M5 Report Basics

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M5 Report Basics

- Agenda
  - Introduction
  - Selecting A Report
  - Report Filters
  - Schedule a Report
  - View a Report
  - Report Maintenance
  - Initial Reports
  - Additional Information

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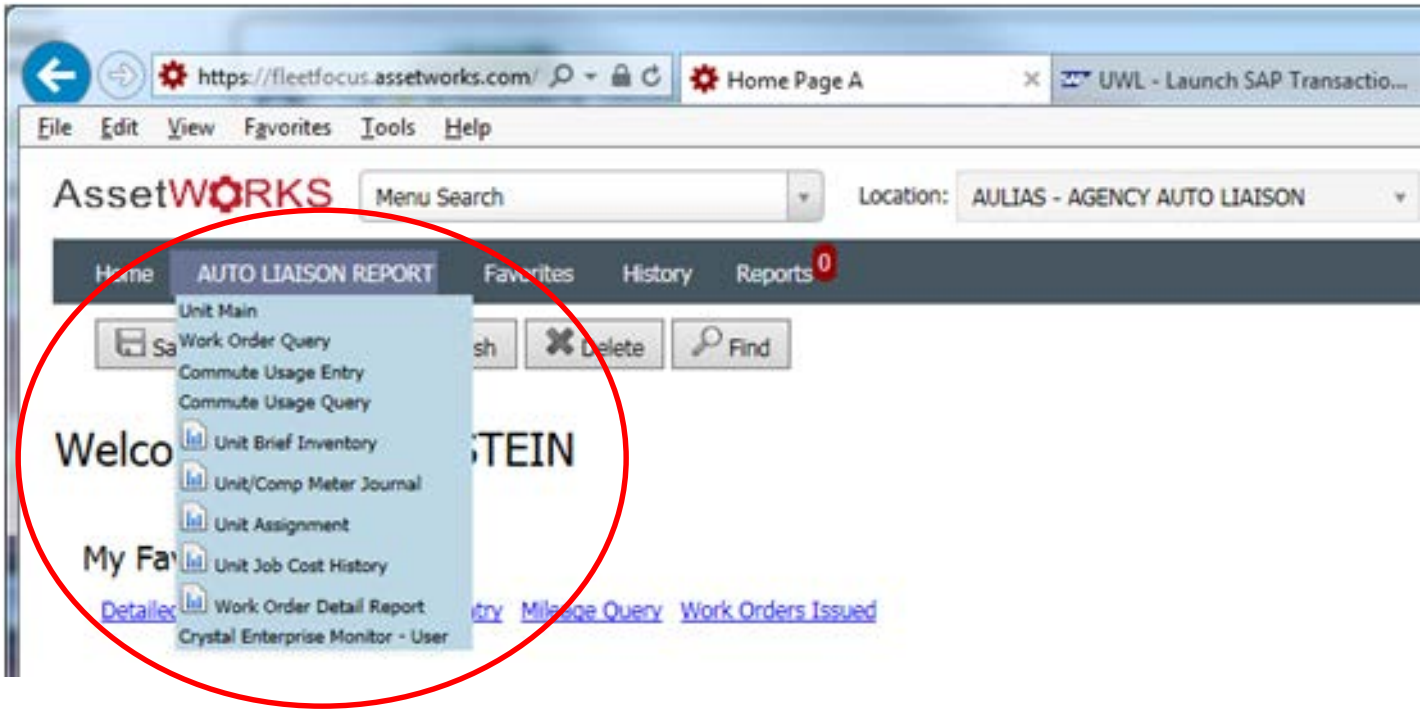
M5 Report Basics - Introduction

- Introduction
  - Reports are used to produce paper or electronic copies of information.
  - Each report has a bar graph icon to the left of its name and will have different report prompts and filters - levels of grouping similar data and sorting capability.

M5 Report Basics - Introduction



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M5 Report Basics - Introduction

- Report filters allow for the narrowing down of selections to specific information.
- When a report is scheduled, it is generated on a Report Server.
- Every agency shares this Report Server

M5 Report Basics – Introduction

- Report Formats
  - Excel
  - Excel tabular
  - Word
  - PDF
  - RTF
  - Text
  - Text (Tab Separated)

M5 Report Basics - Selection

- Select the report you are interested in generating by left-clicking on its name.

M5 Report Basics - Filters

- Each report has different report prompts available
  - Depending on the report, the prompts may allow you to use default values, group records together, sort the data, or change the layout of the report.

M5 Report Basics - Filters

- Grouping:
  - Level 1 Grouping – This level of grouping provides page breaks.
  - Level 2 Grouping – This level of grouping provides line breaks.

- Sorting:
  - Sort by – Sort Parameters sequence individual records in ascending order.

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M5 Report Basics - Filters

- Filters
  - Report filters are used to determine which records appear in reports.
  - Running a report without any filters will select all possible records.
    - DO NOT RUN A REPORT WITHOUT ANY FILTERS!
  - It is important to note that report filters *do not determine* what fields are on the detail line of the report.

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M5 Report Basics - Filters

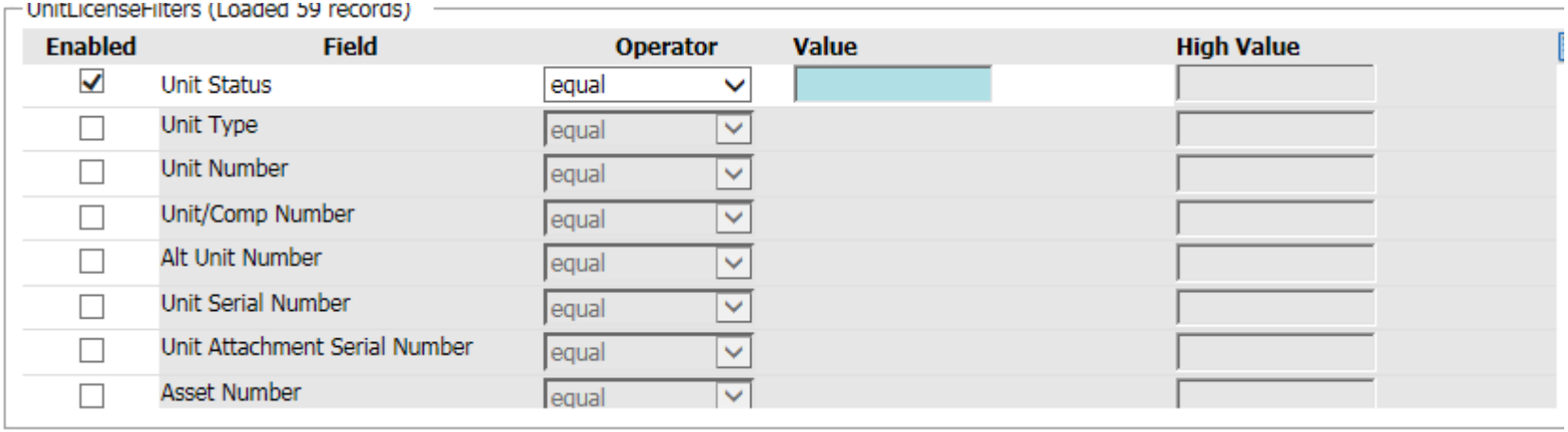
- Filters (continued)
  - Not all reports have the same report filters available.
  - The number of report filters available are shown in parentheses.
  - If there are more filters than can be shown on one page, use the vertical scroll bars to see the additional filters.

M5 Report Basics - Filters

- Filters (continued)
  - Selecting two or more filter creates an “AND” SQL statement and only selects records matching all filters.
  - Selecting too many filters can result in no data being selected.
  - There is No “OR” logic in M5 Standard Reports

M5 Report Basics - Filters

- Filters (continued)
  - In order to select a report filter - click in the box under the Enable Column. In our example, the Unit Status Filter box has been checked.



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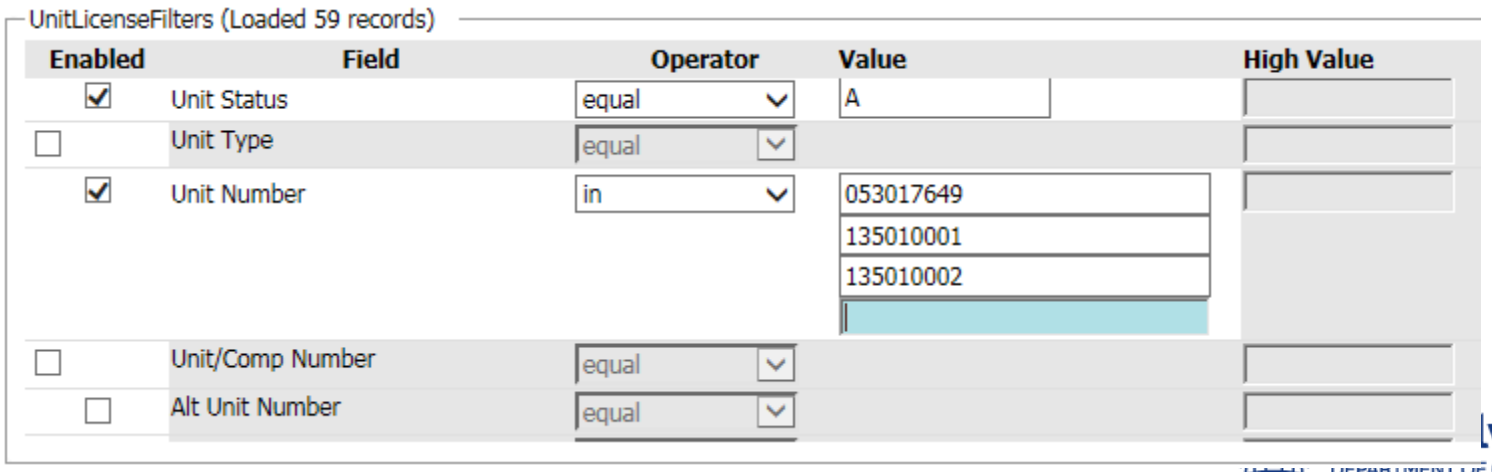
M5 Report Basics - Filters

- Operator
  - The purpose of operators is to provide more specific information.
  - These are used to test the entry in the value column.
  - If the value matches the operator – then the record is selected.

M5 Report Basics - Filters

- Operators (continued)
  - Is Equal To
    - The field must be exactly equal to what you specify in the Value Column.
  - Is One Of (In)
    - You can specify more than one item to compare to by adding multiple comparison items to a list. If the field is exactly equal to any of them, the record will be included.



