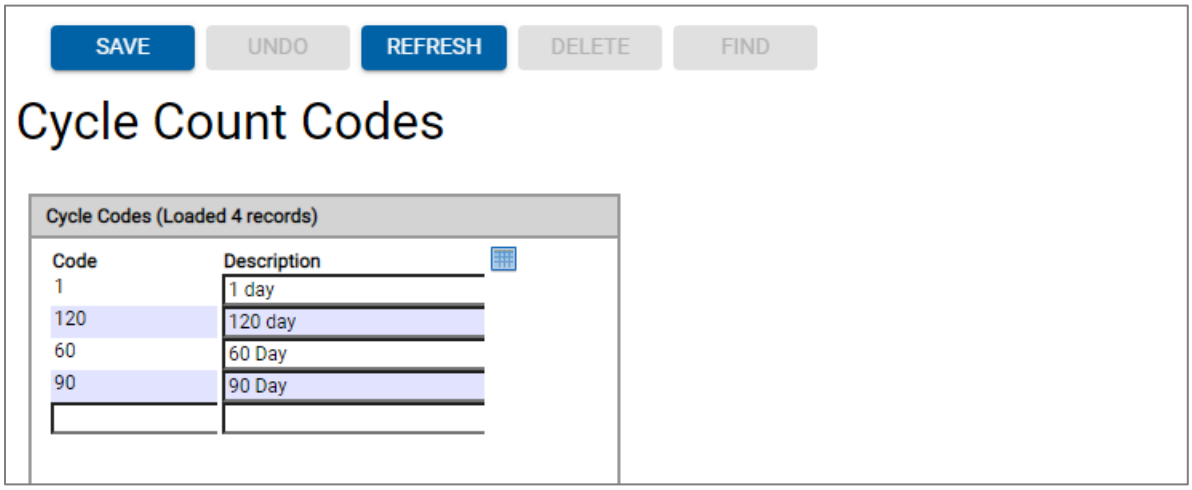
ABC Class codes are user-defined inventory movement codes assigned to stock parts used to indicate slow, medium, and fast moving parts for the purpose of reordering those parts, specifically this pertains to ‘automatic’ reordering.

If you are using the ‘manual’ reordering option, ABC Class Codes will not need to be setup unless you want to use them to help control Physical Inventory Counting.

The System Values will automatically display if the part has valid ABC Class Code assigned on the Part Inventory Location Manager frame (Reorder tab). You can enter Override Values if necessary.

Cycle Count Codes

Module(s): Inventory Management



Cycle Count Codes are used to determine how often a physical inventory count is performed on a particular part. A physical inventory count helps the user reconcile the difference between what is actually in inventory and what the computer shows as being in inventory.

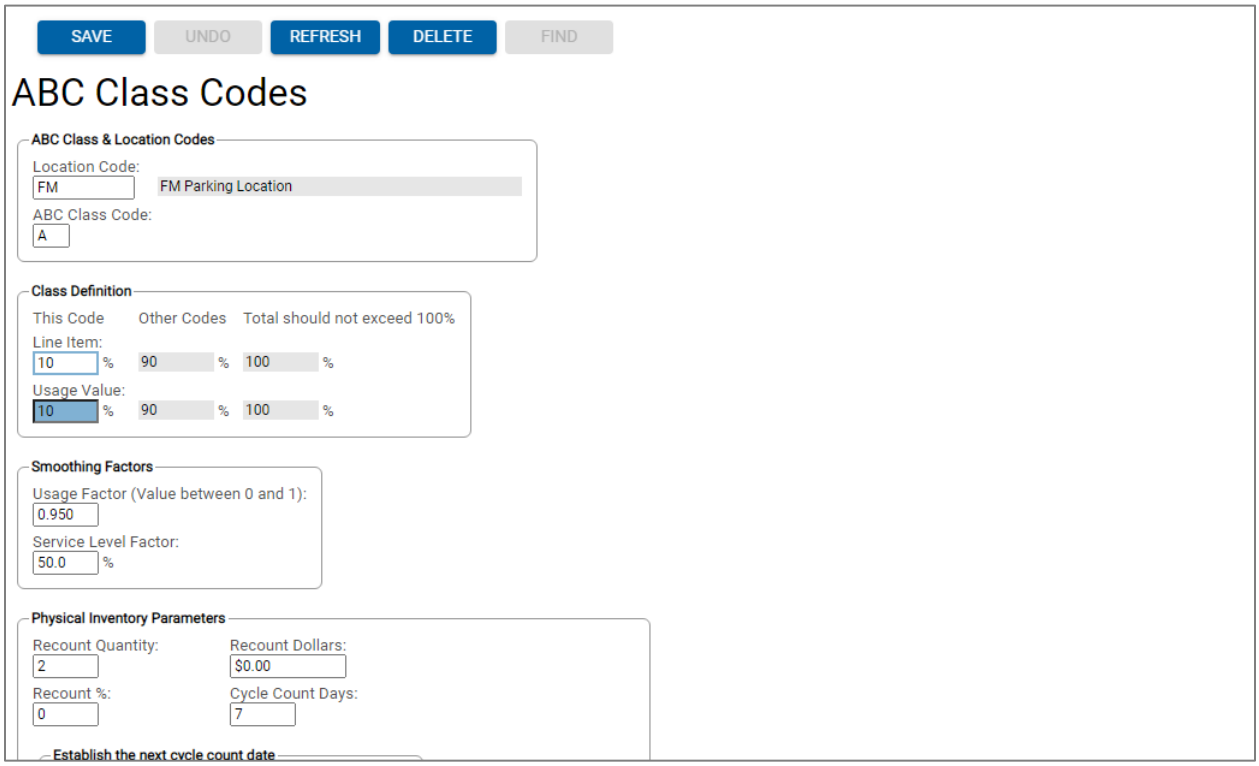
A Cycle Count is one method of collecting physical inventory counts. These codes can be created and maintained on this frame.

After these codes are set up, they must be manually assigned to each part on the Part Inventory Parameters frame in the Physical Inventory Parameters sections.

If cycle codes have not been established previously, this is an opportunity to decide whether or not to use them after implementing FleetFocus™ M5 in order to assist with maintaining accurate inventory valuations.

ABC Class Codes

Module(s): Inventory Management



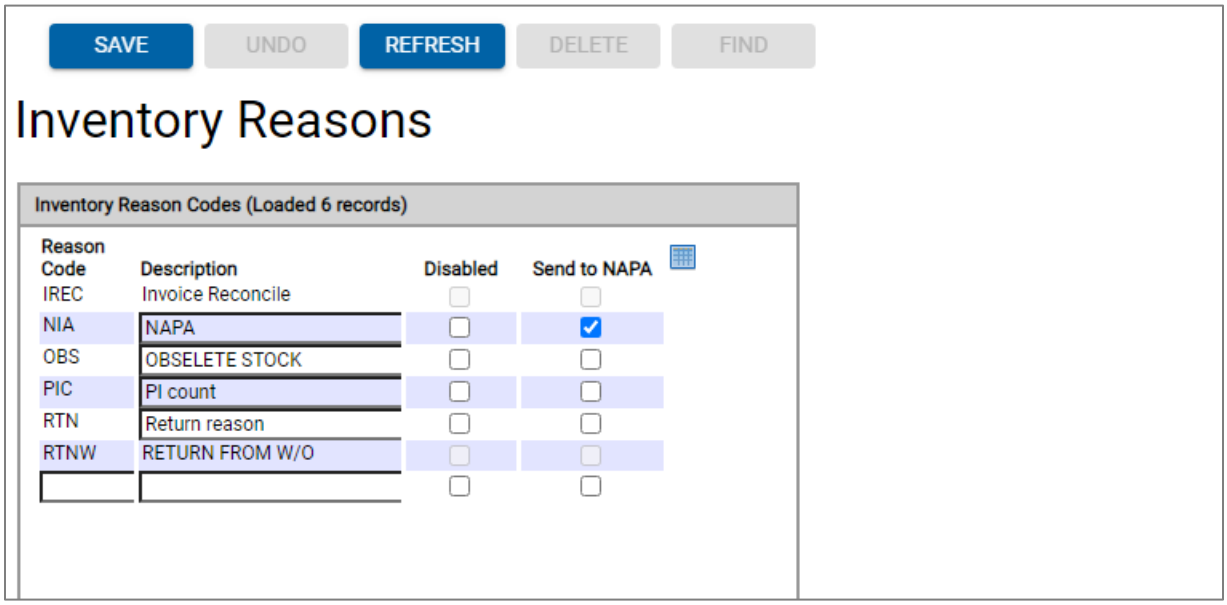
ABC Class codes are user-defined inventory movement codes assigned to stock parts used to indicate slow, medium, and fast moving parts for the purpose of reordering those parts, specifically this pertains to ‘automatic’ reordering. If you are using the ‘manual’ reordering option, ABC Class Codes will not need to be setup unless you want to use them to help control Physical Inventory Counting.

ABC Class Codes are setup at the inventory location level, meaning each location designated as an inventory location will have its own set of ABC Class Codes.

M5 supports up to 36 ABC Class Codes, but for the purposes of this example, we will use just three: A, B, and C.

Inventory Adjustment Reasons

Module(s): Inventory Management



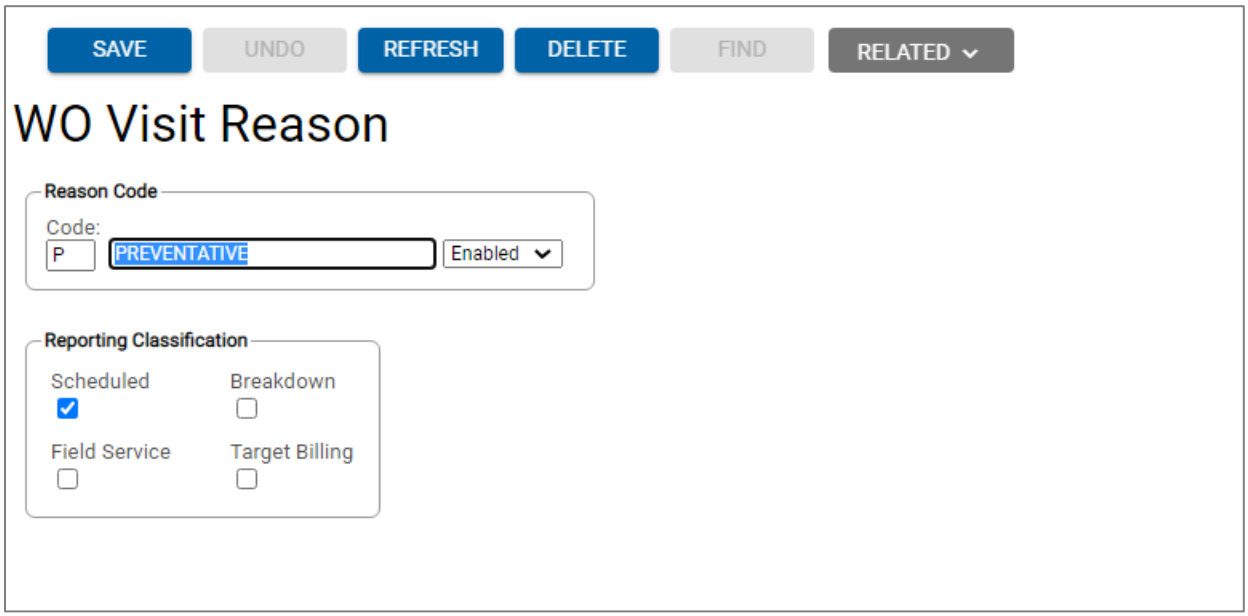
Inventory Adjustment Reason Codes can be used to indicate why inventory was adjusted. It may be when a part was returned into stock or to a vendor or when making adjustments to inventory quantity and price.

Take the opportunity to review reasons why part adjustments might be made and establish the appropriate codes in this frame.

Work Order Management

Work Order Visit Reasons

Module(s): Workflow Management



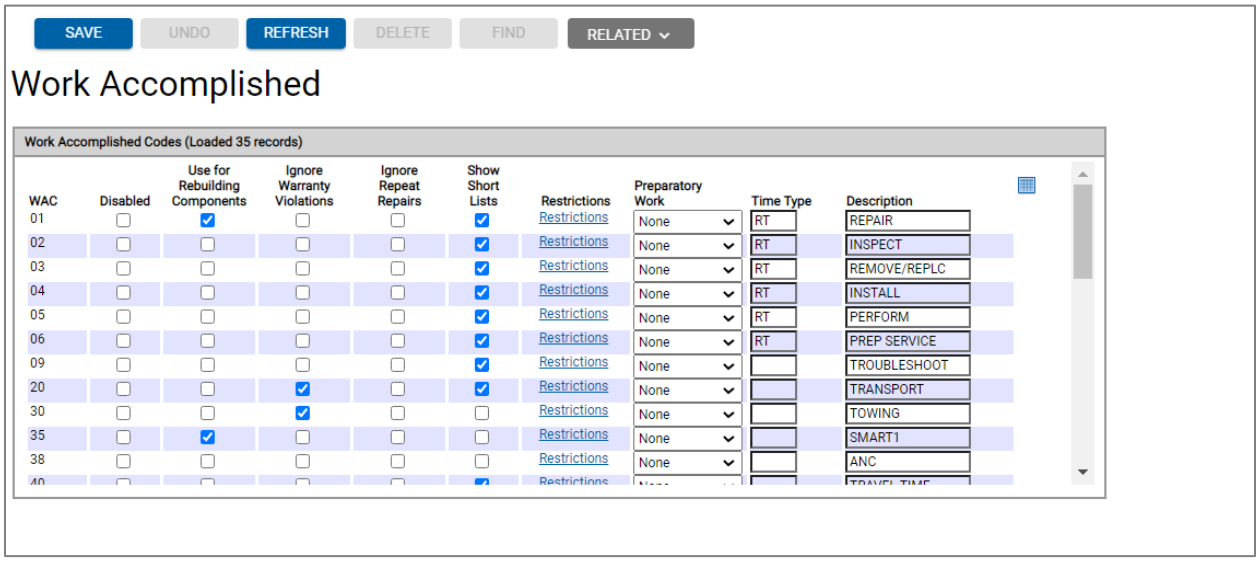
Work Order Visit Reasons identify the primary cause or reason for opening a work order. It is sometimes referred to as a 'Downtime Visit Reason' since the unit is in a downtime status during repairs. These reasons are entered on Work Order Main.

The visit reasons are used for reporting purposes. It is important for many organizations to track things like planned vs. unplanned work to help better allocate resources to serve their needs in the most efficient way possible.

This is a good time to decide how many valid Work Order Visit Reasons to have for FleetFocus™ M5 since this code is only used to describe the reason for starting downtime.

Work Accomplished Codes

Module(s): Workflow Management



Work Accomplished Codes are the 'action' codes of the job. These codes indicate the action performed by the technician such as repair, replace, or inspect. Although there are industry standards for these codes, FleetFocus™ M5 gives users the ability to define their own WACs to comply with company policy and procedures.

Each WAC code can be given the authority to be used for Rebuilding Components, Ignoring Warranty Violations, Ignoring Repeat Repairs or used to accumulate Acquisition or Disposal Prep charges. Short Lists is used for the Direct Invoice Entry frame to designate which WAC codes will be displayed. For example, if code 03 is selected to be an Acquisition related code, the charges associated with any job with the WAC of 03 will be accumulated towards the unit's Acquisition Prep costs and ultimately the unit's total depreciable value.

The user should review all preloaded codes, deciding which to use and set the appropriate flags for warranty, acquisition or disposal actions as well as disable any codes which will not be used in FleetFocus™ M5. The preloaded work accomplished codes are listed on the following page.

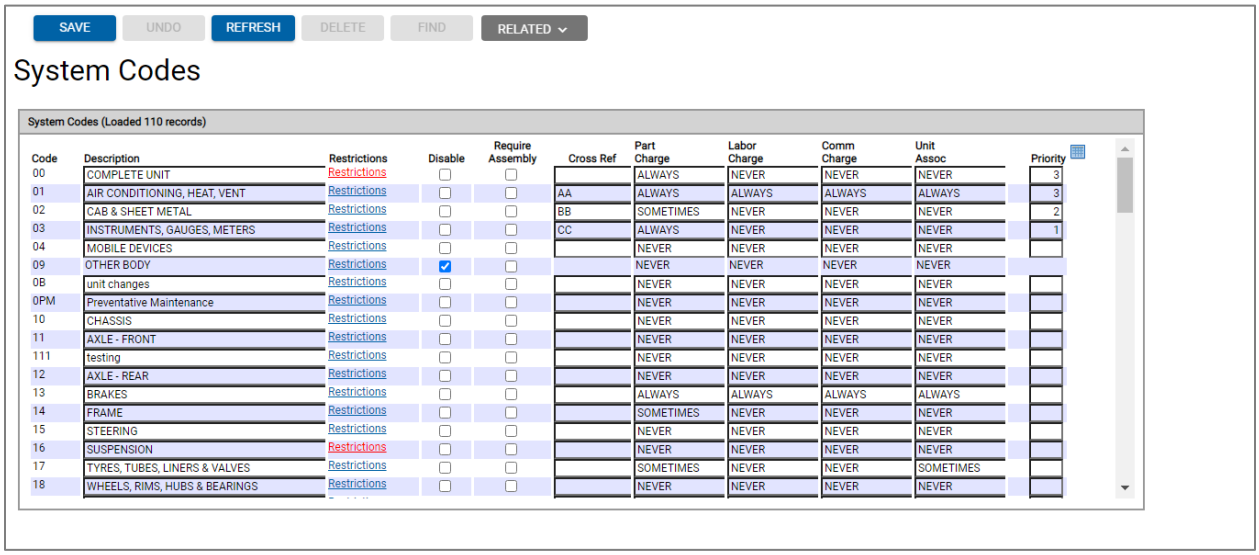
Work Accomplished Codes (WAC)

WAC	Description	Rebuild ?	Ignore Warranty?	Prep Work?
01	ADJUST	N	N	A
02	ALIGN	N	N	N
03	ASSEMBLE	Y	N	N
04	BALANCE	N	N	N
05	BLEED	N	N	N
06	BRAND	N	N	N
07	CALIBRATE	N	N	N
08	CHARGE	N	N	N
09	CHECK	N	N	D
10	CLEAN	Y	N	N
11	DIAGNOSE	N	N	N
12	DISMOUNT	N	N	N
13	DRAIN	N	N	N
14	DRAIN/FLUSH	N	N	N
15	DRAIN/REFILL	N	N	N
16	FABRICATE	N	N	N
17	FILL	N	N	N
18	FLUSH	N	N	N
19	GRIND	Y	N	N
20	HONE/SURFACE	Y	N	N
21	INSPECT	Y	N	N
22	INSTALL	N	N	N
23	LUBRICATE	N	N	N
24	MODIFY	N	N	N
25	MOUNT	N	N	N
26	PACK	N	N	N
27	PAINT	N	N	N
28	PATCH	N	N	N
29	POLISH	N	N	N
30	PURGE	N	N	N
31	REBUILD	Y	N	N
32	REMOVE/REP	Y	N	N
33	REFILL	N	Y	N
34	REFURBISH	Y	N	N
35	RELINE	N	N	N
36	REMOVE	Y	N	N
37	REPACK	N	Y	N
38	REPAIR	Y	N	N
39	REPLACE	Y	N	N
40	ROAD-TEST	N	Y	N
41	ROTATE	N	Y	N

42	RUST-PROOF	N	Y	N
43	SAND-BLAST	N	Y	N
44	SHARPEN	N	Y	N
45	STEAMCLEAN	N	Y	N
46	STRAIGHTEN	N	N	N
47	TEST	Y	Y	N
48	TIGHTEN	Y	N	N
49	TORQUE	Y	N	N
50	TOW	N	Y	N
51	TROUBLESHOOT	N	N	N
52	TUNE-UP	N	Y	N
53	TURN	Y	N	N
54	UNDERCOAT	N	Y	N
55	WASH	N	Y	N
56	WELD	N	N	N
60	MOVE UNIT	N	Y	N
61	TRAVEL	N	Y	N
70	PERFORM	N	Y	N
90	PREP/SERVICE	N	Y	A
91	PREP/DISPOSE	N	Y	D
92	SPECIAL FEES	N	N	N
99	STEREO INSTALL	Y	Y	N
DI	DISP INSPECT	N	Y	D
JW	CRUSH	N	Y	D
NI	NEW INSPECT	N	Y	A
PM	PM	N	Y	N

System Codes

Module(s): Asset Management (Components), Inventory Management, Workflow Management



Code	Description	Restrictions	Disable	Require Assembly	Cross Ref	Part Charge	Labor Charge	Comm Charge	Unit Assoc	Priority
00	COMPLETE UNIT	Restrictions	☐	☐		ALWAYS	NEVER	NEVER	NEVER	3
01	AIR CONDITIONING, HEAT, VENT	Restrictions	☐	☐	AA	ALWAYS	ALWAYS	ALWAYS	ALWAYS	3
02	CAB & SHEET METAL	Restrictions	☐	☐	BB	SOMETIMES	NEVER	NEVER	NEVER	2
03	INSTRUMENTS, GAUGES, METERS	Restrictions	☐	☐	CC	ALWAYS	NEVER	NEVER	NEVER	1
04	MOBILE DEVICES	Restrictions	☐	☐		NEVER	NEVER	NEVER	NEVER	
09	OTHER BODY	Restrictions	☑	☐		NEVER	NEVER	NEVER	NEVER	
0B	unit changes	Restrictions	☐	☐		NEVER	NEVER	NEVER	NEVER	
0PM	Preventative Maintenance	Restrictions	☐	☐		NEVER	NEVER	NEVER	NEVER	
10	CHASSIS	Restrictions	☐	☐		NEVER	NEVER	NEVER	NEVER	
11	AXLE - FRONT	Restrictions	☐	☐		NEVER	NEVER	NEVER	NEVER	
111	testing	Restrictions	☐	☐		NEVER	NEVER	NEVER	NEVER	
12	AXLE - REAR	Restrictions	☐	☐		NEVER	NEVER	NEVER	NEVER	
13	BRAKES	Restrictions	☐	☐		ALWAYS	ALWAYS	ALWAYS	ALWAYS	
14	FRAME	Restrictions	☐	☐		SOMETIMES	NEVER	NEVER	NEVER	
15	STEERING	Restrictions	☐	☐		NEVER	NEVER	NEVER	NEVER	
16	SUSPENSION	Restrictions	☐	☐		NEVER	NEVER	NEVER	NEVER	
17	TYRES, TUBES, LINERS & VALVES	Restrictions	☐	☐		SOMETIMES	NEVER	NEVER	SOMETIMES	
18	WHEELS, RIMS, HUBS & BEARINGS	Restrictions	☐	☐		NEVER	NEVER	NEVER	NEVER	

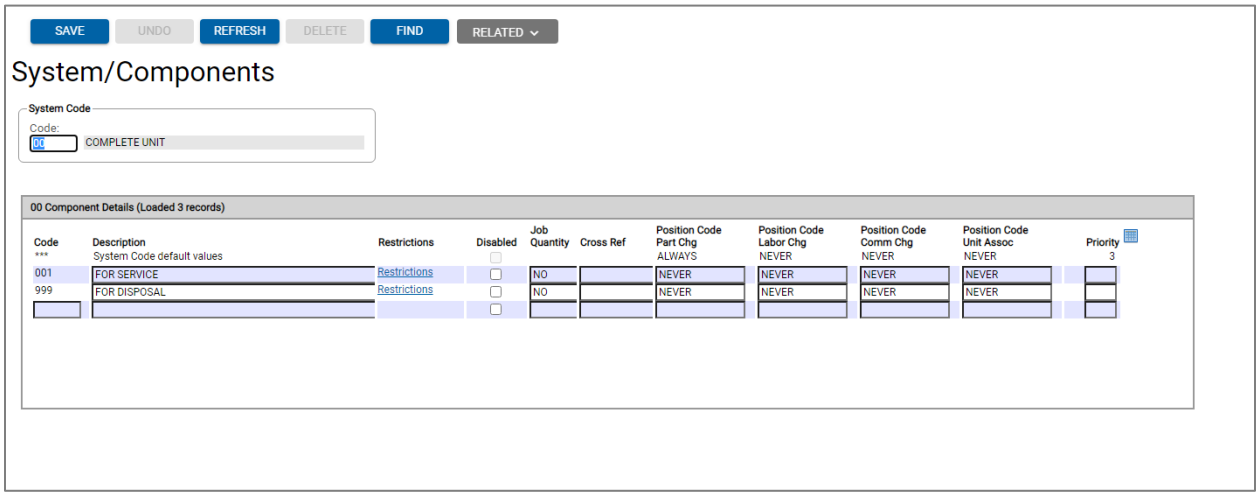
The System Codes frame allows you to create, modify and delete codes for systems. These codes are used elsewhere in FleetFocus™ M5. For instance, job codes, used for standard jobs and work orders, consist of a work-accomplished code, a system code and an assembly.

The Component codes are loaded and maintained in the frame System/Component Codes and Part Codes are loaded and maintained in the System/Component/Parts frame.

In preparation for moving to FleetFocus™ M5, review and adjust, add or disable any of the pre-loaded codes you need to as part of your business decision process.

System/Components

Module(s): Asset Management (Components), Inventory Management, Workflow Management



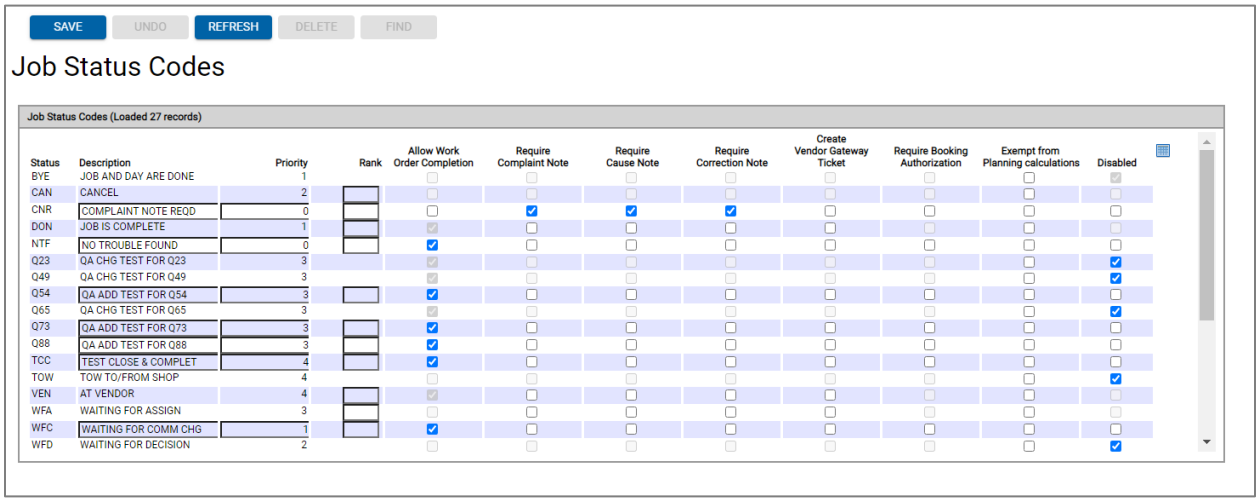
Units are composites of various systems. A vehicle's frame is a system, as are the brakes and air conditioning. Each system is made up of a number of assemblies. For example, a brake system's assemblies may include brake lines, front brakes and drums.

The System/Assembly Codes frame is used to create and maintain a set of codes to identify individual parts commonly grouped together in a system. M5 comes delivered with a set of codes based on the American Trucking Association (ATA) standards.

You can use these codes or design your own codes to better meet the needs of your organization. This frame also gives you the ability to define Position Code requirements when work is being performed on a specific System/Assembly. You can also designate which Position Codes are valid for the System Assembly on the System/Assembly Positions frame.

Job Status Codes

Module(s): Workflow Management



The Job Status Codes frame allows you to create and maintain codes to indicate a job's progress or level of completion on a Work Order.

New codes can be created and defined as needed but M5 includes some hard coded status codes that are required by other modules and cannot be modified.

BYE, CAN, DON, VEN, WFA, WIP, and WR are all grayed out and their descriptions and priorities cannot be changed. Certain flag checkboxes are able to be changed, but others are not. Flags that are cannot be modified will also appear grayed out.

If using real time labor capture, the mechanic would be changing the status while the work is being done. The job status can then be reported to show how much time was spent for instance, waiting for space in the shop, waiting for parts and waiting for a decision as opposed to the actual work in progress or real labor time.

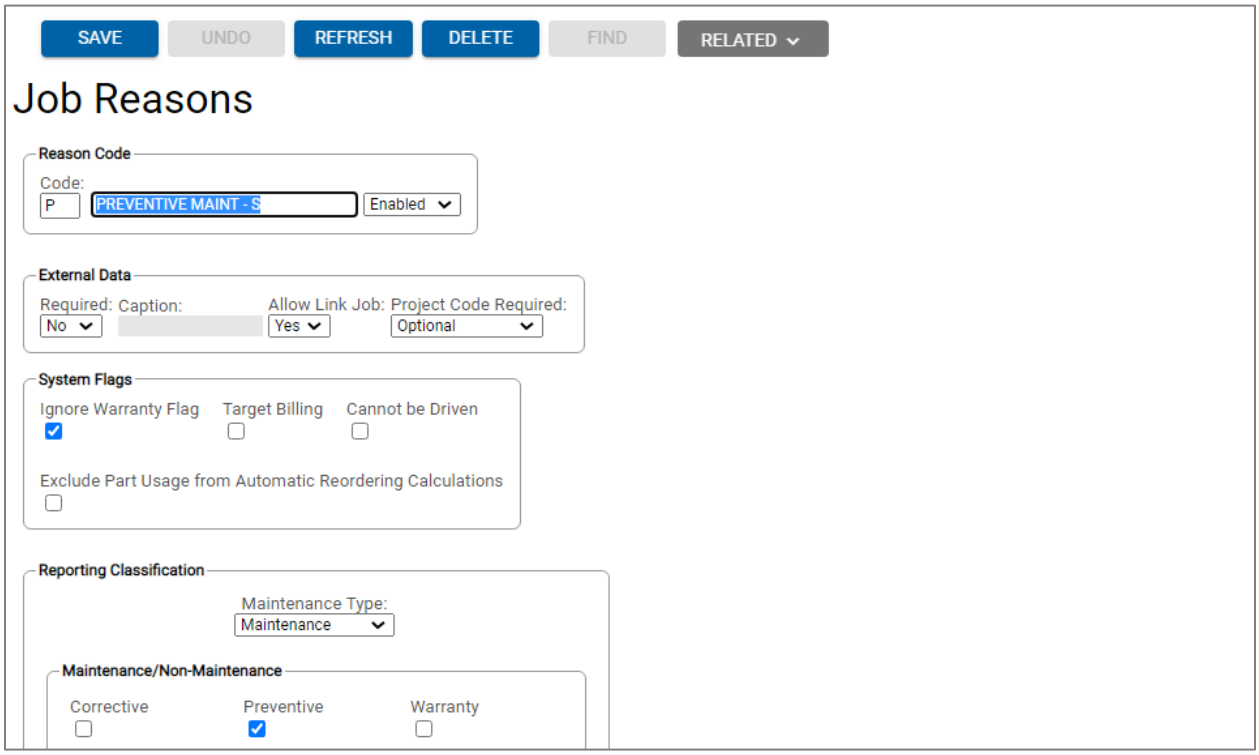
NOTE: You must have a job status of WR. FleetFocus™ M5 requires that all jobs must be set to either 'DON' or 'WR' (create a work request) before allowing you to close a work order or a status of BYE, if the real time labor capture is used to record time on work orders. The preloaded job codes are listed on the following page.

Job Status Codes

Status Code	Description
DON	JOB IS DONE
HRT	WORKER INJURED
WFA	WAITING FOR ASSIGNMENT
WFD	WAITING FOR DECISION
WFI	WAITING FOR INSTRUCTION
WFL	WAITING FOR LABOR
WFP	WAITING FOR PARTS
WFS	WAITING FOR SPACE
WFT	WAITING FOR TOOLS
WFU	WAITING FOR UNIT
WIP	WORK IN PROGRESS
WND	WORK NOT DONE

Job Reasons

Module(s): Workflow Management



The Job Reasons frame allows you to create and maintain a list of Job Reason Codes to define why a job is being performed.

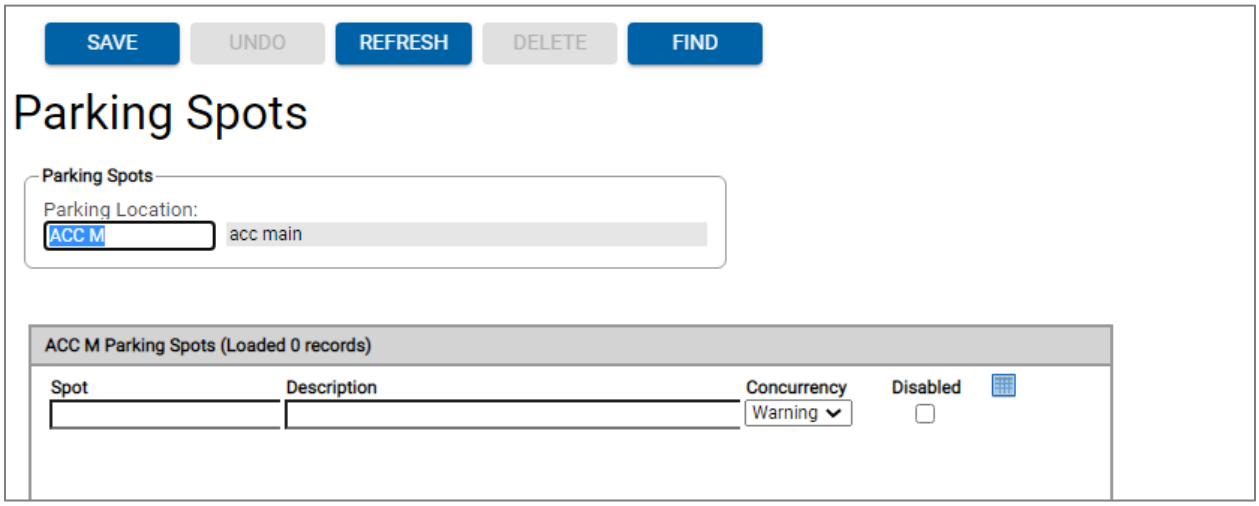
It is possible you can have multiple jobs on the same work order and each job has a different reason it is being performed on the unit. The Job Reason Codes allow you to differentiate between jobs for reporting and cost analysis purposes.

