2010

Generating Reports in Fleet Focus M5

This document illustrates how a user can design, filter, format, and obtain reports in a variety of file formats in Fleet Focus M5.

John Ochia
State of Minnesota
3/22/2010

Table of Contents

Log into M5. ..... *3*
Search for and select the report *4*
Format & sort the report *6*
Filter the report *7*
Save the report *8*
Schedule the report *9*
Complete the schedule criteria & submit the report *10*
View report confirmation *11*
Close the report confirmation page *12*
Access your M5 In-Bin *13*
View inside the Report Bin (In Bin) *14*
Click on link to the report *15*
View the report (print preview window) *16*
Print the report *17*
Save the report *17*
Close the report print preview window *17*
How to find a previously saved report *18*
How to delete a saved report *22*
How to find the status of a report *25*

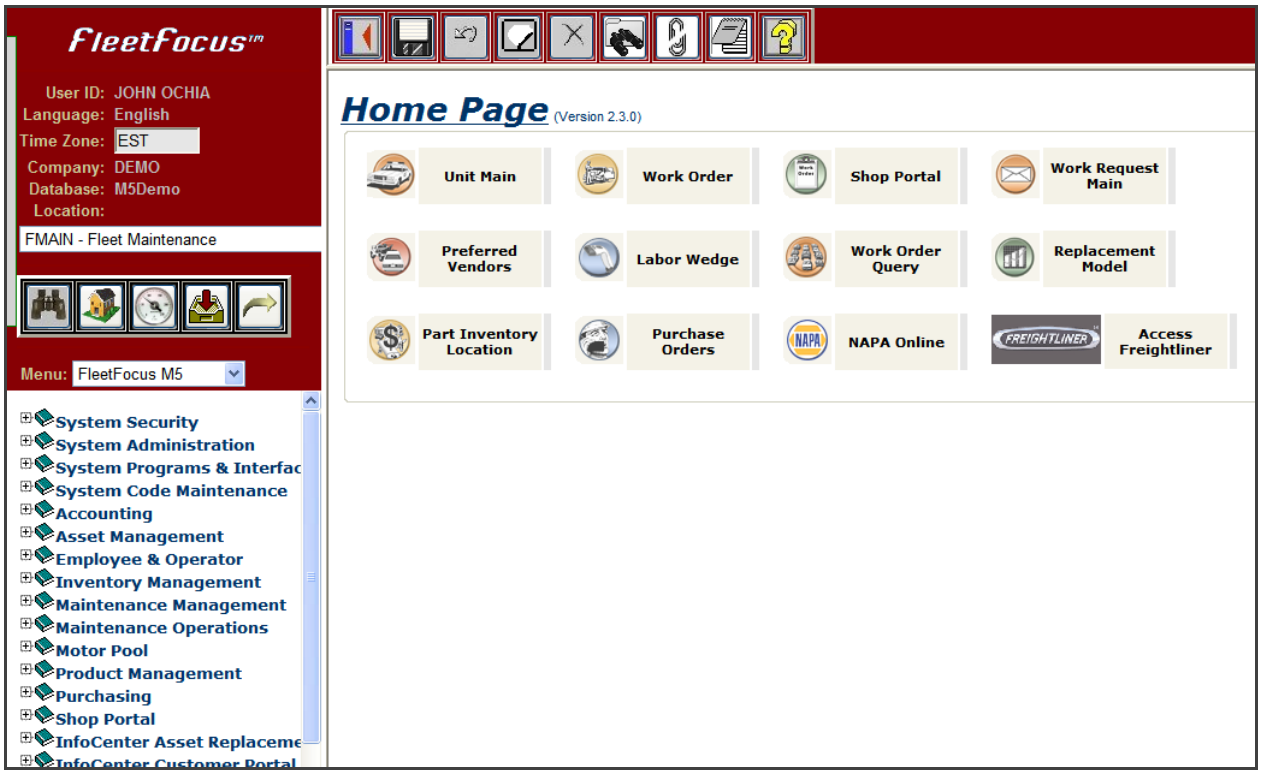
Admin Minnesota FLEET AND SURPLUS SERVICES	**Division of Administration** Fleet and Surplus Services	
	M5 Implementation Standard Work **HOW TO RUN REPORTS IN M5**	
Owner	**Approved By**	**Revision Date**

PURPOSE	To enable users generate reports from their workstations
SCOPE	The document addresses only steps within Fleet Focus M5. Fleet Focus M5 interaction with external systems are out of scope
DEFINITIONS	
EXPECTED OUTCOMES	Users are able to generate reports without help from AssetWorks or OET Support
LINK to DOCUMENTATION	H:\SHAREDOC\M5 procedures\Current approved procedures\TRAINING

PROCEDURE

Log into M5.

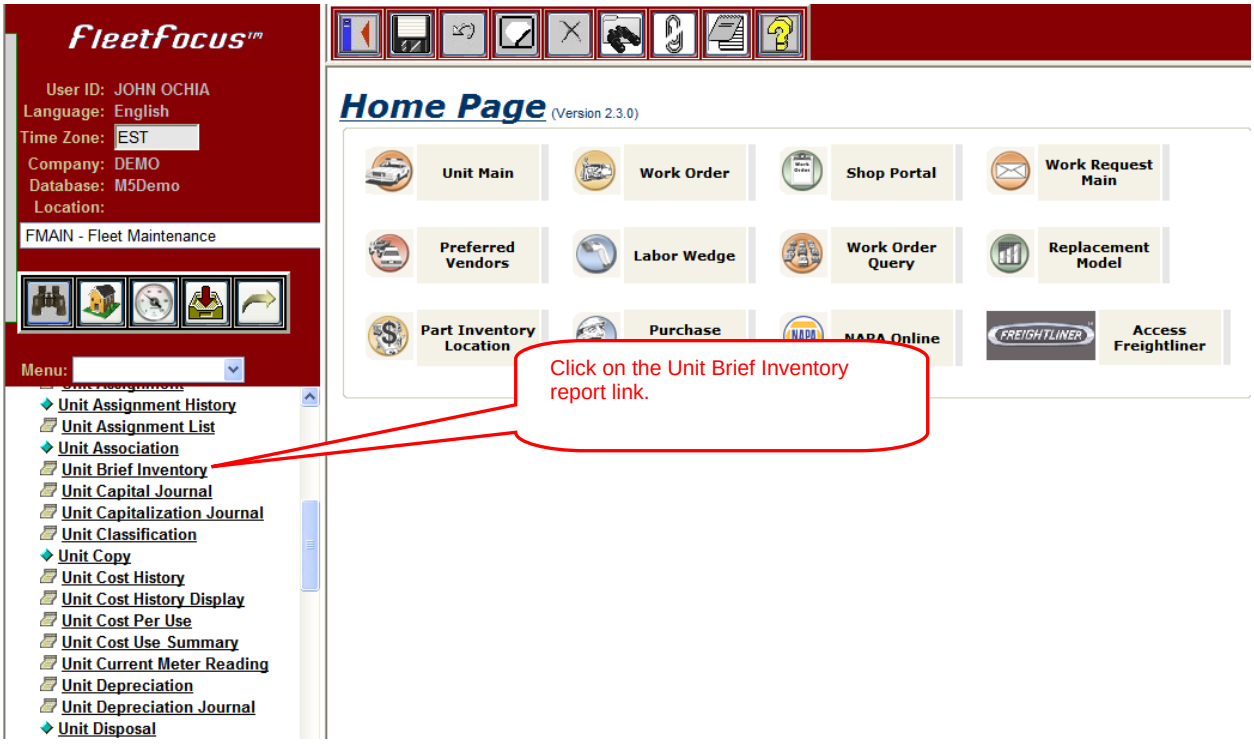
1. Log into M5 using your assigned username and password.
2. Navigate to the M5 Home Page.