M5 Report Basics - Filters

- Operators (continued)
  - Is Less Than/Greater Than
    - The field must be less than/greater than the item you're comparing to in the Value Column. If you are comparing numbers, the field must be smaller/larger numerically. If you are comparing dates, the field must be an earlier/later date. If you choose the Less/Greater Than Or Equal To option, the field can be equal to or less/greater than what you're comparing to.
  - Is Between
    - Allows you to select two items to create a comparison range. The field must be between, or equal to, the two items. Is Between uses the same type of comparison as is used with Is Less Than and Is Greater than: numbers compare numerically, dates compare chronologically, and strings compare alphabetically.

M5 Report Basics - Filters

- Operators (continued)
  - Is Like
    - You can look for partial text matches using wildcard characters to search for records that contain particular characters or groups of characters. When you specify your comparisons, you can use a question mark (**?**) to indicate that one character in the field at that position can contain anything. You can use a percent sign (**%**) to indicate that the rest of the field from that point on can contain anything.
    - Example:
      - Using Department Is Like: **10-25%** will return anything that that has “10-25xx” in the using department code

M5 Report Basics - Filters

- Value Column/High Value Column
  - Values are entered based on the record selection desired on the report.
  - When some operators such as between is used, it will require a second value. The high value column is used for that purpose.

M5 Report Basics - Filters

- Date Shortcuts (Current Day)
  - **TODAY**
    - *The current date beginning at 00:00:00 hours
  - **NOW**
    - *The current date and time. For example, 01-nov-1992, 13:24:32 hours.
  - **YESTERDAY**
    - *The day before today beginning at 00:00:00 hours.
  - **TOMORROW**
    - *The day after today beginning at 00:00:00 hours.
  - **BOD**
    - Beginning Of Current Day
  - **EOD**
    - End Of Current Day

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M5 Report Basics - Filters

- Date Shortcuts (Week)
  - **BLW**
    - Beginning Last Week, Sunday
  - **ELW**
    - End of Last Week
  - **BTW**
    - Beginning This Week, Sunday
  - **ETW**
    - End of This Week
  - **BNW**
    - Beginning of Next Week
  - **ENW**
    - End of Next Week

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M5 Report Basics - Filters

- Date Shortcuts (Month)
  - **BLM**
    - Beginning of Last Month
  - **ELM**
    - End of Last Month
  - **BTM**
    - Beginning of This Month
  - **ETM**
    - End of This Month
  - **BNM**
    - Beginning of Next Month
  - **ENM**
    - End of Next Month

M5 Report Basics - Filters

- Date Shortcuts (Year)
  - **BLY**
    - Beginning of Last (the previous) Year
  - **ELY**
    - End of Last Year
  - **BTY**
    - Beginning of This Year
  - **ETY**
    - End of This Year
  - **BNY**
    - Beginning of Next Year
  - **ENY**
    - End of Next Year

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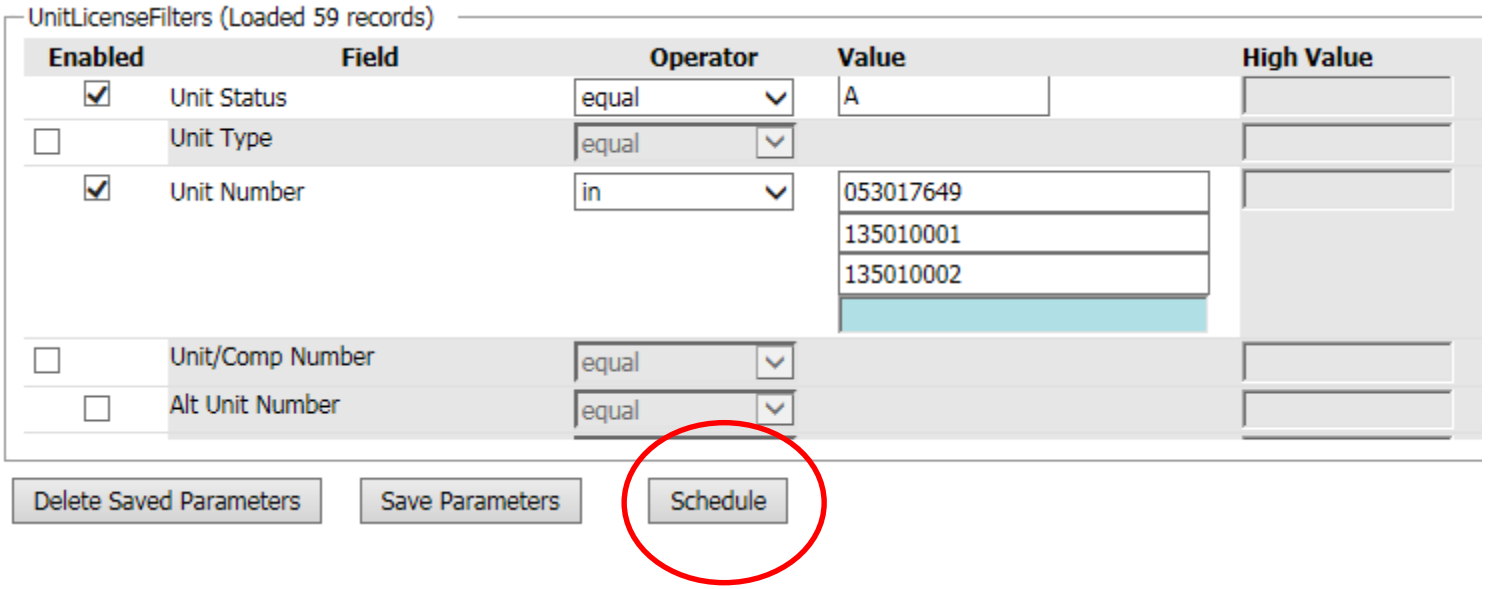
M5 Report Basics – Schedule

- Scheduling a Report
  - To schedule a report to be run, click on the Schedule button.



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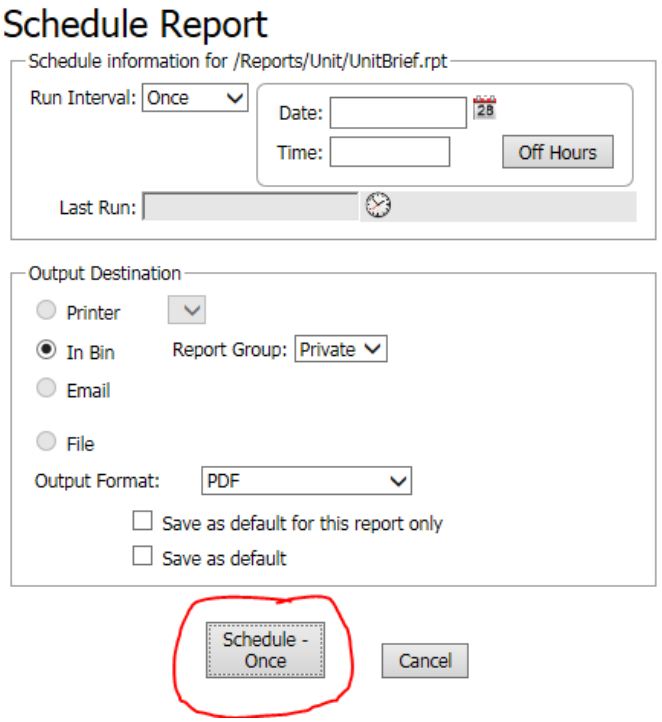
M5 Report Basics – Schedule

- Scheduling a Report
  - From the schedule report screen the following options are available:
    - run interval
    - output destination
    - output Type.

M5 Report Basics – Schedule

- Scheduling a Report
  - To generate the report immediately, click on the Schedule-Once button



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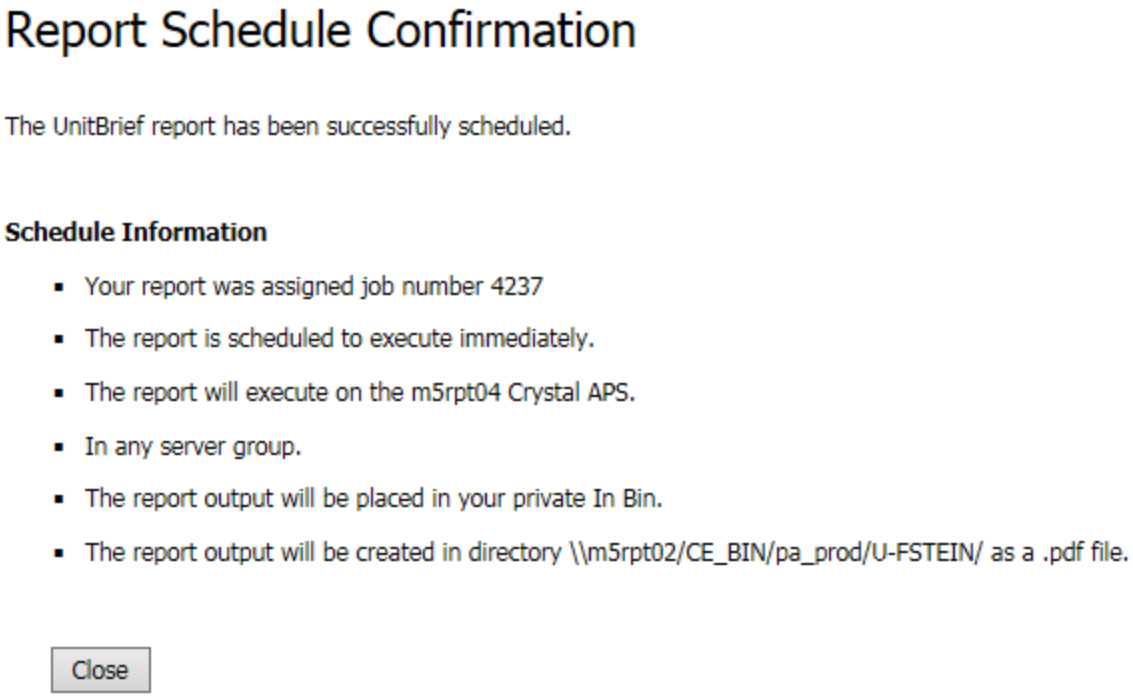
M5 Report Basics

- Report Schedule Confirmation



Report Schedule Confirmation

The UnitBrief report has been successfully scheduled.

