



Equipment Focus

Training Guide

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Section 1. Overview

The **Equipment Focus** module offers clients the ability to maintain and track equipment within the M5 application. In summary, the functionality allows equipment to be ordered, received, issued (check-out) and returned (check-in), and transferred to another location within the **Equipment Focus** module. It includes the ability to:

- Associate equipment to a work order to use for specific work performed.
- Open a work order on the equipment itself.

Charging back the use of the equipment (equipment associated to work orders) involves the M5 billing module to accommodate this requirement. Initially, this development initiative was centered just on tools. In order to expand this functionality, M5 now uses a broader term, Equipment so as not to limit its usefulness specifically to tools. A tool will now be a type of equipment.

Equipment tracking exhibits many of the same characteristics as serialized parts or an individual unit, the main difference being the ability to give or loan a piece of equipment to a person. Equipment is not charged out like a part is. There are other qualities about equipment that differ from parts, such as the ability to track it by a SKU number whereas the actual equipment itself will have different manufacturers and ID's. An employee can own a piece of equipment (Tech's that own their own tool box and tools) and use them to perform work on a work order.

Equipment has the option to store and track a serial number. It is important to be able to group a single piece of equipment to others by SKU number for reporting and querying on availability and whereabouts of a specific kind of equipment. Users can assign equipment to a work order for the purpose of specific job tasks.

When a piece of equipment needs maintenance, users can open a work order on that equipment just like they can open a work order for a unit that needs maintenance. The ability to charge a rental rate for the use of an equipment is included in this module.

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 telephone number listed.

Section 3. Configuration

Unit Asset Types

Clients licensed for the **Equipment Focus** module will see this frame in M5. In M5 equipment is considered a Type of unit or Asset. These asset types are predefined by AssetWorks and hard coded. The **Description** can be modified by the client. Clients can set the capabilities which control functionality for each asset type.

These are set by changing the flag to **Yes** or **No**. This determines if this **Asset Type** will have that specific functionality (for example, if the Work Order is set to **Yes** then that Asset Type can have a work order created to record repairs). The functions that users can turn on or off for a specific asset type:

- Accident
- Accounting
- Availability
- Check Out
- Billing
- Forecasting
- Fueling
- License
- Meter
- Motor Pool
- Procurement
- Telematics
- Warranty
- Work Order

Unit Asset Types																
Codes (Loaded 11 records)																
Asset Type	Description	Accident	Accounting	Availability	Check Out	Billing	Forecasting	Fueling	License	Meter	Motor Pool	Procurement	Telematics	Warranty	Work Order	Disable
ACCESSORIES	Accessories	No	No	No	Yes	No	No	No	No	No	No	No	No	No	No	<input type="checkbox"/>
ATTACHMENTS	Attachments	No	No	No	Yes	No	No	No	No	No	No	No	No	No	No	<input type="checkbox"/>
ELECTRONIC	Electronic	No	No	No	Yes	No	No	No	No	No	No	No	No	No	No	<input type="checkbox"/>
HIRE	Hire	No	No	No	No	No	No	No	No	No	No	No	No	No	No	<input type="checkbox"/>
MOBILE UNITS	Mobile Units	No	No	No	Yes	No	No	No	No	No	No	No	No	No	No	<input checked="" type="checkbox"/>
PLANT	Plant	No	No	No	No	No	No	No	No	No	No	No	No	No	No	<input type="checkbox"/>
STATIONARY	Stationary	No	No	No	Yes	No	No	No	No	No	No	No	No	No	No	<input type="checkbox"/>
TEMPORARY	Temporary	No	No	No	No	No	No	No	No	No	No	No	No	No	No	<input type="checkbox"/>
TOOLS	Tools	No	No	No	Yes	No	No	No	No	No	No	No	No	No	No	<input type="checkbox"/>
TRAILERS	Trailers	No	No	No	Yes	No	No	No	No	No	No	No	No	No	No	<input type="checkbox"/>
UNIT	Metered vehicle	Yes	Yes	Yes	Yes	Yes	Yes	Yes	Yes	Yes	Yes	Yes	Yes	Yes	Yes	<input type="checkbox"/>

Equipment Conditions

The *Equipment Conditions* frame allows you to create a valid list of condition codes such as new, good, fair, poor, scrap, missing, or stolen. This allows for the effective management of the equipment throughout their life cycle and ensures it is kept in a safe, usable condition.

