

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.

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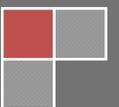


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Division of Administration
Fleet and Surplus Services

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:\SHARED\OC\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).

The screenshot displays the Fleetfocus™ Home Page (Version 2.3.0). The top navigation bar includes icons for Home, Print, Refresh, Stop, Close, Help, and Search. The left sidebar shows user information: User ID: JOHN OCHIA, Language: English, Time Zone: EST, Company: DEMO, Database: M5Demo, Location: FMAIN - Fleet Maintenance. Below this is a menu search box and a list of reports. A red callout bubble points to the 'Unit Brief Inventory' link in the menu.

Home Page (Version 2.3.0)

Unit Main | Work Order | Shop Portal | Work Request Main

Preferred Vendors | Labor Wedge | Work Order Query | Replacement Model

Part Inventory Location | Purchase | NAPA Online | Access Freightliner

Menu:

- Unit Assignment History
- Unit Assignment List
- Unit Association
- Unit Brief Inventory**
- Unit Capital Journal
- Unit Capitalization Journal
- Unit Classification
- Unit Copy
- Unit Cost History
- Unit Cost History Display
- Unit Cost Per Use
- Unit Cost Use Summary
- Unit Current Meter Reading
- Unit Depreciation
- Unit Depreciation Journal
- Unit Disposal

Click on the Unit Brief Inventory report link.

PROCEDURE

3. The Unit Brief Inventory report screen should display.

FleetFocus™

User ID: JOHN OCHIA
Language: English
Time Zone: EST
Company: DEMO
Database: M5Demo
Location: FMAIN - Fleet Maintenance

Menu:

- Unit Age
- Unit Asset Inventory Entry
- Unit Assignment
- Unit Assignment History
- Unit Assignment List
- Unit Association
- Unit Brief Inventory**
- Unit Capital Journal
- Unit Capitalization Journal
- Unit Classification
- Unit Copy
- Unit Cost History
- Unit Cost History Display
- Unit Cost Per Use
- Unit Cost Use Summary
- Unit Current Meter Reading

Unit Brief Inventory (Version 2.0)

Parameter File Name: _____

Options

Layout: Standard

Report Prompts

Group 1: None

Group 2: None

Sort By: Unit Number

UnitLicenseFilters (Loaded 52 records)

| Enabled | Field | Operator | Value | High Value |
|--------------------------|-------------------------|----------|-------|------------|
| <input type="checkbox"/> | License | equal | | |
| <input type="checkbox"/> | License State | equal | | |
| <input type="checkbox"/> | License Type | equal | | |
| <input type="checkbox"/> | License Expiration Date | equal | | |
| <input type="checkbox"/> | Bin Location | equal | | |
| <input type="checkbox"/> | Unit Status | equal | | |
| <input type="checkbox"/> | Unit Number | equal | | |
| <input type="checkbox"/> | Alt Unit Number | equal | | |

Delete Saved Parameters Save Parameters Schedule

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.

The screenshot displays the 'Unit Brief Inventory' (Version 2.0) configuration screen in the FleetFocus application. The interface is divided into several sections:

- Header:** 'FleetFocus™' logo and user information (User ID: JOHN OCHIA, Language: English, Time Zone: EST, Company: DEMO, Database: M5Demo, Location: FMAIN - Fleet Maintenance).
- Navigation:** A sidebar menu on the left lists various report options, with 'Unit Brief Inventory' currently selected.
- Configuration Area:** A central panel titled 'Unit Brief Inventory' contains several settings:
 - Parameter File Name:** An empty text input field.
 - Options:** A dropdown menu set to 'Standard'.
 - Report Prompts:** Two dropdown menus for 'Group 1' and 'Group 2', both set to 'None'. Red callouts point to these as 'Level 1 Grouping' and 'Level 2 Grouping' respectively.
 - Sort By:** A dropdown menu set to 'Unit Number'. A red callout points to this as 'Sorting functionality'.
- Table:** A table titled 'UnitLicenseFilters (Loaded 52 records)' with columns for 'Enabled', 'Field', 'Operator', and 'High Value'. The table lists various filter criteria such as License, License State, License Type, License Expiration Date, Bin Location, Unit Status, Unit Number, and Alt Unit Number.
- Buttons:** 'Delete Saved Parameters', 'Save Parameters', and 'Schedule' buttons are located at the bottom of the configuration area.