Schedule Information

- Your report was assigned job number 4237
- The report is scheduled to execute immediately.
- The report will execute on the m5rpt04 Crystal APS.
- In any server group.
- The report output will be placed in your private In Bin.
- The report output will be created in directory \\m5rpt02/CE_BIN/pa_prod/U-FSTEIN/ as a .pdf file.

Close

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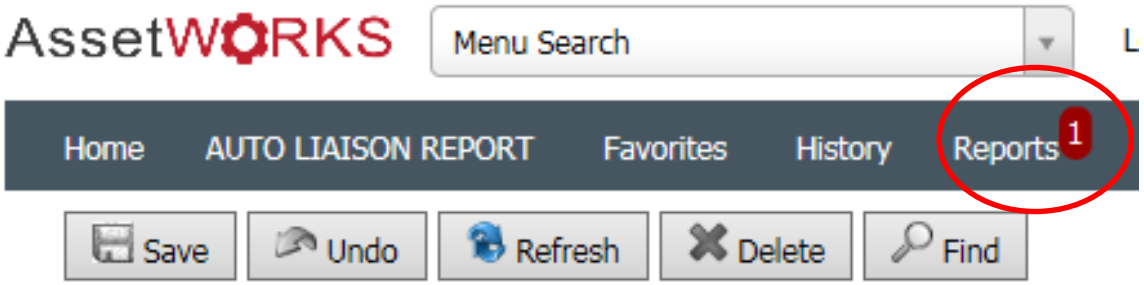
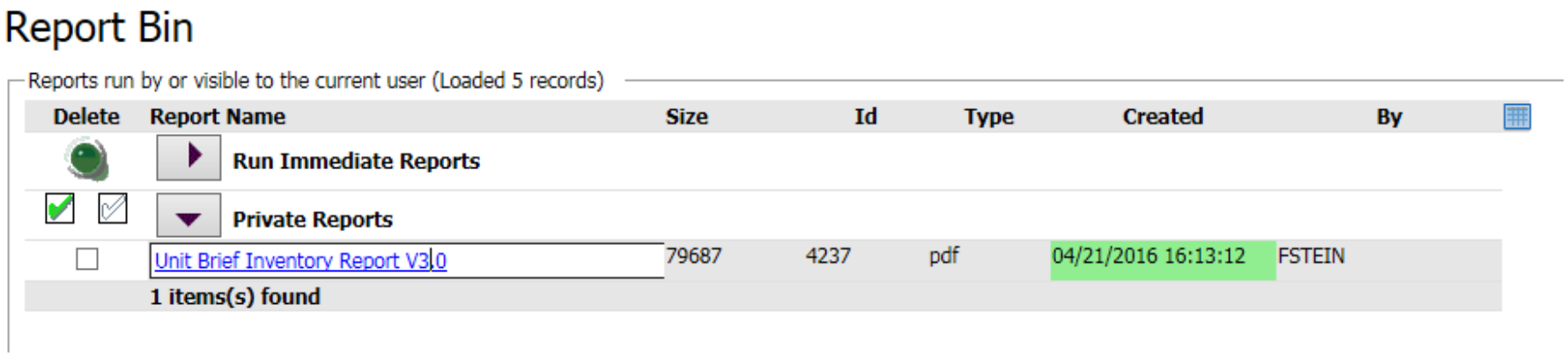
M5 Report Basics – View

- In Bin Reporting
  - Report is ready for review when there is a document in the In Bin.



M5 Report Basics - View

- Report Bin
  - Select the completed report to review.



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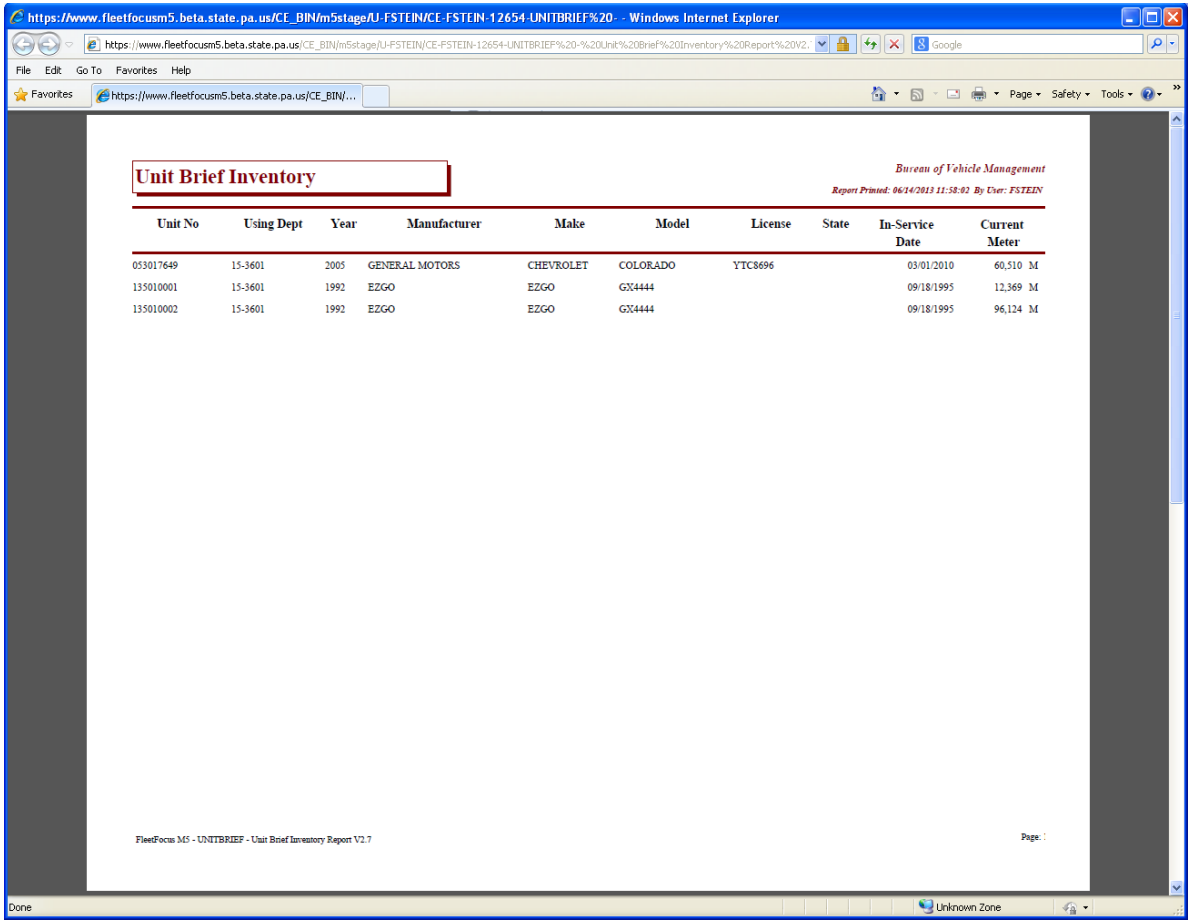
M5 Report Basics - View



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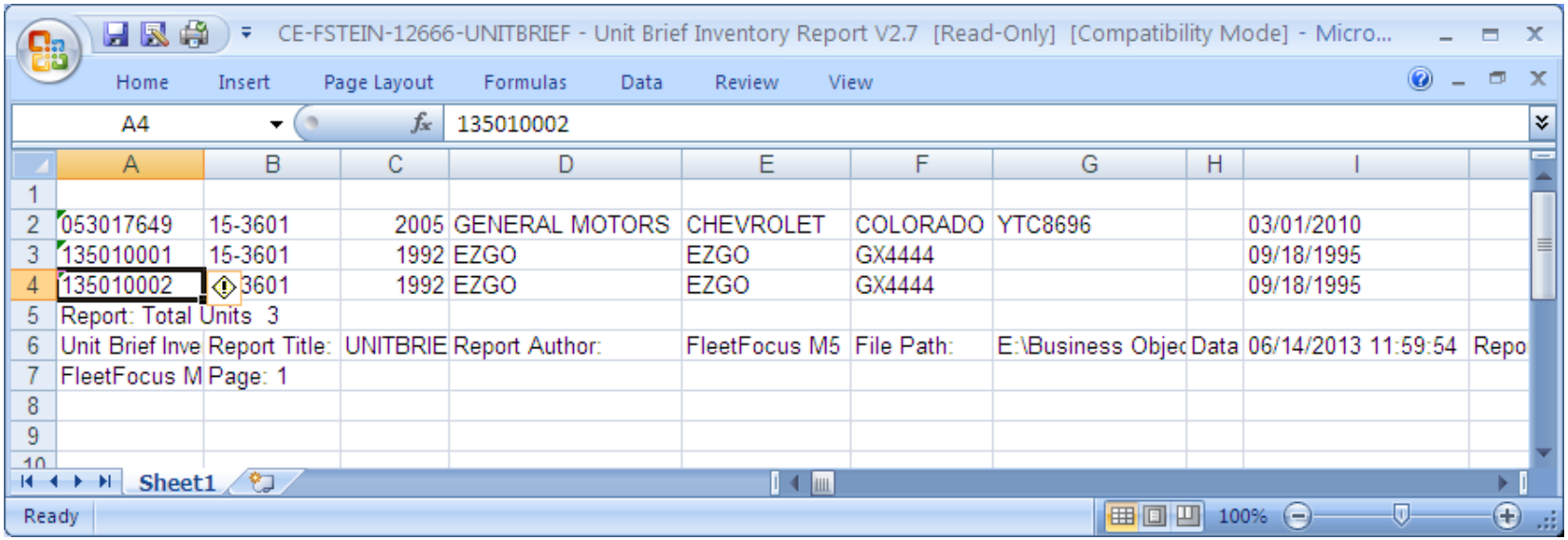
M5 Report Basics - View

- If output is Excel (Tabular), Column Headers are not displayed.



