AssetWORKS

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

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.

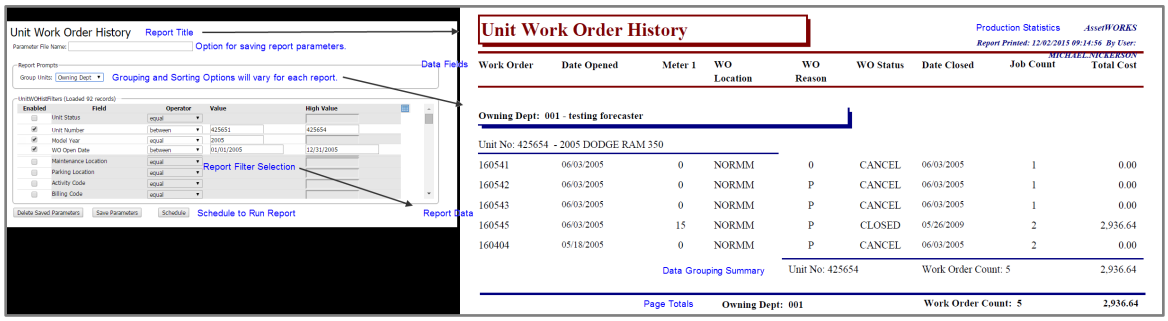
The Report Prompts section contains options for grouping your data in different fashions on the report. Different reports will have different options in this section. You may have up to three different grouping and sorting levels and some reports will use grouping and sorting selections by default depending 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.

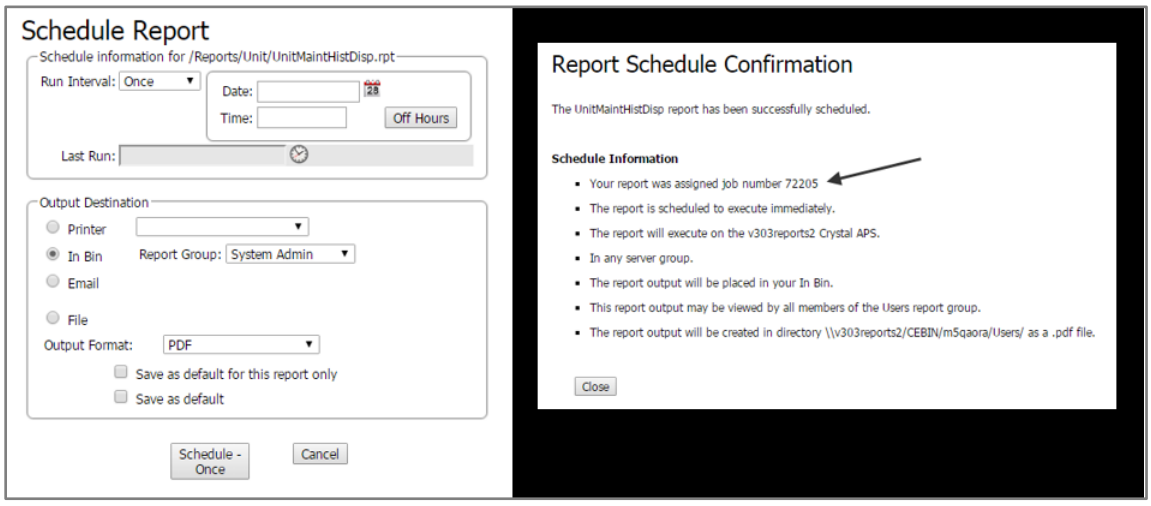
Section 4. From the Frame to the Report

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.



