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## **FLEET MANAGEMENT FOR PROFIT**

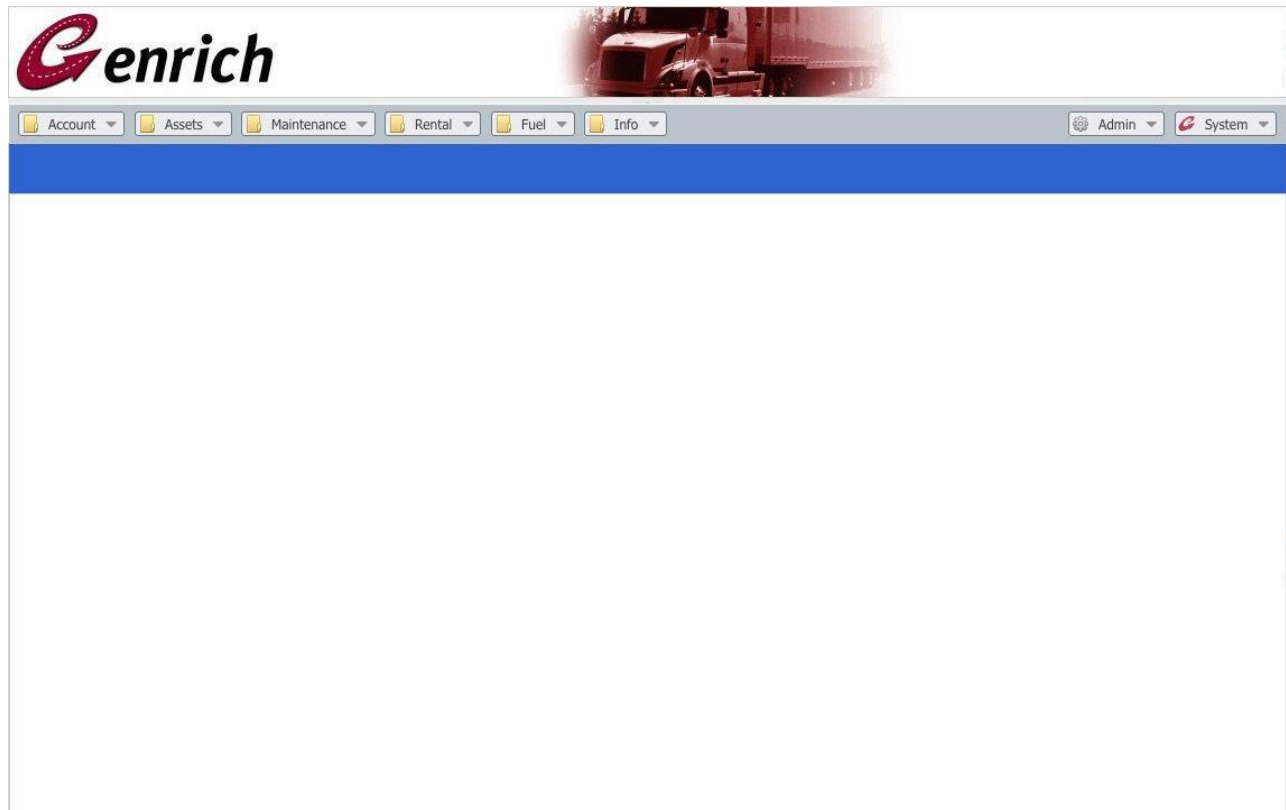
**CUSTOMER WEB ACCESS  
(CWA) USER REFERENCE**

# Introduction

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The Customer Web Access (CWA) module provides online access to information about your equipment units. You will find information in some or all of the following areas: Account, Asset, Maintenance, Rental, Fuel, and Information.

When you log in to CWA, a screen similar to this will appear:



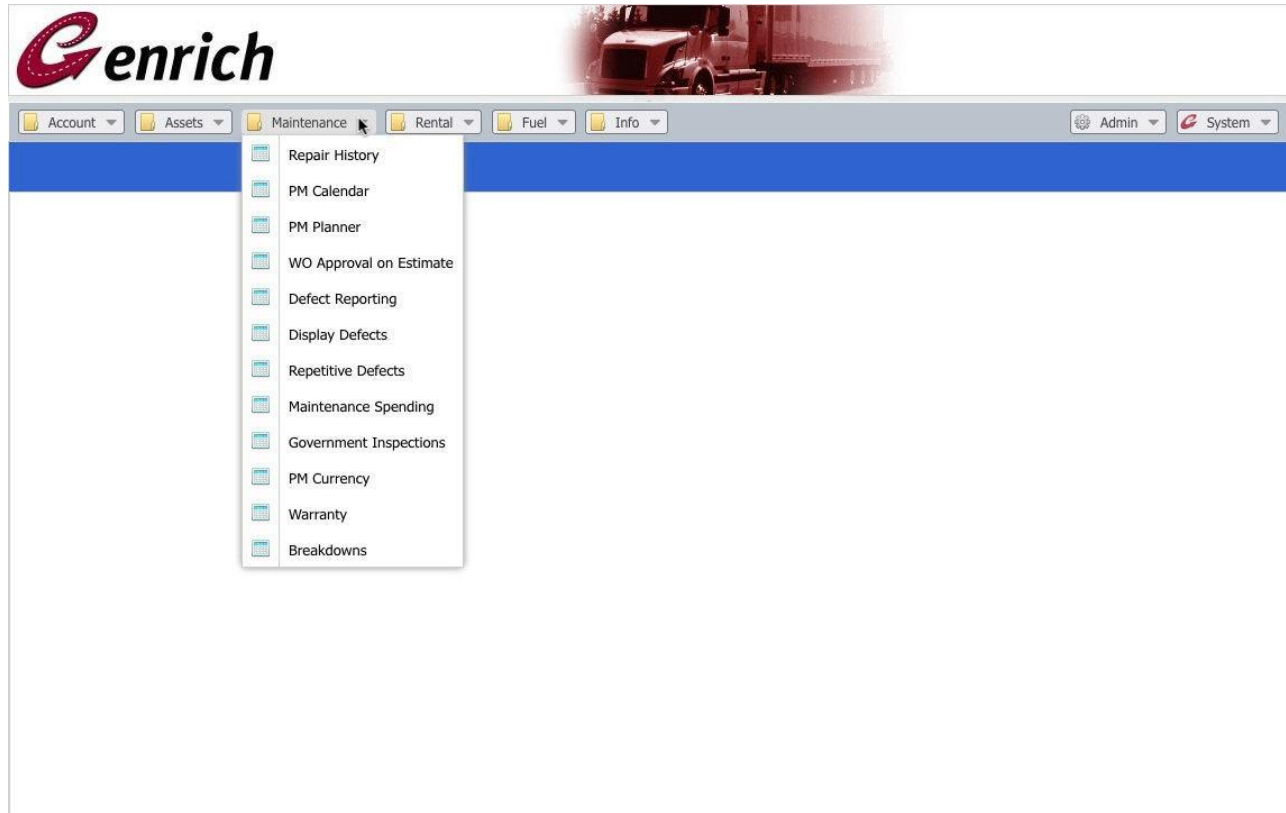
All standard Internet browser options work as usual.

When you click on a menu option,

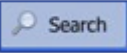


a drop-down list of selections will appear. Click on the selection you want to access the appropriate screen.


*Note: the names of some options may vary on your system.*



Most reports will load initial data based on defaults that have been pre-set; it may take a few seconds

for the results to appear. Some may not load data until you click on the  Search button that will appear in the top right section of the report screen. Some reports may not have search criteria for you to use.

## Information

Many screens have an information button  at the bottom right that you can click on to find out more about the particular panel you are on.

# Selection Fields/Filters

The top of the report screen may or may not show a number of selection fields (filters) you can use to tailor the report results.