	A	B	C	D	E	F	G	H	I
1									
2	053017649	15-3601	2005	GENERAL MOTORS	CHEVROLET	COLORADO	YTC8696		03/01/2010
3	135010001	15-3601	1992	EZGO	EZGO	GX4444			09/18/1995
4	135010002	3601	1992	EZGO	EZGO	GX4444			09/18/1995
5	Report: Total Units 3								
6	Unit Brief Inve	Report Title:	UNITBRIE	Report Author:	FleetFocus M5	File Path:	E:\Business Objec	Data	06/14/2013 11:59:54
7	FleetFocus M	Page: 1							
8									
9									
10									

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M5 Report Basics – Maintenance

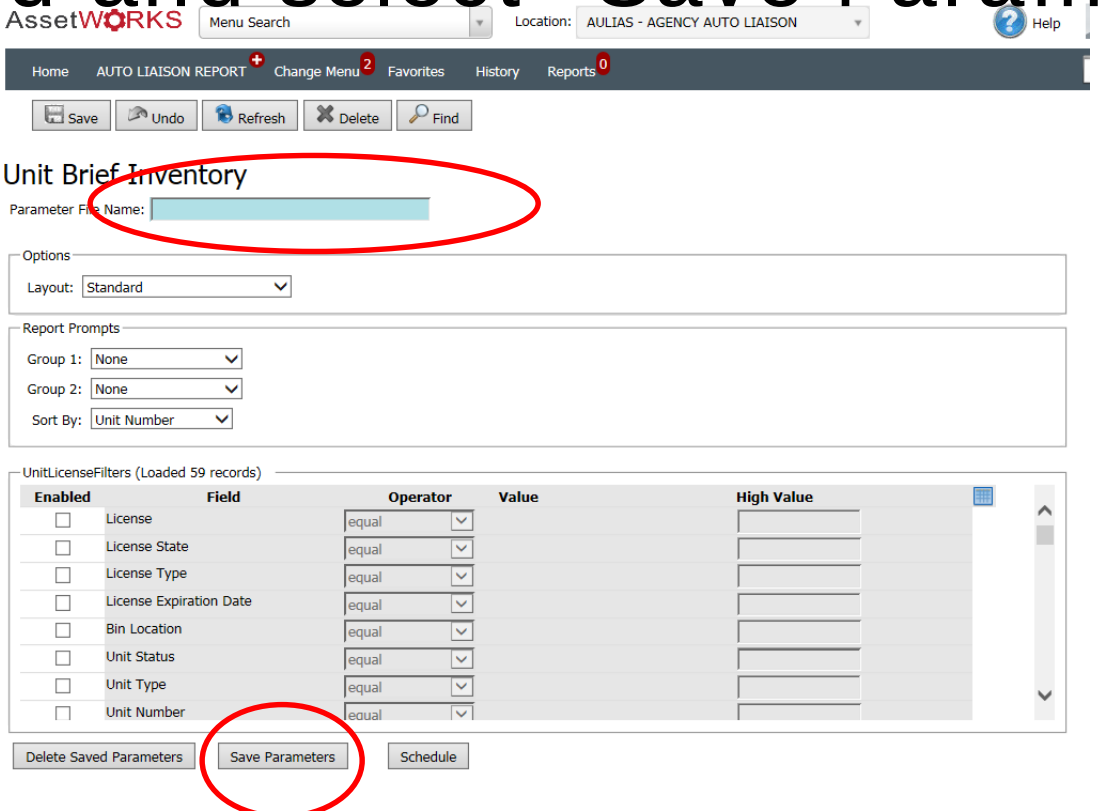
- Report Maintenance
  - Save a Report
  - Delete a Report
  - Schedule Run-Time or Recurring Reports
  - Deleting Older Report Results
  - Report Monitor

M5 Report Basics – Save

- Save a Report
  - Report parameters can be saved.
  - Reduces the need to re-enter filters, operators or date ranges for recurring reports.
  - Filters can be modified when the report is loaded.

M5 Report Basics - Save

- After inputting report filters, enter a name in the ‘Parameter File Name:’ field and select “Save Parameters”.



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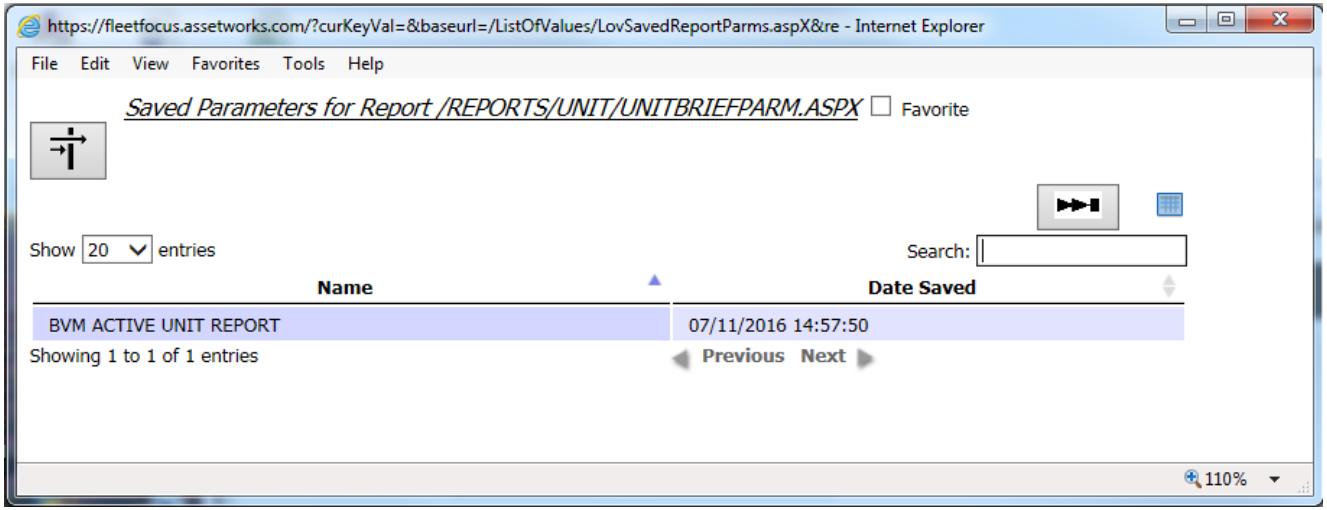
M5 Report Basics - Save

- To Rerun the report, “double-click” the Parameter File Name from the Report Menu and select the report to load.



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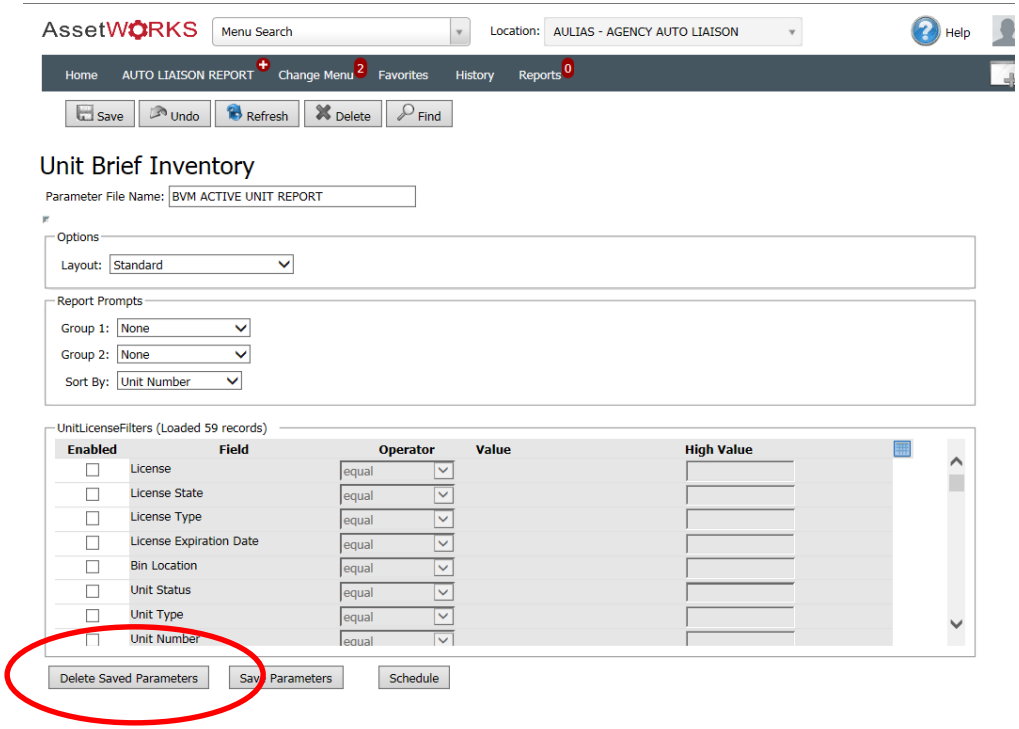
M5 Report Basics - Delete

- A saved report can be deleted by clicking on the “Delete Saved Parameters” Button.



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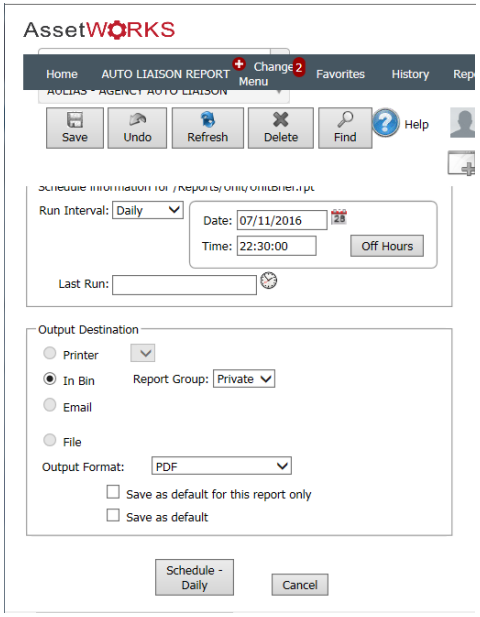
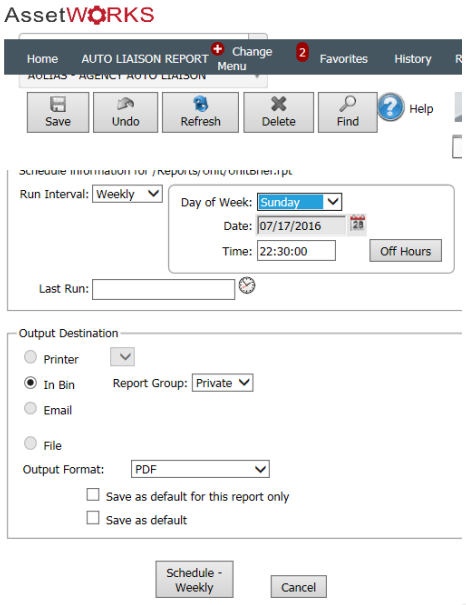
M5 Report Basics - Schedule