Commonly used codes are **New**, **Good**, **Fair**, and **Poor**. Clients can add as many conditions as needed to meet their requirements. There is an option, in the form of a flag checkbox, to **Disallow Check Out** for a particular condition code to signify the equipment is in bad condition and needs repair. This ensures the equipment is not checked out when it is in a substandard condition and not suitable for safe use.

To create a new Equipment Conditions Code, select the blank **Code** field and type in a new code. This field has a limit of six characters (alphanumeric). Then, enter a **Description** for the new code. This field has a limit of 20 characters (alphanumeric), (for example, POOR – Poor Condition or GOOD – Good Condition).

If the **Disallow Check Out** checkbox is selected and a job code and reason are entered, when that condition is selected on equipment check in, a work request will be created so the equipment can be inspected or repaired. Select **SAVE** to complete.

To modify an existing Equipment Conditions Code, enter a new **Description** or change the **Disallow Check Out** checkbox. You can also edit the job information. After all changes are made, select **SAVE** to update the record.

You may also disable a **Code** by selecting the Disabled checkbox in the row of the code you want to disable. After selecting the checkbox, select **SAVE** at the top of the frame to disable the condition code.

You can delete a condition **Code** provided it is not in use on any other tables in the system. If the code is in use, you will not be able to delete it from the list.

Equipment Conditions (Loaded 8 records)						
Code	Description	Disallow Check Out	Job Code	Job Reason	Job Priority	Disabled
BAD	bad	<input type="checkbox"/>				<input type="checkbox"/>
DBL	Disabled	<input type="checkbox"/>				<input type="checkbox"/>
DIS	disallow check out	<input type="checkbox"/>				<input type="checkbox"/>
GOOD	good	<input type="checkbox"/>				<input type="checkbox"/>
TEST01	test 0000000000000001	<input type="checkbox"/>				<input type="checkbox"/>
TEST03	test	<input type="checkbox"/>				<input type="checkbox"/>
TEST04	test 04	<input type="checkbox"/>				<input type="checkbox"/>
TEST05	test 05	<input type="checkbox"/>	01-00-001	3	1	<input checked="" type="checkbox"/>
		<input type="checkbox"/>				<input type="checkbox"/>

Equipment Return Reasons

The *Equipment Return Reasons* frame allows you to create and maintain codes that indicate why a piece of equipment was returned (for example, Broken. Identified as unusable after being checked out). These codes are user-defined but can be used to flag a piece equipment for removal from your inventory to prevent damage or injury.

To create new *Equipment Return Reasons*, select the blank **Code** field and enter a new code. This field has a limit of six characters (alphanumeric). Then, enter a **Description** for the new code. This field has a limit of 20 characters (alphanumeric). For example, BROKE – Broken will not work or WT – Wrong Tool.

You can modify the description of existing return reasons. To modify a description, select the **Description** field and type a new description over the existing one. You can also select or clear the **Default** checkbox.

Select **SAVE** to update the record.



Note: Only one **Default** flag can be set.

To disable *Equipment Return Reasons*, select the **Disabled** checkbox in the row of the code you want to disable. Select **SAVE** to disable the code.

You can delete a code provided it is not in use on any other tables in the system. If the code is in use, you will not be able to delete it from the list. To delete a return reason that is not in use, select the row to make it active. Select **DELETE**, the selected row highlights red. Select **SAVE** to delete the record.

Equipment Return Reasons				
Equipment Return Reasons (Loaded 6 records)				
Code	Description	Default	Disabled	
211	Reg 21.1.0 Eq Return	<input type="checkbox"/>	<input type="checkbox"/>	
DIS	Disabled	<input type="checkbox"/>	<input checked="" type="checkbox"/>	
DTYFC2	Updated Description	<input type="checkbox"/>	<input checked="" type="checkbox"/>	
RET	Return	<input checked="" type="checkbox"/>	<input type="checkbox"/>	
RKGAZ1	Updated Description	<input type="checkbox"/>	<input checked="" type="checkbox"/>	
TEST 1	ci x a lcf85f1c 6g2	<input type="checkbox"/>	<input type="checkbox"/>	
		<input type="checkbox"/>	<input type="checkbox"/>	

Equipment Types/SKU

The *Equipment Types/SKU* frame allows you to create codes that group equipment together by functionality and identify each equipment with an asset number and description. These codes extend the system's ability to manage the equipment for fleet usage.