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)

FleetFocus™

User ID: JOHN OCHIA
Language: English
Time Zone: EST
Company: DEMO
Database: M5Demo
Location:
FMAIN - Fleet Maintenance

Menu:

- Unit Age
- Unit Asset Inventory Entry
- Unit Assignment
- Unit Assignment History
- Unit Assignment List
- Unit Association
- Unit Brief Inventory
- Unit Capital Journal
- Unit Capitalization Journal
- Unit Classification
- Unit Copy
- Unit Cost History
- Unit Cost History Display
- Unit Cost Per Use
- Unit Cost Use Summary
- Unit Current Meter Reading

Unit Brief Inventory (Version 2.0)

Parameter File Name: _____

Options
Layout: Standard

Report Prompts
Group 1: None
Group 2: None
Sort By: Unit Number

UnitLicenseFilters (Loaded 52 records)

| Enabled | Field | Operator | Value | High Value |
|-------------------------------------|-------------------------|-----------|-------|------------|
| <input type="checkbox"/> | License | equal | | |
| <input checked="" type="checkbox"/> | License State | not equal | MN | |
| <input type="checkbox"/> | License Type | equal | | |
| <input type="checkbox"/> | License Expiration Date | equal | | |
| <input type="checkbox"/> | Bin Location | equal | | |
| <input checked="" type="checkbox"/> | Unit Status | equal | A | |
| <input type="checkbox"/> | Unit Number | equal | | |
| <input type="checkbox"/> | Alt Unit Number | equal | | |

Delete Saved Parameters Save Parameters Schedule

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.

The screenshot shows the FleetFocus software interface. On the left is a navigation menu with various report options. The main window displays the 'Unit Brief Inventory' (Version 2.0) configuration screen. At the top, the 'Parameter File Name' field is set to 'ACTIVE NON-MINNESOTA UNITS REPORT'. Below this are sections for 'Options' (Layout: Standard), 'Report Prompts' (Group 1: None, Group 2: None, Sort By: Unit Number), and a table of 'UnitLicenseFilters'. A red callout box highlights the 'Parameter File Name' field.

Parameter File Name: ACTIVE NON-MINNESOTA UNITS REPORT

Options

Layout: Standard

Report Prompts

Group 1: None

Group 2: None

Sort By: Unit Number

UnitLicenseFilters (Loaded 52 records)

| Enabled | Field | Operator | Value | High Value |
|-------------------------------------|-------------------------|-----------|-------|------------|
| <input type="checkbox"/> | License | equal | | |
| <input checked="" type="checkbox"/> | License State | not equal | MN | |
| <input type="checkbox"/> | License Type | equal | | |
| <input type="checkbox"/> | License Expiration Date | equal | | |
| <input type="checkbox"/> | Bin Location | equal | | |
| <input checked="" type="checkbox"/> | Unit Status | equal | A | |
| <input type="checkbox"/> | Unit Number | equal | | |
| <input type="checkbox"/> | Alt Unit Number | equal | | |

Buttons: Delete Saved Parameters, Save Parameters, Schedule

PROCEDURE

Schedule the report

1. Click on the Schedule button.

The screenshot shows the Fleetfocus software interface. On the left is a navigation menu with the 'Unit Brief Inventory' option selected. The main window displays the 'Unit Brief Inventory' report configuration page. At the top, the 'Parameter File Name' is set to 'ACTIVE NON-MINNESOTA UNITS REPORT'. Below this are sections for 'Options' (Layout: Standard), 'Report Prompts' (Group 1: None, Group 2: None, Sort By: Unit Number), and a table of 'UnitLicenseFilters'. The table has columns for 'Enabled', 'Field', 'Operator', 'Value', and 'High Value'. The 'Unit Status' filter is checked and set to 'equal' with a value of 'A'. A red callout bubble points to the 'Schedule' button at the bottom right of the configuration area.

| Enabled | Field | Operator | Value | High Value |
|-------------------------------------|-------------------------|-----------|-------|------------|
| <input type="checkbox"/> | License | equal | | |
| <input checked="" type="checkbox"/> | License State | not equal | MN | |
| <input type="checkbox"/> | License Type | equal | | |
| <input type="checkbox"/> | License Expiration Date | equal | | |
| <input type="checkbox"/> | Bin Location | equal | | |
| <input checked="" type="checkbox"/> | Unit Status | equal | A | |
| <input type="checkbox"/> | Unit Number | equal | | |
| <input type="checkbox"/> | Alt Unit Number | equal | | |

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.

The screenshot displays the Fleetfocus™ software interface. On the left is a navigation sidebar with the user ID 'JOHN OCHIA', language 'English', time zone 'EST', company 'DEMO', and database 'M5Demo'. The main window shows the 'Unit Brief Inventory' report configuration. The 'Schedule Report' dialog box is open, showing the following settings:

- Schedule information for /Reports/Unit/UnitBrief.rpt**
 - Run Interval: Once (dropdown)
 - Date: []
 - Time: []
 - Off Hours: []
 - Last Run: []
- Output Destination**
 - Printer: []
 - In Bin
 - Email: []
 - File: []
 - Report Group: Private (dropdown)
 - Output Format: PDF (dropdown)
 - Save as default for this report only
 - Save as default

Buttons at the bottom of the dialog include 'Schedule - Once' and 'Cancel'.