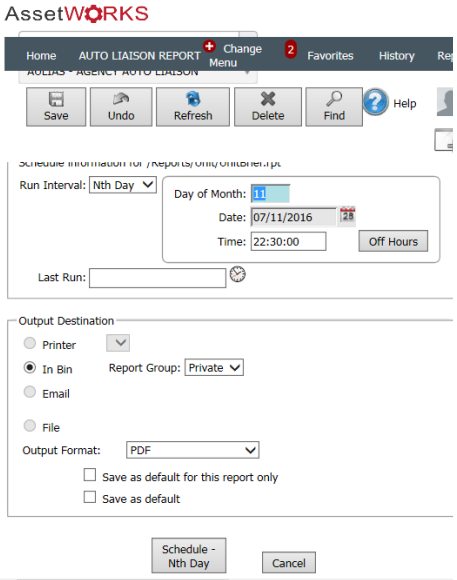
- Reports can be scheduled to execute automatically at different intervals.
  - Once - Immediately
  - Once at a specified later time
  - Daily
  - Weekly
  - On the ‘Nth’ Day of the month
  - Last Day of the month

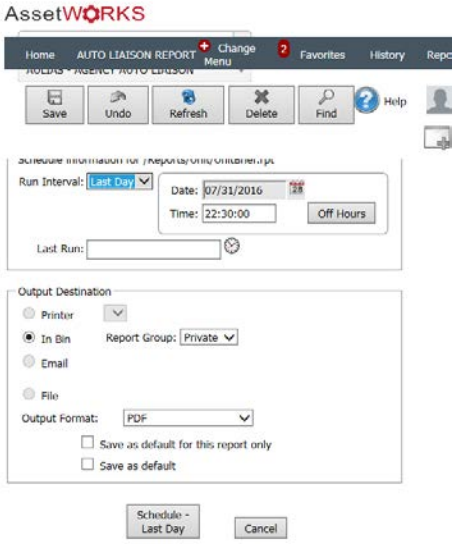
M5 Report Basics - Schedule

- Run Interval Examples









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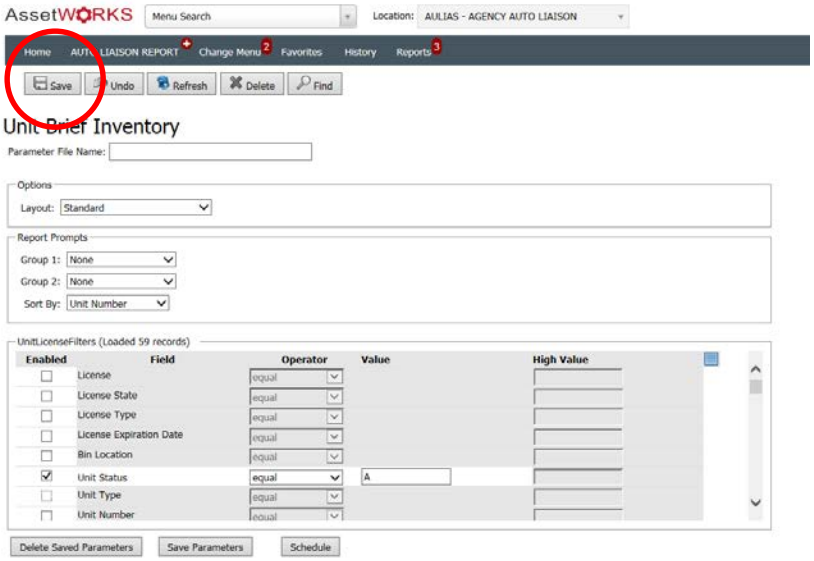
M5 Report Basics – Deleting Old Reports

- Old report results which are not deleted take up drive space, and will affect the performance of M5 for all users.
- Periodically, check the In-Bin for old reports no longer needed and delete the report.

M5 Report Basics – Deleting Old Reports

- To Delete Old Report
  - From the In-Bin, place a check in the check box next to the report you wish to delete.
  - Select the “Save” button.



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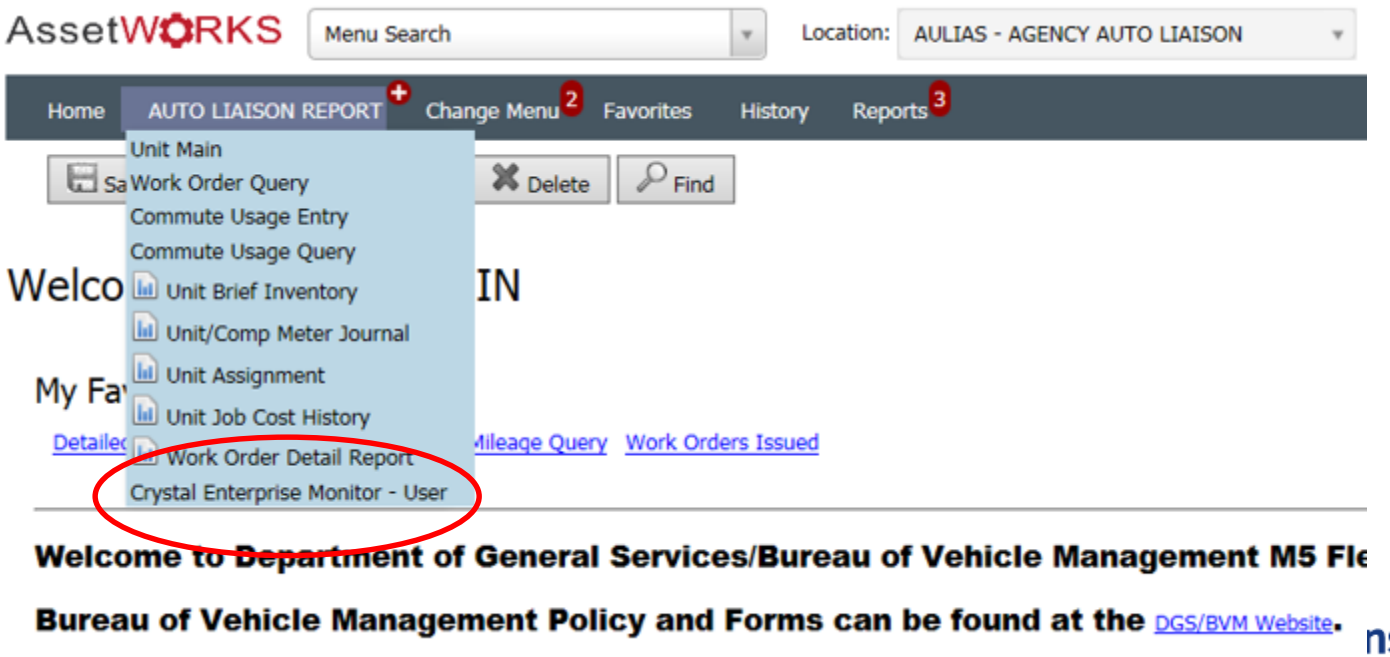
M5 Report Basics – Monitor

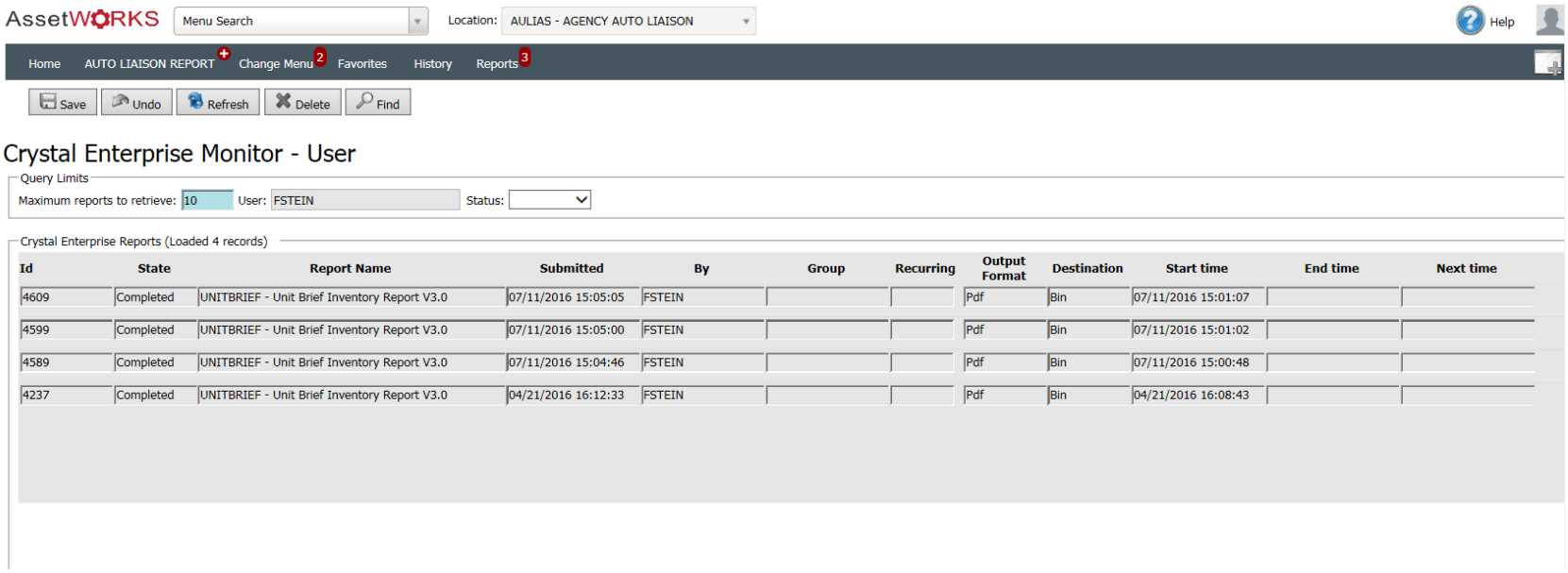
- To view the status of a report, select Reports Monitor from the M5 Desktop.