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

Section 5. Scheduling and Confirmation Frames



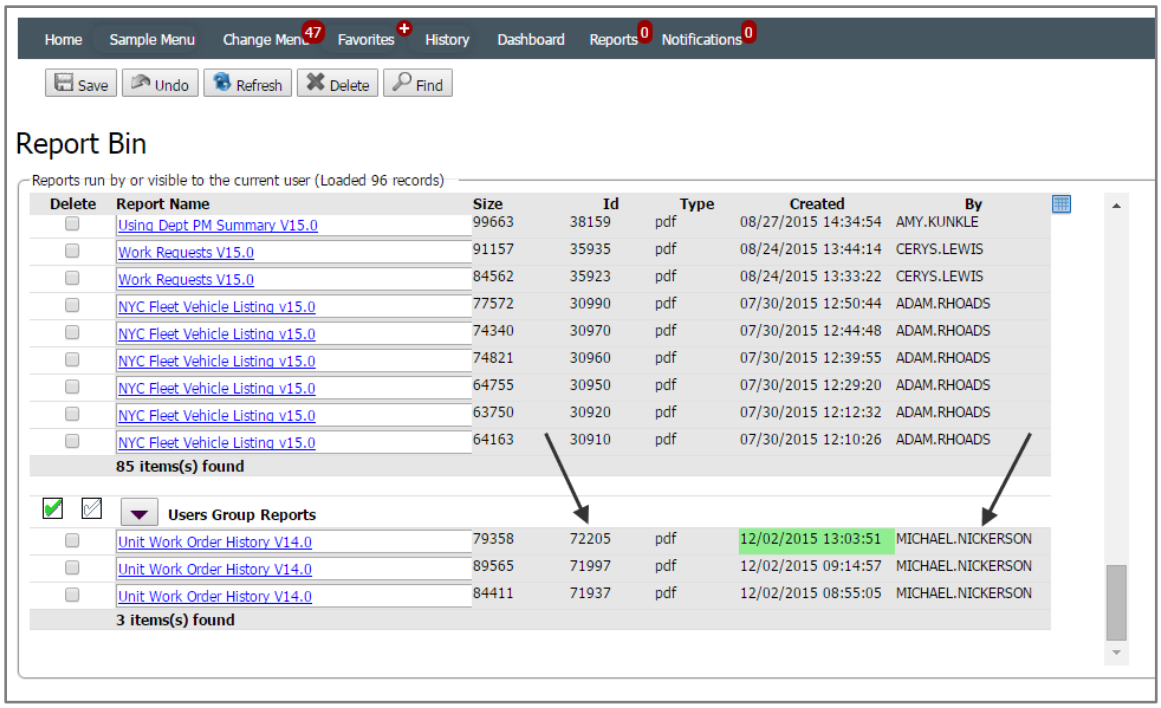
You have numerous options for scheduling. You can specify multiple reoccurring intervals, or only one. You can schedule for the specific time of day, perhaps to correspond to the end of a shift when all work is completed for the day.

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.

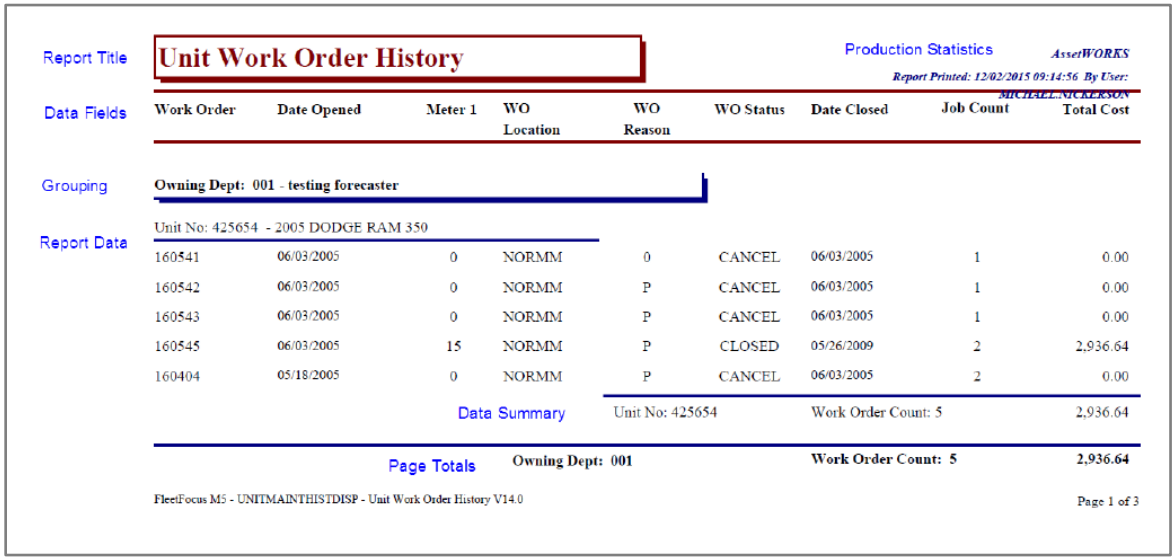
Section 6. Report Menu and the Report Bin

