



Anatomy of an M5 Report

Quick Guide

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Section 1. Anatomy of an M5 Report

The FleetFocus M5 application includes over 300 standard reports. It is an extensive collection of reports covering data from all facets of your fleet operations. Each report has similar components and is constructed and produced through a similar process. Below is a review of the reporting components and a discussion of how they are identified and completed in each step of the process in order to produce an accurate and meaningful report.

- **Report Title:** Every report is identified first by its title. The title will indicate the primary focus of the data it will contain. In this example the Unit Work Order History Report is examined.
- **Report Description:** Included with the title is a description of the report further identifying its structure and content. The Unit Work Order History is a Work Order (WO) listing by unit number and work order number showing the date the WO was opened, the meter reading, the work order reason, location and status, the date that it was closed and the cost. A unit total is shown for units with more than one work order in the date range selected.
- **Data Tables:** All data in the M5 application is stored in tables. The tables contain fields that store the individual, related pieces of data. The first step in constructing the report is to identify which tables will be used to provide the data fields for the report. Tables for the Unit Work Order History report are: VIEW_O_JOB, and VIEW_UNIT_WO.
- **List of Data Fields on Report:** The selected tables identify the fields that are available for the report process. The Unit Work Order History includes: Work Order No., Date Opened, Meter1, WO Location, WO Reason, WO Status, Date Closed, Job Cost and Total Cost. The remaining fields in the tables are also available for use as filters to refine your data selection process.
- **Report Production Statistics:** Each report that is run gathers production information that is included in the heading of the report. It displays your company name, the date and time it was run and application user who ran report.

Section 2. Technical Support

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

Customer Care is available 7AM – 7PM EST Monday through Friday.

Telephone: 800.900.8152

Email: M5Support@AssetWorks.com

Website: Community.AssetWorks.com

You can use this website to open issues, review the status of past submitted issues, review and download documentation, review additional training materials, and access the latest AssetWorks news. For secure access to the website, contact Customer Care by calling the listed telephone number.

Section 3. M5 Application Frame

Unit Work Order History Report Title

Parameter File Name: Option for saving report parameters.

Report Prompts

Group Units: Owning Dept ▼ Grouping and Sorting Options will vary for each report.

UnitWOHistFilters (Loaded 92 records)

Enabled	Field	Operator	Value	High Value
<input type="checkbox"/>	Unit Status	equal ▼		
<input checked="" type="checkbox"/>	Unit Number	between ▼	425651	425654
<input checked="" type="checkbox"/>	Model Year	equal ▼	2005	
<input checked="" type="checkbox"/>	WO Open Date	between ▼	01/01/2005	12/31/2005
<input type="checkbox"/>	Maintenance Location	equal ▼		
<input type="checkbox"/>	Parking Location	equal ▼		
<input type="checkbox"/>	Activity Code	equal ▼		
<input type="checkbox"/>	Billing Code	equal ▼		

Report Filter Selection

Schedule to Run Report

Each report is available on its own application frame and can be included on any menu desired. The Sample Menu includes the InfoCenter Reporting Menu which can be used to customize any menu you use. Below is the frame for the Unit Work Order History report. From this frame you will input the parameters you want to use to produce the report. You can store them in a Parameter file so you can easily reproduce the same report every time you need to.

The Report Prompts section contains options for grouping your data in different fashions on the report. Different reports will have different options in this section. You may have up to three different grouping and sorting levels and some reports will use grouping and sorting selections by default depending on the data being presented. Some reports also have options for including or excluding details, markup information and exporting to other application layouts.

The Unit Work Order History has one level of grouping available. Selecting the down arrow will show you all the choices you have for grouping Units on the report. Under this selected grouping level, it groups by Unit Number and Sorts by Open Date as defaults.

The next section below the Grouping is the filter area. Here you can get very specific about the type of data you want on the report. Enable the fields that you want to use for filtering data, pick the Operator that works best to identify the value in the field and enter the value or range of values. In this example we selected a small range of unit numbers and of those units only model year 2005 that had work orders opened during 2005. Note that selecting a field for filtering does not mean it will be included on the report. It becomes a filter only for qualifying which records will appear on the report.

Section 4. From the Frame to the Report

This illustrates how the selection areas on the report frame track to the actual report itself. Note that the Data Summary occurs based on the type of grouping selection. Each page also has a total line that includes each data group summary.