PROCEDURE

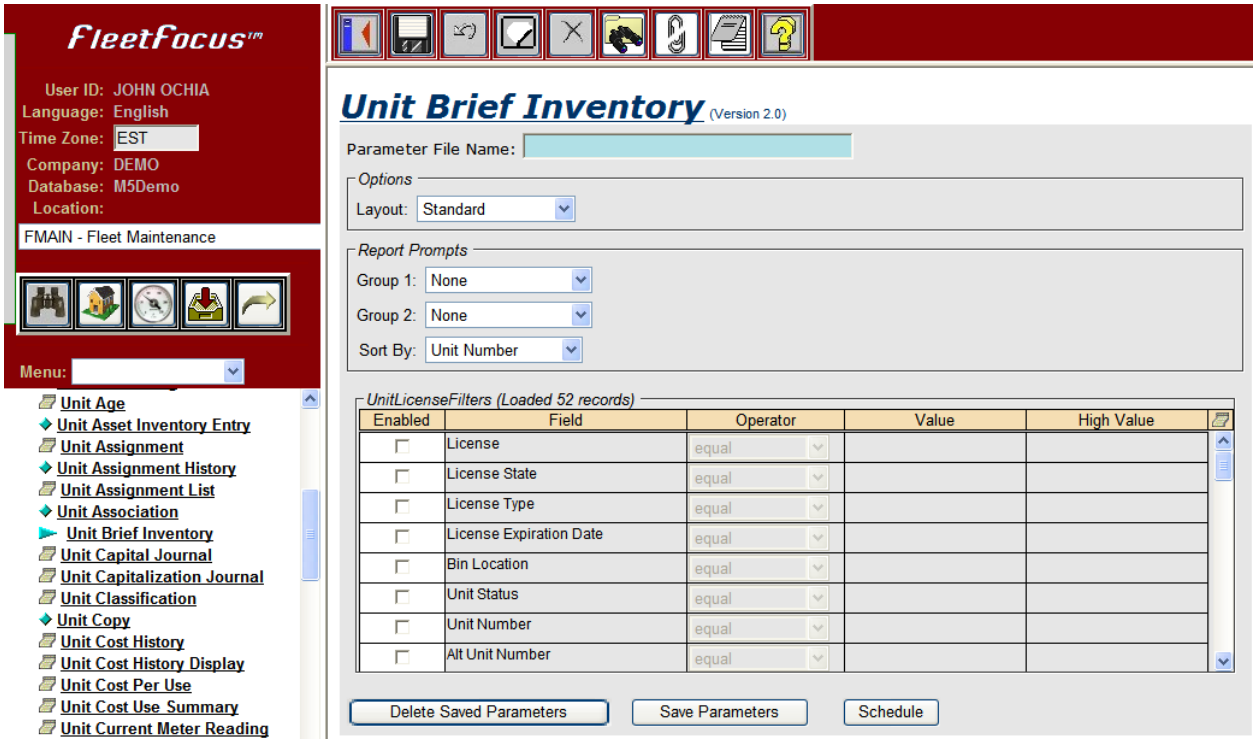
Search for and select the report

1. Navigate to the report through the menus or through the menu search.
2. Click on the report link (example, Unit Brief Inventory).



PROCEDURE

3. The Unit Brief Inventory report screen should display.



PROCEDURE

Format & sort the report

Level 1 Grouping:

- Selecting an item from the Level 1 Grouping selection box will group report information by the item selected. If the item selected is “Manufacturer”, then report information will be grouped by manufacturer.
- Selecting “None” will not implement any grouping option from the Level 1 Grouping selection box.
- When selected, Level 1 Grouping also inserts page breaks in the report.

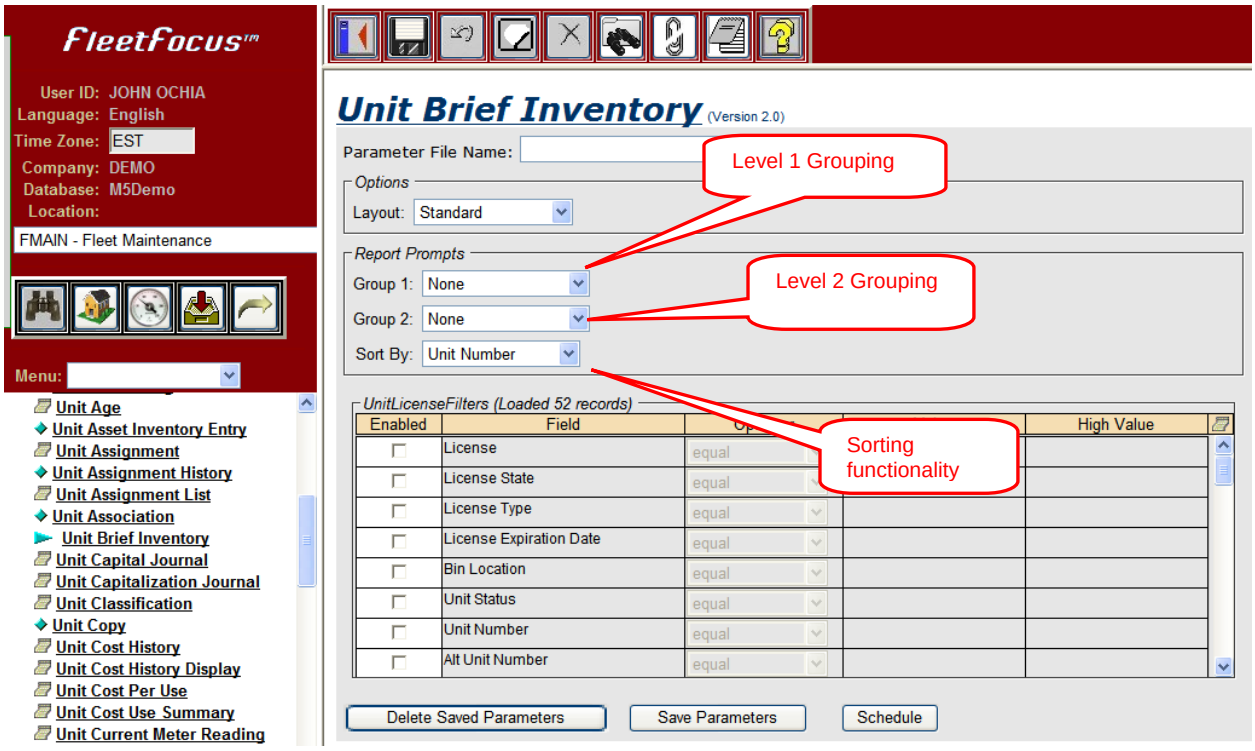
Level 2 Grouping:

- Selecting an item from the Level 2 Grouping selection box will group report information by the item selected. If the item selected is “Year”, then report information will be grouped by year.
- Selecting “None” will not implement any grouping option from the Level 2 Grouping selection box.
- When selected, Level 2 Grouping also generates a subtotal at the end of a section.

Sorting:

- Sorting will display individual records in ascending order. The sorting feature does not create any breaks or subtotals.

1. Select “None” in the Level 1 Grouping dropdown selection box.
2. Select “None” in the Level 2 Grouping dropdown selection box.
3. Select “Unit Number” in the Sort By dropdown selection box.



PROCEDURE

Filter the report

Report filters enable a user to select which **records** will be included in a report. If a report is generated without filters, all records will be included in the report.

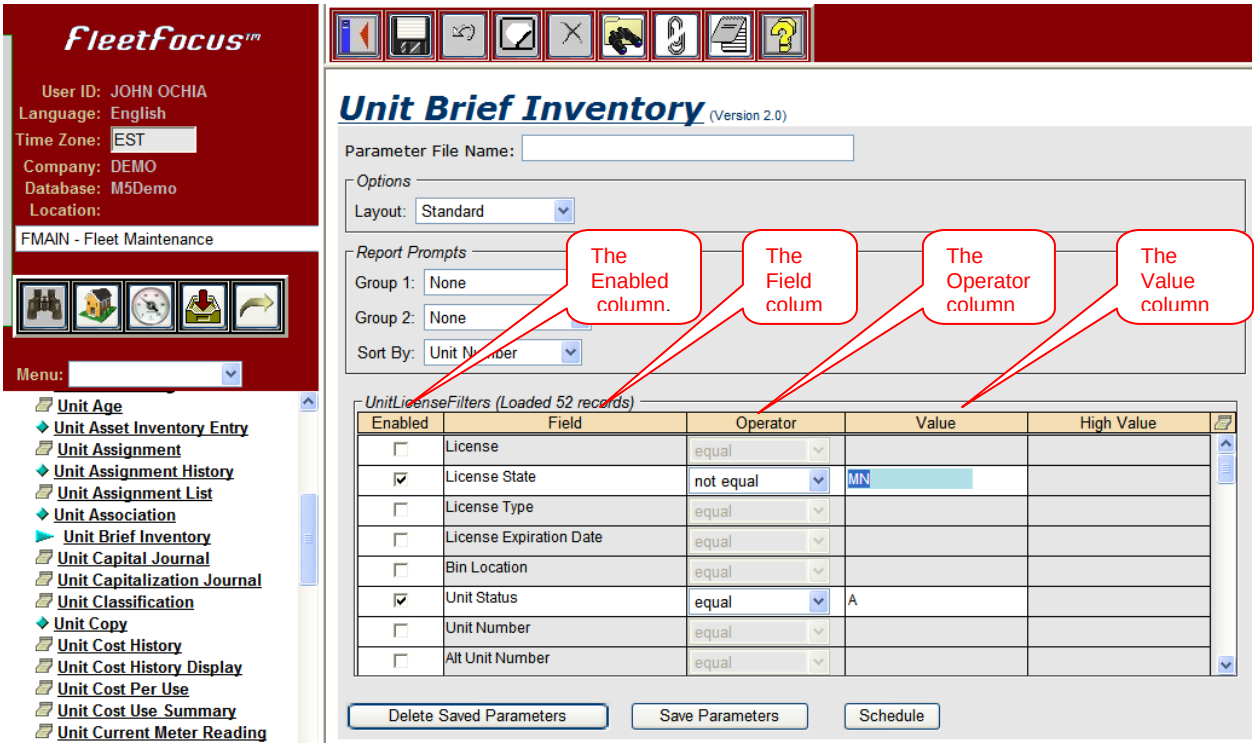
Report filters **DO NOT** determine fields that will be displayed on each line of a report.

1. Look under the Field column and identify a field you want in the report (example, “License State”).
2. Look under the Enabled column and click inside the checkbox adjacent to the “License State” field.
3. Look under the Operator column and click inside the corresponding dropdown box and select “not equal”.
4. Look under the Value column and double-click inside the corresponding field to launch LOV functionality. Double-click “MN” from the displayed list of values (LOV).
5. Look under the Field column and identify a field you want in the report (example, “Unit Status”).
6. Look under the Enabled column and click inside the checkbox adjacent to “Unit Status”.
7. Look under the Operator column and click inside the corresponding dropdown box and select “equal”.
8. Look under the Value column and double-click inside the corresponding field to launch LOV functionality. Double-click “A” from the displayed list of values (LOV).