To create a new Equipment Type/SKU (stock keeping unit) enter the new **Equipment Type**, up to 30 characters. Press tab or enter. You will be asked to confirm the new code. Enter a new **Description**. Enter a new **SKU** for the type, up to 30 characters, and a **Description**, up to 30 characters. The *Equipment Types/SKU* frame allows a SKU to have the **Serial** checkbox selected. This requires the serial number on *Unit Main* when System Flag 1055 is set to **N**. Select **SAVE** when complete.

To view or modify an existing type and its SKUs, enter or select the **Equipment Type** from the List of Values. The **Description** and **SKU** assignments display. You can modify the **Description** of the type or its SKUs or disable the SKU.

To delete a SKU select its row and select **DELETE**. The row highlights red. Select **SAVE** to remove the record. To delete the type, select the **Equipment Type** field and select **DELETE**. The row highlights red. Select **SAVE** to remove the record. You are unable to delete the code if it is in use on another table in the system.

Equipment Types/SKU

Equipment Type

Equipment Type: Description:

Equipment Types (Record 0 of 1)				
SKU	Description	Serial	Disabled	
SKU0002	SKU0002 DESCRIPTION	<input checked="" type="checkbox"/>	<input type="checkbox"/>	
<input style="width: 100%;" type="text"/>	<input style="width: 100%;" type="text"/>	<input type="checkbox"/>	<input type="checkbox"/>	

Unit Main

The following tracking equipment fields on *Unit Main* within the *Unit Codes* section:

- Equipment Type
- SKU
- Condition Code
- Check In / Out Status
- Employee Owned flag
- Employee Number
- Calibration Date
- Calibration Expires

Screen Designer on a *Unit Main* frame can be customized to only have Equipment related data.

Unit Main

Unit Information

Unit: Add New

Description: Status:

Alternate Unit No.:

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

Year / Manufacturer / Make / Model

Year	Manufacturer	Make	Model
<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>

Unit Codes

Serial Number:

MCC:

Activity:

Tech Spec Number: Gross Vehicle Weight:

Asset Category:

Asset Class:

Asset Type: Equipment Type: SKU:

License Class Code: License Class Code Description:

Retrofitted Y/N Retrofitted Description:

Billing: Type: Effective Date: Rental rate:

High Priority: Passive GPS: Driver Behavior:

Calibration Date: Calibration Expires:

Condition Code: Employee Owned: Employee Number:

Check In/Out Status: Check In/Out Date:

Section 4. Process

Equipment Request

The *Equipment Request* frame allows you to create a request in the system to use a piece of equipment. A number is assigned to each request in order to manage the pickup and return of the equipment. More than one SKU can be included on a request. **Notes** can be entered for each request. The notes are viewable from the *Equipment Check Out* frame.

To create a new Equipment Request, select the **New Equipment Request** button. Enter the **Request Employee No**, this is the employee making the request. **From Location** is a valid location the request is requesting from. In the **To** field select from dropdown what the request is for: Department, Employee, Location, Unit, Work Order, or Direct Account. Enter the number that relates to the item selected in the **To** field (for example, if employee is selected a valid employee ID is required) or select from the List of Values for your selection.

In the *Equipment Request* i-frame, enter the **Equipment Type**, **SKU** (if not populated), **Qty**, and the **Pick Up By** employee. Enter the **Est Check Out**, **Est Return** date and times. The **Status** defaults to *Open*, and the **Status Date** is the current date. Select **SAVE** to create the request.

To view or modify an existing request enter or select the **Request #**. You can modify the SKU requests based on the status. If the SKU has not been checked out yet, you can modify the details and change the status. You can also delete it. Select **DELETE**, the row highlights red. Select **SAVE** to remove the record.

To add an additional SKU to the request, within the i-frame go to the first blank row of the table and enter a new **Equipment Type** and **SKU**. Enter the quantity and the number of the employee who will be picking it up. **The Est. Check Out, Est Return**, and **Status** dates are the dates of the previous SKU requested. You can modify those if desired. The **Est. Check Out** date must be before the **Est Return** date. You can enter **Notes**, as applicable. Select **SAVE** to complete changes.

