



Maintenance Appointments

Quick Guide

Version 24.x
Last Modified 24.0 | March 2024

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Technical Support

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

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

Telephone: 1-610-225-8300

Email: M5Support@AssetWorks.com

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 Maintenance Appointments module serves to help customers streamline the scheduling of maintenance services across their organization's fleet service centers (Maintenance Locations in M5).

This calendar-based feature allows department contacts or fleet coordinators to view available maintenance time slots by using appointment frames in M5 (Maintenance Appointment Request and Maintenance Appointment Approval).

This module is designed to work and integrate with existing Work Request functionality within M5 and requires the purchase of an additional license.

Frames and System Flags

- **Maintenance Time Slot** – Create and manage valid maintenance appointment times for various service locations in M5.
- **Maintenance Appointment Request** – Create appointment request for a unit using the calendar feature; valid time slots appear in blue.
- **Maintenance Appointment Approval** – Department contacts/fleet coordinators can approve (or deny) appointment requests using the same calendar feature on this frame.
- **Notification Manager** – Enable and configure email notifications for the maintenance request process.
- **Work Request Plan** – Work request plan will be created behind the scenes when there is more than one work request tied to the appointment request and will appear under the Work Plan hyperlink on Work Order Main.
- **Work Request** – Create work request for that maintenance appointment, a single work request will appear under the Work Request hyperlink on Work Order Main.
- **Work Order Main** – Add the work request plan and/or work requests to the unit when it is in for service at the requested/approved appointment time.

Please refer to the *System Flags Table* for a complete listing of all the flags.

Workflow

Maintenance Time Slot

The Maintenance Time Slot frame is the first step in setting up the Maintenance Appointment module and allows you to define valid appointment time slots for the various Maintenance Locations in your fleet organization.

You must set up Maintenance Time Slots for a location before users can request appointments at that location.

SAVE

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Maintenance Time Slot

Maintenance Location

Location:

FM - FM Parking Location

Reschedule Time Allowance (Hrs):

Weekly Time Slots (Loaded 7 records)

FM

Select	Day	Start Time	End Time	Default Appt Length (Hrs)	Adv Hours for Cancel (Hrs)
<input type="checkbox"/>	Sunday				
<input checked="" type="checkbox"/>	Monday	6:00 AM	7:00 PM	1.00	
<input checked="" type="checkbox"/>	Tuesday	6:00 AM	7:00 PM	1.00	
<input checked="" type="checkbox"/>	Wednesday	6:00 AM	7:00 PM	1.00	
<input checked="" type="checkbox"/>	Thursday	6:00 AM	7:00 PM	1.00	
<input checked="" type="checkbox"/>	Friday	6:00 AM	7:00 PM	1.00	
<input type="checkbox"/>	Saturday				

Time slots defined on this frame will be the valid slots available to requestors scheduling appointments on the Maintenance Appointment Request frame.

1. Select the appropriate maintenance location from the Location dropdown.
2. Enter the Rescheduled Time Allowance (in hours) – This value applies to the person approving the request.
3. Select the checkbox in the Select column to designate days of operation for the service location.
4. Select a Start Time and End Time for each selected day. Users will not be allowed to make appointment request outside of the designated time window.
5. Set a Default Appointment Length (in hours).
6. Enter a value for the amount of time needed in advance to cancel an approved appointment request – This value applies to the person making the request.
7. Select SAVE.

Notification Manager

Notifications should also be configured before requesting/scheduling appointments. To enable a specific notification, select 'No' from the Disabled dropdown on the right side of the notification box.

There are five different notifications that M5 offers for the Maintenance Appointment module that will allow you to ensure the proper entities are notified at the various stages in the appointment process:

1. Appointment Request Made
2. Appointment Request Approved
3. Appointment Request Denied
4. Appointment Request Canceled
5. Appointment Request Rescheduled

You can assign notifications to the email addresses of the Maintenance Location of the Unit, Owning Department of the Unit, Parking Location of the Unit, Using Department of the Unit, and the Vehicle Operator.