What do all these selections mean?

We have requested a report for all units meeting the following criteria:

- Unit License State is not “MN” (see image below)
- Unit Status is Active (“A”) (see image below)

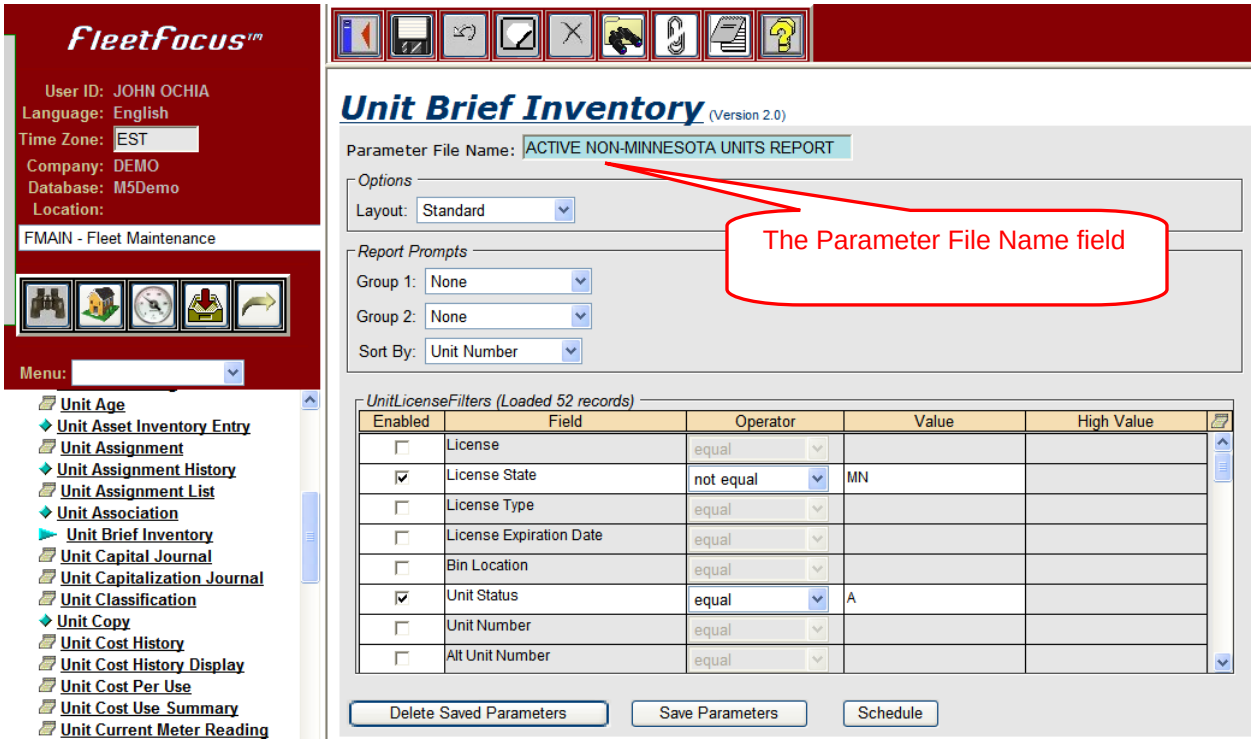


PROCEDURE

Save the report

After selecting the kind of information needed in a report, a user can save the report. Saving a report enables the user to run the report at any time. To save the report, do the following:

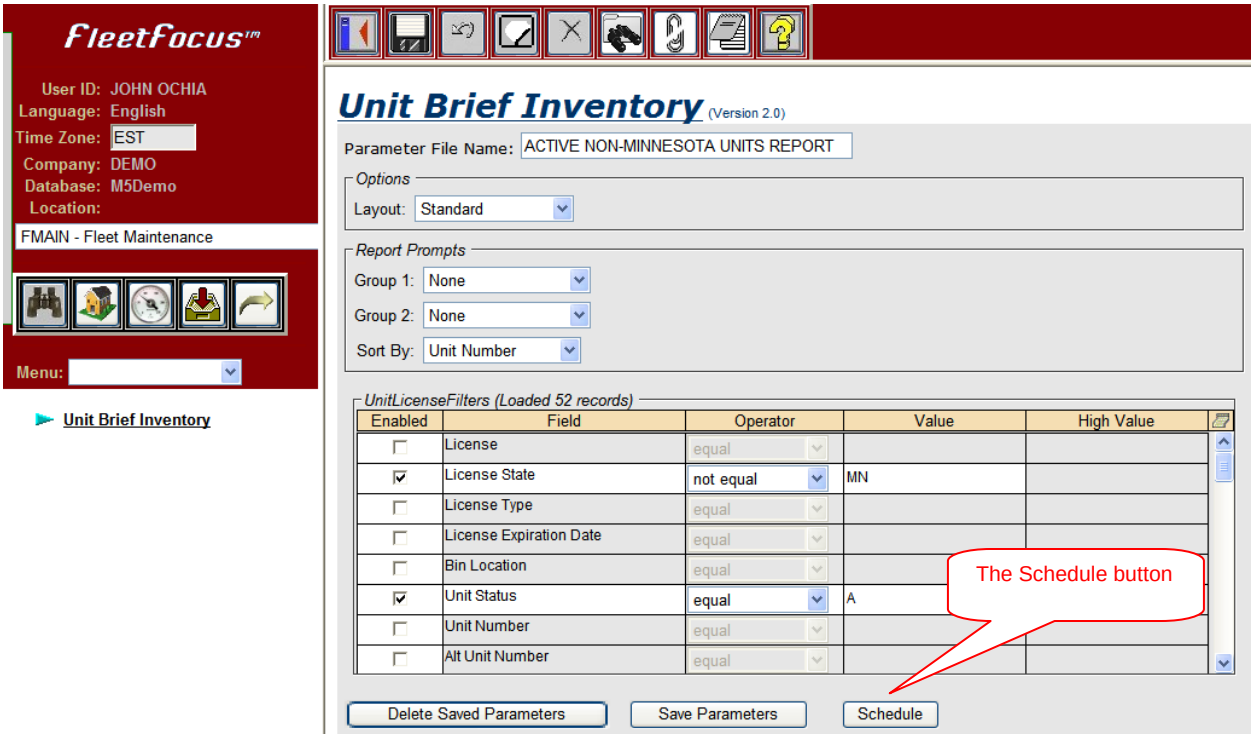
1. Locate the Parameter File Name textbox.
2. Type in a name for the report (example, ACTIVE NON-MINNESOTA UNITS REPORT).
3. Click on the Save Changes icon.



PROCEDURE

Schedule the report

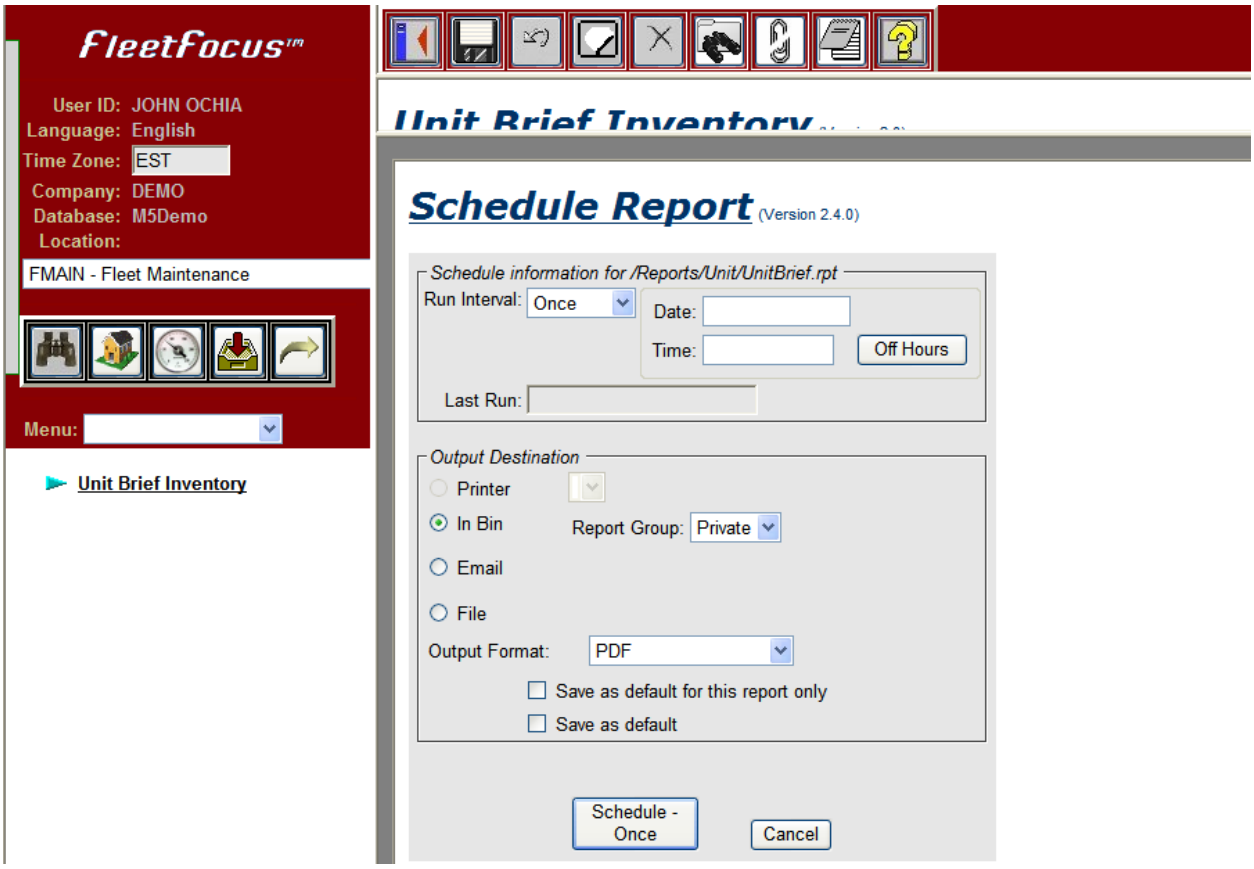
1. Click on the Schedule button.



