



RECEIVED
JAN 24 2024

January 22, 2024

Mr. Ivan D. Butts
President
National Association of Postal Supervisors
1727 King St, STE 400
Alexandria, VA 22314-2753

Certified Mail Tracking Number:
7020 3160 0002 0328 0310

Dear Ivan:

As a matter of general interest, the Postal Service is working to modernize its vehicle asset management software. Fleet Operations plans to transition from the current system, Solution for Enterprise Asset Management (SEAM), to a system called, Fleet Management Information System (FMIS).

The FMIS uses an AssetWorks' commercial off-the-shelf (COTS) Fleet Focus software, platform. The FMIS is intended to provide a more efficient and effective operation by integrating with recently deployed telematics. The communication between the telematics and FMIS allows for the integration of vehicle defect and vehicle utilization reporting, which is anticipated to improve safety, increase productivity, and reduce costs.

A proof of concept was conducted locally at the Anaheim, California Processing and Distribution Center (P&DC). A relaunch of the FMIS is scheduled to "go live" on January 29, at the Anaheim, CA P&DC, including additional functionality to include consignment inventory.

If testing of the FMIS, with the consignment inventory, at the Anaheim, CA P&DC is successful, eleven additional sites are scheduled to "go live" on February 20. Full implementation of FMIS nationwide is tentatively scheduled to be completed by the end of August.

Enclosed on compact disc (CD) are the following FMIS reference documents:

- FMIS deployment schedule
- Labor Wedge Quick guide v23.0
- EDGE for M5 – Technician User Guide 23.0
- Physical Inventory Management Quick Guide v23.0
- Edge for M5 – Storekeeper User Guide 23.0
- Core Processing Overview Quick Guide v23.0

If there are any questions, please contact Robert Ocasio at 813-382-0689.

Sincerely,

A handwritten signature in blue ink, appearing to read "Shannon R. Richardson".

Shannon R. Richardson
Director
Contract Administration (APWU)

Enclosure

Core Processing Overview

Reference Guide

Version 23.0.x | March 2023

Overview and Summary

The idea of tracking core credits has been existence in the fleet world for some time. However, the way that core credits are tracked and issued varies greatly among our fleet customers. The result of core tracking is to receive a credit from the vendor when returning a part that contains a core.

Core parts are identified by the vendor along with the potential value of the credit. It comes down to two questions. What does a core credit consist of and how can it be done in a fleet software package? The core credit itself is never definitive. Our clients are not guaranteed a core credit once it is returned to the vendor.

There are two main factors that determine if the full value of the core credit will be honored. The first is the condition of the core when it's returned. The second is that it's returned in a timely manner. One important piece to this functionality is to remember that the core charge and credit have no monetary value unless it is charged out with the work order part issue transaction or until the core credit has been applied using the Core Claim functionality.

The core value is tracked throughout the part's life with every transaction in the Part Journal table. This will allow our clients to report on all parts with cores and what the potential core value is. But money is NOT part of the process unless the core charge is issued to the work order or the credit has been entered for that charge. There are two main areas of core processing functionality in M5.

First is the ability to track the issuing and cost of parts with cores for reporting purposes. Second is to capture the data for the core itself that needs to be returned to the vendor for credit.

Once the vendor receives the core and issues the credit a work order credit transaction is done to assign it to the entity billed on the work order.

1. Functionality

Currently, M5 has 2 fields on the part_inv_loc table that pertain to cores.

They are **core charge** and **core tracking Y/N**. These fields are used to identify parts that have a core charge.

There are four main transactions that will record data in regard to parts with cores. They are receipts, transfers, issues and return to vendor.

The part can be either stock or non-stock. It is important to remember that even though we are tracking the core charge there is no physical money to be held until the credit comes in from the vendor (see more below about core tracking).

The core charge as it exists on these transactions is simply a potential core credit to be used for reporting purposes only. The secondary part of this functionality is the ability to track the actual core itself once it is removed from a unit. This is called core tracking.

2. Configuration

Part Main and Inventory Location Manager contain the fields called core charge and core flag. They can be updated from the Part Main record or at the inventory location level. The functionality for core tracking will use both fields to identify parts with a core and their charge. There are no limitations on the whether the part is stock or non-stock, either can have a core.

System Flags

There are two system flags to support the new core tracking functionality. They are:

5208 – “Use Core Tracking? (Y/N)” - This flag when set to "Y" will add Core transactions to the Core Tracking Frame. When this flag is set to "N" it will not add core transactions to the Core Tracking Frame.

5209 – “Add Core Charge to part issue extended cost? (Y/N)” - This flag when set to "Y" will add Core Charge to the extended line cost for Part Issues.

3. Part with Core Purchased

When a part with a core charge is ordered by placing it on a purchase order, the core charge is a new column on the PO with the value indicated on the part inventory location record. If the part does not exist in inventory yet and is being created as part of the purchase order process, then the core charge can be entered when creating the part or it can be entered on the row in the Purchase Order Main screen.

A core charge from the part inventory location record can be changed by the user if needed while adding the row to the Purchase Order screen. The part with the core transaction will be stored in the part journal for reporting of parts with core purchases.

4. Part with Core Received in Inventory

Parts that have core charges will show the core cost on the packing slip or invoice sent by the vendor. If the part with a core is being received using an M5 generated purchase order the core charge amount will be the value from the Part Inventory Location Manager. The core charge can be changed if needed during the receipt process using a new column in the part receipt frame (or part issue for non-stock parts). The core charge will be stored in the part journal when the receipt transaction is posted.

5. Part with Core Issued from Inventory

When a part with a core is issued, M5 identifies it as having a core and creates a row in the new Core tracking screen. The Core tracking stores parts with cores in various statuses:

- **Cancelled** – The core is destroyed; the core credit is not applicable or the part with the core has been returned.
- **Waiting** – This is the default status that starts the core tracking process.
- **Sent to vendor** – The core has been returned to vendor.
- **Transferred** – The core is transferred to another inventory location.
- **Finalized** – The full or partial credit has been applied to the work order.

When a part with a core is issued using Work Order Main or Part Issue, the new field called core cost can only be changed or added while the part is being issued. Selecting the check box on the part issue row called charge core will charge the core amount to the total extended cost of the part.

Once the part issue is saved the core charge can no longer be modified. If the core charge needs to be changed, then it should be done from the Core Tracking Screen after the part has been issued. The Core Tracking Screen will show the transaction in a status of “waiting” along with the work order/unit details related to the core. The user can review and adjust the core charge on the transaction and submit the core return memo report to a particular vendor using the print icon. Once the claim credit has been received, the status of the core in the Core Tracking screen can be changed to “finalized”.

Work Order Main allows the user to print a part tag which can be used during the Core Tracking process. The part tag can be printed by selecting the print tag check box on the part issue row then by clicking the print part tag icon. The part tag contains information such as work order number, unit number and date part was issued. It prints in large font on a regular 8.5” x 11” paper that can be attached to the part for labeling purposes.

6. Part with Core Transfers

When a part with a core is transferred from one location to another, the core charge from the receiving location will be used on the Part Transfer screen. If the part being transferred is not on inventory at the receiving location (as either stock or non-stock) then the core charge from the shipping location will be used. The core charge will be displayed as a column on the Part Transfer Request screen only and can be changed by the user if necessary.

Once the transfer is received at the receiving location, the core charge will be part of the receipt transaction in the part journal. This process is used to transfer parts with cores – not just the cores themselves. If the core is transferred the receiving location must be entered. The transfer of the core is done automatically. The location being sent the core does not have to manually receive the core. It will appear on the Core Tracking screen for that location along with a note indicating where it came from.

7. Part Returns with Core Charge

The core charge will follow thru to the return process as a transaction in the part journal when a part with a core is returned from a unit, department, component, work order or stock inventory. The core charge will be a negative amount which is the same as the part cost during a part return. If there is a Core Tracking record for this part it will be updated to a status of “cancelled”.

This will be the case for part returns from stock to the vendor as well as part returns that have been issued. The only process that deals with part returns that will not have a core charge associated to it is negative receipts. This negative receipt process is designed to return obsolete stock parts to any vendor at any price therefore core charge cannot be determined.



FleetFocus EDGE for M5 - Storekeeper User Guide

Version 23.0.x | April 2023

Copyright © 2023 AssetWorks Inc. its subsidiaries. All rights reserved.

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 e-mail, 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

E-mail: M5Support@AssetWorks.com

Web Site: Community.AssetWorks.com

The support web site 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.

FleetFocus EDGE for M5 - Storekeeper - User Guide

Version 23.0.x

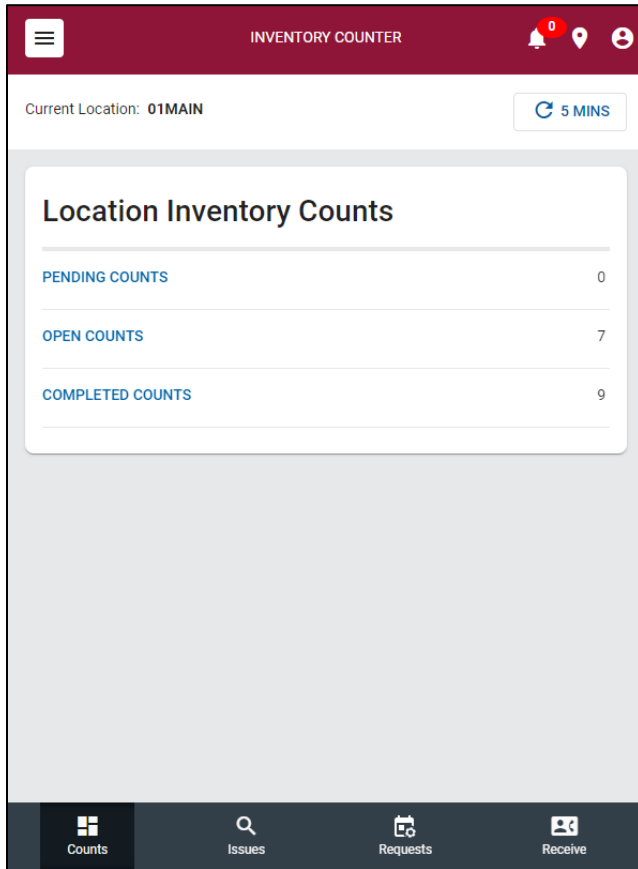
April 2023

Contents

- Inventory Counter 1**
 - My Inventory Counts – Pending Counts 2
 - My Inventory Counts – Open Counts 5
 - My Inventory Counts – Completed Counts 6
- Issue Part Search 7**
- Part Requests 9**
 - Parts Viewer 11
 - Part Notes 12
 - Part Information 13
 - Stock Locations 14
 - Cross References 14
 - Purchase Orders 15
 - Vendors 15
 - Transfers 16
 - Issues 16
 - Serial Information 17
 - Select Action 17
- Part Receipts 18**
 - Purchase Order Details 20
 - Taxes and Discounts 22
 - Putaway List 23

Inventory Counter

An important aspect of any shop is to keep inventory stocked and counted. Inventory Counter allows Counters to count inventory while the Storekeeper tracks progress by pending, open, and completed counts. Counts are displayed based on current location.



My Inventory Counts – Pending Counts

Pending counts have not been started by any Counter. Select a Count ID to display an Inventory Count Details screen with each item that needs to be counted. The Inventory Count Details screen displays different tabs can be selected (All, Not Counted, Counted) which displays the current count totals of each item.

Inventory Count Details
 Count ID: WC-2013-0000002
 Description:
 Location: CHARLES ST WAREHOUSE
 Progress: 73% (16 of 22)

Count Items

ALL (22) NOT COUNTED (6) COUNTED (16)

| Item No. | Bin Location | Part ID | Counted Parts | Modified | Note |
|----------|--------------|----------------------------------|---------------|------------------|------|
| 10 | | RES09036-0 FILTER FUEL | 4 | 8/28/20 by WD | |
| 11 | | 0124120001-0 ALTERNATOR | 4 | 8/28/20 by WD | |
| 12 | CTR6 | CA10700-0 RESISTOR FAN | 4 | 9/1/20 by WD | |
| 13 | | 05123-0 PAPER TOWELS | 4 | 7/9/22 by WD | |
| 14 | | 002-9110-0 ADJUSTER CHAIN | 7 | 9/24/20 by WD | |
| 15 | | 000-9020-0 ADJUSTER CHAIN | 4 | 9/2/20 by WD | |
| 16 | | 00049502-0 GAUGE TEMP | 1 | 9/24/20 by WD | |
| 17 | | TCA13896-0 PUMP HYDRAULIC | ? | | |
| 18 | | 00917816000-0 FILTER SHOP VAC | ? | | |
| 19 | G4F | 05061-0 CLEANER FUEL | ? | | |

Items are organized by Item Number which is created from the initial count setup in M5. Before an item is counted, a “?” icon is displayed:

Count Items

ALL (1) NOT COUNTED (1) COUNTED (0)

| Item No. | BIN Location | Part ID | Counted Parts | Modified | Item No. |
|----------|--------------|--|---------------|----------|----------|
| 1 | | 904-5202 VARIABLE PRESSURE OUTPUT DEVIC | ? | | |

Inventory Counter

After the item has been viewed and a count is added, the item will have a green checkmark next to the total count. The Counter can tap Lookup Part on the top right of the screen to search and add an item to the count adhoc.

Tap the blue scan button in the middle of the screen to scan a part number or bin number. If the result is unique, it jumps to that line and displays a popup to enter a quantity. If there are multiple results, the Park Lookup screen displays to select a part.

PART LOOKUP

40

PART BINS ON COUNT

FILTER COMPRESSOR (COMPRESSOR FILTER ONLY) - 2601540300-0
MANUFACTURER:
PART KEYWORD/TYPE: FILTER
LAST COUNTED: [JUMP TO BIN](#)

REINFORCEMENT - 61403-47020-0
MANUFACTURER:
PART KEYWORD/TYPE: REINFORCEMENT
LAST COUNTED: [JUMP TO BIN](#)

ROLLER - TF3405-0
MANUFACTURER:
PART KEYWORD/TYPE: ROLLER
LAST COUNTED: [JUMP TO BIN](#)

PART BINS NOT ON COUNT

PAD BRAKE REAR - 02040J2617-0
MANUFACTURER:
PART KEYWORD/TYPE: PAD
LAST COUNTED: [ADD BIN](#)

COUPLER DEICER PUMP - 04038-025-00-0
MANUFACTURER: SWENSON
PART KEYWORD/TYPE: COUPLER
LAST COUNTED: [ADD BIN VV2E](#)

STEEL COUPLING - 04038-027-00-0
MANUFACTURER: SWENSON
PART KEYWORD/TYPE: COUPLING
LAST COUNTED: [ADD BIN](#)

CHAIN DRAG - 04045-137-00-0
MANUFACTURER: SWENSON
PART KEYWORD/TYPE: CHAIN
LAST COUNTED: [ADD BIN CHAINS](#)

Selecting a Part ID will display an Item Detail screen which shows more information about an item, including a picture if available. Item quantities are based on the item settings so a quantity could be by each item, weight, box, or if it is a liquid, it could be by gallon. The Counter can use the (-) or the (+) button to enter the numbers or tap on the field and insert the number using the keyboard or Speech to Text feature on their device. The Clear button will zero out the number. At the bottom of the view is their employee number, item number, and total items in the count so the Counter knows what line item they are on and how many are left. The Next and Previous button will take them through the list or the back button at the top left of the view can be used to go back to the list page. The scan button at the top right will also navigate to the item that is scanned if it is included in the count.

The screenshot displays the 'My Inventory' app interface for item BR134AP. The header bar is orange and contains a back arrow, the text 'My Inventory BR134AP', and a scan icon. The main content area is white and lists the following details: 'PART DESCRIPTION: FREON', 'PART ID: BR134AP', 'PART MANUFACTURER ID: NAPA', 'BIN: 150', and 'PART KEYWORD:'. Below this information is a quantity input section featuring a blue minus button, a grey box with the number '137', and a blue plus button. Underneath the number is the unit 'LB' and a 'CLEAR' button. At the bottom of the screen, it shows 'COUNTED: E0006215' and '1 of 13'. A blue footer bar contains 'PREVIOUS' and 'NEXT' buttons.

My Inventory Counts – Open Counts

Open Counts are counts that have been started by a Counter, but not yet completed. Count progress can be seen in the far right column. The percentage shows the Counter how much of the count has been completed and the number of items next to it. The circle will eventually complete and turn green when at 100%.

< LOCATION INVENTORY COUNTS

PENDING (0) OPEN (7) COMPLETED (9)

7 Open Inventory Counts
Current Location: 01MAIN

| Count ID | Last Modified | Assigned to | Progress |
|----------|-----------------------|-------------|----------|
| 0000078 | 3/9/23 22 days ago | | |
| 0000084 | 3/9/23 21 days ago | | |


My Inventory Counts – Completed Counts

Completed Counts are counts that have been completed by a Counter. The date the count was completed and the number of items are recorded on the table. The Counter can view the count but cannot alter the information.

The screenshot shows a mobile application interface for 'MY INVENTORY COUNTS'. At the top, there is a dark red header with a menu icon on the left, the title 'MY INVENTORY COUNTS' in the center, and a location pin and refresh icon on the right. Below the header, there are three tabs: 'PENDING (1)', 'OPEN (2)', and 'COMPLETED (1)'. The 'COMPLETED (1)' tab is selected and highlighted with a red underline. Below the tabs, the text '1 Completed Inventory Counts' is displayed, followed by 'Last 7 days'. A table with the following columns is shown: 'Count ID', 'Location', 'Completed', and 'No. of Items'. The table contains one row of data: 'WC-2016-0000005', 'CHARLES ST WAREHOUSE', '3/23/16' (with '1603 days ago' below it), and '1'. At the bottom of the screen, there is a dark navigation bar with five icons: 'Search', 'Timecard', 'Home', 'Work', and 'Parts'.

| Count ID | Location | Completed | No. of Items |
|---------------------------------|----------------------|--------------------------|--------------|
| WC-2016-0000005 | CHARLES ST WAREHOUSE | 3/23/16 1603 days ago | 1 |

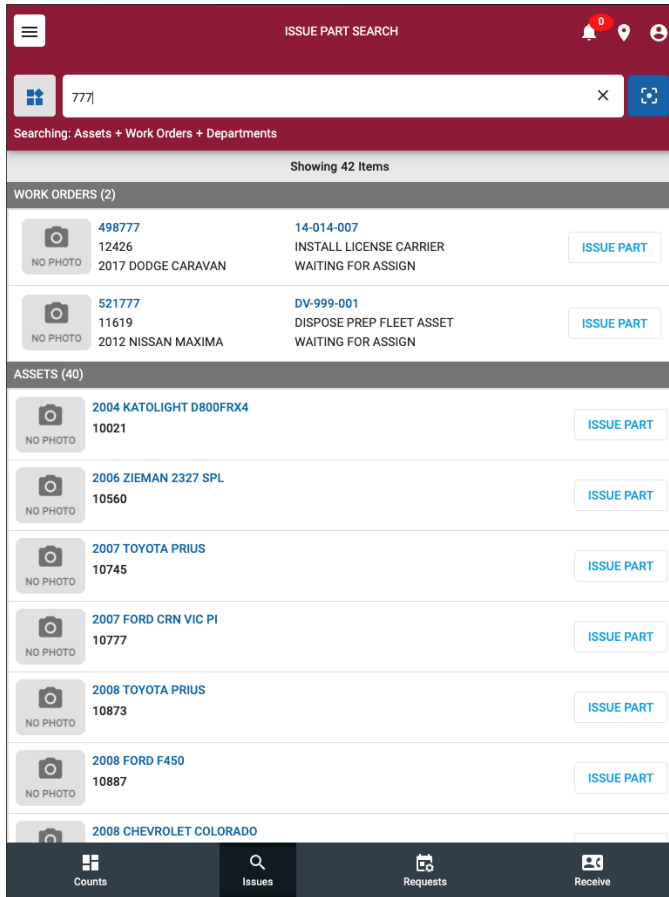
Issue Part Search

The Issue Part Search screen allows a Storekeeper to issue a part on the fly to an Asset, Work Order, or Department. Tapping the  icon allows the Storekeeper to filter what they want to search for by Exact Search or filter by Asset, Work Order or Department.



Note: EDGE Settings **Parts.Asset.CanIssue** and **Parts.Department.CanIssue** control whether parts can be issued for assets or departments.

Tap the Scan button to the right of the Search bar to scan a barcode. The Storekeeper can also tap the Work Order ID, Asset ID, Department ID, or Job Code for further details.



Issue Part Search

Tapping the Issue button to the right of an item displays an Issue Part screen where parts can be issued. See the *EDGE – Technician User Guide* for more information about this process.

CANCEL ISSUE PART

Work Order 498777

Job INSTALL LICENSE CARRIER
14-014-007

Part Location Rooney Police Substation
10R00N

PART INFO STANDARD PARTS RESERVES (0)

PART LOOKUP

Part ID ...

Part Description

Quantity * 1 On Hand Available

ADD TO CART

Part Requests

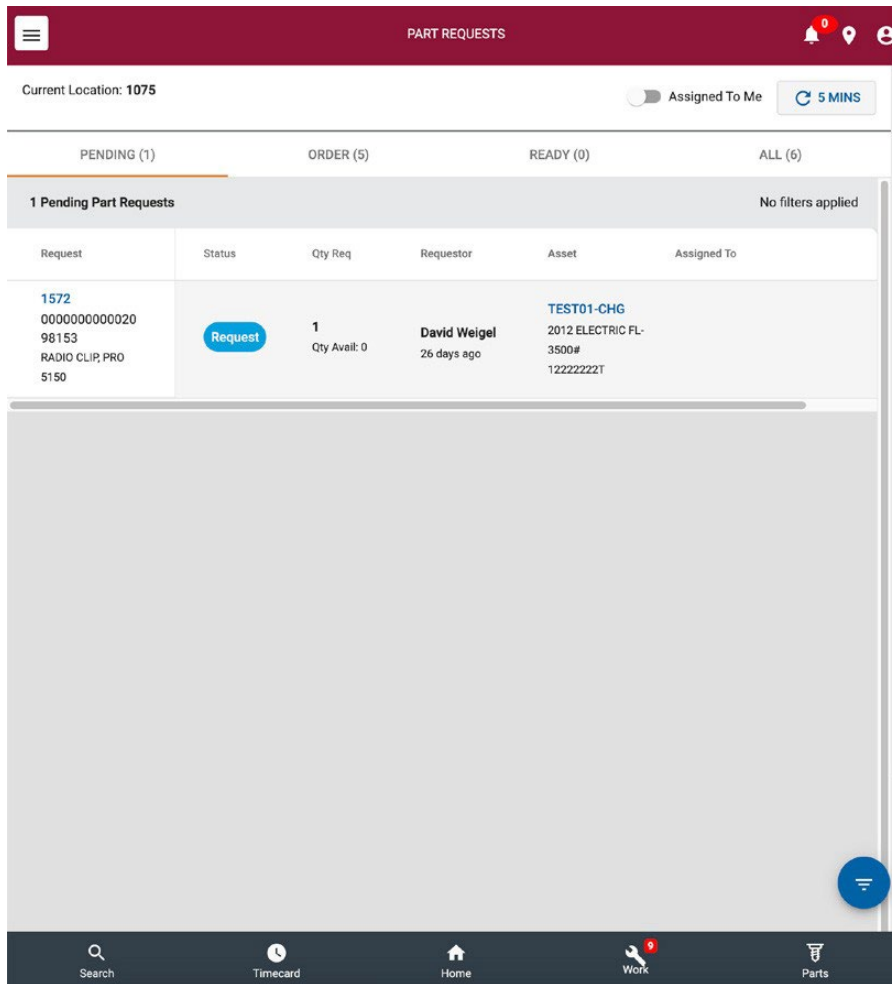
Part Requests can be one of four statuses:

Pending - These are requests where the Storekeeper needs to make a decision.

Order - These are requests that have been ordered.

Ready - These requests are in stock and are ready to be picked up.

All - This is every part request that exists at the Storekeeper's location.



By tapping the Request ID, the Storekeeper can open a panel that contains more information about the request as well as act on the request itself:

Part Requests

PART REQUESTS

PENDING (1) ORDER (5) READY (0) ALL (6)

| Request | Status | Qty Req | Requestor |
|--|---------|-------------------|-----------------------------|
| 1572 000000000020 98153 RADIO CLIP, PRO 5150 | Request | 1 Qty Avail: 0 | David Weigel 26 days ago |

Part Details

Part: **RADIO CLIP, PRO 5150**
00000000002098153

Manufacturer Part Number

Manufacturer: **UNKNOWN**

Quantity: 1

On Hand: 0

Available: 0

Unit Cost: CA\$0.00

Serial

Vendor

Primary Bin

Request Details

Request Status: Request

Asset: 2012 ELECTRIC FL-3500#
TEST01-CHG

Job: TROUBLESHOOT COMMUNICATION UNIT
09-08-003

Work Order: 9000004905

Failure Code

Core Charge

Approval Needed: YES

On the top of this panel there are 2 buttons: Parts Viewer and Select Action. Each button is described in more detail below.

Parts Viewer

Parts Viewer goes to a more detailed view that contains information about the part. This is only accessible if the part was requested with a Part ID and not a comment.

The screenshot displays the 'PART VIEWER' interface for a part with ID 00000000002012327. The header bar is orange and contains the part name 'OIL, PENETRATING WITH SILICONE'. Below the header, the 'Manufacturer' is listed as 'UNKNOWN' and the 'Stock Status' is 'NOT DEFINED AT LOCATION'. A table shows the stock status for 'NORMANDIE & COMPLEX MAINTENANCEs' with columns for 'Total Quantity', 'Reserved', 'Available', and 'Value'. The 'ON-HAND' row shows 0 total quantity and 0 available quantity. Below the table is a list of navigation options: PART NOTES (with a warning icon), PART INFORMATION, STOCK LOCATIONS, CROSS REFERENCES, PURCHASE ORDERS, VENDORS, TRANSFERS, ISSUES, and SERIAL INFORMATION. At the bottom is a dark navigation bar with icons for Search, Time Card, Home, Work (with a red '27' notification), and Parts.

| | Total Quantity | Reserved | Available | Value |
|---|----------------|----------|-----------|-------|
| NORMANDIE & COMPLEX MAINTENANCEs | | | | |
| ON-HAND | 0 | | 0 | |
| ON ORDER | | | | |
| IN TRANSIT | | | | |

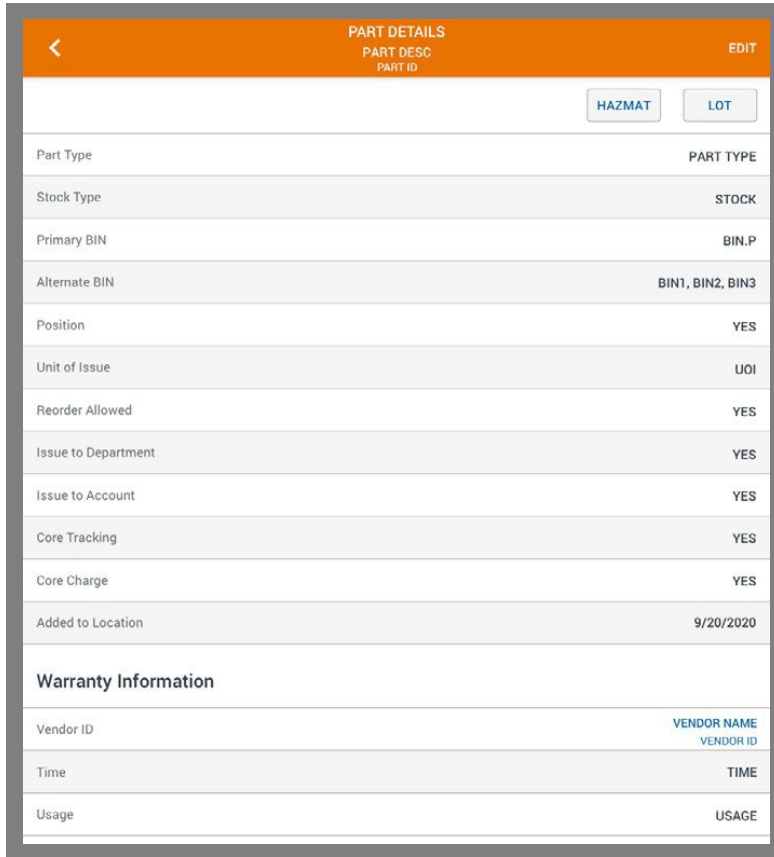
Part Notes

Part Notes allows for a Location or Part Manager to put information on a part for a Storekeeper to read when looking for more details. A notification will appear on the prior screen when notes are present.