Unit Work Order History

Production Statistics AsseWORKS
Report Printed: 12/02/2015 09:14:36 By User: MICHAEL STEVENSON

Work Order	Date Opened	Meter 1	WO Location	WO Reason	WO Status	Date Closed	Job Count	Total Cost	
Owning Dept: 001 - testing forecast									
Unit No: 425654 - 2005 DODGE RAM 350									
160541	06/03/2005	0	NORMM	0	CANCEL	06/03/2005	1	0.00	
160542	06/03/2005	0	NORMM	P	CANCEL	06/03/2005	1	0.00	
160543	06/03/2005	0	NORMM	P	CANCEL	06/03/2005	1	0.00	
160545	06/03/2005	15	NORMM	P	CLOSED	05/26/2009	2	2,936.64	
160404	05/18/2005	0	NORMM	P	CANCEL	06/03/2005	2	0.00	
Data Grouping Summary							Unit No: 425654	Work Order Count: 5	2,936.64
Page Totals							Owning Dept: 001	Work Order Count: 5	2,936.64

When you have all your desired parameters in place select the Schedule button to run the report.

Section 5. Scheduling and Confirmation Frames

The image shows two side-by-side windows from a software application. The left window is titled 'Schedule Report' and contains settings for scheduling a report. The right window is titled 'Report Schedule Confirmation' and displays a list of schedule details.

Schedule Report Window:

- Title: Schedule Report
- Subtitle: Schedule information for /Reports/Unit/UnitMaintHistDisp.rpt
- Run Interval: Once (dropdown)
- Date: [Date Picker]
- Time: [Time Picker]
- Off Hours: [Button]
- Last Run: [Field]
- Output Destination:
 - ☐ Printer
 - ☒ In Bin
 - ☐ Email
 - ☐ File
- Report Group: System Admin (dropdown)
- Output Format: PDF (dropdown)
- ☐ Save as default for this report only
- ☐ Save as default
- Buttons: Schedule - Once, Cancel

Report Schedule Confirmation Window:

- Title: Report Schedule Confirmation
- Message: The UnitMaintHistDisp report has been successfully scheduled.
- Section: Schedule Information
 - Your report was assigned job number 72205 (indicated by an arrow).
 - The report is scheduled to execute immediately.
 - The report will execute on the v303reports2 Crystal APS.
 - In any server group.
 - The report output will be placed in your In Bin.
 - This report output may be viewed by all members of the Users report group.
 - The report output will be created in directory \\v303reports2/CEBIN/m5qaora/Users/ as a .pdf file.
- Button: Close

You have numerous options for scheduling. You can specify multiple reoccurring intervals, or only one. You can schedule for the specific time of day, perhaps to correspond to the end of a shift when all work is completed for the day.

You can also select different types of output, printers, email files with different formats, and again when you get it like you want it, save all the settings as the default for that report. When you have successfully scheduled the report, it will be assigned a Job Id number so you can track its production.

To run a report one time, immediately, select Schedule Once and you'll be done. This is typically how you will do it when you are first setting up the report and verifying that the parameters are correct for the data you anticipate. After you have it verified you can schedule the report for production runs.

Section 6. Report Menu and the Report Bin

When the Report has been completed, the Reports Menu will indicate that a report is ready for viewing.

Home Sample Menu Change Menu ⁴⁷ Favorites ⁺ History Dashboard Reports ⁰ Notifications ⁰

Save Undo Refresh Delete Find

Report Bin

Reports run by or visible to the current user (Loaded 96 records)

Delete	Report Name	Size	Id	Type	Created	By
<input type="checkbox"/>	Using Dept PM Summary V15.0	99663	38159	pdf	08/27/2015 14:34:54	AMY.KUNKLE
<input type="checkbox"/>	Work Requests V15.0	91157	35935	pdf	08/24/2015 13:44:14	CERYS.LEWIS
<input type="checkbox"/>	Work Requests V15.0	84562	35923	pdf	08/24/2015 13:33:22	CERYS.LEWIS
<input type="checkbox"/>	NYC Fleet Vehicle Listing v15.0	77572	30990	pdf	07/30/2015 12:50:44	ADAM.RHOADS
<input type="checkbox"/>	NYC Fleet Vehicle Listing v15.0	74340	30970	pdf	07/30/2015 12:44:48	ADAM.RHOADS
<input type="checkbox"/>	NYC Fleet Vehicle Listing v15.0	74821	30960	pdf	07/30/2015 12:39:55	ADAM.RHOADS
<input type="checkbox"/>	NYC Fleet Vehicle Listing v15.0	64755	30950	pdf	07/30/2015 12:29:20	ADAM.RHOADS
<input type="checkbox"/>	NYC Fleet Vehicle Listing v15.0	63750	30920	pdf	07/30/2015 12:12:32	ADAM.RHOADS
<input type="checkbox"/>	NYC Fleet Vehicle Listing v15.0	64163	30910	pdf	07/30/2015 12:10:26	ADAM.RHOADS
85 items(s) found						
<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	Users Group Reports				
<input type="checkbox"/>	Unit Work Order History V14.0	79358	72205	pdf	12/02/2015 13:03:51	MICHAEL.NICKERSON
<input type="checkbox"/>	Unit Work Order History V14.0	89565	71997	pdf	12/02/2015 09:14:57	MICHAEL.NICKERSON
<input type="checkbox"/>	Unit Work Order History V14.0	84411	71937	pdf	12/02/2015 08:55:05	MICHAEL.NICKERSON
3 items(s) found						

Select Reports and the Report Bin will open, and you can locate your completed report by finding the Id number and your username. Select the Blue link for your report and it will open. In this example it is in the PDF format and will open in your PDF viewer.