The screenshot shows a web interface for 'Vehicle Information'. At the top, there is a blue header with the text 'Vehicle Information' and a close icon. Below this is a 'Search Criteria' section with a blue background and several icons (help, print, save, reset, search). The search criteria are organized into a grid of dropdown menus:

Cost Centre:	<input type="text"/>	Year:	<input type="text"/>	Unit:	<input type="text"/>
Make/Model:	<input type="text"/>	Equip. Type:	<input type="text"/>	Feature:	<input type="text"/>
Contract:	<input type="text"/>	Customer:	<input type="text"/>	Location:	<input type="text"/>

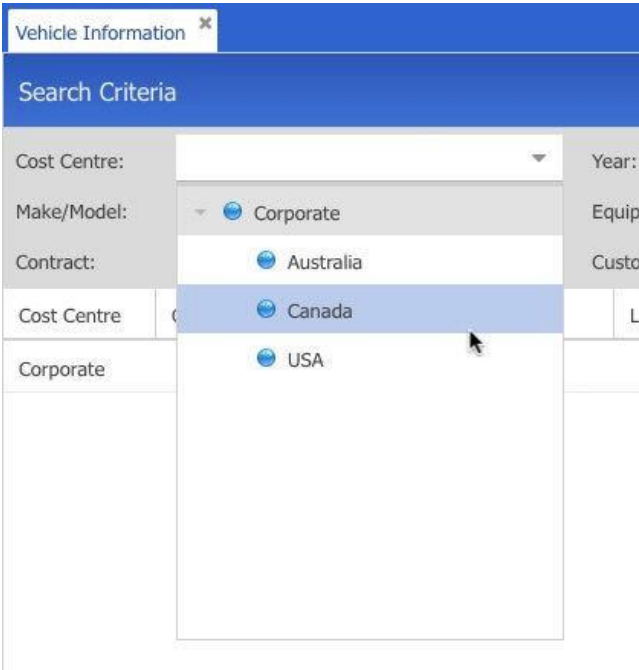
The number of possible selection fields will vary by report. Use the scroll bar to the right of the fields to view more, if available. You can use as many or as few filters as required to obtain the report you need.

Beside the field names, a column of selectable fields appears where you can identify what you want to see in the report. Many fields will have multiple levels of options for you to choose from. The options available will depend on the particular field.

The Cost Center field shows Corporate as the initial choice.

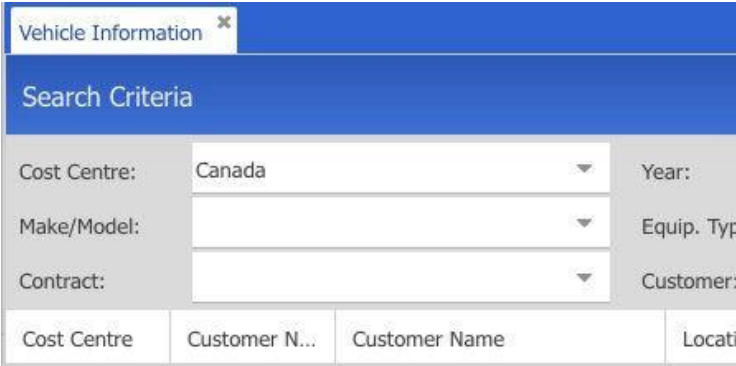
This screenshot shows the 'Cost Centre' dropdown menu expanded. At the top of the page, there are four tabs: 'Account', 'Assets', 'Maintenance', and 'Rental'. The 'Vehicle Information' header is visible. The 'Search Criteria' section is partially visible. The 'Cost Centre' dropdown is open, showing a list of options. The first option is 'Corporate', which is highlighted. The dropdown menu is positioned over the 'Cost Centre' field, which is currently empty.

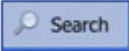
Clicking on the arrow shows more specific options:



There may be multiple levels to choose from.

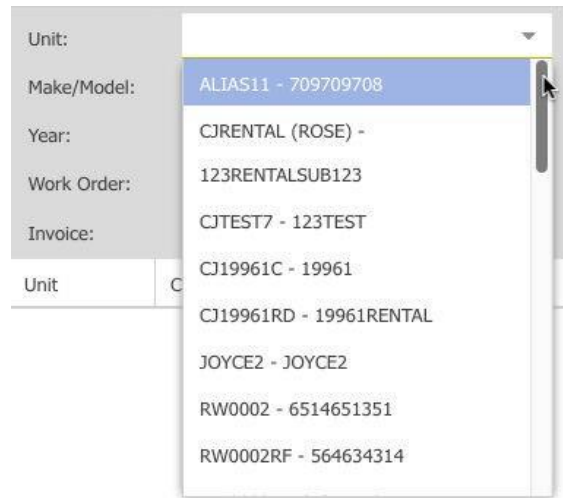
To make a selection, click on the item you want.



In order to have your new filter selections applied to the report, you must click on the  Search button at the far right of the filter section. The system will then (re)load the report using the new filter values.

## ***Selection Lists***

Some filters will provide a list of valid values, and some of these lists may be long. Use the scroll bar to locate the item you want.



The image shows a web form with several input fields. The 'Unit' field is selected, and a dropdown menu is open, displaying a list of values. The first value, 'ALIAS11 - 709709708', is highlighted in blue. A vertical scrollbar is visible on the right side of the dropdown list. The other fields in the form are: 'Make/Model', 'Year', 'Work Order', 'Invoice', and another 'Unit' field with the letter 'C' entered.

Unit:	
Make/Model:	ALIAS11 - 709709708
Year:	CJRENTAL (ROSE) -
Work Order:	123RENTALSUB123
Invoice:	CJTEST7 - 123TEST
Unit	C

- ALIAS11 - 709709708
- CJRENTAL (ROSE) -
- 123RENTALSUB123
- CJTEST7 - 123TEST
- CJ19961C - 19961
- CJ19961RD - 19961RENTAL
- JOYCE2 - JOYCE2
- RW0002 - 6514651351
- RW0002RF - 564634314

Click on the value you want to select it.

## ***Text Entry***

Some fields will not allow for a selection; instead, they will require you to enter text and/or numbers:



The image shows a single input field with the label 'Invoice:' and the value '886838' entered.

Invoice:	886838
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## ***Dates***


Date filters may have 2 input fields to allow you to enter a range of dates.











The image shows a date range input field with the label 'Year' and two input boxes containing the values '2008' and '2010'.

Year	2008	2010
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Date filters that require a full date will allow you to select from calendars:

Open Date: 2017-09-01 / 2017-09-08  Unit:

Close Date:        

Contract: << September 2017 >> << September 2017 >>

Billable: 

S	M	T	W	T	F	S	S	M	T	W	T	F	S
27	28	29	30	31	1	2	27	28	29	30	31	1	2
3	4	5	6	7	8	9	3	4	5	6	7	8	9
10	11	12	13	14	15	16	10	11	12	13	14	15	16
17	18	19	20	21	22	23	17	18	19	20	21	22	23
24	25	26	27	28	29	30	24	25	26	27	28	29	30
1	2	3	4	5	6	7	1	2	3	4	5	6	7

Assignments:  Open

Today Today

When 2 calendars appear, you can choose a range of dates. If you want a single day, click on that date on both calendars.

You can use the left and right arrows beside the month to change months. Use the down arrow beside the year to change the year. Click on the actual date you wish to select. Click on the Today button if you want to select the current date. Click on the Reset button to return both calendars to the default (usually the current date).

To finalize your selection, click anywhere outside the date boxes; the dates you selected will be filled in.

Open Date: 2017-01-01 / 2017-09-08 

## The date picker

The date picker allows for selection of absolute dates, relative dates, and/or periods.

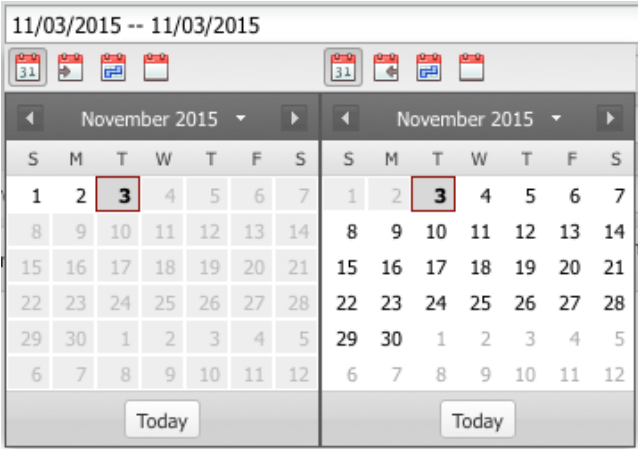
The relative and period selection options may take a little experimentation and practice to understand, but they provide a great deal of flexibility in your reporting. Reading the descriptions of your selections on the date pickers along with the dates that have actually been selected will help to speed up the learning process.

When you are picking a date range, the available combinations are:

- Absolute and Absolute
- Absolute and Relative
- Absolute and Period
- Absolute and Unbounded
- Relative and Period
- Relative and Unbounded
- Unbounded and Unbounded

Period and Period is not a valid option since a period needs to be relative to something.