To assign any of the available entities to receive a notification, select the entity in the available column and select the >> button to move it over to the Assigned column. When finished, select SAVE at the top of the frame to update the notification settings.

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Event Information (APPOINTMENT REQUEST APPROVED)

Subject:
Appointment Request Approved for Unit :U

Message:
Your appointment request for Unit :U is Approved.
Appointment Requested DATE :AD
for Location :L

Disabled:
No

AvailableAssigned

APPT Contact
Maint Loc of Unit
Owner Dept of Unit
Park Loc of Unit

Message Variables

:AD = Appointment I
:L = Location
:MA = Maint APPT II
:U = Unit No

Event Information (APPOINTMENT REQUEST CANCELLED)

Subject:
Appointment Request Cancelled for Unit :U

Message:
Your appointment request for Unit :U is cancelled.
Appointment Requested DATE :AD
for Location :L

Disabled:
No

AvailableAssigned

APPT Contact
Maint Loc of Unit
Owner Dept of Unit
Park Loc of Unit

Message Variables

:AD = Appointment I
:L = Location
:MA = Maint APPT II
:U = Unit No

Event Information (APPOINTMENT REQUEST DENIED)

Subject:
Appointment Request Denied for Unit :U

Message:
Your appointment request for Unit :U is denied.
Appointment Requested DATE :AD
for Location :L

Disabled:
Yes

AvailableAssigned

APPT Contact
Maint Loc of Unit
Owner Dept of Unit
Park Loc of Unit
Using Dept of Unit

Message Variables

:AD = Appointment f
:L = Location
:MA = Maint APPT II
:U = Unit No

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RELATED ▾

Event Information (APPOINTMENT REQUEST MADE)

Subject:

New Appointment Request for Unit :U

Disabled: No ▾

Message:

You have new appointment request for Unit :U.
Appointment Requested DATE :AD
for Location :L

☒ Available

APPT Contact

>>

<<

☒ Assigned

Maint Loc of Unit

Owner Dept of Unit

Park Loc of Unit

Using Dept of Unit

Message Variables

:AD = Appointment I

:L = Location

:MA = Maint APPT II

:U = Unit No

Event Information (APPOINTMENT REQUEST RESCHEDULE)

Subject:

Appointment Request Reschedule for Unit :U

Disabled: Yes ▾

Message:

Your appointment for Unit :U is requested to
reschedule.
Appointment Reschedule DATE :AR
for Location :L

☒ Available

APPT Contact

>>

<<

☒ Assigned

Maint Loc of Unit

Owner Dept of Unit

Park Loc of Unit

Using Dept of Unit

Message Variables

:AR = APPOINTMEN

:L = Location

:MA = Maint APPT II

:U = Unit No

System Flags

There are two system flags that you also need to configure for this module: 5405 & 5406.

- System Flag 5405** – Require Requestor Notes on Maintenance Appt? (Y/N)
 If the value is set to "Y", the requestor is required to enter notes on the maintenance appointment pop up screen for requests. The default value is Y.
- System Flag 5406** – Require Primary Meter entry on Maintenance Appt Request? (Y/N)
 If the value is set to "Y", the Primary Meter field will display and be required on maintenance appointment pop up screen for requests. If set to "N", the Primary Meter entry field will not display or be required. The default value is N. This flag does perform the valid meter checks as any of the other meter validations would.

Maintenance Appointment Request

The Maintenance Appointment Request frame allows users to submit maintenance appointment requests for valid and available time slots at the maintenance location by using the calendar feature.

Access control for this frame is menu-based. Only users who are designated as department contacts or fleet coordinators and are allowed to make appointment requests should have this frame added to their menu.

To make an appointment request, navigate to the Maintenance Appointment Request frame and select the appropriate maintenance location from the 'Location' dropdown menu above the appointment calendar. The default location will be the user's login location. Any other available locations will be limited to the location groups for which the user is authorized.