It is important to carefully review all codes loaded in this table and to select appropriate settings for each code to be used or to disable those that appear to be inappropriate for FleetFocus™ M5 use. The following job reasons are preloaded in M5:

Visit Reason	Description	Maintenance Flag
B	BREAKDOWN	M
D	DRIVER REPORT	N
M	WEATHER	M
N	NORMAL WEAR	M
P	PREVENTIVE	M
R	NEW VISIT REASON	M
W	WARRANTY	M

Parking Spots

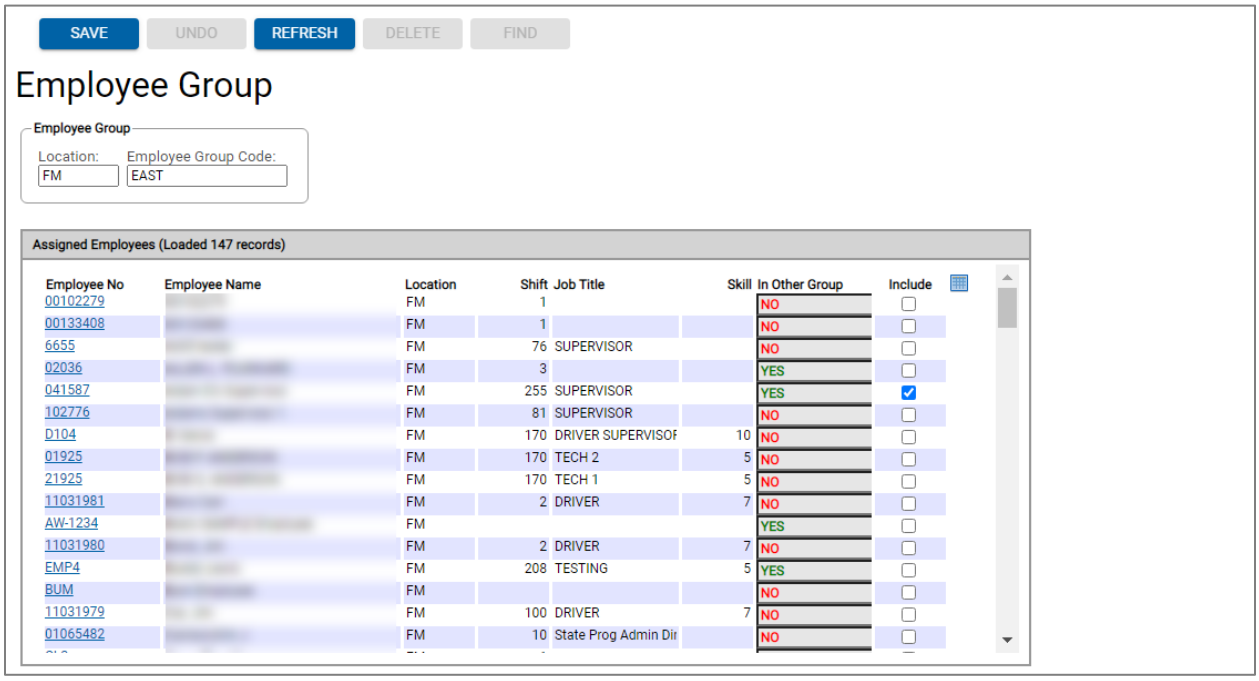
Module(s): Workflow Management



System Flag 5236 determines if parking spots will be validated fields to be designated on the work order on Work Order Main.

Employee Groups

Module(s): Workflow Management, Employee Management



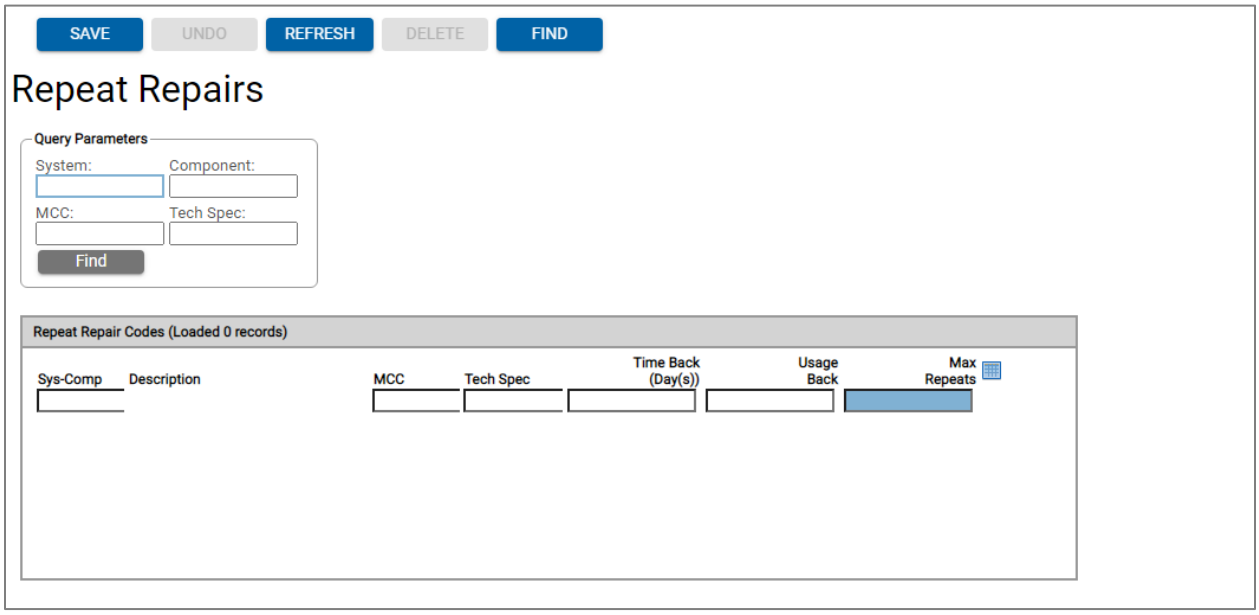
The Employee Group frame allows you to create and maintain groups of employees who share a common location for the purpose of assigning the group to jobs.

The Employee Number is a hyperlink that will take you to Employee Main. Select the Include checkbox to include the employee in the specific group.

In Other Groups - If this field displays 'No', then the employee is not in any other employee groups. If it displays 'Yes', the employee is in other employee groups. You can hover over the word 'Yes' to display a tool tip with the names of the other employee groups.

Repeat Repairs

Module(s): Workflow Management



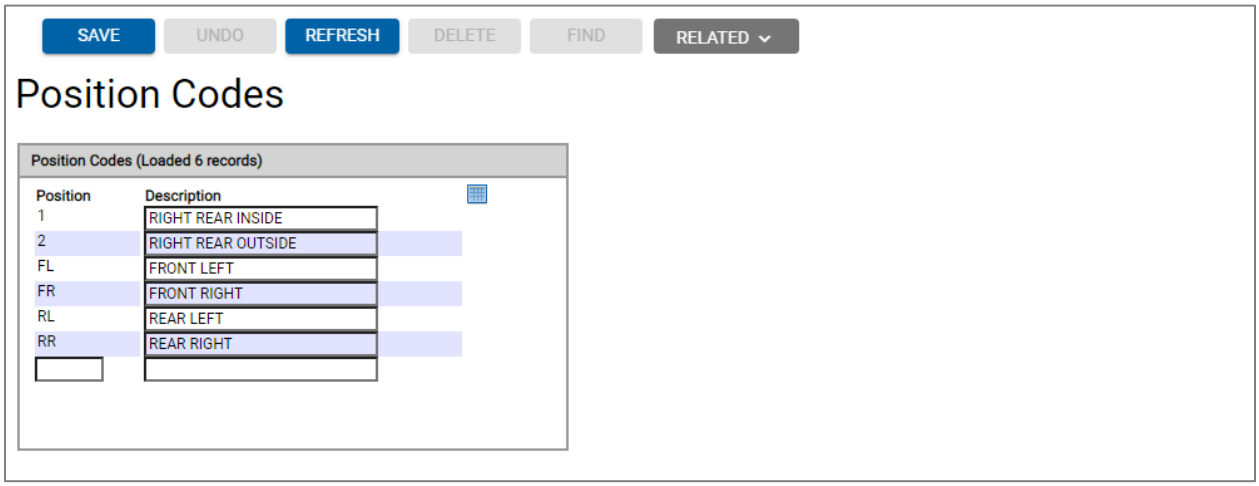
The repeat repairs frame is used to setup and maintain repeat repairs based on Tech Spec and MCC.

When a work order is opened for a unit with a job code that qualifies as a repeat repair, a warning message will appear showing detailed information such as the last work order number where the job was performed, elapsed days since the last repair and the elapsed usage.

The warning will also appear if the job has been added on the fly using Labor Wedge and if the job originated as a work request.

Position Codes

Module(s): Workflow Management



The Position Codes frame allows the user to create and maintain position codes that can be associated with valid systems and/or system/assembly codes. The Position Codes are used to associate a position to a transaction such as a labor charge, commercial charge or part charge to a job on a work order.

For example, a mechanic may be working on a brake job. There are positions for each brake, front right, front left, right rear, left rear.

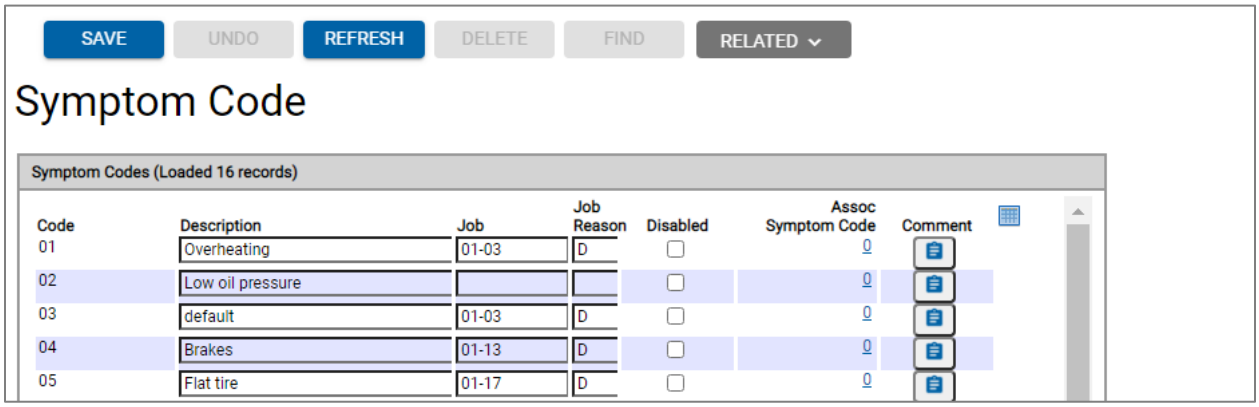
This frame allows you to create and maintain a list of these codes that you can configure to meet your needs. These Position Codes can be associated to System and System/Assembly Codes on a work order transaction.

Using the two system frames referenced above you can also make entry of these position codes required when a certain System or System/Assembly code is used on a work order job.

System Flag 5016 determines if the position code field will display on the Part Issue tab of Work Order Main and Part Request frame. If this flag is set to Advanced multiple position codes can be entered when the system or system/assembly code ALWAYS requires a position code entry and the quantity exceeds one.

Symptom Codes

Module(s): Workflow Management

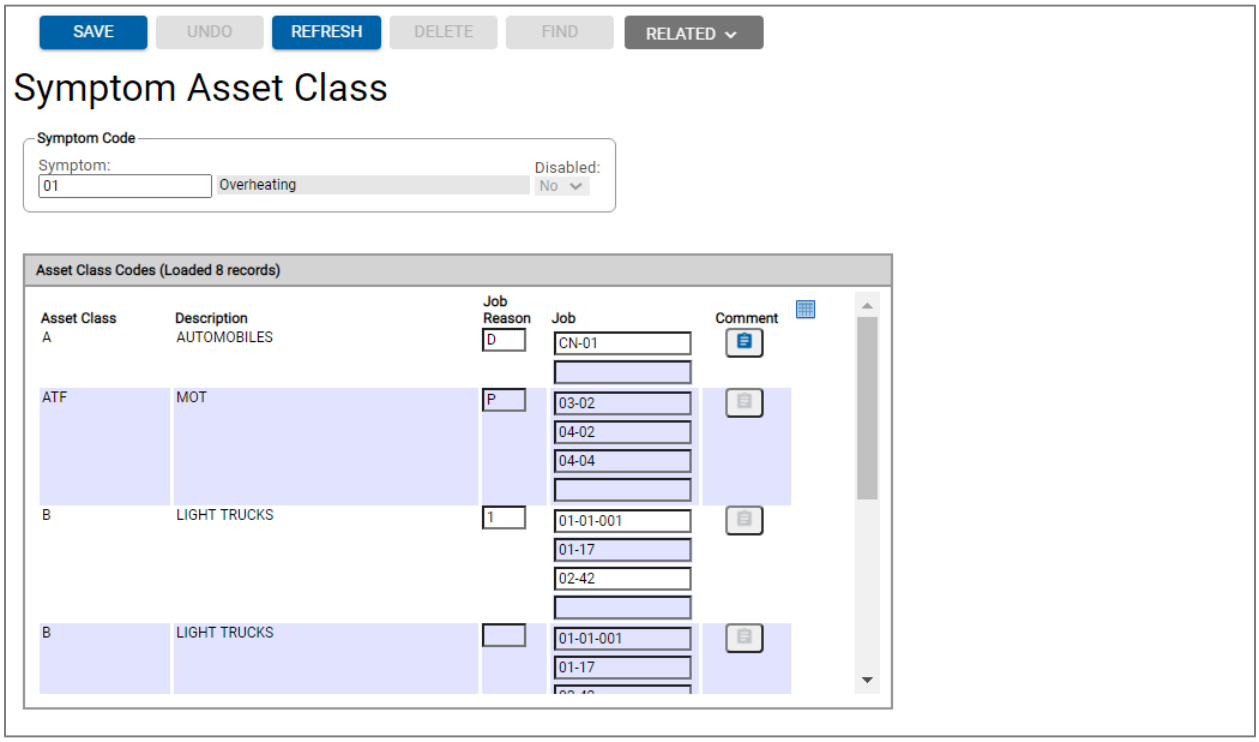


The Symptom Code frame allows the user to create symptoms for Work Request Incidents. The user may choose a valid code that describes a problem with a unit. The symptom code and description is user defined.

It can be linked to a job code and job reason along with comments. If the job code and reason are present on the symptom, a work request will be generated right away when the symptom is chosen on the Incident frame.

Symptom Asset Class

Module(s): Workflow Management



Since an asset class will have many symptoms codes associated to it, the Symptom Asset Class frame contains the validated field for the symptom code to be used on the Work Request Incident frame.

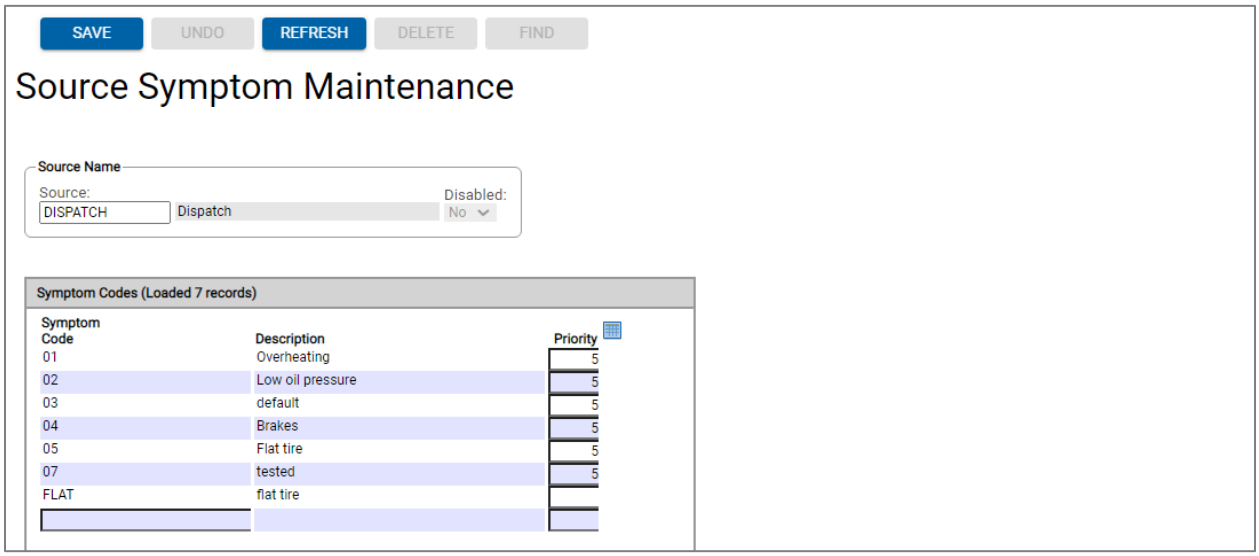
Request Source

Module(s): Workflow Management

The Request Source frame describes the person that reported the Work Request Incident. Examples of sources are, operator, dispatch, call center, public and mechanic.

Source Symptom Maintenance

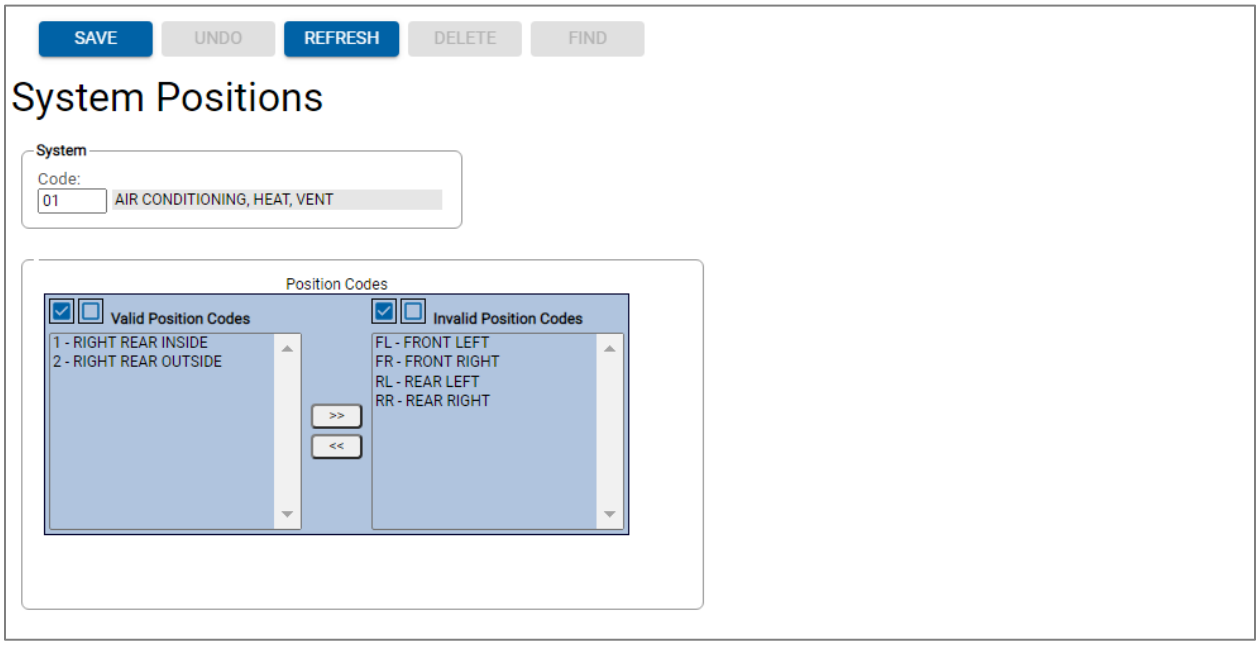
Module(s): Workflow Management



The Source Symptom Maintenance frame allows the user to associate the source with the symptom code to be used on the Work Request Incident Frame. There are times when a source such as a dispatch person should have access to different symptoms codes than another source such as a driver.

System Positions

Module(s): Workflow Management



The System Positions frame is used to designate which Position Codes are valid for a System Code and which Position Codes are not valid.

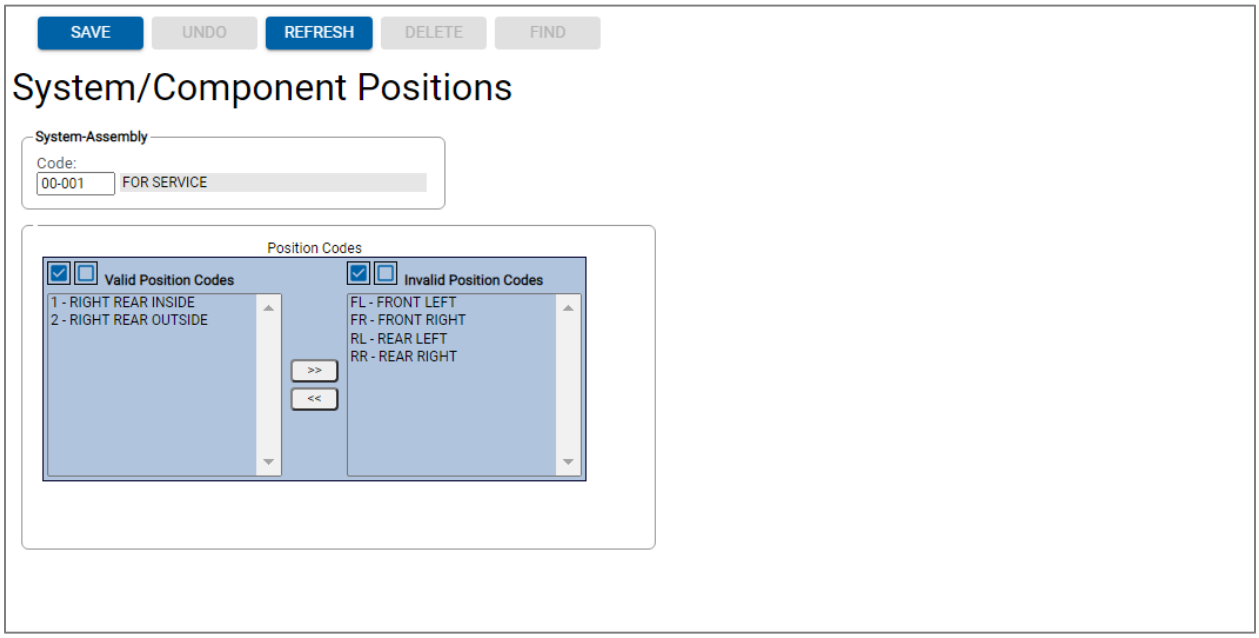
These Position Codes are created and maintained on the Position Codes frame and the System Codes are setup and maintained on the System Codes frame.

The codes are used to associate a position to a transaction such as a labor charge, commercial charge or part charge with a job on a work order. For example, a mechanic is working on a brake job. Brakes exist at certain positions relative to the whole unit such as right front, left front, left rear or right rear.

The mechanic will be prompted for what position is being worked on. (The actual choice of when the user will be prompted for a position is on the System and System/Assembly frames). This frame provides the opportunity of defining which positions are valid for the System.

System/Component Positions

Module(s): Workflow Management



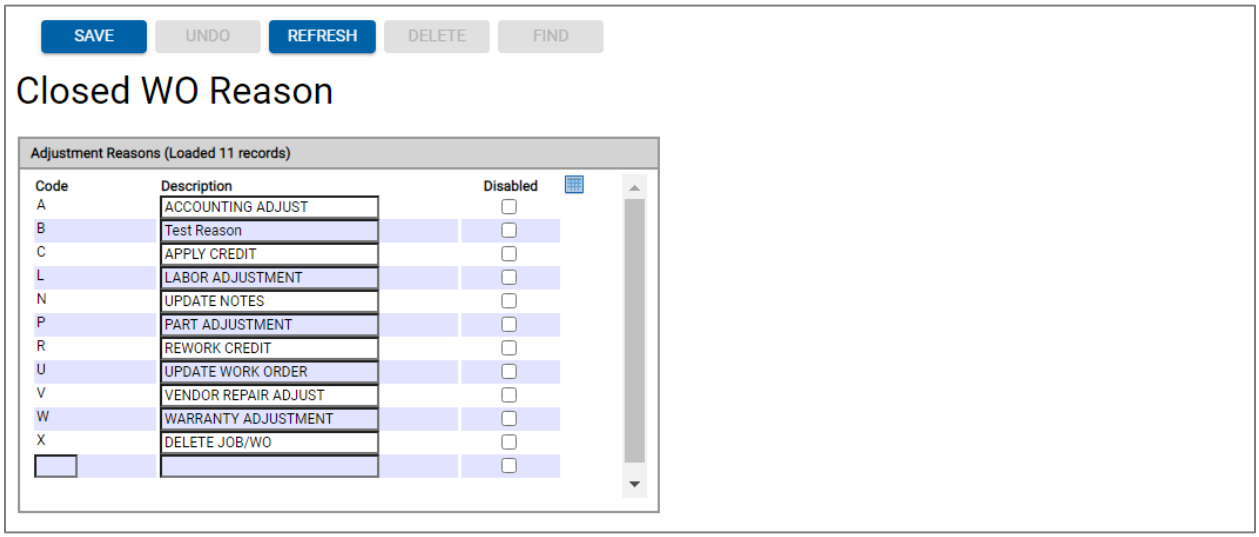
The System/Assembly Positions frame is used to designate which Position Codes are valid for a System/Assembly Code and which Position Codes are not valid.

These Position Codes indicate locations on a unit, such as front, rear, side, left, or right and are created and maintained on the Position Codes frame and the System/Assembly Codes are setup and maintained on the System/Assembly Codes frame.

This frame is similar to the System Positions code except that it is used for System/Assembly combinations as opposed to just System Codes.

Work Order Closed Reasons

Module(s): Workflow Management

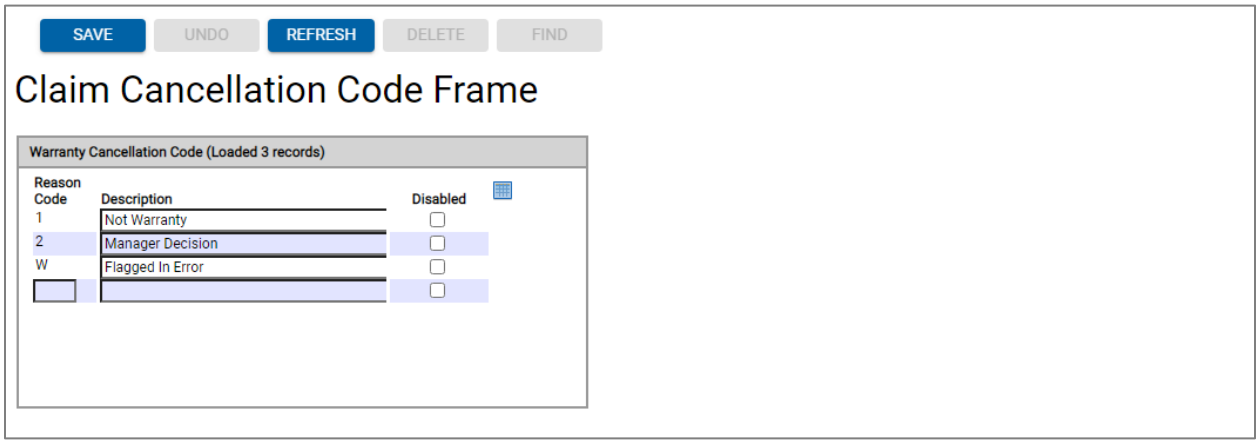


Work Order Adjustment Reasons/WO Closed Reasons identify when changes are being made to a closed work order on Work Order Main. These Adjustment Reasons can be used to indicate why the changes were made after the work order was closed.

The WO Adjustment Reasons frame allows you to create and maintain a list of codes for use when making adjustments to closed work orders. Only reasons that might be used for adjustments to closed work orders as previously discussed in this document should be loaded in this table.

Claim Cancellation Code

Module(s): Workflow Management

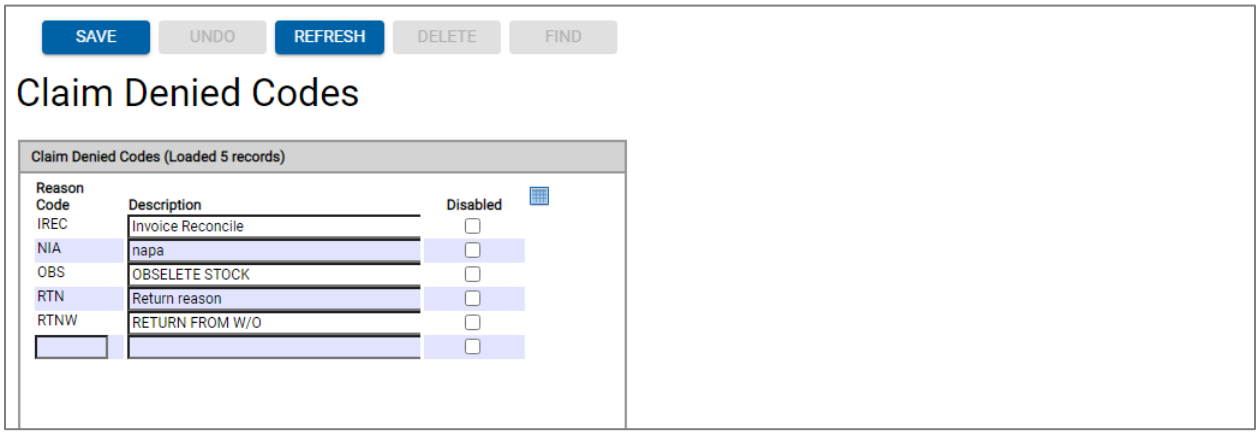


Warranty Cancellation Codes are user-defined codes used to identify why a job with a warranty violation was cancelled. This frame allows you to create and maintain a list of Warranty Cancellation Codes.

If System Flag 5066 is set to 'Y' entry of one of these codes will be required when cancelling a warranty job on Work Order Main in the Warranty Notes pop-up Reason field.

Claim Denied Codes

Module(s): Workflow Management



A warranty or core claim can be denied for a multitude of reasons. The Claim Denied Codes frame allows the user to define the code for better reporting.

The claim frame has a field for denial reason that can be entered using a choice of one of the valid claim denied reasons.

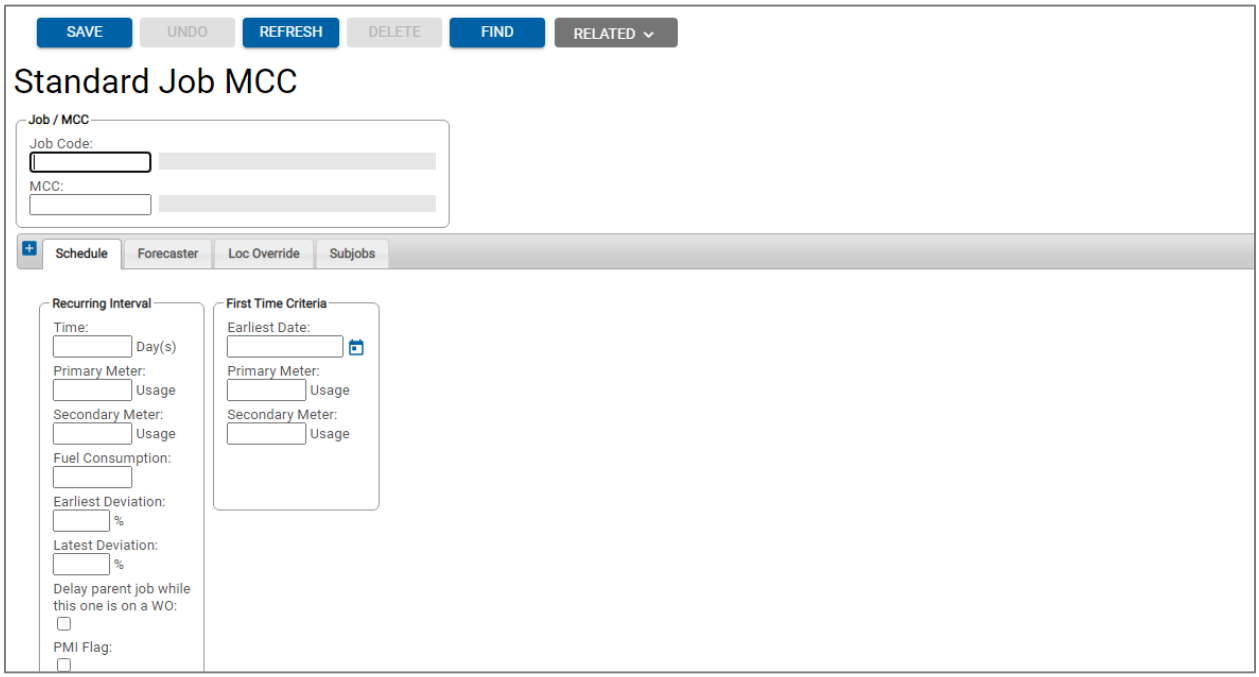
Adjust Invoice Claim Reason

Module(s): Workflow Management

In order to make an adjustment to a warranty claim that has already been invoiced, a reason is required. This frame allows you to create and maintain those codes.

Standard Job MCC

Module(s): Workflow Management, Asset Management



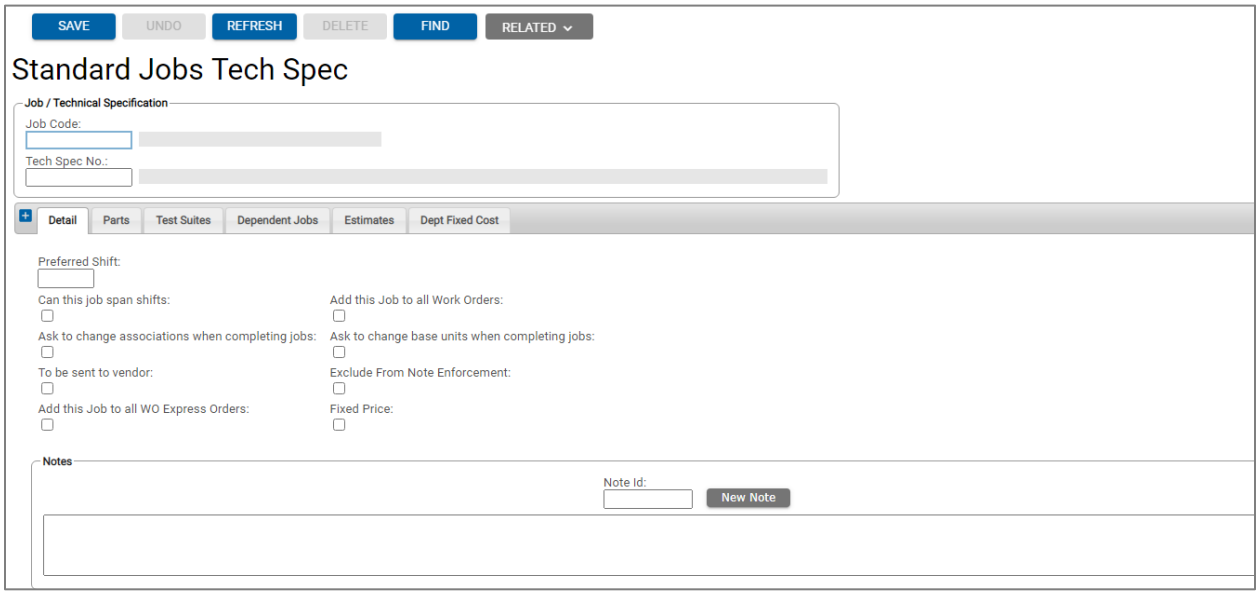
The Standard Job MCC frame allows you create and modify standard jobs that for units that share a common Maintenance Class Code (MCC). For repetitive repairs you can establish a schedule for the job as well as the technical requirements for accomplishing the job. You can also establish Standard Jobs for non-repetitive repairs that occur with enough frequency that your organization can determine standard times, parts, and costs.