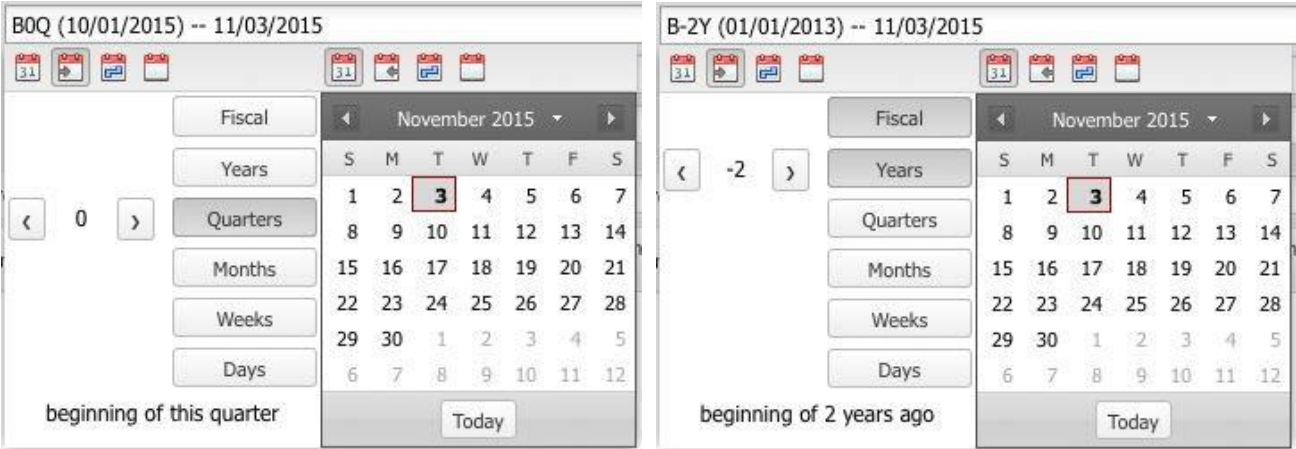
The Date Picker will look like this when you first open it:



This is the Absolute date range picker. It allows you to pick specific dates. The calendar on the left picks the start of the range and the calendar on the right picks the end of the range. You can click on the left, right, and down arrows beside the month and year in each calendar to view and select from different months and years.

To select a relative date, click on  for a relative beginning date or  for a relative end date, or both for relative beginning and end dates.

Relative beginning date with absolute end date:





Relative ending date with absolute beginning date:

11/03/2015 -- EOY (12/31/2015)

11/03/2015 -- E2M (01/31/2016)


or Relative beginning and relative ending dates:

B0Q (10/01/2015) -- EOY (12/31/2015)

B2Q (04/01/2016) -- E1Y (12/31/2016)

When choosing a range of relative dates, the relative date on the left is relative-to-beginning, the relative date on the right is relative-to-end.

With a range of dates, either the beginning date or the ending date can be a period, with the other date being either absolute or relative. A period may have any combination of Years, Months, Weeks, and Days. The only restriction is that the entire period must end up being positive.

To select a period, click on  for either the beginning or ending of the range.

Period as the beginning date choice:

POD (11/04/2015) -- 11/03/2015

The period defaults to 0 years, 0 months, 0 weeks, 0 days, which is an invalid selection (shown by the date range box being pink).

Changing one or more of the zeros should adjust the selection to a valid one:

The screenshot shows a date range selection interface. The title is "P1Y3W (10/14/2014) -- 11/03/2015". Below the title are four rows of controls for selecting a period: "Years" (1), "Months" (0), "Weeks" (3), and "Days" (0). To the right is a calendar for November 2015, with the date 3 (Wednesday) highlighted in a red box. The date range box is no longer pink, indicating a valid selection.

Now the beginning of the range is a period of 1 year and 3 weeks prior to the date selected as the end of the range, a valid selection.

Period as the ending date choice:

The screenshot shows a date range selection interface. The title is "B-1Q (07/01/2015) -- P0D (06/30/2015)". Below the title are several rows of controls for selecting a period: "Fiscal" (0), "Years" (0), "Quarters" (-1), "Months" (0), "Weeks" (0), and "Days" (0). The date range box is pink, indicating an invalid selection. The text "beginning of last quarter" is visible at the bottom.


Again, the period defaults to zero, which is an invalid selection.

The screenshot shows a date range selection interface. The title is "B-1Q (07/01/2015) -- P5M (11/30/2015)". Below the title are several rows of controls for selecting a period: "Fiscal" (0), "Years" (5), "Quarters" (-1), "Months" (0), "Weeks" (0), and "Days" (0). The date range box is no longer pink, indicating a valid selection. The text "beginning of last quarter" is visible at the bottom.

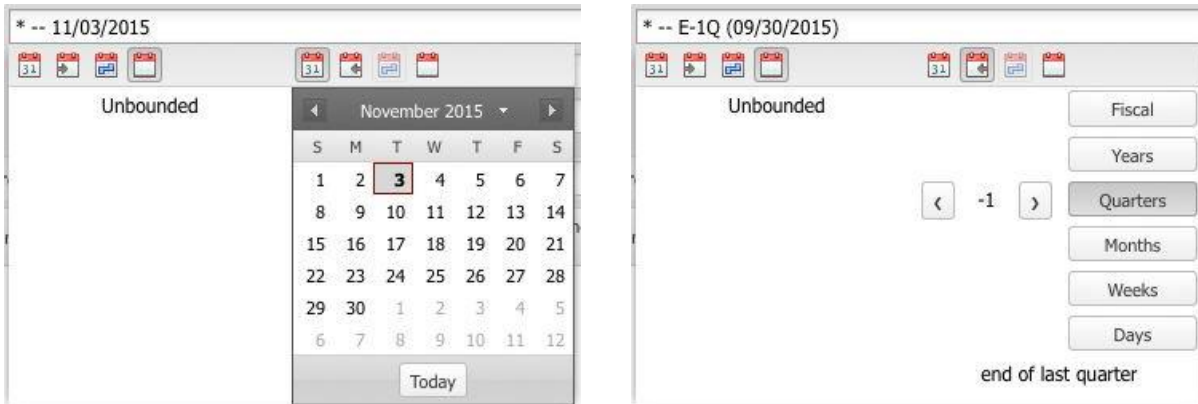
Now, we're going to report starting at the beginning of last quarter for a period of 5 months, a valid selection.

On the top line of the date picker, B0M means Beginning of current (0) Month. B-1W would be Beginning of last (-1) Week, E2Q would be End of 2 Quarters from now. P0D means Period of 0 Days.

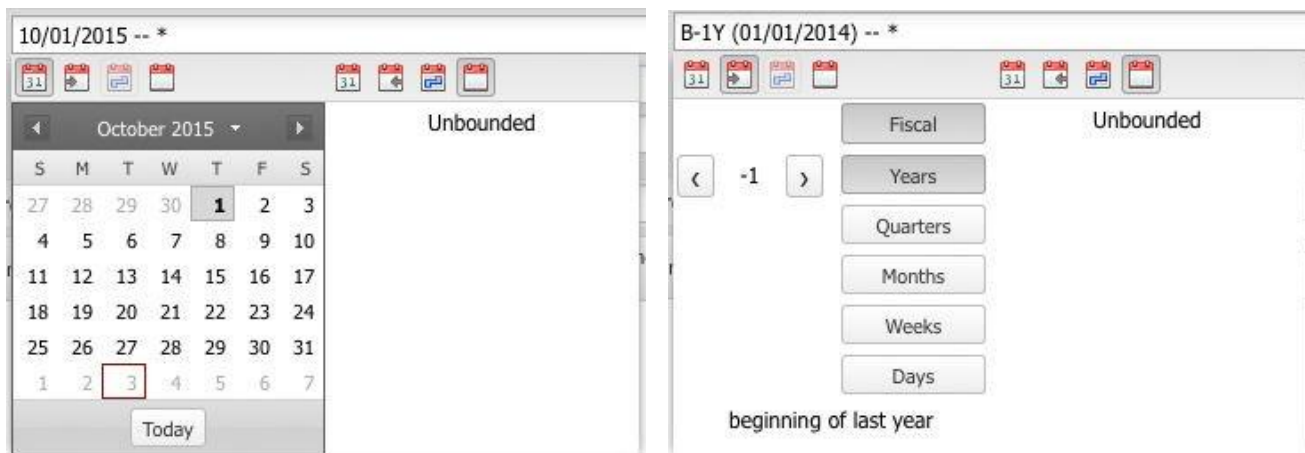
The Unbounded option allows you to effectively select “any date within 24 months” as the beginning and/or ending date. The Unbounded date can be combined with an absolute date or a relative date, but not a period.

To select an unbounded date, click on  for an unbounded beginning or end date, or for both unbounded beginning and end dates.