PROCEDURE

Complete the schedule criteria & submit the report

1. The scheduling criteria information screen should display.
2. Verify the value in the Run Interval dropdown box is “Once”.
3. Under the Output Destination section, click inside the In Bin radio button.
4. Under the Output Format section, select a file format (example, PDF).
5. Click on the Schedule Once button to submit the report.



PROCEDURE

View report confirmation

1. The report confirmation page should display, and it should render:

   - The job number
   - When the report is scheduled to execute
   - Where the report output will be delivered to (example, M5 In Bin)

PROCEDURE

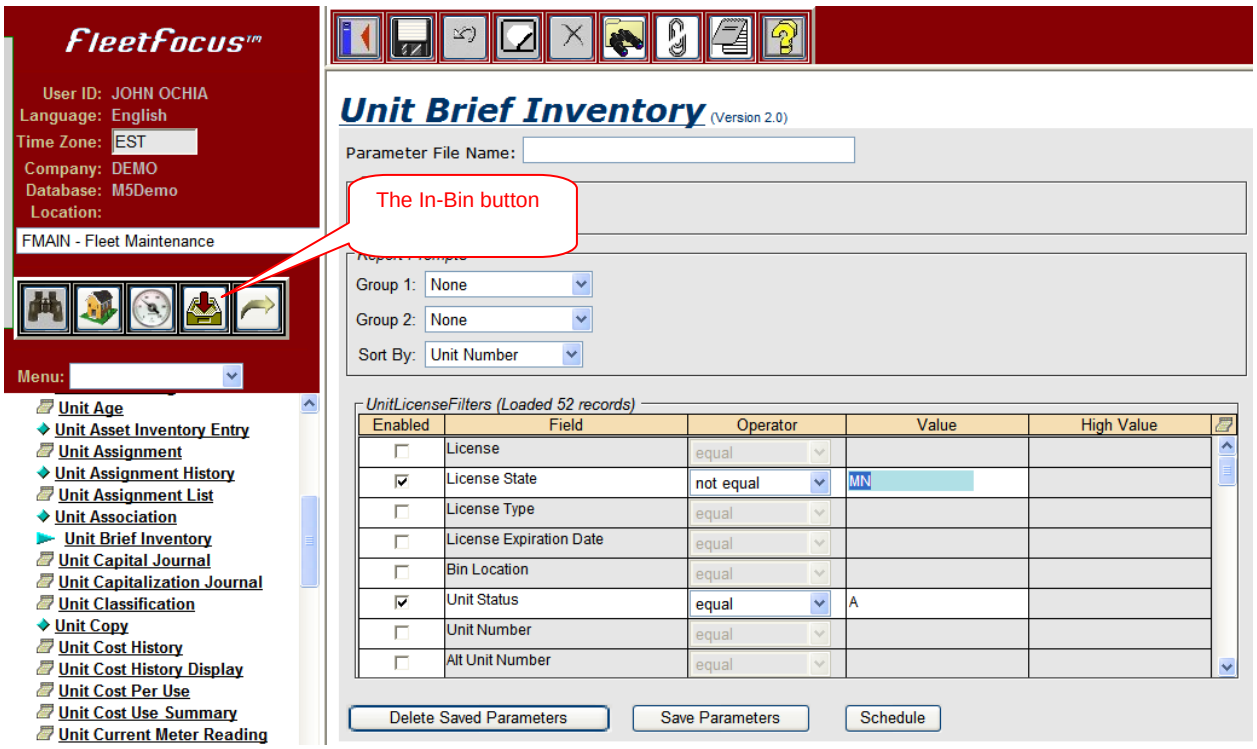
Close the report confirmation page

1. Click on the Close button.

PROCEDURE

Access your M5 In-Bin

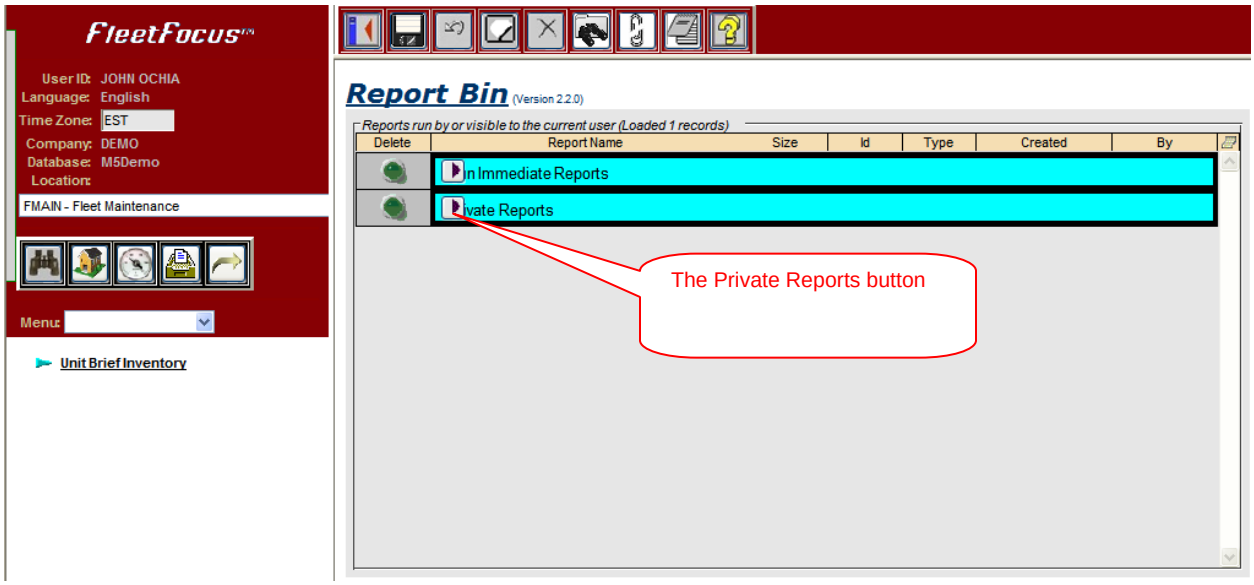
1. The report page should display again (Unit Brief Inventory).
2. Click on the In Bin button.



PROCEDURE

View inside the Report Bin (In Bin)

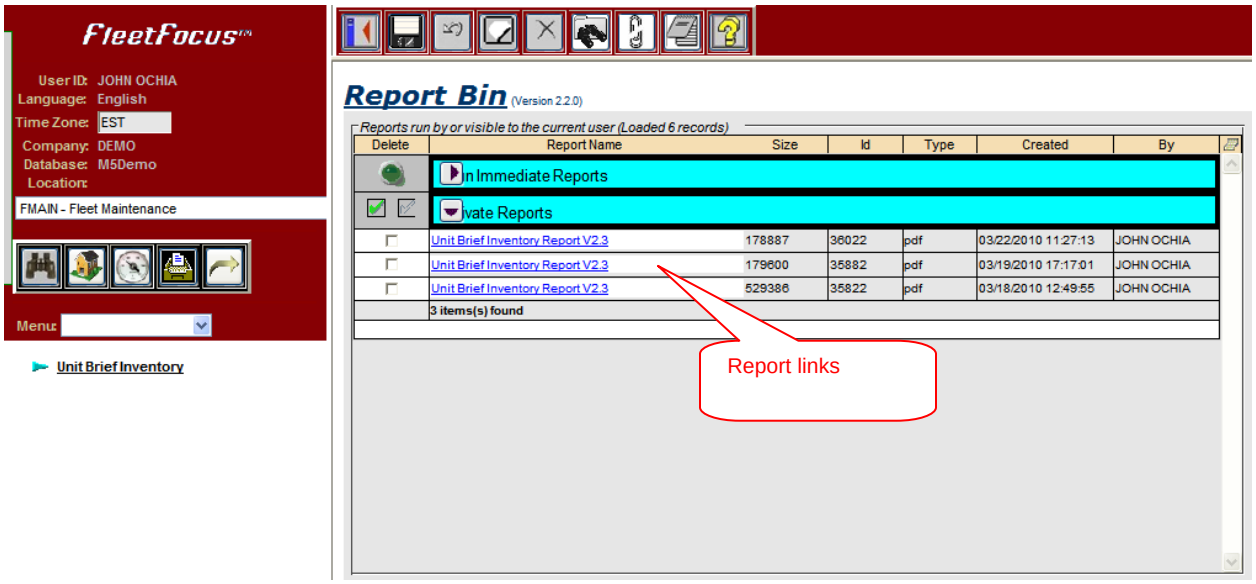
1. The Report Bin screen should display.
2. Click on the Private Reports button.



