



M5 Navigation

Quick Guide

Version 24.x
Last Modified 24.4 | November 2024

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Technical Support

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

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

Telephone: 1-610-225-8300

Email: M5Support@AssetWorks.com

Website: Community.AssetWorks.com

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

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Overview

The M5 Navigation Quick Guide provides a quick overview and introduction to navigation in M5. For the most part, the way you navigate throughout the application is similar.

Signing in to M5

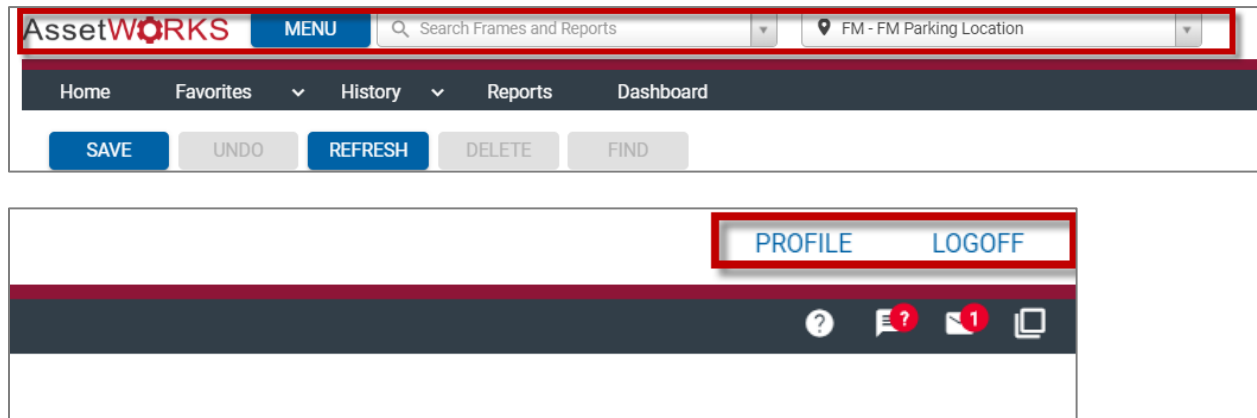
M5 can still be run using Microsoft Edge and Google Chrome. The **User name** and **Password** are required in order to sign in to M5. If using a single sign on, you can enter your network credentials as a form of authentication. If not using a single sign on, ask for the application **User name** and **Password** to sign in from your M5 system administrator.



M5 is a web-based program with many of the same navigation characteristics of the Internet such as button bars, hyperlinks, icons, dropdown menus, frames, and scroll bars. The landing page that appears after you sign into M5 is the **Homepage**.

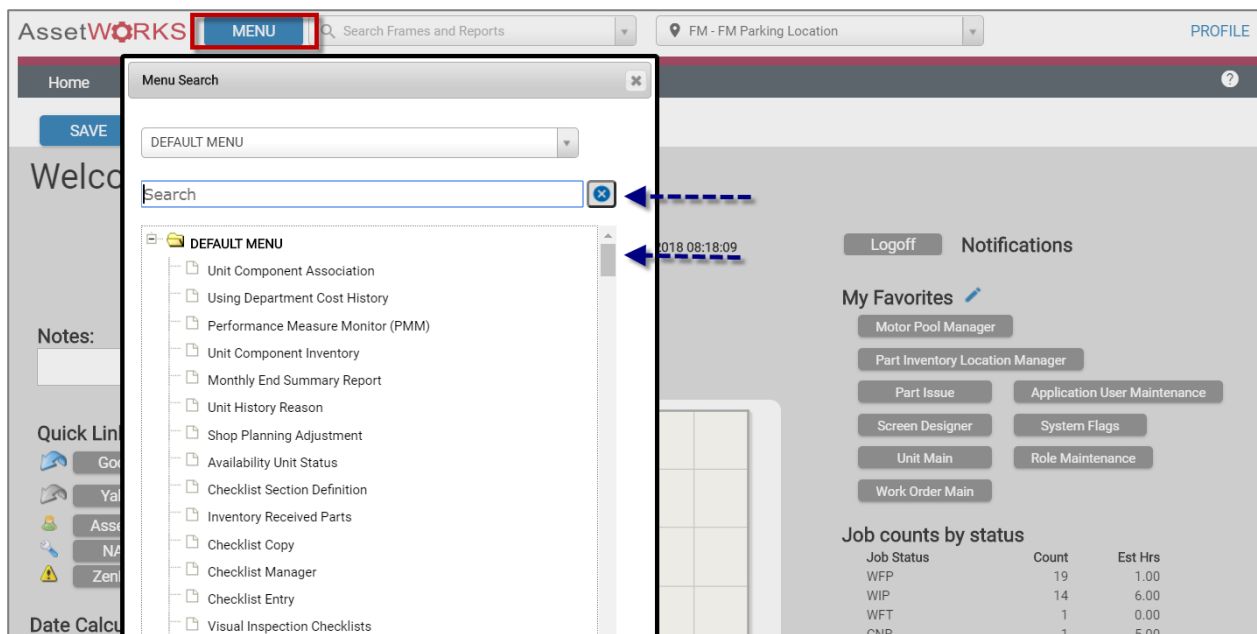
The Fleet System Administrator can customize the homepage using screen designer, to contain additional elements like dashboard KPI's, notifications, and corporate wide messages.