Notifications

The **EQUIPMENT REQUEST CREATED** notification is sent when a user creates a new *Equipment Request*. The notification can be configured on the *Notification Manager* frame or on *Location Main (Notifications)* when **Location** is set on the *Notification Manager* frame.

The screenshot shows the 'Equipment Request' form. It includes a 'Request #' field with a 'New Equipment Request' button, a 'Request Employee No.' field, a 'From Location:' field, and a 'To:' dropdown menu. Below the form is a table header for 'Equipment Requests (Loaded 0 records)' with columns: Equipment Type, SKU, Qty, Pick Up By, Est Check Out, Est Return, Status, Status Date, and Notes.

Equipment Check Out

The *Equipment Check Out* frame allows you to complete the issuing (check out) transaction of an equipment request. The **Location** defaults to your current location. Enter the **Requested By** employee number and the **Request ID**, and then select **Retrieve**. The details of the request display. Enter the **Issued By**, **Picked Up By**, and **Responsible Party** employee numbers. You can enter additional **Contact Name**, **Phone**, and **Email** address information, as applicable.

Complete the *Equipment Check Out* section with the **Equip No**, **Equipment Type**, **SKU**, **Check Out Date** and **Est Return Date**. You can update the **Condition** field and **Notes**. Select **SAVE** when you are done. This frame can be used to check out equipment without an Equipment Request. Equipment can be checked out without a request by entering the required fields on the *Equipment Check* out section.

Notifications

The **EQUIPMENT CHECKED OUT** notification is sent when a user checks out equipment. The notification can be configured on the *Notification Manager* frame or on *Location Main (Notifications)* when **Location** is set on the *Notification Manager* frame.

Equipment Check Out

Equipment Check Out

Location: FM

Requested By: Request ID:

Check Out To:

Issued By:

Picked Up By:

Responsible Party:

Contact Name: Phone:

Email:

Equipment Requests (Loaded 1 records)									
Request ID	Request Line #	Equipment Type	SKU	Qty Requested	Qty Checked Out	Est Check Out Date	Check Out To	Check Out Value	
385	1	ADR TEST	123	1	0	03/20/2019 21:08:52	Employee	1	<input type="checkbox"/>

Equipment Check Out (New record number 1)							
Equip No	Equipment Type	SKU	BIN	Check Out Date	Est Return Date	Condition	Notes
<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>

Equipment Check In

The *Equipment Check In* frame allows you to complete the return transaction of an equipment request. The **Checked Out Location** displays from the issue transaction.

The **Check In Location** is your current location. Enter the **Check In Employee**, **Checked Out To**, and a **Check Out Date Range**. Select **Retrieve**.

The list of checked out equipment display within the *Equipment Check In* i-frame. Locate the equipment being returned and select the **Check In** checkbox. Enter **Condition**, **BIN**, and **Return Reason**. To transfer the part you can choose a different **Check In Location**. Select **SAVE** to check in equipment.

Equipment Check In

Equipment Check In

Check In Location:

Check In Employee:

Checked Out Location:

Checked Out To:

Responsible Party:

Check Out Date Range:

Equipment Type/SKU:

Equipment No:

Equipment Check In (Loaded 0 records)

Check In Equip No	Equipment Type	SKU	Check In Date	Condition	BIN	Return Reason	Checked Out Location	Checked Out To	Checked Out To Number	Notes

Equipment Check Query

The *Equipment Check Query* frame displays a list of the equipment that is currently checked out or equipment that was checked out and then returned. Enter filters for your query (for example, **Assigned To**, **Responsible Party**). Select **Retrieve**. The details of the check out and in transactions display as view only within the *Equipment Check Query* i-frame.