The screenshot shows a mobile application interface for 'Part Notes'. At the top is an orange header bar with a white back arrow on the left and the text 'PART NOTES', 'PART DESC', and 'PART ID' on the right. Below the header, there are two sections. The first is 'Part Location Notes', which has a blue pencil icon to its right and a large, empty text input box containing the placeholder text 'THIS IS WHERE THE NOTES WOULD BE FOR THE PART LOCATION NOTES'. The second section is 'Part Master Notes', also with a blue pencil icon to its right and a large, empty text input box containing the placeholder text 'THIS IS WHERE THE NOTES WOULD BE FOR THE PART MASTER NOTES'.

Part Information

Part Details shows information about the part such as Part Type, Unit of Measure, Manufacturer, and Warranty information. Based on the Storekeeper's settings, they will be able to edit the part details.



| PART DETAILS | |
|-----------------------------|--------------------------|
| PART DESC | |
| PART ID | |
| | HAZMAT LOT |
| Part Type | PART TYPE |
| Stock Type | STOCK |
| Primary BIN | BIN.P |
| Alternate BIN | BIN1, BIN2, BIN3 |
| Position | YES |
| Unit of Issue | UOI |
| Reorder Allowed | YES |
| Issue to Department | YES |
| Issue to Account | YES |
| Core Tracking | YES |
| Core Charge | YES |
| Added to Location | 9/20/2020 |
| Warranty Information | |
| Vendor ID | VENDOR NAME VENDOR ID |
| Time | TIME |
| Usage | USAGE |

Stock Locations

This view will show all locations that the part is stocked based on the Storekeeper's location and location group. Tapping the vendor name will open a side panel with more information about that vendor.

| STOCK LOCATIONS | | | | | |
|----------------------|--------|---------------|------------|--------------------------|-------------------------|
| PART DESC PART ID | | | | | |
| Search | | | | | |
| Location | Bin ID | Qty Available | Unit Price | Preferred Vendor | Pricing Source |
| LOC DESC LOC ID | BIN | 0000 | \$000.00 | VENDOR DESC VENDOR ID | CONTRACT CONTRACT ID |
| LOC DESC LOC ID | BIN | 0000 | \$000.00 | VENDOR NAME VENDOR ID | LAST RECEIPT PO ID |
| LOC DESC LOC ID | BIN | 0000 | \$000.00 | VENDOR NAME VENDOR ID | LAST RECEIPT PO ID |
| LOC DESC LOC ID | BIN | 0000 | \$000.00 | VENDOR NAME VENDOR ID | LAST RECEIPT PO ID |



Cross References

This view captures any cross references that exist for the part. If the Storekeeper has access, they can deactivate/activate/add cross references.

| CROSS REFERENCES | | | | |
|-------------------------------------|-------------------------|----------------------|--------------------------------------|-----------|
| PART DESC PART ID | | | | |
| Active | Cross Reference Part ID | Cross Reference Type | Cross Reference Type Detail | Last Used |
| <input checked="" type="checkbox"/> | XREF-12345 | VENDOR | VENDOR DESC VENDOR ID | 9/20/2020 |
| <input checked="" type="checkbox"/> | XREF-12345 | MANUFACTURER | MANUFACTURER DESC MANUFACTURER ID | 9/20/2020 |
| <input checked="" type="checkbox"/> | XREF-12345 | USER | | 9/20/2020 |
| <input type="checkbox"/> | XREF-12345 | BARCODE | | 9/20/2020 |
| <input type="checkbox"/> | XREF-12345 | EQUIVALANT | PART DESC PART ID | 9/20/2020 |
| <input type="checkbox"/> | XREF-12345 | ALIAS | | 9/20/2020 |

Purchase Orders

Any purchase order that the part is on will show up in this table which is sorted by the receipt date by default. If there is a PO it will show the status and allow the Storekeeper to view the PO. The Vendor information is also accessible from this table.

| PURCHASE ORDERS | | | | | | |
|----------------------|--|--------------------------|-------------|--------------|---------------|------|
| PART DESC PART ID | | | | | | |
| Search | | | | | | |
| Receipt Date | Purchase Order ID | Vendor | Qty Ordered | Qty Received | Receipt Price | UOM |
| 9/20/2020 |  PO-24343 STATUS | VENDOR DESC VENDOR ID | 0000 | 0000 | \$000.00 | PACK |
| 9/20/2020 | PO-24343 STATUS | VENDOR DESC VENDOR ID | 0000 | 0000 | \$000.00 | PACK |
| 9/20/2020 |  PO-24343 STATUS | VENDOR DESC VENDOR ID | 0000 | 0000 | \$000.00 | PACK |
| 9/20/2020 | PO-24343 STATUS | VENDOR DESC VENDOR ID | 0000 | 0000 | \$000.00 | PACK |

Vendors

This table will show the preferred vendors for the part and is sorted by last receipt date. The order price, vendor details, cross references and comments can be found on the table as well. The Storekeeper based on rights can also Add or Request to have a Vendor added. Vendor information is also accessible from this table.

| VENDORS | | | | | |
|----------------------|-------------|--------------------------|------------------|--------------|----------------------------------|
| PART DESC PART ID | | | | | |
| REQUEST ADD | | | | | |
| Last Received | Order Price | Vendor | Vendor Type (M5) | Vendor X-Ref | Comments |
| 9/20/2020 | \$000.00 | VENDOR DESC VENDOR ID | PRIMARY | PART ID | THIS VENDOR SHIPS EVERY THURSDAY |
| 9/20/2020 | \$000.00 | VENDOR DESC VENDOR ID | ALTERNATIVE | PART ID | THIS VENDOR SHIPS EVERY THURSDAY |
| 9/20/2020 | \$000.00 | VENDOR DESC VENDOR ID | | PART ID | THIS VENDOR SHIPS EVERY THURSDAY |
| 9/20/2020 | \$000.00 | VENDOR DESC VENDOR ID | | PART ID | THIS VENDOR SHIPS EVERY THURSDAY |

Transfers

The Transfers screen shows all the transfers for the part and sorted by request date. The Storekeeper can see the status of a transfer as well as the locations from its origin and destination. If the reason is a Work Order or an Asset, the Storekeeper will be able to follow a link for more information.

| TRANSFERS | | | | | |
|----------------------|--------|------------|--------------------|--------------------|--------------------------|
| PART DESC PART ID | | | | | |
| Search | | | | | |
| Req Date | Req by | Status | From | To | Reason |
| 9/10/2020 | EMP ID | SHORT | LOC DESC LOC ID | LOC DESC LOC ID | STOCK |
| 9/10/2020 | EMP ID | COMPLETE | LOC DESC LOC ID | LOC DESC LOC ID | ASSET ID |
| 9/10/2020 | EMP ID | IN TRANSIT | LOC DESC LOC ID | LOC DESC LOC ID | WO ID |
| 9/10/2020 | EMP ID | REQUEST | LOC DESC LOC ID | LOC DESC LOC ID | STOCK |

Issues

Any part issue for the part will show up in this table which is sorted by the issue date by default. From this table the Storekeeper can view the Asset Details and the Work Order it was issued to as well as position and failure code if required.

| ISSUES | | | | | |
|----------------------|--|----------------------------------|----------------------|--------------------|--------------------------|
| PART DESC PART ID | | | | | |
| Search | | | | | |
| Issue Date | Asset | Work Order | Task Code | Position | Failure Code |
| 9/20/2020 | ASSET DESC ASSET ID | WO DESC WO ID | TASK DESC TASK ID | POS DESC POS ID | FAILURE DESC FAULT ID |
| 9/20/2020 | ASSET DESC ASSET ID | WO DESC WO ID | TASK DESC TASK ID | POS DESC POS ID | FAULT DESC FAULT ID |
| 9/20/2020 | ASSET DESC ASSET ID | WO DESC WO ID | TASK DESC TASK ID | POS DESC POS ID | FAULT DESC FAULT ID |
| 9/20/2020 | ASSET DESC ASSET ID | WO DESC WO ID | TASK DESC TASK ID | POS DESC POS ID | FAULT DESC FAULT ID |

Serial Information

If the part is serialized the serial information for the part can be found on this screen. The parts are sorted by serial number and the Storekeeper can also see the status, vendor information, and when it was received. The tabs across the top of the view break these parts into what is in inventory, what is installed, and parts that could be in transfer.

| SERIAL INFORMATION | | | |
|----------------------|--------|--------------------------|--------------|
| PART DESC PART ID | | | |
| INVENTORY | | INSTALLED | IN TRANSFER |
| Serial # | Status | Vendor | Receipt Date |
| SERIAL ID | STATUS | VENDOR DESC VENDOR ID | 9/20/2020 |
| SERIAL ID | STATUS | VENDOR DESC VENDOR ID | 9/20/2020 |
| SERIAL ID | STATUS | VENDOR DESC VENDOR ID | 9/20/2020 |
| SERIAL ID | STATUS | VENDOR DESC VENDOR ID | 9/20/2020 |

Select Action

Actions will vary based on in the status of the Part Request. For example, if the request is Pending, the Part Request can be assigned, denied, or edited.

Just a description
327
✕

PARTS VIEWER
SELECT ACTION ▾

Part Details

| | |
|-----------------------|--------------------|
| Part | Just a description |
| Manufacturer Part Num | |
| Manufacturer | |
| Quantity | 1 |
| On Hand | 0 |
| Available | 0 |
| Unit Cost | |

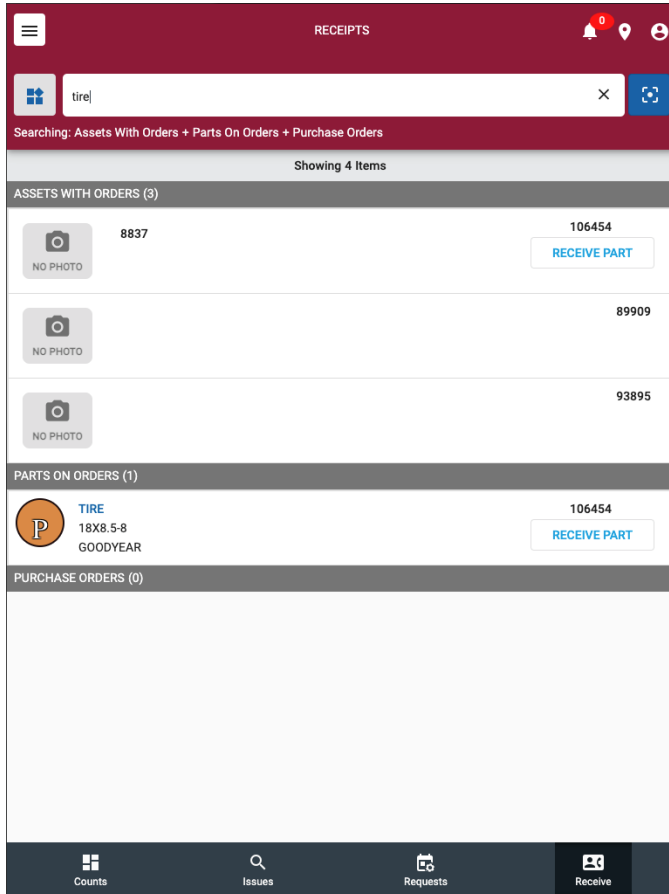
ASSIGN


 DENY

 EDIT

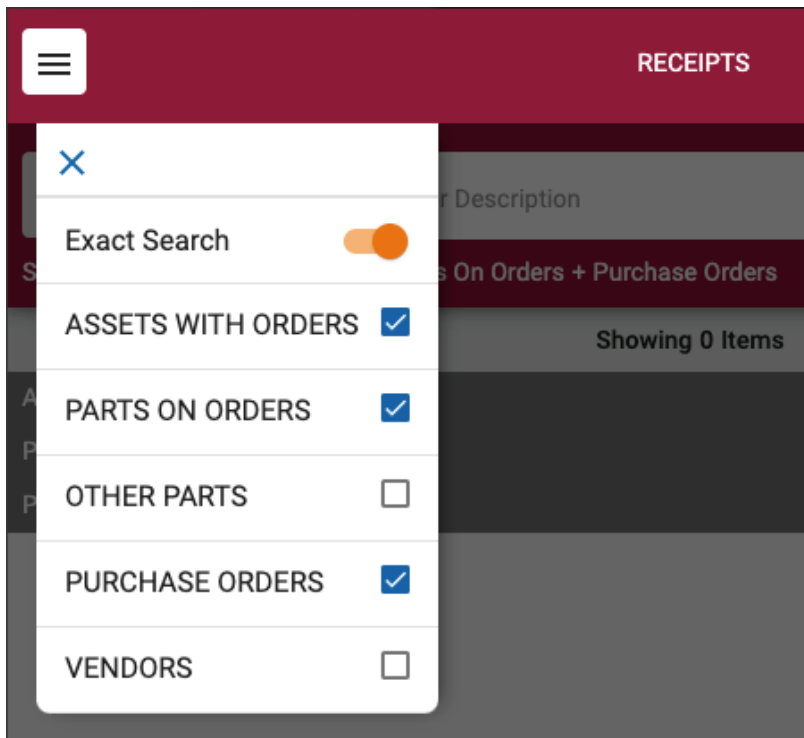
Part Receipts

When receiving a part, the Storekeeper can use the Receipts screen to either search for or scan a part to receive it. The items ready to be received will display a Receive Part button that will allow the Storekeeper to go to the PO and update the quantity received.



Tap the  icon to limit or expand what data is searched or filtered:

- **Exact Search** – Parts with an exact match are returned in the search results.
- **Assets with Orders** – Assets that match the search criteria that have parts on a PO and that have not yet been received.
- **Parts on Orders** – Parts that match the search criteria that are on a PO and that have not yet been received.
- **Other Parts** – Parts that match the search criteria that are not on a PO.
- **Purchase Orders** – Open Purchase Orders that match the search criteria.
- **Vendors** – Vendors that match the search criteria.



Purchase Order Details

Tapping the Receive Part button opens the Purchase Order. If the Receive Part button was on a part, the part will be selected when the Purchase Order is opened. On the Purchase Order, the Storekeeper can select multiple rows from the table and tap the Receive button to receive them. The Storekeeper can also update the quantity received on each line before tapping Receive. The tabs across the top will show more information about the Purchase Order and allow the Storekeeper to add/view receipts.

PURCHASE ORDER DETAILS
106454

LINE ITEMS (4) PO DETAILS RECEIPTS (0)

Search

0 selected RECEIVE

OPENED (3) CLOSED (1) ALL

| Line # | Part No./Comment | Not Received | Ordered | Received | Vendor Part ID | Manuf Part ID |
|---------------------------------|------------------------------|---------------------------------|---------|----------|----------------|---------------|
| <input type="checkbox"/> Line 2 | REAR BRAKE PADS 106-09090 | <input type="text" value="10"/> | 10 | 0 | | |
| <input type="checkbox"/> Line 3 | WATER PUMP 1CH4792968 | <input type="text" value="4"/> | 4 | 0 | | |
| <input type="checkbox"/> Line 4 | TIRE 18X8.5-8 | <input type="text" value="2"/> | 2 | 0 | | |

Counts Issues Requests Receive

Part Receipts

Tapping the Line number opens a side panel with more information about the specific line. The Storekeeper can also access the Parts viewer from the side panel for more information about the part. See the [Parts Viewer section](#) for more details.

The screenshot displays the 'PURCHASE ORDER DETAILS' screen for PO 106454. The interface is divided into three main sections: 'LINE ITEMS (4)', 'PO DETAILS', and 'RECEIPTS (0)'. A search bar is located at the top left of the 'LINE ITEMS' section. Below it, there are sections for 'OPENED (3)' and 'CLOSED (1)'. A table lists the line items:

| Line # | Part No./Comment | Not Received |
|---------------------------------|------------------------------|--------------|
| <input type="checkbox"/> Line 2 | REAR BRAKE PADS 106-09090 | 10 |
| <input type="checkbox"/> Line 3 | WATER PUMP 1CH4792968 | 4 |
| <input type="checkbox"/> Line 4 | TIRE 18X8.5-8 | 2 |

A side panel for 'Line Item 2' is open on the right, featuring a 'PARTS VIEWER' button. Below this, the 'Order Details' section includes fields for Vendor, Ordered (10), Received, and Not Received (10), along with Date Ordered and Date Received Last. The 'Part Details' section provides the following information:

| | |
|----------------------|-----------------|
| Part Description | REAR BRAKE PADS |
| Part ID | 106-09090 |
| Vendor Part No | |
| Manufacturer ID | NAPA |
| Manufacturer Part No | |
| Unit Price | \$52.22 |

The bottom navigation bar contains icons for Counts, Issues, Requests, and Receive.

Taxes and Discounts

Once the Storekeeper has received one or multiple parts, taxes and discounts must be calculated:

| Line # | Part No / Comment | Tax | Discount | Serial Number |
|--------|------------------------------|-----|----------|---------------|
| LINE 2 | REAR BRAKE PADS 106-09090 | 0 % | 0 % | |

This information can be entered line by line or all at once by tapping the Tax / Discount fields and selecting Update All Line Items.

UPDATE TAX SCHEME
Update Information below

Tax Scheme

Tax Pct

UPDATE LINE ITEM

UPDATE ALL LINE ITEMS

CANCEL

APPLY DISCOUNT
Update Information below

0

UPDATE LINE ITEM

UPDATE ALL LINE ITEMS

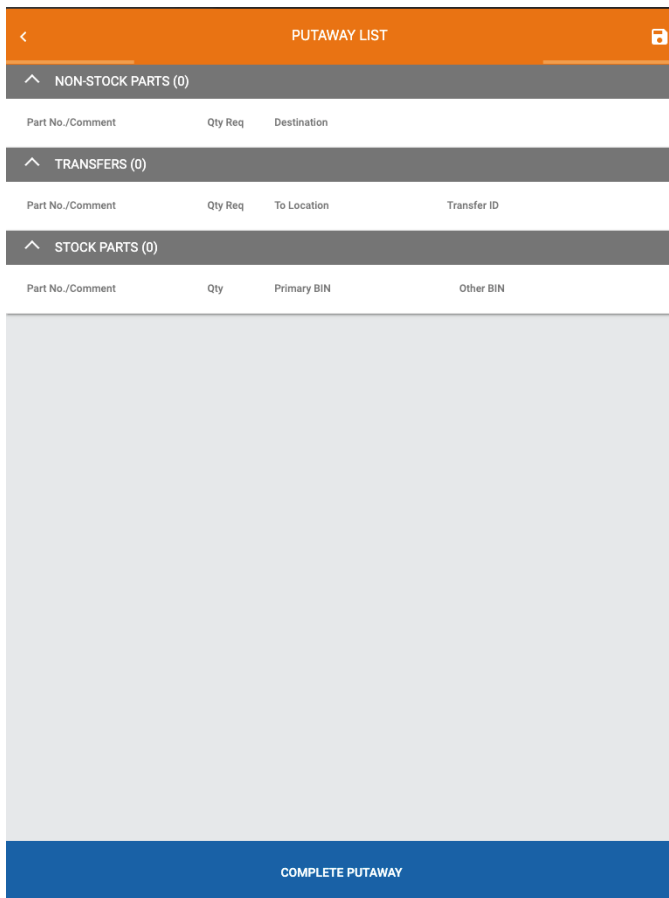
CANCEL

Putaway List

When the taxes and discounts are applied and saved, a Putaway List is generated. This will break the received parts into sections:

- **Non-Stock Parts** – These parts have a destination like a WO or Asset and can be issued from this screen.
- **Transfers** – These are parts that are to be transferred to another location.
- **Stock Parts** – This section will show a list that will allow the Storekeeper to check off parts that have been put away along with the primary and alternate BINs

If the Storekeeper has parts to receive on multiple POs, they can tap the icon in the upper right corner to save the list and return to it at a later date. Once the Storekeeper taps Complete Putaway, the list will no longer be saved because it has been completed.





FleetFocus EDGE for M5 – Technician User Guide

Version 23.0.x | April 2023

Copyright © 2023 AssetWorks Inc. its subsidiaries. All rights reserved.

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 e-mail, 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

E-mail: M5Support@AssetWorks.com

Web Site: Community.AssetWorks.com

The support web site 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 web site, contact Customer Support by calling the number above.

FleetFocus EDGE for M5 – Technician - User Guide

Version 23.0.x

April 2023

Contents

- Login 2**
 - Clock In..... 3
- Search 5**
 - Asset Details..... 7
 - Current and Pending Work 9
 - Work History 15
 - Create Work Order/Go To Work Order..... 16
- My Timecard 17**
 - Add Indirect Time..... 18
 - Timecard Details..... 19
 - Edit Timecard Details 20
- Home 21**
- Assigned Work..... 23**
 - Filtering and Sorting 25
 - Work Order Details 27
 - Add Job..... 28
 - Add Work Order Note 29
 - Complete..... 30
 - Edit Work Order Details 31
 - Take Photo..... 32
 - Work History 34
 - Job Details 36
 - Add Job Note 37
 - Issue Part..... 38
 - Request Part 41
 - Post Labor..... 43
 - Edit Job 43
 - Take Photo..... 43
 - Job Tests 44
 - Test Details 45
 - Working on a Test..... 47
 - Saving and Completing a Test..... 48
- Part Requests 49**

Login

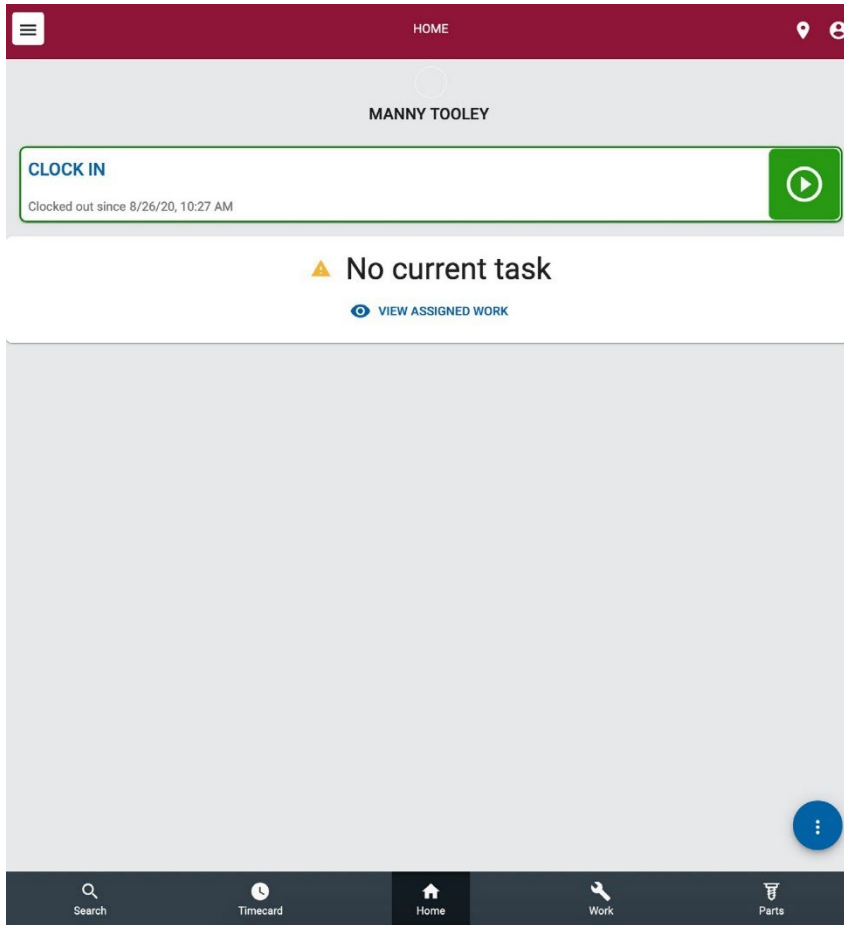
A Technician must log into their account by entering a username and password:



Login

Clock In

Once logged in, the Technician can clock in to begin working on Work Orders:



Clock In is an optional feature that can be enabled or disabled in the EDGE settings. When the feature is enabled, the Technician will be automatically clocked in when they start their first job.