Control Bar

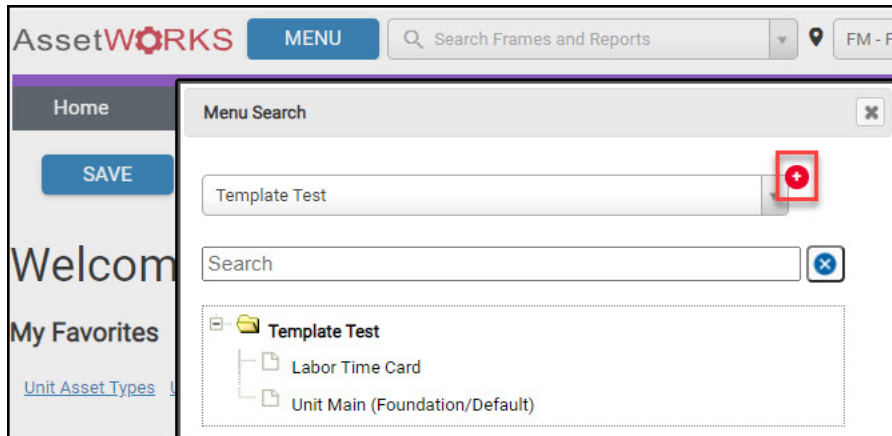


The control bar at the top of each frame incorporates the **MENU** button and the **PROFILE** and **LOGOFF** buttons.

Menu Button



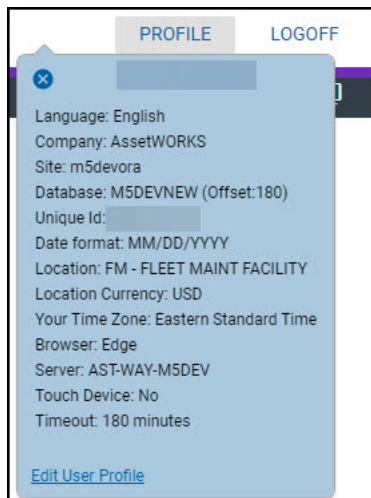
The **MENU** button launches a **Menu Search** window with scrolling and search functionality.



Individual menus can be selected from the dropdown at the top of the window. You can scroll or search through the selected menu. You have the option to switch your default menu using the red **Plus (+)** icon next to the menu dropdown.

To navigate to a specific page in M5, select the name of the frame and M5 loads the selected frame.

Profile and Logoff Buttons



The **PROFILE** button allows you to edit your user profile.

The **LOGOFF** button allows you to sign out of the system.

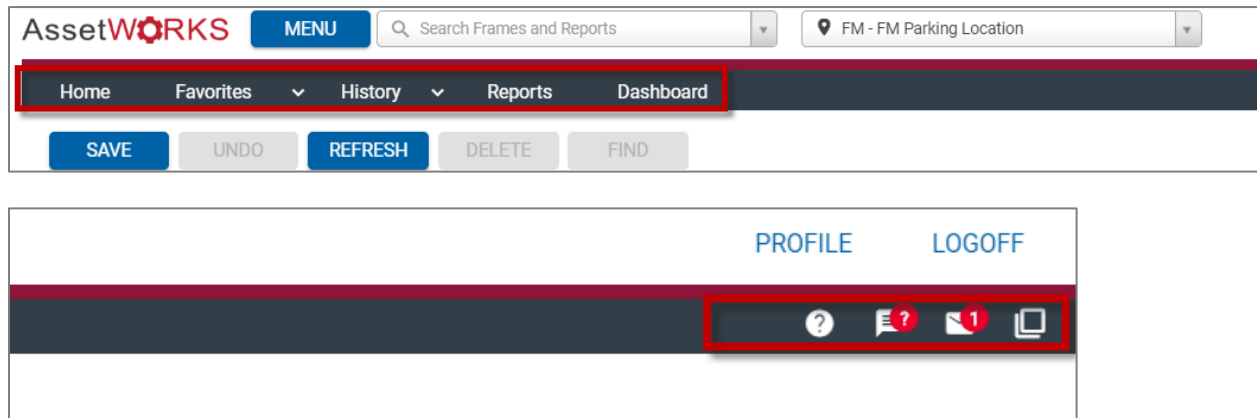
User Profile

You can set user setting options on the *User Profile* frame:

- **Auto Complete** – On or Off.
- **Related Frames** – All or Select.
- **LOV default to show all** – On or Off.
- **Ribbon Highlight Color** – Leave blank or select a highlight color.
- **Sound** – On or Off.
- **Toolbar** – More List or Icons
- **Window** – Separate Window or Browser Choice.
- **Dashboard Grid** – On or Off.
- **Override Locale** – Allows you to override your user locale that is normally set by your browser setting or query string.