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)

The screenshot displays the Fleetfocus web application interface. On the left, a red sidebar contains the 'Fleetfocus™' logo and user information: User ID: JOHN OCHIA, Language: English, Time Zone: EST, Company: DEMO, Database: M5Demo, Location: FMAIN - Fleet Maintenance. Below this is a 'Menu:' dropdown and a 'Unit Brief Inventory' link. The main content area features a toolbar with icons for navigation and help. The central panel shows a 'Report Schedule Confirmation' dialog box with the following text:

Unit Brief Inventory

Report Schedule Confirmation (Version 2.3.0)

The UnitBrief report has been successfully scheduled.

Schedule Information

- Your report was assigned job number 36022
- The report is scheduled to execute immediately.
- The report will execute on the m5demo Crystal APS.
- In the long server group.
- The report output will be placed in your private In Bin.
- The report output will be created in directory C:/m5/CE_BIN/m5dm/U-JOHN OCHIA/ as a .pdf file.

Close

PROCEDURE

Close the report confirmation page

1. Click on the Close button.

The screenshot shows the Fleetfocus web interface. On the left is a dark red sidebar with the 'Fleetfocus™' logo and user information: User ID: JOHN OCHIA, Language: English, Time Zone: EST, Company: DEMO, Database: M5Demo, Location: FMAIN - Fleet Maintenance. Below this is a menu with a dropdown arrow and the text 'Unit Brief Inventory'. The main content area has a dark red header with 'Unit Brief Inventory' and a 'Report Schedule Confirmation' (Version 2.3.0) section. The confirmation message states: 'The UnitBrief report has been successfully scheduled.' Below this is a 'Schedule Information' section with a bulleted list of details. At the bottom of the main content area is a 'Close' button.

Report Schedule Confirmation (Version 2.3.0)

The UnitBrief report has been successfully scheduled.

Schedule Information

- Your report was assigned job number 36022
- The report is scheduled to execute immediately.
- The report will execute on the m5demo Crystal APS.
- In the long server group.
- The report output will be placed in your private In Bin.
- The report output will be created in directory C:/m5/CE_BIN/m5dm/U-JOHN OCHIA/ as a .pdf file.

Close

PROCEDURE

Access your M5 In-Bin

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

The screenshot shows the Fleetfocus M5 software interface. On the left is a dark red sidebar with the 'Fleetfocus™' logo and user information: User ID: JOHN OCHIA, Language: English, Time Zone: EST, Company: DEMO, Database: M5Demo, Location: FMAIN - Fleet Maintenance. Below this is a menu of report options, with 'Unit Brief Inventory' highlighted in blue. A red callout box with the text 'The In-Bin button' points to a button with a right-pointing arrow icon in the menu. The main window title is 'Unit Brief Inventory (Version 2.0)'. It contains a 'Parameter File Name' field, 'Group 1' and 'Group 2' dropdowns (both set to 'None'), and a 'Sort By' dropdown (set to 'Unit Number'). Below these is a table titled 'UnitLicenseFilters (Loaded 52 records)'. The table has columns for 'Enabled', 'Field', 'Operator', 'Value', and 'High Value'. The 'License State' row is checked and has 'MN' in the Value column. The 'Unit Status' row is checked and has 'A' in the Value column. At the bottom are three buttons: 'Delete Saved Parameters', 'Save Parameters', and 'Schedule'.

| Enabled | Field | Operator | Value | High Value |
|-------------------------------------|-------------------------|-----------|-------|------------|
| <input type="checkbox"/> | License | equal | | |
| <input checked="" type="checkbox"/> | License State | not equal | MN | |
| <input type="checkbox"/> | License Type | equal | | |
| <input type="checkbox"/> | License Expiration Date | equal | | |
| <input type="checkbox"/> | Bin Location | equal | | |
| <input checked="" type="checkbox"/> | Unit Status | equal | A | |
| <input type="checkbox"/> | Unit Number | equal | | |
| <input type="checkbox"/> | Alt Unit Number | equal | | |

PROCEDURE

View inside the Report Bin (In Bin)

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

FleetFocus™

User ID: JOHN OCHIA
Language: English
Time Zone: EST
Company: DEMO
Database: M5Demo
Location:
FMAIN - Fleet Maintenance