Login

When they clock out for the day, the system will prompt them to update the Work Accomplished Code (WAC) or Job Status if they are on a Job. They will also have the opportunity to add comments:

CANCEL **Update Job Status**
518888

| | |
|------------|--------------------------|
| Job ID | Description |
| 08-067-001 | OVERHAUL BUCKET ASSEMBLY |

Job Status

Add Comments

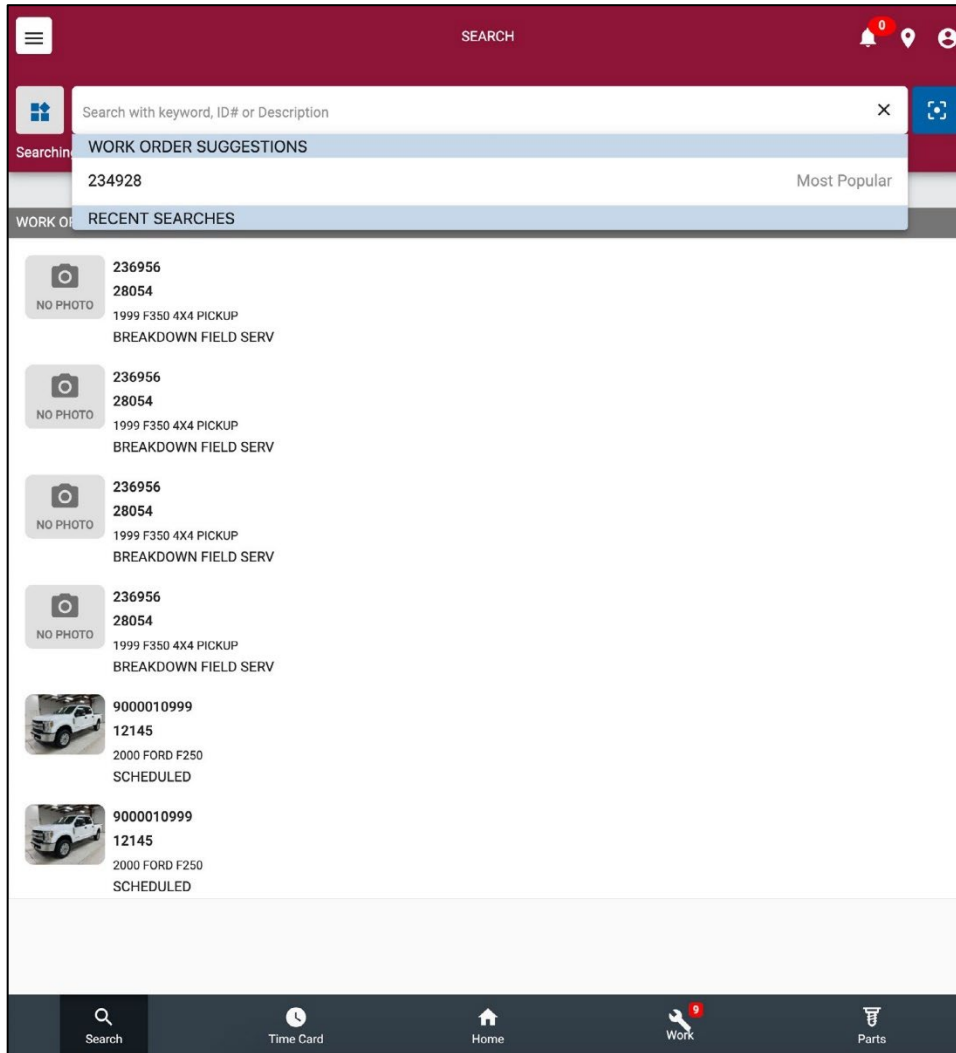
0 / 4000

| | |
|---------------|-------------------------------|
| Asset ID | Asset Description |
| 15005761 | SEASONAL AND APPT COLLECTIONS |
| Status ID | Status Description |
| WIP | WORK IN PROGRESS |
| Work Order ID | Title |
| 518888 | |

SAVE

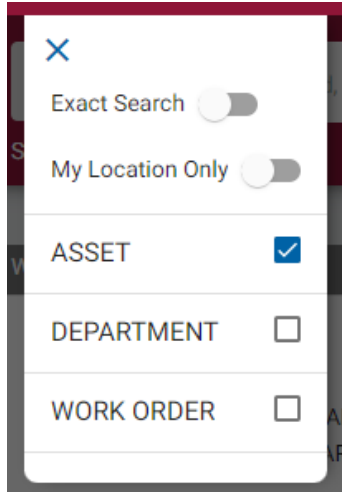
Search

The Search section uses several criteria to find an Asset, Department, or Work Order. Examples include Asset description or ID, license plate, department ID, department name, and Work Order ID.



Smart search shows suggested Work Orders based on the user's assigned work or recent searches. Search results that match the criteria entered will be displayed and the Technician can tap of the item to get more details.

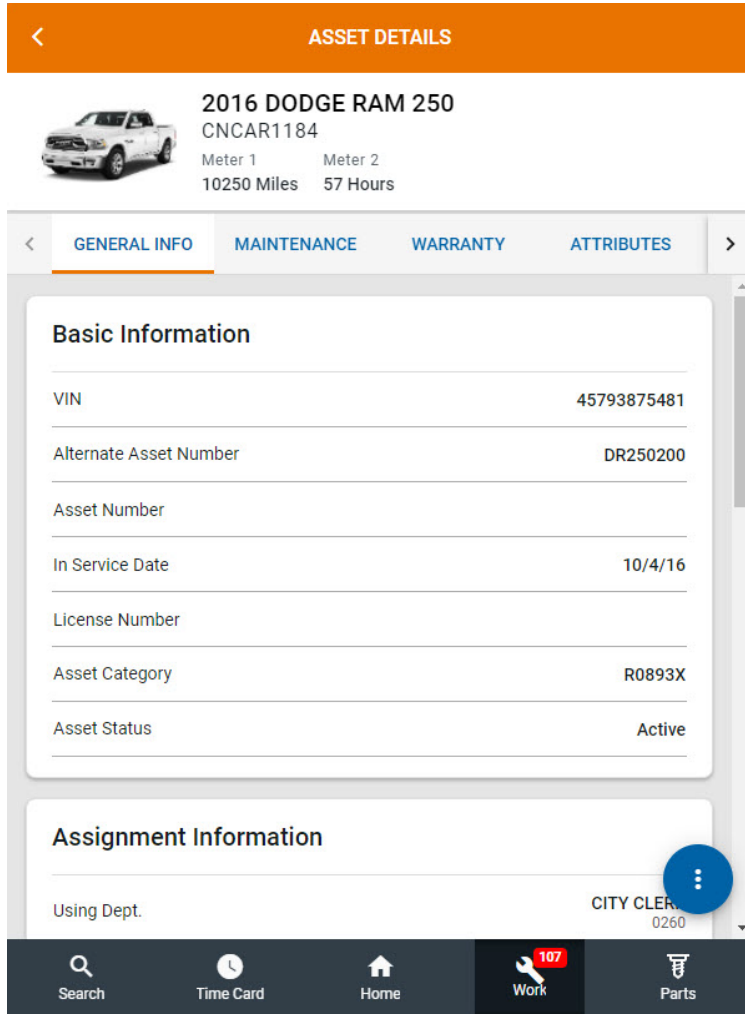
Tapping the  icon will display the following menu with additional search options:



- **Exact Search** - only returns results that directly match the user input.
- **My Location Only** - only returns results that are relative to the user's current location settings.
- The user can limit their search to Asset, Department, Work Order, or a combination by tapping the checkboxes.

Asset Details

Tapping an Asset from a search result (or a Work Order/Job) will display the Asset Details screen:



The Asset Details screen displays several tabs of information about the asset:

General Info

The General Info tab displays Basic Information (ex. VIN, Asset Number, License Number), Assignment Information (ex. Using and Owning Departments, Maintenance and Parking Locations), Codes, and Operator Information.



Maintenance

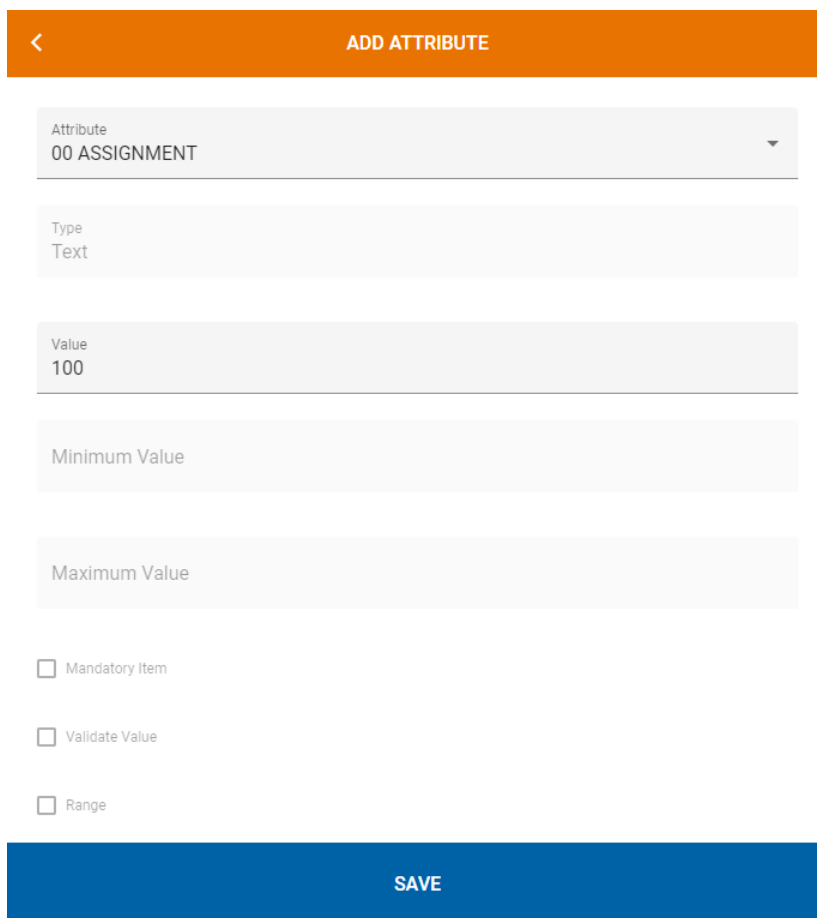
The Maintenance tab displays PM Service information and any Standard Job Schedules.

Warranty

The Warranty tab displays warranty information for the asset, component, and part, if applicable.

Attributes

The Attributes tab displays attributes assigned to the asset. Attribute values can be edited by tapping , and new attributes can be added by tapping . When adding a new attribute, the Add Attribute screen displays:



< ADD ATTRIBUTE

Attribute
00 ASSIGNMENT

Type
Text

Value
100

Minimum Value

Maximum Value

Mandatory Item

Validate Value

Range

SAVE


Select an attribute and fill in any required information about the attribute, which may include type, value (including minimum and maximum values), and whether the attribute is mandatory, requires validation, or is a range. When finished, tap **Save** to add the attribute to the asset.

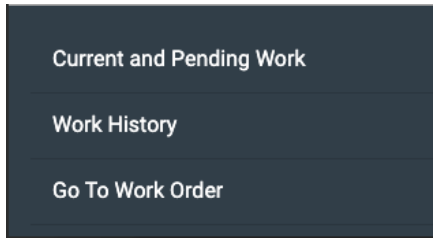
Notes

The Notes tab displays asset, work order, and customer notes.

Attachments

The Attachments tab displays any attachments uploaded for the asset.

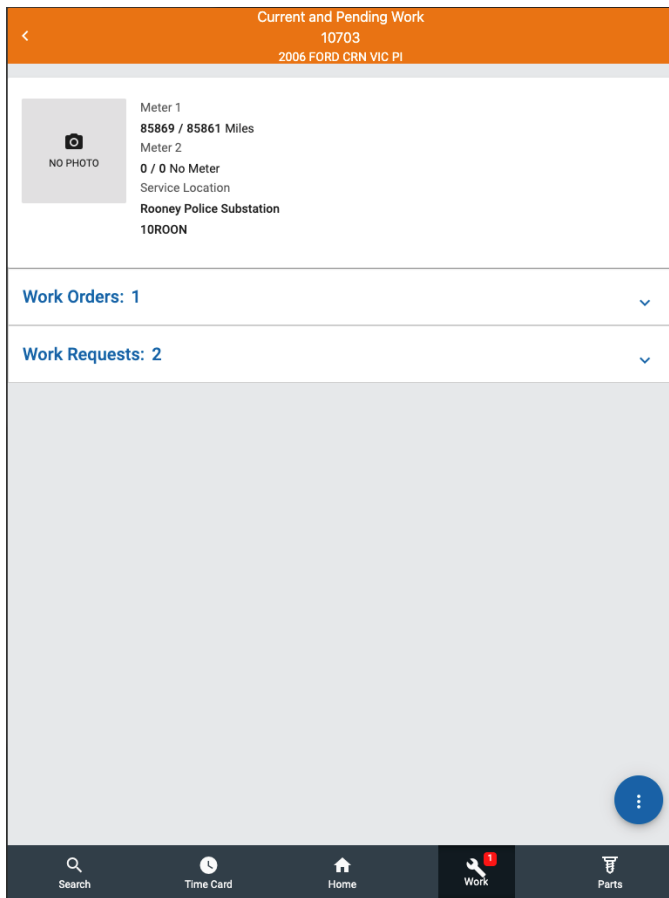
At the bottom right of the screen there is an Ellipsis icon  with additional options:




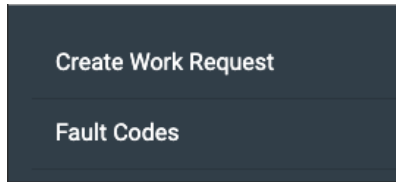
Each option is described below.


Current and Pending Work

The Current and Pending Work screen shows any open Work Orders and Work Requests for the Asset. The screen also shows meter readings, the Service Location, and an image if provided:



At the bottom right of the screen there is an Ellipsis icon  with additional options:




 If M5 is set to have only have one Work Order for an Asset at a location and there is an open Work Order, then the user will not be able to create a new Work Order. If there is no open Work Order or if the settings allow for multiple Work Orders, the Technician has the option to create a new Work Order. Other options include:

- **Create Work Request** - See the [Create Work Request](#) section.
- **Fault Codes** - Select Fault Codes to view any fault codes associated with the Asset.

Create Work Request

Select Create Work Request to create a new Work Request. The following screen will display:

CANCEL NEW WORK REQUEST

 2017 FORD INTERCEPTOR
12410

Incident ID

Entered Date

Entered By

Work Request ID

Basic Information

Shop Location *
10ROON ...

Job Code * ...

Repair Reason * ...

Complaint Comment
0 / 1000

Estimated Hours

Contact Information

Name

Phone Number

Email

Notes

0 / 1000

CREATE WORK REQUEST

Fill in the required fields and tap Create Work Request to create the request. The user can add a photo or attach a file using the Ellipsis icon .

Create Work Order

Select Create Work Order to create a new Work Order. The following screen will display:

CANCEL CREATE WORK ORDER
DETAILS

NO PHOTO 1978 FORD 3600
EQW743

Review Vehicle Alerts

System Messages
Unit/Department is normally maintained at location NORMM (NORMANDIE & COMPLEX MAINTENANCE's), and you are logged into 1075.

Job Type

Work Order Info

Repair Reason *

Current Meter 1
2877

New Meter 1

Current Meter 2
0

New Meter 2

Dates

DATE/TIME IN

Date 3/30/2021 Time 10:39

DATE/TIME DUE


Date Time

ADD JOBS

The user will see any system messages for the selected Asset/Department at the top of the screen. Under Work Order Info, select a Repair Reason and enter any additional information. When finished, tap **Add Jobs** to add a job to the Work Order:

Search

CANCEL **CREATE WORK ORDER**
ADD JOBS


NO PHOTO

2000 DODGE DAKOTA
11513

Work Order Jobs Total: 0

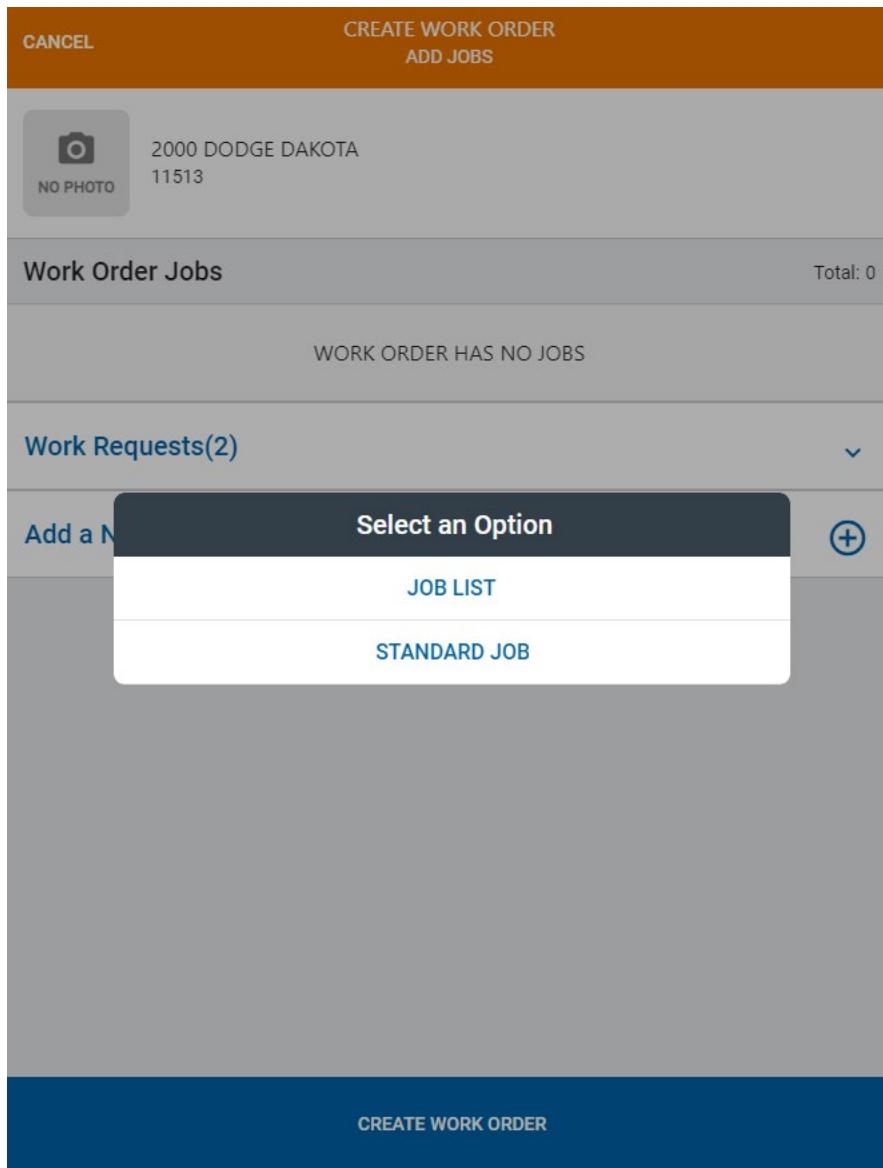
WORK ORDER HAS NO JOBS

Work Requests(2) ▼

Add a New Job ⊕

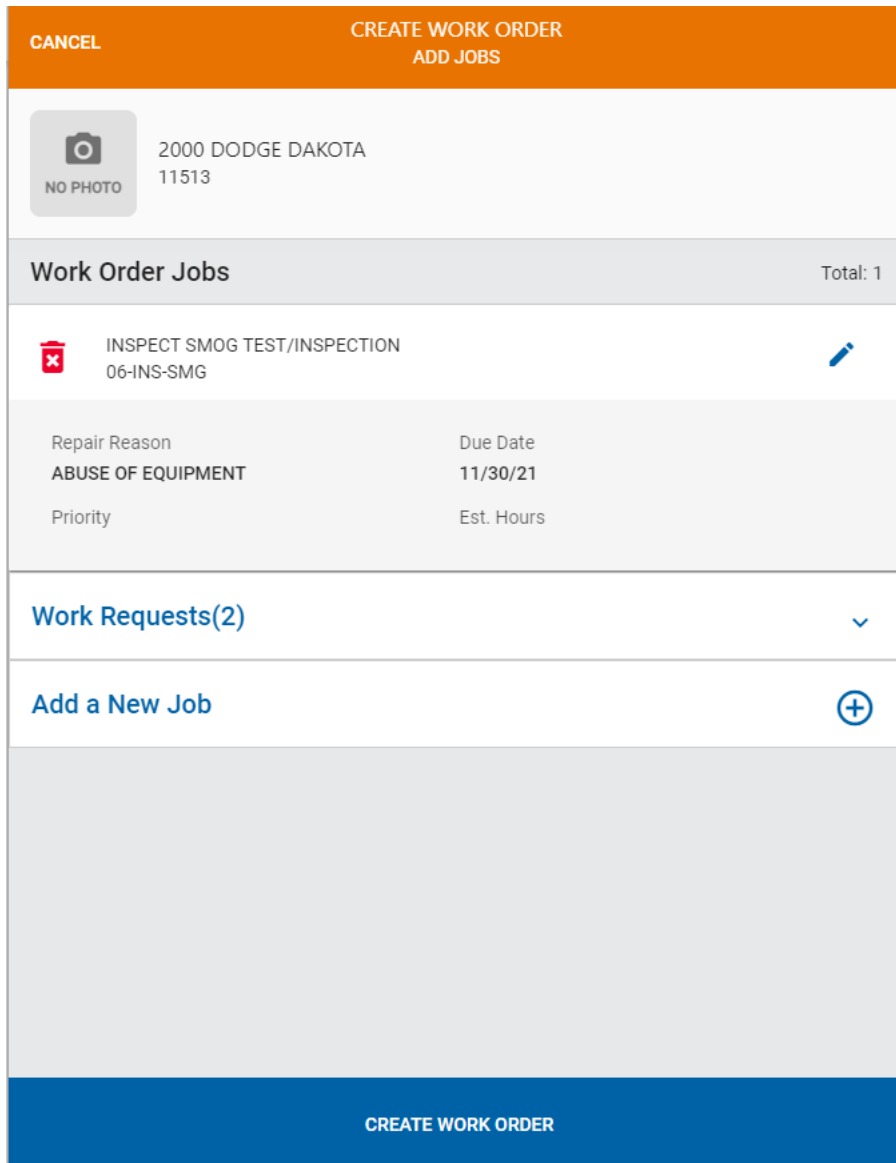
CREATE WORK ORDER

On the Add Jobs screen, jobs can be added based on a **Work Request** (this will not be displayed if no Work Requests exist), or to add a new job, tap **Add a New Job**. There are 2 options to select from:



- **Job List** - To select a job from a job list, the Technician will be prompted to select the work accomplished, the system, the assembly or component, and a job reason to add the job to the Work Order (this will be slightly different based on M5).
- **Standard Job** - The Technician can select any standard job and enter a job reason to add the job to the Work Order.

Once jobs are selected, they will appear in the Work Order Jobs area:



Jobs can be removed from the list by tapping the red trash can icon. When finished adding jobs, tap Create Work Order to create the Work Order. The Work Order will be assigned to the user who created it by default. After creating the Work Order the user will be taken to the Assigned Work view.

Work History

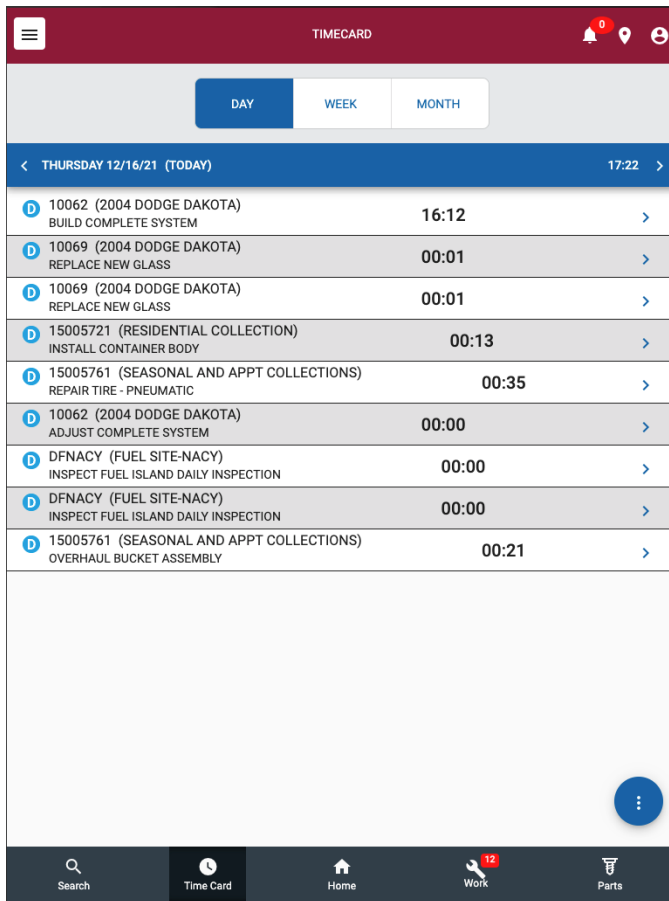
See the [Work History section](#) described in Work Order Details.

Create Work Order/Go To Work Order

If there is no an open Work Order for the Asset/Department **Create Work Order** will be displayed in the menu. Go to the [Create Work Order](#) section for more information. If there is an open Work Order, **Go To Work Order** will be displayed in the menu; this option will open [Work Order Details](#).

My Timecard

The Timecard section is where labor postings can be viewed and maintained:



Time entries can be viewed by day, week, or month and are listed according to Job name and ID as well as the time entered for each Job. The user can swipe left or right on a tablet to view different time spans. Tapping the right arrow next to an entry will display a Timecard Details screen with more information about the entry.

At the bottom right of the screen there is an Ellipsis icon  with an option to add indirect time.

Add Indirect Time

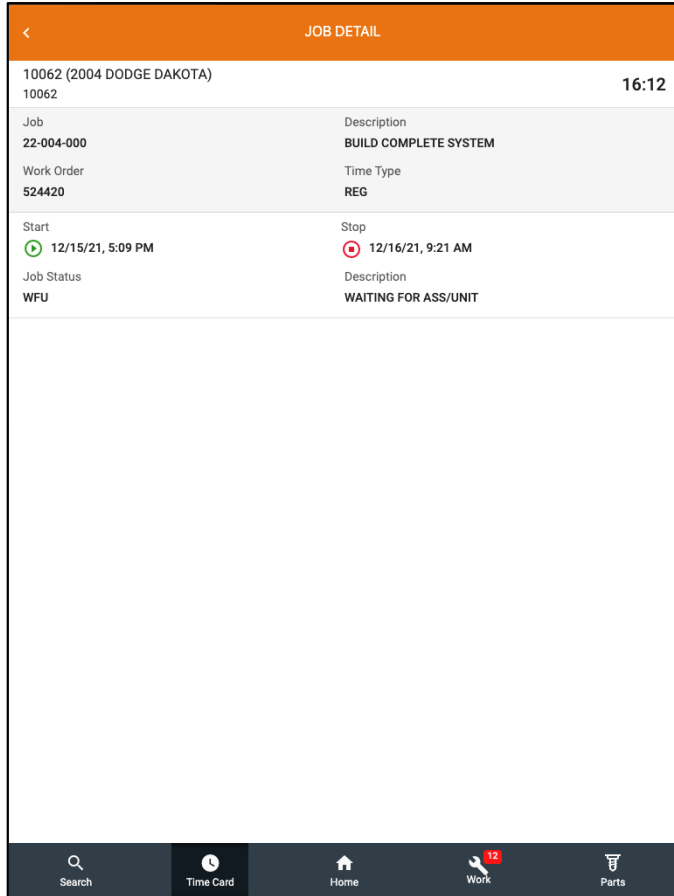
Select Add Indirect Time to add an indirect time entry. The following screen will display:

The screenshot shows a mobile application interface for adding indirect time. The top bar is orange and contains a 'CANCEL' button on the left and the title 'INDIRECT TIME' in the center. Below this is a dropdown menu labeled 'Indirect Job *'. The main content area is white and contains a section titled 'Start date & time' with a sub-label 'Start date'. This section includes three input fields: 'Start Date *' with the value '3/31/2021' and a calendar icon, 'Start Time' with the value '00:00', and 'Total Hours *'. Below these fields is a large, empty grey rectangular area. At the bottom of the form is a blue bar with the text 'SAVE'.

The following fields are required: Indirect Job, Start Date, and Total Hours. If the Start Time is known, that can be entered. When finished, select Save to save the time entry.