Note: Auto Complete, Ribbon Highlight Color, Toolbar, and Dashboard Grid – Setting options can default to a M5_PARAMS setting.

Static Menu Bar



Home - Navigates to the home page.

Favorites – List of your favorites. You can add new frames by selecting the red **Plus (+)** icon.

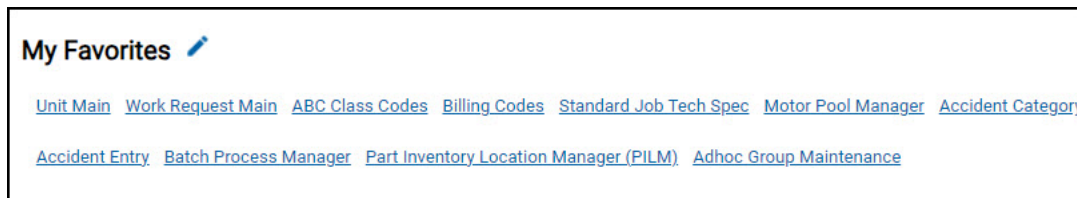
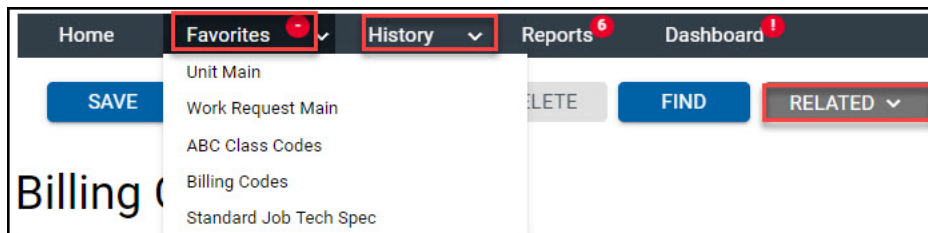
History – List of previously visited frames during the current session.

Reports –Navigates to the reports page.

Dashboard –Navigates to the dashboard page.

The four buttons to the right side of the menu bar are to access *Help*, *Chat*, *Notifications*, and opens the *Target Window*.

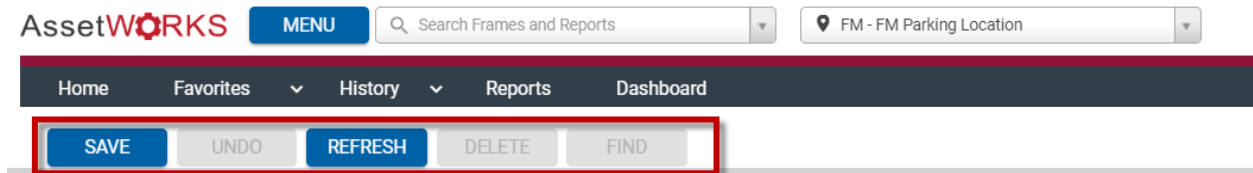
Favorites, History, and Related Links Lists



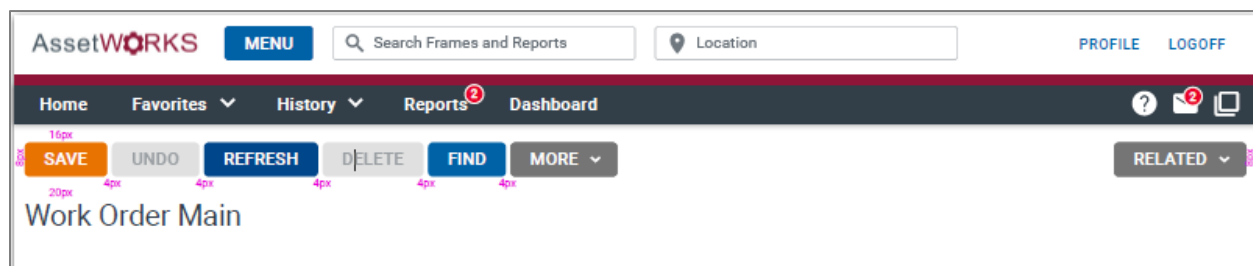
You can scroll through the **Favorites**, **History**, and **Related** dropdown lists to easily navigate to the bottom and return to the top of the list.