M5 Report Basics – Monitor

- This selection will display:
  - Executing Reports
  - Completed Reports
  - Failed Report
  - Recurring Reports
  - Pending Reports

M5 Report Basics - Monitor



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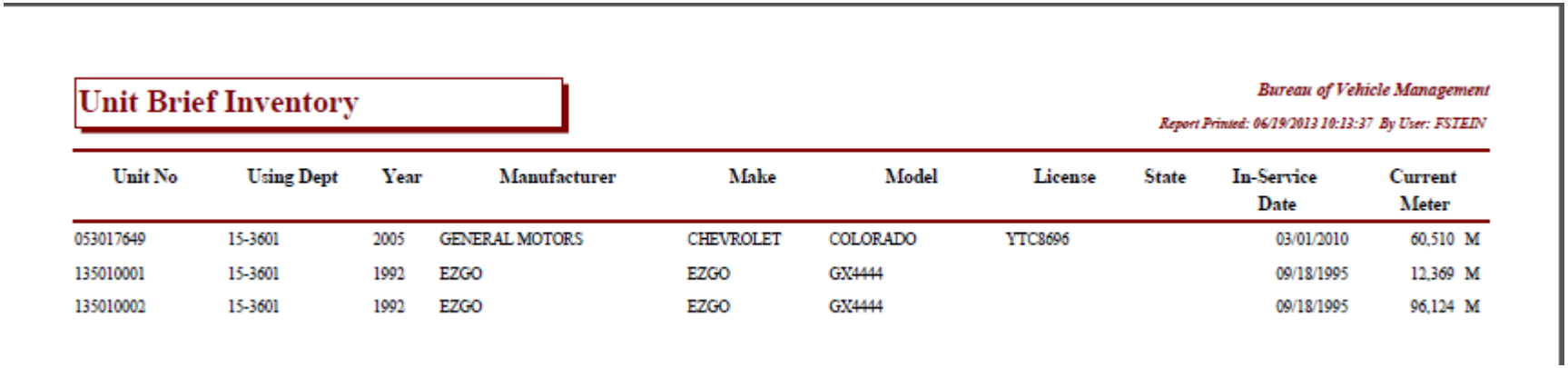
M5 Report Basics - Reports

- Unit Brief Inventory
  - Lists the year, make and model of the unit, the unit number, the in-service date and the current meter reading.



Unit Brief Inventory

Bureau of Vehicle Management

Report Printed: 06/19/2013 10:13:37 By User: FSTEIN

Unit No	Using Dept	Year	Manufacturer	Make	Model	License	State	In-Service Date	Current Meter
053017649	15-3601	2005	GENERAL MOTORS	CHEVROLET	COLORADO	YTC8696		03/01/2010	60,510 M
135010001	15-3601	1992	EZGO	EZGO	GX4444			09/18/1995	12,369 M
135010002	15-3601	1992	EZGO	EZGO	GX4444			09/18/1995	96,124 M

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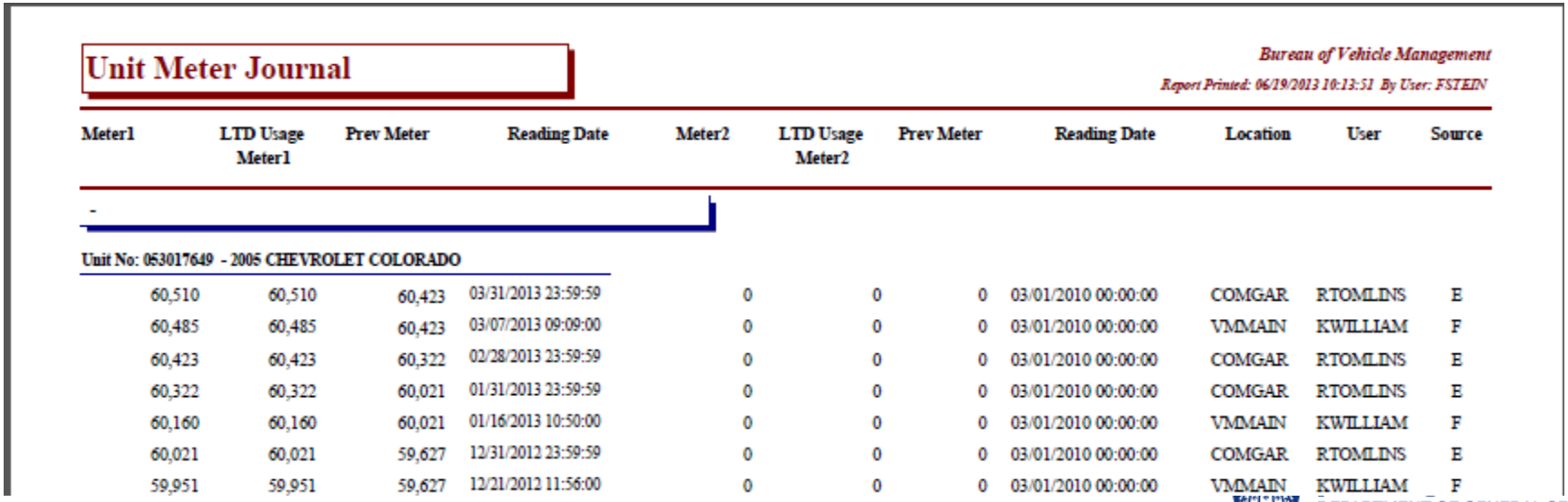
M5 Report Basics - Reports

- Unit Meter Journal
  - Lists the unit number, the current meter readings, the previous meter readings, the meter usages and the date of the meter readings.
    - Source:
      - E – Commute Usage Entry; F – Fuel Purchase; W – Work Order



Unit Meter Journal

Bureau of Vehicle Management

Report Printed: 06/19/2013 10:13:51 By User: FSTEIN

Unit No: 053017649 - 2005 CHEVROLET COLORADO

Meter1	LTD Usage Meter1	Prev Meter	Reading Date	Meter2	LTD Usage Meter2	Prev Meter	Reading Date	Location	User	Source
60,510	60,510	60,423	03/31/2013 23:59:59	0	0	0	03/01/2010 00:00:00	COMGAR	RTOMLINS	E
60,485	60,485	60,423	03/07/2013 09:09:00	0	0	0	03/01/2010 00:00:00	VMMAIN	KWILLIAM	F
60,423	60,423	60,322	02/28/2013 23:59:59	0	0	0	03/01/2010 00:00:00	COMGAR	RTOMLINS	E
60,322	60,322	60,021	01/31/2013 23:59:59	0	0	0	03/01/2010 00:00:00	COMGAR	RTOMLINS	E
60,160	60,160	60,021	01/16/2013 10:50:00	0	0	0	03/01/2010 00:00:00	VMMAIN	KWILLIAM	F
60,021	60,021	59,627	12/31/2012 23:59:59	0	0	0	03/01/2010 00:00:00	COMGAR	RTOMLINS	E
59,951	59,951	59,627	12/21/2012 11:56:00	0	0	0	03/01/2010 00:00:00	VMMAIN	KWILLIAM	F

M5 Report Basics - Reports

- Unit Assignment
  - List Owning and Using Department; Maintenance, Parking Locations; Activity Code and the Operator.

Unit Assignment

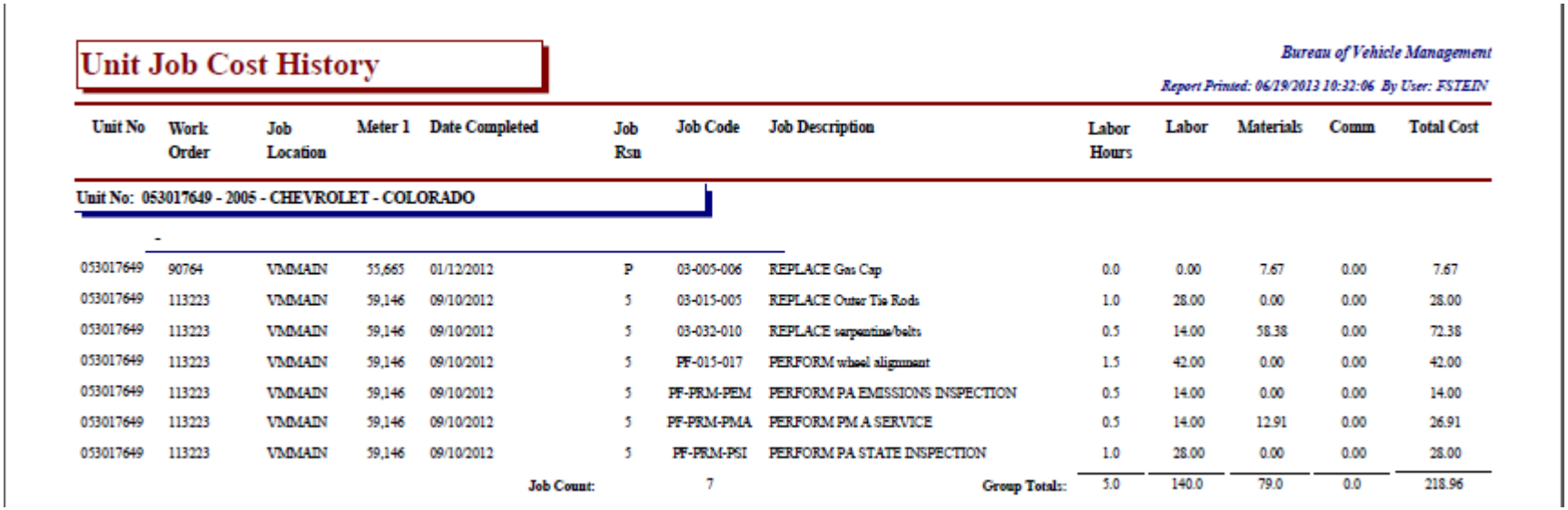
Bureau of Vehicle Management

Report Printed: 06/19/2013 10:14:00 By User: FSTEIN

Unit Number	Alt. Unit No.	Owning Department	Using Department	Parking Loc	Maint. Loc	Fueling Loc	Activity	Operational Class	Operator
053017649		15-3601	15-3601	COMGAR	VMMAIN		PASS		POOL TOMLINSON RAND
135010001		15-3601	15-3601	COMGAR	VMMAIN		NONPASS		POOL TOMLINSON RAND
135010002		15-3601	15-3601	COMGAR	VMMAIN		NONPASS		POOL TOMLINSON RAND

M5 Report Basics - Reports

- Unit Job Cost History
  - Listing by unit, the work order, meter reading, date completed, job code and description, labor hours, parts, commercial and total costs.