M5 can forecast and schedule the repetitive repairs, such as preventative maintenance tasks, via the Forecaster Batch Process so that they will appear in the Work Request queue when opening a Work Order. Non-repetitive job parameters are available when you open a work order and add the specific job code to the work order.

The MCC and Tech Spec play an important role in defining standard job parameters for a unit. The MCC determines WHEN a scheduled job should be done/completed and the Standard Job Tech Spec determines WHAT should be done when the standard job is performed.

Standard Job Tech Spec

Module(s): Workflow Management, Asset Management



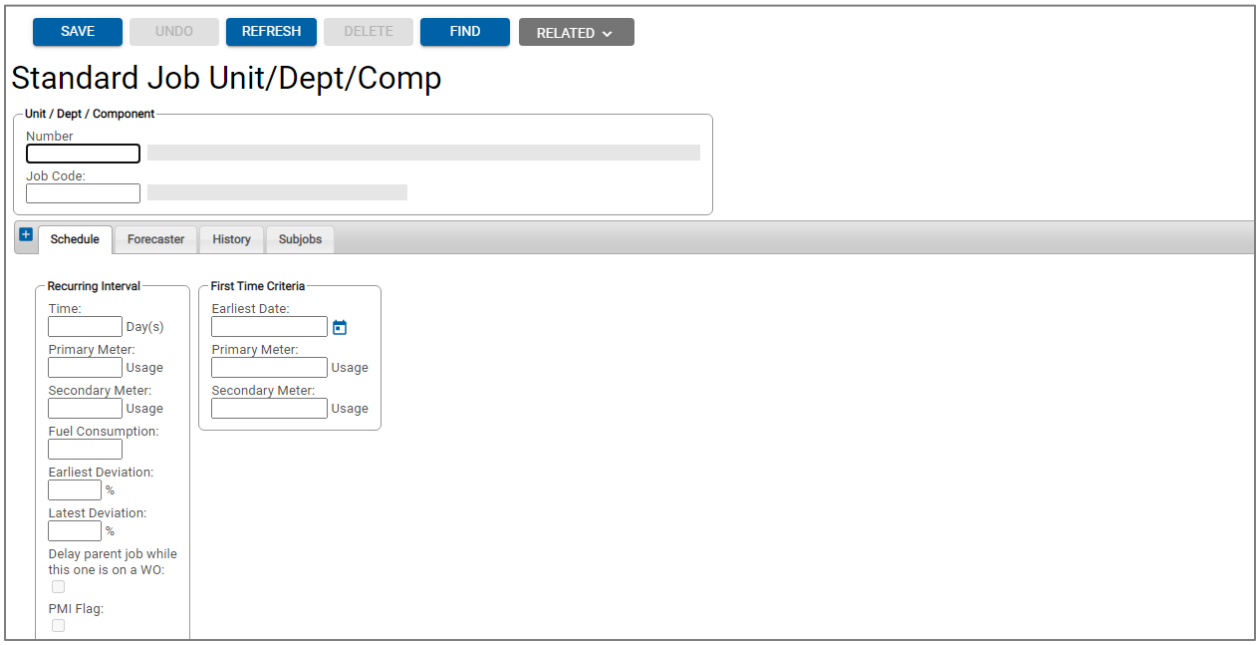
The Standard Job Tech Spec frame allows you to configure the technical requirements for performing a repetitive or non-repetitive standard job. Technical Specifications (Tech Specs) group mechanically identical units. For example, all 2015 Ford Pickups with the same engines, transmissions, brake systems, number of doors, and such.

You can configure the estimated times, parts needed, test suites, and attachments that are necessary for successful completion of the standard job.

The MCC and Tech Spec play an important role in defining standard job parameters for a unit. The Standard Job MCC determines WHEN a scheduled job should be done/completed and the Tech Spec determines WHAT should be done when the standard job is performed.

Standard Job Unit/Dept/Comp

Module(s): Workflow Management, Asset Management

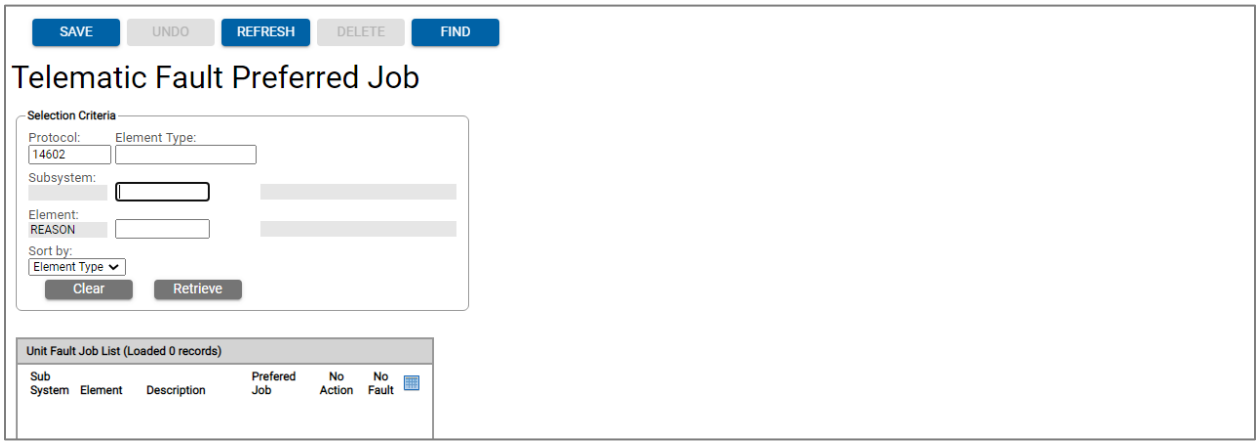


The Standard Job Unit/Dept/Component frame allows you to create standard job parameters at the Unit Level (or Department/Component Level) or to view and make modifications to some of the parameters setup on Standard Job MCC for the unit/department/component at the MCC Level. The frame will display both MCC and Unit Level jobs as well as the Next Due Date for each job.

You can change the last completion date for a job from this frame as well as view crucial Forecaster statistics. Keeping the data on this frame accurate is essential to have the Forecaster program correctly predict preventative maintenance jobs.

Telematic Fault Preferred Job

Module(s): Workflow Management, Vehicle Telematics



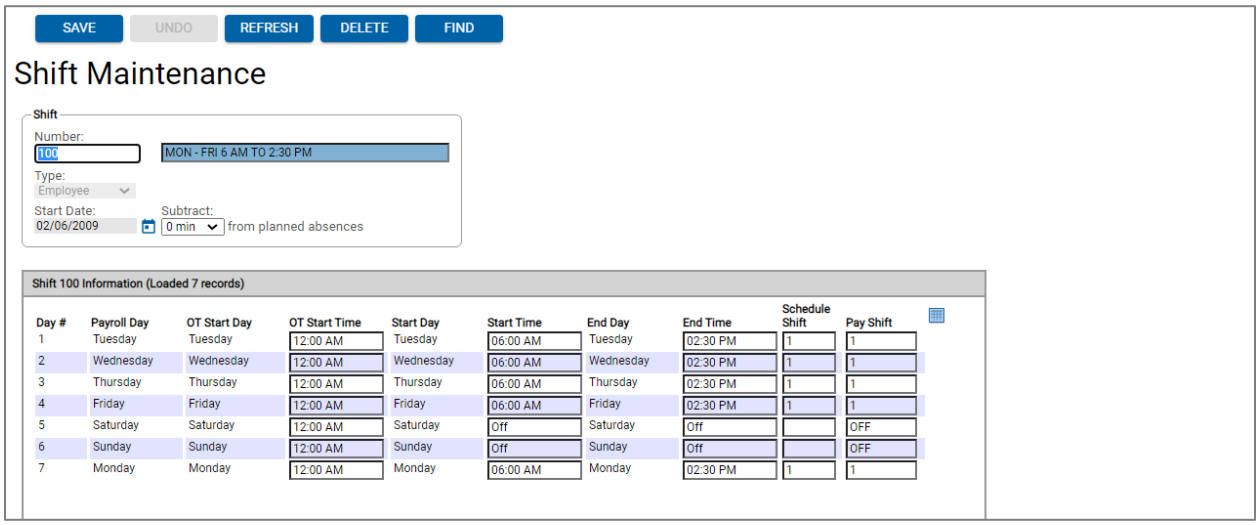
The Telematic Fault Preferred Job frame displays a list of unit fault codes for a designated protocol. You can assign a Preferred Job Code and choose No Action or No Fault for each subsystem/element fault code.

The “no fault” setting is common for fault codes that are informational-only where no action would be required. M5 uses the following sequence to search for the preferred job to apply to the fault: Tech Spec Main, Category Main, Fault Preferred Job Frame and System Flags.

Employee Management

Shift Maintenance

Module(s): Employee Management, Asset Management, Workflow Management



The Shift Maintenance frames allows you to create and maintain shift codes and payroll details for all work shift in your fleet organization. Employees, Units, and Locations can all have shifts in M5. Shifts are defined for employee and non-employee shifts. They indicate the working hours or operational hours for the entity or employee to which they are assigned.

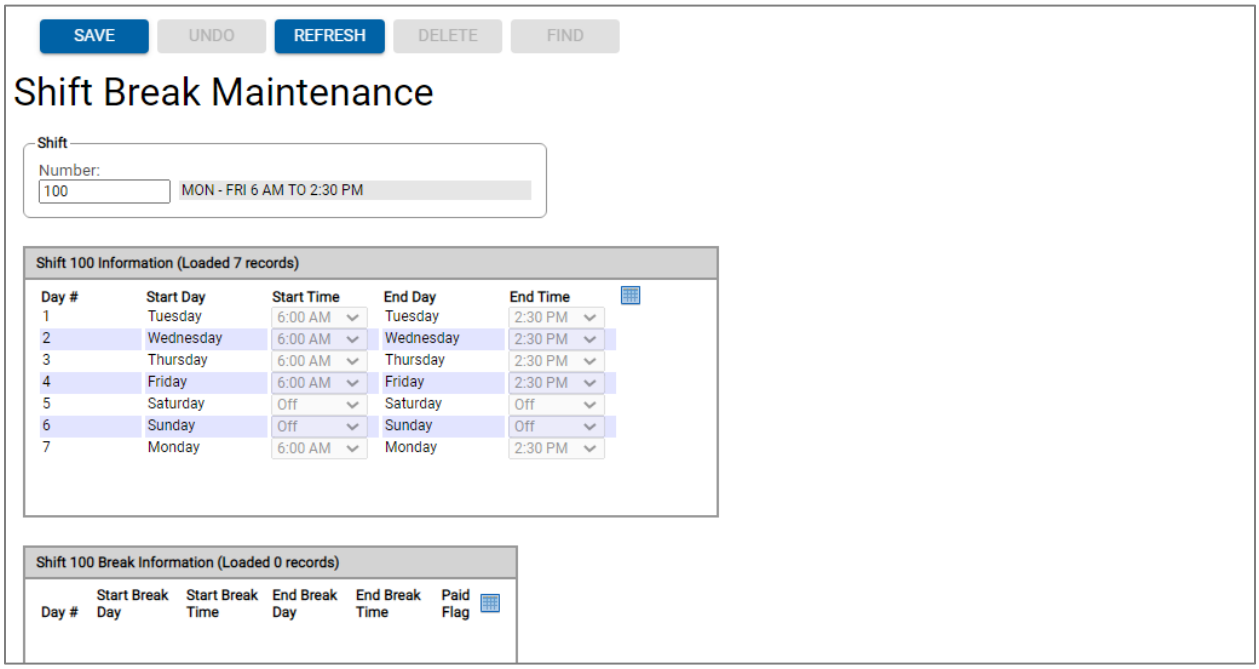
Employee shifts define the hours an employee is expected to be available for work and are used to calculate regular and overtime hours. Employees will often have a variety of shifts including day shift, afternoon, or night. Appropriate pay rates can then be assigned to shifts if the user desires and labor time tracked.

Unit shifts specify the hours a unit is expected to be available for normal use for the using Department. The system will use these shift hours when calculating operational downtime information.

Location shifts define the hours of operation for a specific shop. The system will use maintenance location shift information when calculating maintenance downtime information.

Shift Break Maintenance

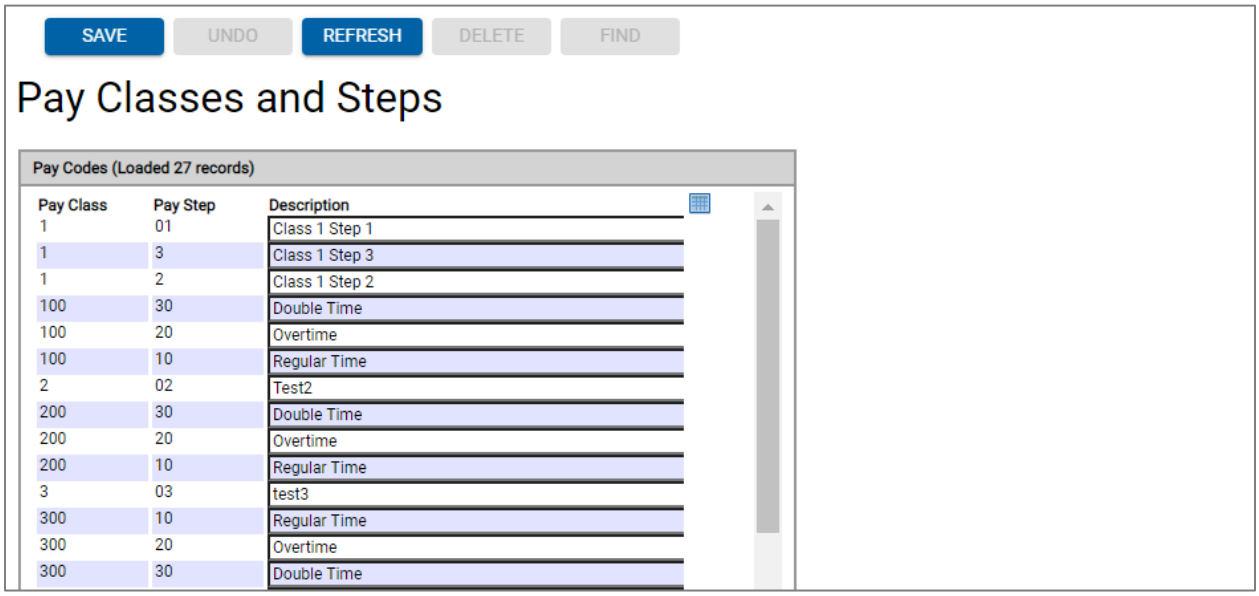
Module(s): Employee Management



A Fleet Organization's employees are normally granted breaks several times a day. These may be paid or unpaid. To automatically record these breaks against labor time performed use Shift Break Maintenance to establish the data.

Pay Classes and Steps

Module(s): Employee Management



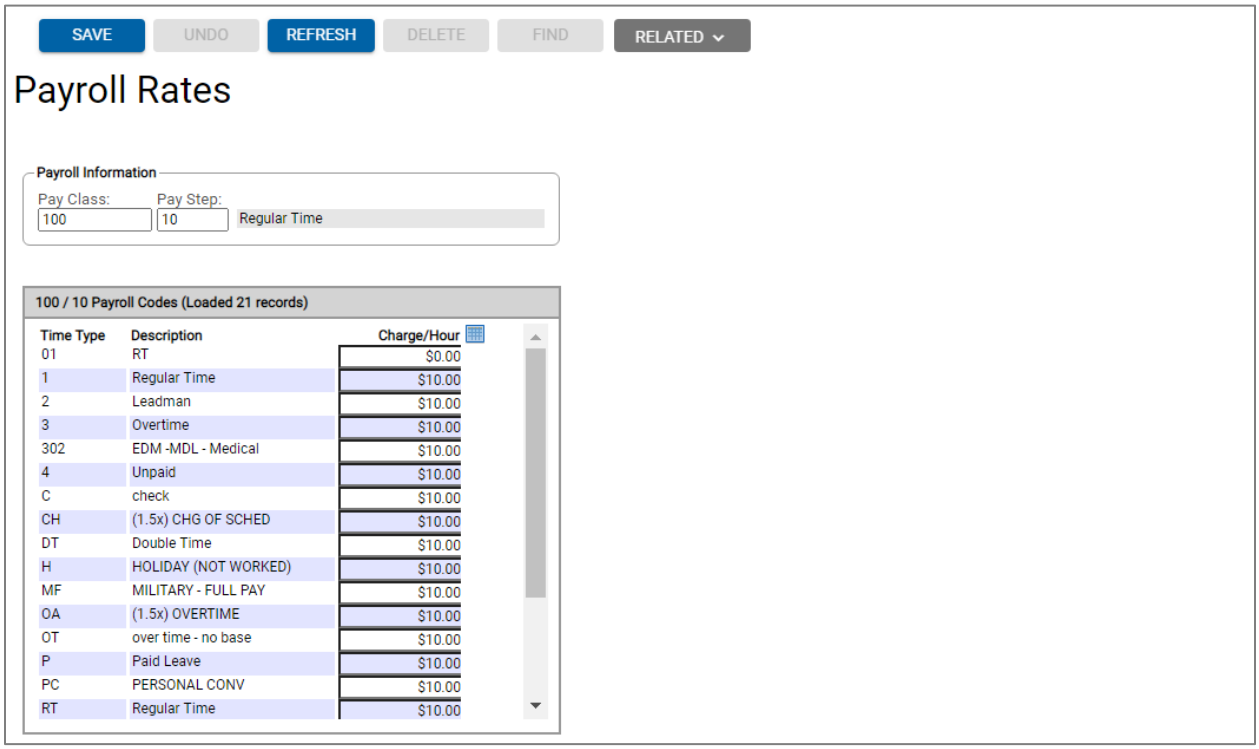
The Payroll Pay Classes and Steps frame allows you to create and maintain a list of codes used to define a structure for compensation consisting of multiple classes with multiple steps in each class.

These codes are then associated to Time Types on the Pay Rates frame to define the specific rates for payroll purposes.

System Flag 5003 determines if pay class, steps are required on labor charges.

Payroll Rates

Module(s): Employee Management

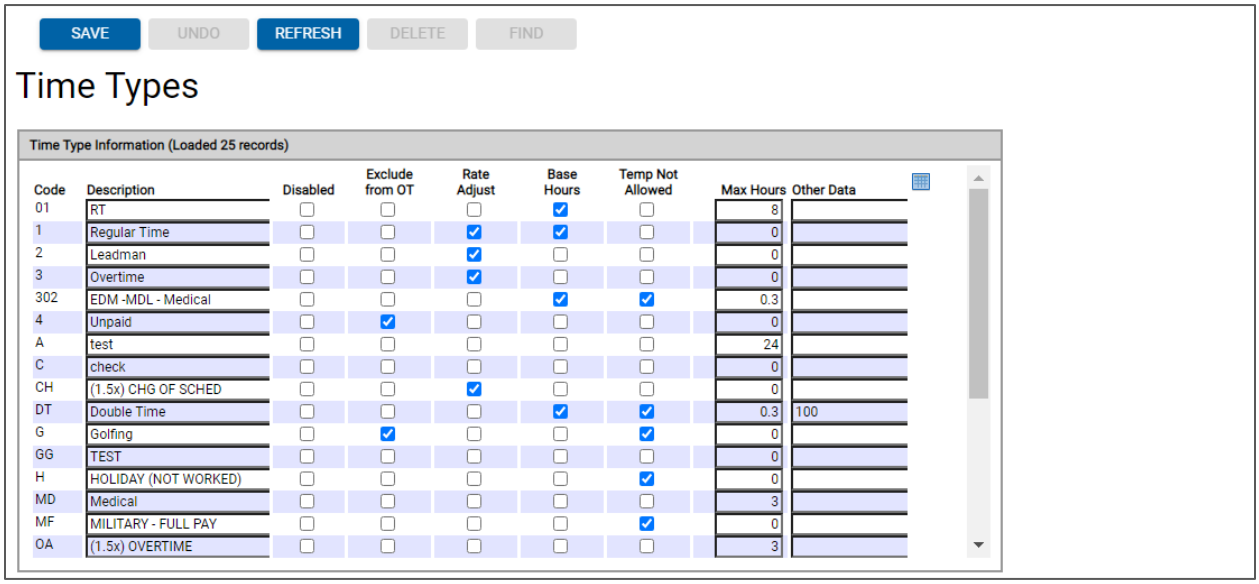


The Pay Rates frames allows you to associate the Pay Classes and Steps with the Time Types and configure a specific hourly Pay Rate for each Time Type available from the Time Type Matrix.

To associate a particular pay rate with a pay class and setup, the payroll rate frame must be setup.

Payroll Time Types

Module(s): Employee Management, Workflow Management



Code	Description	Disabled	Exclude from OT	Rate Adjust	Base Hours	Temp Not Allowed	Max Hours	Other Data
01	RT	☐	☐	☐	☑	☐	8	
1	Regular Time	☐	☐	☑	☑	☐	0	
2	Leadman	☐	☐	☑	☐	☐	0	
3	Overtime	☐	☐	☑	☐	☐	0	
302	EDM -MDL - Medical	☐	☐	☐	☑	☑	0.3	
4	Unpaid	☐	☑	☐	☐	☐	0	
A	test	☐	☐	☐	☐	☐	24	
C	check	☐	☐	☐	☐	☐	0	
CH	(1.5x) CHG OF SCHED	☐	☐	☑	☐	☐	0	
DT	Double Time	☐	☐	☐	☑	☑	0.3	100
G	Golfing	☐	☑	☐	☐	☑	0	
GG	TEST	☐	☐	☐	☐	☐	0	
H	HOLIDAY (NOT WORKED)	☐	☐	☐	☐	☑	0	
MD	Medical	☐	☐	☐	☐	☐	3	
MF	MILITARY - FULL PAY	☐	☐	☐	☐	☑	0	
OA	(1.5x) OVERTIME	☐	☐	☐	☐	☐	3	

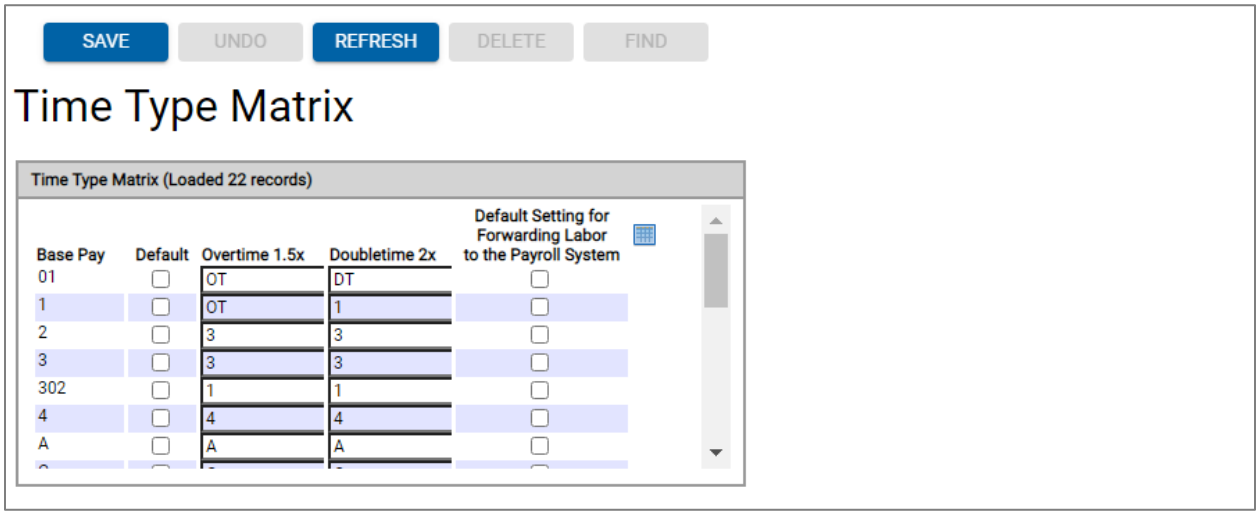
The Payroll Time Types frame allows you to define and configure the various time types that will be used for recording labor for payroll processing.

The various pay scales are user-defined. Some examples would be, 'Regular Time', 'Overtime', Double-Time'. Only one default can be chosen on the Time Types Matrix.

Most companies chose the “Regular Time” as the Base Pay. System Flag 5003 determines if time type is required on labor charges.

Time Type Matrix

Module(s): Employee Management, Workflow Management

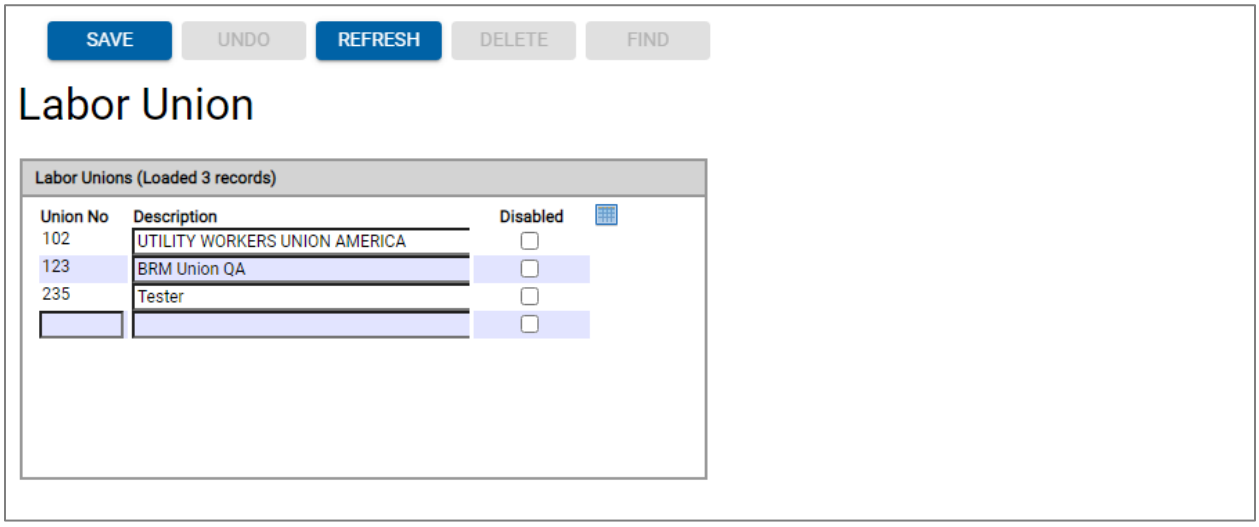


The Time Type Matrix frame allows you to define the various pay scales that your organization will have available to use on payroll for all your work shifts. These pay scales are defined using the Time Type codes for regular time, overtime, or double-time.

The Matrix is also used to decide which of these types will be the default time type. Most companies chose a Regular Time type as the default.

Labor Unions

Module(s): Employee Management

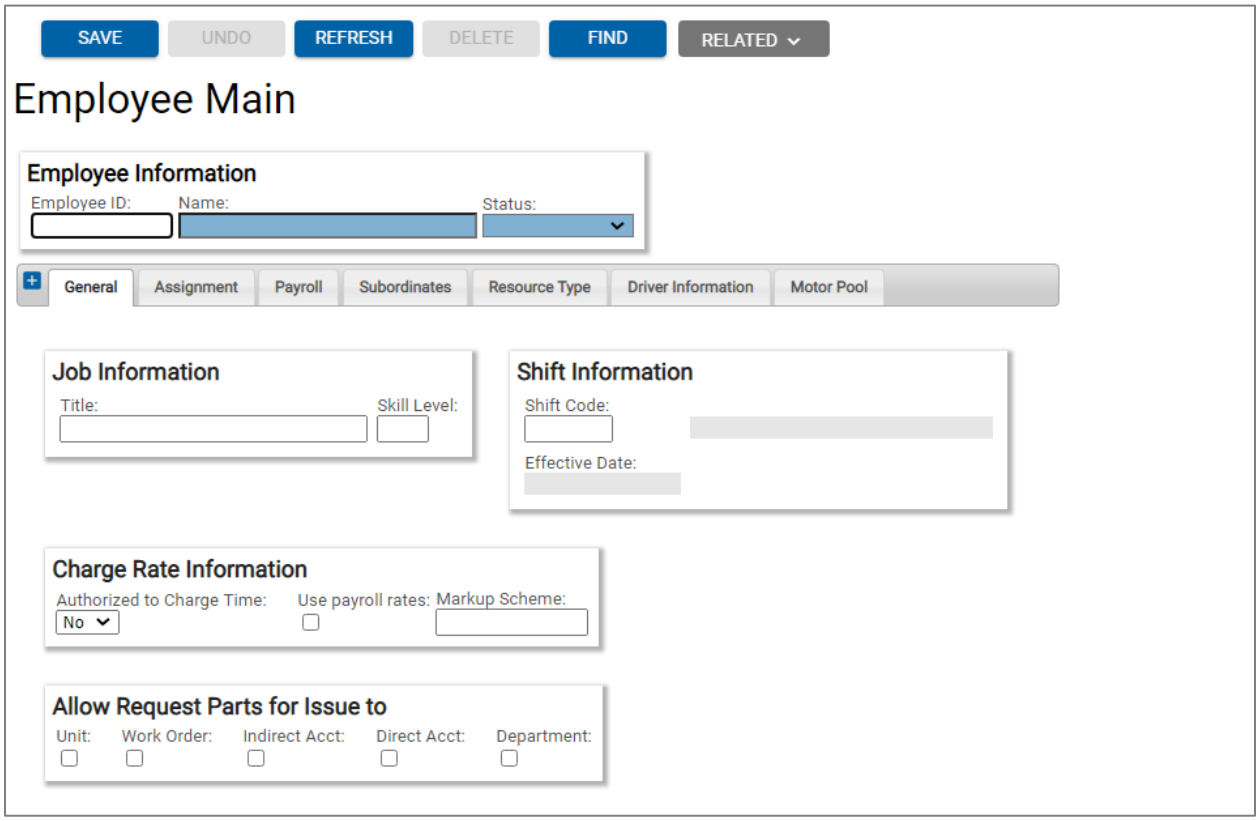


The Labor Unions frame is used to create and maintain codes to identify different labor unions that employees in your workforce might belong to. These Labor Union codes can be assigned to employees on Employee Main by using the Assignment tabs.

Labor union codes are used to report labor time worked for an employee who belongs to a specific union. These codes are not required.

Employee Main

Module(s): Employee Management, Asset Management, Workflow Management, Inventory Management



Employees are personnel who operate equipment in the fleet or who perform the work to maintain it. The Employee Main frame is used to create and maintain information about each employee.

Employees are people who record time on work orders, rent motor pool vehicles or are operators of units. Employees may have additional items. Refer to the *M5 System Administration* section for more information. You can:

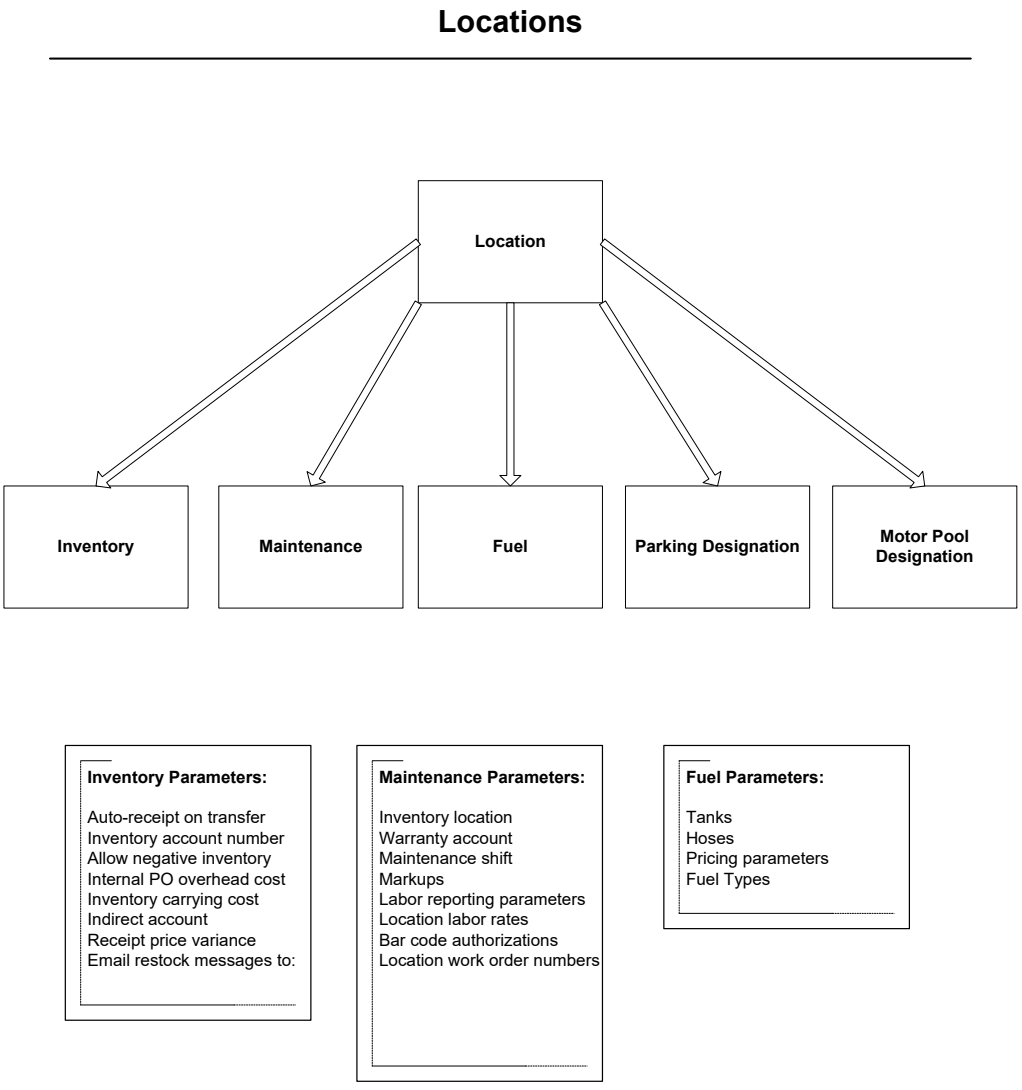
- Establish the employee's home location.
- Establish the employee's direct or indirect labor charges.
- Establish resource types.
- Initiate an employee transfer (you must be a supervisor to initiate an employee transfer and to display a list of your subordinates).
- Enter operator information as needed.

M5 General Use Codes

There are a number of M5 configuration codes that are used throughout the application. These codes are discussed in this section.