Menu:

Report Bin (Version 2.2.0)

Reports run by or visible to the current user (Loaded 1 records)

| Delete | Report Name | Size | Id | Type | Created | By |
|--------|---------------------|------|----|------|---------|----|
| | n Immediate Reports | | | | | |
| | rivate Reports | | | | | |

The Private Reports button

PROCEDURE

Click on link to the report

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

The screenshot displays the FleetFocus web application interface. On the left is a sidebar with user information: User ID: JOHN OCHIA, Language: English, Time Zone: EST, Company: DEMO, Database: M5Demo, Location: FMAN - Fleet Maintenance. Below this is a menu with a dropdown arrow and a link for "Unit Brief Inventory". The main content area is titled "Report Bin (Version 2.2.0)" and shows a table of reports. A red callout box labeled "Report links" points to the report names in the table.

| Delete | ReportName | Size | Id | Type | Created | By |
|-------------------------------------|--|--------|-------|------|---------------------|------------|
| | Immediate Reports | | | | | |
| <input checked="" type="checkbox"/> | Private Reports | | | | | |
| <input type="checkbox"/> | Unit Brief Inventory Report V2.3 | 178887 | 36022 | pdf | 03/22/2010 11:27:13 | JOHN OCHIA |
| <input type="checkbox"/> | Unit Brief Inventory Report V2.3 | 179600 | 35882 | pdf | 03/19/2010 17:17:01 | JOHN OCHIA |
| <input type="checkbox"/> | Unit Brief Inventory Report V2.3 | 529386 | 35822 | pdf | 03/18/2010 12:49:55 | JOHN OCHIA |
| 3 item(s) found | | | | | | |

PROCEDURE

View the report (print preview window)

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

Unit Brief Inventory

Report Printed: 09/22/2009 11:27:02 By User: JONEN OCHIA

| Unit No | Using Dept | Year | Manufacturer | Make | Model | License | State | In-Service Date | Current Meter |
|---------|------------|------|---------------------|-----------|------------|----------|-------|-----------------|---------------|
| 00054M | 7100 | 2002 | GENERAL MOTORS CORP | CHEVROLET | TAHOE | P00054MA | PA | 11/24/2004 | 0 M |
| 00055M | 7100 | 1997 | FORD MOTOR COMPANY | FORD | EXPLORER | P00055MA | PA | 11/24/2004 | 0 |
| 00153M | 7100 | 2001 | GENERAL MOTORS CORP | CHEVROLET | BLAZER | P00153MA | PA | 11/24/2004 | 65,789 M |
| 00193M | 7100 | 2001 | DAIMLERCHRYSLER | DOODGE | ASTRO | P00193MA | PA | 11/24/2004 | 12 M |
| 00225M | 7100 | 1995 | DAIMLERCHRYSLER | JEEP | CHEROKEE | P00225MA | PA | 11/24/2004 | 0 |
| 00246M | 7100 | 2002 | GENERAL MOTORS CORP | CHEVROLET | BLAZER | P00246MA | PA | 11/24/2004 | 0 M |
| 00254M | 7100 | 2001 | FORD MOTOR COMPANY | FORD | EXPEDITION | P00254MA | PA | 11/24/2004 | 0 M |
| 00269M | 7100 | 2000 | FORD MOTOR COMPANY | FORD | EXPEDITION | P00269MA | PA | 11/24/2004 | 0 |
| 00303M | 7100 | 2001 | GENERAL MOTORS CORP | CHEVROLET | BLAZER | P00303MA | PA | 11/24/2004 | 0 M |
| 00331M | 7100 | 2001 | GENERAL MOTORS CORP | CHEVROLET | BLAZER | P00331MA | PA | 11/24/2004 | 0 M |
| 00334M | 7100 | 1997 | GENERAL MOTORS CORP | CHEVROLET | ASTRO | P00334MA | PA | 11/24/2004 | 0 |
| 00343M | 7100 | 1997 | GENERAL MOTORS CORP | GM | SONOMA | P00343MA | PA | 11/24/2004 | 0 |
| 00357M | 7100 | 1997 | DAIMLERCHRYSLER | JEEP | CHEROKEE | P00357MA | PA | 11/24/2004 | 0 M |
| 00359M | 7100 | 2003 | GENERAL MOTORS CORP | CHEVROLET | BLAZER | P00359MA | PA | 11/24/2004 | 0 M |
| 00366M | 7100 | 2001 | GENERAL MOTORS CORP | CHEVROLET | BLAZER | P00366MA | PA | 11/24/2004 | 0 M |
| 00381M | 7100 | 2002 | GENERAL MOTORS CORP | CHEVROLET | BLAZER | P00381MA | PA | 11/24/2004 | 0 M |
| 00393M | 7100 | 2001 | GENERAL MOTORS CORP | CHEVROLET | BLAZER | P00393MA | PA | 11/24/2004 | 0 M |
| 00472M | 7100 | 2001 | FORD MOTOR COMPANY | FORD | TAURUS | P00472MA | PA | 11/24/2004 | 0 M |
| 00568M | 7100 | 2002 | FORD MOTOR COMPANY | FORD | TAURUS | P00568MA | PA | 11/24/2004 | 25,000 M |
| 00731M | 7100 | 2003 | GENERAL MOTORS CORP | CHEVROLET | BLAZER | P00731MA | PA | 11/24/2004 | 0 M |
| 00804M | 7100 | 2003 | GENERAL MOTORS CORP | CHEVROLET | BLAZER | P00804MA | PA | 11/24/2004 | 0 M |
| 00805M | 7100 | 2000 | GENERAL MOTORS CORP | CHEVROLET | ASTRO | P00805MA | PA | 11/30/2004 | 0 |
| 00818M | 7100 | 2003 | GENERAL MOTORS CORP | CHEVROLET | BLAZER | P00818MA | PA | 11/30/2004 | 0 M |
| 00845M | 7100 | 2003 | GENERAL MOTORS CORP | CHEVROLET | BLAZER | P00845MA | PA | 11/30/2004 | 0 M |
| 00848M | 7100 | 2003 | GENERAL MOTORS CORP | CHEVROLET | BLAZER | P00848MA | PA | 11/30/2004 | 0 M |