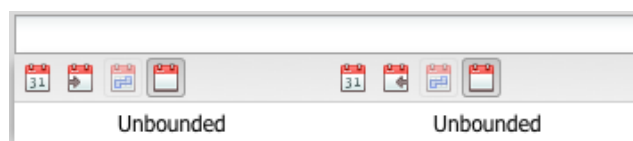
Unbounded beginning date:




Unbounded ending date:



Unbounded beginning and ending dates (Note that this is the same as entering no dates, and therefore would not normally be used.):



And don't forget, in order to have your date filter selections applied to the report, you must click on the  button at the top right of the filter section.

The system will then reload the report using the new dates.

# Change Report Appearance

You can change the order of the columns by clicking and dragging the column heading to the position you want it in. As you drag, arrows will appear to show you where the column will be if you release the mouse button.

Cust. Unit	Unit
	<a href="#">JOYCE2</a>
	<a href="#">S3869</a>
	<a href="#">TR2135</a>
	<a href="#">000425</a>
	<a href="#">000490</a>

You can change the width of a column. Rest your cursor on the line between the column you wish to change the size of and the column immediately to the right of that column. The cursor will change to two bars with arrows on either side. Click and hold the mouse button while you drag in the direction of change; i.e. if you wish to expand the column, drag to the right; if you wish to decrease the width of the column, drag to the left. Release the mouse button when the column reaches the desired size.

Cust...	Unit
	<a href="#">JOYCE2</a>
	<a href="#">S3869</a>
	<a href="#">TR2135</a>
	<a href="#">000425</a>
	<a href="#">000490</a>

*Note: that some columns may have a minimum width defined; you will not be able to drag them smaller.*

You can choose to remove columns from the report. Place the cursor on a column heading; an arrow will appear on the right side of that heading. Click on the arrow to see the options; click on the Columns option.

Cost Centre	Unit	Cust. Unit	Customer N...
Corporate	↑ Sort Ascending		
Corporate	↓ Sort Descending		
Corporate	Columns		
Corporate	<a href="#">000425</a>		
Corporate	<a href="#">000490</a>		
Corporate	<a href="#">3775</a>		
Corporate	<a href="#">3898</a>		
Corporate	<a href="#">4223</a>		
Corporate	<a href="#">4327</a>		



Cost Centre  
 Unit  
 Cust. Unit  
 Customer Number  
 Customer Name  
 Location  
 Serial No.  
 Year  
 Make  
 Model

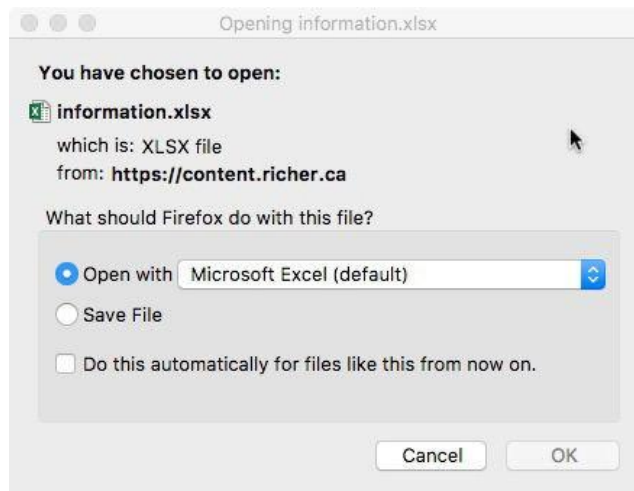
Each column in the report will appear on the list. Click on a column's checkmark to remove it, and that column will no longer appear on your report.

You can re-add a column by clicking on the column's blank box on the list to add the checkmark back in.

# Downloading Reports

Once you have a report showing the information you need, you may be able to download it to Excel or to a CSV format. (Note that this option may not be available for all reports.)

To download a report, click on the Download Excel button  or the Download CSV button  at the top right of the screen. The file will be prepared, and you will see the following screen:



You can choose to open the file immediately in Excel (if you have Excel installed), or to save the file.

**NOTE:** If you are having trouble viewing Excel downloads and you are using IE 7 and Excel 2000 on Windows XP, you should follow the instructions here <http://support.microsoft.com/kb/162059> to resolve the issue. The issue may impact other versions of the software as well, but it is a confirmed issue on XP/ IE7/Office2000.

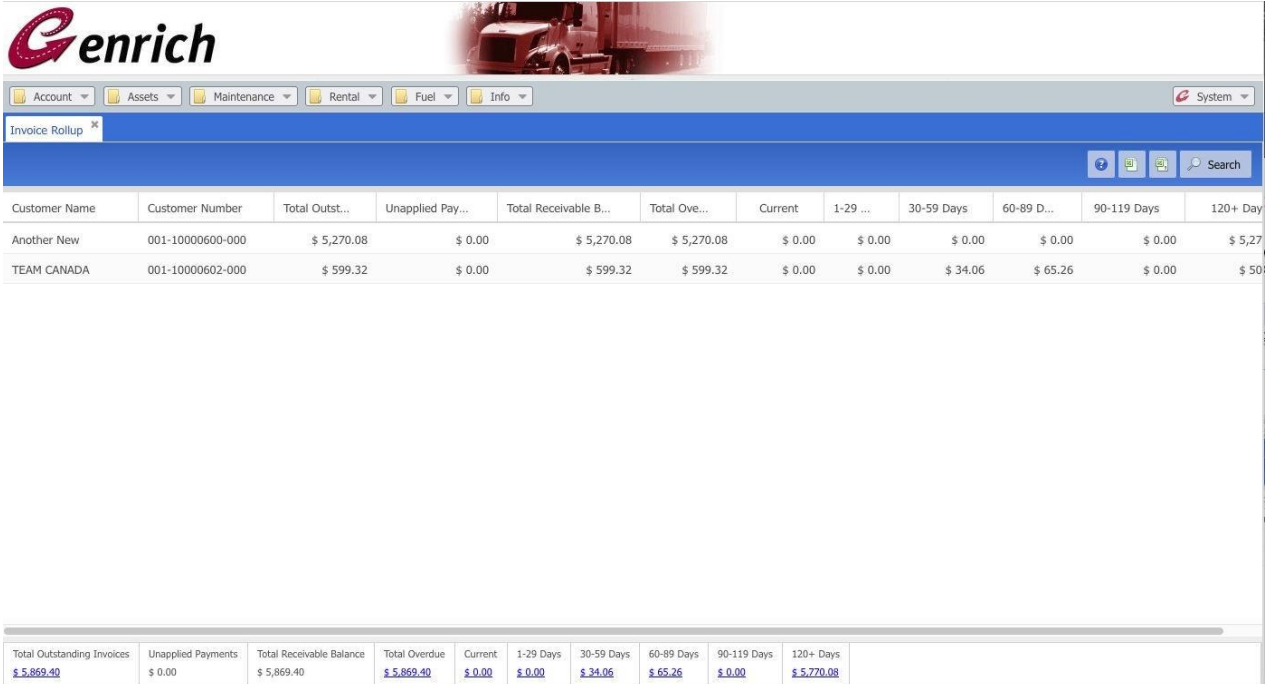
# Invoices

## Invoice Rollup

**Purpose:** Invoice Rollup allows you to view a summary of outstanding, overdue, and unapplied payments. You can also access detailed information from this screen.

### How To Get Here:

Start	Action	Result
From the CWA menu	Select <u>Account   Invoice Rollup</u>	The Invoice Rollup tab appears





The screenshot shows the Genrich Invoice Rollup interface. At the top, there is a navigation bar with tabs for Account, Assets, Maintenance, Rental, Fuel, and Info. Below this is a table with columns for Customer Name, Customer Number, Total Outstanding, Unapplied Payments, Total Receivable Balance, Total Overdue, Current, and various bucket categories (1-29 Days, 30-59 Days, 60-89 Days, 90-119 Days, 120+ Days). The table contains two rows of data for 'Another New' and 'TEAM CANADA'. At the bottom of the screen, there is a summary table with columns for Total Outstanding Invoices, Unapplied Payments, Total Receivable Balance, Total Overdue, Current, and the same bucket categories as the main table.