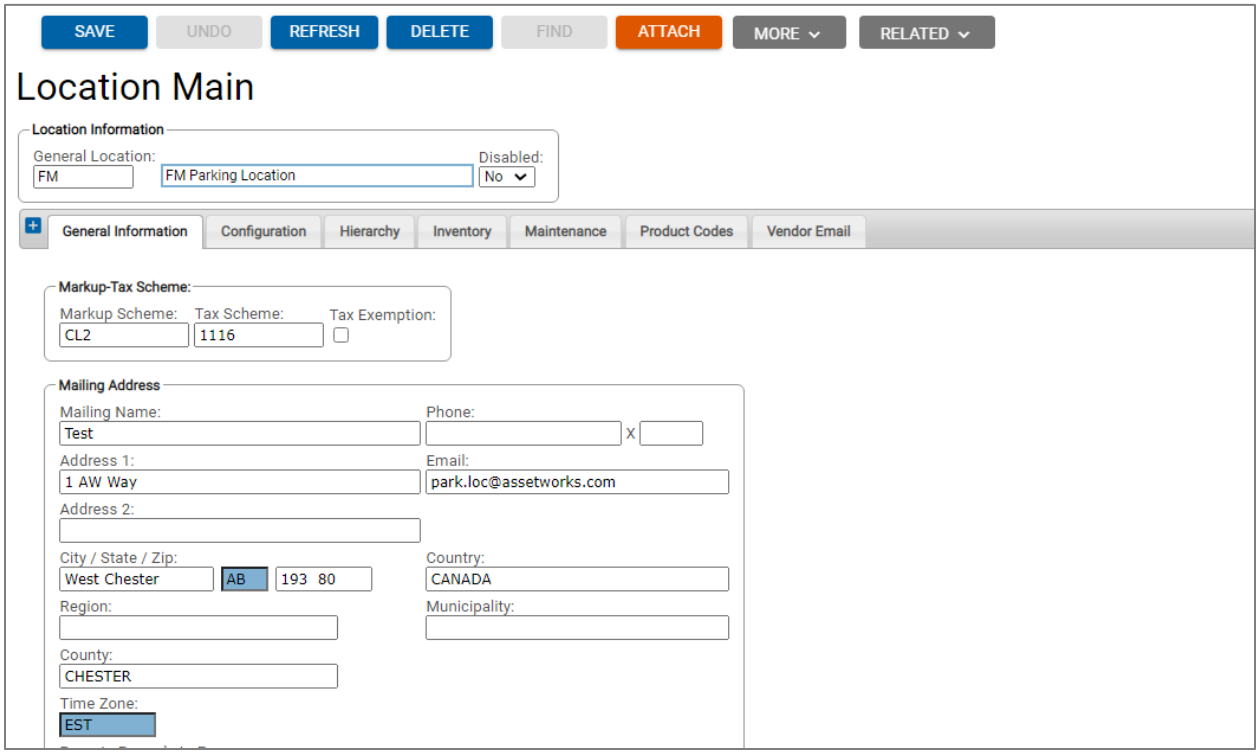
Locations

This is a schematic of the relationship between the master part record and the location records.



Location Main

Module(s): Asset Management, Inventory Management, Employee Management, Workflow Management



Establishing locations allows you to categorize information specific to a physical place, specify a default organization for work charges, and provide security by restricting who can log in to which locations.

There are several kinds of locations. Garages or shops are used for maintaining your units. We refer to these places as maintenance locations.

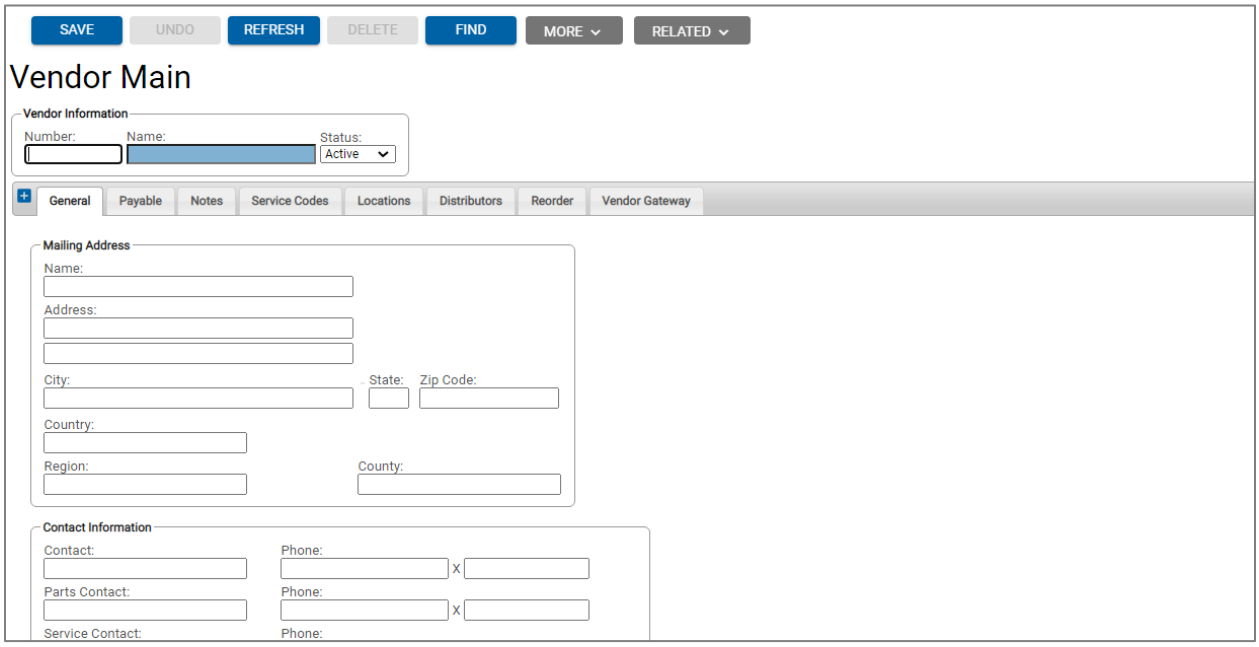
- A fueling location is where fuel and other consumable products are stored.
- A parking location is where a unit is stored when it's not in use.
- An inventory location is where parts are stocked.
- A motor pool location is where a fleet of rental vehicles is managed.
- A delivery location is a location that can be used to receive new units.
- A recovery center is a location where revenues are accrued.

In addition, for purposes of tracking and reporting, these locations need not be real physical spaces but can also serve to represent a group of units. Locations can also have items.

Vendor Information

Vendor Main

Module(s): Inventory Management, Workflow Management, Employee Management, Fuel Management



The Vendor Main frame is used to create and maintain vendor records to be used in inventory management and workflow management as well as employee and fuel management.

This vendor information can be used for parts and products, commercial repairs, and unit purchases. The vendor number is also used in reordering, processing part orders, receiving of non-stock parts, and commercial charges.

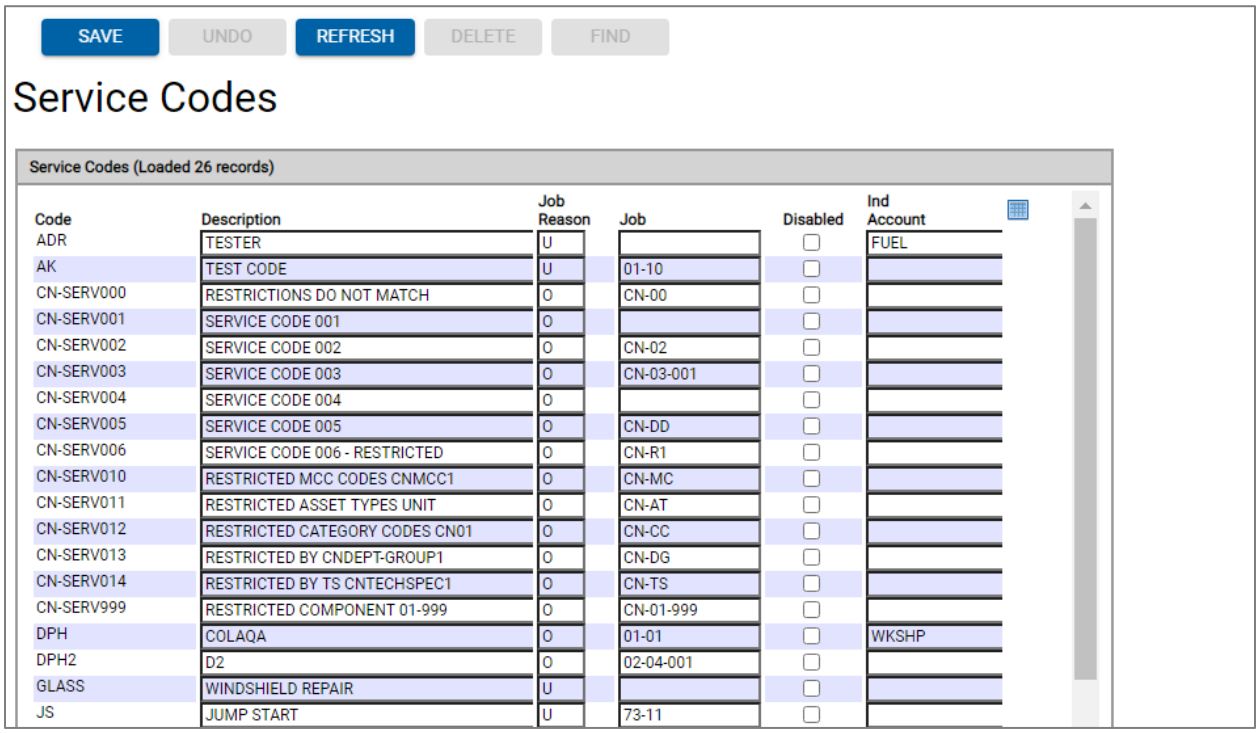
The Vendor Main frame is used to add, modify, display or delete information about a vendor. This frame also includes the ability to disable and then to re-enable a vendor. This is particularly appropriate for vendors who lose a contract and are not used during the current contract term, but who continue to bid, and perhaps win the contract back the following year.

The organization should gather data for the vendor file to ensure that all necessary vendors for parts, commercial repairs and unit purchases, as appropriate, are in FleetFocus™ M5 and to take the opportunity to add or correct such items as the vendor's phone number, contact name and/or email address. FleetFocus™ M5 facilitates the use of Internet mail addresses for communication to vendors.

The vendor items table allows you to track additional information, such as, a vendor's response time, an emergency phone number, and specialty products carried by this vendor.
You set up user-defined items using Item Master Definition and then assign values to those items in the Vendor Items Frame.

Vendor Service Codes

Module(s): Inventory Management, Workflow Management, Employee Management, Fuel Management



Code	Description	Job Reason	Job	Disabled	Ind Account
ADR	TESTER	U			FUEL
AK	TEST CODE	U	01-10		
CN-SERV000	RESTRICTIONS DO NOT MATCH	O	CN-00		
CN-SERV001	SERVICE CODE 001	O			
CN-SERV002	SERVICE CODE 002	O	CN-02		
CN-SERV003	SERVICE CODE 003	O	CN-03-001		
CN-SERV004	SERVICE CODE 004	O			
CN-SERV005	SERVICE CODE 005	O	CN-DD		
CN-SERV006	SERVICE CODE 006 - RESTRICTED	O	CN-R1		
CN-SERV010	RESTRICTED MCC CODES CNMCC1	O	CN-MC		
CN-SERV011	RESTRICTED ASSET TYPES UNIT	O	CN-AT		
CN-SERV012	RESTRICTED CATEGORY CODES CN01	O	CN-CC		
CN-SERV013	RESTRICTED BY CNDEPT-GROUP1	O	CN-DG		
CN-SERV014	RESTRICTED BY TS CNTECHSPEC1	O	CN-TS		
CN-SERV999	RESTRICTED COMPONENT 01-999	O	CN-01-999		
DPH	COLAQA	O	01-01		WKSHP
DPH2	D2	O	02-04-001		
GLASS	WINDSHIELD REPAIR	U			
JS	JUMP START	U	73-11		

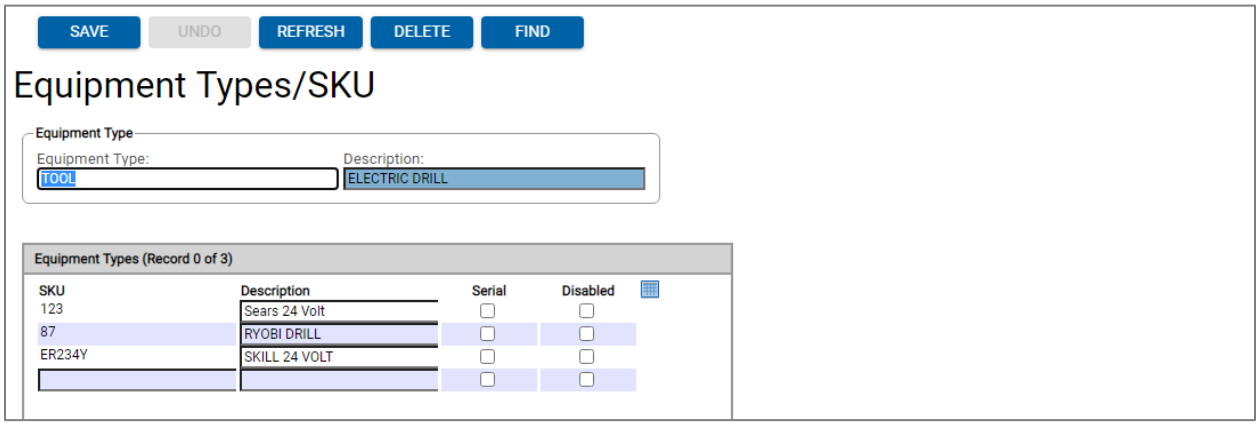
Vendor Service Codes can be used to define the type of service provided by a particular vendor. This frame allows you to create and maintain a list of these codes that can be assigned to vendors on Vendor Main, Preferred Vendors, and for use on Service Orders as well as the Direct Invoice frames.

Example of services would be inspection shop, transmission repair, windshield replacement, engine repair and so on.

If using the Direct Invoice Entry frame, then a job reason may be required if designated on the Job Reason frame. A job code can also be entered, which will appear for the user on the Direct Invoice Entry detail line if the user did not enter a vendor SKU that resulted in a job code.

Equipment Types/SKU

Module(s): Asset Management



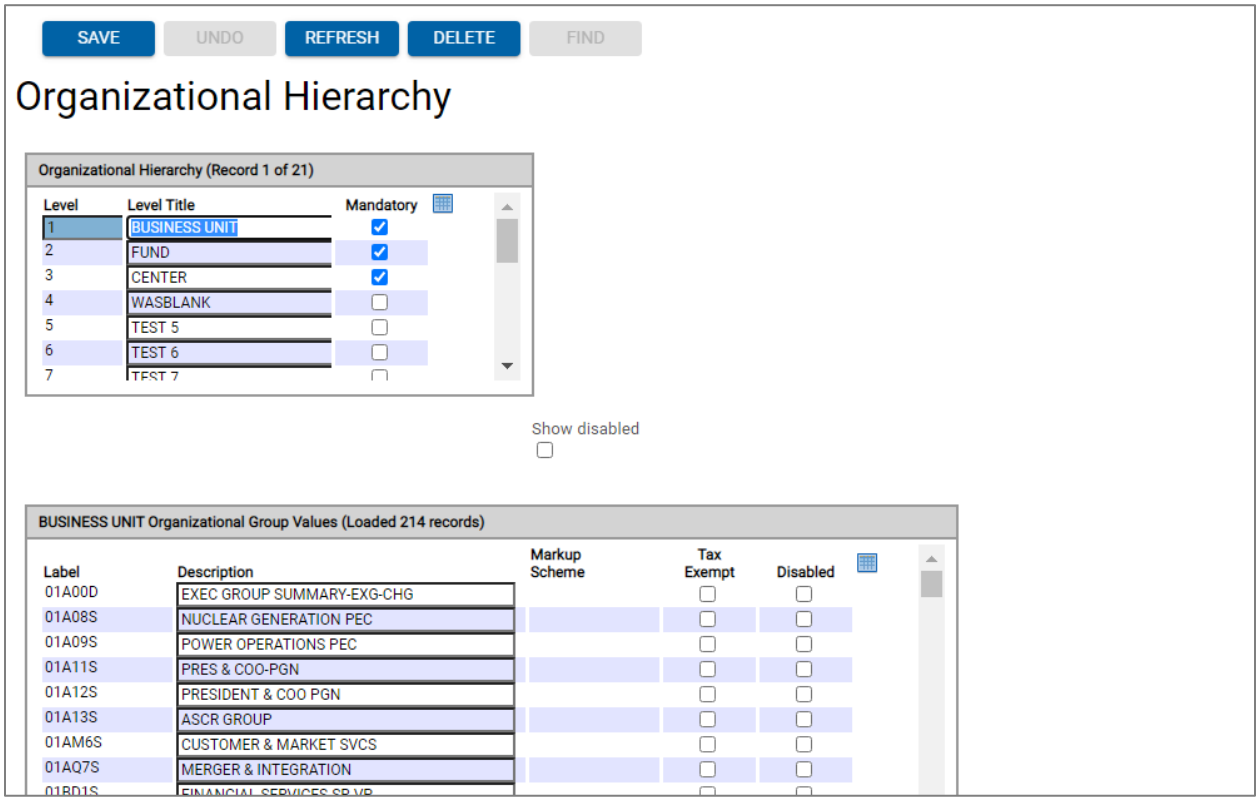
This is the vendor's own code for the service that can be used on a commercial contract or Direct Invoice Entry. The user creates their own equipment type along with the various vendor services/SKU.

The Equipment Types SKU frame allows you to create and maintain codes to group equipment together by functionality and identify each piece of equipment with an asset number and description.

Department Information

Department Organization Hierarchy

Module(s): Asset Management, Inventory Management, Workflow Management, Employee Management

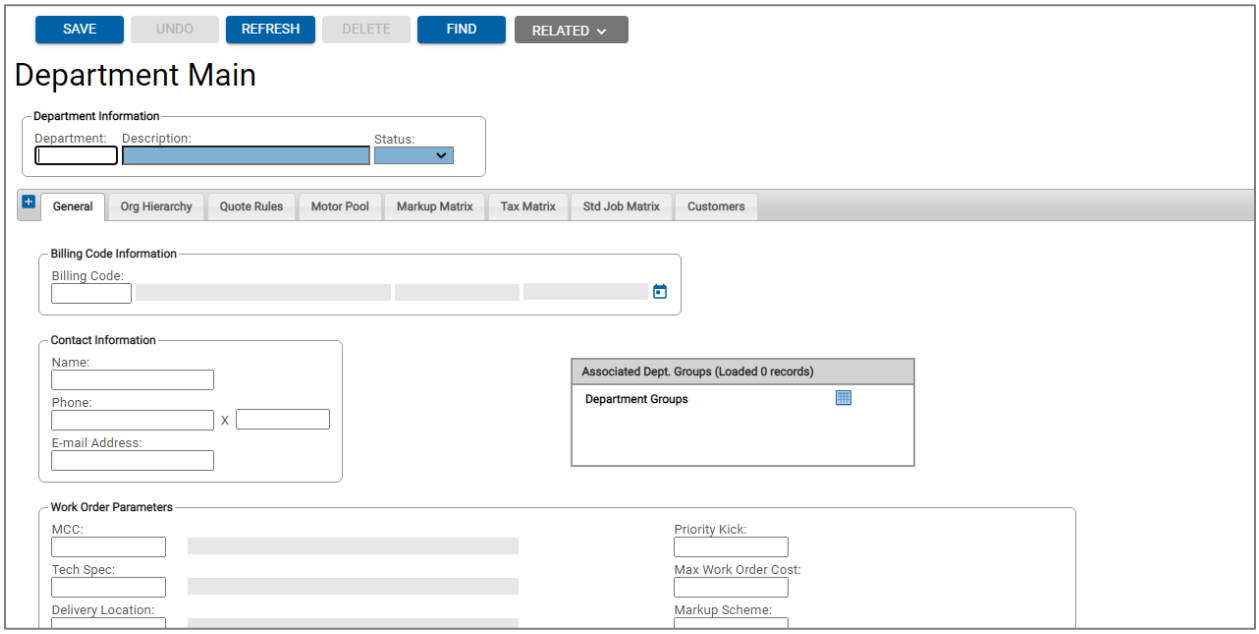


The Department Organization Hierarchy feature allows you to establish the relationship of the departments in FleetFocus™ M5 to higher-level organizations in your company's structure for reporting.

This hierarchy first defines the primary levels of the structure and then assigns groups to each level. The groups can be assigned a Markup Scheme and Tax status.

Department Main

Module(s): Asset Management, Inventory Management, Work Flow Management, Employee Management



The Department Main frame allows you to create and maintain Department records for use with various levels of functionality throughout the M5 application:
Locations, Employees, Units, Components, Work Orders, DAF (Department Access Function) and Billing to name a few.

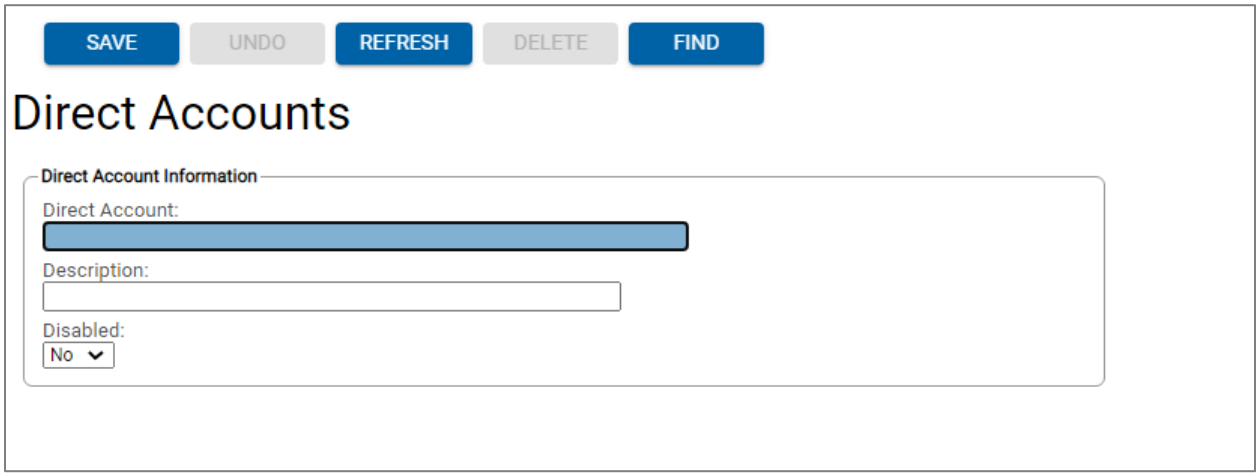
The Owning department or Using department controls the organizational hierarchy of the entity (location, employee and unit). Each main frame for units, employees and locations allows the user to view the current organizational hierarchy for the departments related to the entity.

A location belongs to an owning department, an employee has a home location (which has an owning department) and a unit has both an owning and using department. Departments can have items.

Accounting Codes

Direct Accounts

Module(s): Asset Management, Inventory Management, Work Flow Management, Employee Management



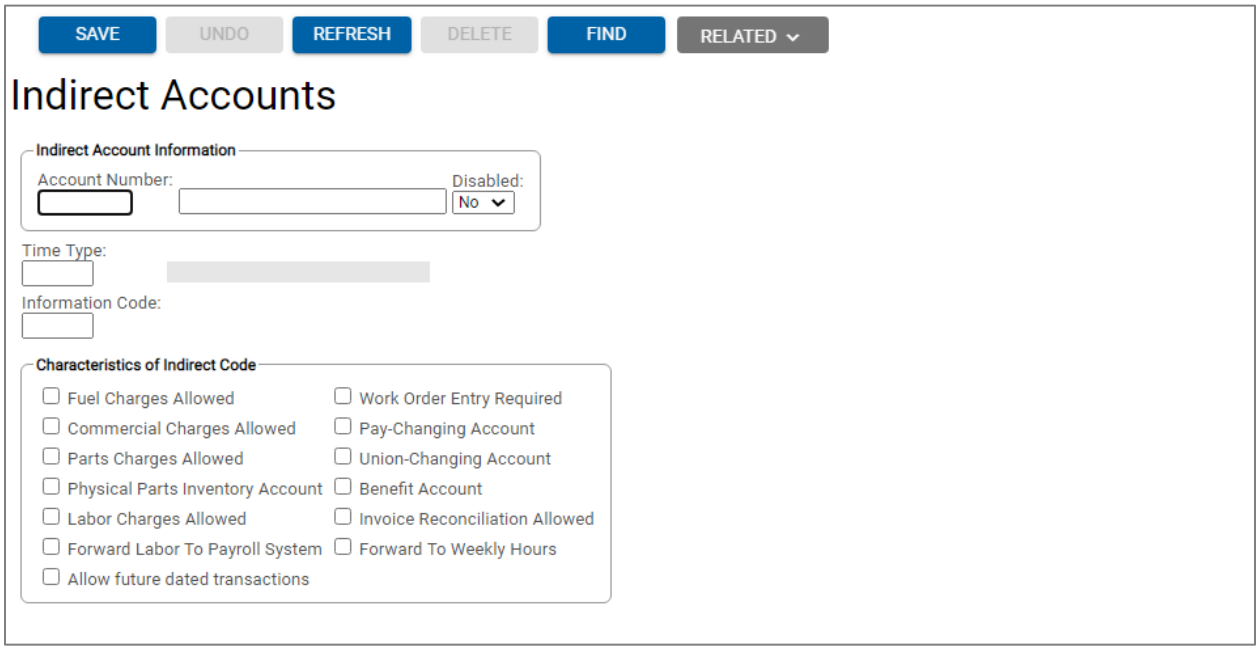
The Direct Account Codes frame is used to create and maintain direct account codes and their descriptions for use in billing activities.
These codes can be associated with Departments and Units as well as labor and inventory transactions.

On the Company Definition frame, you can set up a validated account segment list so that when a new account code is created, the user must enter it in a valid format.

In most cases, you will want to use your organization's existing chart of accounts as the basis for direct account codes. This is particularly true if you are using FleetFocus™ M5's billing module. One Direct Account Code is preloaded in M5.

Indirect Accounts

Module(s): Asset Management, Inventory Management, Work Flow Management, Employee Management



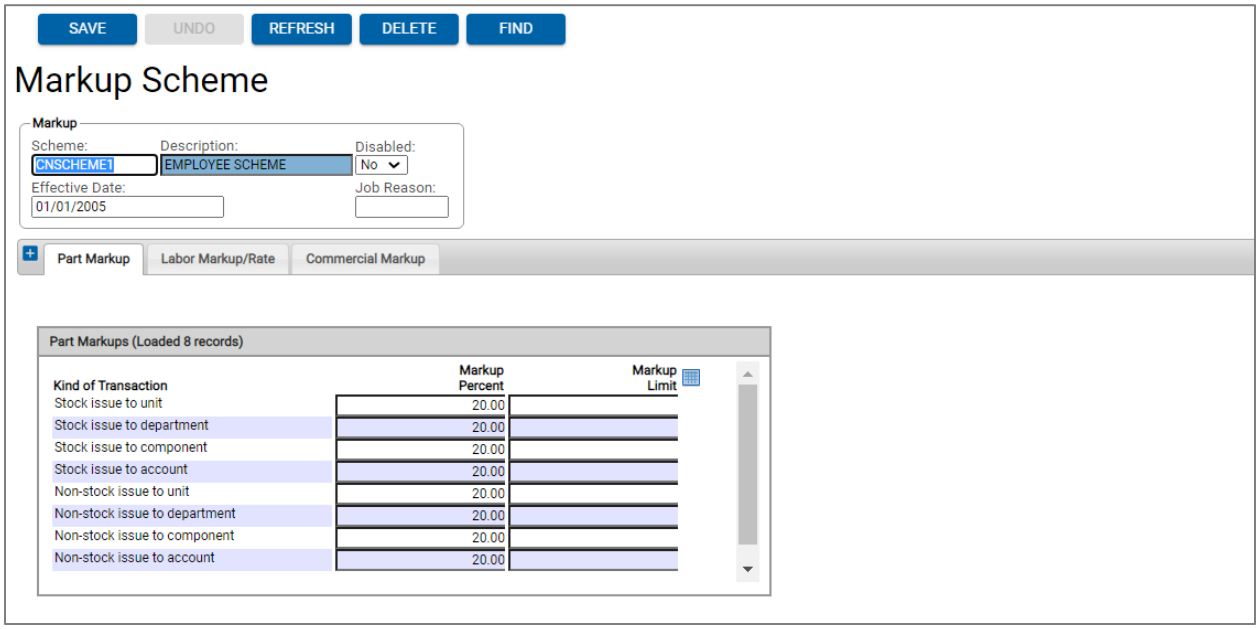
The Indirect Account Codes frame allows you to create and maintain codes to identify charges that cannot be charged directly against any revenue activities. These charges are usually considered overhead expenses.

For example, labor activities such as training, cleanup, unpaid time off or materials like shop brooms, towels, safety glasses, cleaning supplies. Lost dollars as a result of negative inventory variance or loss of fuel can be accounted for using indirect account codes. One Direct Account Code is preloaded in M5.

Markup and Tax Schemes

Markup Scheme

Module(s): Asset Management, Inventory Management, Work Flow Management, Employee Management



A markup scheme is a list of markup percentages, markup limits, and labor rates that apply to each kind of transaction.

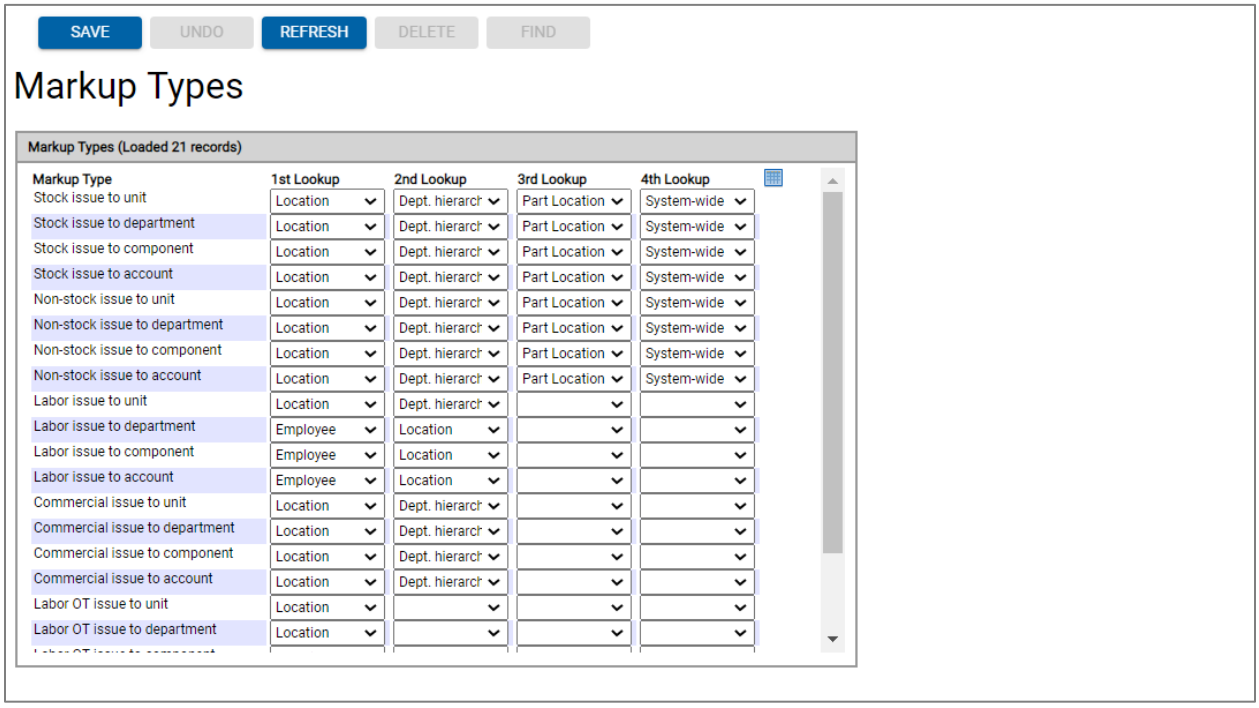
The setup frame consists of three tabs: Part Markup, Labor Markup/Rate and Commercial Markup. Leaving the markup percent blank means that the markup will come from some higher level of default. Each type of a commercial charge has its own markup percentage. The percentages must allow for at least three places after the decimal point.

Markup schemes have an effective date, and clients can change any iteration of a markup scheme, even if the effective date has passed. New iterations of a markup scheme can be create with future dates, though the user is warned if the entered date is more than one year in the future.

By design, the very first iteration of a markup scheme has an effective date of 01/01/2000. If you have created a markup scheme with more than one effective date, you may use your right mouse button to invoke the list of available effective dates per your markup scheme.

Markup Types

Module(s): Used in Modules: Asset Management, Inventory Management, Work Flow Management, Employee Management



A markup can be determined based on a variety of markup sources, and those sources depend on the kind of transaction. The client decides on the sequence of defaults (lookups) for each kind of markup. Therefore, the part markups, the user could opt for the first default to be "part commodity", the second default to be "dept. hierarchy", but if blank, then "location", but if blank then system-wide".

For labor rates, the client could decide "employee" as the first default, but if blank then "location", but if blank then "dept. hierarchy". M5 will search for markup schemes at each level of default until a markup scheme is found with a markup value.