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Maintenance Appointment Request

Location:
FM Parking Location

Completed ☒ Denied ☒ Canceled ☒

November 2019

month week day

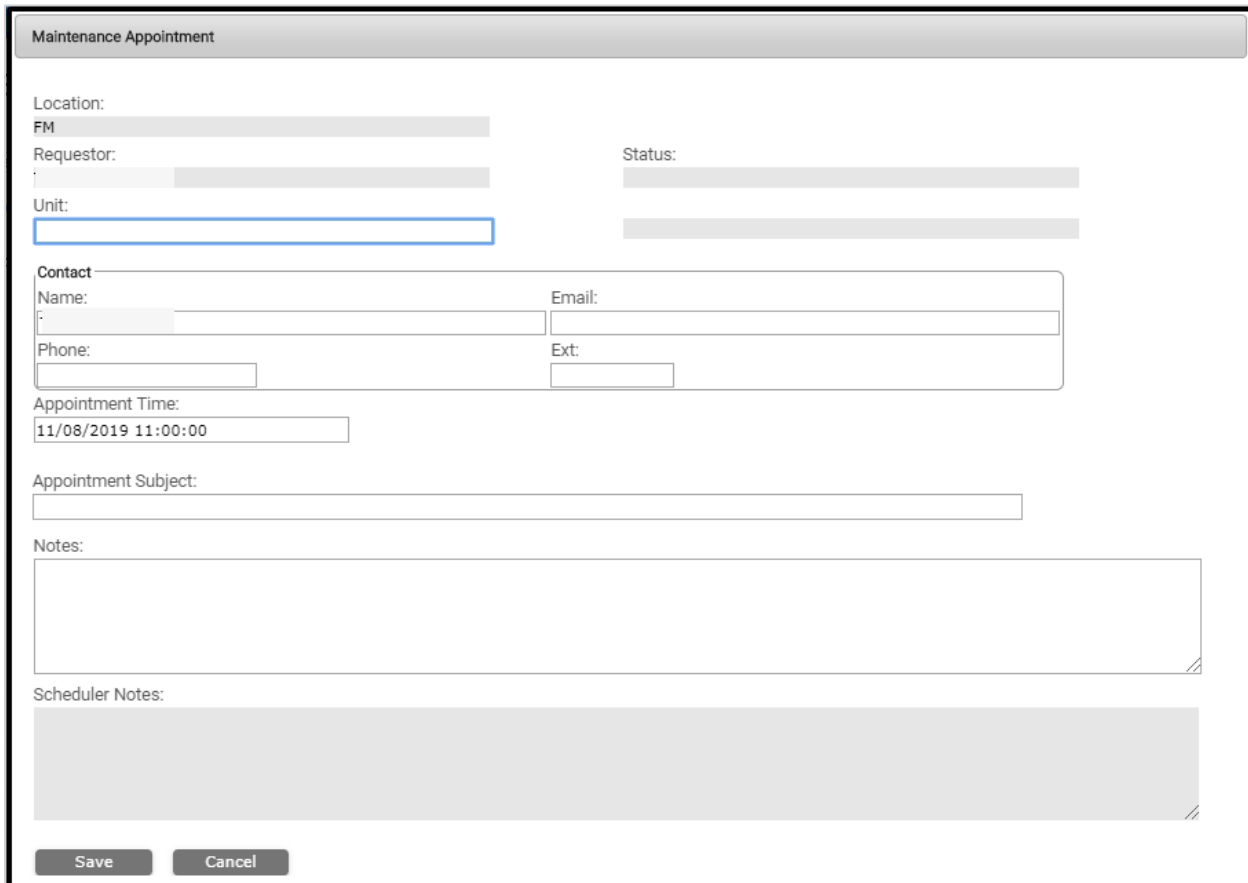
today < >

Mon	Tue	Wed	Thu	Fri	Sat	Sun
28 6a 00104 (APV)	29 6p DH1103 (REQ)	30	31	1	2 1p DH1103 (REQ)	3
4	5 6a 00104 (REQ)	6	7	8	9	10

There are three status filters on the top right of the calendar: Completed, Denied, and Canceled. Denied and Canceled will be selected automatically. The calendar also has three different views, Month, Week, and Day. You can drill down from the Month view to the Week view and from the Week view to the Day view.