Timecard Details

Timecard Details displays additional information about the time entry, including the Job name, ID, Description, Start and Stop Times, and any comments:




The Technician can edit their labor posting by selecting the pencil icon on the top left of the screen:

Edit Timecard Details

In Edit mode, all fields on the time entry are editable and can be modified. Select Save once all changes are made. This is only available if the user has access.


CANCEL EDIT Labor REPAIR ENGINE MOUNTINGS 01-14-003


Start Date & Time

Start Date *
3/29/2021 

Total Hours *
3.68

Labor Details

Time Code *
REGULAR TIME 

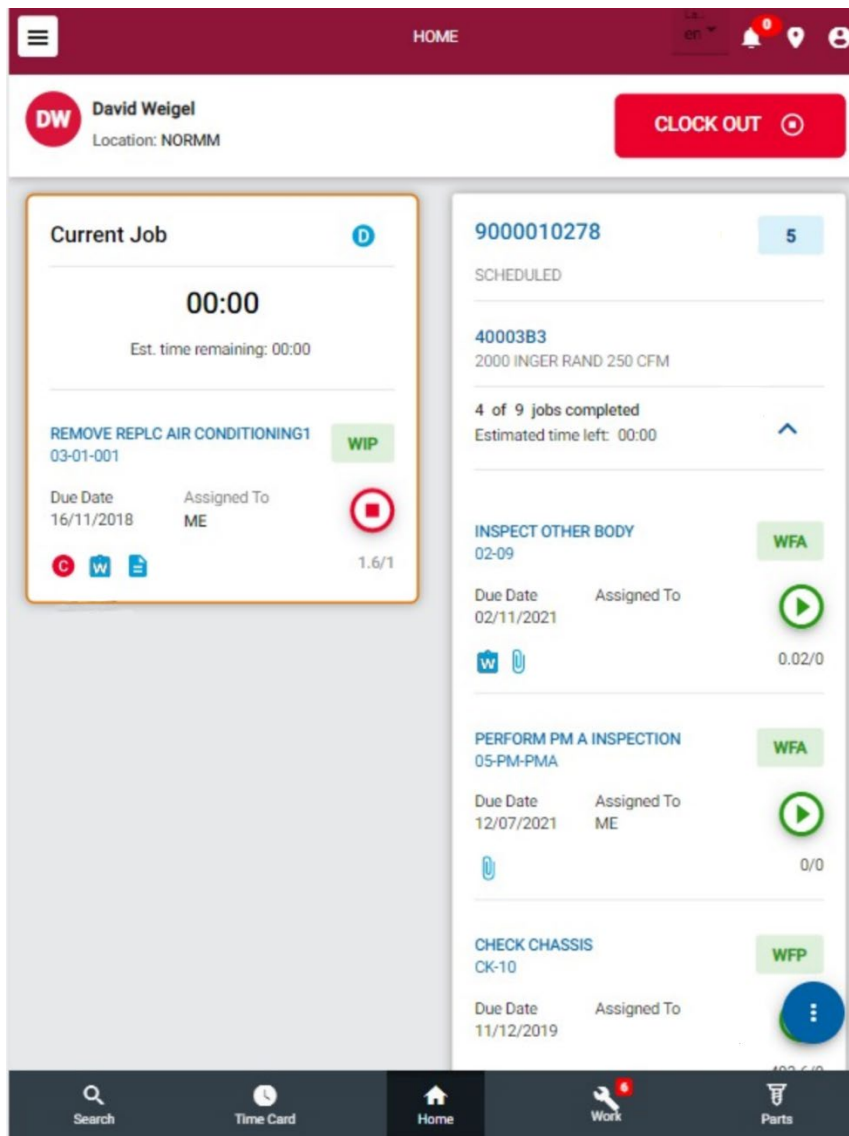
Pay Class/Step
4 / 40 

Add Notes

SAVE

Home

Once clocked in, the Technician will be taken to the Home screen:



The Home screen includes the following areas:

Name / Location - The top of the screen displays the user's name and location. The location is selected using the Location icon.

Clock In/Clock Out – If the feature is enabled, a button will appear and display the status on the Home page.

Current Job - If the user is on a Job, the number displayed is how long they have been on that job and if there is an estimate it will show the time left. **D** is for Direct and **I** is for Indirect. Other icons underneath the job give additional information:

-  Part ordered
-  Part cancelled
-  Part pending
-  Part ready
-  Warranty
-  Attachments
-  Notes
-  Test


Work Order – The right side of the Home page displays the Work Order Title, Number and Priority. This link will open [Work Order Details](#).

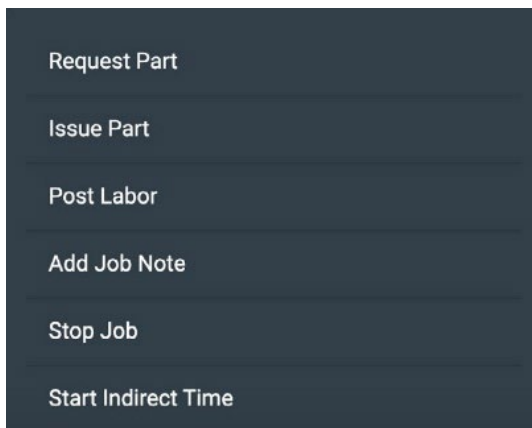
Start/Stop button – This will start/stop the current Job.


Asset Name / ID - Asset Name and ID. Link will open [Asset Details](#).

Job - Displays the Job Name and Number. This link will open [Job Details](#).

Bottom Navigation – Allows the user to quickly move through the app.

An Ellipsis icon  displays on the bottom right side of the screen with additional options. These options change depending what screen you are viewing. The Home screen has the following options:

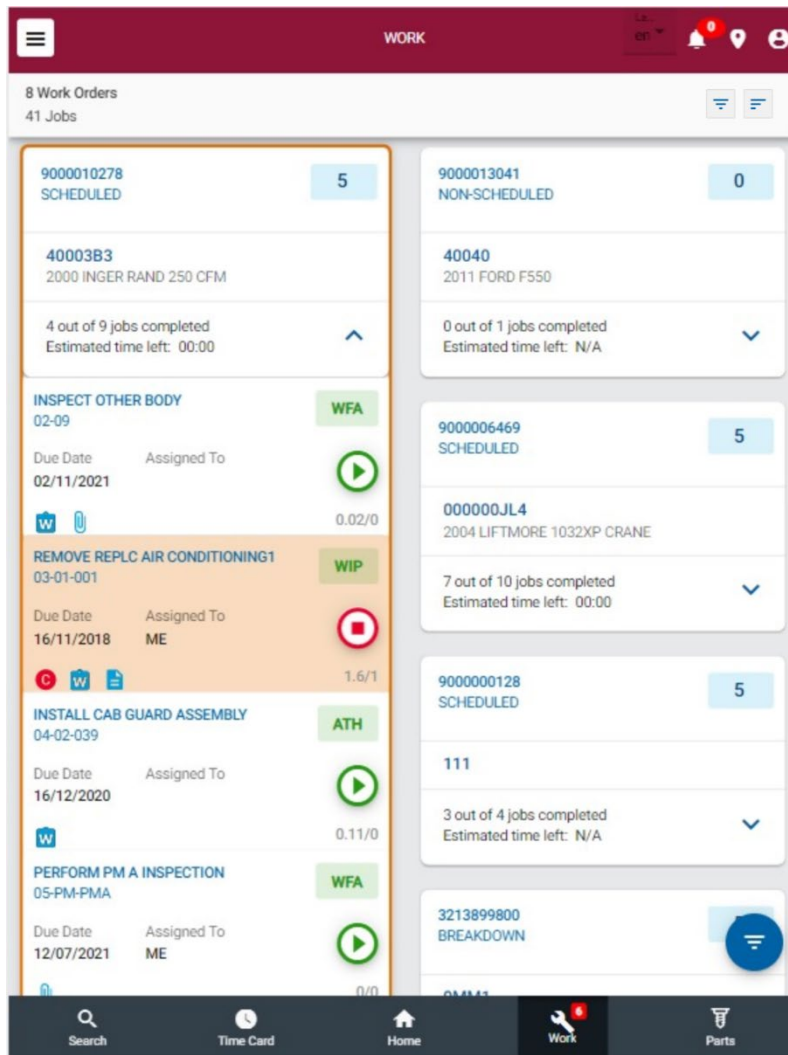


 These options will appear based on what capabilities the user has set in M5.

These options are described in the following sections of the document: [Request Part](#), [Issue Part](#), [Post Labor](#), [Add Job Note](#), Stop Job (selecting this will stop the job the Technician is working on), [Start Indirect Time](#).

Assigned Work

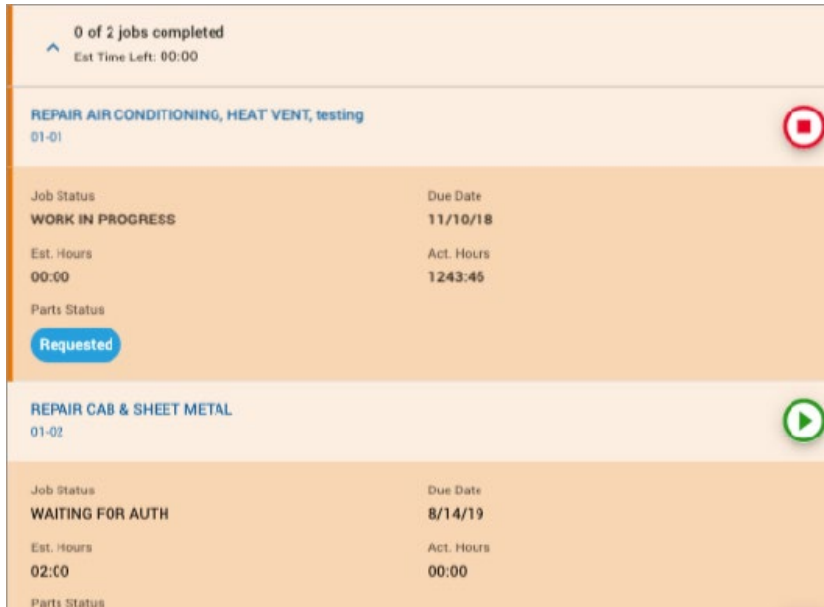
The Work section shows any Work Orders and Jobs that have been assigned to the Technician:



The top of the screen shows the number of assigned Work Orders/Jobs and if any [filters or sorts](#) have been applied.

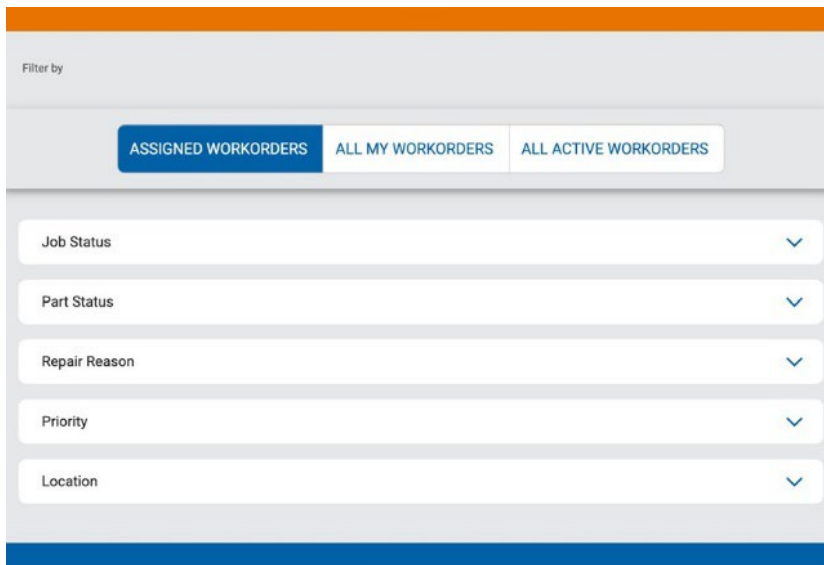
The highlighted section is the Work Order Card – this is what the Technician is currently working on. Tapping the Work Order ID will open the [Work Order Details](#) and tapping the right arrow will open [Asset Details](#). One Work Order may have multiple Jobs/ associated with it (i.e. 1 of 2 jobs completed) – tap the down arrow to view all Jobs on the Work Order:

Assigned Work



The Job the Technician is currently working on will have a status of “Work in Progress.” To stop working on a job, tap the red Stop button; however, if using Real-Time labor, the Technician can tap the green Play button to start a new job without stopping the current Job. The Technician will be prompted to update the WAC or Job Status before moving onto the new Job.

The bottom right of the Work screen displays a Filter button where the Technician can refine the list of assigned Work Orders, all their Work Orders, or all Active Work Orders, as well as additional filters to view by job status, part status, priority, etc.





Assigned Work Orders – Only Work Orders/Jobs that have been assigned to the Technician will appear.

All My Work Orders – Any Job that the Technician has worked on and not completed will appear.

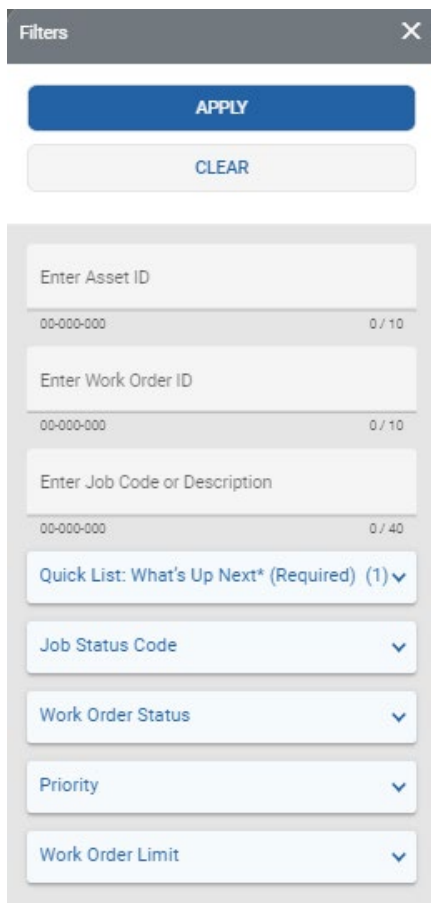
All Active Work Orders – This will show all active Work Orders at the Technician's current location.

All other filters are dynamic and will only show information that can be filtered based on the list of Work Orders in Assigned Work.

Filtering and Sorting

The top right corner has two buttons for filtering  and sorting  the data that displays on the Work screen. When data is filtered or sorted, the information is saved for each user. When a user logs out and logs back in, the last used filter or sort is applied to the data on the screen.

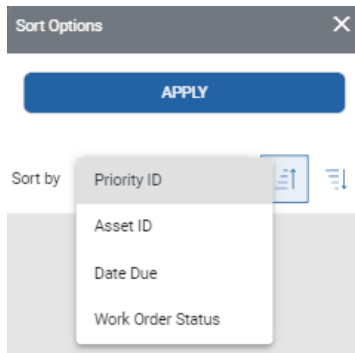
Tap the filter button to display a side panel with filtering options:



Data can be filtered by exact Asset ID, Work Order ID, Job Code or Description. Other filters include Quick List options, Job Status Code, Work Order Status, Priority, and Work Order Limit.

Assigned Work

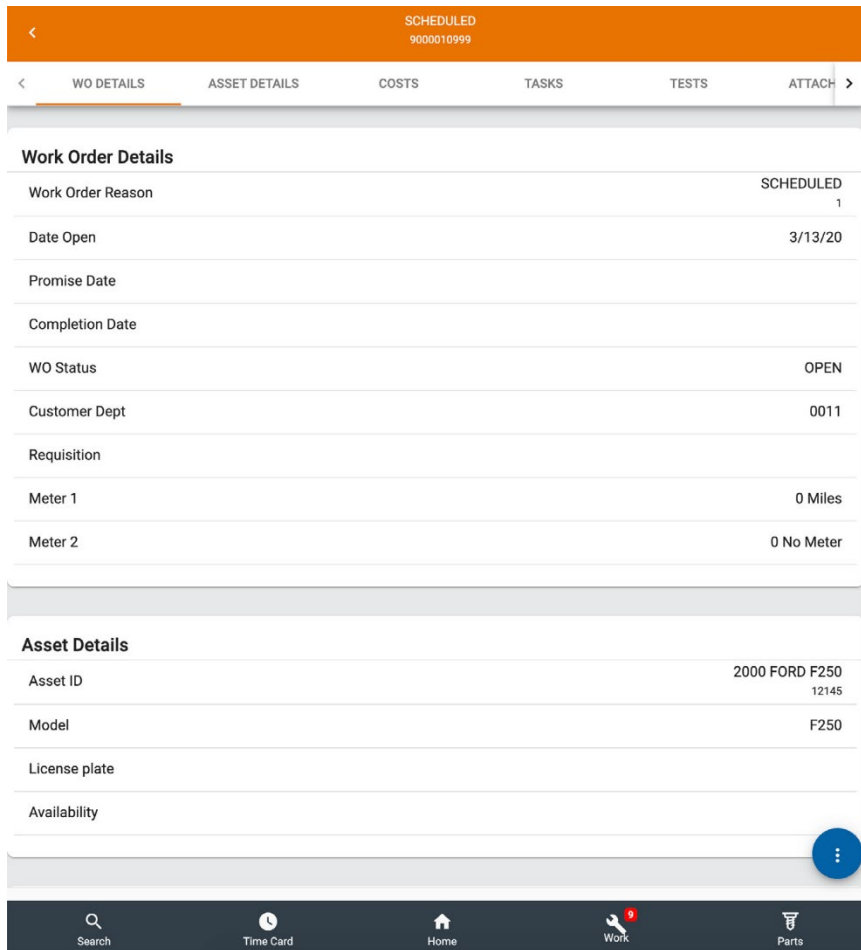
Tap the sorting button to display a side panel with sorting options:




Data can be sorted by Priority ID, Asset ID, Date Due, or Work Order Status, in ascending or descending order.

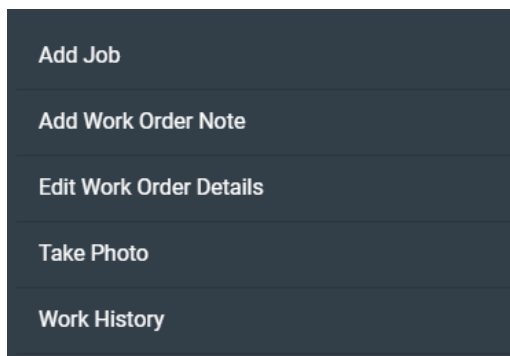
Work Order Details

Selecting a Work Order ID will open a Work Order Details page:



This page displays more detail about the Work Order and is split into several different tabs. The Technician can scroll through the pages or tap the sections in the top bar. Using these links will quickly allow the Technician to navigate to the corresponding section on the page.

At the bottom right of the screen there is an Ellipsis icon  with additional options:





These options can be modified through User Roles settings in M5.

Each option is described below.

Add Job

Select Add Job to add a job to a Work Order. There are 4 options to select from: Job List, Standard Jobs, Enter Whole Job Code, and Work Requests.

- **Job List** - To select a job from a job list, the Technician will be prompted to select the work accomplished, the system, the assembly or component, and a job reason.
- **Standard Jobs** - Standard Jobs allows the Technician to select any standard job and enter a job reason to add the job to the Work Order.
- **Enter Whole Job Code** – Enter Whole Job Code allows the Technical to entire an entire job code at once with a keyboard or scanner.
- **Work Requests** - A Work Request can be added to a Work Order by tapping the plus sign icon next to the Work Request, then tapping Add To Work Order. Work Requests will only appear if there are Work Requests for the Asset/Department.

Add Work Order Note

Select Add Work Order Note to add a note to the Work Order. For M5 users, there are two choices when adding a note: Locked, which means the note cannot be edited once added, or Exception, which is required when a WO/Job/Request has exceeded its standard rates/charges.

CANCEL ADD NOTE

Note *

0 / 4000

Locked

Exception

SAVE

Complete

Select Complete to finish a Work Order by entering a date and time the work was completed. This is only available once all jobs have been updated to a DONE status.

CANCEL Complete Work Order 3213899676

DATE/TIME WORK COMPLETED

Date* 3/31/2021  Time 10:20

COMPLETE

Edit Work Order Details

Select Edit Work Order Details to edit certain Work Order Information like the date and time due:

< EDIT WORK ORDER DETAILS

WORK ORDER DETAILS

Date Open
11/10/2021

Date Due
11/12/2021

Time Due
09:24

Work Finished ...

Work Finished Time

Work Order Status
OPEN

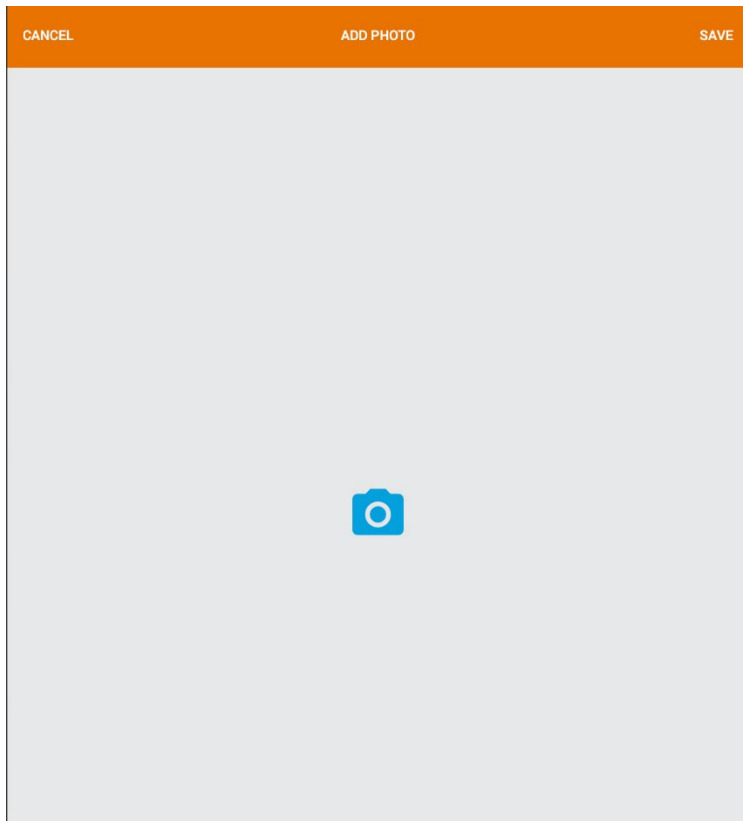
99000

0

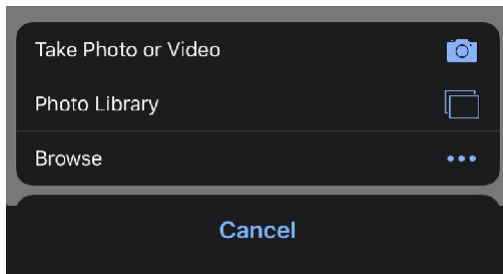
SAVE

Take Photo

Select Take Photo to take a photo of an item. The following screen will display:

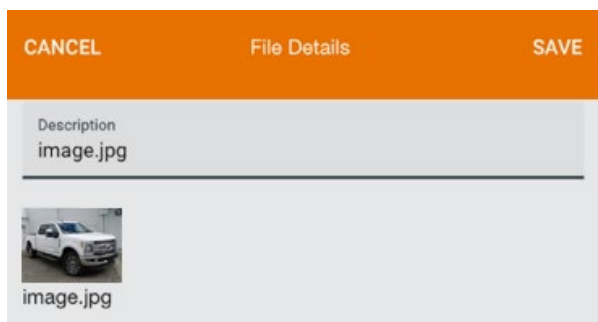
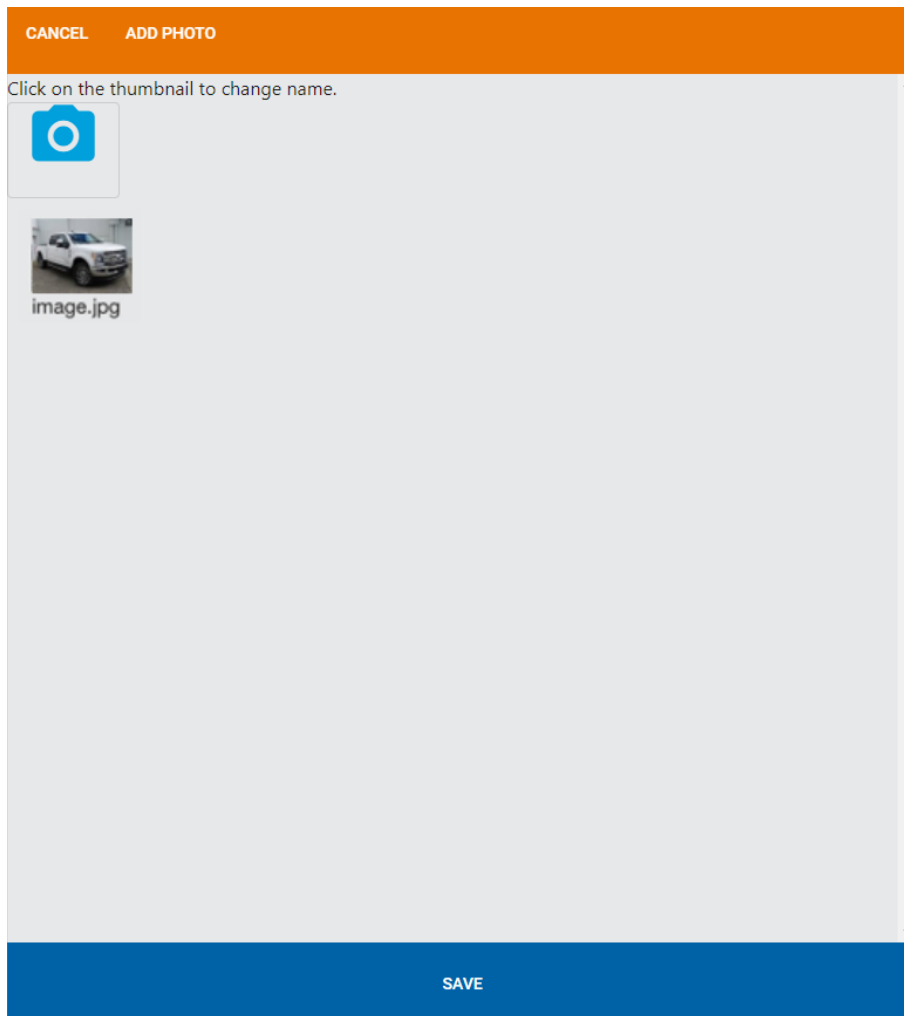


Tap the camera icon to access the photo menu:



Options are to take a photo or video, select a photo from the device's photo library, or browse for a photo. Once a photo is selected, the photo name can be updated by tapping the thumbnail and typing a new name in the Description area:

Assigned Work



Work History

Work History shows all Jobs that have been completed over the life of the Asset over a specified timeframe:

The screenshot shows a mobile application interface for 'Work History'. At the top, there is an orange header with a back arrow and the text 'Work History'. Below the header is a grey box with a camera icon and the text 'NO PHOTO'. The main content area is a list of jobs. The first job is 'HAZ FEE FLEET ASSET COMPLETE UNIT HF-999' with a 'VIEW >' button. Below it is a table with two columns: 'Repair Reason' and 'Complete Date'. The row shows 'SHOP CHARGE' and '7/20/21'. The second job is 'REPLACE NEW EMISSION CONTROLS 03-043-001' with a 'VIEW >' button. Below it is a table with two columns: 'Repair Reason' and 'Complete Date'. The row shows 'OPERATOR REPORT' and '6/30/21'. The third job is 'REPLACE NEW EMISSION CONTROLS 03-043-001' with a 'VIEW >' button. Below it is a table with two columns: 'Repair Reason' and 'Complete Date'. The row shows 'BREAKDOWN ROADCALL' and '4/25/21'. The fourth job is 'INSPECT POWER PLANT 06-045' with a 'VIEW' button and a blue circular menu icon. Below it is a table with two columns: 'Repair Reason' and 'Complete Date'. At the bottom, there is a dark navigation bar with five icons: Search, Tim ard, Home, Work (with a red '10' notification badge), and Parts.

| Repair Reason | Complete Date |
|--------------------|---------------|
| SHOP CHARGE | 7/20/21 |
| OPERATOR REPORT | 6/30/21 |
| BREAKDOWN ROADCALL | 4/25/21 |

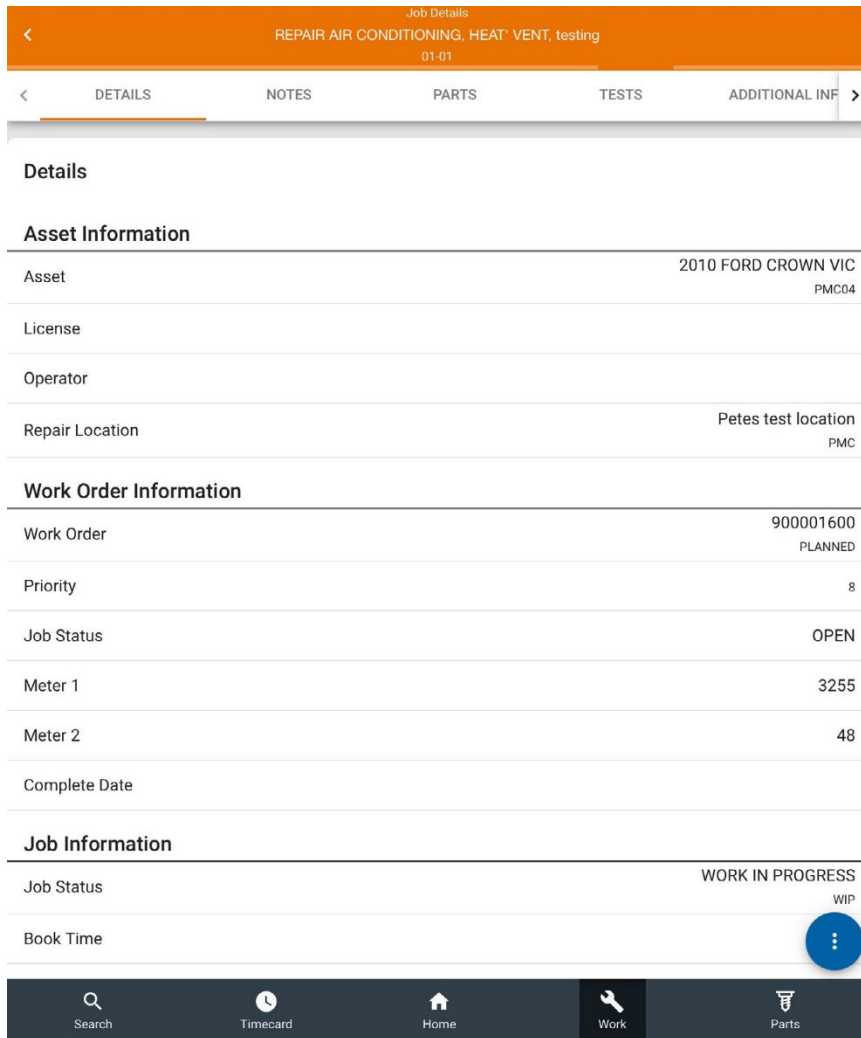
Assigned Work

The Filter button on the right side of the screen displays a Filter page where the data can be filtered by Time Span, System-Assembly, or Repair Reason:


The screenshot shows a mobile application interface for filtering data. At the top, there is an orange header bar with three buttons: 'CANCEL' on the left, 'FILTERS' in the center, and 'RESET' on the right. Below the header, the main content area is light gray and contains a 'Filter by' section. This section has three dropdown menus. The first dropdown, 'Time Span', is expanded to show five options: 'Last 7 Days', 'Last 30 Days', 'Last 3 Months', 'Last 12 Months (default)' (which has a blue checkmark), and 'All History'. The second dropdown is 'System-Assembly' and the third is 'Repair Reason'. At the bottom of the screen, there is a solid blue bar with the text 'APPLY FILTER' in white capital letters.

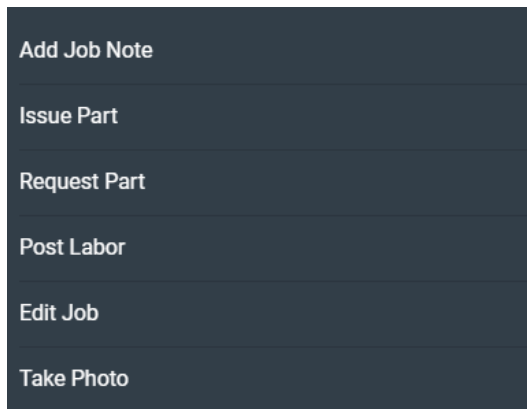
Job Details

Selecting a Job ID will open a Job Details page:



This page displays more detail about the Job in several different sections: Details, Notes, Parts, Tests, Additional Information, and Attachments. The user can scroll the page or tap the sections in the top bar. Using these links will quickly navigate the user to the corresponding section on the page.

At the bottom right of the screen there is an Ellipsis icon  with additional options:



These options can be modified through User Roles settings in M5.

Each option is described below.

Add Job Note

Select Add Note to add a note to the Job. See the [Add Note section](#) described in Work Order Details – Additional Options.

Issue Part

Select Issue Part to open a new screen to issue a part:

The screenshot shows the 'ISSUE PART' screen. At the top, there is an orange header bar with 'CANCEL' on the left, 'ISSUE PART' in the center, and a shopping cart icon on the right. Below the header, the 'Job' is 'BUILD COMPLETE SYSTEM 22-004-000' and the 'Part Location' is 'Rooney Police Substation 10R00N'. There are three tabs: 'PART INFO' (selected), 'STANDARD PARTS', and 'RESERVES (0)'. The 'PART LOOKUP' section has a 'Part ID' input field with a blue ellipsis icon to its right, a 'Part Description' input field, and a 'Quantity *' input field with the value '1'. Below these are 'On Hand' and 'Available' buttons. At the bottom is a blue 'ADD TO CART' button.



Based on the user's settings, the Technician may see a view to select the location the part is being issued from.

The screen defaults to Part Info to search for a part. Parts can be searched by Part ID or tap the ellipsis icon to the right of the field to search by description, Part ID, cross-reference, or BIN.

Assigned Work

If there are **Standard Parts** for the Job, a number greater than 0 will display and you can select the appropriate part to add to the Part Cart. Standard Parts displays parts that are most associated or used with a specific Asset. **Reserves** will be available if there are reserved parts for the Asset. The user will only be able to select parts that have an available quantity.

The screenshot displays a software interface for selecting parts. At the top, there is an orange 'CANCEL' button. Below it, the job details are shown: 'Job: INSPECT TIRE - PNEUMATIC 06-017-001' and 'Part Location: Rooney Police Substation 10ROON'. A navigation bar contains three tabs: 'PART INFO', 'STANDARD PARTS' (which is selected and highlighted in blue), and 'RESERVES (0)'. Below the tabs, there are three filter buttons: 'PRE-DEFINED (0)', 'ASSET (0)', and 'SPEC (3)'. The main area lists three parts with their respective usage percentages:

| Part Name | Quantity | Avl | Unit Cost | Percentage |
|------------------------------|----------|------|-----------|------------|
| SUPPLIES MISC. | 1 | 2551 | \$3.92 | 57% |
| BATTERY OPTIMA, YELLOW D750U | 1 | 0 | \$176.05 | 14% |
| TIRE WASTE FEE TIR600 | 1 | 0 | \$1.95 | 14% |

At the bottom of the interface is a blue 'ADD TO CART' button.

- **Pre-defined** – Displays parts that have been pre-defined for this job. The percentage will vary based on how many times the part has been used for this job.
- **Asset** – Displays parts that have been used on this Asset for the job. The percentage will vary based on how many times the part has been used on this Asset for the job.
- **Spec** - Displays parts that have been used for Assets that share the same Tech Spec for the job. The percentage will vary based on how many times the part has been used for this job and the Asset's that within the same Tech Spec.

Once a part is selected, the On Hand and Available fields will be populated.

Enter the quantity to be issued. Under Part Details, select a Position Code and a Failure Code.

Select Add to Cart to add the part to the Part Cart.

Assigned Work

In the Part Cart view, you can edit the part being issued, remove a part, or add another part. Tapping Submit will submit the part to be issued.



CANCEL PART CART


Job INSPECT TIRE - PNEUMATIC
06-017-001

Part Location Rooney Police Substation
10R00N

YOUR PART ISSUES

SUPPLIES MISC. MISC Qty: 1 / Avl: 2551 Unit Cost \$3.92



ISSUE PARTS

Request Part

Select Request Part to open a new screen to request a part:



Parts can also be added by comment and do not need to have a Part ID associated with the request.

The screen defaults to Part Info to search for a part. If there are Standard Parts for the Job, a number greater than 0 will display and you can select the appropriate part to add to the Part Cart. Standard Parts displays parts that are most associated or used with a specific Asset. If the number is greater than 0 in the sections outlined below, the link will be active and the user can view/select the parts.

- **Pre-defined** – Displays parts that have been pre-defined for this job. The percentage will vary based on how many times the part has been used for this job.
- **Asset** – Displays parts that have been used on this Asset for the job. The percentage will vary based on how many times the part has been used on this Asset for the job.
- **Spec** - Displays parts that have been used for Assets that share the same Tech Spec for the job. The percentage will vary based on how many times the part has been used for this job and the Asset's that within the same Tech Spec.

Assigned Work

Parts can be searched by Part ID or tap the ellipsis icon to the right of the field to search by description, Part ID, cross-reference, or BIN.

Once a part is selected, the On Hand and Available fields will be populated.

Enter the quantity to be ordered, as well as the Date Required, Time Required, and any notes if applicable.

Select Add to Cart to add the part to the Part Cart.

In the Part Cart view, you can edit the part being requested, remove a part, or add another part. Tapping the blue hyperlink on the Part ID will take the user to the Part Viewer, but if the part was requested using a comment there will not be a hyperlink to the Part Viewer. Tapping Submit will submit the part request.

The screenshot displays the 'PART CART' interface. At the top, there is an orange header bar with 'CANCEL' on the left and 'PART CART' in the center. Below the header is a white section titled 'YOUR PART REQUESTS'. The first request is a comment: 'I need a tire', with 'Required by: 12/16/21' on the right. Below the comment are the fields 'Req: 1/Avl: 0' and 'Unit Cost: Unknown'. The second request is for 'OIL (QUART) 5W30' with Part ID '75-050'. It shows 'Req: 4/Avl: 175' and 'Unit Cost \$2.60'. Both requests have edit and delete icons. A blue circular button with a white plus sign is located at the bottom right of the list. At the very bottom of the screen is a blue bar with the text 'SUBMIT REQUEST'.

Post Labor

Select Post Labor to post time for the job:

The screenshot shows a mobile application interface for 'Post Labor'. At the top, there is an orange header bar with the text 'Post Labor' in the center, 'CANCEL' on the left, and 'ADJUST COMPLETE SYSTEM' and '01-004-000' on the right. Below the header is a form with several sections: 'Position' (a text input field), 'Start Date & Time' (a section containing 'Start Date *' with a calendar icon, 'Start Time', and 'Total Hours *'), 'Labor Details' (a section containing 'Time Code *' with a dropdown menu showing 'Regular Time', and 'Pay Class/Step' with a dropdown menu), and 'Add Notes' (a text input field). At the bottom of the form is a blue bar with the text 'SAVE' in white.

Enter a Start Date and Total Hours, as well as a Time Code (ex. Regular Time). Other fields that can be entered include Position, Start Time, Pay Class/Step, and Notes. The user will not be able to enter any data that conflicts with the base product. For example, adding time before the WO/Job creation date will cause an error.

Edit Job

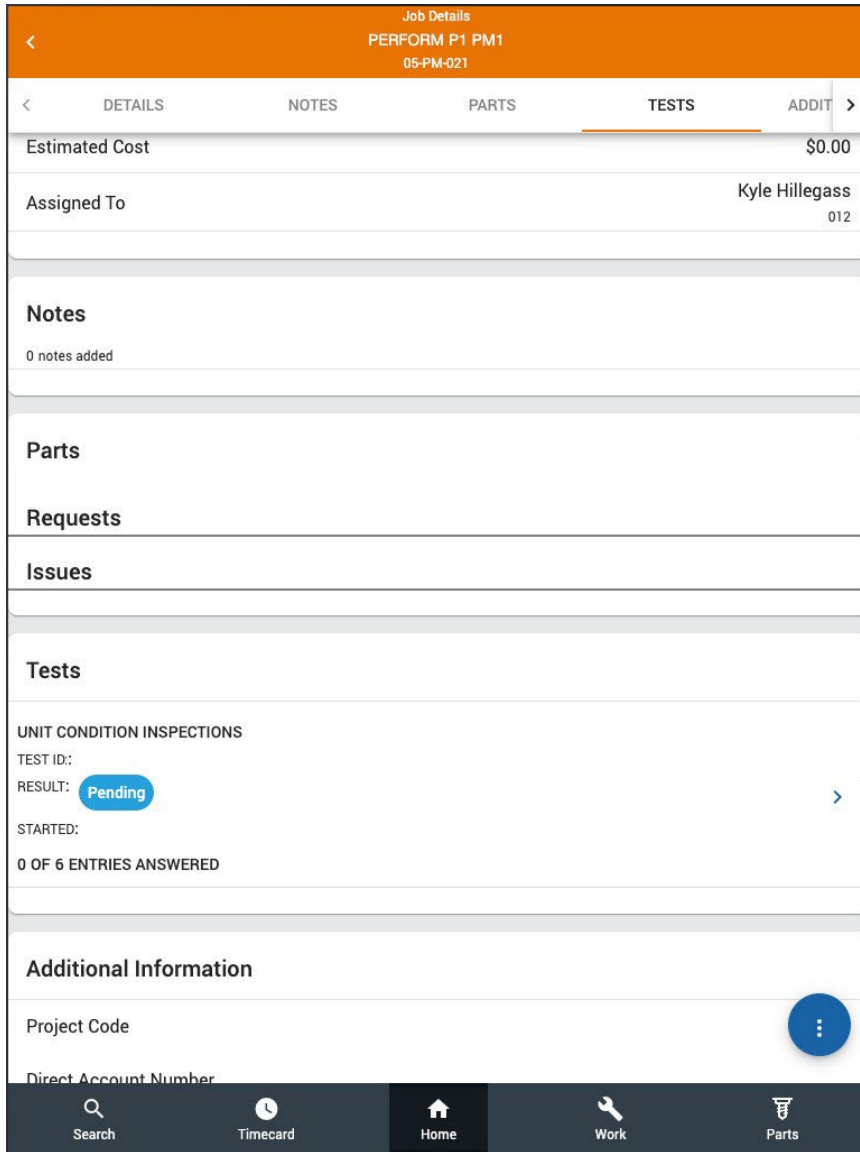
Select Edit Job to modify a Job Status, Job Reason, or Priority.

Take Photo

See the [Take Photo section](#) described in Work Order Details – Additional Options.

Job Tests

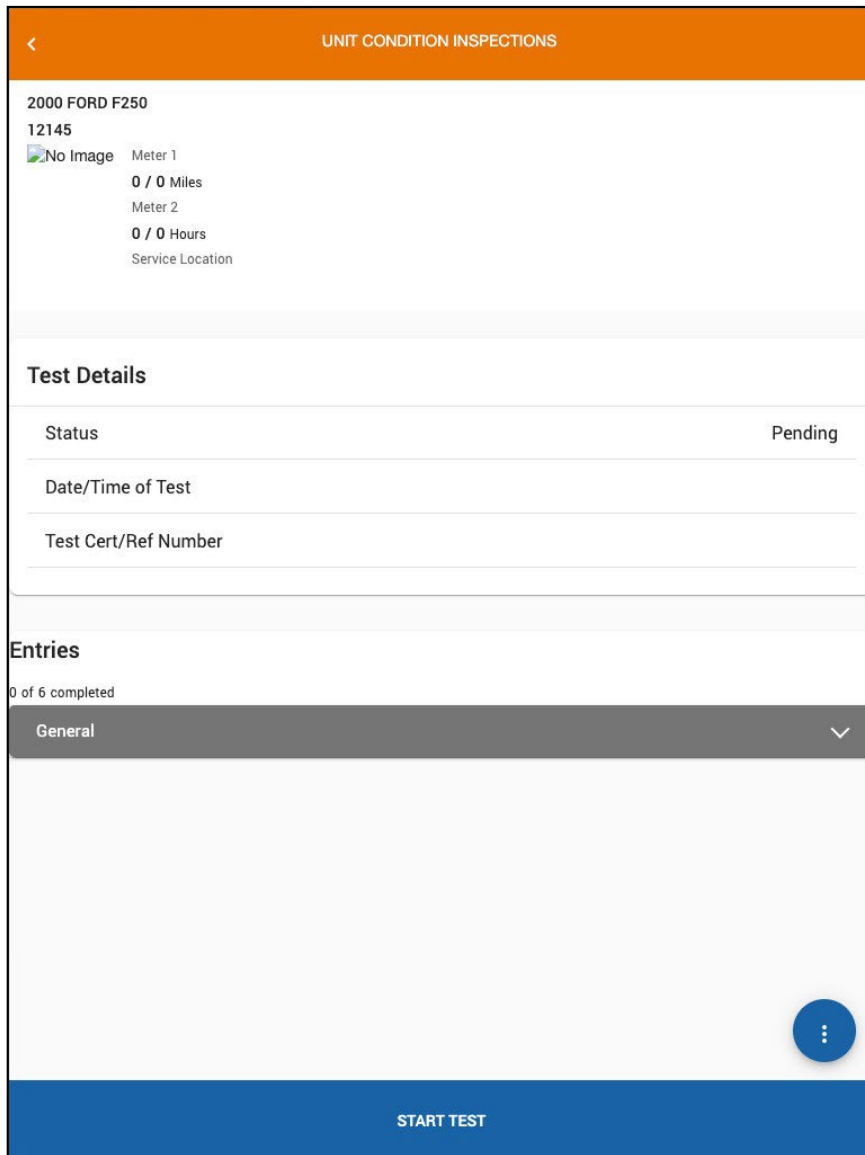
If a Job has a test, the test can be found on the Job Details screen in the Test section:



Tap the right arrow next to the test to access the test. Once started, the Tests section will be updated to show the status, date and time the test was started, as well as the test progress.

Test Details

When a test is accessed, the details page shows the Asset and entries that need to be completed. The test will display based on how it is configured in M5.



Assigned Work

In this example, tap General to see the entries:

| General  | |
|---|--------------------------------|
| <input type="radio"/> | INSPECTION PERFORMED DATE |
| <input type="radio"/> | INSPECTION PERFORMED BY |
| <input type="radio"/> | INSPECTION PERFORMED TIME |
| <input type="radio"/> | CONDITION LEVEL OF UNIT |
| <input type="radio"/> | UNIT SAFE FOR AIRPORT OPERATIO |

The icon next to each entry will change to show the status of each test item.



Using Test Suite Maintenance in M5, test entries can be grouped logically based on location, vehicle, or asset types.

To start a test, tap Start Test or tap an individual test from the list.

Working on a Test

When working on a test, certain data will need to be filled out or completed to satisfy the test requirements. In the below example the field is looking for a value, which is the date:

UNIT CONDITION INSPECTIONS
12145

TEST

INSPECTION PERFORMED DATE

DATE

Qualitative Value

NOT PERFORMED

Notes

VIEW CORRECTIVE JOB INFO ^

Job Location

Job Code 01-01

Job Reason R

Priority


Estimate

1 of 6

NEXT →

If a field is marked as “Not Required” the Technician will see a “Not Performed” button which will allow them to record that it was not done and skip the item. Notes can be added to provide additional information.

If there is a test failure, the View Corrective Job Info section will show the corrective job that will be created as a Work Request once the Work Order is completed.

Tapping the Ellipsis icon  will give the Technician the option to take a photo.

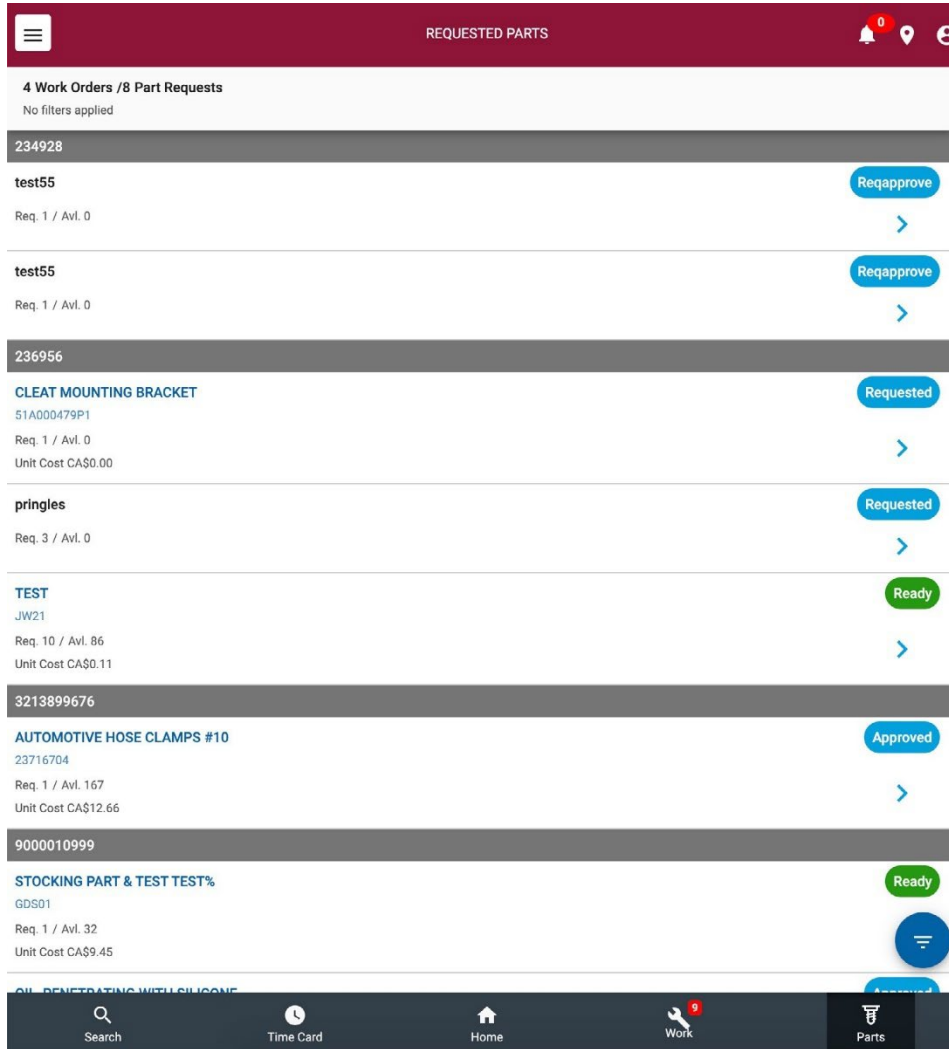
Saving and Completing a Test

The Test Details section will show if the test passed or failed. The date/time the test was started is also recorded. A Notes icon will display next to any test entries that have notes. To save the test and go back to the job, tap Save and Go Back. To complete the test, tap Save and Complete.

The screenshot displays the 'UNIT CONDITION INSPECTIONS' screen for unit 4928. At the top, it shows 'Meter 2' and '0 / 0 Hours'. Below this is the 'Test Details' section, which includes a pencil icon for editing. The test status is 'FAIL', the date/time is '3/10/20, 11:19 AM', and there is a field for 'Test Cert/Ref Number'. The 'Entries' section shows '3 of 6 completed' and a 'GENERAL' category. The entries list includes: 'INSPECTION PERFORMED DATE' (with a notes icon), 'INSPECTION PERFORMED BY', 'INSPECTION PERFORMED TIME', 'CONDITION LEVEL OF UNIT (1-9)' (with a red 'x' icon and a notes icon), 'UNIT SAFE FOR AIRPORT OPERATION (Y/N)' (with a green checkmark icon), and 'TEST' (with a radio button). At the bottom, there are two buttons: 'SAVE AND GO BACK' (blue) and 'SAVE AND COMPLETE' (orange). A blue circular menu icon with three dots is also visible in the bottom right corner.