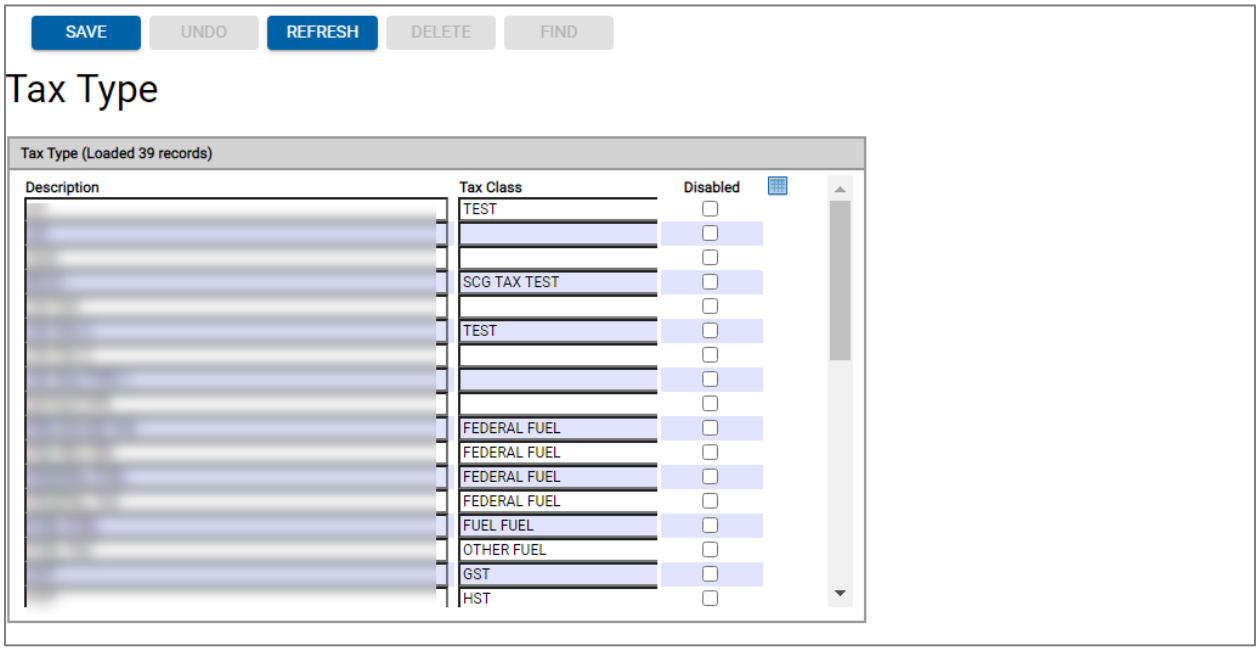
The options for markup types are:

- Location
- System-wide
- Part Commodity
- Unit
- Dept. Hierarchy (depends on system flag)
- Employee

The client may use each markup source only once per line. If an entire row is left blank, that kind of transaction has no markup. Each field provides a dropdown menu selection, but only those markup sources valid for a given kind of transaction will appear. At installation, the default (1st Lookup) for every transaction is "Location".

Tax Type

Module(s): Asset Management, Inventory Management, Work Flow Management, Employee Management

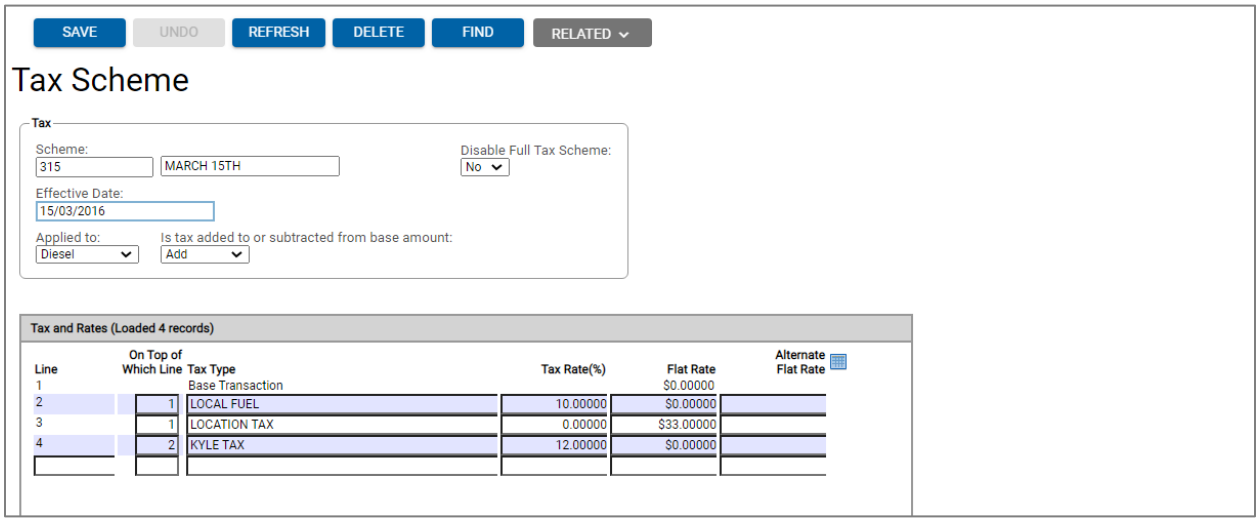


This frame is used to create and maintain a list of user-defined Tax Types to be assigned to Tax Schemes to help track and apply the various type of taxes involved with fleet maintenance for your organization.

A tax type is a description to identify a kind of tax and the recipient of the tax. A client might set up "INDIANA" to represent the Indiana State Sales tax and would identify the recipient as Indiana.

Tax Scheme

Module(s): Asset Management, Inventory Management, Work Flow Management, Employee Management



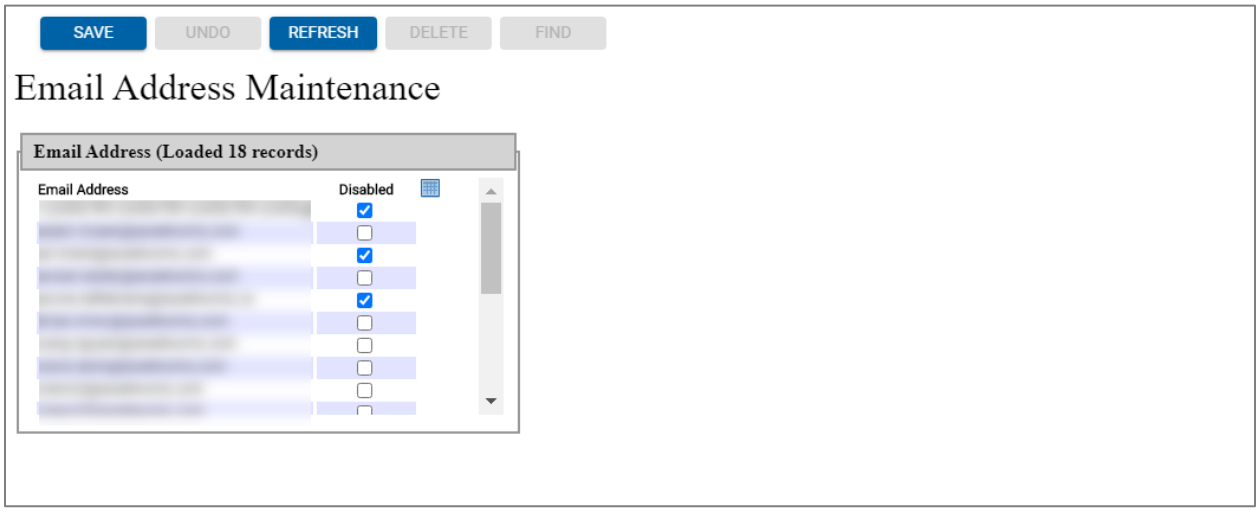
A tax scheme is a code plus a list of tax types, with instructions on how the taxes are applied, plus the rates that apply to each kind of transaction. A warning message will appear if the user chooses to enter an effective date that is more than one year in future

After your schemes are created you will use them on different frames, depending on the product or labor configured in the scheme. Labor tax comes from Location Main for the Job Location. Part Receives and Nonstock Parts issued on the fly come from Vendor Main. Stock Part Issues come from Location Main. Fuel Issues get their tax from Location Main for in-house issues, and Vendor Main for commercial issues.

System Flags related to Tax Schemes are: 5345, 5346, 5347, 5348, 5349 and 1111.

Email Address Maintenance

Module(s): Employee Management



This frame allows you to create a list of valid email addresses for use throughout the M5 System. If System Flag 5249 is set to 'Y', only email addresses listed here will be valid on the various frames in M5.

M5 System Administration

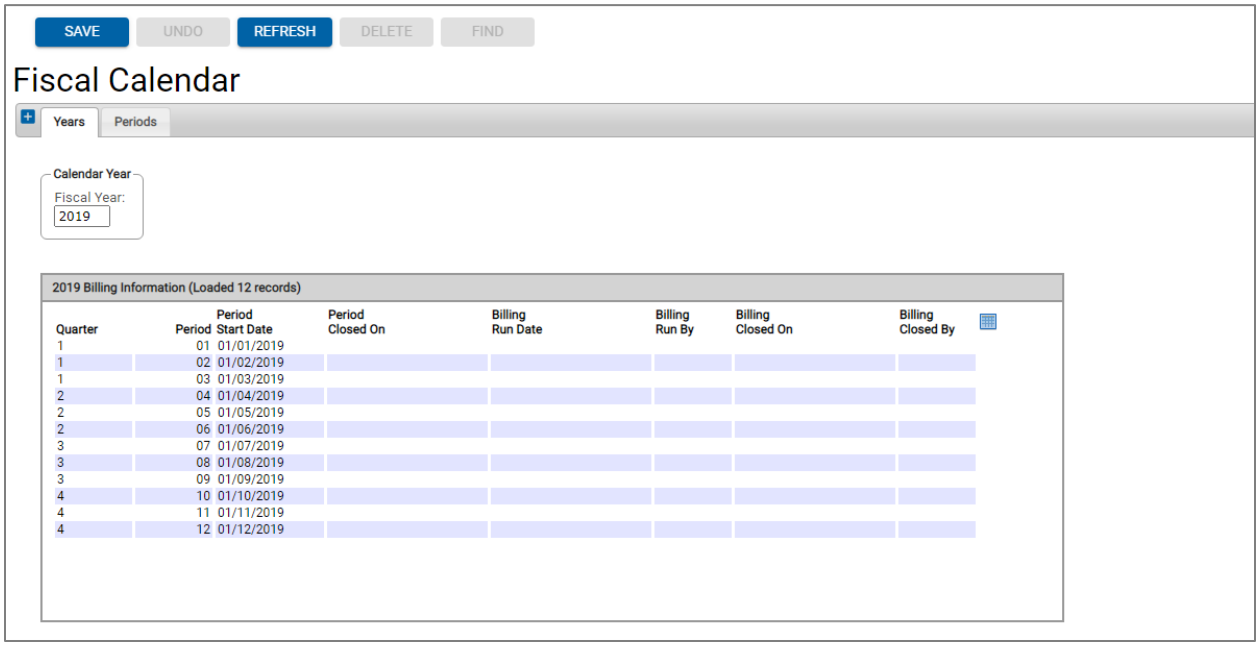
A detailed description of these codes can be found in the *System Administration Application User Training* guide.

M5 System Settings

There are a number of codes that relate to the overall M5 functionality.

Fiscal Calendar

Module(s): System Admin, Billing

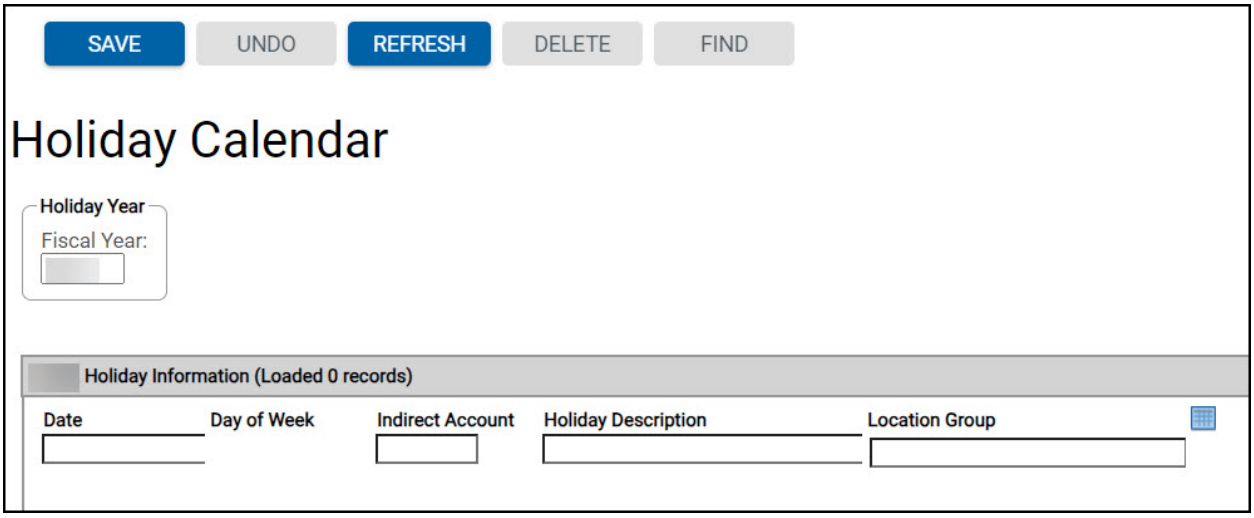


The Fiscal Calendar frame is used to set up your organization's financial calendars. This is a crucial part of the system as it defines the periods within the fiscal year used for billing, usage, and reporting information.

You must define a fiscal calendar before you can account for revenue and expenses, run end-of-period and billing, creating budgets or enter company holidays on the Holiday Calendar frame. The fiscal calendar must be set for each year prior to the first fiscal period.

Holiday Calendar

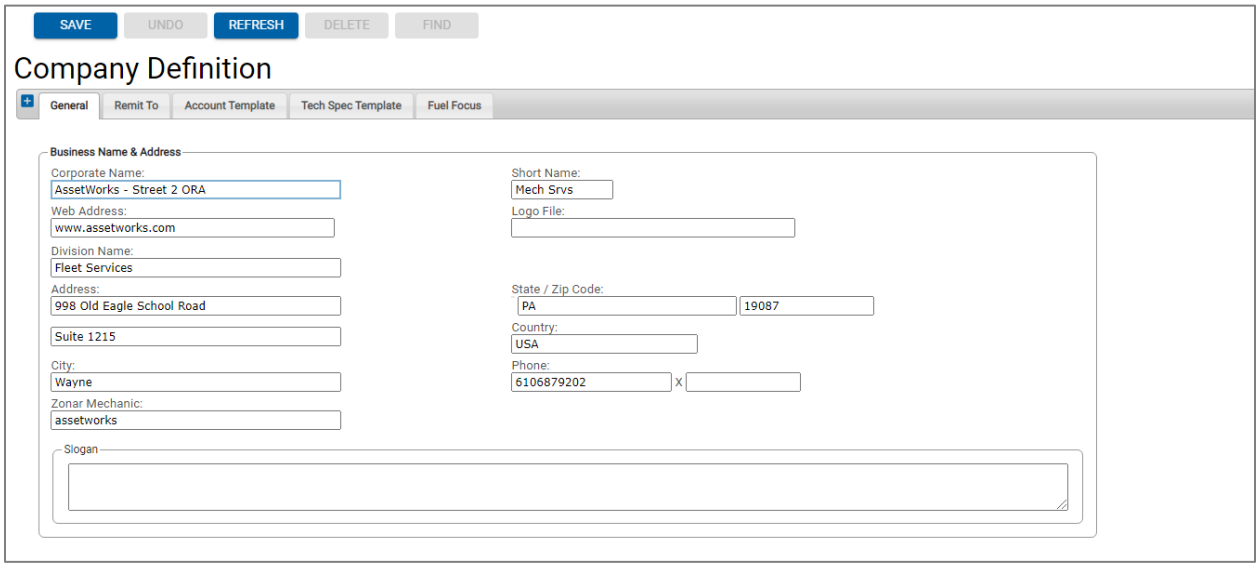
Module(s): System Admin, Employee Management



The Holiday Calendar frame allows you to designate days that are Company Holidays on the Fiscal Calendar. Various Employee Modules refer to these days for payroll processing.

Company Definition

Module(s): System Admin

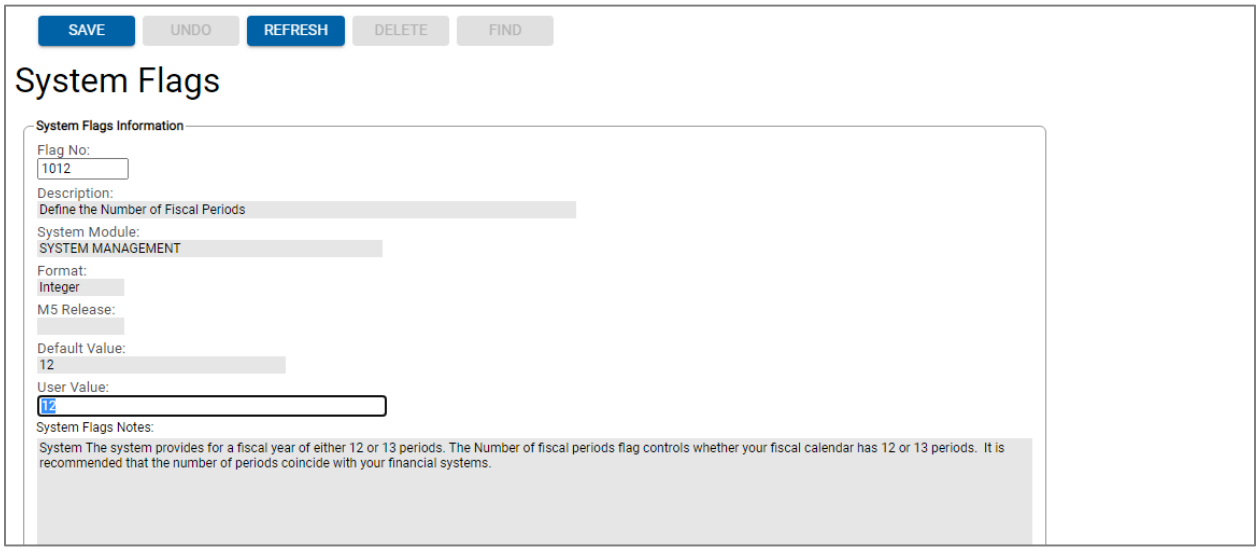


The Company Definition frame contains address and other pertinent information used when printing reports or “invoices” and when displaying header information on company documents generated by FleetFocus™ M5.

An accounting template and or tech spec structure can also be set up as needed.
System Flag 5268 must be set to Y in order to use the tech spec template.

System Flags

Module(s): System Admin



A number of modules have flags you can set to control how FleetFocus™ M5 operates. Each flag has a default setting and must be reviewed for changes. The System Flags must be carefully reviewed with the project team and careful decisions made on the nature of the flags to provide accurate functionality of the system to the users.

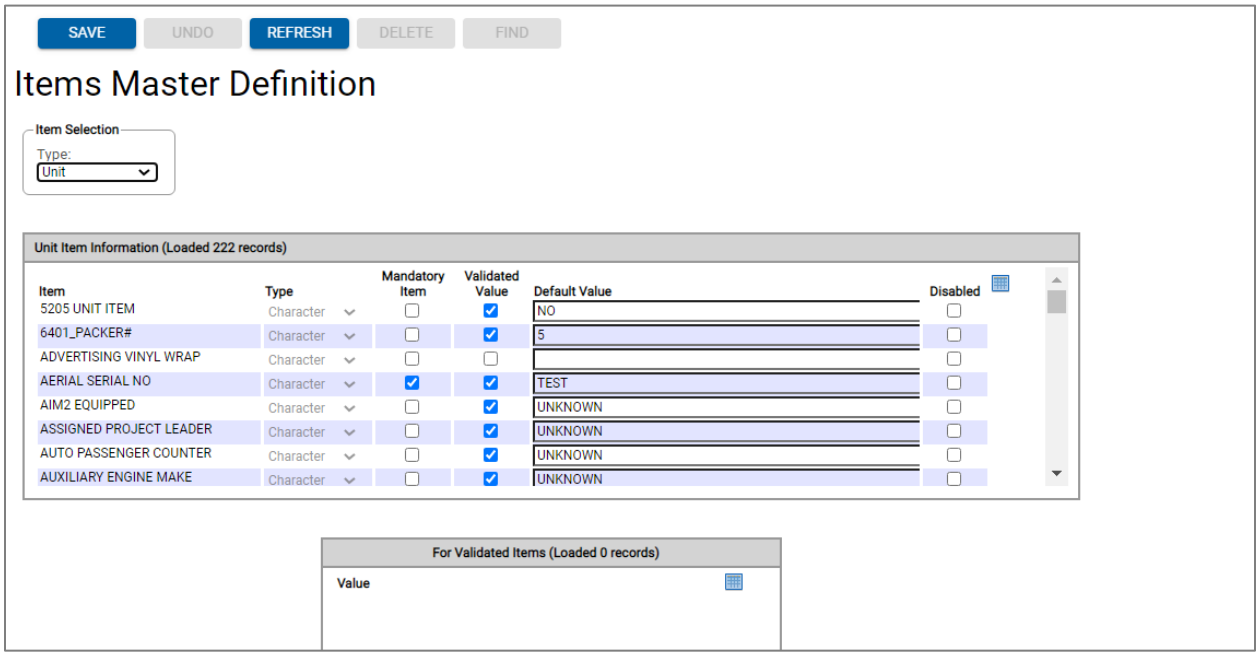
The training and project management team from AssetWorks will make recommendations based on common business practices.

The system flags can be changed at any time during implementation and in the future if needed, however some flags are hard coded and serious consideration and planning must be done before making any changes.

There are also a few system flags that cannot be changed once transactions have commenced, such as those flags that indicate how to cost or price things.

Item Master Definition

Modules(s): All



The Item Master Definition frame can be used to create and maintain a list of data items that can be assigned to M5 system records on the various Item frames for a wide range of entities.

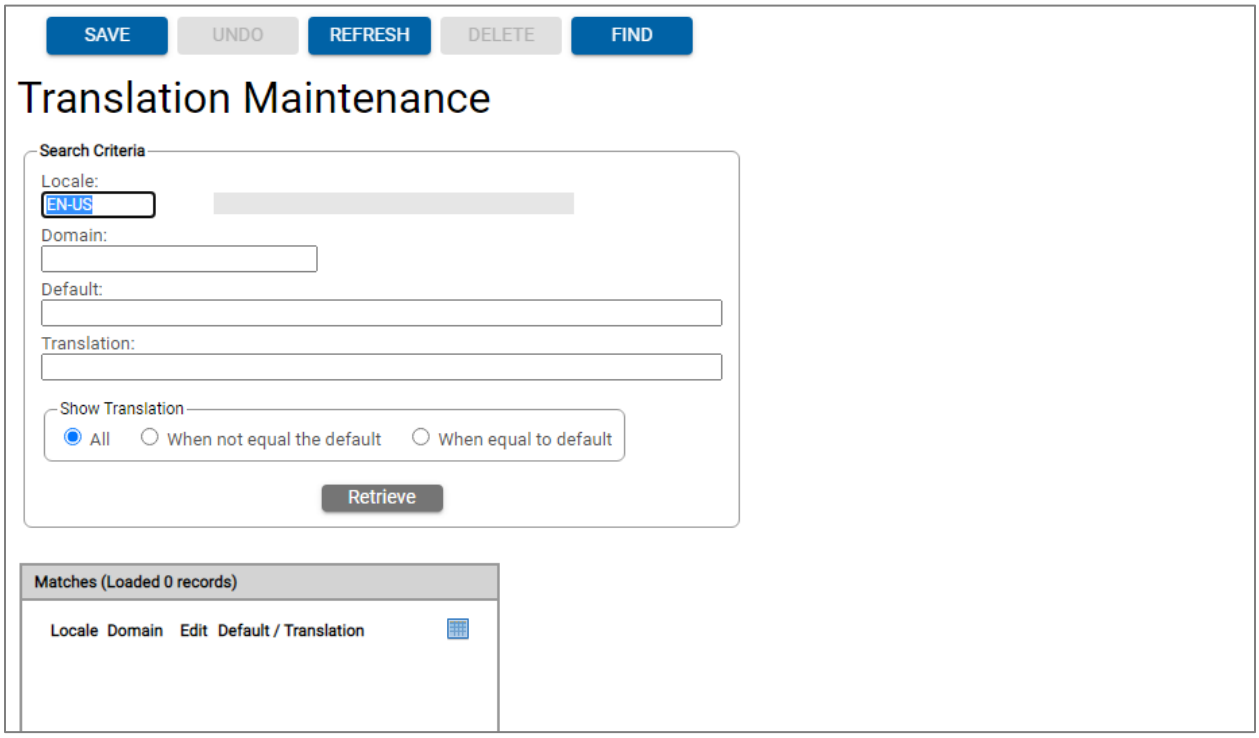
These entities include: Accident, Category, Component, Contract, Department, Driver, Employee, Incident, Location, Motor Pool, Part, Purchase Order, Tech Spec, Unit, Vendor, Work Order.

You can require specific information for these data items that must be entered and will be validated by the system.

For example, when creating a new employee profile on Employee Main, you can make the entry of an internal employee code mandatory. You would define this internal employee code here on this frame as an Employee Item.

Translation Maintenance

Module(s): System Admin



The Translation Maintenance frame is used to change the field descriptions on programs. This functionality gives our customers the ability to customize the system using existing terminology instead of using standard FleetFocus™ M5 terminology such as unit or department. An example would be our term for department might be cost center for your organization.

State Codes

Module(s): System Admin

The State Codes frame is used to create and maintain a list of State Codes that are associated with a Country Code. M5 is delivered with the state codes for both the United States and Canada already set up. State and Country Codes are used throughout the system as a part of location and addressing functions.

Time Interval

Module(s): System Admin

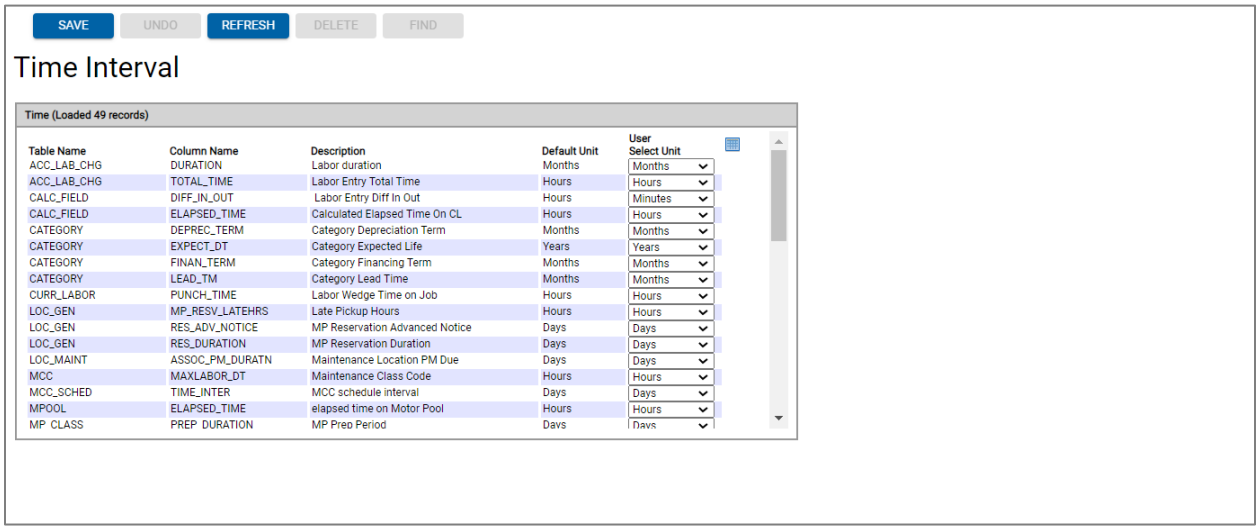


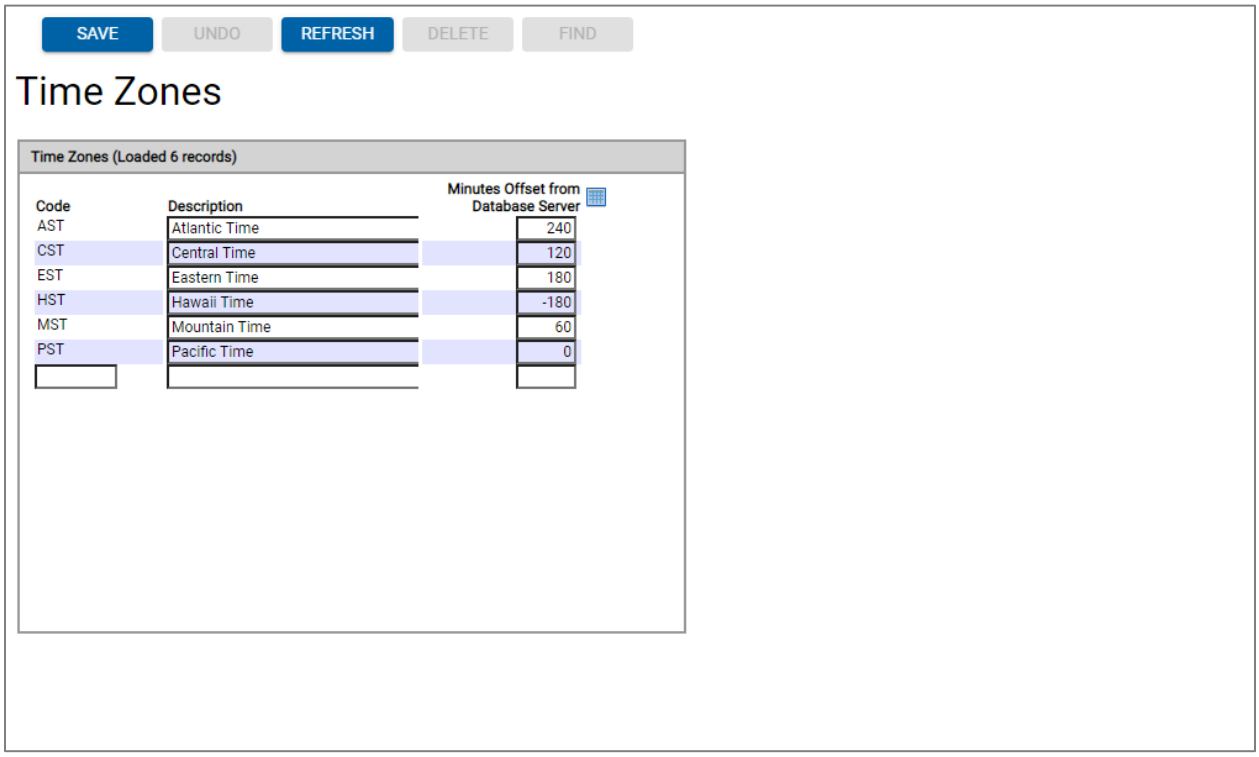
Table Name	Column Name	Description	Default Unit	User Select Unit
ACC_LAB_CHG	DURATION	Labor duration	Months	Months
ACC_LAB_CHG	TOTAL_TIME	Labor Entry Total Time	Hours	Hours
CALC_FIELD	DIFF_IN_OUT	Labor Entry Diff In Out	Hours	Minutes
CALC_FIELD	ELAPSED_TIME	Calculated Elapsed Time On CL	Hours	Hours
CATEGORY	DEPREC_TERM	Category Depreciation Term	Months	Months
CATEGORY	EXPECT_DT	Category Expected Life	Years	Years
CATEGORY	FINAN_TERM	Category Financing Term	Months	Months
CATEGORY	LEAD_TM	Category Lead Time	Months	Months
CURR_LABOR	PUNCH_TIME	Labor Wedge Time on Job	Hours	Hours
LOC_GEN	MP_RESV_LATEHRS	Late Pickup Hours	Hours	Hours
LOC_GEN	RES_ADV_NOTICE	MP Reservation Advanced Notice	Days	Days
LOC_GEN	RES_DURATION	MP Reservation Duration	Days	Days
LOC_MAINT	ASSOC_PM_DURATN	Maintenance Location PM Due	Days	Days
MCC	MAXLABOR_DT	Maintenance Class Code	Hours	Hours
MCC_SCHED	TIME_INTER	MCC schedule interval	Days	Days
MPOOL	ELAPSED_TIME	elapsed time on Motor Pool	Hours	Hours
MP_CLASS	PREP_DURATION	MP Prep Period	Days	Days

While time is managed in milliseconds in FleetFocus™ M5, the Time Interval frame is used to change how the time is displayed from various time fields throughout the system. Each table and column name is listed with a default unit.

The time unit may be changed using the selections provided. No entry is required here although the defaults should be reviewed. A specific example of why this is important is labor reporting for timekeeping.

Time Zones

Module(s): System Admin

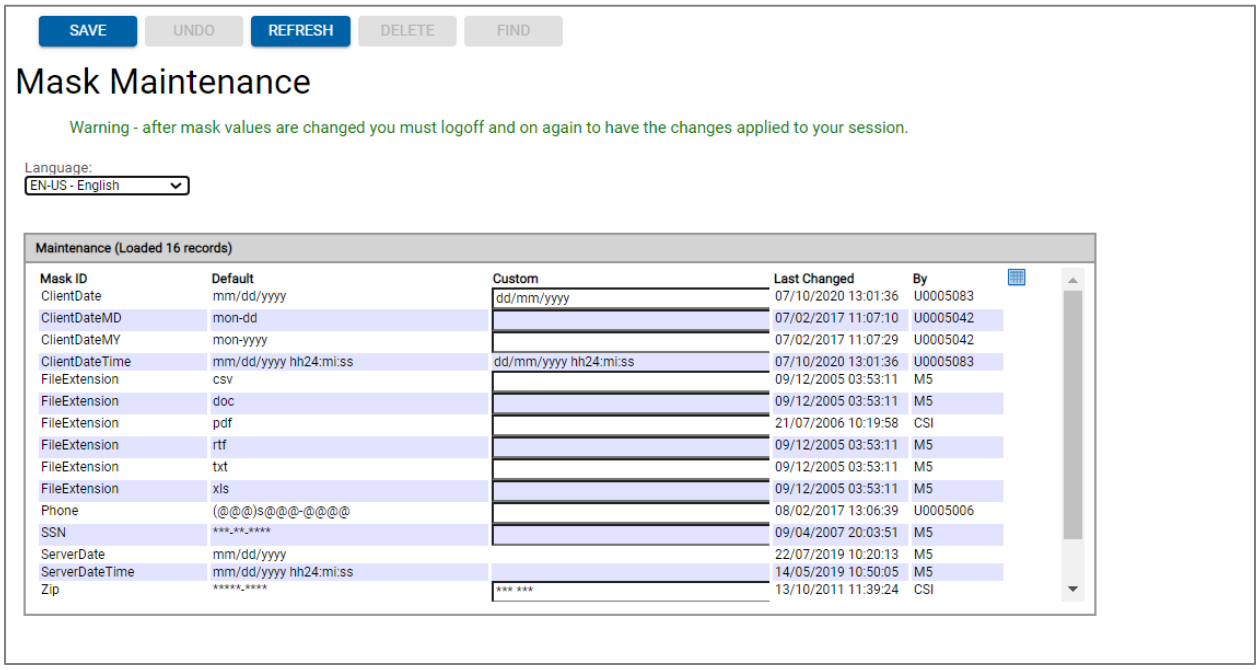


Time Zones are maintained in FleetFocus™ M5 to offset the time interval between the time zone of the client and the time zone of the database server.

This makes reporting on transactions more accurate. In the example above the database server is located in the Pacific Time Zone as illustrated by the fact that EST has an offset of 0 minutes. The time zones are assigned to locations in Location Main.