Unit Job Cost History

Bureau of Vehicle Management

Report Printed: 06/19/2013 10:32:06 By User: FSTEIN

Unit No	Work Order	Job Location	Meter 1	Date Completed	Job Rsn	Job Code	Job Description	Labor Hours	Labor	Materials	Comm	Total Cost
Unit No: 053017649 - 2005 - CHEVROLET - COLORADO												
053017649	90764	VMMAIN	55,665	01/12/2012	P	03-005-006	REPLACE Gas Cap	0.0	0.00	7.67	0.00	7.67
053017649	113223	VMMAIN	59,146	09/10/2012	5	03-015-005	REPLACE Outer Tie Rods	1.0	28.00	0.00	0.00	28.00
053017649	113223	VMMAIN	59,146	09/10/2012	5	03-032-010	REPLACE serpentine/belts	0.5	14.00	58.38	0.00	72.38
053017649	113223	VMMAIN	59,146	09/10/2012	5	PF-015-017	PERFORM wheel alignment	1.5	42.00	0.00	0.00	42.00
053017649	113223	VMMAIN	59,146	09/10/2012	5	PF-PRM-PEM	PERFORM PA EMISSIONS INSPECTION	0.5	14.00	0.00	0.00	14.00
053017649	113223	VMMAIN	59,146	09/10/2012	5	PF-PRM-PMA	PERFORM PM A SERVICE	0.5	14.00	12.91	0.00	26.91
053017649	113223	VMMAIN	59,146	09/10/2012	5	PF-PRM-PSI	PERFORM PA STATE INSPECTION	1.0	28.00	0.00	0.00	28.00
				Job Count:		7	**Group Totals::**	5.0	140.0	79.0	0.0	218.96

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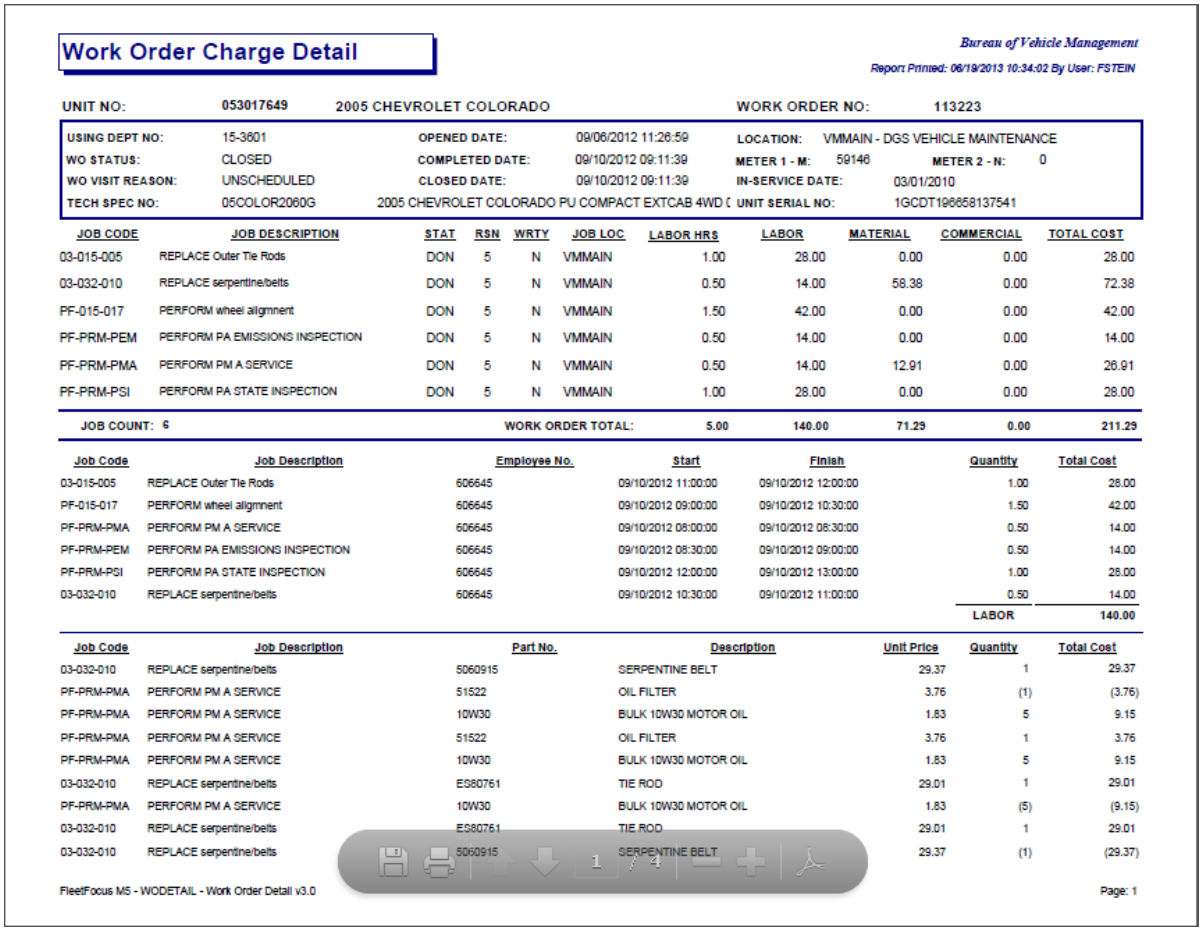
M5 Report Basics - Reports

- Work Order Detail
  - Listing by unit number and work order number, any costs and labor involved are also printed. A total for each job is calculated
  - Labor and Parts are only reported on work orders performed at the state garage
  - Any notes the CSD Division or the state garage attach to the work order will also be printed on this report

M5 Report Basics - Reports

- Work Order Detail



Work Order Charge Detail

Bureau of Vehicle Management

Report Printed: 06/19/2013 10:34:02 By User: FSTEIN

UNIT NO: 053017649 2005 CHEVROLET COLORADO **WORK ORDER NO:** 113223

USING DEPT NO:	15-3601	OPENED DATE:	09/06/2012 11:26:59	LOCATION:	VMMAIN - DGS VEHICLE MAINTENANCE
WO STATUS:	CLOSED	COMPLETED DATE:	09/10/2012 09:11:39	METER 1 - M: 59146	METER 2 - N: 0
WO VISIT REASON:	UNSCHEDULED	CLOSED DATE:	09/10/2012 09:11:39	IN-SERVICE DATE:	03/01/2010
TECH SPEC NO:	05COLOR2060G	2005 CHEVROLET COLORADO PU COMPACT EXTCAB 4WD (		UNIT SERIAL NO:	1GCDT196658137541

JOB CODE	JOB DESCRIPTION	STAT	RSN	WRTY	JOB LOC	LABOR HRS	LABOR	MATERIAL	COMMERCIAL	TOTAL COST
03-015-005	REPLACE Outer Tie Rods	DON	5	N	VMMAIN	1.00	28.00	0.00	0.00	28.00
03-032-010	REPLACE serpentine/belts	DON	5	N	VMMAIN	0.50	14.00	58.38	0.00	72.38
PF-015-017	PERFORM wheel allgmnent	DON	5	N	VMMAIN	1.50	42.00	0.00	0.00	42.00
PF-PRM-PEM	PERFORM PA EMISSIONS INSPECTION	DON	5	N	VMMAIN	0.50	14.00	0.00	0.00	14.00
PF-PRM-PMA	PERFORM PM A SERVICE	DON	5	N	VMMAIN	0.50	14.00	12.91	0.00	26.91
PF-PRM-PSI	PERFORM PA STATE INSPECTION	DON	5	N	VMMAIN	1.00	28.00	0.00	0.00	28.00
JOB COUNT: 6					WORK ORDER TOTAL:	5.00	140.00	71.29	0.00	211.29

Job Code	Job Description	Employee No.	Start	Finish	Quantity	Total Cost
03-015-005	REPLACE Outer Tie Rods	606645	09/10/2012 11:00:00	09/10/2012 12:00:00	1.00	28.00
PF-015-017	PERFORM wheel alignment	606645	09/10/2012 09:00:00	09/10/2012 10:30:00	1.50	42.00
PF-PRM-PMA	PERFORM PM A SERVICE	606645	09/10/2012 08:00:00	09/10/2012 08:30:00	0.50	14.00
PF-PRM-PEM	PERFORM PA EMISSIONS INSPECTION	606645	09/10/2012 08:30:00	09/10/2012 09:00:00	0.50	14.00
PF-PRM-PSI	PERFORM PA STATE INSPECTION	606645	09/10/2012 12:00:00	09/10/2012 13:00:00	1.00	28.00
03-032-010	REPLACE serpentine/belts	606645	09/10/2012 10:30:00	09/10/2012 11:00:00	0.50	14.00
					LABOR	140.00

Job Code	Job Description	Part No.	Description	Unit Price	Quantity	Total Cost
03-032-010	REPLACE serpentine/belts	5060915	SERPENTINE BELT	29.37	1	29.37
PF-PRM-PMA	PERFORM PM A SERVICE	51522	OIL FILTER	3.76	(1)	(3.76)
PF-PRM-PMA	PERFORM PM A SERVICE	10W30	BULK 10W30 MOTOR OIL	1.83	5	9.15
PF-PRM-PMA	PERFORM PM A SERVICE	51522	OIL FILTER	3.76	1	3.76
PF-PRM-PMA	PERFORM PM A SERVICE	10W30	BULK 10W30 MOTOR OIL	1.83	5	9.15
03-032-010	REPLACE serpentine/belts	ES80761	TIE ROD	29.01	1	29.01
PF-PRM-PMA	PERFORM PM A SERVICE	10W30	BULK 10W30 MOTOR OIL	1.83	(5)	(9.15)
03-032-010	REPLACE serpentine/belts	ES80761	TIE ROD	29.01	1	29.01
03-032-010	REPLACE serpentine/belts	5060915	SERPENTINE BELT	29.37	(1)	(29.37)