Part Requests

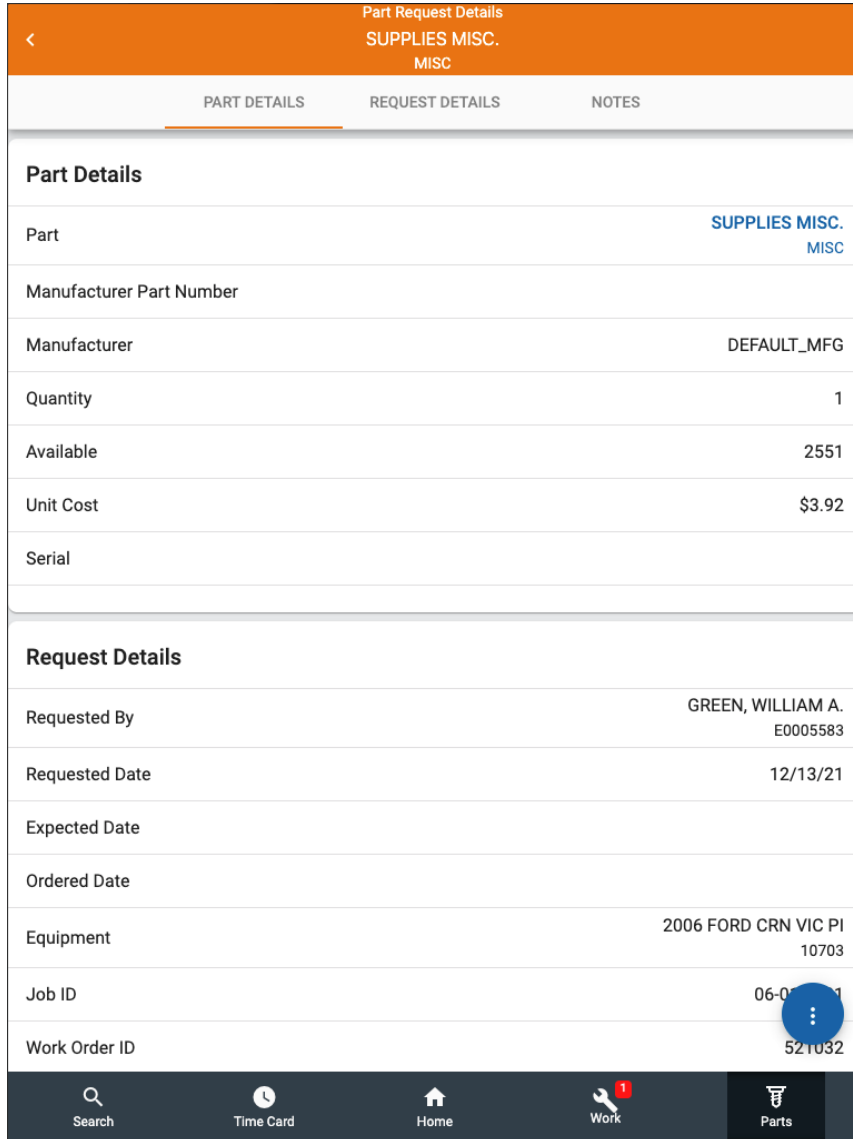
The Parts Requests section shows any open Part Requests that have been created. They are grouped by the Work Order ID and status:



The top of the screen shows the number of Part Requests for all Assigned Work and if any filters have been applied. Each Part Request displays a Part ID, the number requested, and the unit cost if available. Tapping the Part ID will open a Part Viewer screen with more detailed information about the part. Tapping the right arrow will open a Part Request Details screen with more detailed information about the Part Request.

Part Request Details


The Part Request Details screen displays the Part name and ID as well as the following sections:

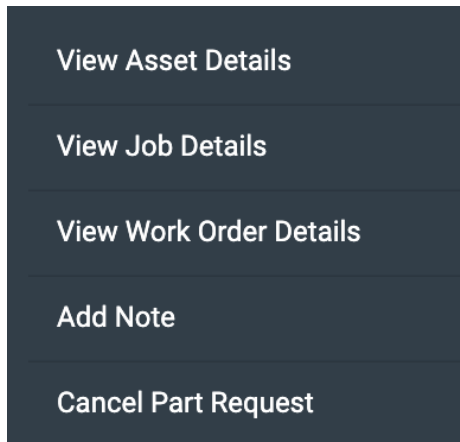


Part Details – more information about the part, like the name, manufacturer, quantity, and quantity available. If the part is requested using a Part ID, the user will be able to access the Part Viewer by tapping the blue hyperlink. If the part is requested using a comment, the hyperlink is not available.

Request Details – more information about the request, like who made the request, the requested date, and the expected and ordered dates.

Notes – any notes about the request.

At the bottom right of the screen there is an Ellipsis icon  with additional options:



Each option is described below.

- **View Asset Details** - Select to view the [Asset Details](#).
- **View Job Details** - Select to view the [Job Details](#).
- **View Work Order Details** - Select to view the [Work Order Details](#).
- **Add Note** - Select Add Note to add a note to the Parts Request. See the [Add Note section](#) described in Work Order Details – Additional Options.
- **Cancel Part Request** - Select Cancel Part Request to cancel the request.



Labor Wedge Quick Guide

Version 23.0.x | March 2023

Copyright © 2023 AssetWorks Inc. its subsidiaries. All rights reserved.

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: <https://community.assetworks.com/hc/en-us>

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.

Labor Wedge - Quick Guide

Version 23.0.x

March 2023

Contents

- Overview..... 1**
- Setup1**
- Punching into a Work Order Job or Indirect Account..... 3**
- Using Part Requests in Labor Wedge 6**
- Punching an Employee Out of the System..... 10**
- Adjusting Labor Charges 10**
- System Flags..... 11**

Overview

The Labor Wedge allows for the viewing and recording of real time labor information as your employees are performing and completing work order tasks.

Setup

For use of Test Suites within Labor Wedge, processing is configured by system flag 5162 – “Test Suites Affect Labor Wedge” upon completion of a job on a work order.

If the System Flag is set to 1, Labor Wedge will complete the job without checking the test suites for the job

If the System Flag is set to 2 and the job has test suites where no results have been entered or the results are incomplete, and the mechanic changes the job status to DON, the screen will display a warning but let the mechanic change the job status to DON and save the change

If the System Flag is set to 3, the frame will not allow the mechanic to change the job status to DON and will force the entry of test suite data. A message appears to let the mechanic know there is an open Test Suite on the job.

If the System Flag is set to 4, the screen will give a warning message to the user when they log onto a job associated open test suite in the very beginning of the process. As the mechanic is completing the job, based on the revised System Flag 5162, they will not be allowed to change the job status to DON and save the change until the Test Suites results have been entered and the Test Suites have been stamped completed.

Also, if the mechanic adds a job to the work order through the Labor Wedge screen and the job has an associated Test Suite, they will also get the message alerting them that there is an open Test Suite.

When the mechanic returns to the Labor Wedge screen to update the status of the job, they will be able to click on the Test Suites icon to view the Test Suites and update the test results.

Depending on how flag 5150 is set as to what view of LABOR WEDGE will be displayed. The screen shot below shows Labor Wedge when the flag is set to Y.

SAVE
UNDO
REFRESH
DELETE
FIND
RELATED ▾

Work Order Labor Wedge

Employee

Employee ID:

Current Labor for authorized location groups - automatic refresh every 90 seconds (Loaded 22 records)

| Employee | Employee Name | Employee Home Loc | Unit / Department | Indirect Code | WO Number | Job Code | Punch Loc | Punch In | Elapsed Time | Time Unit | Assignment | New Request |
|----------|---------------|-------------------|-------------------|---------------|-----------|----------|-----------|---------------------|--------------|-----------|------------|---------------------|
| CNEMP001 | employee 001 | CNLOC1 | CNCAR025 | | 533116420 | CN-21 | CNLOC1 | 02/22/2017 18:14:21 | 14128.11 | Hour(s) | | Add |
| CNEMP003 | employee 003 | CNLOC1 | CNCAR038 | | 533117042 | CN-81 | CNLOC1 | 02/23/2017 17:13:50 | 14105.12 | Hour(s) | | Add |
| 9321 | employee | FM | | AK | | | FM | 10/06/2017 12:46:48 | 8710.57 | Hour(s) | | Add |

Punching into a Work Order Job or Indirect Account

1. Open the Labor Wedge frame.
2. If flag 5150 is set to Y, then either double-click on your ID or enter an employee ID in the *Employee ID* field. Press Tab. Or scan an employee ID. If System Flag 5009 is set to Yes, an employee pin number will be required. The default is No.
3. If the employee is currently logged into a job, the *Last WO/Job* field displays the work order number and job code, and the cursor moves to the *Status* field.

SAVE UNDO REFRESH DELETE FIND MORE ▾ RELATED ▾

Labor Wedge

Employee

| | |
|--------------------------|---------------------------------|
| Employee ID: MACEMP13 | Time On Job: 5880.51 Hour(s) |
| mac tester 13 M M | |

Last Work Order

| | |
|----------------------------|--------------------------------|
| WO Number: 920992 | |
| Unit/Dept No.: 6225-667 | 2014 ABLE-2 30-105 |
| Job Code: 13-12-001 | MODIFY AXLE - REAR, NON-DRIVEN |
| Job Status: WIP | WORK IN PROGRESS |
| Position: | |
| Time Type: 01 | Regular Time |
| Pay Class / Step: 100 | 10 |
| | Regular |

[View Work Order](#)
[Add Job Notes](#)
[Part Requests for this Job](#)

New WO/Indirect Code

| | |
|---------------------------------|--|
| Unit Number: | |
| New Work Order / Indirect Code: | |

[View My Job Assignments](#) [View My Part Requests](#)

4. Enter the downtime status for the last job and work order in the *Status* field. Press Tab. Or scan the downtime status. If flag 5237 is set to Y to display employee assignments from LABOR WEDGE and, if the View My Job Assignments hyperlink is available, the user can hover over the hyperlink to view any jobs assigned to them as shown below. To go on to any of the assigned jobs, click on the Add hyperlink.

SAVE
UNDO
REFRESH
DELETE
FIND
MORE ▾
RELATED ▾

Labor Wedge

Employee

Employee ID: SMTTEMP test employee S S Time On Job: 14107.13 Hour(s)

Last Work Order

WO Number: 157872

Unit/Dept No.: 423923 2003 AUTOCAR WX64

Job Code: 01-00-001 REPAIR NEW UNIT IN-SERVICE INSPECTION

Job Status: WIP WORK IN PROGRESS [View Work Order](#)

Position: [Add Job Notes](#)

[Part Requests for this Job](#)

Time Type:

Pay Class / Step: 1 1 Regular Pay

New WO/Indirect Code

Unit Number:

New Work Order / Indirect Code:

| WO NO | Job | Description | Part | Part Description | Request Qty | Status |
|--------|-----------|------------------------------|------|------------------|-------------|---------|
| 918932 | 05-13-001 | INSTALL FRONT BRAKES & DRUMS | 004 | TEST | 3 | REQUEST |

[View My Job Assignments](#)
[View My Part Requests](#)

5. If the employee is not currently logged into a job, the cursor moves to the New Work Order/Indirect Account section where you can enter the new Work Order/Indirect Account number or Unit Number.
6. Enter or scan a work order number or indirect account code or unit number in the New Work Order/Indirect Account field. Press Tab.
7. The system checks the Union-changing or Pay-changing field on the Indirect Account frame. If either field is set to "Y" and the Work order required? Indirect Account frame field is set to "Y", the necessary Relief Information fields can be accessed for user entry. If applicable, enter the union, class, step, work order, and job information.

8. If you entered a work order in step 5, the cursor moves to the Job field. Enter or scan a job code (do not use the separating dashes) in the Job field. Press Tab.
9. From the File menu, select Save to save the labor information.
10. The downtime status automatically changes to WIP (work in progress). When you want to change the status because you are waiting for parts or logging off for the day, for example, you must log back into Labor Wedge frame, enter the employee ID and then enter a new downtime status. The work order or indirect account charge time is posted to the direct or indirect labor table.

Using Part Requests in Labor Wedge

There are several ways a Technician can create a part request from the Labor Wedge screen. If current labor is displayed, the screen is shown below. In order to use the functionality there is required configuration.

The use of the new Part Request screens in M5 requires a review of system flags and role privileges. System flag 5292 “Allow Part Requests on Labor Wedge? (Y/N)” controls whether users can see the part request hyperlinks and icons on Labor Wedge. If system flag 5150 – “Display CURRENT LABOR information on LABORWEDGE (Y/N)” is Y, and system 5292 is also Y, then part request icons will display for each row that exists on Labor Wedge.

Images have been added next to the work order and job code that means part requests are in various statuses. The icons can be clicked which will launch a display screen showing the part request details. A new column has been added to the right called “new request” with a hyperlink that allows a user to create a new part request with the row’s details such as employee number, work order and job code.

| Employee | Employee Name | Employee Home Loc | Unit / Department | Indirect Code | WO Number | Job Code | Punch Loc | Punch In | Elapsed Time | Time Unit | Assignment | New Request |
|----------|---------------|-------------------|-------------------|---------------|-----------|----------|-----------|---------------------|--------------|-----------|------------|-------------|
| CNEMP001 | employee 001 | CNLOC1 | CNCAR025 | 533116420 | 533116420 | CN-21 | CNLOC1 | 02/22/2017 18:14:21 | 14131.34 | Hour(s) | | Add |
| CNEMP003 | employee 003 | CNLOC1 | CNCAR038 | 533117042 | 533117042 | CN-81 | CNLOC1 | 02/23/2017 17:13:50 | 14108.35 | Hour(s) | | Add |

The green dot next to a work order means there are requests in READY status. If it is on the job, it means the job has a part request in READY status.

The yellow exclamation icon next work a work order means there are parts in REQUEST, ORDERED, IN-REQ, and APPROVED status. If it is on the job, it means the job has for that work order has the same.

The red stop sign means there are part requests for the work order/job that are in REQ-APPROVE status. Only authorized users (based on the new privilege mentioned above) can approve a part request.

If the employee double clicks the row, the process of signing off and on and job brings up the next screen.

The screenshot displays the Labor Wedge interface with the following sections:

- Employee:** Employee ID: SMTESTEMP, test employee S S; Time On Job: 14107.13 Hour(s)
- Last Work Order:** WO Number: 157872; Unit/Dept No.: 423923, 2003 AUTOCAR WX64; Job Code: 01-00-001, REPAIR NEW UNIT IN-SERVICE INSPECTION; Job Status: WIP, WORK IN PROGRESS; Position: [redacted]; Time Type: [redacted]; Pay Class / Step: 1, 1; Regular Pay
- New WO/Indirect Code:** Unit Number: [redacted]; New Work Order / Indirect Code: [redacted]
- Table:** A table with 7 columns: WO NO, Job, Description, Part, Part Description, Request Qty, Status. One row is highlighted in blue: 918932, 05-13-001, INSTALL FRONT BRAKES & DRUMS, 004, TEST, 3, REQUEST.
- Links:** View My Job Assignments, View My Part Requests

The various colors (green, yellow and red) are also used to display the status of related part requests as shown in new part request hyperlinks on this screen.

To create a part request for the job the employee is logged into, then they need to click the “part requests for this job” located next to the job code.

The hyperlink launches Part Request Screen. Creating the part request in this manner (vs. the menu) will pre-populate the Technician ID, work order number and job code so there are less key strokes. The Technician can see any existing part requests on the Part Request Screen along with the status.

The screenshot shows the 'Part Request' interface. At the top, there are buttons for 'SAVE', 'UNDO', 'REFRESH', 'DELETE', 'FIND', and 'RELATED'. Below these is the 'Part Request' form with the following fields:

- Technician: CNEMP002
- Unit/Dept/Comp: CNCAR145 2009 C2500 4X4 SUBURBAN
- WO No: 533116019

Below the form are 'Check Status' and 'Clear' buttons. The main section is titled 'Existing Requests for WO 533116019 (Loaded 7 records)'. It contains a table with the following data:

| Job Code | Part No | Description | Avail Qty | Request Qty | Total Inv Cost Emp | Needed By Date | Requested By | Status | Picked up? | Ordered? | Notes |
|----------|--------------|------------------------|-----------|-------------|--------------------|---------------------|--------------|---------|--------------------------|--------------------------|--------------------------------------|
| CN-01 | CNFLYPART004 | STOCK FLY PART 004 | 0 | 1 | \$125.00 | 03/27/2018 17:07:11 | CNEMP001 | REQUEST | <input type="checkbox"/> | <input type="checkbox"/> | <input type="button" value="Notes"/> |
| CN-01 | CNFLYPART005 | NON-STOCK FLY PART 005 | | 1 | \$147.00 | 03/27/2018 17:14:38 | CNEMP001 | REQUEST | <input type="checkbox"/> | <input type="checkbox"/> | <input type="button" value="Notes"/> |
| CN-01 | CNPART006 | CNPART006 | 110 | 1 | \$23.44 | 03/27/2018 17:19:24 | CNEMP001 | REQUEST | <input type="checkbox"/> | <input type="checkbox"/> | <input type="button" value="Notes"/> |
| CN-02 | CNFLYPART006 | STOCK FLY PART 006 | 0 | 1 | \$125.00 | 03/27/2018 17:27:56 | CNEMP001 | REQUEST | <input type="checkbox"/> | <input type="checkbox"/> | <input type="button" value="Notes"/> |
| CN-02 | CNFLYPART007 | NON-STOCK FLY PART 007 | | 1 | \$123.36 | 03/27/2018 17:28:39 | CNEMP001 | REQUEST | <input type="checkbox"/> | <input type="checkbox"/> | <input type="button" value="Notes"/> |
| CN-02 | CNPART007 | CNPART007 | 11 | 1 | \$6.76 | 03/27/2018 17:46:10 | CNEMP001 | REQUEST | <input type="checkbox"/> | <input type="checkbox"/> | <input type="button" value="Notes"/> |

The Part Request screen is used to submit part requests to be handled by the personnel controlling inventory in a parts room setting. It is a means of communication that parts are needed for a specific Technician/Work Order/Job code along with a need by date. The Technician will enter the information for parts needed into the Part Request screen. Part number is not required and the part description can be entered instead, along with a request qty. The part number LOV supports 3 types of LOV searches and they are: search for parts issued to any unit with the same tech spec and job code combination, a list of standard parts if they exist for the job (standard job tech spec) and the part catalog by location search

The location where the parts are being requested will default to the inventory location associated to the job location. A note can be entered for the request. Once saved, the request will be routed to the Part Request Handling screen (new).

All existing part requests for the work order and job are displayed at the bottom of the Part Request screen regardless of the Technician that submitted the request. This is helpful in case a Technician is out and another Technician has taken over the work order/job.

If a mistake occurs, the Technician is allowed to cancel the request by clicking the existing row at the bottom of the screen and clicking the delete icon as long as the request is in REQUEST status.

The Technician will save the part request and the form does not clear allowing the Technician to quickly enter a request for a new part for the same work order and job.

A part request will have several statuses. They are:

1. REQUEST – new request created
2. ORDERED – part had to be ordered using part requisition or purchase order
3. REQ APPROVE – requires supervisor approval
4. IN-REQ – the part request has been made into a part requisition
5. APPROVED – supervisor approved part request
6. READY – parts person has changed the status to ready which will alert the Technician the parts are ready for pickup
7. CANCELLED – either the Technician, Supervisor, or Parts Person can cancel the request
8. CLOSED – The part has been issued

The “view my part requests” hyperlink is a hover table that when the user hovers the cursor over it, shows all requests for all work orders/jobs for the specific employee logged in that are not in CANCELLED or CLOSED status.

Punching an Employee Out of the System

1. Open the Labor Wedge frame.
2. Enter an employee ID in the *Employee ID* field. Press Tab. Or scan an employee ID.
3. Enter the status for the last job and work order in the *Status* field. Press Tab. Or scan the status. Or, if you are still working on a job, enter the job status your company requires when you log out for the day.
4. The *New Work Order/Indirect Account* field is highlighted.
5. Enter "BYE" (without the quotes).
6. From the File menu, select <Save> to save the labor information.

Adjusting Labor Charges

You can adjust a specific labor charge transaction for erroneous information. By adjusting the time, you do not actually alter the original transaction, but post an adjustment transaction with the same code to the charge table. Charge transactions can be of positive or negative duration.

1. Enter the work date time period that you would like to display.
2. Highlight the row you want to adjust.
3. Double click on the row. The entry's start time, time type, and informational code are entered on the Labor Time Card table field. The Labor Time Card status line displays the selected charge transaction's original duration. For example, "Time on received line was 2.50".
4. Change or add information where needed.
5. If necessary, repeat steps 1-4.
6. To save the adjustment, select Save from the File menu.

System Flags

| | |
|------|---|
| 1200 | Add new job to Labor Wedge |
| 1212 | Time before WO open for labor charges |
| 1213 | Validate pay class on labor charges? |
| 2005 | Refresh interval for Current Labor |
| 2046 | Employee password required for laborwedge (0,1,2)? |
| 2140 | Enable enhanced warranty exclusions? (Y/N) |
| 5001 | Adopting 3-charge SYSTEM code/10-char JOB code? |
| 5003 | Capture Time Type / Pay Class / Step on Labor Entry |
| 5009 | Use employee PIN on LaborWedge |
| 5016 | Use Position Code on WO? (N-No, Y-Yes, A-Advanced) |
| 5150 | Display CURRENT LABOR information on LABORWEDGE (Y/N) |
| 5162 | Test suites affect Labor Wedge in four different ways -- 1), 2), 3) and 4). |
| 5216 | Display Warranty Violations on Labor Wedge and Touchscreen? |
| 5233 | Assignment of Employee by Resource Type? (Y/N) |
| 5236 | Use the parking spot concept? (Y/N) |
| 5237 | Display Employee Assignment link from Labor Wedge? (Y/N) |
| 5292 | Allow Part Requests on Labor Wedge?(Y/N) |
| 5301 | Job Note Ready Only? (Y/N) |
| 5305 | Create note when a labor wedge transaction is modified by another person? (Y/N) |
| 5354 | Allow completing work order from labor wedge? (Y/N) |
| 5444 | Allowed to enter jobs for any location on Labor Wedge? (Y/N) |
| 5495 | Make Job Notes Mandatory (Y/N)? |



Physical Inventory Management

Quick Guide

Version 23.0.x | March 2023

Copyright © 2023 AssetWorks Inc. its subsidiaries. All rights reserved.

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.

Physical Inventory Management - Quick Guide

Version 23.0.x

March 2023

Contents

- Summary..... 1**
- 1. System Settings 2**
 - System Flags 2
 - Role Privileges..... 2
- 2. Data Setup 3**
 - Cycle Count Codes..... 3
- 3. ABC Class Codes..... 4**

Summary

This quick guide is intended to provide an overview of the M5 Physical Inventory Process. Controlling the accuracy of parts inventory is a very important system function. Organizations have several options available to identify and track the parts that will be included in physical inventories:

- Cycle Counts
- ABC Classifications
- Part Specific Data

In addition to the available methods for conducting the inventory process, this guide will cover the system settings, data setup, and workflow required for the module.

System Settings:

- System Flags
- Role Privileges

Data Setup:

- Cycle Count Codes
- ABC Class Codes
- Part Inventory Parameters

Workflow

- Physical Inventory Manager
- Create Count Sheet
- Enter Count
- Variance Report
- Adjust Count

1. System Settings

Various settings will have a direct impact on functionality and how the system will behave in certain scenarios.

For the Physical Inventory Module, the primary system settings that will drive functionality are system flags and role privileges.

System Flags

2020 – Close-part Inventory (Y) or Open-part Inventory (N) – This flag indicates whether the Physical Inventory process will be performed using an Open or Closed parts room scenario, i.e. will the user allow parts to be issued and processed while the Physical Inventory process is going on?

5038 – Update ABC Class codes to the Part Inventory Location frame? (Y/N) – If the user sets the flag to Yes, then the ABC Class codes will be updated at the location level by the running of the PINVMM process (via EOP) following the Physical Inventory count.

5059 – Upload Physical Inventory Count? – This flag indicates if a remote processing device will be used to upload data from handhelds in the physical inventory process.

5132 – Physical Inventory Count Sheet line items (9 to 20) – Choose the amount of line items per page for a Physical Inventory count sheet. Value range is between 9 and 20 inclusive.

Role Privileges

INV CYCLEDATE SPREAD – Allows a user to spread physical inventory cycle count dates.

MOBILE – PHYS INVTRY – Allows a user to perform physical inventory activities via a mobile device.

UPDATE PART INVENTORY – Allows the user to update part inventory.

2. Data Setup

Cycle Count Codes

SAVE
UNDO
REFRESH
DELETE
FIND

Cycle Count Codes

Cycle Codes (Loaded 5 records)

| Code | Description |
|------|-------------|
| 1 | 1 day |
| 120 | 120 day |
| 30 | 30-day |
| 60 | 60 Day |
| 90 | 90 Day |
| | |

The Physical Inventory has a selection criterion called "Cycle Count Date". This selects all parts whose next physical inventory count date falls on the Monday that is earlier than the present date plus five days. (Essentially, it is assumed that users will run their cycle counts once per week.)

A column exists on part_inv_loc for the last cycle count date (lt_cycle_dt). It can be the date the part was last counted as part of a cycle count, but it is primarily used as the baseline from which to calculate the next cycle count date for the part.

For parts that are part of a cycle (cycle_count_days > 0), the next_phy_dt function uses lt_cycle_dt, not lt_phy_dt to get the next PI cycle count date.

You will need the following authorization to utilize the functionality that allows the setting of the baseline date/next PI count date on the ABC Class frame: **INV CYCLEDATE SPREAD**.

To create a code, enter a unique code in the Code field along with a description for the code. Typically, these codes will be measured in terms of days.

For example:

| | |
|------------|----------------------|
| 90 | 90-Day Count |
| 120 | 120-Day Count |

When finished, click the Save button.

ABC Class Codes

The ABC Classes must be configured for every part that you want included in the weekly cycles. Each part must be assigned to an ABC Class and the ABC Class code requires some configuration.

ABC Class Codes

ABC Class & Location Codes

Location Code: DSNY-CRS MINOR REPAIR SHOP

ABC Class Code:

Class Definition

This Code Other Codes Total should not exceed 100%

Line Item:

% % %

Usage Value:

% % %

Smoothing Factors

Usage Factor (Value between 0 and 1):

Service Level Factor: %

Physical Inventory Parameters

Recount Quantity:

Recount Dollars:

Recount %:

Cycle Count Days: ←

Establish the next cycle count date

Set random date for all new parts

Set fixed date for all parts ←

Use as default for new parts

2. Save

1. Set Interval

3. Select one of these

4. Save

1. Set the cycle interval:
 - a. If you want each part at this location that is a class "A" part counted every 6 months, then set the interval to 182 as shown in the example.
 - b. If you want each part counted once a year, then set the interval to 365. You can use any interval.
2. Save settings.
3. There are two options here, but the "set random date for all new parts" must be selected when you are initially creating a cycle.
4. Save settings:
 - a. After saving, the radio button selected will revert back to being unchecked. This save will set the initial cycle date (column `lt_cycle_dt` on table `PART_INV_LOC`) on all the parts at this location ("MINOR") in this class ("A").
 - b. It will disperse the dates across all parts evenly over the length of the interval.
 - c. So, let's assume you have 156 stock class "A" parts at this location and the interval is 365 days. There's 52 weeks a year, so 3 parts will be slotted into each week randomly, 52 times 3 and that accounts for all 156 parts.
5. Do this one time for all inventory locations and classes that you want to activate cycles for.
6. Setting a fixed date for all parts:
 - a. If you select the "Establish fixed date for all parts in this class" option will prompt the user for a specific date to set all parts in the specified location and class, regardless of whether the part has a "next count date" or not.
 - b. User must enter a future Monday. You always enter the next PI cycle count date you want to set for all of these parts.
 - c. Using this option will cause all the parts to be selected on the same week as the date you just entered.
 - d. Using this option does not create evenly dispersed cycles throughout the year.

More on ABC Class Codes

ABC Class codes are user-defined inventory movement codes assigned to stock parts used to indicate slow, medium, and fast-moving parts for the purpose of reordering those parts, specifically this pertains to 'automatic' reordering. If you are using the 'manual' reordering option, ABC Class Codes will not need to be setup unless you want to use them to help control Physical Inventory Counting.

ABC Class Codes are setup at the inventory location level, meaning each location designated as an inventory location will have its own set of ABC Class Codes.

M5 supports up to 36 ABC Class Codes, but for the purposes of this example, we will use just three: A, B, and C.

Create a New ABC Class Code

Type in a valid inventory location in the Location Code field. Enter in a code, for example A, B, or C. This field has a limit of one character.