System Mask Maintenance

Module(s): System Admin



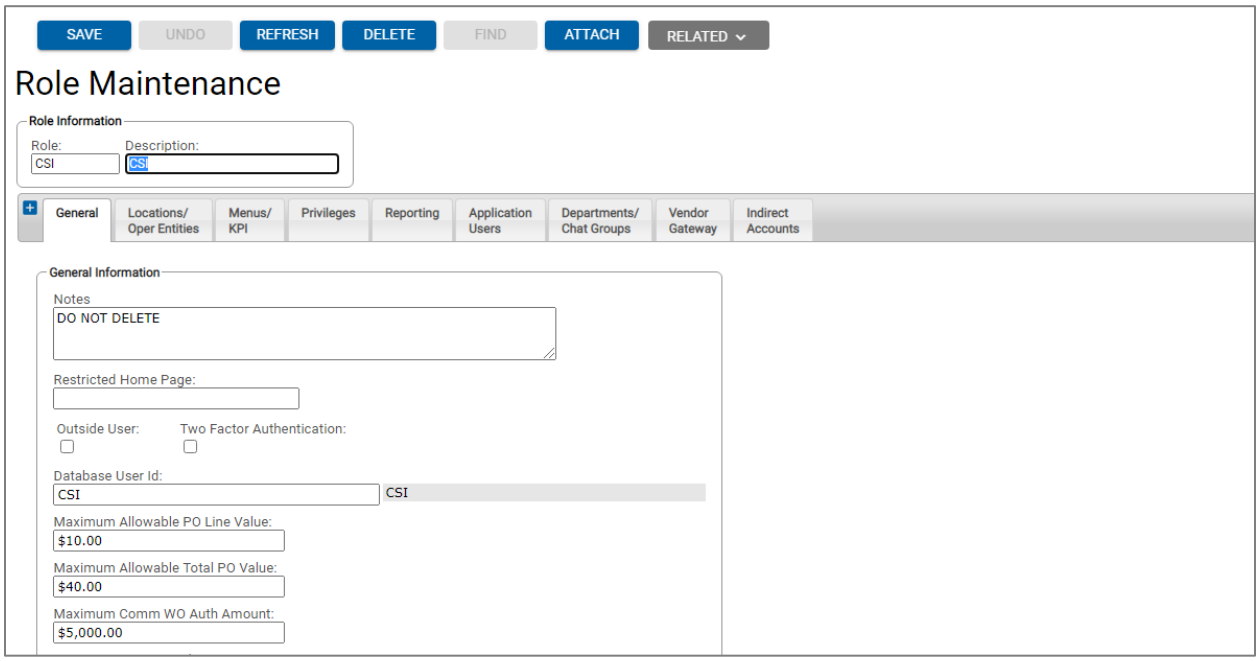
The System Mask Maintenance frame contains the formats for displaying time settings, date settings, currency, phone number, and address values on frames and reports (AssetWorks provides default settings, however, our customers located outside of the U.S. will need to configure these settings accordingly).

The most common change made in System Mask Maintenance is how the date is displayed. The Client Date Mask controls this display.

M5 System Security

Role Maintenance

Module(s): System Admin, Employee Management

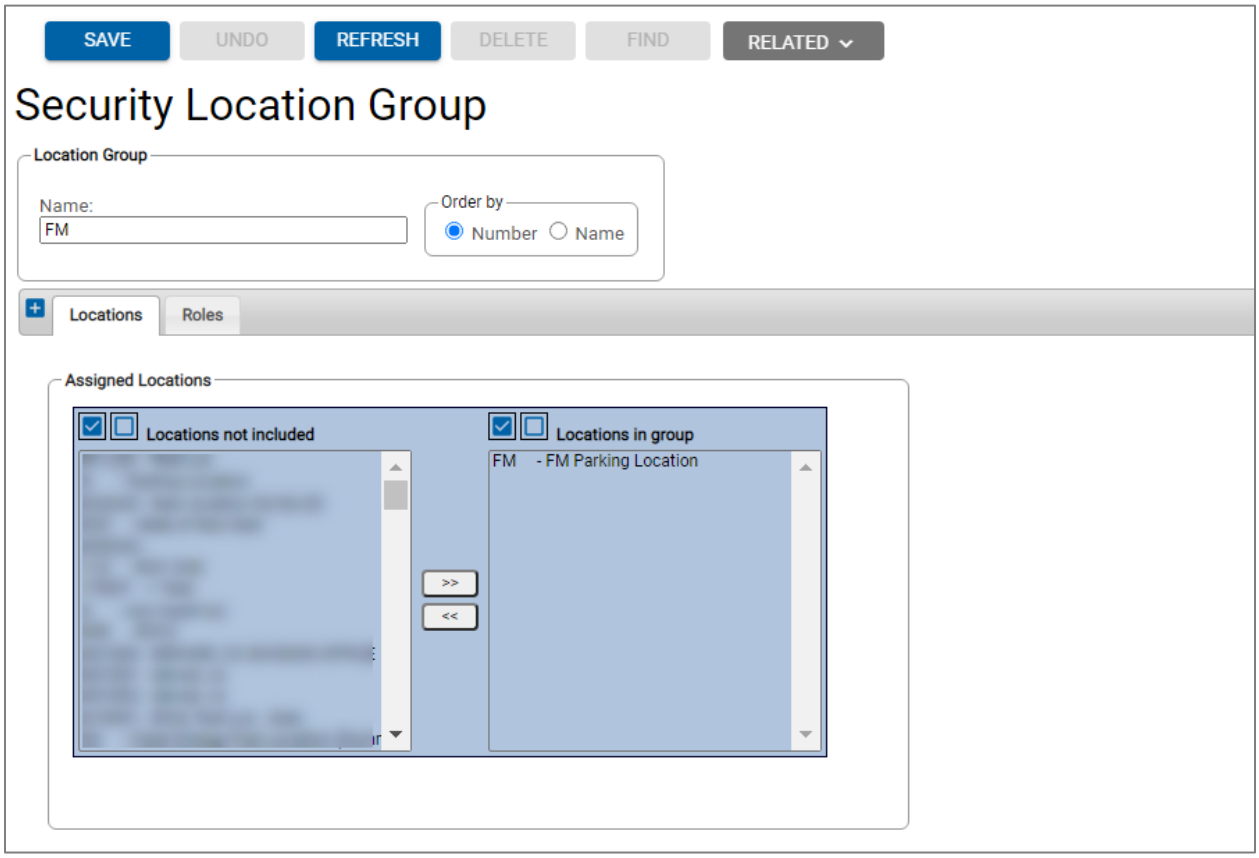


The Role Maintenance frame is where the System Administrator will create and maintain the Roles that assign the menus and privileges used for controlling access to your M5 System.

Roles are assigned to individual Application Users to determine what they can and cannot do or access within the M5 System.

Location Groups

Module(s): System Admin, Employee Management

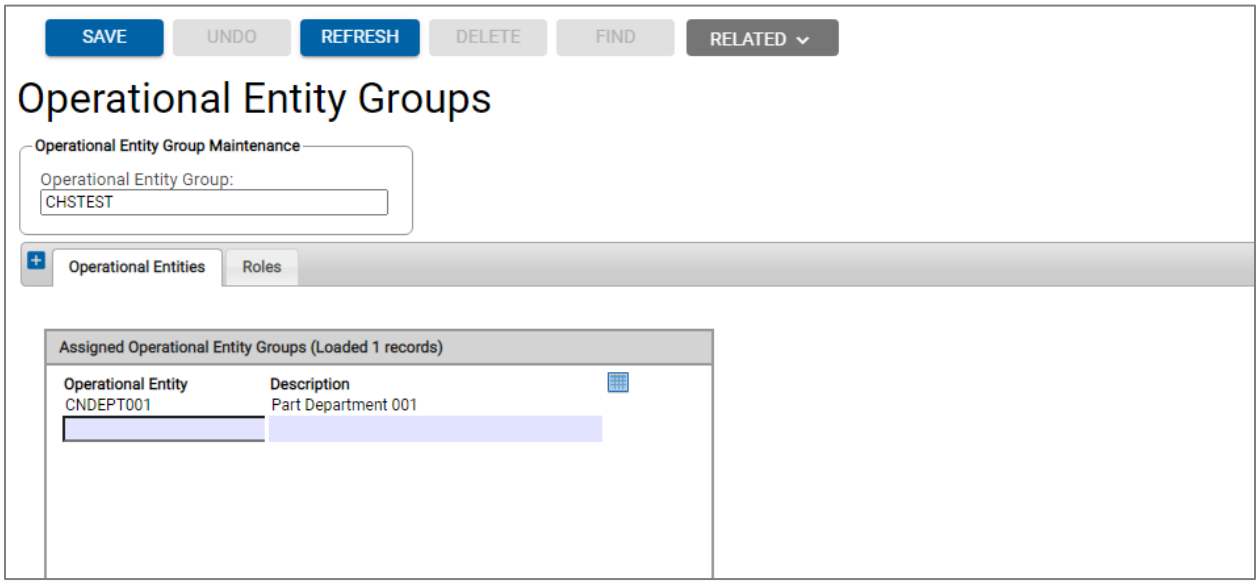


The Security Location Groups frame defines a group of locations. The Security Location Group is assigned to the role. If a location is added or deleted from the group, it becomes effective for all users within that group.

The location group should be created keeping in mind what functions the users will be allowed to do within each location. For example, Shop Managers may only be allowed access to certain locations.

Operational Entity Groups

Module(s): System Admin



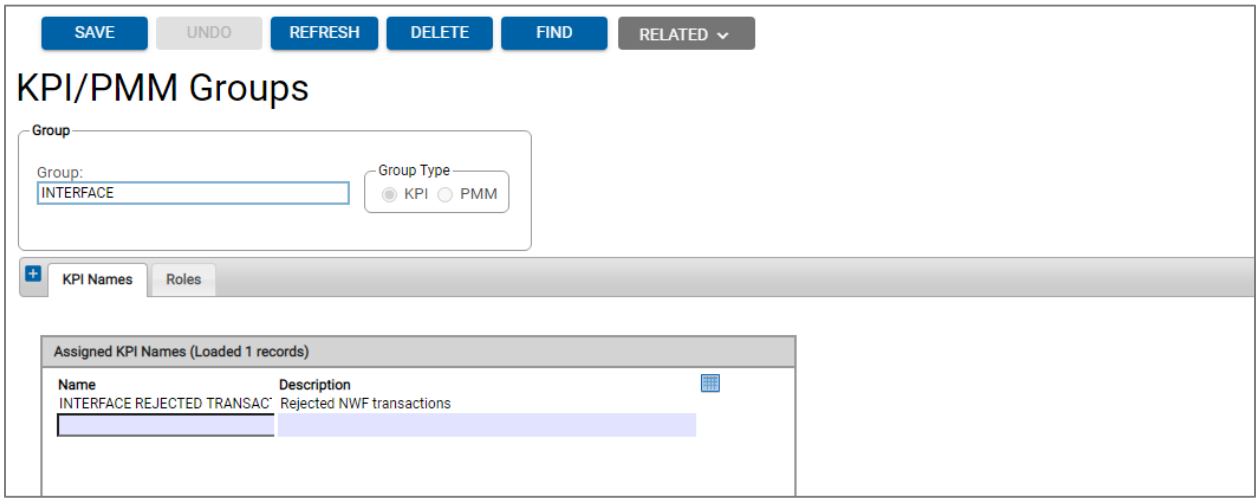
The Operational Entity Group frame allows you to create and maintain Operational Entity Groups to assign to user roles. They are used in much the same way as Location Groups (for example, for querying or reporting purposes and restricting user access). Operational Entity Groups are used in the Unit Availability module.

From this frame, you can also control access for entry of confirmation counts on Availability Unit Confirmation. In order to grant access for confirmation counts, you must assign an Operational Entity Group to the user's role.

Note: An "Operational Entity" is determined by the value of System Flag 2032 (using or owning department).

KPI/PMM Groups

Module(s): System Admin

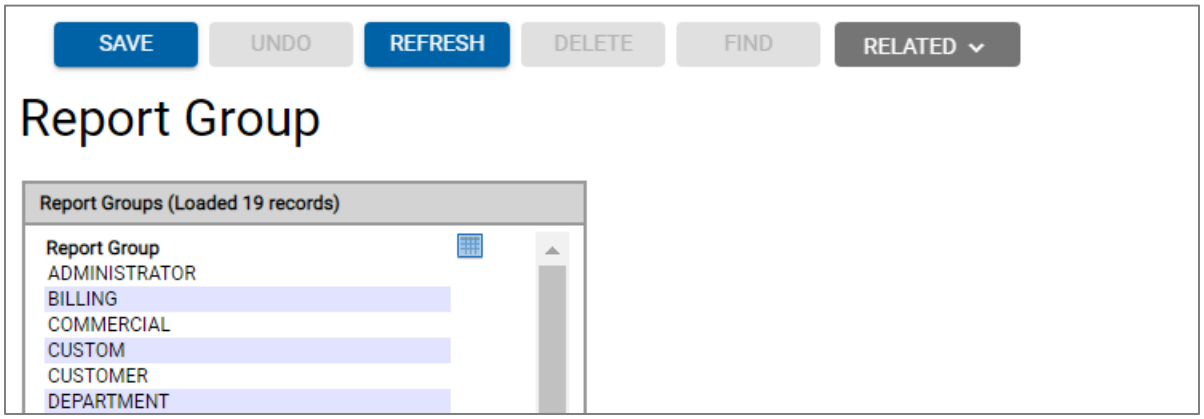


The KPI/PMM Groups frame allows you to create and maintain a set or group of similar Key Performance Indicators (KPI) and Performance Measure Monitors (PMM). After this group is created it can be assigned to an Application User's specific Role.

This is a helpful management tool for assigning KPI/PMM access to users with similar job functions. The Performance Measure Monitors are trend indicators and require an additional license.

Report Groups

Module(s): System Admin

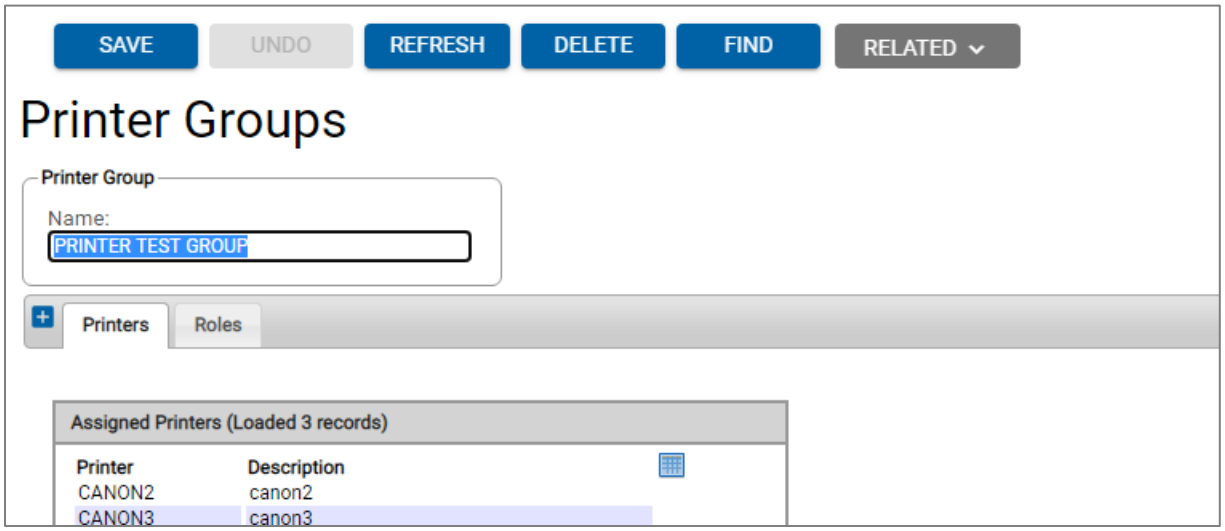


The Report Groups frame allows you to create groups for reporting purposes, specifically for scheduled reports produced for multiple users. Rather than each user running the report, M5 gives you the ability to schedule a report one time and have it pushed out for viewing to the designated report group.

After the report finishes running, a copy is stored in each user's Report Bin on their Home Page. The user running the report does have the option to keep the report private or to send to others.

Printer Groups

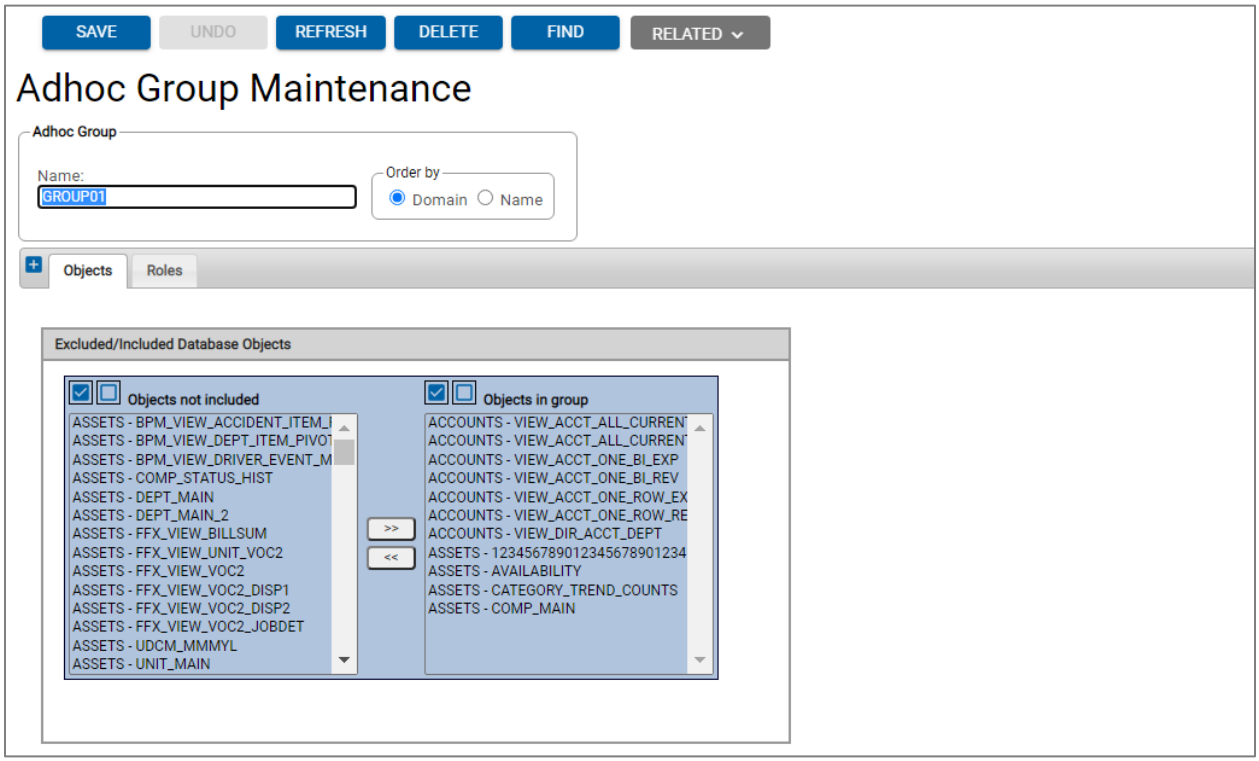
Module(s): System Admin



The Printer Groups frame gives you the ability to create and maintain sets or groups of printers for use in Crystal Reports. Each printer on the Printer Definition frame must be assigned to a Printer Group to be used in Crystal Enterprise.

Adhoc Group Maintenance

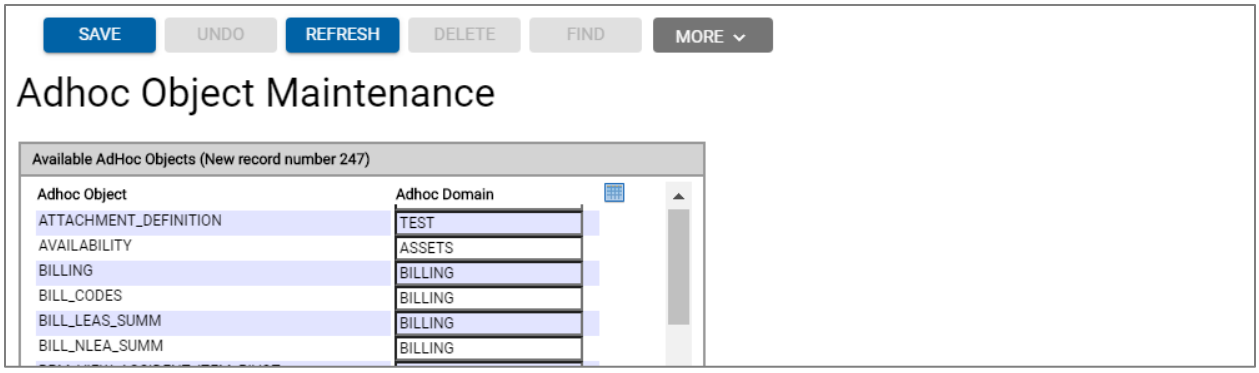
Module(s): System Admin



The Adhoc Group Maintenance frame defines which views the users can view and report on within the Adhoc Query reporting tool. After the Adhoc groups are defined, it can be added to the roles using the Roles tab on the Adhoc Group Maintenance frame.

Adhoc Object Maintenance

Module(s): System Admin

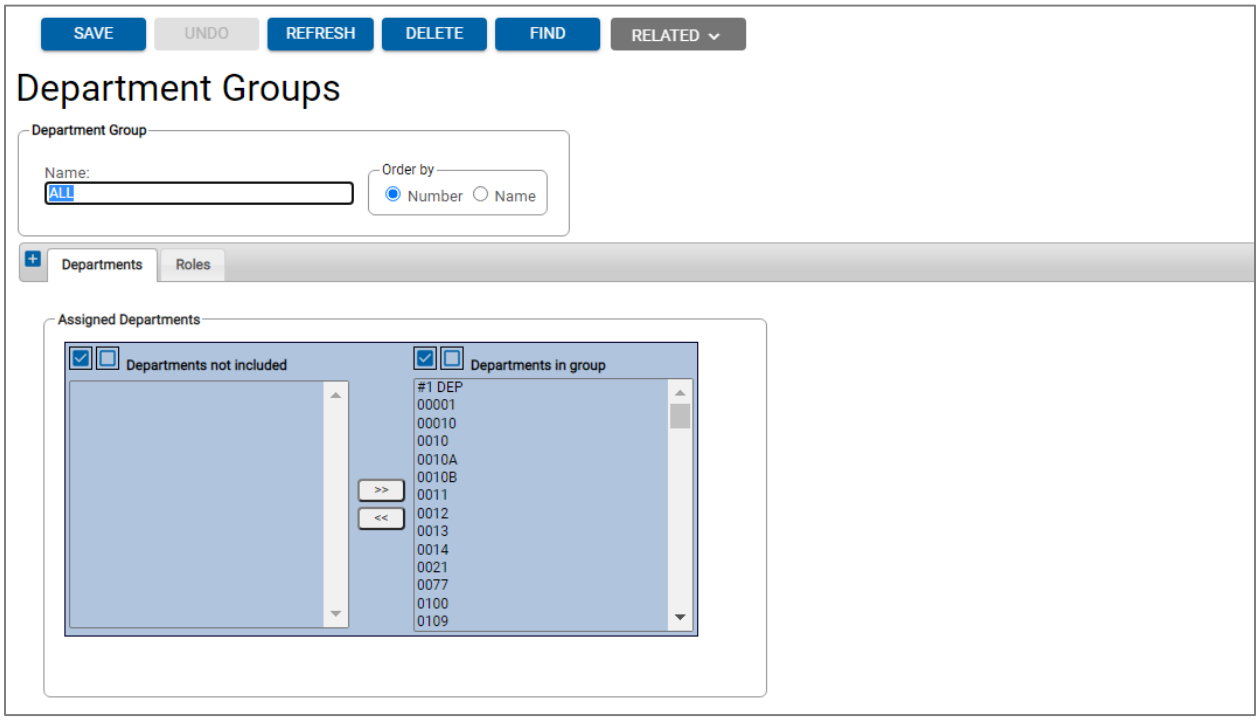


The Adhoc Object Maintenance frame is used to create and maintain the list of data sources for Adhoc Reporting. The data sources are a view of the M5 date, not the physical tables.

These AdHoc Objects can then by applied to Adhoc Groups to define which data sources the users can view and report on based on their role.

Department Groups

Module(s): System Admin

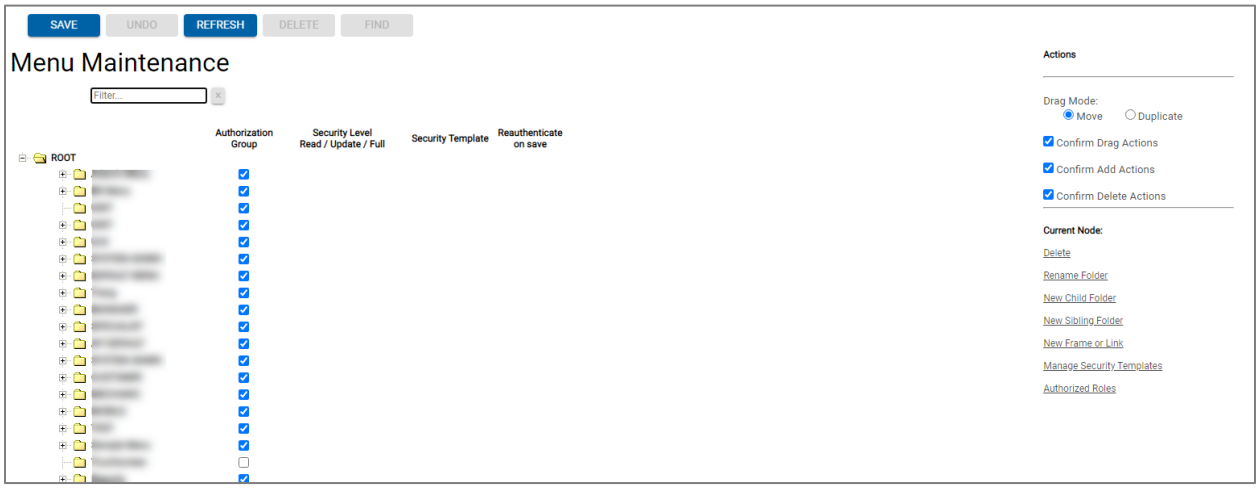


This frame allows you to create Department Groups to limit or restrict access to certain information or frames in M5. Department Groups allow for departments to be grouped together so that users can access each other's records.

If the department is not in a user's Department Group, the user will not be able to view Employees, Departments and Units that belong to that department. The User tab on this frame shows which database users are allowed to access the Department Group.

Menu Maintenance

Module(s): System Admin



The Menu Maintenance frame allows you to fully customize your user menus. Customizing menus in the M5 System allows your System Administrator to control which menu functions the application user can access.

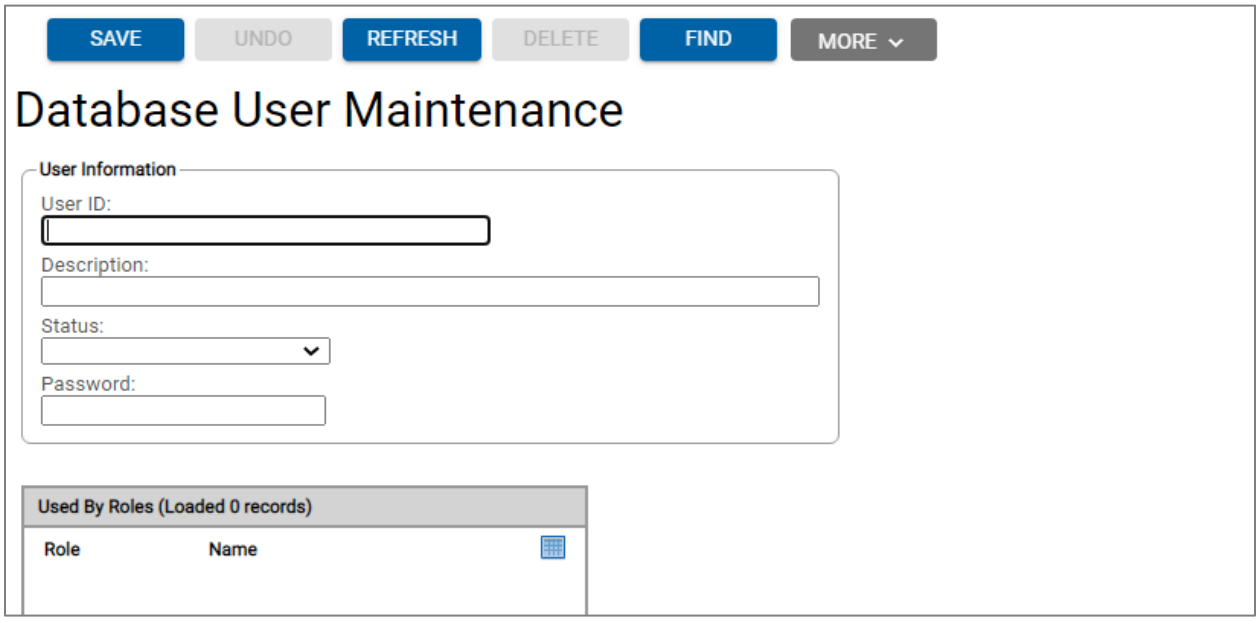
They can be limited to very specific fields within certain frames that display only the functionality needed by the application user to perform their job duties. This approach helps the user navigate efficiently through the system.

When you first implement your M5 System you will need to create your own menus. M5 comes with a Sample Menu for your reference.

Note: Do not modify the sample menu. It is there for your reference and it is a great resource. If you modify it, you will lose the references it contains.

Database User Maintenance

Module(s): System Admin



The Database User Maintenance frame allows you to create and maintain the Database Users that are necessary when using Oracle for the database with your M5 System. **Note:** SQL Server does not require these database users.

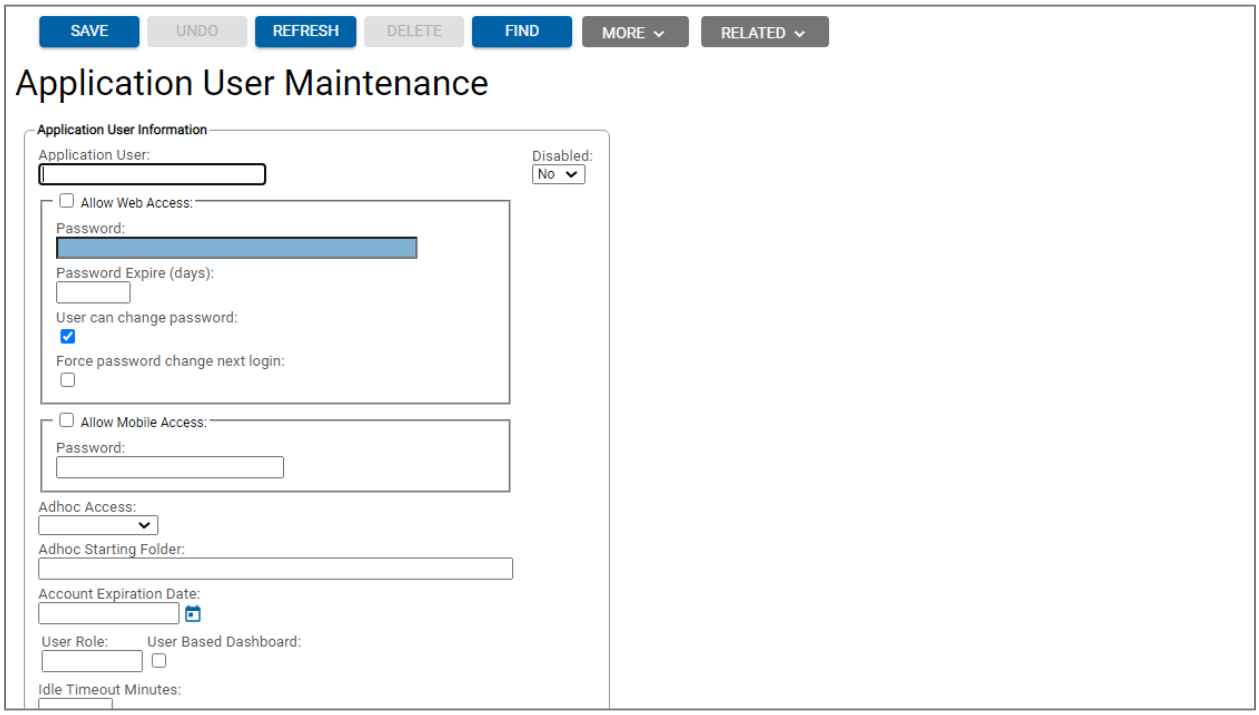
After created, you can assign database users to Application User Roles and multiple Roles can use the same database user ID. Using this approach will reduce the number of distinct database users you have to create and manage. This function is normally performed by your System Administrator.

As part of the implementation planning you should consult with your Oracle DBA and create database users that are consistent in style with the current database username structure.

Note: M5 is delivered with a database username of CSI already created. Do not modify or delete the CSI Database User. It is used for installing and configuring the M5 system.

Application User Maintenance

Module(s): System Admin



The Application User Maintenance frame allows you to create and manage the user accounts for the individuals who use the M5 System as a part of their job function within the fleet organization. It is important that System Administrators take the time to carefully define user capabilities and assign them accordingly.

Proper management and configuration of Application User IDs means controlling user access to the parts of the system they need to perform their jobs while preventing access to parts of the system that are not within the scope of their position. Through the Application User Maintenance frame, you can accomplish this by properly defining their roles and security rights.

The majority of the Application User's capabilities are "role-based." You can create and configure Application User Roles and edit privileges on the Role Maintenance frame. However, there are some additional items that you can customize at the user level after you create the Application User ID.

Department Access Function (DAF)

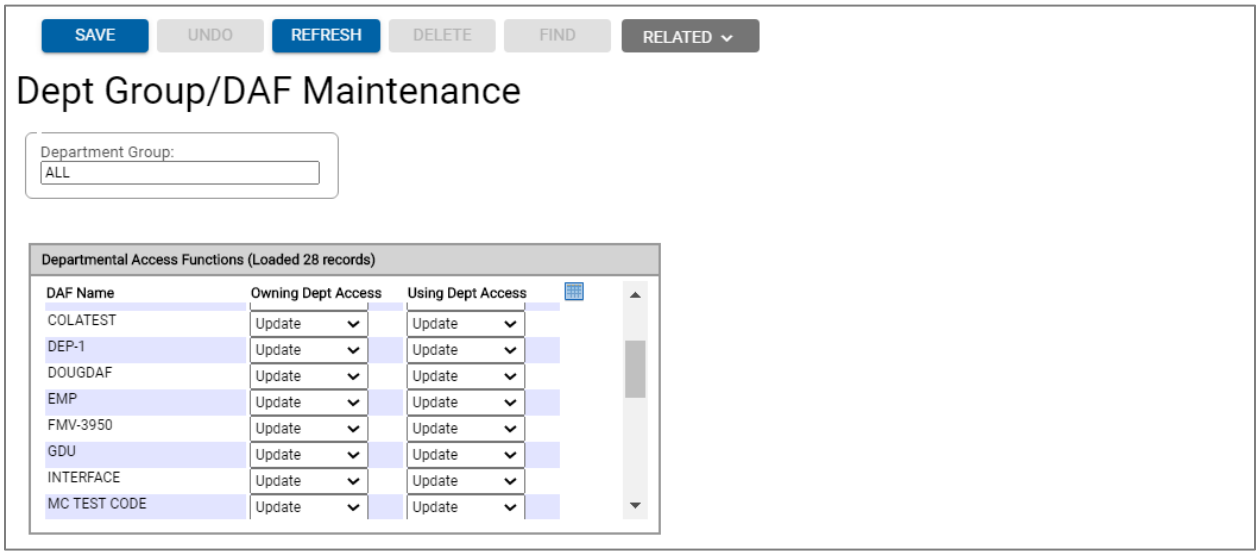
Module(s): System Admin

The DAF Code Maintenance frame allows you to create Department Access Function (DAF) codes to limit or restrict access to certain frames at the Department Level. After created, you can assign these codes to individual frames on Frame Maintenance.