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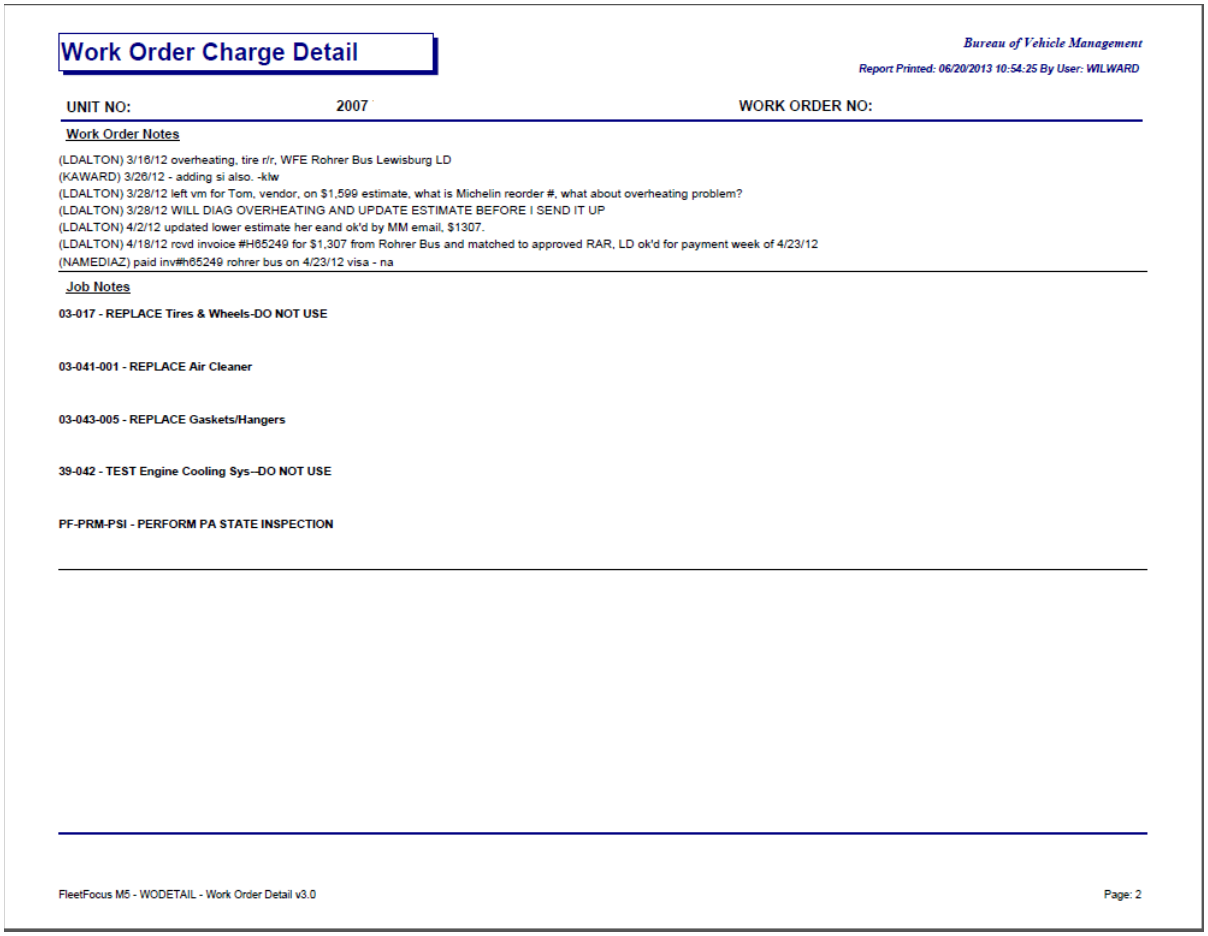
DEPARTMENT OF GENERAL SERVICES

M5 Report Basics - Reports

- Work Order Detail



Work Order Charge Detail

Bureau of Vehicle Management

Report Printed: 06/20/2013 10:54:25 By User: WILWARD

UNIT NO: 2007 WORK ORDER NO:

Work Order Notes

(LDALTON) 3/16/12 overheating, tire r/r, WFE Rohrer Bus Lewisburg LD
(KAWARD) 3/26/12 - adding si also. -klw
(LDALTON) 3/28/12 left vm for Tom, vendor, on $1,599 estimate, what is Michelin reorder #, what about overheating problem?
(LDALTON) 3/28/12 WILL DIAG OVERHEATING AND UPDATE ESTIMATE BEFORE I SEND IT UP
(LDALTON) 4/2/12 updated lower estimate her eand ok'd by MM email, $1307.
(LDALTON) 4/18/12 rcvd invoice #H65249 for $1,307 from Rohrer Bus and matched to approved RAR, LD ok'd for payment week of 4/23/12
(NAMEDIAZ) paid inv#h65249 rohrer bus on 4/23/12 visa - na

Job Notes

03-017 - REPLACE Tires & Wheels-DO NOT USE

03-041-001 - REPLACE Air Cleaner

03-043-005 - REPLACE Gaskets/Hangers

39-042 - TEST Engine Cooling Sys--DO NOT USE

PF-PRM-PSI - PERFORM PA STATE INSPECTION

FleetFocus M5 - WODETAIL - Work Order Detail v3.0 Page: 2

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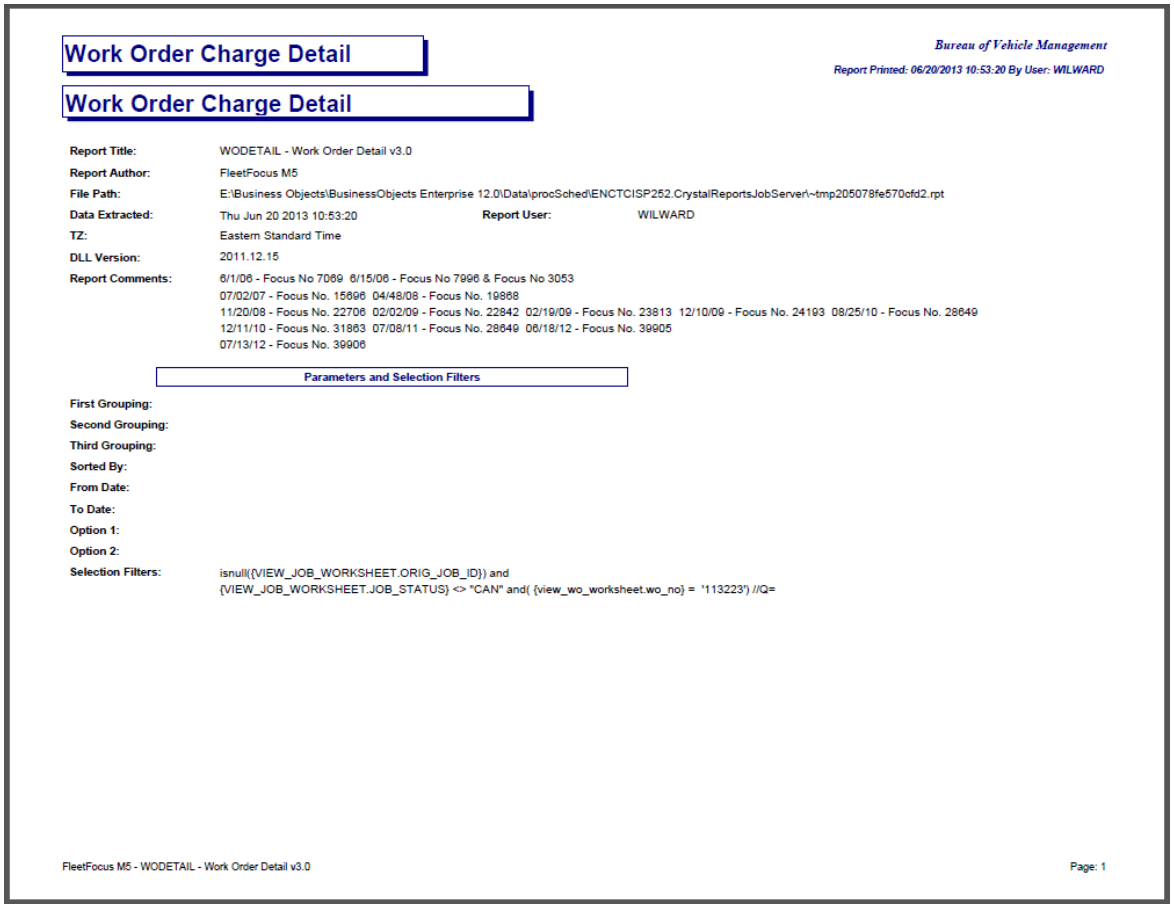
M5 Report Basics - Reports

- Work Order Detail



Work Order Charge Detail

Bureau of Vehicle Management

Report Printed: 06/20/2013 10:53:20 By User: WILWARD

Work Order Charge Detail

Report Title:	WODETAIL - Work Order Detail v3.0
Report Author:	FleetFocus M5
File Path:	E:\Business Objects\BusinessObjects Enterprise 12.0\Data\procSched\ENCTCISP252.CrystalReportsJobServer\~tmp205078fe570cfd2.rpt
Data Extracted:	Thu Jun 20 2013 10:53:20 **Report User:** WILWARD
TZ:	Eastern Standard Time
DLL Version:	2011.12.15
Report Comments:	6/1/06 - Focus No 7069 6/15/06 - Focus No 7996 & Focus No 3053 07/02/07 - Focus No. 15696 04/48/08 - Focus No. 19868 11/20/08 - Focus No. 22706 02/02/09 - Focus No. 22842 02/19/09 - Focus No. 23813 12/10/09 - Focus No. 24193 08/25/10 - Focus No. 28649 12/11/10 - Focus No. 31863 07/08/11 - Focus No. 28649 06/18/12 - Focus No. 39905 07/13/12 - Focus No. 39906

Parameters and Selection Filters

First Grouping:	
Second Grouping:	
Third Grouping:	
Sorted By:	
From Date:	
To Date:	
Option 1:	
Option 2:	
Selection Filters:	isnull({VIEW_JOB_WORKSHEET.ORIG_JOB_ID}) and {VIEW_JOB_WORKSHEET.JOB_STATUS} <> "CAN" and({view_wo_worksheet.wo_no} = '113223') //Q=

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M5 Report Basics

- Common Filters/Operators
  - Unit Brief Inventory
    - Display all active units in your agency
      - Unit Status – equals - A
  - Unit Meter Journal
    - All meter entries for a unit within a certain time frame
      - Meter 1 Date – between – *mm/dd/yyyy* – *mm/dd/yyyy*
      - Unit Number – equal - *unit number*

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M5 Report Basics

- Common Filters/Operators
  - Unit Assignment
    - Display all active units and their current operators
      - Unit Status – equal – A
  - Unit Job Cost History
    - Display all maintenance for a unit for a certain time period
      - Unit Number – equal – *unit number*
      - WO Completed Date – between – *mm/dd/yyyy* – *mm/dd/yyyy*

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M5 Report Basics

- Common Filters/Operators
  - Work Order Detail
    - Display the detail information from a Work Order
      - WO Number – equal – *work order number*
  - Organization Codes
    - Unit Using Dept No – like – *aa-nn%*
      - *aa* = Agency
      - *nn* = first two of the org code

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M5 Report Basics

- Additional Information
  - DO NOT run a report without including parameters:
    - Unit Status = A
    - Date Range on Work Order reports

M5 Report Basics

QUESTIONS??

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