Traditionally, an 'A' part would indicate the most important parts, the high value parts. In a traditional model 'A' parts account for a large portion of the overall value but a small percentage of the total count of stock parts moved out of inventory.

Ultimately, it is up to the organization to decide how they wish to implement the ABC Class Codes and which codes will indicate which type of value to the organization.

Class Definition Section:

The values entered in this section will designate the importance of each ABC Class Code for the inventory location.

- **Line Item** – This value is based on count. It will reflect the percentage of all parts being moved, i.e. transferred or issued, out of inventory for the location.
- **Usage Value** – This value represents the percentage of the total amount of money spent on the parts moved out of inventory, i.e. everything issued or transferred at the inventory location.

Here is an example of ABC Class Coding with A parts as the highest value parts:

- 'A' Parts – 20% (Line Item) of parts moved for 70% (Usage Value) of the total value of the parts moved.
- 'B' Parts – 30% (Line Item) of parts moved for 25% (Usage Value) of the total value of the parts moved.
- 'C' Parts – 50% (Line Item) of parts moved for 5% (Usage Value) of the total value of the parts moved.

Another example of ABC Class Coding with A parts as the most frequently moved parts:

- 'A' Parts – 70% (Line Item) of parts moved for 10% (Usage Value) of the total value of the parts moved.
- 'B' Parts – 20% (Line Item) of parts moved for 25% (Usage Value) of the total value of the parts moved.

- 'C' Parts – 10% (Line Item) of parts moved for 65% (Usage Value) of the total value of the parts moved.

There should be an inverse relationship between the Line Item and Usage Values at the high and low ends, and your middle codes, i.e. 'B' parts in this example, should have values much closer to each other.

NOTE: These values for both Line Item and Usage Value for all ABC Codes MUST add up to 100%.

Smoothing Factors Section:

The ABC Class also has two “smoothing” factors that will be factored into the automatic reorder calculation.

- **Usage Factor** – This value how much the calculated usage can bend the forecast. As an example, a part is order exactly ten times a month for two years. The forecasted usage for next month will also be to use ten parts. But what should the forecasted usage be if zero parts are used for the month? If the usage factor is 10%, then the forecasted usage will be bent 10% towards the actual usage.
- **Service Level Factor** – When a part is needed, what percentage of the time should it be in stock? Parts of the highest importance should have higher service levels. For example, 'A' parts might be expected to be in stock 95% of the time when one is needed. There is a cost associated with establishing high service levels in that more parts needing to be on the shelf “just in case”, will drive up inventory costs.

Physical Inventory Parameters Section:

Physical Inventory Parameters can also be setup for ABC Class Codes that will be associated with parts that are designated with the ABC Class Code.

- **Recount Quantity** – if a count is off by this number, it triggers a recount.
- **Recount Percentage** – if a count is off by this percentage, it triggers a recount.
- **Recount Dollars** – if a count is off by this amount of money, it triggers a recount.
- **Cycle Count Days** – selects the parts to be counted based on a particular number of days since the last part was counted. For example, a 7 in this field would mean that if a part has not been counted for 7 days it would be included in the next count.

These values will carry over to the Part Inventory Parameters frame for individual parts designated with the ABC Class Code.

Establish Next Cycle Count Date:

- **Set Random Date for All New Parts** – click this radio button to set a random cycle count date for new parts.
- **Set Fixed Date for All Parts** – click this radio button to set a fix date for the next cycle count
- **Use as Default for New Parts** – check this box to use these physical inventory parameters for new parts with this ABC Class Code at this location.

Part Inventory Parameters

SAVE
UNDO
REFRESH
DELETE
FIND
RELATED ▾

Part Inventory Parameters

Location: AUTOMOTIVE - FLEET - PARKING ENF WESTERN

Part Identification

 Number: Manufacturer:
 X Refs: ▾
 Description: Status: Type:

Physical Inventory Parameters

Cycle Count

 Code:

ABC Parameters

| | Override Values | System Values |
|-------------------|----------------------|----------------------|
| ABC Class: | <input type="text"/> | <input type="text"/> |
| Cycle Count Days: | <input type="text"/> | <input type="text"/> |
| Recount Qty: | <input type="text"/> | <input type="text"/> |
| Recount Price %: | <input type="text"/> | <input type="text"/> |
| Recount Dollar: | <input type="text"/> | <input type="text"/> |

Next Physical Inventory

 Date: Cycle Count Baseline Date:

Current Physical Inventory

 Id:

Last Physical Inventory (Loaded 0 records)

| Date | Quantity | Price | Value | Variance |
|---------------|----------|-------|-------|----------|
| [Empty Table] | | | | |

The Part Inventory Parameters frame allows you to view and modify the Physical Inventory parameters for a particular part. These parameters determine how parts are counted during a physical inventory.

To view or modify the parameters for a specific part, start by entering the inventory location of the part in the Location field at the top of the frame.

Part Identification:

- **Part Number** - Enter the part number from Part Main here; the part must be a valid part at the inventory location selected. You can also double click in the field to select a part from the list of values (LOV).
- **X Refs** - This field will populate automatically with any cross references for the part.
- **Description** - Read-only, description will populate automatically with the value from Part Main.
- **Manufacturer** - Read-only, Part Manufacturer will populate automatically with the value from Part Main.
- **Status** - Active/Inactive, read-only value from Part Main.
- **Type** - New/Used/Rebuilt, read-only value from Part Main.

Physical Inventory Parameters:

- **Cycle Count** - A Cycle Count is one method for collecting physical inventory counts. Cycle Count Codes determine how often a physical inventory count is performed on a specific part. Enter a code or double click in the field to select one from the list of values (LOV).
- **Next Physical Inventory Date** - Date of the next scheduled physical inventory, read-only.
- **Cycle Count Baseline Date** - Used as the baseline to schedule future counts.
- **Current Physical Inventory ID** - If the part is currently part of an existing Physical Inventory, that ID will display in this field.

ABC Parameters:

ABC Class codes are user-defined inventory movement codes assigned to stock parts used to indicate slow, medium, and fast-moving parts for the purpose of reordering those parts, specifically this pertains to 'automatic' reordering.

If you are using the 'manual' reordering option, ABC Class Codes will not need to be setup unless you want to use them to help control Physical Inventory Counting.

The System Values will populate automatically if the part has valid ABC Class Code assigned on the Part Inventory Location Manager frame (Reorder tab). You can enter Override Values if necessary.

For a more in-depth explanation of ABC Codes, see ABC Class Codes section above.

Last Physical Inventory:

This section will display the data from previous Physical Inventories involving the part. Each record lists the Date, Quantity, Price, Value, and Variance for the part.

3. Workflow

Create Count

| | |
|------------------------|---|
| Location | The location where the physical inventory will be conducted. |
| New Phys Inv ID Button | Click this button to create a new physical inventory. |
| Method | The different methods to conducting the physical inventory are: bin, cycle count days, ATA system, ATA component, cycle code, part number, seasonal, unit cost, and value amount. |
| Options | Depending on what method chosen the options to select are all, specific and range. If the options for specific and range are selected, the range or specific selections must be entered as the next step. |
| Reselect Flag | Reselect parts are counted within cycle? If cycle counting is being used, if this flag is set, the parts will be included in this count. |
| Count Sheet Sort by: | The count sheets can be sorted by bin or part number. |

| | |
|-------------------------------|--|
| Counts | After the user saves, the count information will be displayed which shows part line count, part item count and value of the inventory to be counted. |
| Run Interval | Enter a value if using options other than 'once.' |
| Exclude Weekends and Holidays | Check this box to exclude weekends and holidays in the count. |
| First Execution Date/Time | Date/Time of first execution |
| Schedule/Reschedule | Click this button to schedule the physical inventory. |

Physical Inventory Manager

SAVE
UNDO
REFRESH
DELETE
FIND
RELATED ▾

Physical Inventory Manager

Location
 Location: FM AUTOMOTIVE - FLEET - PARKING ENF WESTERN

Option Buttons
Create Count Sheet Enter Count Variance Report Adjust Count

Physical Inventory Detail (Record 1 of 1)

| Phys Inv ID | Status | Status Date | Last Upload Amount | Last Upload Processed | Indirect Account | Method |
|-------------|----------|---------------------|--------------------|-----------------------|------------------|-----------|
| 277 | Selected | 08/15/2019 11:16:03 | 0 | 0 | | CYCLECODE |

This is where you create the count sheets, enter counts, print the variance reports, and make the inventory adjustments.

Inventory Statuses:

- **In Progress** – ready to create the count sheet.
- **Counted** – after the counts have been entered
- **Variance Printed** – after the variance report is printed
- **Variance Print (Recount)** – the variance report was run again to do a recount

Click in the row that contains the physical inventory to begin processed. This activates the option buttons.

Create Count Sheet

SAVE UNDO **REFRESH** DELETE FIND RELATED ▾

Physical Inventory Manager

Location: FM AUTOMOTIVE - FLEET - PARKING ENF WESTERN

Option Buttons

Create Count Sheet Enter Count Variance Report Adjust Count

Physical Inventory Detail (Record 1 of 1)





| Phys Inv ID | Status | Status Date | Last Upload Amount | Last Upload Processed | Indirect Account | Method |
|-------------|-------------|---------------------|--------------------|-----------------------|------------------|-----------|
| 277 | In Progress | 08/15/2019 11:16:03 | 0 | 0 | | CYCLECODE |

The first step in the physical inventory process is to create the count sheet. Click the Create Count Sheet button to generate the report, sample below.

Physical Inventory Count Sheet

Fleet Services

Report Printed: 08/15/2019 11:18:25 By User:

| LINE NO. | PART NO. | PART DESCRIPTION | BIN | Units | COUNT |
|--|-------------------|--------------------------------|--|-------|-------|
| DOCUMENT NO: 277-1 | | COUNT: NEW |  | | |
| LOCATION: FM | | | | | |
| 1 | #52 | TEST | | EA | |
| <i>Alternate Bins:</i> | | | | | |
| 2 | 00-001 | TEST | 12B | EACH | |
|  | | | | | |
| <i>Alternate Bins:</i> | | | | | |
| 3 | 0000000000100084 | TV/VCR COMBINATION (BOROSCOPE) | | EA | |
|  | | | | | |
| <i>Alternate Bins:</i> | | | | | |
| 4 | 00000000001000845 | TEST W/ CORE | | EACH | |
|  | | | | | |
| <i>Alternate Bins:</i> | | | | | |
| 5 | 00000000001002955 | BOLT HEATER, RIGID, 460V, 0.5K | | EA | |
|  | | | | | |
| <i>Alternate Bins:</i> | | | | | |
| 6 | 0001PART | 0001 STOCK PART | | EACH | |

Enter Count

SAVE
UNDO
REFRESH
DELETE
FIND
RELATED ▾

Physical Inventory Enter Count

Physical Inventory Information

Employee ID: TOM test employee

Phy Inv ID - Page: 277 Status: Selected

Inventory Location: FM AUTOMOTIVE - FLEET - PARKING ENF WESTERN

Date

Date: 08/16/2019 07:34:38 Default as Count Date: Clear All Dates

Page links for document 277.

| | | | | | | | |
|----|----|----|----|----|----|----|----|
| 11 | 21 | 31 | 41 | 51 | 61 | 71 | 81 |
| 9 | 10 | 11 | 12 | 13 | 14 | | |
| 15 | 16 | 17 | 18 | 19 | 20 | | |
| 21 | 22 | 23 | 24 | 25 | 26 | | |
| 27 | 28 | 29 | 30 | 31 | 32 | | |
| 33 | 34 | 35 | | | | | |

+ Count Entry
Unresolved Counts

Parts on page 1 of document 277. (Loaded 20 records)

| Line | Part Number | Manufacturer | Description | Bin | Unit Issue | Unit Cost | Quantity Counted | Count Date |
|------|---------------------|--------------|--------------------------------|-----|------------|-----------|------------------|------------|
| 1 | #52 | BEN | TEST | | EA | \$0.00 | | |
| 2 | 00-001 | AL AUTO LITE | TEST | 12B | EA | \$0.00 | | |
| 3 | 000000000001000084 | BENDIX | TV/VCR COMBINATION (BOROSCOPE) | | EA | \$0.00 | | |
| 4 | 0000000000010000845 | 3-M | TEST W/ CORE | | EACH | \$15.00 | | |

Orange indicates pages to be counted and Cyan (greenish-blue) indicated pages that have already been counted.

After entering the counts, the status will change to: *Counted*.

Variance Report

After entering the count, click the Variance Report button. The status will change to *Variance Printed*.

The screenshot displays the 'Physical Inventory Manager' interface. At the top, there is a navigation bar with buttons for 'SAVE', 'UNDO', 'REFRESH', 'DELETE', 'FIND', and 'RELATED'. Below this, the title 'Physical Inventory Manager' is shown. A 'Location' field contains 'FM AUTOMOTIVE - FLEET - PARKING ENF WESTERN'. Under 'Option Buttons', there are four buttons: 'Create Count Sheet', 'Enter Count', 'Variance Report', and 'Adjust Count'. A red arrow points to the 'Variance Report' button. Below the buttons is a table titled 'Physical Inventory Detail (Record 1 of 1)'. The table has columns for 'Phys Inv ID', 'Status', 'Status Date', 'Last Upload Amount', 'Last Upload Processed', 'Indirect Account', and 'Method'. The first row shows '277' in the 'Phys Inv ID' column, 'Variance Printed' in the 'Status' column, '08/15/2019 11:16:03' in the 'Status Date' column, '0' in the 'Last Upload Amount' column, '0' in the 'Last Upload Processed' column, and 'CYCLECODE' in the 'Method' column. A red arrow points to the 'Variance Printed' status.

| Phys Inv ID | Status | Status Date | Last Upload Amount | Last Upload Processed | Indirect Account | Method |
|-------------|------------------|---------------------|--------------------|-----------------------|------------------|-----------|
| 277 | Variance Printed | 08/15/2019 11:16:03 | 0 | 0 | | CYCLECODE |

Sample output

| Physical Inventory Variance Summary | | | | | | | | | | | | | <i>Fleet Services</i> |
|--|-------------|-----|-------------|----------------|-------------------|---------------------|-------------------|----------|-----------|-----------|-----------|-------------------|-----------------------------------|
| Page No / Line | Cnt Stat | Bin | Employee No | Qty On Hand | Activity Since | Phys. Inv. Count | Count Variance | % Varies | Unit Cost | Old Value | New Value | Value Variance | |
| Location: FM - AUTOMOTIVE - FLEET - PARKING ENF WESTERN | | | | | | | | | | | | | |
| Part Number: #52 | | | | | | | | | | | | | Physical Inventory ID: 277 |
| 1 / 1 | R | | TOM | | | 3 | | | \$0.00 | | 0.00 | | |
| Part Total: | | | | 0 | 0 | 3 | 3 | 300.0% | 0.00 | 0.00 | 0.00 | 0.00 | |
| Part Number: 00000000001000084 - TV/VCR COMBINATION (BOROSCOPE) | | | | | | | | | | | | | Physical Inventory ID: 277 |
| 1 / 3 | R | | TOM | | | 0 | | | \$0.00 | | 0.00 | | |
| Part Total: | | | | 66 | 0 | 0 | -66 | -100.0% | 0.00 | 0.00 | 0.00 | 0.00 | |
| Part Number: 000000000010000845 | | | | | | | | | | | | | Physical Inventory ID: 277 |
| 1 / 4 | C | | TOM | | | 0 | | | \$15.00 | | 0.00 | | |
| Part Total: | | | | 0 | 0 | 0 | 0 | 0.0% | 0.00 | 0.00 | 0.00 | 0.00 | |
| Part Number: 00000000001002955 - BOLT HEATER, RIGID, 460V, 0.5K | | | | | | | | | | | | | Physical Inventory ID: 277 |
| 1 / 5 | R | | TOM | | | 0 | | | \$1.00 | | 0.00 | | |
| Part Total: | | | | 1 | 0 | 0 | -1 | -100.0% | 0.00 | 1.00 | 0.00 | -1.00 | |
| Part Number: 00-001 - TEST | | | | | | | | | | | | | Physical Inventory ID: 277 |
| 1 / 2 | R | 12B | TOM | | | 4 | | | \$0.00 | | 0.00 | | |

Adjust Inventory

Enter a valid Indirect Account code to make the Adjust Count button active.

The screenshot shows the 'Physical Inventory Manager' interface. At the top, there are buttons for 'SAVE', 'UNDO', 'REFRESH', 'DELETE', 'FIND', and 'RELATED'. Below these is the title 'Physical Inventory Manager'. A 'Location' field contains 'FM' and 'AUTOMOTIVE - FLEET - PARKING ENF WESTERN'. To the right, a 'Recount' section has radio buttons for 'Yes' (selected) and 'No'. Below this is an 'Option Buttons' section with 'Create Count Sheet', 'Enter Count', 'Variance Report', and 'Adjust Count' buttons. A table titled 'Physical Inventory Detail (Record 1 of 1)' is shown below, with columns: Phys Inv ID, Status, Status Date, Last Upload Amount, Last Upload Processed, Indirect Account, and Method. The table contains one row with values: 277, Variance Printed, 08/15/2019 11:16:03, 0, 0, INV, and CYCLECODE. Red arrows point to the 'Adjust Count' button and the 'INV' value in the table.

| Phys Inv ID | Status | Status Date | Last Upload Amount | Last Upload Processed | Indirect Account | Method |
|-------------|------------------|---------------------|--------------------|-----------------------|------------------|-----------|
| 277 | Variance Printed | 08/15/2019 11:16:03 | 0 | 0 | INV | CYCLECODE |



You can also enter an indirect account code and select 'Yes' from the recount section to perform a recount. This allows you to start from the beginning with creating a count sheet.

Click the Adjust Count button after you have finished adjusting the counts. The status will change to *Adjustment Scheduled* then *In Progress (Recount #)*.

SAVE UNDO REFRESH DELETE FIND RELATED ▾

Physical Inventory Manager

Location

Location: FM AUTOMOTIVE - FLEET - PARKING ENF WESTERN

Option Buttons

Create Count Sheet Enter Count Variance Report Adjust Count

Physical Inventory Detail (Record 1 of 1)

| Phys Inv ID | Status | Status Date | Last Upload Amount | Last Upload Processed | Indirect Account | Method |
|-------------|---------------------------|---------------------|--------------------|-----------------------|------------------|-----------|
| 277 | Adjustment Scheduled..... | 08/15/2019 11:16:03 | 0 | 0 | INV | CYCLECODE |

Viewing Results

You can use the following three screens to view the physical inventory results:

- Part Inventory Parameters
- Part Journal Query
- Part Inventory Location Manager

| Segment | Territory | VMF | COUNT OF EMPLOYEES | Date of Go-Live | Date of Training | |
|---------|-----------|---|--------------------|-----------------|------------------|--|
| P 1 | WP 4 | 928 - ANAHEIM VMF | 22 | 11/6/2023 | | |
| P 1.1 | WP 4 | 928 - ANAHEIM VMF | 22 | 1/29/2024 | | |
| 1 | WP 4 | 901 - LOS ANGELES VMF | 53 | 2/20/2024 | 2/12/2024 | |
| 1 | WP 8 | 921 - SAN DIEGO VMF | 50 | 2/20/2024 | 2/12/2024 | |
| 1 | WP 8 | 923 - HESPERIA AUX-OF SAN BERNARDINO | 4 | 2/20/2024 | 2/12/2024 | |
| 1 | WP 8 | 924 - SAN BERNARDINO VMF | 38 | 2/20/2024 | 2/12/2024 | |
| 1 | WP 8 | 919 - CHULA VISTA | | 2/20/2024 | 2/12/2024 | |
| 1 | WP 8 | 968 - HONOLULU VMF | 22 | 2/20/2024 | 2/12/2024 | |
| 1 | WP 4 | 927 - SANTA ANA (HUNTINGTON BEACH) VMF | 27 | 2/20/2024 | 2/12/2024 | |
| 1 | WP 4 | 905 - TORRANCE VMF | 12 | 2/20/2024 | 2/12/2024 | |
| 1 | WP 4 | 916 - POMONA VMF | 15 | 2/20/2024 | 2/12/2024 | |
| 1 | WP 4 | 929 - MISSION VIEJO (S. COUNTIES) VMF | 17 | 2/20/2024 | 2/12/2024 | |
| 1 | WP 4 | 911 - PASADENA VMF | 16 | 2/20/2024 | 2/12/2024 | |
| 1 | WP 4 | 917 - LA PUENTE VMF | 21 | 2/20/2024 | 2/12/2024 | |
| 2 | WP 1 | 981 - SEATTLE VMF | 23 | 3/11/2024 | 3/4/2024 | |
| 2 | WP 1 | 983 - FEDERAL WAY BMC AUX-OF SEATTLE | 3 | 3/11/2024 | 3/4/2024 | |
| 2 | WP 1 | 984 - TACOMA VMF | 22 | 3/11/2024 | 3/4/2024 | |
| 2 | WP 1 | 985 - LYNWOOD (NORTH) VMF | 17 | 3/11/2024 | 3/4/2024 | |
| 2 | WP 1 | 992 - SPOKANE VMF | 13 | 3/11/2024 | 3/4/2024 | |
| 2 | WP 1 | 993 - PASCO AUX-OF SPOKANE | 3 | 3/11/2024 | 3/4/2024 | |
| 2 | WP 1 | 996 - ANCHORAGE VMF | 8 | 3/11/2024 | 3/4/2024 | |
| 2 | WP 1 | 997 - FAIRBANKS AUX-OF ANCHORAGE | 2 | 3/11/2024 | 3/4/2024 | |
| 2 | WP 2 | 591 - BILLINGS VMF | 3 | 3/11/2024 | 3/4/2024 | |
| 2 | WP 2 | 802 - DENVER VMF | 27 | 3/11/2024 | 3/4/2024 | |
| 2 | WP 2 | 806 - DENVER SPRUCE VMF | 24 | 3/11/2024 | 3/4/2024 | |
| 2 | WP 2 | 809 - COLORADO SPRINGS VMF | 15 | 3/11/2024 | 3/4/2024 | |
| 2 | WP 2 | 815 - GRAND JUNCTION AUX-OF DENVER SPRU | 4 | 3/11/2024 | 3/4/2024 | |
| 2 | WP 2 | 837 - BOISE VMF | 10 | 3/11/2024 | 3/4/2024 | |
| 2 | WP 2 | 972 - PORTLAND, OR VMF | 34 | 3/11/2024 | 3/4/2024 | |
| 2 | WP 2 | 973 - SALEM VMF | 9 | 3/11/2024 | 3/4/2024 | |
| 2 | WP 2 | 974 - EUGENE VMF | 10 | 3/11/2024 | 3/4/2024 | |

| | | | | | | |
|---|------|--|----|-----------|----------|--|
| 2 | WP 3 | 841 - SALT LAKE CITY VMF | 12 | 3/11/2024 | 3/4/2024 | |
| 2 | WP 3 | 842 - SOUTH JORDAN VMF | 19 | 3/11/2024 | 3/4/2024 | |
| 2 | WP 3 | 844 - OGDEN AUX-OF SALT LAKE CITY | 9 | 3/11/2024 | 3/4/2024 | |
| 2 | WP 3 | 850 - PHOENIX VMF | 63 | 3/11/2024 | 3/4/2024 | |
| 2 | WP 3 | 857 - TUCSON VMF | 17 | 3/11/2024 | 3/4/2024 | |
| 2 | WP 3 | 871 - ALBUQUERQUE VMF | 19 | 3/11/2024 | 3/4/2024 | |
| 2 | WP 3 | 891 - LAS VEGAS VMF | 32 | 3/11/2024 | 3/4/2024 | |
| 2 | WP 3 | 895 - RENO VMF | 10 | 3/11/2024 | 3/4/2024 | |
| 2 | WP 5 | 914 - VAN NUYS VMF | 21 | 3/11/2024 | 3/4/2024 | |
| 2 | WP 5 | 915 - SANTA CLARITA VMF | 12 | 3/11/2024 | 3/4/2024 | |
| 2 | WP 5 | 931 - SANTA BARBARA VMF | 13 | 3/11/2024 | 3/4/2024 | |
| 2 | WP 5 | 933 - BAKERSFIELD VMF | 12 | 3/11/2024 | 3/4/2024 | |
| 2 | WP 5 | 934 - SAN LUIS OBISPO AUX-OF SANTA BARBARA | 2 | 3/11/2024 | 3/4/2024 | |
| 2 | WP 5 | 937 - FRESNO VMF | 18 | 3/11/2024 | 3/4/2024 | |
| 2 | WP 6 | 941 - SAN FRANCISCO VMF | 19 | 3/11/2024 | 3/4/2024 | |
| 2 | WP 6 | 944 - SAN MATEO VMF | 15 | 3/11/2024 | 3/4/2024 | |
| 2 | WP 6 | 949 - NORTH BAY VMF | 11 | 3/11/2024 | 3/4/2024 | |
| 2 | WP 6 | 952 - STOCKTON VMF | 16 | 3/11/2024 | 3/4/2024 | |
| 2 | WP 6 | 957 - W.SACRAMENTO VMF | 20 | 3/11/2024 | 3/4/2024 | |
| 2 | WP 6 | 958 - SACRAMENTO VMF | 21 | 3/11/2024 | 3/4/2024 | |
| 2 | WP 6 | 960 - REDDING AUX-OF SACRAMENTO | 7 | 3/11/2024 | 3/4/2024 | |
| 2 | WP 7 | 946 - OAKLAND VMF | 24 | 3/11/2024 | 3/4/2024 | |
| 2 | WP 7 | 947 - HAYWARD VMF | 12 | 3/11/2024 | 3/4/2024 | |
| 2 | WP 7 | 948 - WALNUT CREEK (EAST) VMF | 8 | 3/11/2024 | 3/4/2024 | |
| 2 | WP 7 | 951 - SAN JOSE VMF | 31 | 3/11/2024 | 3/4/2024 | |
| 3 | SO 2 | 321 - DAYTONA BEACH AUX-OF MID-FLORIDA | 8 | 4/8/2024 | | |
| 3 | SO 2 | 322 - JACKSONVILLE VMF | 32 | 4/8/2024 | | |
| 3 | SO 2 | 323 - TALLAHASSEE AUX-OF JACKSONVILLE | 5 | 4/8/2024 | | |
| 3 | SO 2 | 324 - PANAMA CITY AUX-OF PENSACOLA | 4 | 4/8/2024 | | |
| 3 | SO 2 | 325 - PENSACOLA VMF | 10 | 4/8/2024 | | |
| 3 | SO 2 | 326 - GAINESVILLE AUX-OF JACKSONVILLE | 10 | 4/8/2024 | | |
| 3 | SO 2 | 328 - ORLANDO VMF | 18 | 4/8/2024 | | |
| 3 | SO 2 | 329 - MELBOURNE VMF | 13 | 4/8/2024 | | |
| 3 | SO 2 | 332 - MID-FLORIDA VMF | 21 | 4/8/2024 | | |