FileFocus M5 - UNITBRIEF - Unit Brief Inventory Report V2.3 Page 1 of 39

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.

Click on the Printer icon to print the report

Click on the Disk icon to save the report

Click on the X to close the window

| Using Dept | Year | Manufacturer | Make | Model | License | State | In-Service Date | Current Meter | |
|------------|------|---------------------|---------------------|------------|------------|----------|-----------------|---------------|----------|
| 7100 | 2002 | GENERAL MOTORS CORP | CHEVROLET | TANDE | P6004MA | PA | 11/24/2004 | 0 M | |
| 7100 | 1997 | FORD MOTOR COMPANY | FORD | EXPLORER | P60055MA | PA | 11/24/2004 | 0 | |
| 7100 | 2001 | GENERAL MOTORS CORP | CHEVROLET | BLAZER | P60153MA | PA | 11/24/2004 | 65,789 M | |
| 7100 | 2001 | DAIMLERCHRYSLER | DODGE | ASTRO | P60199MA | PA | 11/24/2004 | 12 M | |
| 7100 | 1995 | DAIMLERCHRYSLER | JEEP | CHEROKEE | P60225MA | PA | 11/24/2004 | 0 | |
| 7100 | 2002 | GENERAL MOTORS CORP | CHEVROLET | BLAZER | P60246MA | PA | 11/24/2004 | 0 M | |
| 7100 | 2001 | FORD MOTOR COMPANY | FORD | EXPEDITION | P60254MA | PA | 11/24/2004 | 0 M | |
| 00269M | 7100 | 2000 | FORD MOTOR COMPANY | FORD | EXPEDITION | P60269MA | PA | 11/24/2004 | 0 |
| 00303M | 7100 | 2001 | GENERAL MOTORS CORP | CHEVROLET | BLAZER | P60303MA | PA | 11/24/2004 | 0 M |
| 00331M | 7100 | 2001 | GENERAL MOTORS CORP | CHEVROLET | BLAZER | P60331MA | PA | 11/24/2004 | 0 M |
| 00344M | 7100 | 1997 | GENERAL MOTORS CORP | CHEVROLET | ASTRO | P60344MA | PA | 11/24/2004 | 0 |
| 00343M | 7100 | 1997 | GENERAL MOTORS CORP | GMC | SONOMA | P60343MA | PA | 11/24/2004 | 0 |
| 00375M | 7100 | 1997 | DAIMLERCHRYSLER | JEEP | CHEROKEE | P60375MA | PA | 11/24/2004 | 0 M |
| 00399M | 7100 | 2003 | GENERAL MOTORS CORP | CHEVROLET | BLAZER | P60399MA | PA | 11/24/2004 | 0 M |
| 00466M | 7100 | 2001 | GENERAL MOTORS CORP | CHEVROLET | BLAZER | P60466MA | PA | 11/24/2004 | 0 M |
| 00381M | 7100 | 2002 | GENERAL MOTORS CORP | CHEVROLET | BLAZER | P60381MA | PA | 11/24/2004 | 0 M |
| 00393M | 7100 | 2001 | GENERAL MOTORS CORP | CHEVROLET | BLAZER | P60393MA | PA | 11/24/2004 | 0 M |
| 00472M | 7100 | 2001 | FORD MOTOR COMPANY | FORD | TALUS | P60472MA | PA | 11/24/2004 | 0 M |
| 00568M | 7100 | 2002 | FORD MOTOR COMPANY | FORD | TALUS | P60568MA | PA | 11/24/2004 | 25,000 M |
| 00731M | 7100 | 2003 | GENERAL MOTORS CORP | CHEVROLET | BLAZER | P60731MA | PA | 11/24/2004 | 0 M |
| 00804M | 7100 | 2003 | GENERAL MOTORS CORP | CHEVROLET | BLAZER | P60804MA | PA | 11/24/2004 | 0 M |
| 00805M | 7100 | 2000 | GENERAL MOTORS CORP | CHEVROLET | ASTRO | P60805MA | PA | 11/30/2004 | 0 |
| 00818M | 7100 | 2003 | GENERAL MOTORS CORP | CHEVROLET | BLAZER | P60818MA | PA | 11/30/2004 | 0 M |
| 00845M | 7100 | 2003 | GENERAL MOTORS CORP | CHEVROLET | BLAZER | P60845MA | PA | 11/30/2004 | 0 M |
| 00848M | 7100 | 2003 | GENERAL MOTORS CORP | CHEVROLET | BLAZER | P60848MA | PA | 11/30/2004 | 0 M |