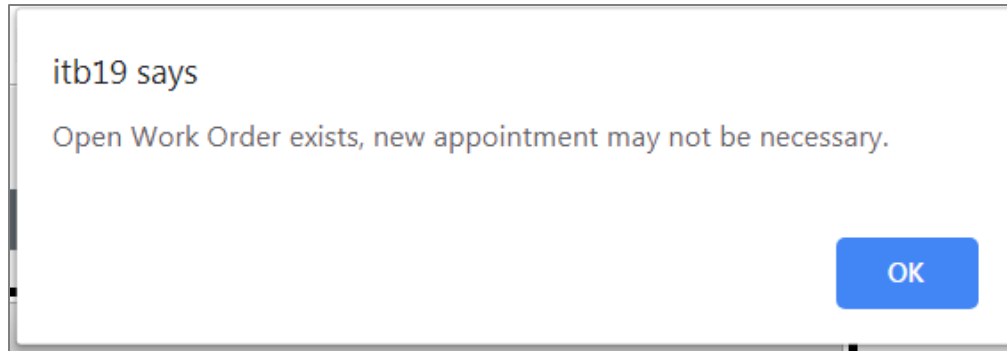
There are five request statuses and they each have a corresponding color on the calendar to indicate the status of the request.

1. **Blue** – Requested
2. **Green** – Approved
3. **Gray** – Completed
4. **Yellow** – Denied/Rejected
5. **Red** – Canceled



The screenshot shows a 'Maintenance Appointment' form. At the top is a title bar. Below it are several input fields: 'Location:' with a dropdown menu showing 'FM'; 'Requestor:' with a text field; 'Unit:' with a text field that has a blue border; and 'Status:' with a dropdown menu. Below these are 'Contact' fields: 'Name:', 'Email:', 'Phone:', and 'Ext:'. There is also an 'Appointment Time:' field showing '11/08/2019 11:00:00'. Below that is an 'Appointment Subject:' text field, followed by a 'Notes:' text area, and finally a 'Scheduler Notes:' text area. At the bottom are 'Save' and 'Cancel' buttons.

1. Select an open time slot using the Week or Day view to launch the Maintenance Appointment pop-up (valid hours of operation will appear in blue).
2. Enter the unit number of the unit needing service. If there is already an open work order for the unit at that location, a warning message will appear. A similar message will appear if there are any previously scheduled maintenance appointments outstanding.



3. The Location and Requestor will default automatically. The requestor is the Application User.
4. Enter a primary meter reading if required by System Flag 5406.
5. Contact information will default to the first M5 employee record associated with the unit based on the following order (but the data is editable):
 - a. Contact Email – From the Employee Main record associated with the Requestor (Application User record).
 - b. Operator – Employee Main operator assigned to the unit.
 - c. Using Department – Contact information stored in the associated Department Main record.
 - d. Parking Location – Contact information stored in associated Location Main record.
6. The Appointment Time will default in based on the day and time slot you select, but it can be changed to another valid date/time combination if necessary.
7. Enter the Appointment Subject. For example: OIL CHANGE.
8. If required by System Flag 5405, enter notes for the request.
9. Select SAVE when finished.

Appointments can be cancelled from this frame by the requester selecting the existing request and selecting the Cancel Appointment checkbox in the top right corner of the pop-up and selecting SAVE.

See the Notification Manager section above for more details on setting up email notifications for the various Maintenance Appointment Request events.