For example, you might want to setup a code to give read-only access to a certain Department Group on Work Order Main.

Department Group/DAF Maintenance

Module(s): System Admin

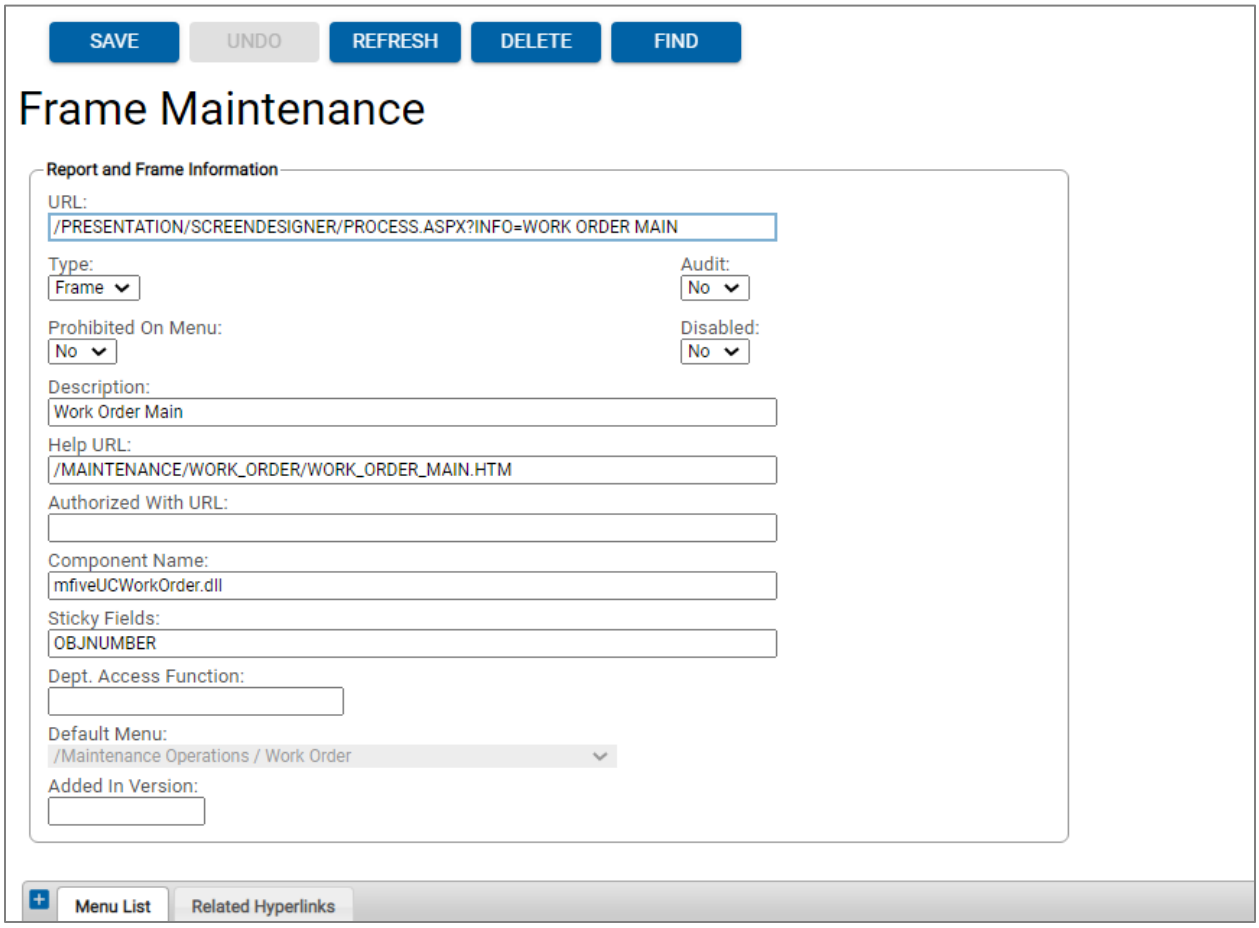


The Dept Group/DAF Maintenance frame allows you to set Owning Dept Access and Using Dept Access levels for each Department Group. The Departmental Access Function (DAF) codes are setup on the DAF Code Maintenance frame.

As an example, Dep-1 group may only have ‘update’ access to the using departments’ vehicles in their department group. Each Department Level Security code created will be listed and the choices for both Using and/or Owning departments are: update, read only, or none.

Frame Maintenance

Module(s): System Admin



This frame allows the System Administrator to change the description of a frame, report or link in the M5 system. It is also used to add new frames and reports. Normally the System Administrator will not need to make changes to this frame and it is recommended that these settings be left with the default values.

When M5 is upgraded for a patch or a new release, a process called Run M5 Objects updates the Frame Maintenance frame with all new frames and reports. There is an option in this Object update that restores the frame descriptions to the M5 default values.

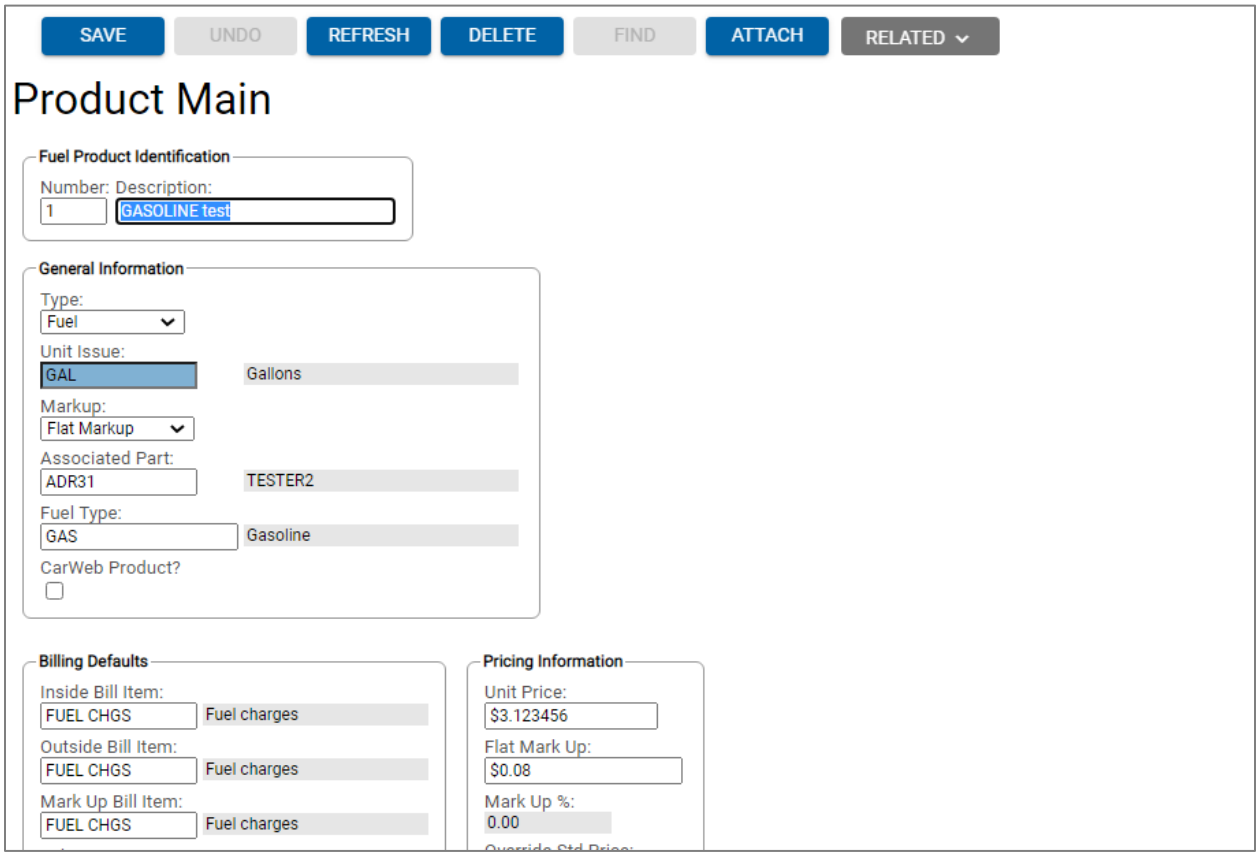
Additional M5 Module Configurations

Fuel Management

Please refer to the *Fuel Process User Guide* for a full description of the required configuration to use this functionality. The following frames represent the major areas to be configured.

Product Main

Module(s): Fuel Management, Inventory Management

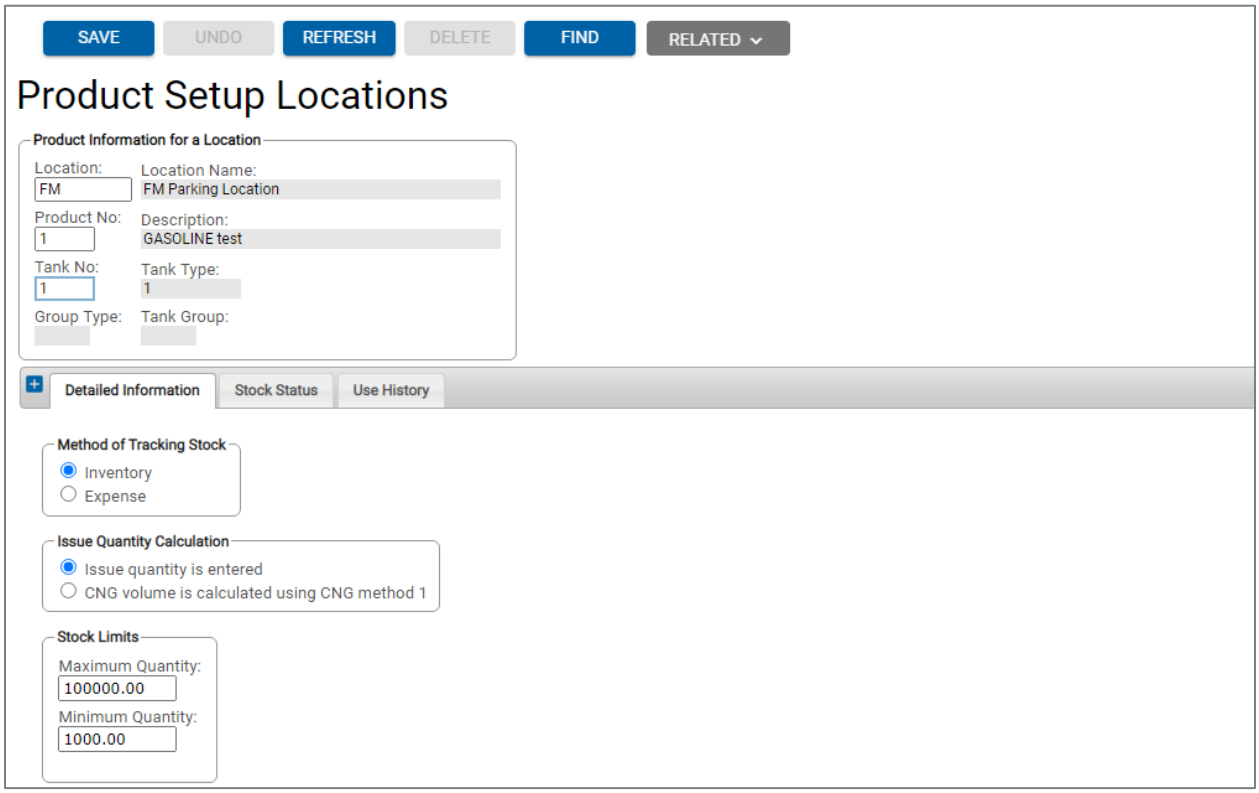


A consumable product is any substance used in the operation or maintenance of a vehicle. For example, gasoline, diesel fuel, oil, transmission fluid, and car wash and windshield wiper blades. You can manage your consumable products by tracking product information, including:

- The type of product.
- A description of the product.
- The unit price of the product.
- A flat markup amount (added to the inventory price).
- A percent markup amount (added to the inventory price).
- The unit of measure when the product is issued.

Product Setup Location

Module(s): Fuel Management, Inventory Management



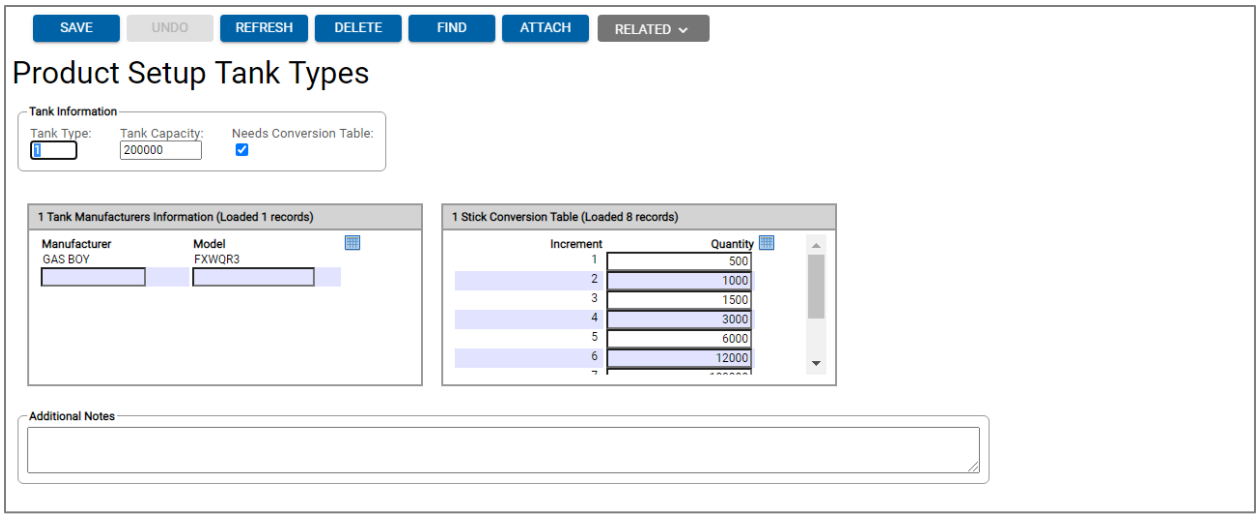
The Product Setup Locations frame allows you to create and maintain valid product lists for your designated fuel locations. Before storing or issuing fuel products from a location, you must first create and define the information for location products on this frame.

You can track the maximum and minimum quantity of product that can be stored and the minimum number of days before the product runs out.

If you choose to use M5 to maintain your consumable products inventory, products, tank types, tank information and hose information must be set up. Then the system automatically tracks the unit of issue, the inventory unit price, the on-hand quantity, the on-hand value and the on-order quantity. In addition, it tracks the date of the last order, receipt, issue, transfer and physical inventory.

Product Setup Tank Types

Module(s): Fuel Management, Inventory Management



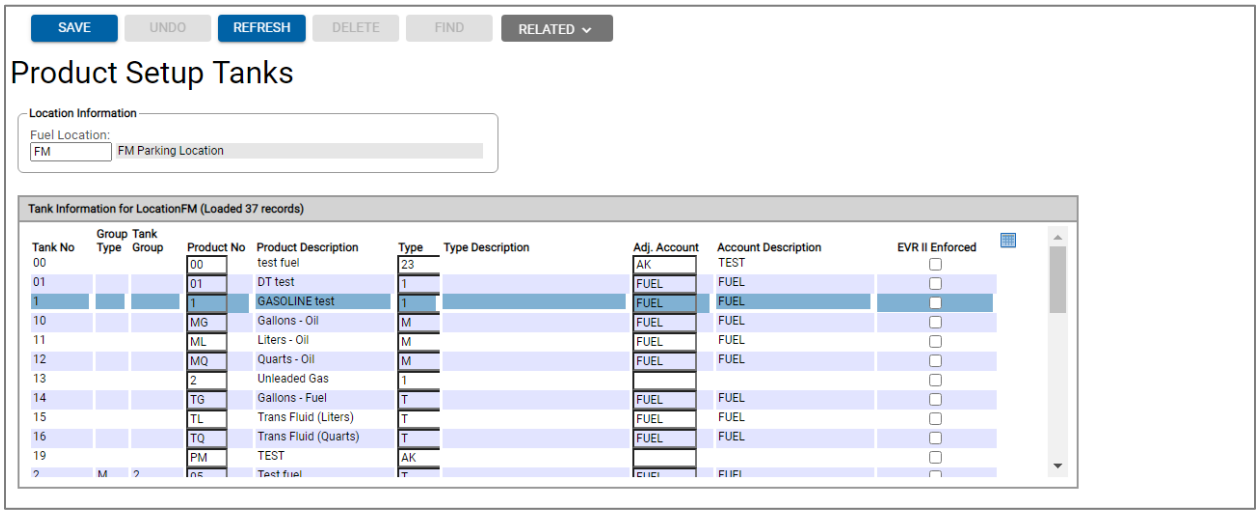
The Product Setup Tank Types frame allows you to create and maintain codes to identify and define the physical tanks that hold your fuel products.

Characteristics such as size, model number, and capacity are defined on this frame. You must setup tank types before you can associate products to individual tanks.

The Stick Conversion Table allows you to enter stick reading increments and corresponding values for the increments. For example, Increment 1 on the stick reading corresponds to a Quantity of 10, Increment 2 corresponds to a Quantity of 20 and so on.

Product Setup Tanks

Module(s): Fuel Management, Inventory Management



A fuel location is where vehicles obtain fuel and other consumable products. These consumable products may include gasoline, diesel fuel, oil, transmission fluid, and windshield wiper solution.

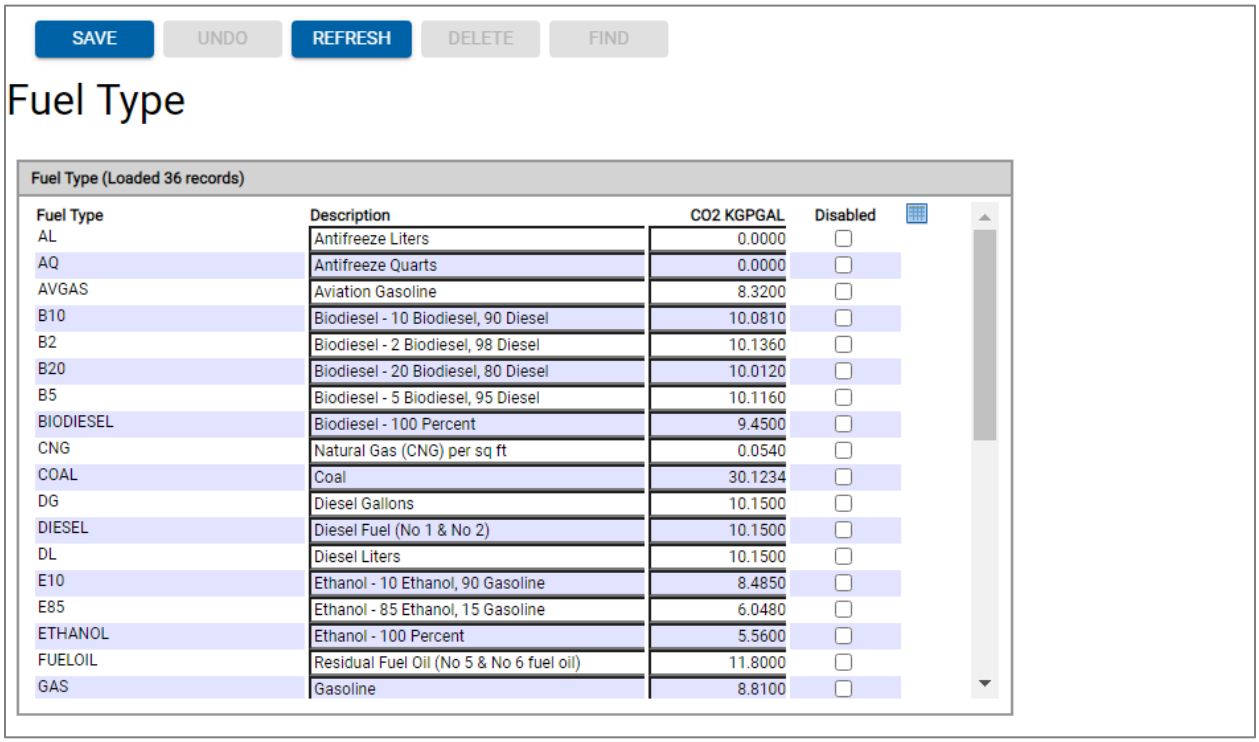
After your product information is added to the database, you can define tank numbers from which a hose draws fuel, a tank type for each tank at a specified location, the products which are stored in them, and the accounts to be charged.

You also can define hose numbers and specify whether a hose is available. In addition, you can define the number of pulses per unit of fuel, which is used to calculate the actual amount of fuel dispensed for a given transaction.

EVR II Enforced indicates Enhanced Vapor Recovery status on the tank, select the checkbox if this is to be enforced on a particular tank.

Fuel Types

Module(s): Fuel Management



Fuel Type	Description	CO2 KGPGAL	Disabled
AL	Antifreeze Liters	0.0000	
AQ	Antifreeze Quarts	0.0000	
AVGAS	Aviation Gasoline	8.3200	
B10	Biodiesel - 10 Biodiesel, 90 Diesel	10.0810	
B2	Biodiesel - 2 Biodiesel, 98 Diesel	10.1360	
B20	Biodiesel - 20 Biodiesel, 80 Diesel	10.0120	
B5	Biodiesel - 5 Biodiesel, 95 Diesel	10.1160	
BIODIESEL	Biodiesel - 100 Percent	9.4500	
CNG	Natural Gas (CNG) per sq ft	0.0540	
COAL	Coal	30.1234	
DG	Diesel Gallons	10.1500	
DIESEL	Diesel Fuel (No 1 & No 2)	10.1500	
DL	Diesel Liters	10.1500	
E10	Ethanol - 10 Ethanol, 90 Gasoline	8.4850	
E85	Ethanol - 85 Ethanol, 15 Gasoline	6.0480	
ETHANOL	Ethanol - 100 Percent	5.5600	
FUELOIL	Residual Fuel Oil (No 5 & No 6 fuel oil)	11.8000	
GAS	Gasoline	8.8100	

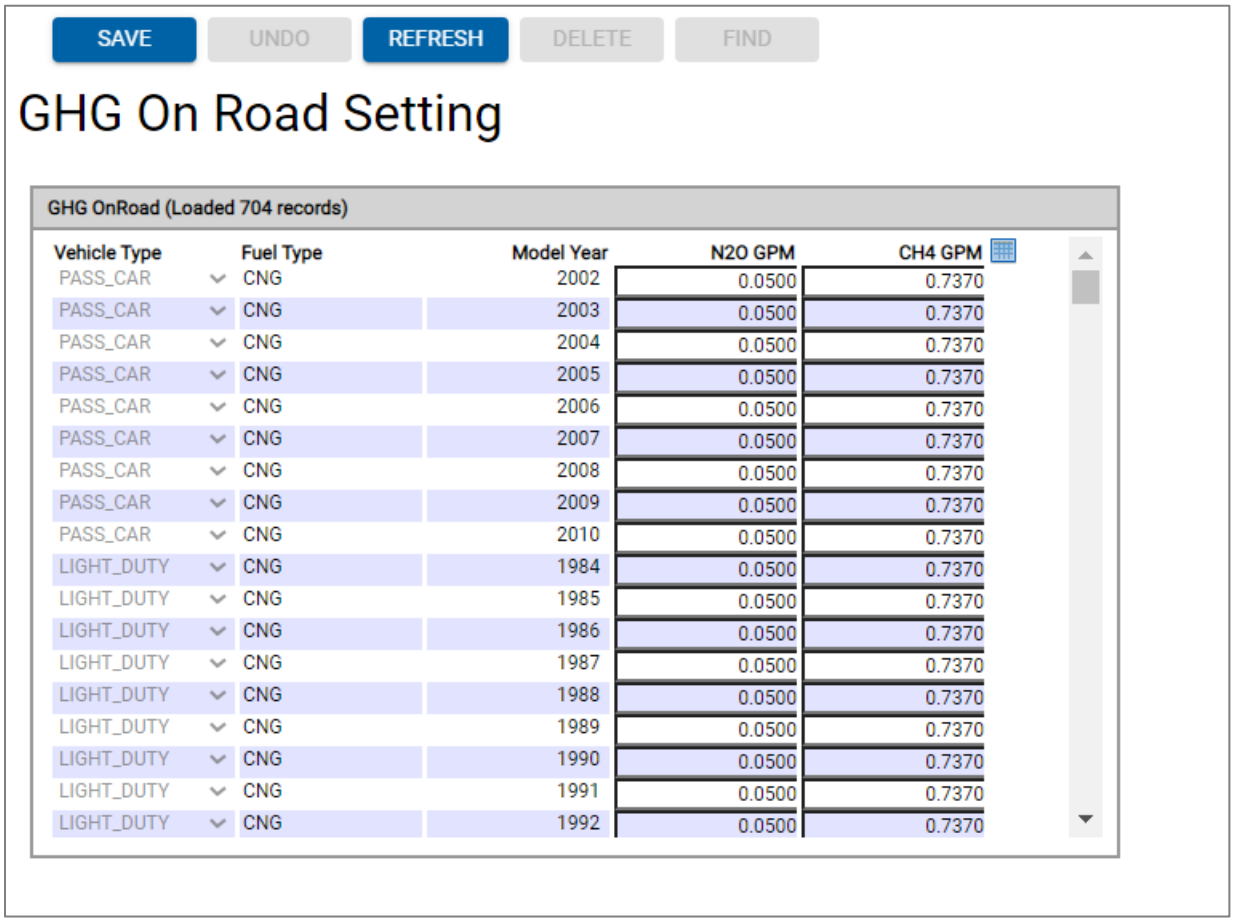
The Fuel Type frame allows you to create and maintain the list of fuel types defined by the Environmental Protection Agency (EPA) and other international agencies.

AssetWorks delivers this frame loaded with the default CO2 KGPGAL values as measured by the EPA unless otherwise specified during implementation. The information here is used to support the Carbon Footprint reporting requirements in the M5 System.

The Fuel Type field exists on the Product Main frame so you can assign a fuel type to a product. This field becomes active if the user sets the Product Type equal to ‘FUEL’.

GHG On Road Setting

Module(s): Fuel Management

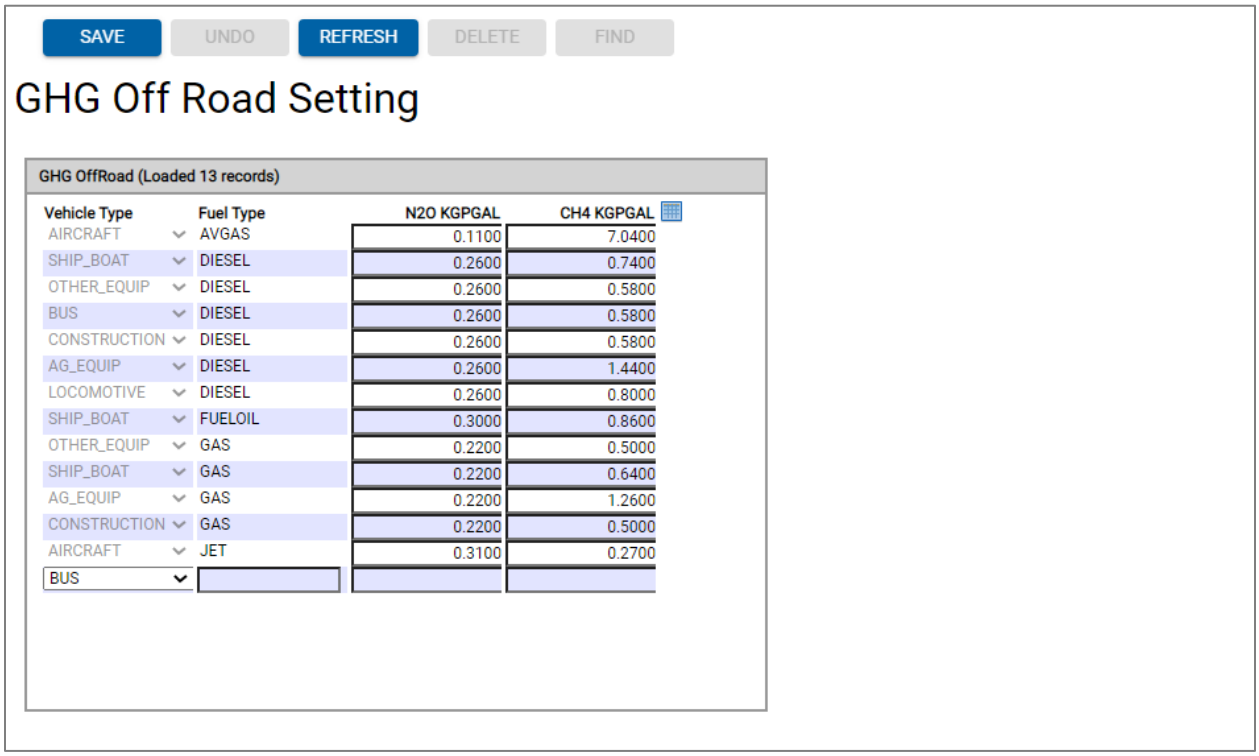


Vehicle Type	Fuel Type	Model Year	N2O GPM	CH4 GPM
PASS_CAR	CNG	2002	0.0500	0.7370
PASS_CAR	CNG	2003	0.0500	0.7370
PASS_CAR	CNG	2004	0.0500	0.7370
PASS_CAR	CNG	2005	0.0500	0.7370
PASS_CAR	CNG	2006	0.0500	0.7370
PASS_CAR	CNG	2007	0.0500	0.7370
PASS_CAR	CNG	2008	0.0500	0.7370
PASS_CAR	CNG	2009	0.0500	0.7370
PASS_CAR	CNG	2010	0.0500	0.7370
LIGHT_DUTY	CNG	1984	0.0500	0.7370
LIGHT_DUTY	CNG	1985	0.0500	0.7370
LIGHT_DUTY	CNG	1986	0.0500	0.7370
LIGHT_DUTY	CNG	1987	0.0500	0.7370
LIGHT_DUTY	CNG	1988	0.0500	0.7370
LIGHT_DUTY	CNG	1989	0.0500	0.7370
LIGHT_DUTY	CNG	1990	0.0500	0.7370
LIGHT_DUTY	CNG	1991	0.0500	0.7370
LIGHT_DUTY	CNG	1992	0.0500	0.7370

The GHG On Road Setting frame allows the user to enter N2O and CH4 coefficients.
The On-Road calculation is based on the number of miles travelled times the grams per mile coefficient for the vehicle/model year/fuel type combination.

GHG Off Road Setting

Module(s): Fuel Management



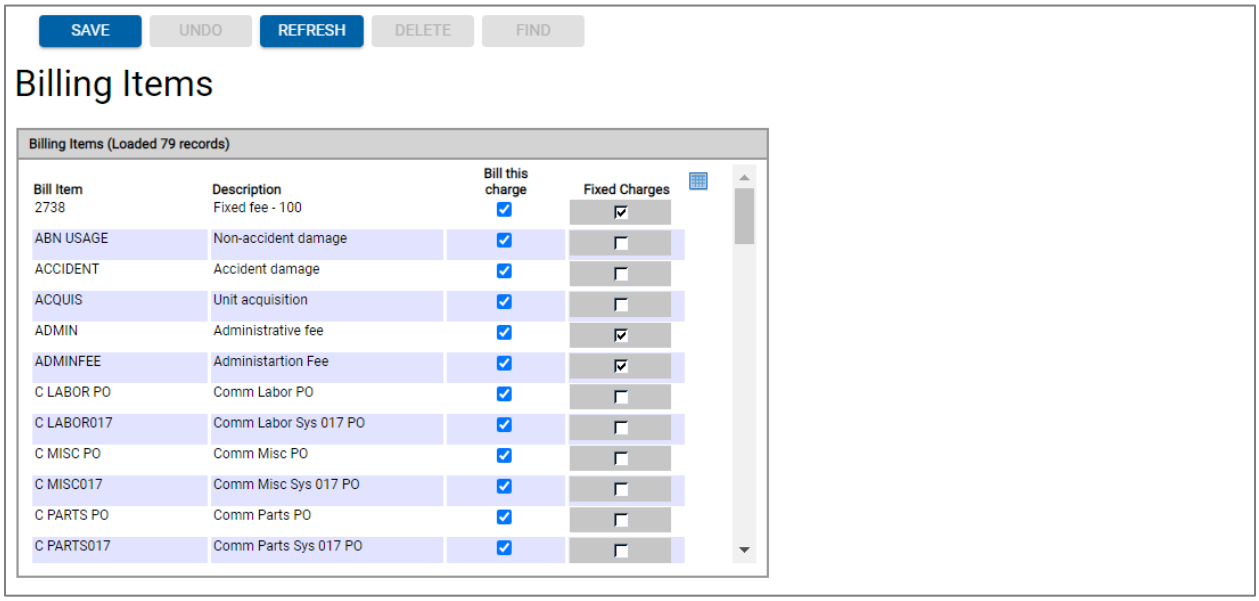
The GHG Off Road Setting frame allows the user to enter N2O and CH4 coefficients.
The Off-Road calculation is based on the number of gallons times the kilograms per gallon coefficient for the vehicle/fuel type combination.

Billing Module

Generally, a billing workshop is conducted to fully explore the billing requirements for a client. The *Billing Application User Training Guide* contains a complete overview of the configuration required to setup billing. Aside from establishing a billing code, additional frames need to be configured.