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).

The screenshot displays the Fleetfocus M5 Home Page. On the left, a red sidebar contains user information: User ID: JOHN OCHIA, Language: English, Time Zone: EST, Company: DEMO, Database: M5Demo, and Location: FMAIN - Fleet Maintenance. Below this is a menu search box and a list of reports. The main content area, titled 'Home Page (Version 2.3.0)', features a grid of icons for various functions: Unit Main, Work Order, Shop Portal, Work Request Main, Preferred Vendors, Labor Wedge, Work Order Query, Replacement Model, Part Inventory Location, Purchase Order, NAPA Online, and Access Freightliner. A red callout bubble with a pointer to the 'Unit Brief Inventory' link in the left menu contains the text: 'Click on the Unit Brief Inventory report link.'

Fleetfocus™

User ID: JOHN OCHIA
Language: English
Time Zone: EST
Company: DEMO
Database: M5Demo
Location: FMAIN - Fleet Maintenance

Menu:

- Unit Assignment History
- Unit Assignment List
- Unit Association
- Unit Brief Inventory
- Unit Capital Journal
- Unit Capitalization Journal
- Unit Classification
- Unit Copy
- Unit Cost History
- Unit Cost History Display
- Unit Cost Per Use
- Unit Cost Use Summary
- Unit Current Meter Reading
- Unit Depreciation
- Unit Depreciation Journal
- Unit Disposal

Home Page (Version 2.3.0)

Unit Main, Work Order, Shop Portal, Work Request Main, Preferred Vendors, Labor Wedge, Work Order Query, Replacement Model, Part Inventory Location, Purchase Order, NAPA Online, Access Freightliner

Click on the Unit Brief Inventory report link.

PROCEDURE

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

Fleetfocus™

User ID: JOHN OCHIA
Language: English
Time Zone: EST
Company: DEMO
Database: M5Demo
Location: FMAIN - Fleet Maintenance

Menu:

Unit Brief Inventory

Unit Brief Inventory (Version 2.0)

Parameter File Name:

Options
Layout: Standard

Report Prompts
Group 1: None
Group 2: None
Sort By: Unit Number

UnitLicenseFilters (Loaded 52 records)

| Enabled | Field | Operator | Value | High Value |
|--------------------------|-------------------------|----------|-------|------------|
| <input type="checkbox"/> | License | equal | | |
| <input type="checkbox"/> | License State | equal | | |
| <input type="checkbox"/> | License Type | equal | | |
| <input type="checkbox"/> | License Expiration Date | equal | | |
| <input type="checkbox"/> | Bin Location | equal | | |
| <input type="checkbox"/> | Unit Status | equal | | |
| <input type="checkbox"/> | Unit Number | equal | | |
| <input type="checkbox"/> | Alt Unit Number | equal | | |

Delete Saved Parameters Save Parameters Schedule

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.

Search **Parameters for Report /REPORTS/UNIT/UNITBRIEFPARM.ASPX**
(Version 2.2.0)

Advanced Search

Name:

Date Saved: >=

| Name | Date Saved |
|-----------------------------------|---------------------|
| ACTIVE NON-MINNESOTA UNITS REPORT | 03/19/2010 17:15:15 |
| WEEKLY DISPOSAL REPORT | 03/18/2010 12:38:11 |

End of list (2 items)

Double-click on the report

Done Internet 100%

PROCEDURE

- The report page should display.