Maintenance Appointment Approval

The Maintenance Appointment Approval frame allows department contacts or fleet coordination personnel to approve, deny, or reschedule appointment requests. The calendar on this frame functions in much the same way as the calendar on the Maintenance Appointment Request frame.

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Maintenance Appointment Approval

Location:
FM Parking Location ▼

Completed ☐ Denied ☒ Canceled ☒

November 2019

month week day

today < >

Mon	Tue	Wed	Thu	Fri	Sat	Sun
28 <div>1</div>	29 <div>1</div>	30	31	1	2 <div>1</div>	3
4	5	6	7	8	9	10
11	12	13	14	15	16	17
18	19	20	21	22	23	24

As with the previous frame, access control for this frame is menu-based. Only users who are designated as department contacts or fleet coordinators and are allowed to approve/deny/reschedule appointment requests should have this frame added to their menu.

APPROVE AN APPOINTMENT

Maintenance Appointment

Location:

01MAIN

Requestor:

Status:

Approved

Unit:

9574

2002 DODGE RAM VAN 1500

Meter	Reading	Type
1	288794	M

Appointment Time:

11/12/2019 12:00:00

Appointment Subject:

OIL CHANGE

Notes:

Change oil.

Scheduler Notes:

Approved for date/time. Please arrive 20 minutes early.

Appointment Actions

☒ Approve
 ☐ Deny

1. Select an appointment in a "Requested" status (blue) to launch the approval details window shown above.
2. Select the 'Approve' radio button in the top right corner of the window.
3. Enter Scheduler Notes if required by System Flag 5405.

Notes:

Change oil.

Scheduler Notes:

Approved for date/time. Please arrive 20 minutes early.

Add	Work Req Job	Description	Location	Due Date	Earliest Date	Hrs Assignment	Plan	Plan Date
<input type="checkbox"/>	14987226 01-000-001	ADJUST Interior	FM	12/13/2017	12/11/2017	0		
<input type="checkbox"/>	14950509 02-001-001	Clean AIR CONDITIONING ASSEMBLY	01MAIN	12/14/2016	12/14/2016	0		

New Work Request

Save

Cancel

4. To create the Work Request for the appointment, select the 'New Work Request' button. You also have the option to select the Add box for any outstanding work requests you also wish to include in the appointment.
5. Enter the appropriate work request information and select Process Work Request and then SAVE when finished.
6. The appointment is now in an 'Approved' status and users can add the work request for the appointment on Work Order Main.

Notification Logic

- The system will not send a notification if there is an existing Maintenance Appointment in Approved or In Progress status. This applies to any notification that is initiated from the Maintenance Approval frame (provided it is configured and enabled).
- The Employee Main screen designer foundation includes an option in the Additional Information control to display Notification Hours. With this enabled, you can designate a notification window on individual employee records for when notifications are allowed to be sent.

APPROVE AN APPOINTMENT (with existing Work Requests/Work Plans)

The screenshot shows the 'Maintenance Appointment' form. At the top, there's a unit selection dropdown with '1' and '10' visible, and a time dropdown with 'M' selected. The 'Appointment Time' is set to '05/10/2017 11:00:00'. The 'Appointment Subject' is 'TIRE CHANGE'. The 'Notes' field contains 'Change front and back tires please.' Below this is the 'Scheduler Notes' field. A pop-up window titled 'Work Plans for Unit' is open, showing a table with columns 'Add Work Plan', 'Description', 'Hrs', and 'Plan Date'. The table has one row with a checked checkbox, '300', 'TEST PLAN', '0', and '04/14/2017'. Below the pop-up is the 'Unassigned Work Plan List (1)' table with columns: Add, Work Req, Job, Description, Location, Due Date, Hrs, Assignment, Plan, Plan Date, Vendor, and Parts. It contains two rows of work requests. At the bottom are 'New Work Request', 'Save', and 'Cancel' buttons.