Note: Your **Favorites** display on the **Homepage** when you sign in to M5. You can select the link to easily access the frame.

Button Bar

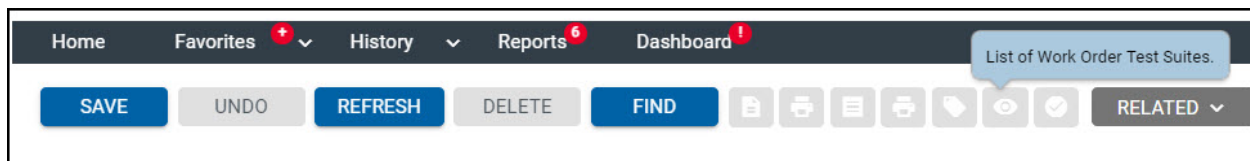
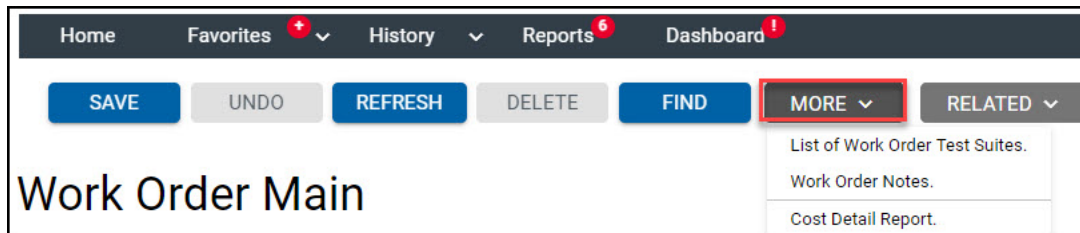


The buttons only display the word, (for example **SAVE**).





Secondary Buttons



On the **User Profile** you can select *More List* or *Icons* from the **Toolbar** setting. This setting determines whether you see the **MORE** dropdown list or **Icons**:

- The **MORE** button groups lists by actions and reports.
- A tooltip displays the description when you hover over the **Icon**.

Secondary buttons, (for example, **MORE** and **RELATED**) are grey in color as opposed to the primary buttons which are blue (for example, **SAVE**).

Application Area

Unit Main

Unit Information

Unit:

Description: Status:

Alternate Unit No.:

Asset/Codes **Dept/Locations** **Class** **Meter/Accounting** **License/Notes** **GPS Location**

Year / Manufacturer / Make / Model

Unit Codes

Serial Number:

MCC:

Activity:

Tech Spec Number:

Asset Category:

Asset Class:

Asset Type: Equipment Type: SKU:

Billing:

High Priority: ☐

Passive GPS: ☐

Driver Behavior: ☐

The *Application* area refers to the M5 application functionality.

In all the M5 application frames:

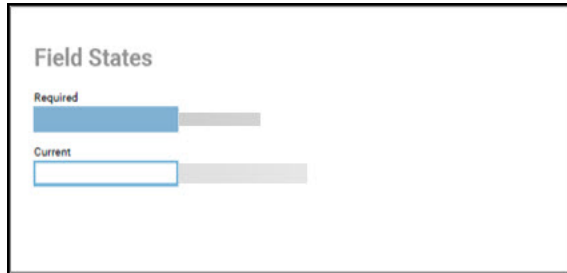
- The tab key or enter key is used to move from field to field.
- The default for dates is MM/DD/YYYY.
- Default format for time is entered as 24-hour clock and HH:MM:SS.
- You can designate the format of dates and times through changes on the *Mask Maintenance* frame.
- Data changes in an application frame are saved when the **SAVE** button is selected.
- Occasionally, the use of the vertical and horizontal scroll bars are necessary to see all the data on an application frame.



The use of vertical and horizontal scroll bars are based on your screen resolution and zoom level.