PROCEDURE

Click on link to the report

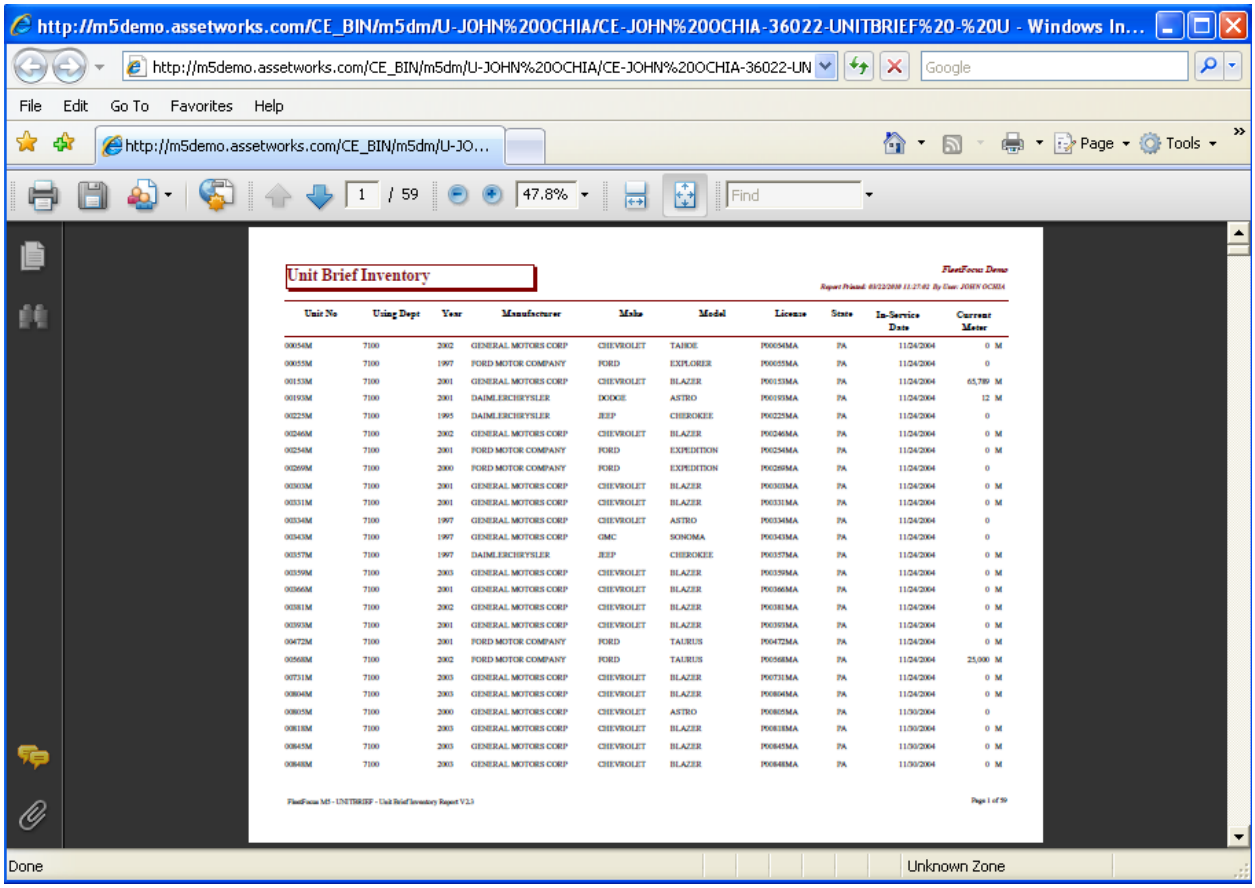
1. Click on the report link to display the report.



PROCEDURE

View the report (print preview window)

1. The report should display in the requested file format (PDF).



PROCEDURE

Print the report

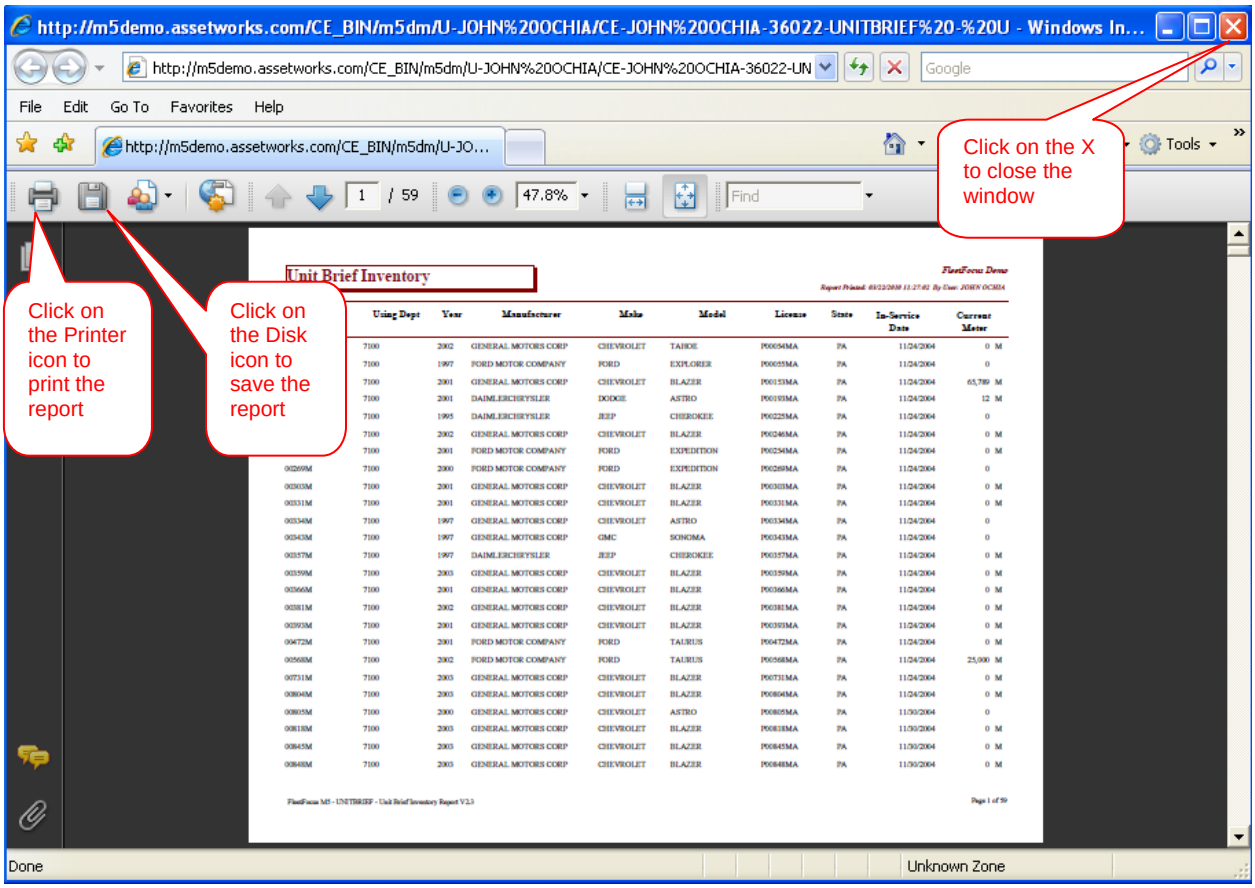
To print the report, click on the Printer icon on the tool bar. The system shows the default printer for the PC. The print job can be directed to other printers available for the PC by selecting those choices.

Save the report

To **save** the report, click on the **Disk** icon on the tool bar and specify the name and file location where the report is to be saved.