Add	Work Req	Job	Description	Location	Due Date	Hrs	Assignment	Plan	Plan Date	Vendor	Parts
<input type="checkbox"/>	15021373	02-000-001	Clean Heater Vents	MAIN A	04/15/2017	0					
<input type="checkbox"/>	15021374	03-003-003	REPLACE NEW METER ASSEMBLY	MAIN A	04/15/2017	0					

If the Unit has an existing Work Plan you can select the Unassigned Work Plan hyperlink to add the Work Plan. Follow the same steps listed above and then do the following:

1. Select the Unassigned Work Plan hyperlink.
2. Select Add on the Work Plans for Unit pop-up next to the work plan you want to add.
3. Select X to exit the pop-up window.
4. The Work Plan will be added to the appointment. You can then choose which work requests from the plan you want to add by selecting or clearing the Add checkbox next to the job.
5. If there are other existing work requests that are not a part of a Work Plan, you can add those to the appointment as well by selecting the Add checkbox next to the job. They will automatically be assigned to the work plan. A work plan will be created behind the scenes if there are two or more work requests added to the appointment.
6. If there are multiple existing work requests added to the appointment, M5 will automatically create a work plan for those requests.

REJECT AN APPOINTMENT

The screenshot shows a 'Maintenance Appointment' form. The 'Appointment Actions' section in the top right has the 'Deny' radio button selected. The form contains the following fields:

- Location: MAIN A
- Requestor: THOMAS.BELSKIE
- Status: Denied
- Unit: VEHICLE 104 2000 TOYOTA AVALON XL
- Meter: 1, Reading: 10, Type: M
- Appointment Time: 05/03/2017 14:00:00
- Appointment Subject: OIL CHANGE
- Notes: Routine oil change.
- Scheduler Notes: Not enough open slots at this time. Please try again next week.

A 'New Work Request' button is located at the bottom left of the form.

1. Select the requested appointment.
2. Enter notes and primary meter reading if required by System Flags 5405 and 5406.
3. Select the Deny radio button.
4. Select the Save button to reject the request.

The color of the request will change from blue to red on the calendar.

Note: You can also change the appointment time length and extend the duration of the appointment by dragging down on the bottom of the appointment icon box by using the calendar feature. You can also drag and drop to another time slot (if available) for that appointment length on the week or day view. This can be done from one day to another or time slot to time slot.

A Note on SOLD Units

When a unit is sold, the event has the following impact on Maintenance Appointment functionality:

- If the Unit's appointment is in the past and:
 - Cancelled/denied/done: Ignore.
 - Requested but not approved: Mark as denied with automatic note.
 - Approved but not on a work order: Mark as cancelled with automatic note.
- If the Unit's appointment is in the future and:
 - Cancelled or denied: Ignore.
 - Requested but not approved: Mark as denied with automatic note if M5 is set to delete work requests (System Flag 2133 – Delete outstanding work requests when unit is set to disposal status).
 - Approved but not on a work order: Mark as cancelled with automatic note if M5 is set to delete work requests (System Flag 2133 – Delete outstanding work requests when unit is set to disposal status).

Work Order Main

When it is time for the unit to come in for service, you can add the Work Request or Work Plan associated with the appointment to the work order by selecting the Work Request or Work Request Plan List hyperlink.

Select the Add checkbox in the pop-up window to add the Work Request or Work Plan to the work order.

After all applicable jobs on the work order for the Maintenance Appointment are marked 'DON', the appointment request icon on the calendar will change from green to gray to indicate the appointment is complete.