Customer Name	Customer Number	Total Outst...	Unapplied Pay...	Total Receivable B...	Total Ove...	Current	1-29 ...	30-59 Days	60-89 D...	90-119 Days	120+ Day
Another New	001-10000600-000	\$ 5,270.08	\$ 0.00	\$ 5,270.08	\$ 5,270.08	\$ 0.00	\$ 0.00	\$ 0.00	\$ 0.00	\$ 0.00	\$ 5,27
TEAM CANADA	001-10000602-000	\$ 599.32	\$ 0.00	\$ 599.32	\$ 599.32	\$ 0.00	\$ 0.00	\$ 34.06	\$ 65.26	\$ 0.00	\$ 50

Total Outstanding Invoices	Unapplied Payments	Total Receivable Balance	Total Overdue	Current	1-29 Days	30-59 Days	60-89 Days	90-119 Days	120+ Days
\$ 5,869.40	\$ 0.00	\$ 5,869.40	\$ 5,869.40	\$ 0.00	\$ 0.00	\$ 34.06	\$ 65.26	\$ 0.00	\$ 5,270.08

### What You Can Do From Here:

Function	Action	Result	Refer To
To <b>download</b> the summary to an Excel file	Click the  Download Excel button at the top right of the screen	The summary will be downloaded and, if you have MS Excel installed on your desktop, it will open the file in Excel for viewing	
	NOTE: If you are having trouble viewing Excel downloads and you are using IE 7 and Excel 2000 on Windows XP, you should follow the instructions here <a href="http://support.microsoft.com/kb/162059">http://support.microsoft.com/kb/162059</a> to resolve the issue. The issue may impact other versions of the software as well, but it is a confirmed issue on XP/IE7/Office2000.		
To <b>download</b> the summary to a comma-separated values (CSV) file	Click the  Download CSV button at the top right of the screen	The results will be downloaded and, if you have MS Excel installed on your desktop, it will open the file in Excel for viewing	
To view <b>details</b> about total outstanding, total overdue, current, or any of the bucket amounts	Click on the appropriate amount hyperlink at the bottom of the screen	The appropriate tab appears	

# Invoice and Payments

**Purpose:** Invoice and Payments allows you to view your monthly lease and variable invoices and any payments made against them. The billing information is displayed in either a single invoice or broken amongst suffixes where required. If there is an invoice that has payment applied against it from two different cheques, it will show up on two lines.

## How To Get Here:




Start	Action	Result
From the CWA menu	Select <u>Account</u>   <u>Invoice and Payments</u>	The <i>Invoice and Payments</i> tab appears, with data based on the default search criteria

Invoice	Invoice Date	Due Date	Invoice Type	Invoice Amount	Open Amount	Status	Payment	Check Number
<a href="#">60056118</a>	08/24/2017	09/07/2017	Manual / Miscellane...	\$ 100.00	\$ 100.00	Open	\$ 0.00	
<a href="#">60056122</a>	07/31/2017	08/14/2017	Manual / Miscellane...	\$ 200.00	\$ 200.00	Open	\$ 0.00	
<a href="#">60056125</a>	08/24/2017	09/07/2017	Manual / Miscellane...	\$ 100.00	\$ 100.00	Open	\$ 0.00	
<a href="#">60056128</a>	08/25/2017	09/08/2017	Manual / Miscellane...	\$ 2,200.00	\$ 2,200.00	Open	\$ 0.00	
<a href="#">60056129</a>	08/17/2017	08/31/2017	Manual / Miscellane...	\$ 227.00	\$ 227.00	Open	\$ 0.00	
<a href="#">60056769</a>	10/31/2017	11/14/2017	Consolidated	\$ 228.62	\$ 228.62	Open	\$ 0.00	
<a href="#">60056864</a>	12/01/2017	12/31/2017	Permit	\$ 110.00	\$ 35.00	Open	\$ 75.00	800003
<a href="#">60057292</a>	02/13/2018	02/23/2018	Manual / Miscellane...	\$ 56.75	\$ 56.75	Open	\$ 0.00	
<a href="#">60057293</a>	02/14/2018	03/30/2018	Manual / Miscellane...	\$ 28.38	\$ 28.38	Open	\$ 0.00	
<a href="#">60057298</a>	02/13/2018	02/13/2018	Manual / Miscellane...	\$ 8.51	\$ 8.51	Open	\$ 0.00	
<a href="#">60057299</a>	02/13/2018	03/15/2018	Manual / Miscellane...	\$ 5.68	\$ 5.68	Open	\$ 0.00	

## Search Criteria on This Screen Are:

Field	Description
cost center	view invoices for a specific cost center
invoice date	view invoices for a range of invoice dates
due date	view invoices for a range of payment due dates
unit	view invoices for a specific unit
location	view invoices for a specific location
contract	view invoices for a specific contract
status	view invoices for a specific status; choices are Open or Fully Paid
invoice type	view invoices of a specific type; e.g. lease, rental, fuel, etc.
invoice	allows entry of a specific invoice number to view
check number	view the invoices applied to a specific check

**What You Can Do From Here:**

Function	Action	Result
To perform a <b>search and view the results</b> at the bottom of the page	Enter or change search criteria, then click the  Search button	The search will be performed and the search criteria you enter will be remembered for the duration of your session
To <b>reset the search criteria elements</b> to their default values, or to the previously saved search values	Click on the Reset button 	
To view an <b>invoice's details</b>	Click on the hyperlink in the <i>invoice</i> column	The <i>Invoice Details</i> tab appears
To <b>download</b> the report to an Excel file	Click the  Download Excel button on the top right of the screen	The report will be downloaded and, if you have MS Excel installed on your desktop, it will open the file in Excel for viewing
<p>NOTE: If you are having trouble viewing Excel downloads and you are using IE 7 and Excel 2000 on Windows XP, you should follow the instructions here <a href="http://support.microsoft.com/kb/162059">http://support.microsoft.com/kb/162059</a> to resolve the issue. The issue may impact other versions of the software as well, but it is a confirmed issue on XP/IE7/Office2000.</p>		



# Assets

## Vehicle Status

**Purpose:** The vehicle status option lists your vehicle fleet with some basic information about each vehicle. Key data elements shown include Status and Estimated Available Time, which indicates the status of the vehicle at this moment in time: active, in garage, breakdown, etc. If the vehicle is not in service, then the current work order(s) keeping the vehicle in the garage or breakdown are displayed and can be viewed. You can also view further vehicle information by clicking on the unit number.

### How To Get Here:

Start	Action	Result
At the CWA menu	Select <a href="#">Assets</a>   <a href="#">Vehicle Status</a>	The <i>Vehicle Status</i> tab appears, with data based on the default search criteria

The screenshot shows the Genrich Vehicle Status interface. At the top left is the Genrich logo. Below it are navigation tabs: Account, Assets, Maintenance, Rental, and Info. On the right, there are Admin and System dropdown menus. The main area is titled 'Vehicle Status' and contains a 'Search Criteria' section with several dropdown menus for Cost Centre, Contract, Customer, Unit, Status, Location, Make/Model, and Equip. Type. Below the search criteria is a table with the following columns: Cost Centre, Customer N..., Customer Name, Location, Unit, Cust. Unit, Serial No., Year, Make, Model, Equip. Type, Status, Work Order, and Est. Avail... The table contains 11 rows of vehicle data.




Cost Centre	Customer N...	Customer Name	Location	Unit	Cust. Unit	Serial No.	Year	Make	Model	Equip. Type	Status	Work Order	Est. Avail...
Corporate	10000001-0...	Customer 10000001-000		<a href="#">JOYCE2</a>		JOYCE2	2016	KENWORTH MOTOR TRU...	KENWORTH...	SINGLE AXLE CONV...	Operational		
Corporate	10000001-0...	Customer 10000001-000		<a href="#">S3869</a>		JALE5W161D7901273	2013	ISUZU MOTORS LTD.	UNKNOWN	STRAIGHT TRUCK, ...	Operational		
Corporate	10000001-0...	Customer 10000001-000		<a href="#">TR2135</a>		1GRAA962065701879	2006	GREAT DANE TRAILERS	G-D TRAILER	REEFER TRAILER	Operational		
Corporate	10000001-0...	Customer 10000001-000		<a href="#">000425</a>		000425	2016	FREIGHTLINER CORP.	C120	SINGLE AXLE CONV...	Operational		
Corporate	10000001-0...	Customer 10000001-000		<a href="#">000490</a>		098080808	2017	FREIGHTLINER CORP.	CL120 - CO...	CDL VAN	Operational		
Corporate	10000001-0...	Customer 10000001-000		<a href="#">3725</a>		5PVNJ8JTXD4554307	2013	HINO MOTORS LTD	268A	STRAIGHT TRUCK, ...	Operational		
Corporate	10000001-0...	Customer 10000001-000		<a href="#">3898</a>		1FUJGEDV6ELFR1956	2014	FREIGHTLINER CORP.	Cascadia	TANDEM AXLE DAY ...	Operational		
Corporate	10000001-0...	Customer 10000001-000		<a href="#">4223</a>		1FVACWDT8GHGX9...	2016	FREIGHTLINER CORP.	M2106	STRAIGHT TRUCK, ...	Operational		
Corporate	10000001-0...	Customer 10000001-000		<a href="#">4327</a>		1FVHCSDV4GHHL87...	2016	FREIGHTLINER CORP.	M2112	STRAIGHT TRUCK, ...	Operational		
Corporate	10000001-0...	Customer 10000001-000		<a href="#">4363</a>		3ALACWDT0GDHT7...	2016	FREIGHTLINER CORP.	M2106	STRAIGHT TRUCK, ...	Operational		