Basic Navigation

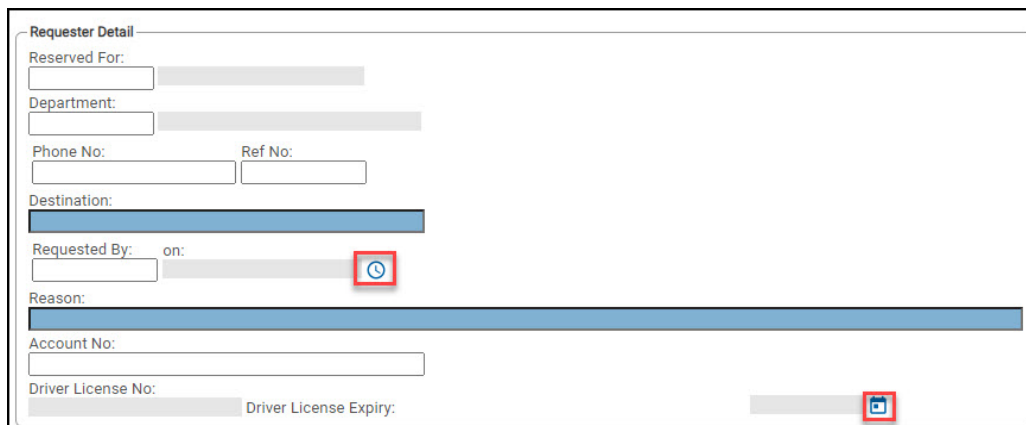
Field States



The diagram titled "Field States" shows two horizontal bars representing input fields. The top bar is labeled "Required" and is filled with a solid blue color. The bottom bar is labeled "Current" and has a blue outline, while the rest of the bar is light gray.

Visual displays for **Required** fields in M5 fill in with blue and the **Current** field you are on is outlined in blue.

Icons - Standard Color and Images



The "Requester Detail" form contains several input fields. A red square highlights a clock icon next to the "Requested By: on:" field. Another red square highlights a calendar icon next to the "Driver License Expiry:" field.

Icons (for example, the **Clock or Calendar**), are a standardized image and color throughout the M5 application.



You can double-click on the **Clock** icon to select a new date and time.



You can double-click on the **Calendar** icon to select a new date.

Tab sections

Unit Main

Unit Information

Unit:

Description: Status:

Alternate Unit No.:

Asset/Codes

Year / Manufacturer / Make / Model

Unit Codes

Serial Number:

MCC:

Activity:

Tech Spec Number:

Asset Category:

Asset Class:

Asset Type: Equipment Type: SKU:

Billing:

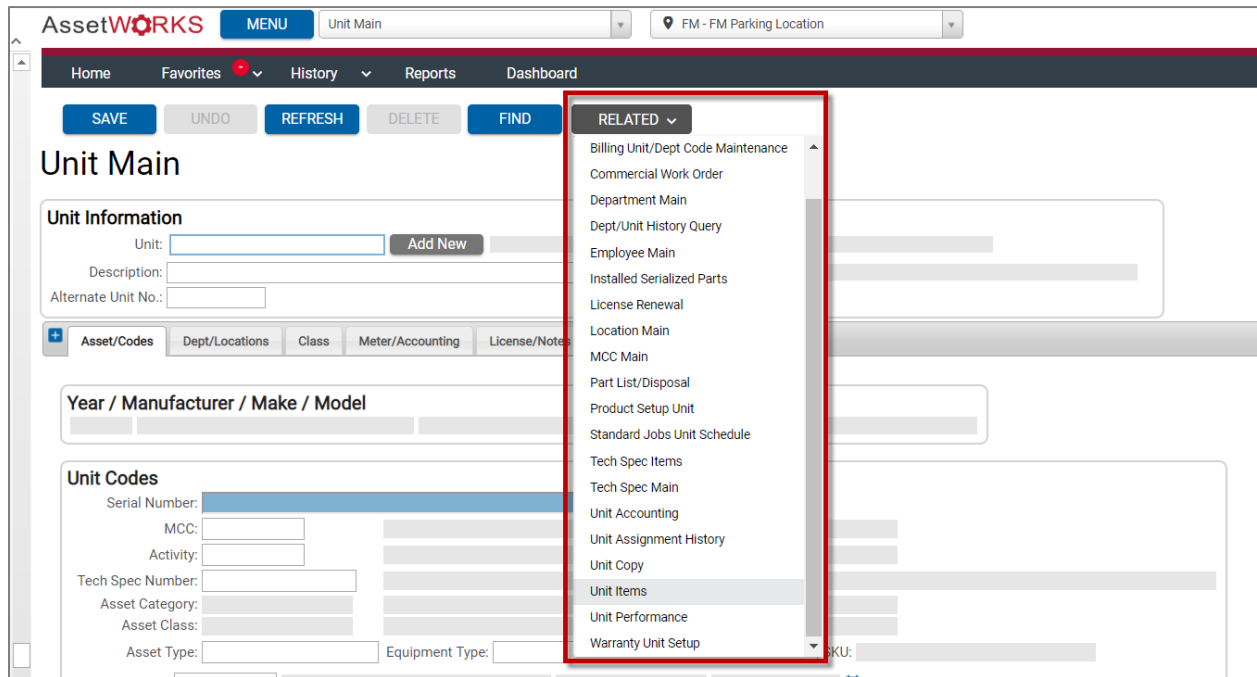
High Priority: ☐

Passive GPS: ☐

Driver Behavior: ☐

Many frames in M5 have **Tabs** (for example, *Asset/Codes*) that can be viewed by selecting the specific tab or selecting the **Plus (+)** icon to expand all tabs to view on one frame by scrolling down.