Equipment Check Query

Equipment Check Query

Assigned To:

Check Out Location: Check Out/In Status:

Responsible Party:

Check Out Date From: To:

Check In Date From: To:

Check In Location:

Equipment No: Equipment Type:

SKU: Return Reason:

Request ID: Employee Owned:

Equipment Check Query (Loaded 0 records)

Equip No	Equipment Type	SKU	Check Out Date	Check In Date	Check Out Location	Check In Location	Out Condition	In Condition	Return Reason	Assigned To	Assigned To Number	Resp. Party	Request ID	Notes
(No records found)														

Standard Job MCC

The Standard Job MCC can be created to forecast calibration of equipment. Select the **Calibration** checkbox within *Job Defaults* on the **Forecaster** tab. If selected and the job is added to an equipment work order, the unit's calibration date is updated when the job is marked as **DON** on the work order. Standard jobs can be forecasted if the **Unit Asset Type** is identified to be included in the forecaster.

M5 can restrict system and assembly codes from being entered or selected throughout M5 by MCC, asset type and category codes. Job restriction is not required but helps to define system and assembly codes to perform jobs that make sense for the equipment. On the *System Code* frame select the **Restrictions** link on each system code and set restricted by MCC's Codes, Asset Types, Category Codes, Tech Spec Codes, Department Groups, or Location Groups, as applicable. When there are restrictions on a system code it highlights in red.

Standard Job MCC

Job / MCC

Job Code:

MCC:

+
Schedule
Forecaster
Loc Override
Subjobs
Test Suites

Forecaster Information

Scheduling Basis:

Recurring Job:

Seasonal Restriction:

Maintain Intervals In Cycle:

Push next occurrence to the end of month:

MCC Season

Starting:

Ending:

Job Defaults

Location Code:

Visit Reason:

Priority: Overdue Priority:

Calibration: Prevent Job Reason Changes:

Work Order for Equipment

Work requests and work orders can be created on equipment to make repairs or inspections to ensure the equipment is in good working order. As equipment is just a type of asset, they have full work order functions if the **Unit Asset Type** is configured to allow.

Work Requests can be automatically created during the check-in process if the condition selected has **Disallow** check out and a job code and job reason identified on the *Equipment Condition* frame. When a work order is created on an *Equipment Asset*, the **Equipment Condition** field displays. This field is updatable and validated. The **BIN No** location, if identified, displays and is updateable.

Work Order Main

Work Order Filter
Clear Filter

Work Order Search

Show Closed Work Order(s) Since 10/17/2022:

Unit/Department/Component or Work Order Number:

1987 FORD F700

Work Order List (Record 1 of 1)

Work Order	Location	Description	Status
159964	FTHLSM	NORTH FOOTHILLS COMPLEX MAINTENANCE	OPEN

[Start Work Order](#)

General
Job
Labor
Part
Comm
Fluid

Work Order Information

Unit: Unit Status: VIN:

WO Status: Location:

Visit Information

Reason:

Open:

Completed:

Meter Information

LTD Open Usage:

LTD Maint Cost:

ETD Maint Cost:

Contact Information

Name:

Phone:

Ext:

Cost Summary

Limit:

Labor: Hrs:

Material:

Equipment Information

Equipment Condition:

Bin No:

Section 5. System Flags

Bin Logic – System Flag 5137

Bin number logic for equipment is controlled by System Flag 5137. The system clears the bin code from the equipment record when it is checked out. This field is enterable and is valid only if the System Flag 5137, Require/Validate Bin Number on Unit Main? is set to **Y** or **N**. If System flag 5137 is set to **R** or **V**, the bin will not be removed during check out but would still be updated during check out and on the *Unit Main Equipment* record.

- **N** – Bin number is not required or validated; will allow the bin number to be free form up to 30 characters.
- **Y** - Bin number is not required but will be validated against a part bin and is limited to six characters if entered.
- **R** – Bin number is required but will not be validated.
- **V** – Bin number is required or validated.

Section 6. Reports

All M5 standard **Unit Reports** have been modified with filters for Equipment. The filters are *Asset Type*, *Equipment Type*, and *SKU*.

Section 7. Updates

The following updates apply to the *Equipment Focus Training Guide*.

Release	Section	Description
25.0	All sections	Applied miscellaneous writing style updates throughout the document.
24.3	Section 4. Process, Equipment Request Notifications	Added new EQUIPMENT REQUEST CREATED notification.
24.3	Section 4. Process, Equipment Check Out – Notifications	Added new EQUIPMENT CHECKED OUT notification.
23.2	Section 1. Overview	Removed the reference to a special billing item. <i>The existing M5 billing process has been modified to include a new billing item for equipment charges.</i>