The search criteria on this screen are:

Field	Definition
cost center	view vehicles for a specific cost center
unit	view a specific unit
make/model	view vehicle with a specific and model
contract	view vehicles for a specific contract
status	view vehicles with a specific status e.g. in garage, operational, etc.
equipment type	currently not in use

customer	view vehicles for a specific customer
location	view vehicles for a specific location

### What you can do from here:

Function	Action	Result
To perform a <b>search</b>	Enter or change search criteria, then click the  Search button	The search will be performed and the search criteria you enter will be remembered for the duration of your session
To <b>reset</b> the search criteria elements to their default values, or to the previously saved search values	Click on the  Reset button	
To view a <b>unit's details</b>	Click on the hyperlink in the <i>unit number</i> column	The <i>Unit Details</i> tab appears
To view the <b>work order</b> a unit is on	Click on the hyperlink in the <i>work order</i> column	The <i>Work Order</i> tab appears
To <b>download</b> the report to an Excel file	Click the  Download Excel button on the top right of the screen	The report will be downloaded and, if you have MS Excel installed on your desktop, it will open the file in Excel for viewing
<p>NOTE: If you are having trouble viewing Excel downloads and you are using IE 7 and Excel 2000 on Windows XP, you should follow the instructions here <a href="http://support.microsoft.com/kb/162059">http://support.microsoft.com/kb/162059</a> to resolve the issue. The issue may impact other versions of the software as well, but it is a confirmed issue on XP/IE7/Office2000.</p>		

# Vehicle Information

**Purpose:** The Vehicle Information option allows you to view all stored information about your units. This includes things like feature codes, PM regime, licensing, and meter readings.

## How To Get Here:

Start	Action	Result
At the CWA menu	Select <a href="#">Assets   Vehicle Information</a>	The <i>Vehicle Information</i> tab appears, with data based on the default search criteria


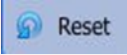

The screenshot shows the Genrich Vehicle Information interface. At the top, there is a navigation bar with tabs for Account, Assets, Maintenance, Rental, and Info. Below this is a search criteria section with dropdown menus for Cost Centre, Make/Model, Contract, Year, Equip. Type, Customer, Unit, Feature, and Location. A table below the search criteria displays a list of vehicles with columns for Cost Centre, Customer N., Customer Name, Location, Unit, Cust. Unit, Serial No., Year, Make, Model, Equip. Type, Equip. Pool, and Contract.

Cost Centre	Customer N...	Customer Name	Location	Unit	Cust. Unit	Serial No.	Year	Make	Model	Equip. Type	Equip. Pool	Contract
Corporate	10000001-0...	Customer 10000001-000		JOYCE2		JOYCE2	2016	KENWORTH MOTOR TRU...	KENWORTH...	SINGLE AXLE CONV...	RENTAL PO...	RC-80012818
Corporate	10000001-0...	Customer 10000001-000		S3869		JALESW161D7901273	2013	ISUZU MOTORS LTD.	UNKNOWN	STRAIGHT TRUCK, ...	MAINTENA...	
Corporate	10000001-0...	Customer 10000001-000		TR2135		1GRAA962065701879	2006	GREAT DANE TRAILERS	G-D TRAILER	REEFER TRAILER	HUTCHINS ...	
Corporate	10000001-0...	Customer 10000001-000		000425		000425	2016	FREIGHTLINER CORP.	C120	SINGLE AXLE CONV...	RENTAL PO...	
Corporate	10000001-0...	Customer 10000001-000		000490		098080808	2017	FREIGHTLINER CORP.	CL120 - CO...	CDL VAN	RENTAL PO...	RC-80013053
Corporate	10000001-0...	Customer 10000001-000		3775		5PVNJ8JTXD4S54307	2013	HINO MOTORS LTD	268A	STRAIGHT TRUCK, ...	RENTAL PO...	RC-80012847
Corporate	10000001-0...	Customer 10000001-000		3898		1FUJGEDV6ELFR1956	2014	FREIGHTLINER CORP.	Cascadia	TANDEM AXLE DAY ...	LEASE POO...	
Corporate	10000001-0...	Customer 10000001-000		4223		1FVACWDT8GHGX9...	2016	FREIGHTLINER CORP.	M2106	STRAIGHT TRUCK, ...	LEASE POO...	LC-175
Corporate	10000001-0...	Customer 10000001-000		4327		1FVHC5DV4GHHL87...	2016	FREIGHTLINER CORP.	M2112	STRAIGHT TRUCK, ...	LEASE POO...	
Corporate	10000001-0...	Customer 10000001-000		4363		3ALACWDTGDHT7...	2016	FREIGHTLINER CORP.	M2106	STRAIGHT TRUCK, ...	RENTAL PO...	

The search criteria on this screen are:

Field	Definition
cost center	view vehicles for a specific cost center
year	view vehicles for a specific range of years
unit	view a specific unit
make/model	view vehicle with a specific and model
equipment type	currently not in use
feature	currently not in use
contract	view vehicles for a specific contract
customer	view vehicles for a specific customer
location	view vehicles for a specific location

## What you can do from here:

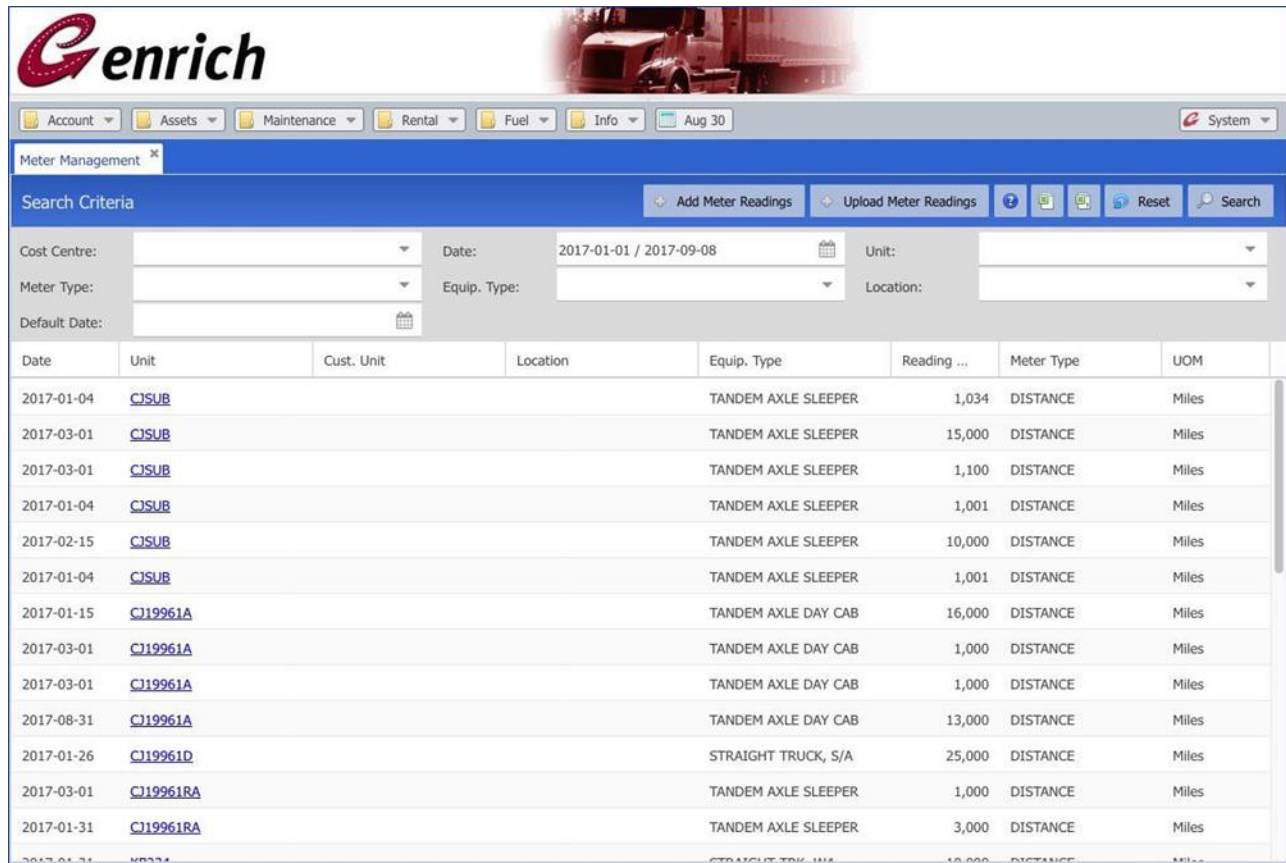
Function	Action	Result
To perform a <b>search</b>	Enter or change search criteria, then click the  Search button	The search will be performed and the search criteria you enter will be remembered for the duration of your session
To <b>reset</b> the search criteria elements to their default values, or to the previously saved search values	Click on the  Reset button	
To view a <b>unit's details</b>	Click on the hyperlink in the <i>unit number</i> column	The <i>Unit Details</i> tab appears
To view a <b>contract</b>	Click on the hyperlink in the <i>contract</i> column	The <i>Unit Details</i> tab appears
To <b>download</b> the report to an Excel file	Click the  Download Excel button on the top right of the screen	The report will be downloaded and, if you have MS Excel installed on your desktop, it will open the file in Excel for viewing
<p>NOTE: If you are having trouble viewing Excel downloads and you are using IE 7 and Excel 2000 on Windows XP, you should follow the instructions here <a href="http://support.microsoft.com/kb/162059">http://support.microsoft.com/kb/162059</a> to resolve the issue. The issue may impact other versions of the software as well, but it is a confirmed issue on XP/IE7/Office2000.</p>		