Related Frames



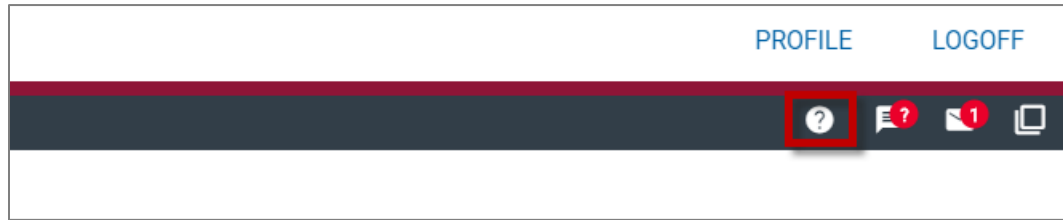
On some frames, there is additional information in a separate application frame that pertains to the frame displayed. The **Related** button can be customized by adding additional frames using *Frame Maintenance*.

 See the *System Administration Application User Training* guide for more information.

Hyperlinks appear from the **Related** dropdown menu when you hover over the link that exists to the right of the button bar.

Some frames accessed through a **Related** link opens a new application window. For example, the *Unit Items* frame would open from *Unit Main*, the system puts the current **Unit** number in the **Unit** number field. This is referred to as a sticky field, as M5 remembers the last unit number displayed.

Help Files



Most M5 frames have a *Help* topic pages that explain the general way to use a specific frame. To launch a M5 Help topic page select the ? button at the top right of the frame.

This launches the **Help** topic page in a new tab in your current browser session.

[Show](#)

Home > [Asset Management](#) > [Unit](#) > Unit Main

Unit Main

The Unit Main frame allows you to add new units and receive them into your fleet. You can create a new unit or receive them into inventory as the last step in the unit request process. You can use this frame to manage information about the assets throughout their life cycle.

How to:

Create a new unit

1. Enter a new **Unit** number.
Note: The unit number must be unique (for example, not a component number). Limited to 30 characters. System Flag 1000 determines how new unit numbers are entered or generated.
2. Enter a **Description** of the new unit. Limited to 75 characters.
3. If applicable, enter the **Alternate Unit No.** Limited to 30 characters.
4. Select **SAVE** to create the new unit.

Modify a unit

1. Enter the **Unit** number or select from the Unit List.
2. Make changes to the fields, as applicable.
3. Select **SAVE** to update the unit record.

Delete a unit

1. Enter the **Unit** number or select from the Unit List.
1. Select the unit number field.
2. Select **DELETE**. A popup displays asking if you are sure you want to delete the unit.
3. Select **Delete** to confirm the deletion.
4. Select **SAVE**.

List of Values (LoV)

Unit List ☐ Favorite

Filter Finder

<input checked="" type="checkbox"/> Number: %	<input type="text"/>	<input checked="" type="checkbox"/> Year: =	<input type="text"/>
<input checked="" type="checkbox"/> Make: %	<input type="text"/>	<input checked="" type="checkbox"/> Model: %	<input type="text"/>
<input type="checkbox"/> Alt. Unit No.: %	<input type="text"/>	<input type="checkbox"/> Alt. Description: %	<input type="text"/>
<input type="checkbox"/> Activity Code: %	<input type="text"/>	<input type="checkbox"/> Attachment Serial No.: %	<input type="text"/>
<input type="checkbox"/> Attachment Tech Spec: %	<input type="text"/>	<input type="checkbox"/> Billing Code: %	<input type="text"/>
<input type="checkbox"/> Bin: %	<input type="text"/>	<input type="checkbox"/> Category: %	<input type="text"/>
<input type="checkbox"/> Class 1: %	<input type="text"/>	<input type="checkbox"/> Class 2: %	<input type="text"/>
<input type="checkbox"/> Class 3: %	<input type="text"/>	<input type="checkbox"/> Class 4: %	<input type="text"/>
<input type="checkbox"/> Class 5: %	<input type="text"/>	<input type="checkbox"/> Delivery Loc: %	<input type="text"/>
<input type="checkbox"/> Fuel Loc: %	<input type="text"/>	<input type="checkbox"/> In-Serv Date: >=	<input type="text"/>
<input type="checkbox"/> Maint. Loc: %	<input type="text"/>	<input type="checkbox"/> Manufacturer: %	<input type="text"/>
<input type="checkbox"/> MCC: %	<input type="text"/>	<input type="checkbox"/> Notes: %	<input type="text"/>
<input type="checkbox"/> Oper Class: %	<input type="text"/>	<input type="checkbox"/> Owner Department: %	<input type="text"/>
<input type="checkbox"/> Owner Type: = All ▼		<input type="checkbox"/> Parking Loc: %	<input type="text"/>
<input type="checkbox"/> PO No.: %	<input type="text"/>	<input type="checkbox"/> Purchase Cost: %	<input type="text"/>
<input type="checkbox"/> Primary Meter: >=	<input type="text"/>	<input type="checkbox"/> Primary Meter Date: >=	<input type="text"/>
<input type="checkbox"/> Replace Date: >=	<input type="text"/>	<input type="checkbox"/> Requisition No.: %	<input type="text"/>
<input type="checkbox"/> Secondary Meter: >=	<input type="text"/>	<input type="checkbox"/> Secondary Meter Date: >=	<input type="text"/>
<input type="checkbox"/> Serial Nbr.: %	<input type="text"/>	<input type="checkbox"/> Status: = LOV Status ▼	
<input type="checkbox"/> Tech Spec: %	<input type="text"/>	<input type="checkbox"/> Title No.: %	<input type="text"/>
<input type="checkbox"/> Unit Operator: %	<input type="text"/>	<input type="checkbox"/> Using Department: %	<input type="text"/>
<input type="checkbox"/> High Priority: = All ▼		<input type="checkbox"/> Asset Number: %	<input type="text"/>
<input type="checkbox"/> Asset Type: %	<input type="text"/>		

