



Equipment Focus

Training Guide

Version 24.x
Last Modified 24.0 | March 2024

© 2024 AssetWorks Inc., its subsidiaries and affiliates. All rights reserved.

Private and Confidential. Not for public dissemination

Information contained in this document is proprietary to AssetWorks Inc. and may be used or disclosed only with written permission from AssetWorks Inc. This guide, or any part thereof, may not be reproduced without the prior written permission of AssetWorks Inc. This document refers to numerous products by their trade names. In most, if not all, cases these designations are claimed as Trademarks or Registered Trademarks by their respective companies. This document and the related software described in this manual are supplied under license or nondisclosure agreement and may be used or copied only in accordance with the terms of the agreement. The information in this document is subject to change without notice and does not represent a commitment on the part of AssetWorks Inc. The names of companies and individuals used in the sample database and in examples in the manuals are fictitious and are intended to illustrate the use of the software. Any resemblance to actual companies or individuals, whether past or present, is purely coincidental.

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.

Equipment Focus - Training Guide

Version 24.x

Last Modified 24.0 | March 2024

Contents

Technical Support..... 1

Overview..... 3

Configuration..... 4

 Unit Asset Types 4

 Equipment Conditions..... 5

 Equipment Return Reasons 6

 Equipment Types/SKU..... 7

 Unit Main..... 8

Process..... 9

 Equipment Request..... 9

 Equipment Check Out..... 10

 Equipment Check In 12

 Equipment Check Query..... 13

 Standard Job MCC..... 14

 Work Order for Equipment..... 15

System Flags..... 16

 Bin Logic – System Flag 5137 16

Reports..... 16

Updates..... 17

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 may also 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.

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.

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"/>

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 following are 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

Equipment Conditions

The Equipment Condition codes 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 they are 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.

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"/>

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 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.

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"/>

To create a new Equipment Return Reason, 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. **Note:** Only one Default flag can be set. Select **SAVE** to update the record.

To disable an Equipment Return Reason, 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 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.

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 type="checkbox"/>	<input type="checkbox"/>

To create a new Equipment Type/SKU (stock keeping unit) enter the new **Equipment Type**, up to 30 characters, alphanumeric. 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 alphanumeric, and a Description, also 30 characters, alphanumeric. 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 (LOV). The **Description** and **SKU** assignments display. You can modify the description of the type or its SKUs, you may also disable a 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.

Unit Main

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

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

Using 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:

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 (LOV) 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.

Equipment Request

Equipment Request
Request #:

Request Employee No:

From Location:

To:

Equipment Requests (Loaded 0 records)

Equipment Type	SKU	Qty	Pick Up By	Est Check Out	Est Return	Status	Status Date	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.

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:




Retrieve

Clear

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	

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"/> 

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:
FM

Check In Employee:

Checked Out Location:
FM

Checked Out To:
▼

Responsible Party:

Check Out Date Range:
📅

Equipment Type/SKU:

Equipment No:

Retrieve

Clear

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
-------------------	----------------	-----	---------------	-----------	-----	---------------	----------------------	----------------	-----------------------	-------

Page 12 of 17

Equipment Focus - Training Guide
Version 24.x

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:
FM

Responsible Party:

Check Out Date From: To:

Check In Date From: To:

Check In Location:

Equipment No:

SKU:

Request ID:

Check Out/In Status:
All

Equipment Type:

Return Reason:

Employee Owned:
All

Retrieve

Clear

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
----------	----------------	-----	----------------	---------------	--------------------	-------------------	---------------	--------------	---------------	-------------	--------------------	-------------	------------	-------

Page 13 of 17

Equipment Focus - Training Guide
Version 24.x

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.

The screenshot shows the 'Standard Job MCC' form. At the top, there's a title 'Standard Job MCC'. Below it, a section 'Job / MCC' contains input fields for 'Job Code:' and 'MCC:'. A navigation bar below this has tabs: '+', 'Schedule', 'Forecaster' (which is active), 'Loc Override', 'Subjobs', and 'Test Suites'. The main content area is divided into three sections: 'Forecaster Information', 'MCC Season', and 'Job Defaults'. 'Forecaster Information' includes 'Scheduling Basis:' with a dropdown set to 'Absolute', 'Recurring Job:' with an unchecked checkbox, 'Seasonal Restriction:' with a dropdown set to 'None', 'Maintain Intervals In Cycle:' with an unchecked checkbox, and 'Push next occurrence to the end of month:' with an unchecked checkbox. 'MCC Season' includes 'Starting:' and 'Ending:' each with 'Month' and 'Day' input fields. 'Job Defaults' includes 'Location Code:' and 'Visit Reason:' input fields, 'Priority:' and 'Overdue Priority:' dropdowns both set to '0 - Lowest', 'Calibration:' with an unchecked checkbox, and 'Prevent Job Reason Changes:' with an unchecked checkbox.

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.

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 an 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:

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:

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, then 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/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 6 characters if entered.
- **R** – Bin Number is required but will not be validated.
- **V** – Bin Number is required/validated.

Reports

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

Updates

Release	Section	Description
23.2	Overview	On page 1 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>