PM Notification Review Manager

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PM Notification Review Manager

Notification Interface Statistics (Record 3 of 3)

Stat ID	Run Date	Total Processed	Pass	Fail	Successful Reprocess	Elapsed Time In Hrs.
78184	11/13/2019 07:28:41	71	9	62	0	0.00
78183	11/12/2019 12:02:37	30	5	25	0	0.00
SHOW ALL	Totals:	101	14	87	0	0.00

Filter Assistance (Loaded 6 records)

Enabled	Field	Operator	Value	High Value
<input checked="" type="checkbox"/>	Work Request Location	equal	FM	
<input type="checkbox"/>	Using Department	equal		
<input type="checkbox"/>	Operator	equal		
<input type="checkbox"/>	Job	equal		

Search

Interface Reviews (Loaded 0 records)

Send	Stat ID	Email Address	Open WO	Unit No	Description	Operator	Notification Hours	Job Meter	Description	Due Date	Last Done Date	Work Request Location	Using Department
------	---------	---------------	---------	---------	-------------	----------	--------------------	-----------	-------------	----------	----------------	-----------------------	------------------

The PM Notification Review Manager frame allows you to review, edit, and submit actions similar to how you can reprocess rejected transactions from the Interface Reject Manager frame.

You can select the batch run by double-clicking in the row that corresponds to the interface Stat ID that you want to view. You can also select SHOW ALL to view all batch runs at the same time.

These runs correspond to PM Notification System batch processes scheduled by using the Interface Manager frame.

From there, you can review and edit the email addresses and select the Send checkbox to send the email notification. After the send is successful, it will not display in the i-frame results.

Notification Logic

The system will not send a notification if there is an existing Maintenance Appointment in Approved or In Progress status. This applies to any notification that is initiated from the Maintenance Approval frame (provided it is configured and enabled).

- The Employee Main screen designer foundation includes an option in the Additional Information control to display Notification Hours. With this enabled, you can designate a notification window on individual employee records for when notifications are allowed to be sent.

Reports

Work Order Maintenance Appointment Report

The Work Order Maintenance Appointment Report displays appointment request details and can be filtered by location. The report displays the Unit Number, Using Department, Appointment/Date Time, Requestor, Work Request Number, Work Plan (for those that have two or more requests), and Status of the request.

<div> <div>WO Maintenance Appointment Report</div> <div>ASSETWORKS</div> </div>						
Report Printed: 7/21/2017 07:18:56 By User: THOMAS.BELSKIE						
Unit	Using Department	Appointment Date/Time	Work Request No.	Requestor	Work Plan	Status
Location: 01MAIN - 24th ST Maintenance Shop						
10002SM - Subject: TUNE UP Notes: notes	SMDEPT - Department 1	5/27/2017 05:00 - 5/26/	0	SWAPNIL.MISHRA		Requested
10017 - 2004 SULLIVAN DO185Q10JD Subject: BRAKES Scheduler Notes: Yes come on in Notes: Brakes making noises	15001951 - STREET LIGHTS	4/07/2017 08:00 - 4/07/	15015368	TRANG.SANGSTER		Approved
10024 - 2004 FORD E250 CARGO Subject: CHECK ALIGNMENT Scheduler Notes: Delay this until next PM Notes: Vehicle pulls to left	19001541 - ACCESS LEISURE	4/11/2017 06:00 - 4/11/	0	MBERNSTEIN		Denied
10351 - 2006 FORD E150 Subject: HEATER ISSUE Scheduler Notes: ok Notes: Heater is not warming vehicle sufficiently. Additional Work Requests: 15005369	14001361 - Electrical & Instrumentation	4/12/2017 07:30 - 4/12/	14997222	MBERNSTEIN	297	Approved
10633 - 2007 CHEVROLET SILVERADO Subject: INSPECTION Notes: inspection	14001411 - WATER DISTRIBUTION	4/14/2017 06:00 - 4/14/	0	DEBRA.WOLFE		Requested
11152 - 2009 INTERNATL 4300 Subject: PM Scheduler Notes: BPM Notes: PM A	14001421 - WASTEWATER COLLECTION	7/11/2017 06:30 - 7/11/	14973725	PRUCKER		Requested
11264 - 2010 FORD FUSION	11001391 - FLEET MANAGEMENT	5/04/2017 09:30 - 5/04/	0	MBERNSTEIN		Requested

Updates

Release	Section	Description
23.2	All sections	Applied miscellaneous writing style updates throughout the document.