Alternate Search Screens:

- [Unit by License](#)
- [Unit by Unit Item](#)
- [Unit by TechSpec Item](#)
- [Unit by Product](#)
- [Unit by Asset Class](#)
- [Unit by Alternate](#)

When certain values are not readily known, you can use the *List of Values* (LoV) to search for and select the value. This can be done by selecting the **FIND** button at the top of the frame (if active), by double-clicking in the field, or using the keyboard shortcut **Alt+L**. For example, the **Unit** field on *Unit Main* will launch the *Unit List* LoV.

The *List of Values* (LoV) is two frames. The first frame is the filter frame used to narrow down the search criteria displayed in the results. The second part of the LoV is the results page.



Some LoV's will open the results page by default in order to return to criteria selection.



Be mindful that there are additional hyperlinks on some *List of Values* frames as well. For example, if the driver only knew their license plate number, then select the **Unit by License** hyperlink and the filters will change accordingly. Additional selections can be made to narrow down the search.

Each field will show the available operators for searching. Most fields display a **Wildcard (%)** to indicate that any data entered will contain a wildcard search for data before and after the value entered.



If you manually enter the wildcard value yourself, the wildcard functionality no longer applies.

Unit List ☐ Favorite

Depress this button to show the filtering and search options.

Warning - Search results have exceeded 2000 items. Search feature will display results only. Entering additional filter criteria is recommended.

Show all rows ▼ Copy Excel Print

Number	Year	Make	M
20088	1954	HOT LINE	TD

The LoV function features a more appropriately phrased and appropriately placed warning message for when searches exceeds the default number of items. You can select the button to narrow down your search.

Favorite List of Values

Unit List ☒ Favorite

Filter Finder

☒ Number: %

☒ Make: %

☐ Alt. Unit No.: %

☐ Activity Code: %

☐ Attachment Tech Spec: %

☐ Bin: %

☐ Class 1: %

☐ Class 3: %

☐ Class 5: %

☐ Fuel Loc: %

☐ Maint. Loc: %

☐ MCC: %

☐ Oper Class: %

☐ Owner Type: = All ▼

☐ PO No.: %

☐ Primary Meter: >=

☐ Replace Date: >=

☐ Secondary Meter: >=

☐ Serial No.: %

☐ Tech Spec: %

☐ Unit Operator: %

☐ High Priority: = All ▼

☐ Asset Type: %

☐ Replaced By Unit: %

Clear

Alternate Search Screens:

- [Unit by License](#)
- [Unit by Unit Item](#)
- [Unit by TechSpec Item](#)
- [Unit by Product](#)
- [Unit by Asset Class](#)
- [Unit by Alternate](#)
- [Unit by Disposal](#)

You can select the **Favorite checkbox** when searching if there are **Alternate Search Screens** available for a frame. For example, the *Unit List* frame has a default LoV to search by Unit Number.

However, the **Alternative Search Screens** display links for other search options. For example, **Unit by License**, **Unit by Unit Item**, and **Unit by Tech Spec Item**. If you want to default the *Unit List* LoV to **Unit By License**, select the **Unit by License** LoV, then select the **Favorite** checkbox.

This now becomes your default *Unit List* LoV for the Unit List. The **Favorite** checkbox also saves any additional filters chosen to display in the list of results.