Close the report print preview window

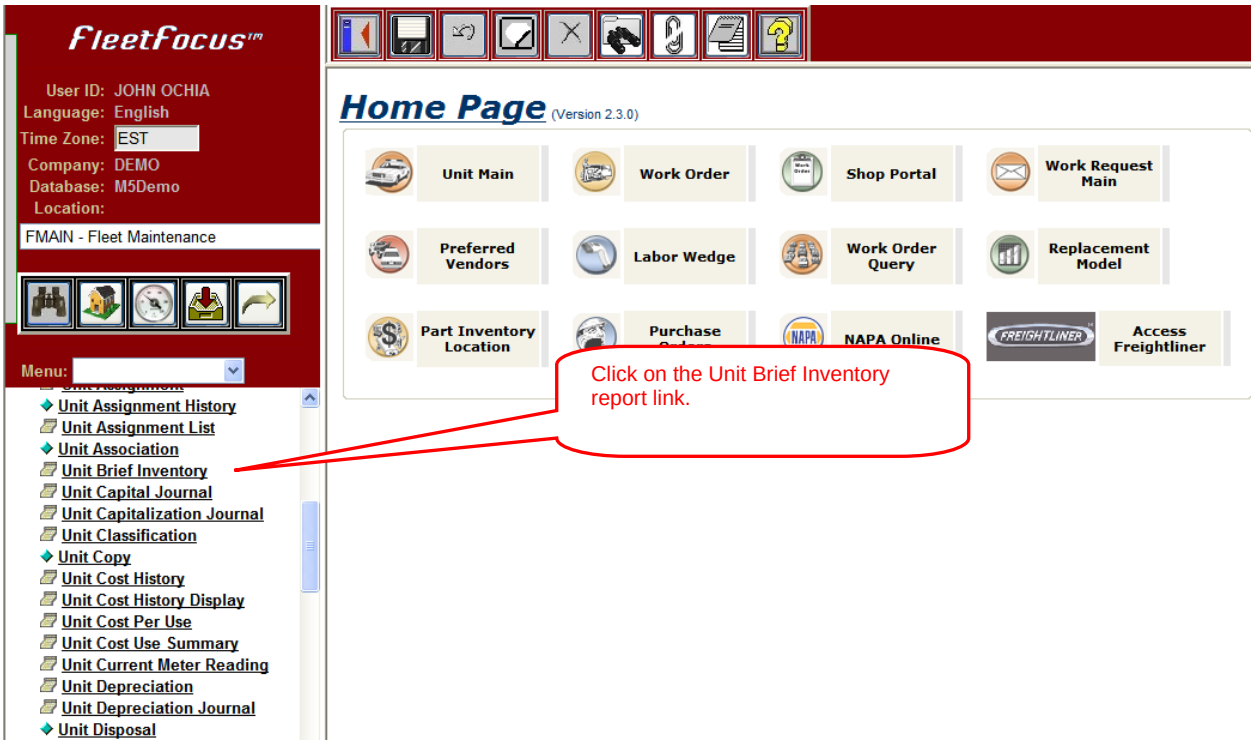
To close the report print preview window, click on the X on the right hand corner of the window.



PROCEDURE

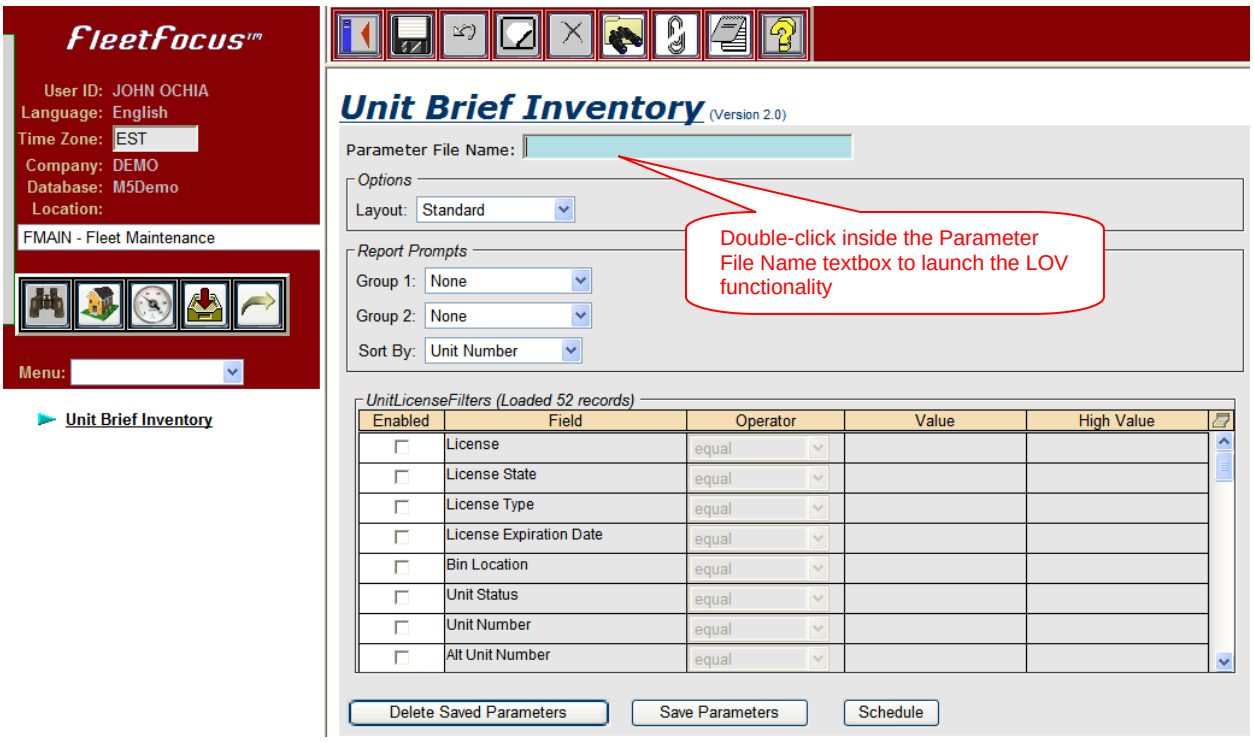
How to find a previously saved report

1. Navigate to the M5 Home Page.
2. Navigate to the report through the menus or through the menu search.
3. Click on the report link (example, Unit Brief Inventory).



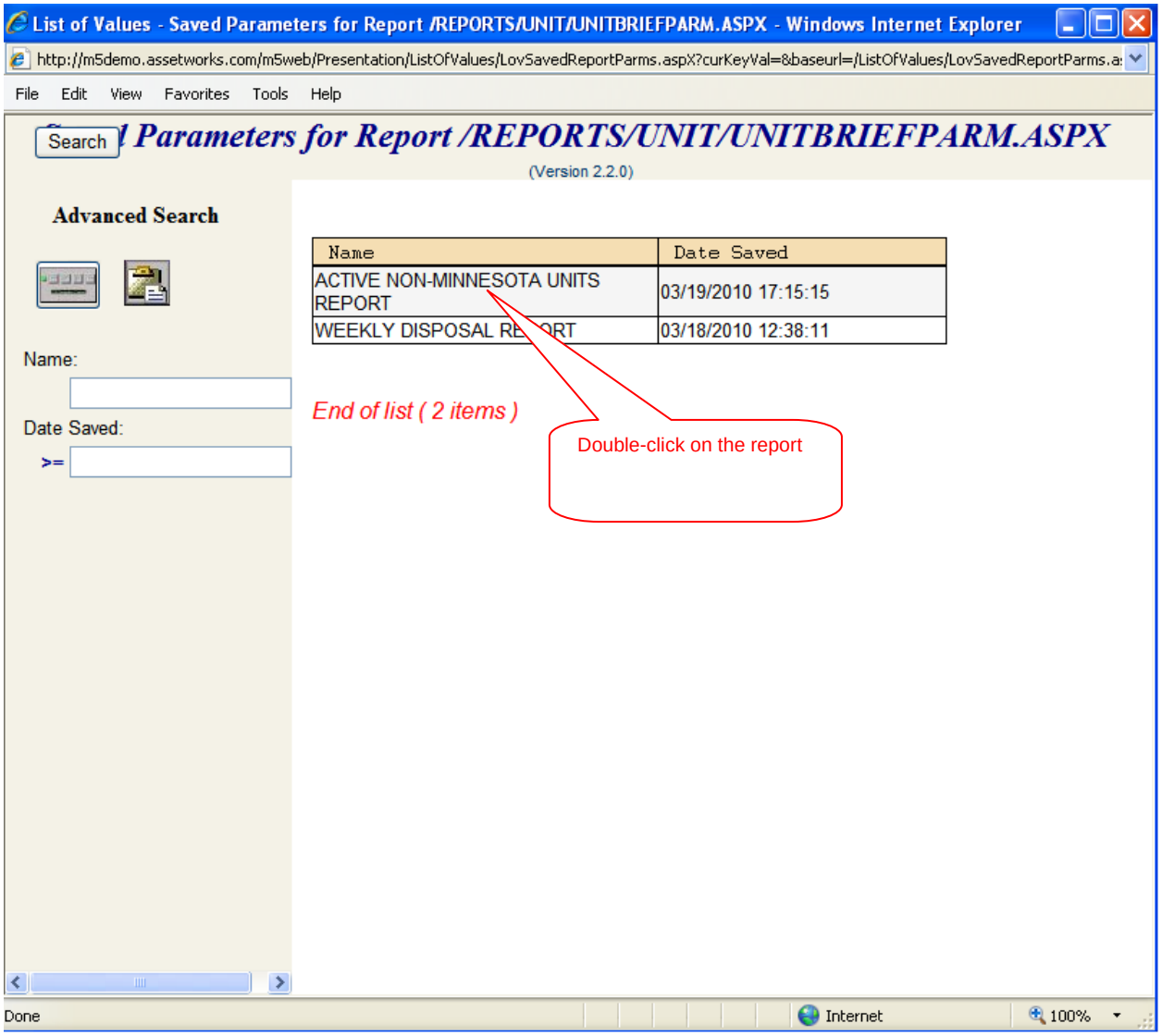
PROCEDURE

4. The Unit Brief Inventory report page should display.
5. Double-click inside the Parameter File Name textbox to launch the LOV functionality.