Billing Items

Module(s): Billing

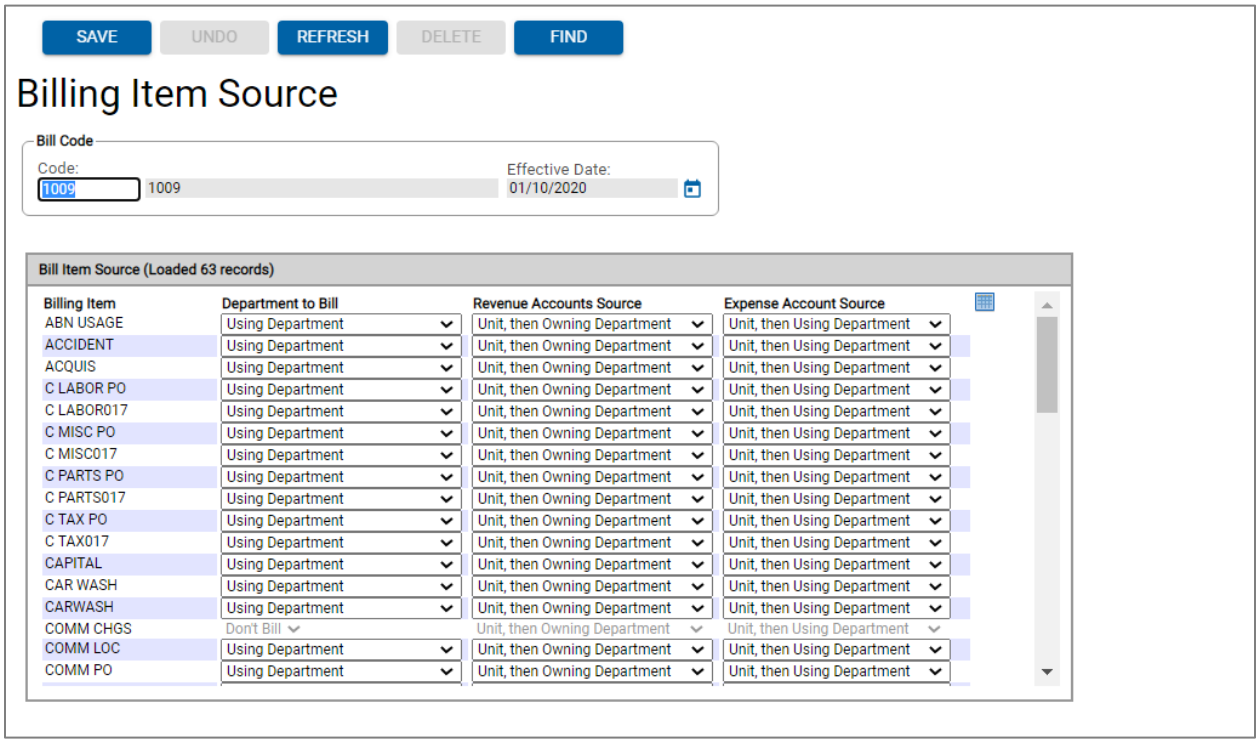


A Billing Item groups similar types of transactions together for the M5 billing program. In general, Billing Items are grouped into 'Point-in-Time' and 'Range of Time' transactions.

For each billing item, you must select the Bill this Charge checkbox if you want to bill that particular item. If you want to bill fixed charges by using the Bill Fixed Charges frame, select the Fixed Charges checkbox.

Billing Item Source

Module(s): Billing



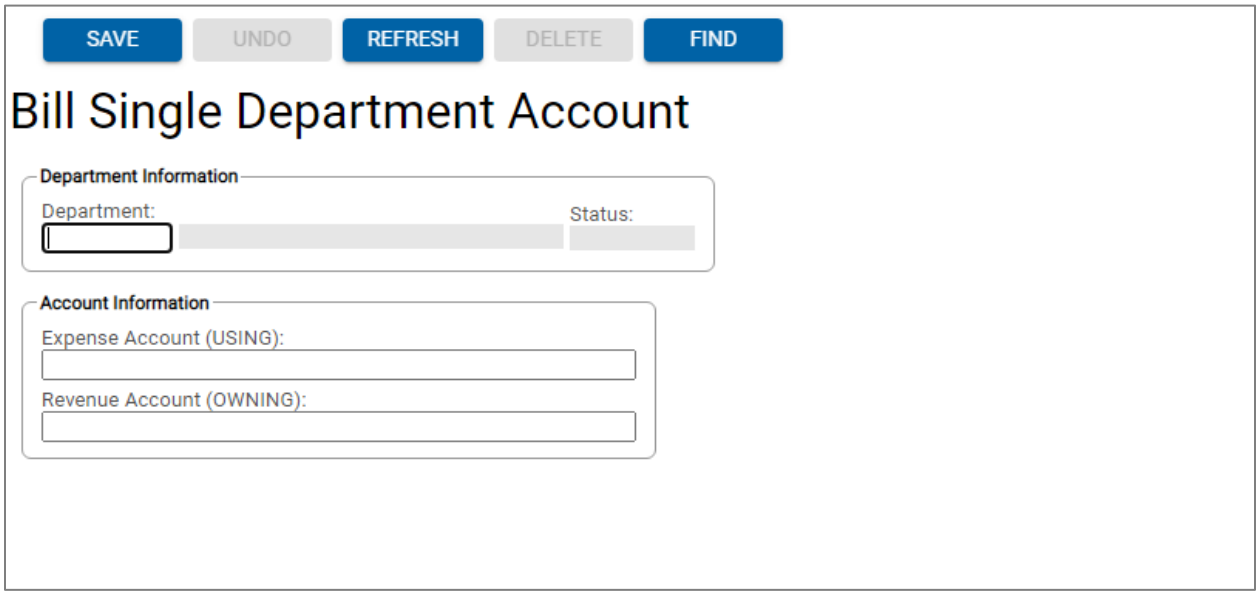
The Billing Item Source frame allows you to define who to bill and the sources of the revenue and expense accounts for each Billing Item for a particular Billing Code.

For each billing code, the Billing Item Source establishes whether to bill the owning department of the unit, the using department of the unit, or not to bill at all.

If a unit changes departments during the period, the point-in-time transactions (labor, fuel, motor pool) appear with the department as assigned at that time; range-of-time transactions (usage, lease) are pro-rated among the departments.

Department Billing Accounts

Module(s): Billing



The Billing Department Accounts frame allows you to define both Revenue and Expense accounts for each individual department Billing Item.

Use of this frame will depend on the value of System Flag 2060. If that flag is set to 'N', this frame will be available for use. If it is set to 'Y', you must use Bill Single Department Account frame.

For any billing item marked as billable in the “Billing Items” frame, a revenue and an expense account can be entered; neither is required.

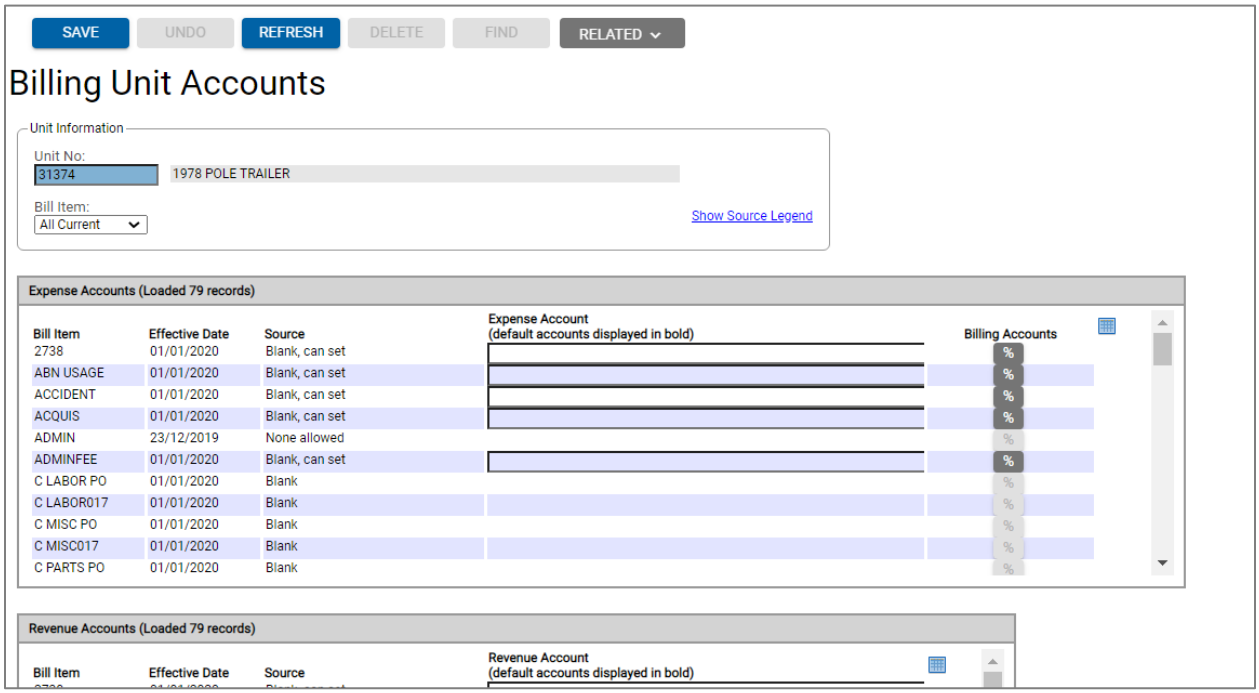
The revenue account is usually associated with the department as an owner since the owning department typically accumulates the charges from the using department for procurement of a replacement unit.

The expense account is usually associated with the using department because, in most cases, it is responsible for the unit's costs and leases.

These accounts are created and maintained on the Direct Account Codes frame and their format might depend on the template defined on the Company Definition frame.

Billing Unit Accounts

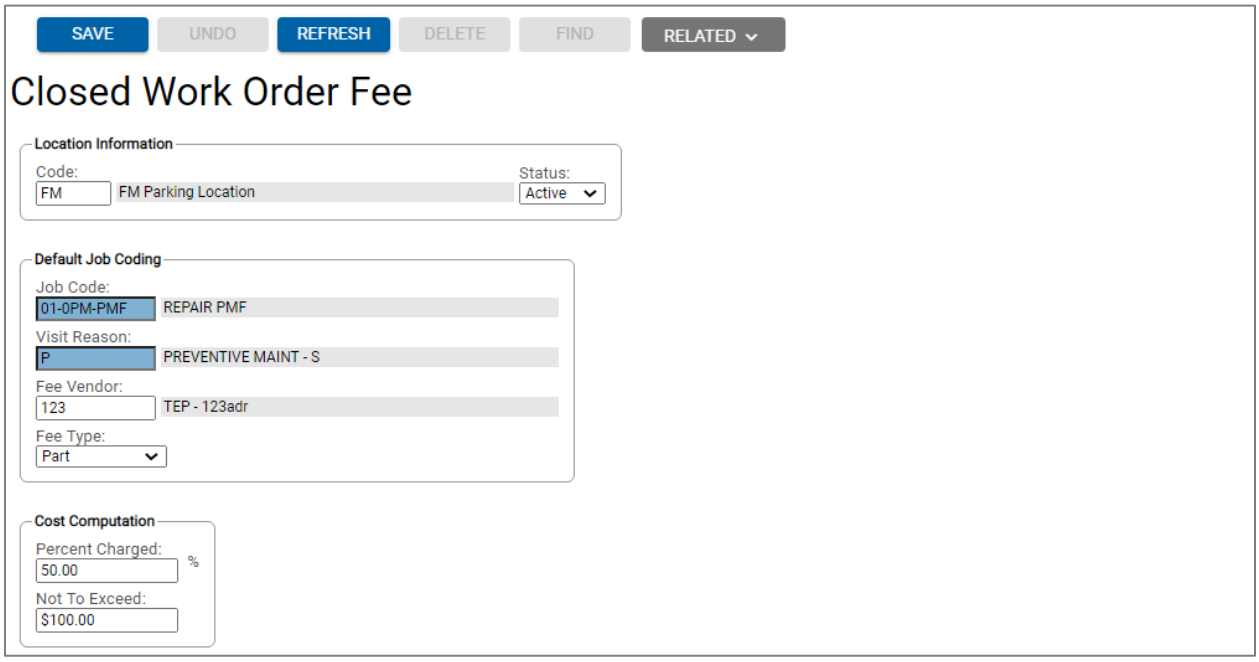
Module(s): Billing



The Billing Unit Accounts frame allows you to define Expense and Revenue Account information on Billing Items for a particular unit. This frame displays all of the accounts that have been associated with the unit along with those accounts' effective dates and billing items.

Billing Closed Work Order Fees

Module(s): Billing, Workflow Management

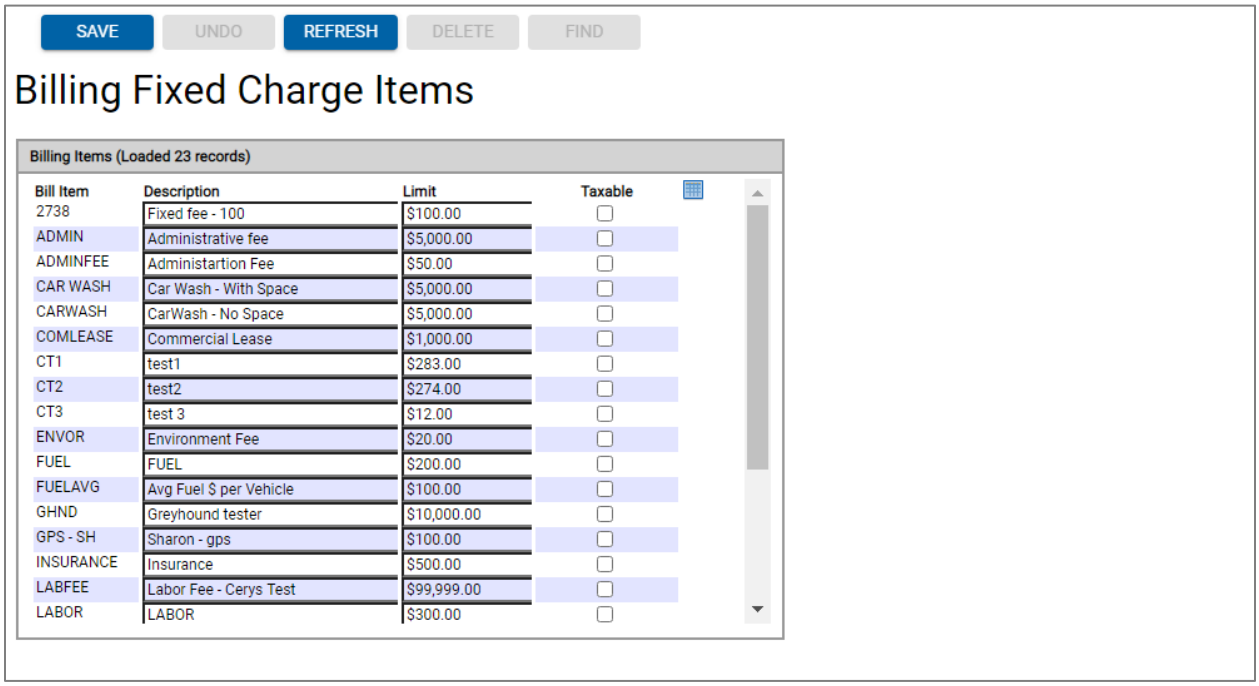


The Billing Work Order Fees frame allows you to define special work order fees that can be charged by Maintenance Location. When a work order is closed, a new job can be automatically added to the work order to reflect shop fees, environmental charges, a flat overhead or some other single charge.

These special fees will be applied to each Work Order on the commercial tab at the specified maintenance location once the work order is completed and closed. System Flag 1172 must be set to 'Y' to use this functionality.

Billing Fixed Charges

Module(s): Billing



The Billing Fixed Charges frame allows you to define additional, customer-specific billing items. In order to make a billing item available for fixed billing usage, you must flag it on the Billing Items frame.

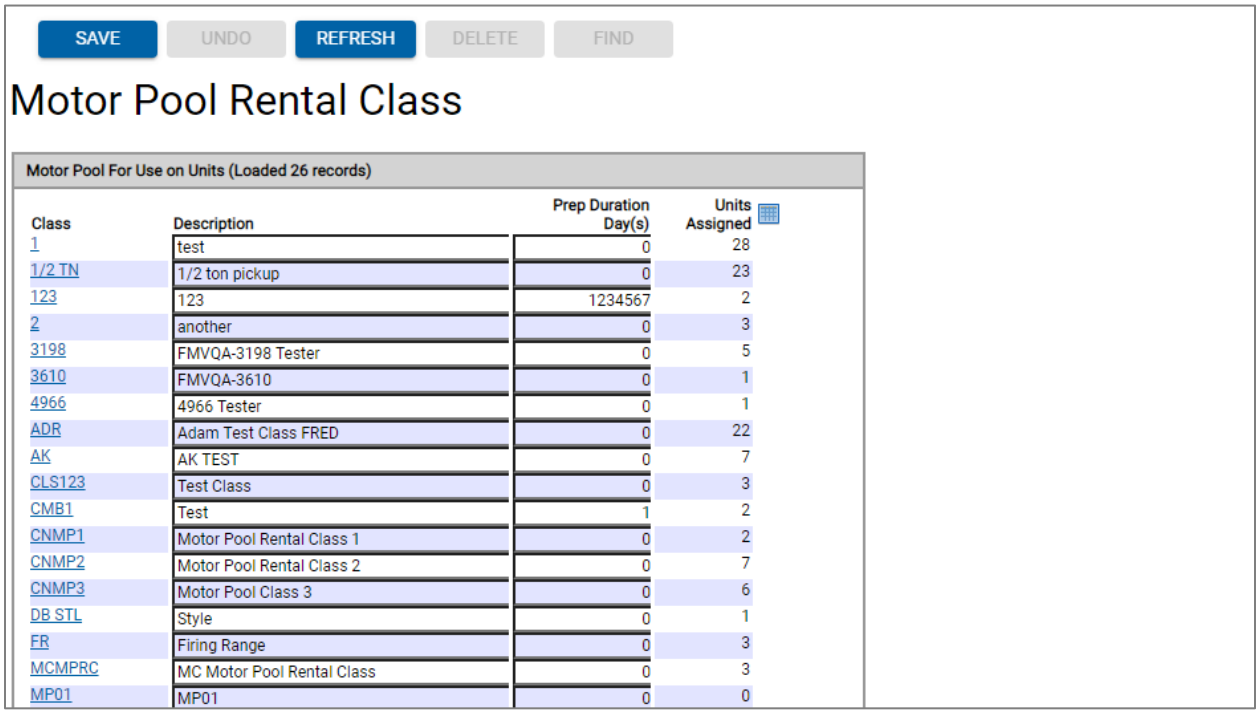
Each fixed charge is assigned a Billing Item, Description, and a Limit (maximum amount that can be charged per period).

Motor Pool Management

To configure the motor pool functionality, please refer to *Motor Pool Application User Training Guide*. In addition to setting up a Motor Pool billing code, you must configure two additional frames.

Motor Pool Rental Class

Module(s): Motor Pool

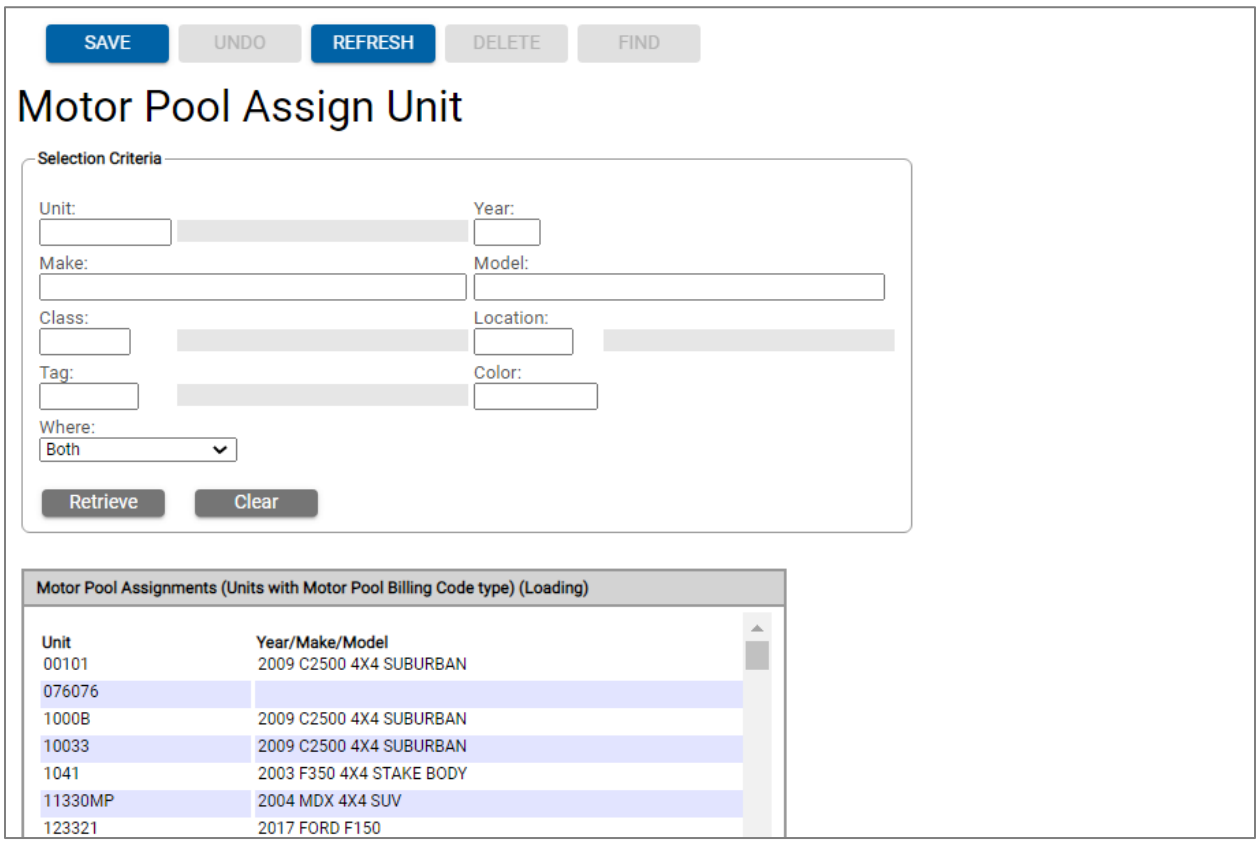


Class	Description	Prep Duration Day(s)	Units Assigned
1	test	0	28
1/2 TN	1/2 ton pickup	0	23
123	123	1234567	2
2	another	0	3
3198	FMVQA-3198 Tester	0	5
3610	FMVQA-3610	0	1
4966	4966 Tester	0	1
ADR	Adam Test Class FRED	0	22
AK	AK TEST	0	7
CLS123	Test Class	0	3
CMB1	Test	1	2
CNMP1	Motor Pool Rental Class 1	0	2
CNMP2	Motor Pool Rental Class 2	0	7
CNMP3	Motor Pool Class 3	0	6
DB STL	Style	0	1
FR	Firing Range	0	3
MCMPRC	MC Motor Pool Rental Class	0	3
MP01	MP01	0	0

The Motor Pool Rental Class frame allows you to create and maintain the rental classes for your Motor Pool. These Rental Classes help M5 manage fleet vehicle reservations based on total units in a class vs. how many are available in that rental class at the time of the reservation.

Motor Pool Assign Unit

Module(s): Billing



The Motor Pool Assign Unit frame displays all units that have a Motor Pool billing code. Assigning units to rental classes and locations is part of the setup process, but it also can be done on a periodic basis as you need to reassign units. Units that are reserved or out on rental cannot be reassigned to another rental class or location

This frame gives you the ability to easily assign things like Rental Class, Prep time, Location, Body Color, and Where Now (current location) or Ticket Number (if the unit is reserved to a Motor Pool Ticket).

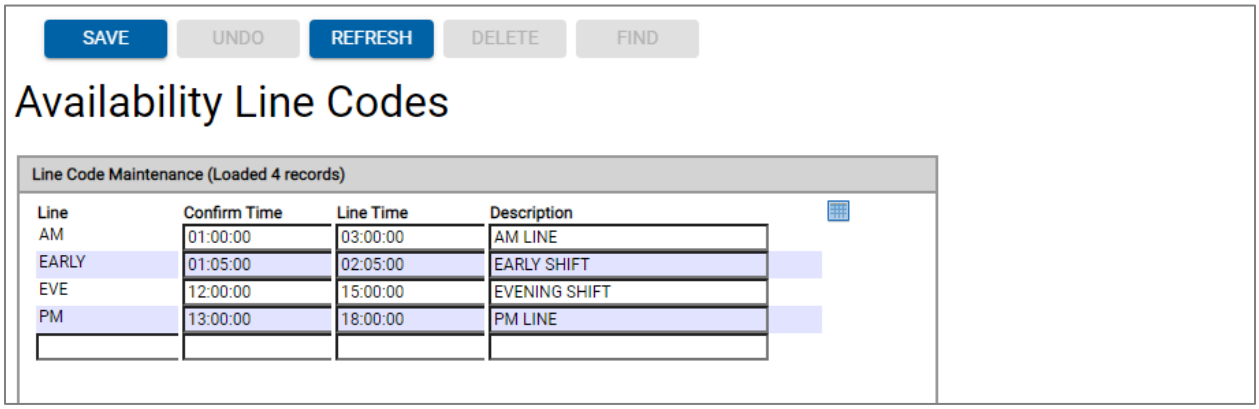
A unit must be assigned a motor pool rental class and motor pool location before it can be rented. If System Flag 2070 is set to "Y", then the user can create free form unit numbers that are not real M5 units during the motor pool pickup process. These units are temporary units and are not retained after the motor pool ticket is closed.

Unit Availability Module

To configure the Unit Availability functionality, refer to the *Unit Availability User Guide*.

Availability Line Codes

Module(s): Asset Management – Unit Availability



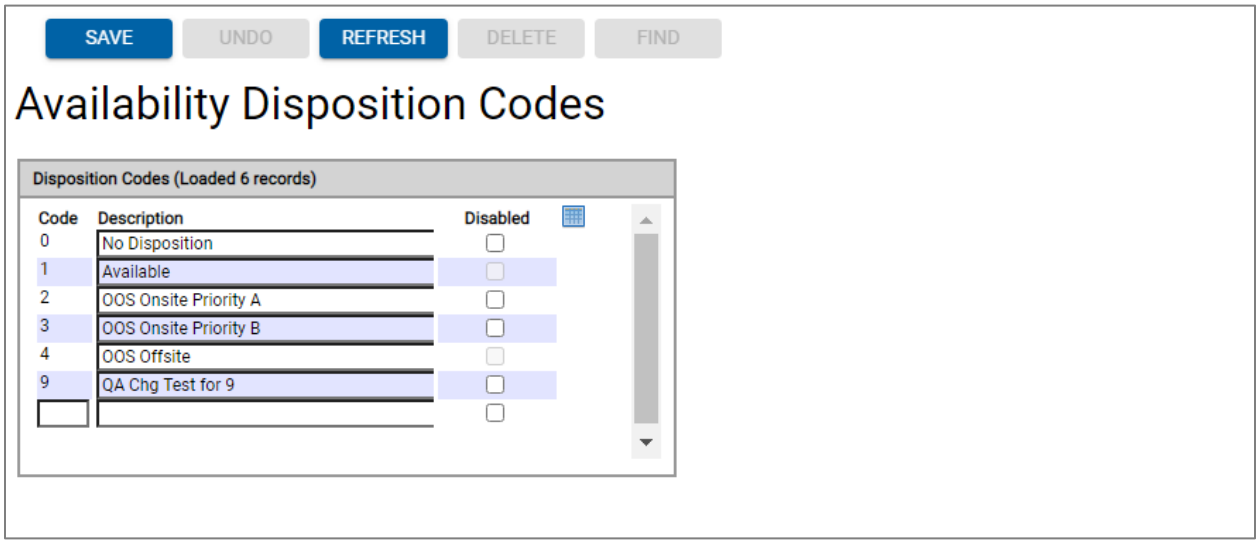
Availability Line Codes are used to set up the number of times throughout the day that a user can check available units in the fleet. It also sets the earliest time that the confirmation counts can be made for that line.

These codes are used on the Availability Requirements frame. At least one line needs to be defined in order to use the Unit Availability Module.

For example, if 8:00 am is early morning rush, a line is inserted in the frame to allow the user access to the units' availability process. If you have not previously considered using unit availability functionality, now might be a time to evaluate the additional customer support this module could provide for your mission critical user departments.

Availability Disposition Codes

Module(s): Asset Management – Unit Availability



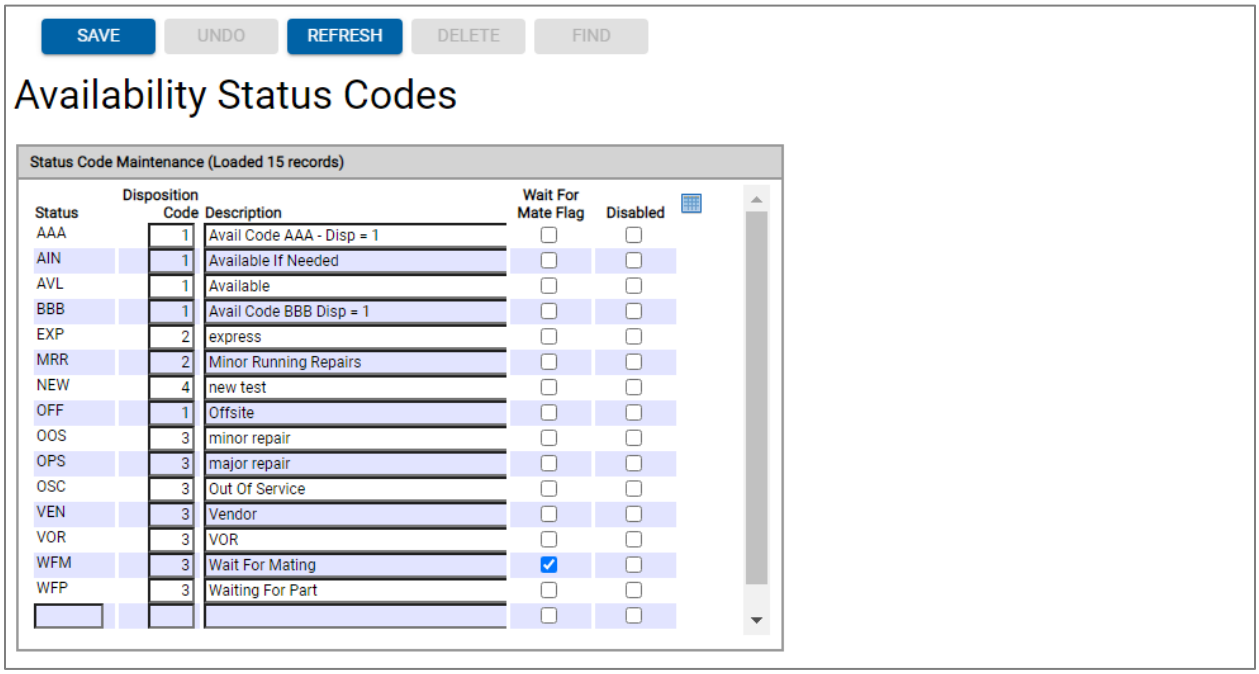
Availability Disposition Codes are one-character codes assigned to Availability Status Codes for reporting purposes. You can create up to ten Availability Disposition Codes.

Codes 1 and 4 are hard coded in the system and cannot be changed. Many reports and query frames rely on these codes. The Description can be change, but 1 is normally ‘Available’ and 4 is ‘Offsite’.

An example might be that the unit could have a status code of minor repair and assigned to a disposition code of 1 which means that the unit is available, if needed.

Availability Status Codes

Module(s): Asset Management – Unit Availability

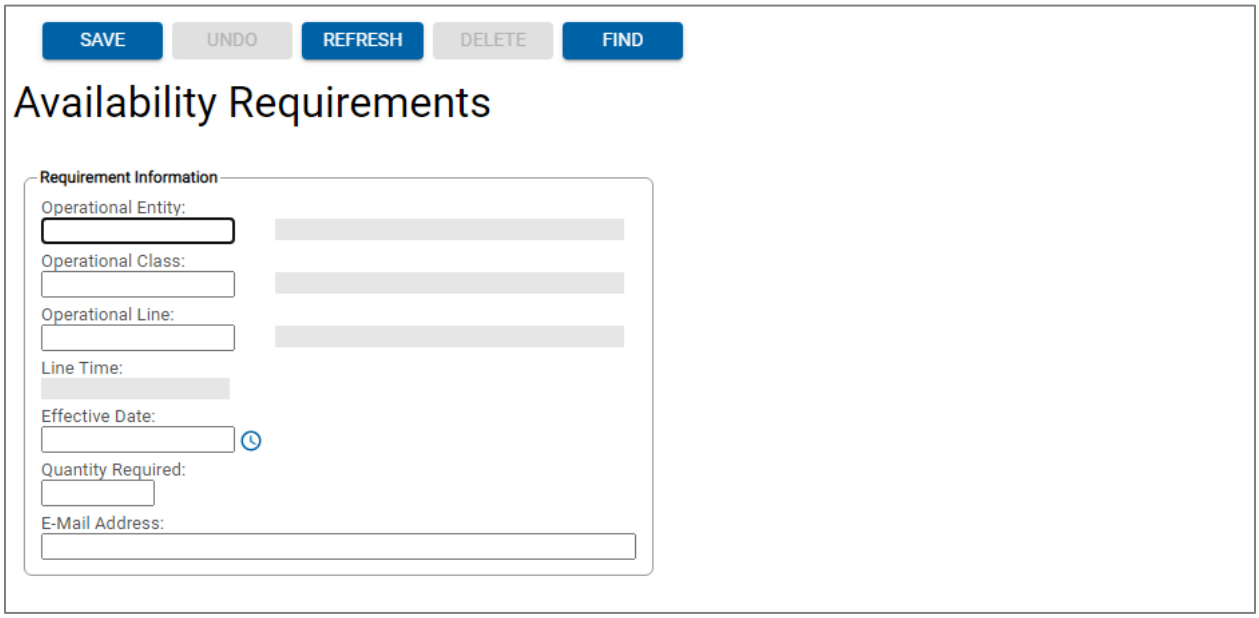


Status	Disposition Code	Description	Wait For Mate Flag	Disabled
AAA	1	Avail Code AAA - Disp = 1	☐	☐
AIN	1	Available If Needed	☐	☐
AVL	1	Available	☐	☐
BBB	1	Avail Code BBB Disp = 1	☐	☐
EXP	2	express	☐	☐
MRR	2	Minor Running Repairs	☐	☐
NEW	4	new test	☐	☐
OFF	1	Offsite	☐	☐
OOS	3	minor repair	☐	☐
OPS	3	major repair	☐	☐
OSC	3	Out Of Service	☐	☐
VEN	3	Vendor	☐	☐
VOR	3	VOR	☐	☐
WFM	3	Wait For Mating	☑	☐
WFP	3	Waiting For Part	☐	☐
			☐	☐

The Availability Status Codes frame allows you to create and maintain a set of codes that indicate a unit's current availability. The 3-character Status Code includes an Availability Disposition Code and is a critical component of the Unit Availability Module.

Availability Requirements

Module(s): Asset Management – Unit Availability



The Availability Requirements frame is used to designate the number of units required (by class) for a particular entity at a specific time.

Updates

Release	Section	Description
23.2	Holiday Calendar	Updated image to show the new Location Group field.
24.0	M5 System Administration Fuel Management Billing Module Motor Pool Management Unit Availability Module	Updated the reference file title names.