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



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

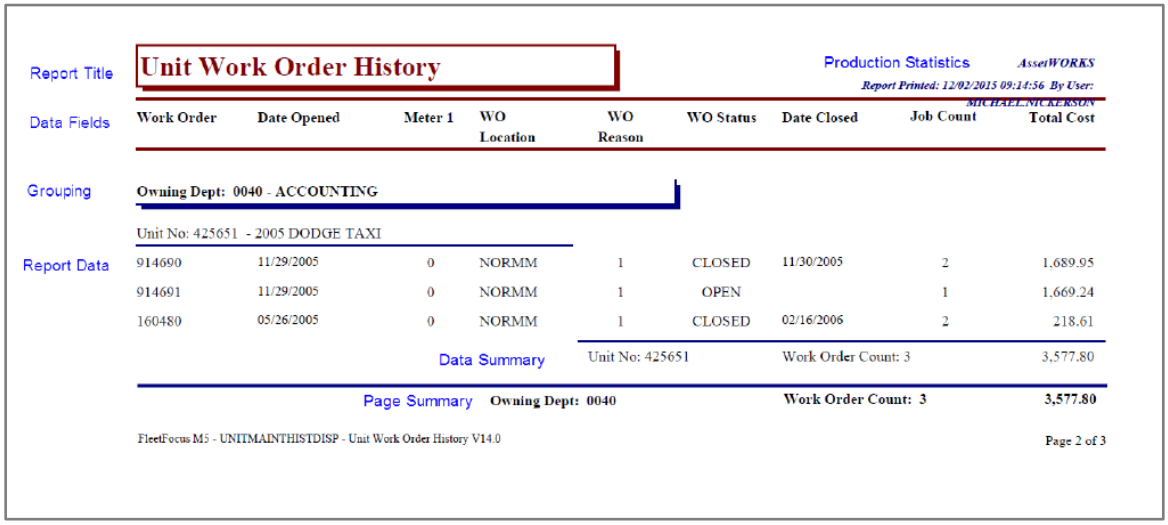
Data Fields

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**

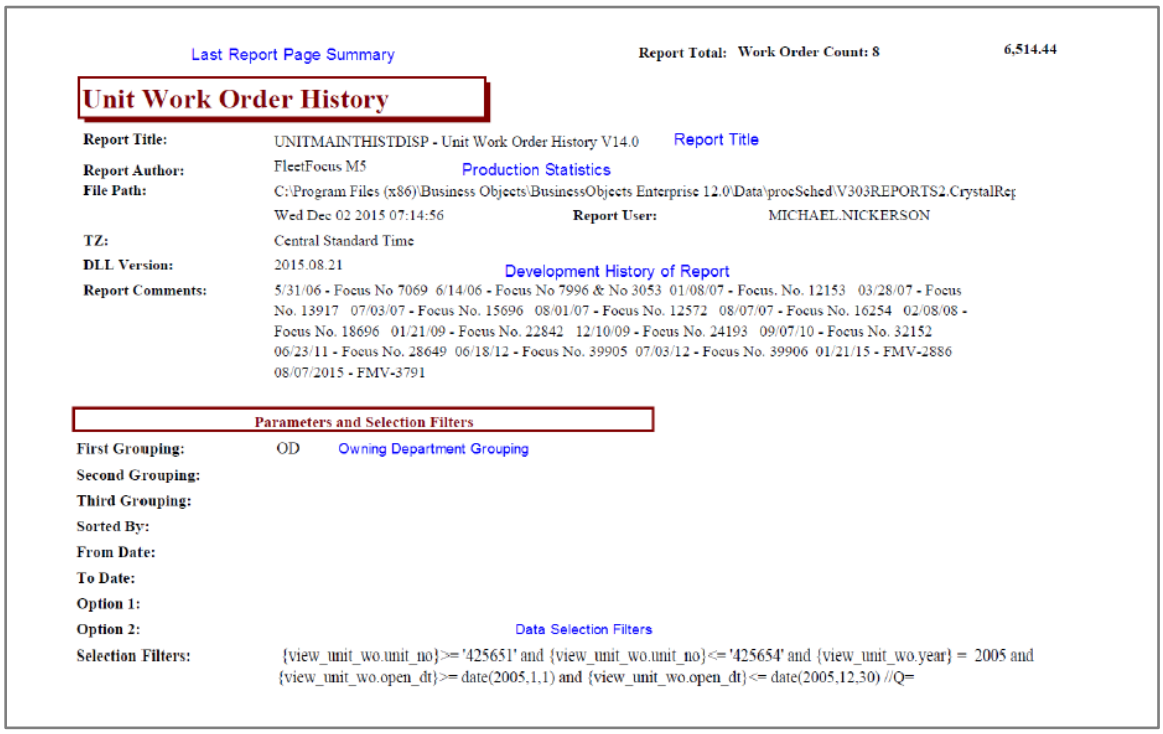
FleetFocus M5 - UNITMAINTHISTDISP - Unit Work Order History V14.0

Page 1 of 3

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



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



Last Report Page Summary

Report Total: Work Order Count: 8 **6,514.44**

Unit Work Order History

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

Parameters and Selection Filters

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.