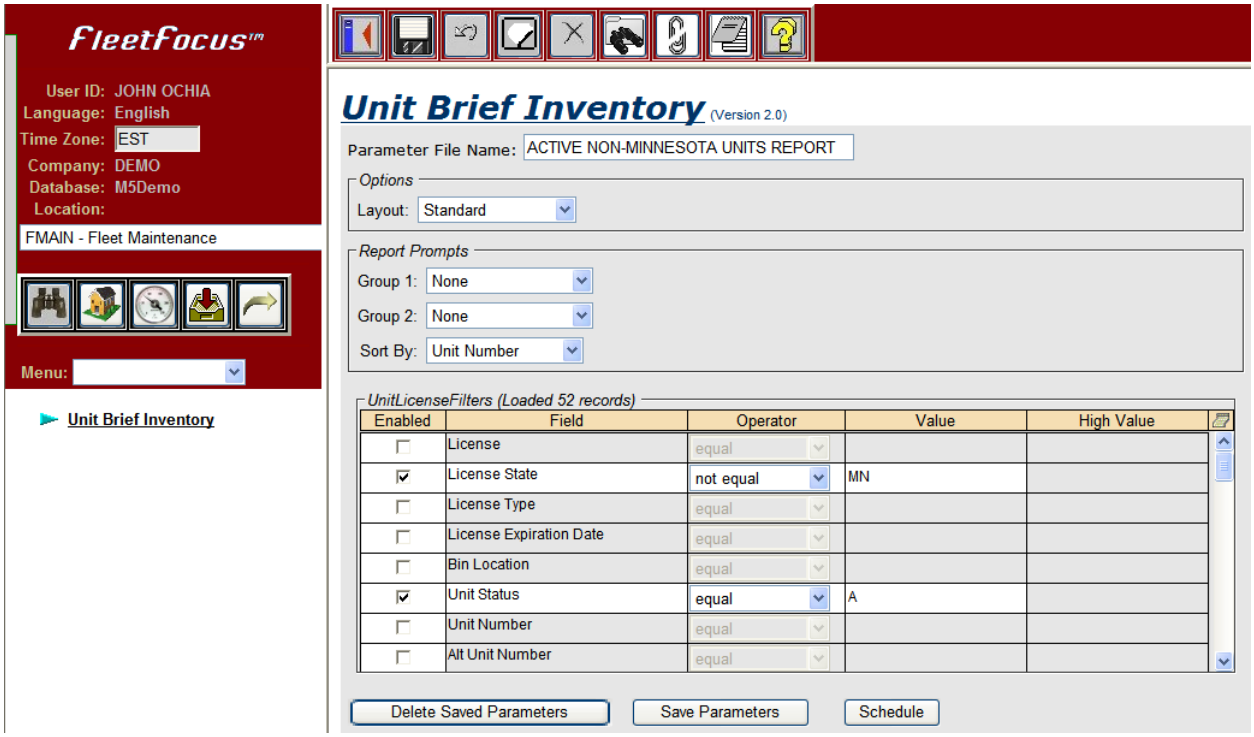
PROCEDURE

6. The reports list page should display.
7. Double-click on the report you want.



PROCEDURE

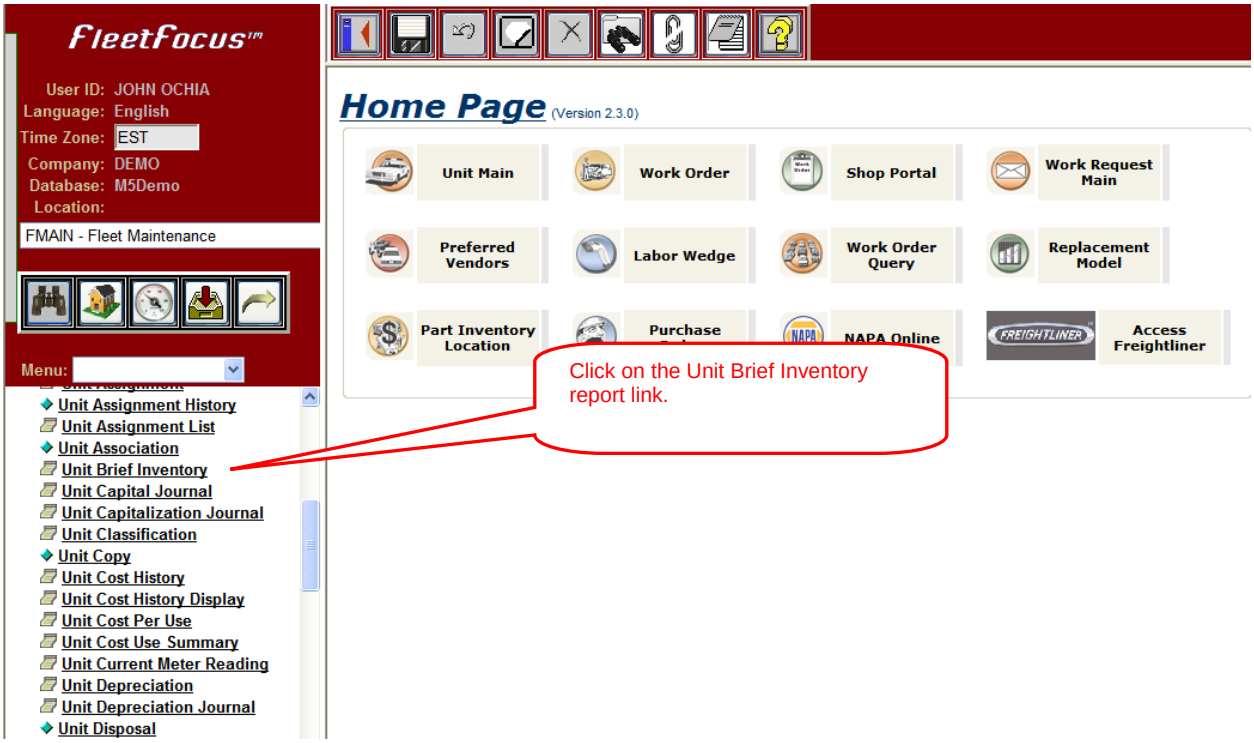
8. The report page should display.



PROCEDURE

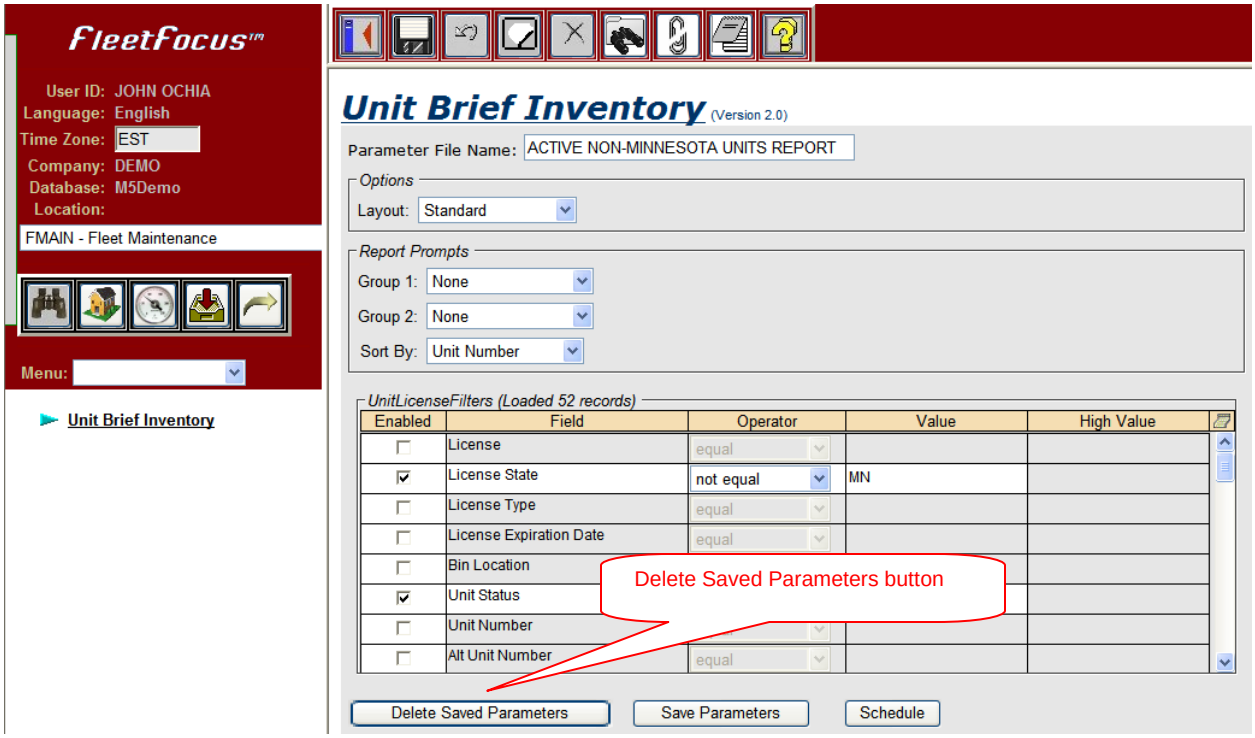
How to delete a saved report

1. Navigate to the M5 Home Page.
2. Navigate to the report through the menus or through the menu search.
3. Click on the report link (example, Unit Brief Inventory).