| | | | | | | |
|---|------|--|----|----------|--|--|
| 3 | SO 2 | 336 - TAMPA VMF | 24 | 4/8/2024 | | |
| 3 | SO 2 | 337 - SAINT PETERSBURG VMF | 13 | 4/8/2024 | | |
| 3 | SO 2 | 338 - LAKELAND VMF | 13 | 4/8/2024 | | |
| 3 | SO 2 | 339 - FORT MYERS VMF | 17 | 4/8/2024 | | |
| 3 | SO 2 | 342 - SARASOTA VMF | 15 | 4/8/2024 | | |
| 3 | SO 2 | 346 - CLEARWATER VMF | 10 | 4/8/2024 | | |
| 3 | SO 3 | 007 - PONCE AUX-OF SAN JUAN | 5 | 4/8/2024 | | |
| 3 | SO 3 | 009 - SAN JUAN VMF | 19 | 4/8/2024 | | |
| 3 | SO 3 | 331 - MIAMI VMF | 44 | 4/8/2024 | | |
| 3 | SO 3 | 333 - FORT LAUDERDALE VMF | 32 | 4/8/2024 | | |
| 3 | SO 3 | 334 - WEST PALM BEACH VMF | 25 | 4/8/2024 | | |
| 3 | SO 3 | 349 - FT PIERCE AUX-OF WEST PALM | 9 | 4/8/2024 | | |
| 3 | SO 4 | 395 - GULFPORT AUX-OF NEW ORLEANS | 8 | 4/8/2024 | | |
| 3 | SO 4 | 701 - NEW ORLEANS VMF | 27 | 4/8/2024 | | |
| 3 | SO 4 | 702 - GRETNA AUX-OF NEW ORLEANS | 8 | 4/8/2024 | | |
| 3 | SO 4 | 705 - LAFAYETTE VMF AUX-OF BATON ROUGE | 7 | 4/8/2024 | | |
| 3 | SO 4 | 706 - LAKE CHARLES AUX-OF BATON ROUGE | 4 | 4/8/2024 | | |
| 3 | SO 4 | 708 - BATON ROUGE VMF | 12 | 4/8/2024 | | |
| 3 | SO 4 | 711 - SHREVEPORT VMF | 16 | 4/8/2024 | | |
| 3 | SO 4 | 713 - ALEXANDRIA, LA AUX-OF SHREVEPORT | 5 | 4/8/2024 | | |
| 3 | SO 4 | 722 - LITTLE ROCK VMF | 20 | 4/8/2024 | | |
| 3 | SO 4 | 731 - OKLAHOMA CITY VMF | 24 | 4/8/2024 | | |
| 3 | SO 4 | 735 - LAWTON AUX-OF OKLAHOMA CITY | 3 | 4/8/2024 | | |
| 3 | SO 4 | 741 - TULSA VMF | 22 | 4/8/2024 | | |
| 3 | SO 4 | 755 - TEXARKANA AUX-OF SHREVEPORT | 7 | 4/8/2024 | | |
| 3 | SO 7 | 782 - SAN ANTONIO VMF | 37 | 4/8/2024 | | |
| 3 | SO 7 | 787 - AUSTIN VMF | 19 | 4/8/2024 | | |
| 3 | SO 7 | 791 - AMARILLO AUX-OF LUBBOCK | 5 | 4/8/2024 | | |
| 3 | SO 7 | 794 - LUBBOCK VMF | 8 | 4/8/2024 | | |
| 3 | SO 7 | 797 - ODESSA AUX-OF LUBBOCK | 4 | 4/8/2024 | | |
| 3 | SO 7 | 799 - EL PASO VMF | 14 | 4/8/2024 | | |
| 3 | SO 8 | 771 - HOUSTON VMF | 35 | 4/8/2024 | | |
| 3 | SO 8 | 772 - HOUSTON (PARK PLACE) VMF | 21 | 4/8/2024 | | |
| 3 | SO 8 | 776 - HOUSTON (GREENS NORTH) VMF | 24 | 4/8/2024 | | |

| | | | | | | |
|---|------|--|----|-----------|--|--|
| 3 | SO 8 | 777 - BEAUMONT AUX-OF HOUSTON | 8 | 4/8/2024 | | |
| 3 | SO 8 | 778 - HOUSTON (BEAR CREEK) VMF | 21 | 4/8/2024 | | |
| 3 | SO 8 | 784 - CORPUS CHRISTI VMF | 12 | 4/8/2024 | | |
| 3 | SO 8 | 785 - MCALLEN VMF | 11 | 4/8/2024 | | |
| 4 | SO 1 | 288 - ASHEVILLE AUX-OF GREENVILLE | 6 | 4/29/2024 | | |
| 4 | SO 1 | 292 - COLUMBIA, SC VMF | 14 | 4/29/2024 | | |
| 4 | SO 1 | 293 - SPARTANBURG AUX-OF GREENVILLE | 4 | 4/29/2024 | | |
| 4 | SO 1 | 294 - CHARLESTON, SC VMF | 12 | 4/29/2024 | | |
| 4 | SO 1 | 295 - FLORENCE VMF AUX-OF COLUMBIA | 5 | 4/29/2024 | | |
| 4 | SO 1 | 296 - GREENVILLE VMF | 11 | 4/29/2024 | | |
| 4 | SO 1 | 301 - NORTH METRO VMF | 30 | 4/29/2024 | | |
| 4 | SO 1 | 302 - ATHENS AUX-OF NORTH METRO | 6 | 4/29/2024 | | |
| 4 | SO 1 | 303 - ATLANTA (BROADVIEW) AUX-OF NORTH M | 8 | 4/29/2024 | | |
| 4 | SO 1 | 304 - MARIETTA VMF | 25 | 4/29/2024 | | |
| 4 | SO 1 | 305 - NORCROSS VMF | 11 | 4/29/2024 | | |
| 4 | SO 1 | 306 - ATLANTA VMF | 38 | 4/29/2024 | | |
| 4 | SO 1 | 307 - ATLANTA (BMC) AUX-OF ATLANTA | 3 | 4/29/2024 | | |
| 4 | SO 1 | 308 - DECATUR AUX-OF ATLANTA | 9 | 4/29/2024 | | |
| 4 | SO 1 | 309 - WEST END AUX-OF ATLANTA | 6 | 4/29/2024 | | |
| 4 | SO 1 | 312 - MACON VMF | 8 | 4/29/2024 | | |
| 4 | SO 1 | 314 - SAVANNAH VMF | 8 | 4/29/2024 | | |
| 4 | SO 1 | 315 - WAYCROSS AUX-OF SAVANNAH | 3 | 4/29/2024 | | |
| 4 | SO 1 | 316 - AUGUSTA AUX-OF COLUMBIA | 8 | 4/29/2024 | | |
| 4 | SO 1 | 317 - ALBANY AUX-OF MACON | 6 | 4/29/2024 | | |
| 4 | SO 1 | 319 - COLUMBUS, GA AUX-OF MACON | 6 | 4/29/2024 | | |
| 4 | SO 5 | 352 - BIRMINGHAM VMF | 19 | 4/29/2024 | | |
| 4 | SO 5 | 356 - FLORENCE AUX-OF HUNTSVILLE | 3 | 4/29/2024 | | |
| 4 | SO 5 | 358 - HUNTSVILLE VMF | 11 | 4/29/2024 | | |
| 4 | SO 5 | 361 - MONTGOMERY VMF | 11 | 4/29/2024 | | |
| 4 | SO 5 | 363 - DOTHAN AUX-OF MONTGOMERY | 3 | 4/29/2024 | | |
| 4 | SO 5 | 366 - MOBILE VMF | 11 | 4/29/2024 | | |
| 4 | SO 5 | 372 - NASHVILLE VMF | 32 | 4/29/2024 | | |
| 4 | SO 5 | 374 - CHATTANOOGA VMF | 11 | 4/29/2024 | | |
| 4 | SO 5 | 376 - JOHNSON CITY AUX-OF KNOXVILLE | 7 | 4/29/2024 | | |

| | | | | | | |
|---|------|--|----|-----------|--|--|
| 4 | SO 5 | 379 - KNOXVILLE VMF | 15 | 4/29/2024 | | |
| 4 | SO 5 | 382 - MEMPHIS VMF | 22 | 4/29/2024 | | |
| 4 | SO 5 | 383 - MEMPHIS (BMC) AUX-OF MEMPHIS | 2 | 4/29/2024 | | |
| 4 | SO 5 | 387 - MEMPHIS (WHITE STATION) AUX-OF MEN | 8 | 4/29/2024 | | |
| 4 | SO 5 | 392 - JACKSON VMF | 10 | 4/29/2024 | | |
| 4 | SO 5 | 421 - BOWLING GREEN AUX-OF NASHVILLE | 3 | 4/29/2024 | | |
| 4 | SO 6 | 750 - COPPELL (NORTH TEXAS) VMF | 12 | 4/29/2024 | | |
| 4 | SO 6 | 751 - DALLAS VMF | 31 | 4/29/2024 | | |
| 4 | SO 6 | 753 - DALLAS (SPRING VALLEY) VMF | 14 | 4/29/2024 | | |
| 4 | SO 6 | 754 - GARLAND VMF | 16 | 4/29/2024 | | |
| 4 | SO 6 | 757 - TYLER VMF | 9 | 4/29/2024 | | |
| 4 | SO 6 | 761 - FORT WORTH VMF | 27 | 4/29/2024 | | |
| 4 | SO 6 | 762 - ARLINGTON VMF | 9 | 4/29/2024 | | |
| 4 | SO 6 | 763 - WICHITA FALLS AUX-OF FORT WORTH | 3 | 4/29/2024 | | |
| 4 | SO 6 | 767 - WACO AUX-OF FORT WORTH | 8 | 4/29/2024 | | |
| 4 | SO 6 | 769 - SAN ANGELO AUX-OF FORT WORTH | 2 | 4/29/2024 | | |
| 4 | SO 6 | 796 - ABILENE AUX-OF FORT WORTH | 3 | 4/29/2024 | | |
| 5 | AT 1 | 011 - SPRINGFIELD, MA VMF | 22 | 5/20/2024 | | |
| 5 | AT 1 | 012 - PITTSFIELD AUX-OF SPRINGFIELD | 3 | 5/20/2024 | | |
| 5 | AT 1 | 016 - WORCESTER VMF | 15 | 5/20/2024 | | |
| 5 | AT 1 | 017 - FRAMINGHAM VMF | 12 | 5/20/2024 | | |
| 5 | AT 1 | 019 - LYNN VMF | 19 | 5/20/2024 | | |
| 5 | AT 1 | 021 - CHELSEA AUX-OF BOSTON | 3 | 5/20/2024 | | |
| 5 | AT 1 | 022 - BOSTON VMF | 39 | 5/20/2024 | | |
| 5 | AT 1 | 023 - BROCKTON VMF | 21 | 5/20/2024 | | |
| 5 | AT 1 | 027 - FALL RIVER VMF | 13 | 5/20/2024 | | |
| 5 | AT 1 | 029 - PROVIDENCE VMF | 26 | 5/20/2024 | | |
| 5 | AT 5 | 106 - WESTCHESTER VMF | 30 | 5/20/2024 | | |
| 5 | AT 5 | 122 - ALBANY VMF | 26 | 5/20/2024 | | |
| 5 | AT 5 | 132 - SYRACUSE VMF | 21 | 5/20/2024 | | |
| 5 | AT 5 | 135 - UTICA AUX-OF ALBANY | 5 | 5/20/2024 | | |
| 5 | AT 5 | 139 - BINGHAMTON AUX-OF SYRACUSE | 5 | 5/20/2024 | | |
| 5 | AT 5 | 142 - BUFFALO VMF | 30 | 5/20/2024 | | |
| 5 | AT 5 | 146 - ROCHESTER VMF | 25 | 5/20/2024 | | |

| | | | | | | |
|---|------|--------------------------------------|----|-----------|--|--|
| 5 | AT 5 | 149 - ELMIRA AUX-OF ROCHESTER | 4 | 5/20/2024 | | |
| 5 | AT 7 | 202 - WASHINGTON, DC VMF | 29 | 5/20/2024 | | |
| 5 | AT 7 | 204 - RIVERDALE AUX-OF LARGO2 | 8 | 5/20/2024 | | |
| 5 | AT 7 | 205 - CAPITAL HEIGHTS (LARGO2) VMF | 13 | 5/20/2024 | | |
| 5 | AT 7 | 207 - CAPITOL HEIGHTS AUX-OF LARGO2 | 10 | 5/20/2024 | | |
| 5 | AT 7 | 208 - SUBURBAN VMF | 27 | 5/20/2024 | | |
| 5 | AT 7 | 212 - BALTIMORE VMF | 26 | 5/20/2024 | | |
| 5 | AT 7 | 213 - BALTIMORE (HALETHORPE) VMF | 14 | 5/20/2024 | | |
| 5 | AT 7 | 214 - BALTIMORE PARKVILLE VMF | 10 | 5/20/2024 | | |
| 5 | AT 7 | 215 - COLUMBIA, MD VMF | 18 | 5/20/2024 | | |
| 5 | AT 8 | 201 - DULLES VMF | 21 | 5/20/2024 | | |
| 5 | AT 8 | 221 - NORTHERN VIRGINIA VMF | 16 | 5/20/2024 | | |
| 5 | AT 8 | 223 - ALEXANDRIA AUX-OF NORTHERN VA | 3 | 5/20/2024 | | |
| 5 | AT 8 | 229 - CHARLOTTESVILLE VMF | 10 | 5/20/2024 | | |
| 5 | AT 8 | 232 - RICHMOND VMF | 24 | 5/20/2024 | | |
| 5 | AT 8 | 235 - NORFOLK VMF | 31 | 5/20/2024 | | |
| 5 | AT 8 | 236 - HAMPTON VMF | 11 | 5/20/2024 | | |
| 5 | AT 8 | 240 - ROANOKE VMF | 11 | 5/20/2024 | | |
| 5 | AT 8 | 245 - LYNCHBURG AUX-OF ROANOKE | 3 | 5/20/2024 | | |
| 5 | AT 8 | 271 - WINSTON SALEM VMF | 13 | 5/20/2024 | | |
| 5 | AT 8 | 274 - GREENSBORO VMF | 19 | 5/20/2024 | | |
| 5 | AT 8 | 276 - RALEIGH VMF | 34 | 5/20/2024 | | |
| 5 | AT 8 | 282 - CHARLOTTE VMF | 25 | 5/20/2024 | | |
| 5 | AT 8 | 283 - FAYETTEVILLE VMF | 18 | 5/20/2024 | | |
| 5 | AT 8 | 284 - WILMINGTON AUX-OF FAYETTEVILLE | 6 | 5/20/2024 | | |
| 5 | AT 8 | 286 - HICKORY AUX-OF CHARLOTTE | 4 | 5/20/2024 | | |
| 6 | AT 2 | 031 - MANCHESTER VMF | 28 | 6/10/2024 | | |
| 6 | AT 2 | 041 - PORTLAND, ME VMF | 23 | 6/10/2024 | | |
| 6 | AT 2 | 061 - HARTFORD VMF | 36 | 6/10/2024 | | |
| 6 | AT 2 | 065 - NEW HAVEN VMF | 26 | 6/10/2024 | | |
| 6 | AT 2 | 067 - WATERBURY VMF | 16 | 6/10/2024 | | |
| 6 | AT 2 | 069 - STAMFORD VMF | 18 | 6/10/2024 | | |
| 6 | AT 3 | 072 - KEARNY VMF | 18 | 6/10/2024 | | |
| 6 | AT 3 | 075 - PATERSON VMF | 14 | 6/10/2024 | | |

| | | | | | | |
|---|------|---|----|-----------|--|--|
| 6 | AT 3 | 076 - HACKENSACK VMF | 12 | 6/10/2024 | | |
| 6 | AT 3 | 081 - BELLMAWR VMF | 32 | 6/10/2024 | | |
| 6 | AT 3 | 086 - TRENTON VMF | 25 | 6/10/2024 | | |
| 6 | AT 3 | 087 - LAKEWOOD VMF | 18 | 6/10/2024 | | |
| 6 | AT 3 | 089 - EDISON VMF | 29 | 6/10/2024 | | |
| 6 | AT 4 | 101 - NEW YORK VMF | 49 | 6/10/2024 | | |
| 6 | AT 4 | 102 - NEW YORK (F.D.R.) AUX-OF NEW YORK | 14 | 6/10/2024 | | |
| 6 | AT 4 | 103 - STATEN ISLAND VMF | 11 | 6/10/2024 | | |
| 6 | AT 4 | 112 - BROOKLYN VMF | 27 | 6/10/2024 | | |
| 6 | AT 4 | 114 - QUEENS VMF | 40 | 6/10/2024 | | |
| 6 | AT 4 | 115 - WESTERN NASSAU VMF | 26 | 6/10/2024 | | |
| 6 | AT 4 | 118 - HICKSVILLE VMF | 44 | 6/10/2024 | | |
| 6 | AT 6 | 151 - WARRENDALE (BMC) AUX-OF PITTSBURG | 4 | 6/10/2024 | | |
| 6 | AT 6 | 152 - PITTSBURGH VMF | 31 | 6/10/2024 | | |
| 6 | AT 6 | 153 - WASHINGTON, PA VMF | 8 | 6/10/2024 | | |
| 6 | AT 6 | 154 - PITTSBURGH (GREENTREE) AUX-OF PITTS | 5 | 6/10/2024 | | |
| 6 | AT 6 | 155 - PITTSBURGH (PENN HILLS) AUX-OF PITTSB | 7 | 6/10/2024 | | |
| 6 | AT 6 | 156 - PITTSBURGH (EAST LIBERTY) AUX-OF PITT | 6 | 6/10/2024 | | |
| 6 | AT 6 | 159 - JOHNSTOWN AUX-OF WASHINGTON PA | 5 | 6/10/2024 | | |
| 6 | AT 6 | 165 - ERIE VMF | 12 | 6/10/2024 | | |
| 6 | AT 6 | 166 - ALTOONA AUX-OF WASHINGTON PA | 6 | 6/10/2024 | | |
| 6 | AT 6 | 171 - HARRISBURG VMF | 16 | 6/10/2024 | | |
| 6 | AT 6 | 176 - LANCASTER VMF | 11 | 6/10/2024 | | |
| 6 | AT 6 | 177 - WILLIAMSPORT AUX-OF HARRISBURG | 5 | 6/10/2024 | | |
| 6 | AT 6 | 181 - LEHIGH VALLEY VMF | 13 | 6/10/2024 | | |
| 6 | AT 6 | 185 - SCRANTON VMF | 11 | 6/10/2024 | | |
| 6 | AT 6 | 191 - PHILADELPHIA VMF | 25 | 6/10/2024 | | |
| 6 | AT 6 | 192 - PHILADELPHIA (BMC) AUX-OF PHILADELP | 4 | 6/10/2024 | | |
| 6 | AT 6 | 193 - SOUTHEASTERN VMF | 20 | 6/10/2024 | | |
| 6 | AT 6 | 194 - HUNT.PK/GERMANTOWN VMF | 13 | 6/10/2024 | | |
| 6 | AT 6 | 196 - READING AUX-OF LANCASTER | 7 | 6/10/2024 | | |
| 6 | AT 6 | 198 - WILMINGTON, DE VMF | 18 | 6/10/2024 | | |
| 6 | AT 6 | 260 - WHEELING AUX-OF WASHINGTON PA | 5 | 6/10/2024 | | |
| 7 | CE 1 | 253 - CHARLESTON, WV VMF | 11 | 7/15/2024 | | |

| | | | | | |
|---|------|--------------------------------------|----|-----------|--|
| 7 | CE 1 | 257 - HUNTINGTON AUX-OF CHARLESTON | 6 | 7/15/2024 | |
| 7 | CE 1 | 263 - CLARKSBURG AUX-OF CHARLESTON | 7 | 7/15/2024 | |
| 7 | CE 1 | 402 - LOUISVILLE VMF | 26 | 7/15/2024 | |
| 7 | CE 1 | 405 - LEXINGTON VMF | 15 | 7/15/2024 | |
| 7 | CE 1 | LONDON AUX-OF-LEXINGTON | | 7/15/2024 | |
| 7 | CE 1 | 462 - INDIANAPOLIS VMF | 33 | 7/15/2024 | |
| 7 | CE 1 | 463 - INDIANAPOLIS (NORA) VMF | 9 | 7/15/2024 | |
| 7 | CE 1 | 464 - GARY VMF | 12 | 7/15/2024 | |
| 7 | CE 1 | 466 - SOUTH BEND VMF | 10 | 7/15/2024 | |
| 7 | CE 1 | 468 - FORT WAYNE VMF | 9 | 7/15/2024 | |
| 7 | CE 1 | 473 - MUNCIE AUX-OF INDIANAPOLIS | 5 | 7/15/2024 | |
| 7 | CE 1 | 477 - EVANSVILLE VMF | 11 | 7/15/2024 | |
| 7 | CE 1 | 479 - LAFAYETTE AUX-OF INDIANAPOLIS | 3 | 7/15/2024 | |
| 7 | CE 3 | 482 - DETROIT VMF | 20 | 7/15/2024 | |
| 7 | CE 3 | 483 - PONTIAC VMF | 17 | 7/15/2024 | |
| 7 | CE 3 | 484 - DEARBORN VMF | 10 | 7/15/2024 | |
| 7 | CE 3 | 485 - FLINT VMF | 14 | 7/15/2024 | |
| 7 | CE 3 | 486 - SAGINAW VMF | 10 | 7/15/2024 | |
| 7 | CE 3 | 487 - LIVONIA VMF | 6 | 7/15/2024 | |
| 7 | CE 3 | 488 - ROYAL OAK VMF | 26 | 7/15/2024 | |
| 7 | CE 3 | 489 - LANSING VMF | 8 | 7/15/2024 | |
| 7 | CE 3 | 490 - KALAMAZOO VMF | 10 | 7/15/2024 | |
| 7 | CE 3 | 491 - ANN ARBOR VMF | 8 | 7/15/2024 | |
| 7 | CE 3 | 494 - MUSKEGON AUX-OF GRAND RAPIDS | 4 | 7/15/2024 | |
| 7 | CE 3 | 495 - GRAND RAPIDS VMF | 19 | 7/15/2024 | |
| 7 | CE 5 | 551 - SAINT PAUL VMF | 32 | 7/15/2024 | |
| 7 | CE 5 | 552 - BLOOMINGTON AUX-OF MINNEAPOLIS | 8 | 7/15/2024 | |
| 7 | CE 5 | 554 - MINNEAPOLIS VMF | 42 | 7/15/2024 | |
| 7 | CE 5 | 558 - DULUTH AUX-OF MINNEAPOLIS | 6 | 7/15/2024 | |
| 7 | CE 5 | 571 - SIOUX FALLS VMF | 3 | 7/15/2024 | |
| 7 | CE 6 | 601 - CAROL STREAM VMF | 32 | 7/15/2024 | |
| 7 | CE 6 | 602 - EVANSTON VMF | 6 | 7/15/2024 | |
| 7 | CE 6 | 609 - CHICAGO (WESTERN AVE) VMF | 13 | 7/15/2024 | |
| 7 | CE 6 | 611 - ROCKFORD VMF | 11 | 7/15/2024 | |

| | | | | | | |
|---|------|------------------------------------|----|-----------|--|--|
| 7 | CE 6 | 612 - CHICAGO VMF | 46 | 7/15/2024 | | |
| 8 | CE 2 | 161 - NEW CASTLE AUX-OF YOUNGSTOWN | 5 | 8/12/2024 | | |
| 8 | CE 2 | 436 - TOLEDO VMF | 20 | 8/12/2024 | | |
| 8 | CE 2 | 441 - CLEVELAND VMF | 21 | 8/12/2024 | | |
| 8 | CE 2 | 442 - SHAKER HEIGHTS VMF | 16 | 8/12/2024 | | |
| 8 | CE 2 | 443 - AKRON VMF | 19 | 8/12/2024 | | |
| 8 | CE 2 | 444 - WARREN AUX-OF YOUNGSTOWN | 4 | 8/12/2024 | | |
| 8 | CE 2 | 445 - YOUNGSTOWN VMF | 11 | 8/12/2024 | | |
| 8 | CE 2 | 446 - PARMA VMF | 22 | 8/12/2024 | | |
| 8 | CE 2 | 447 - CANTON VMF | 11 | 8/12/2024 | | |
| 8 | CE 2 | 449 - MANSFIELD AUX-OF AKRON | 6 | 8/12/2024 | | |
| 8 | CE 2 | 603 - FOREST PK (BMC) VMF | 13 | 8/12/2024 | | |
| 8 | CE 2 | 605 - AURORA VMF | 17 | 8/12/2024 | | |
| 8 | CE 2 | 608 - BEDFORD PARK VMF | 24 | 8/12/2024 | | |
| 8 | CE 2 | 616 - PEORIA VMF | 13 | 8/12/2024 | | |
| 8 | CE 2 | 618 - CHAMPAIGN VMF | 10 | 8/12/2024 | | |
| 8 | CE 2 | 627 - SPRINGFIELD, IL VMF | 12 | 8/12/2024 | | |
| 8 | CE 4 | 503 - DES MOINES VMF | 13 | 8/12/2024 | | |
| 8 | CE 4 | 511 - SIOUX CITY AUX-OF DES MOINES | 3 | 8/12/2024 | | |
| 8 | CE 4 | 524 - CEDAR RAPIDS VMF | 13 | 8/12/2024 | | |
| 8 | CE 4 | 532 - MILWAUKEE VMF | 39 | 8/12/2024 | | |
| 8 | CE 4 | 537 - MADISON VMF | 20 | 8/12/2024 | | |
| 8 | CE 4 | 543 - GREEN BAY VMF | 14 | 8/12/2024 | | |
| 8 | CE 4 | 681 - OMAHA VMF | 29 | 8/12/2024 | | |
| 8 | CE 4 | 685 - LINCOLN AUX-OF OMAHA | 4 | 8/12/2024 | | |
| 8 | CE 7 | 623 - QUINCY VMF | 4 | 8/12/2024 | | |
| 8 | CE 7 | 632 - ST LOUIS SOUTH COUNTY VMF | 32 | 8/12/2024 | | |
| 8 | CE 7 | 633 - ST LOUIS WEST COUNTY VMF | 39 | 8/12/2024 | | |
| 8 | CE 7 | 641 - KANSAS CITY VMF | 28 | 8/12/2024 | | |
| 8 | CE 7 | 662 - SHAWNEE MISSION VMF | 16 | 8/12/2024 | | |
| 8 | CE 7 | 666 - TOPEKA VMF | 7 | 8/12/2024 | | |
| 8 | CE 7 | 672 - WICHITA VMF | 12 | 8/12/2024 | | |
| 8 | CE 8 | 432 - COLUMBUS, OH VMF | 37 | 8/12/2024 | | |
| 8 | CE 8 | 451 - CINCINNATI (NORWOOD) VMF | 9 | 8/12/2024 | | |

| | | | | | | |
|---|------|-----------------------|----|-----------|--|--|
| 8 | CE 8 | 452 - CINCINNATI VMF | 30 | 8/12/2024 | | |
| 8 | CE 8 | 453 - SHARONVILLE VMF | 7 | 8/12/2024 | | |
| 8 | CE 8 | 454 - DAYTON VMF | 22 | 8/12/2024 | | |