Navigation Control (VCR Control)

The screenshot shows the 'Unit List' frame with a 'Favorite' checkbox. A warning message states: 'Warning - Search results have exceeded 2000 items. Search feature will be limited based on the current display results only. Entering additional filter criteria is recommended.' Below the warning are buttons for 'Show 20 rows', 'Copy', 'Excel', and 'Print'. A search bar is also present. The main table displays vehicle records with columns: Number, Year, Make, and Model. The table lists various units, including #1 UNIT, 000088, 0010-1, 0010-2, 0010-3, 0010-4, 00101, 00102, 00103, 00103COPY, 00104, 0016, 0017, 001SM, 0023, 0042, 0045, 0102SM, and 0105AUSM1. At the bottom, it says 'Showing 1 to 20 of 2,001 entries' and includes 'First', 'Previous', 'Next', and 'Last' navigation buttons. A red box highlights a 'Navigation Control' button with a right-pointing arrow and a tooltip that reads: 'Depress this to open the navigation control that allows easy record by record navigation.'

Number	Year	Make	Model
# 1UNIT	2006	MDX	4X4 SUV
#1 UNIT	2006	MDX	4X4 SUV
000088			
0010-1	2009	C2500 4X4	SUBURBAN
0010-2	2009	C2500 4X4	SUBURBAN
0010-3	2009	C2500 4X4	SUBURBAN
0010-4	2009	C2500 4X4	SUBURBAN
00101	2009	C2500 4X4	SUBURBAN
00102	2009	C2500 4X4	SUBURBAN
00103	2009	C2500 4X4	SUBURBAN
00103COPY	2009	C2500 4X4	SUBURBAN
00104	2009	C2500 4X4	SUBURBAN
0016	1995	CHRYSLER	TOWN & CTRY
0017	1995	CHRYSLER	TOWN & CTRY
001SM			
0023	1995	CHRYSLER	TOWN & CTRY
0042	1995	CHRYSLER	TOWN & CTRY
0045	1995	CHRYSLER	TOWN & CTRY
0102SM	2006	FORD	WINDSTAR
0105AUSM1			

Another feature on the *List of Values* frame that assists in scrolling through individual records is to see details. This is called the *Navigation Control*. It can be used to scroll through records obtained during the LoV search.

Record changes can be modified and saved while using the *Navigation Control*. The *Navigation Control* will remain present until it is manually closed or you navigate off the page to another frame in M5.

Tool Tips

The screenshot shows the 'Work Request Query' interface. At the top, there are buttons: SAVE, UNDO, REFRESH, DELETE, FIND, and MORE. Below these is the 'Selection Criteria' section with fields for Location (FM), Unit, Status (Ready for work), and Due Days Within (30). A 'Retrieve' button is present. Below the selection criteria is a 'Query Results' section showing a table of results. A tooltip is displayed over the job code '01-15-001', showing the description 'REPAIR STEERING WHEEL'.

Unit	Work Order	Location	User Dept	Job Code	Reason	Hours	Priority	Due Date	Work Plan Number	Shift Assignment	Accident No	Locked?	Confirm	Notes
PA05		FM	0010	01-15-001	W	3.00	8	02/13/2011				Locked		
00103		FM	0010SHORT	04-17	I	5.00	5	04/23/2011	5	1		Locked		
0045		FM	0012	01-17-004	P	0.00	5	09/30/2014				Locked		
AK22		FM	334455	05-PM-PIA	P	0.00	5	04/02/2015	23			Locked		N
A6767		FM	0230	02-12-003	1	0.00	8	10/28/2015				Locked		N
CL01Z		FM	0010	02-12-003	1	0.00	8	10/28/2015				Locked		N
AK1		FM	334455	01-13-002	1	0.00	5	10/30/2015				Locked		
0045		FM	0012	01-01-001	1	0.00	5	01/25/2016				Locked		

On many frames, such as *Work Request Query*, all the descriptive information will not fit on the frame. If you hover over an item such as the job code, 01-15-001, the system displays the job code description (for example, REPAIR STEERING WHEEL). This is called a “tool tip” that displays additional information about a field.

I-frame Printing

The screenshot shows an i-frame interface with a table of results. A tooltip is displayed over the 'Print' icon in the bottom right corner of the i-frame, showing the text 'Options', 'Select for copy', and 'Print'.

Warr Violation	Print	Bill Fixed	Ext Data	Project Code	Accident Number
<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>			
<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>			

On many i-frames, there is a **Print** icon at the right side of the i-frame. To print the contents of the results, select the **Print** icon at the far top right hand corner of the i-frame.

The **Select for copy** icon allows you to copy the data to paste the data into another program such as Microsoft Excel.

Updates

Release	Section	Description
23.2	All sections	Applied miscellaneous writing style updates throughout the document.
24.4	Overview	Profile and Logoff Buttons - Updated the image and added content.
24.4	Overview	Added User Profile section, image, and content.
24.4	Overview	Signing in to M5 – Updated the image.