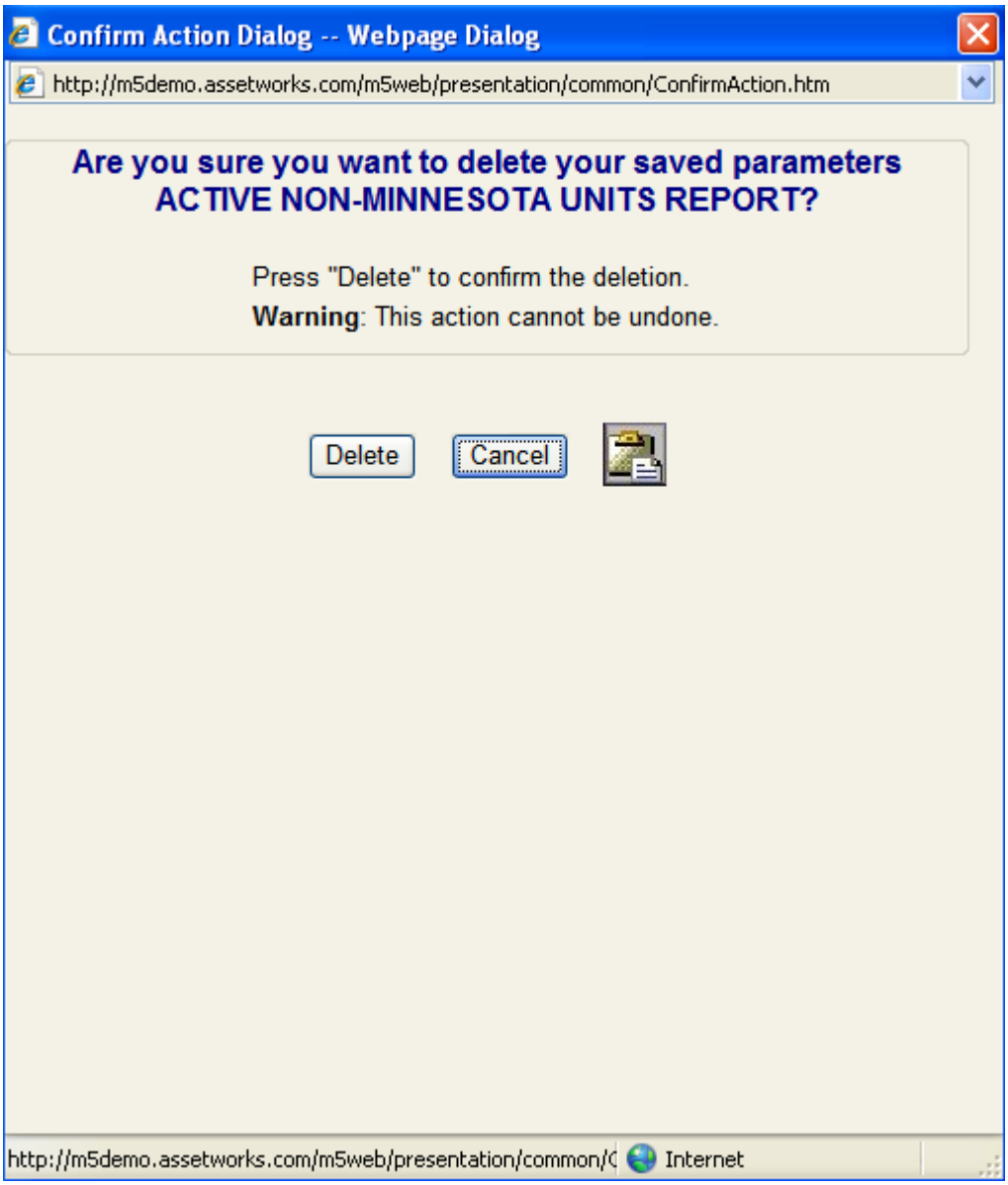
PROCEDURE

4. The report page should display.
5. Click on the Delete Saved Parameters button.



PROCEDURE

6. The Confirm Action Dialog page should display.
7. Click on the Delete button to delete the report.

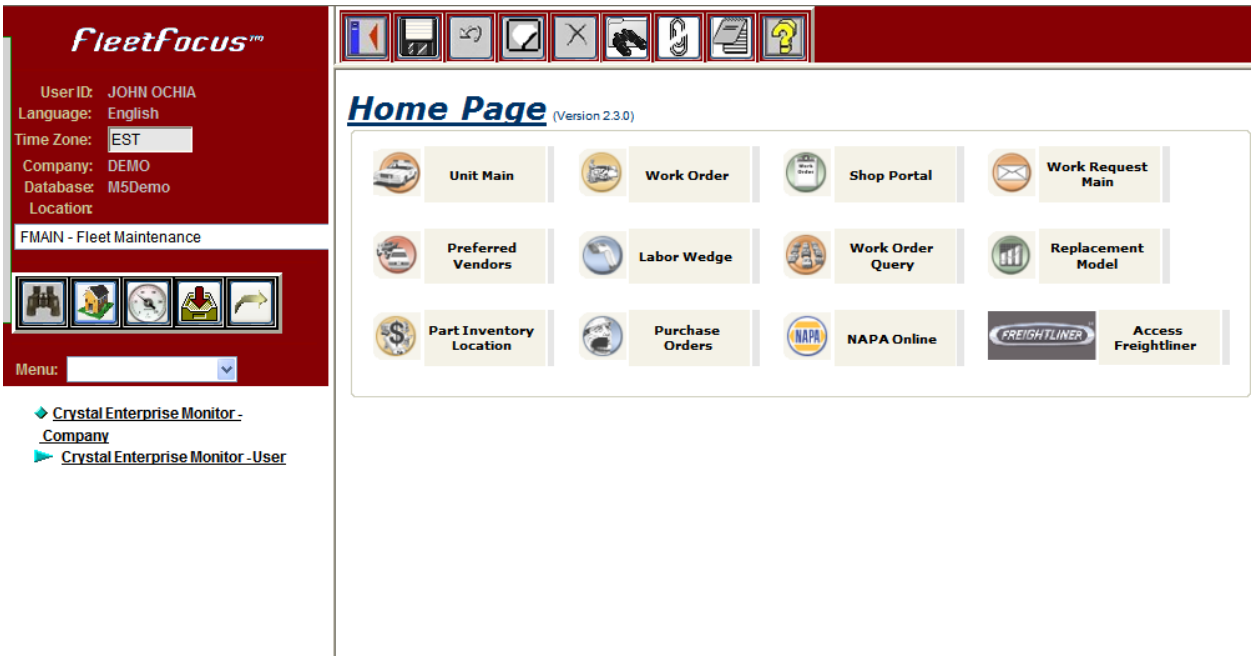


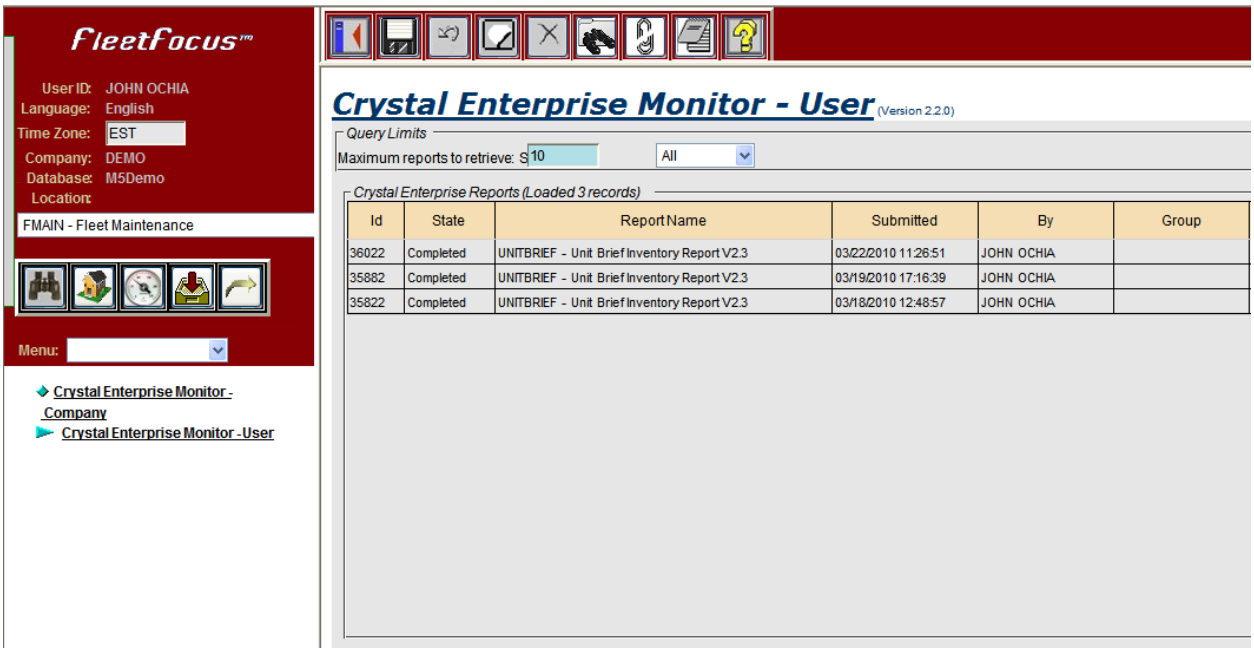
PROCEDURE

How to find the status of a report

Sometimes after submitting a report, the report output may be delayed, or the report may fail to execute. If your M5 In Bin is empty or does not contain your report output, find out the status of the report by doing the following:

1. Navigate to the M5 Home Page through the menus or through the menu search.
2. Search for the Crystal Enterprise Monitor – User screen.
3. Click on the Crystal Enterprise Monitor – User link.
   Note: Alternatively, you can click on the Crystal Enterprise Monitor – Company link.



PROCEDURE

4. The Crystal Enterprise Monitor – User screen should display.
5. The status of your report should display under the State field.