The screenshot displays the Fleetfocus software interface. On the left is a navigation sidebar with the Fleetfocus logo and user information: User ID: JOHN OCHIA, Language: English, Time Zone: EST, Company: DEMO, Database: M5Demo, Location: FMAIN - Fleet Maintenance. Below this are icons for various functions and a menu dropdown. The main content area is titled "Unit Brief Inventory (Version 2.0)" and shows the configuration for a report with the parameter file name "ACTIVE NON-MINNESOTA UNITS REPORT".

Parameter File Name: ACTIVE NON-MINNESOTA UNITS REPORT

Options

Layout: Standard

Report Prompts

Group 1: None

Group 2: None

Sort By: Unit Number

UnitLicenseFilters (Loaded 52 records)

| Enabled | Field | Operator | Value | High Value |
|-------------------------------------|-------------------------|-----------|-------|------------|
| <input type="checkbox"/> | License | equal | | |
| <input checked="" type="checkbox"/> | License State | not equal | MN | |
| <input type="checkbox"/> | License Type | equal | | |
| <input type="checkbox"/> | License Expiration Date | equal | | |
| <input type="checkbox"/> | Bin Location | equal | | |
| <input checked="" type="checkbox"/> | Unit Status | equal | A | |
| <input type="checkbox"/> | Unit Number | equal | | |
| <input type="checkbox"/> | Alt Unit Number | equal | | |

Buttons: Delete Saved Parameters, Save Parameters, Schedule

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).

The screenshot displays the Fleetfocus M5 Home Page. The top navigation bar includes icons for Home, Reports, Favorites, Print, Close, Refresh, Help, and Search. The main content area is titled "Home Page (Version 2.3.0)" and features a grid of report links: Unit Main, Work Order, Shop Portal, Work Request Main, Preferred Vendors, Labor Wedge, Work Order Query, Replacement Model, Part Inventory Location, Purchase, NAPA Online, and Access Freightliner. On the left, a sidebar menu lists various reports, with "Unit Brief Inventory" highlighted by a red callout box. The callout box contains the text: "Click on the Unit Brief Inventory report link."

PROCEDURE

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

Fleetfocus™

User ID: JOHN OCHIA
Language: English
Time Zone: EST
Company: DEMO
Database: M5Demo
Location:
FMAIN - Fleet Maintenance

Menu:

Unit Brief Inventory

Parameter File Name: ACTIVE NON-MINNESOTA UNITS REPORT

Options
Layout: Standard

Report Prompts
Group 1: None
Group 2: None
Sort By: Unit Number

UnitLicenseFilters (Loaded 52 records)