# Meter Management

**Purpose:** This option lists the current reading values for meters on your vehicle fleet. New readings may be added.

## How To Get Here:

Start	Action	Result
At the CWA menu	Select <a href="#">Assets</a>   <a href="#">Meter Management</a>	The <i>Meter Management</i> tab appears, with data based on the default search criteria



The screenshot shows the Genrich Meter Management interface. At the top, there is a navigation bar with tabs for Account, Assets, Maintenance, Rental, Fuel, Info, and a date selector for Aug 30. Below this is a search criteria section with fields for Cost Centre, Meter Type, Default Date, Date (2017-01-01 / 2017-09-08), Equip. Type, Unit, and Location. There are also buttons for Add Meter Readings, Upload Meter Readings, Reset, and Search. The main area displays a table of meter readings.




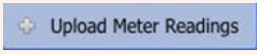

Date	Unit	Cust. Unit	Location	Equip. Type	Reading ...	Meter Type	UOM
2017-01-04	<a href="#">CJSUB</a>			TANDEM AXLE SLEEPER	1,034	DISTANCE	Miles
2017-03-01	<a href="#">CJSUB</a>			TANDEM AXLE SLEEPER	15,000	DISTANCE	Miles
2017-03-01	<a href="#">CJSUB</a>			TANDEM AXLE SLEEPER	1,100	DISTANCE	Miles
2017-01-04	<a href="#">CJSUB</a>			TANDEM AXLE SLEEPER	1,001	DISTANCE	Miles
2017-02-15	<a href="#">CJSUB</a>			TANDEM AXLE SLEEPER	10,000	DISTANCE	Miles
2017-01-04	<a href="#">CJSUB</a>			TANDEM AXLE SLEEPER	1,001	DISTANCE	Miles
2017-01-15	<a href="#">CJ19961A</a>			TANDEM AXLE DAY CAB	16,000	DISTANCE	Miles
2017-03-01	<a href="#">CJ19961A</a>			TANDEM AXLE DAY CAB	1,000	DISTANCE	Miles
2017-03-01	<a href="#">CJ19961A</a>			TANDEM AXLE DAY CAB	1,000	DISTANCE	Miles
2017-08-31	<a href="#">CJ19961A</a>			TANDEM AXLE DAY CAB	13,000	DISTANCE	Miles
2017-01-26	<a href="#">CJ19961D</a>			STRAIGHT TRUCK, S/A	25,000	DISTANCE	Miles
2017-03-01	<a href="#">CJ19961RA</a>			TANDEM AXLE SLEEPER	1,000	DISTANCE	Miles
2017-01-31	<a href="#">CJ19961RA</a>			TANDEM AXLE SLEEPER	3,000	DISTANCE	Miles

This report is a list of all the readings for all of your company's units. It contains a row for each reading for the units matching the search criteria.

## The search criteria on this screen are:

Field	Definition
cost center	view readings for a specific cost center
date	view readings for a specific range of dates
unit	view readings for a specific unit
meter type	view readings for a specific meter type
equipment type	currently not in use
location	view readings for a specific location
default date	view readings for specific date

## What you can do from here:


Function	Action	Result
To perform a <b>search</b>	Enter or change search criteria, then click the  Search button	The search will be performed and the search criteria you enter will be remembered for the duration of your session
To <b>reset</b> the search criteria elements to their default values, or to the previously saved search values	Click on the Reset button 	
To <b>add</b> meter readings	Click on 	The <i>Add Meter Readings</i> tab appears
To <b>upload</b> meter readings	Click on 	The <i>Unit Details</i> tab appears
To view a <b>unit's details</b>	Click on the hyperlink in the <i>unit number</i> column	The <i>Unit Details</i> tab appears
To <b>download</b> the report to an Excel file	Click the  Download Excel button on the top right of the screen	The report will be downloaded and, if you have MS Excel installed on your desktop, it will open the file in Excel for viewing

NOTE: If you are having trouble viewing Excel downloads and you are using IE 7 and Excel 2000 on Windows XP, you should follow the instructions here <http://support.microsoft.com/kb/162059> to resolve the issue. The issue may impact other versions of the software as well, but it is a confirmed issue on XP/IE7/Office2000.

# Add Meter Reading

**Purpose:** This option allows you to enter meter readings.

## How To Get Here:

Start	Action	Result
At the CWA menu	Select <u><a href="#">Assets   Meter Management</a></u>	The <i>Meter Management</i> tab appears
	Click on 	The <i>Add Meter Readings</i> tab appears




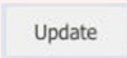

Account Assets Maintenance Rental Fuel Info Aug 30 System

Meter Management Add Meter Readings

Submit Search

Unit	Cust. Unit	Meter Type	Reading Value	Reading Date	UOM	Current Reading ...	Current Reading Date	Message
CJSUB		DIST		2017-09-08	MLS	15,000.00	2017-03-01	


What you can do from here:


Function	Action	Result
To add meter readings	Click on the <i>reading value</i> field for the unit	An input field will appear
		
	Fill in the new <i>reading value</i> and, if necessary, change the <i>reading date</i>	
	Press <b>Enter</b> or click the  button	The new readings will be validated, and the results of the validation will appear in the <i>message</i> column. The possible values are: <ul style="list-style-type: none"> <li>• Blank - no reading has been entered so no validation was performed.</li> <li>• <b>OK</b> - the reading has been validated and accepted.</li> <li>• <b>Reading must increase</b> - the reading entered is less than the value of the previous reading.</li> <li>• <b>Increase is too large</b> - the reading entered is larger than the tolerance specified in the system.</li> </ul>
	When all readings have been entered, click 	The new readings will be submitted

# Upload Meter Readings

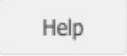
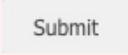
**Purpose:** This option allows you to upload a meter readings file to the system.

## How To Get Here:

Start	Action	Result
At the CWA menu	Select <i>Assets</i>   <i>Meter Management</i>	The <i>Meter Management</i> tab appears
	Click on 	The <i>Upload Meter Readings</i> panel appears



## What you can do from here:

Function	Action	Result
To <b>create</b> the file	Click on the  button to find and download the template file; it will be in the format detailed on the next page	
	Create the data file using the template and save it as a CSV after removing all headings	
To <b>upload</b> the file	Fill in or select the file name, then click the  button	The system will perform some validation, ensuring that a file name was entered and that it is a genuine file



It will also check to make sure the unit is on an active contract in order to upload to billing; otherwise it just uploads to EMMS

You will return to the *Meter Management* tab where a confirmation message that the upload was successful will display

The uploaded file must be in the following format:

Field #	Description	Format	Data Type	Max Length	M/O	Comment
1	Reading Date	YYMMDD or MMDDYY or DDMMYY	Numeric	6	mandatory	Format depends on the date format on the iSeries server
2	Reading Time	HHMM	Numeric	4	mandatory	
3	Unit Number		alpha	10	mandatory	<i>enrich</i> unit number
4	Metric Type		alpha	6	mandatory	
5	Reading	99999999	numeric	8.0	mandatory	The reading. Whether it is current or LTD is defined on the interface definition record
6	UOM		alpha	3	mandatory	
7	State From		alpha	2	optional	The from state. Must be valid if entered. Only used for the interface to Fuel Tax
8	State To		alpha	2	optional	The to state. Must be valid if entered. Only used for the interface to Fuel Tax

# Maintenance

## Repair History

**Purpose:** Repair history allows you to view all work order activity for a particular vehicle. Initially, it displays a summary of each work order line and has links to view work order details, invoice details and, where appropriate, an electronic document of the actual work order completed on the shop floor.