Section 7. Sample Report: Unit Work Order History – Page One

Report Title	Unit Work Order History					Production Statistics		AssetWORKS	
						Report Printed: 12/02/2015 09:14:56 By User: MICHAEL NICKERSON			
Data Fields	Work Order	Date Opened	Meter 1	WO Location	WO Reason	WO Status	Date Closed	Job Count	Total Cost
Grouping	Owning Dept: 001 - testing forecaster								
Report Data	Unit No: 425654 - 2005 DODGE RAM 350								
	160541	06/03/2005	0	NORMM	0	CANCEL	06/03/2005	1	0.00
	160542	06/03/2005	0	NORMM	P	CANCEL	06/03/2005	1	0.00
	160543	06/03/2005	0	NORMM	P	CANCEL	06/03/2005	1	0.00
	160545	06/03/2005	15	NORMM	P	CLOSED	05/26/2009	2	2,936.64
	160404	05/18/2005	0	NORMM	P	CANCEL	06/03/2005	2	0.00
	Data Summary					Unit No: 425654	Work Order Count: 5	2,936.64	
	Page Totals					Owning Dept: 001	Work Order Count: 5	2,936.64	
FleetFocus M5 - UNITMAINTHISTDISP - Unit Work Order History V14.0									
Page 1 of 3									

Section 8. Sample Report: Unit Work Order History – Page Two

Report Title	Unit Work Order History					Production Statistics		AssetWORKS	
						Report Printed: 12/02/2015 09:14:56 By User: MICHAEL NICKERSON			
Data Fields	Work Order	Date Opened	Meter 1	WO Location	WO Reason	WO Status	Date Closed	Job Count	Total Cost
Grouping	Owning Dept: 0040 - ACCOUNTING								
	Unit No: 425651 - 2005 DODGE TAXI								
Report Data	914690	11/29/2005	0	NORMM	1	CLOSED	11/30/2005	2	1,689.95
	914691	11/29/2005	0	NORMM	1	OPEN		1	1,669.24
	160480	05/26/2005	0	NORMM	1	CLOSED	02/16/2006	2	218.61
	Data Summary					Unit No: 425651	Work Order Count: 3	3,577.80	
	Page Summary					Owning Dept: 0040	Work Order Count: 3	3,577.80	
FleetFocus M5 - UNITMAINTHISTDISP - Unit Work Order History V14.0									
Page 2 of 3									

Section 9. Sample Report: Unit Work Order History – Page Three

Last Report Page Summary		Report Total: Work Order Count: 8	6,514.44
<div style="border: 2px solid red; padding: 2px; display: inline-block;">Unit Work Order History</div>			
Report Title:	UNITMAINTHISTDISP - Unit Work Order History V14.0		Report Title
Report Author:	FleetFocus M5		Production Statistics
File Path:	C:\Program Files (x86)\Business Objects\BusinessObjects Enterprise 12.0\Data\procSched\V303REPORTS2\CrystalRep		
	Wed Dec 02 2015 07:14:56	Report User:	MICHAEL.NICKERSON
TZ:	Central Standard Time		
DLL Version:	2015.08.21		Development History of Report
Report Comments:	5/31/06 - Focus No 7069 6/14/06 - Focus No 7996 & No 3053 01/08/07 - Focus No. 12153 03/28/07 - Focus No. 13917 07/03/07 - Focus No. 15696 08/01/07 - Focus No. 12572 08/07/07 - Focus No. 16254 02/08/08 - Focus No. 18696 01/21/09 - Focus No. 22842 12/10/09 - Focus No. 24193 09/07/10 - Focus No. 32152 06/23/11 - Focus No. 28649 06/18/12 - Focus No. 39905 07/03/12 - Focus No. 39906 01/21/15 - FMV-2886 08/07/2015 - FMV-3791		
<div style="border: 1px solid red; padding: 2px; display: inline-block;">Parameters and Selection Filters</div>			
First Grouping:	OD Owning Department Grouping		
Second Grouping:			
Third Grouping:			
Sorted By:			
From Date:			
To Date:			
Option 1:			
Option 2:	Data Selection Filters		
Selection Filters:	{view_unit_wo.unit_no}>='425651' and {view_unit_wo.unit_no}<='425654' and {view_unit_wo.year} = 2005 and {view_unit_wo.open_dt}>= date(2005,1,1) and {view_unit_wo.open_dt}<= date(2005,12,30) //Q=		

Section 10. Updates

The following updates apply to the *Anatomy of an M5 Report Quick Guide*.

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