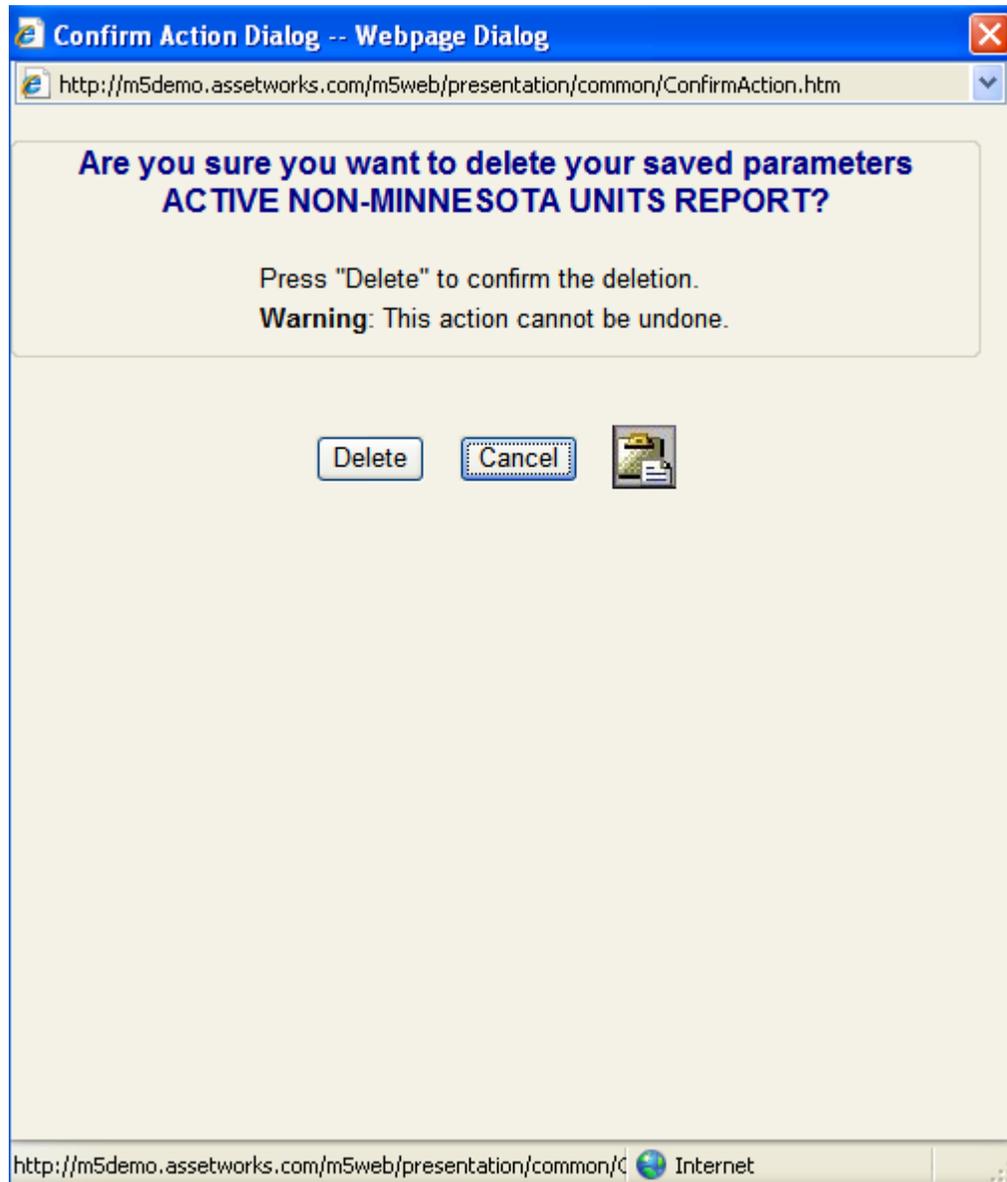
| Enabled | Field | Operator | Value | High Value |
|-------------------------------------|-------------------------|-----------|-------|------------|
| <input type="checkbox"/> | License | equal | | |
| <input checked="" type="checkbox"/> | License State | not equal | MN | |
| <input type="checkbox"/> | License Type | equal | | |
| <input type="checkbox"/> | License Expiration Date | equal | | |
| <input type="checkbox"/> | Bin Location | | | |
| <input checked="" type="checkbox"/> | Unit Status | | | |
| <input type="checkbox"/> | Unit Number | | | |
| <input type="checkbox"/> | Alt Unit Number | equal | | |

Delete Saved Parameters Save Parameters Schedule

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.

The screenshot displays the Fleetfocus M5 Home Page. On the left, a red sidebar contains the 'Fleetfocus™' logo and user information: User ID: JOHN OCHIA, Language: English, Time Zone: EST, Company: DEMO, Database: M5Demo, Location: FMAIN - Fleet Maintenance. Below this is a 'Menu:' dropdown and two links: 'Crystal Enterprise Monitor - Company' and 'Crystal Enterprise Monitor - User'. The main content area features a 'Home Page (Version 2.3.0)' header and a grid of 12 application tiles: Unit Main, Work Order, Shop Portal, Work Request Main, Preferred Vendors, Labor Wedge, Work Order Query, Replacement Model, Part Inventory Location, Purchase Orders, NAPA Online, and Access Freightliner. A top navigation bar includes icons for home, search, and help.

PROCEDURE

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

Fleetfocus™

User ID: JOHN OCHIA
Language: English
Time Zone: EST
Company: DEMO
Database: M5Demo
Location: FMAIN - Fleet Maintenance

Menu:

- ◆ Crystal Enterprise Monitor - Company
- ▶ Crystal Enterprise Monitor - User

Crystal Enterprise Monitor - User (Version 2.2.0)

Query Limits
Maximum reports to retrieve: All

Crystal Enterprise Reports (Loaded 3 records)

| Id | State | ReportName | Submitted | By | Group |
|-------|-----------|--|---------------------|------------|-------|
| 36022 | Completed | UNITBRIEF - Unit Brief Inventory Report V2.3 | 03/22/2010 11:26:51 | JOHN OCHIA | |
| 35882 | Completed | UNITBRIEF - Unit Brief Inventory Report V2.3 | 03/19/2010 17:16:39 | JOHN OCHIA | |
| 35822 | Completed | UNITBRIEF - Unit Brief Inventory Report V2.3 | 03/18/2010 12:48:57 | JOHN OCHIA | |