### How To Get Here:

Start	Action	Result
At the CWA menu	Select <a href="#">Maintenance</a>   <a href="#">Repair History</a>	The <i>Repair History</i> tab appears, with data based on the default search criteria

The screenshot shows the Mendon Repair History interface. At the top, there are navigation tabs for Account, Assets, Maintenance, Rental, Fuel, Info, and a date selector for Aug 30. Below this is a search criteria section with various filters like Cost Centre, Invoice Date, Task, Component, Reasons, Open Date, Close Date, Contract, Billable, Assignments, Unit, Make/Model, Year, Work Order, and Invoice. A table below the search criteria displays a list of repair records with columns for Cost Centre, Customer Name, Customer Name, Open Date, Close Date, Invoice, Unit, Cust. ..., Year, Make, Model, Equip. Type, and VMRS. At the bottom, there is a summary table with columns for Total Line Costs, Distinct Units, Distinct WOs, and Distinct Invoices.

Cost Centre	Customer N...	Customer Name	Open Date	Close D...	Invoic...	Unit	Cust. ...	Year	Make	Model	Equip. Type	VMRS
Corp	10000003-0...	Customer 10000003-000	2017-09-07			<a href="#">KAB1</a>		2014	FRUEHAUF DIV,FRU...	UNKNOWN	DRY VAN TRAILER	WA-4
Corp	10000003-0...	Customer 10000003-000	2017-09-07			<a href="#">KAB1</a>		2014	FRUEHAUF DIV,FRU...	UNKNOWN	DRY VAN TRAILER	045-
Corp	10000003-0...	Customer 10000003-000	2017-09-07			<a href="#">KAB1</a>		2014	FRUEHAUF DIV,FRU...	UNKNOWN	DRY VAN TRAILER	WA-4
Corp	10000003-0...	Customer 10000003-000	2017-09-07			<a href="#">KAB1</a>		2014	FRUEHAUF DIV,FRU...	UNKNOWN	DRY VAN TRAILER	017-
Corp	10000003-0...	Customer 10000003-000	2017-09-07			<a href="#">KAB1</a>		2014	FRUEHAUF DIV,FRU...	UNKNOWN	DRY VAN TRAILER	045-
Corp	10000003-0...	Customer 10000003-000	2017-09-06			<a href="#">KAB1</a>		2014	FRUEHAUF DIV,FRU...	UNKNOWN	DRY VAN TRAILER	WA-4
Corp	10000003-0...	Customer 10000003-000	2017-09-06			<a href="#">KAB1</a>		2014	FRUEHAUF DIV,FRU...	UNKNOWN	DRY VAN TRAILER	031-
Corp	10000003-0...	Customer 10000003-000	2017-09-06			<a href="#">KAB1</a>		2014	FRUEHAUF DIV,FRU...	UNKNOWN	DRY VAN TRAILER	031-

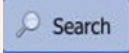
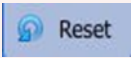



Total Line Costs	Distinct Units	Distinct WOs	Distinct Invoices
GBP 6,203.62	8	26	5

The search criteria on this screen are:

Field	Definition
cost center	view repairs for a specific cost center
invoice date	view repairs for a specific invoice date(s)
task	view repairs for a specific task type
component	view repairs for a specific sub-system component
reason(s)	view repairs for a specific VMRS reason; select is to include or exclude
open date	view repairs for specific work order open dates
close date	view repairs for specific work order close dates

contract	view repairs for specific contracts
assignments	If checked, identifies that without an assignment are to be excluded
unit	view repairs for a specific unit
make/mode	view repairs for specific makes and models
year	view repairs for specific year models
work order	is a free-form text entry field that allows you to select a specific work order to view
invoice	is a free-form text entry field that allows you to view repairs for a specific invoice


### What you can do from here:

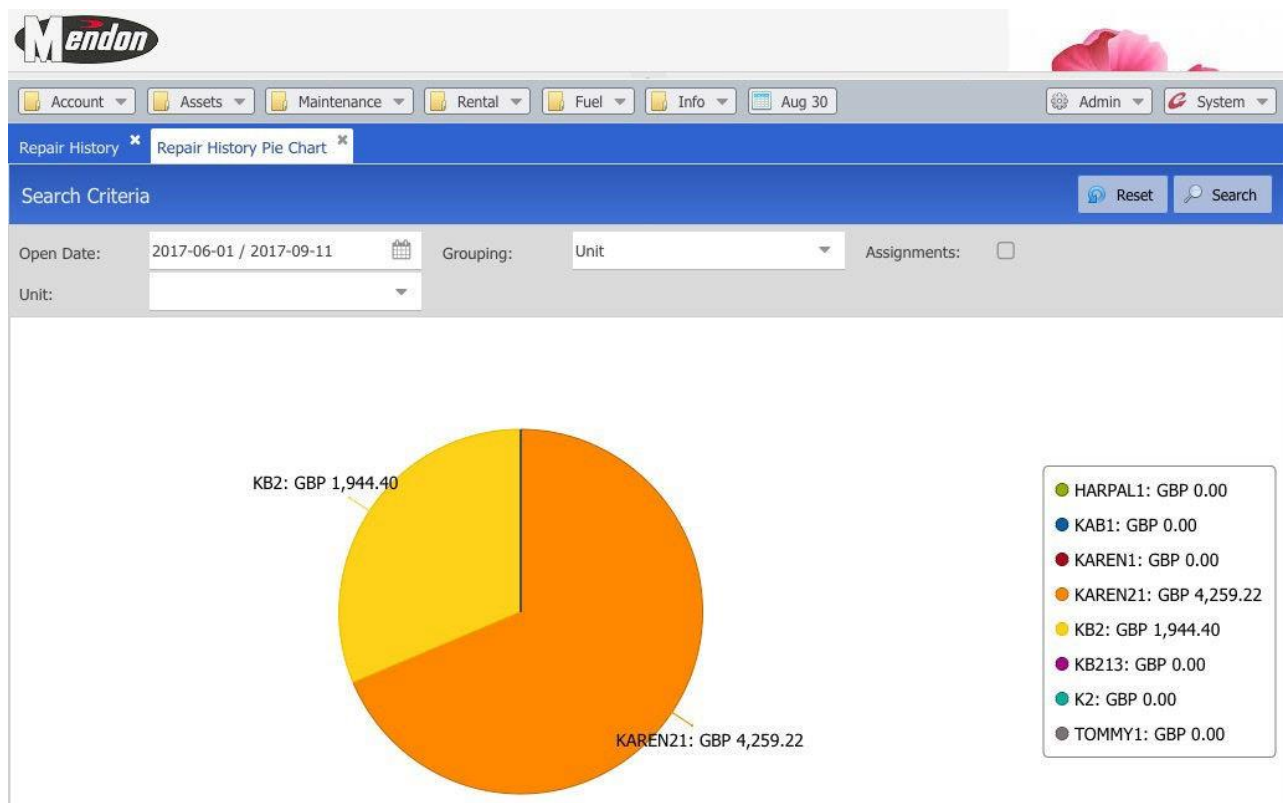
Function	Action	Result
To perform a <b>search</b>	Enter or change search criteria, then click the  Search button	The search will be performed and the search criteria you enter will be remembered for the duration of your session
To <b>reset</b> the search criteria elements to their default values, or to the previously saved search values	Click on the Reset button 	
To view a <b>unit's details</b>	Click on the hyperlink in the <i>unit number</i> column	The <i>Unit Details</i> tab appears
To view an <b>invoice's details</b>	Click on the hyperlink in the <i>invoice</i> column	The <i>Invoice Details</i> tab appears
To view the <b>work order details</b>	Click on the hyperlink in the <i>work order</i> column	The <i>Work Order</i> tab appears
To <b>download</b> the report to an Excel file	Click the  Download Excel button on the top right of the screen	The report will be downloaded and, if you have MS Excel installed on your desktop, it will open the file in Excel for viewing
<p>NOTE: If you are having trouble viewing Excel downloads and you are using IE 7 and Excel 2000 on Windows XP, you should follow the instructions here <a href="http://support.microsoft.com/kb/162059">http://support.microsoft.com/kb/162059</a> to resolve the issue. The issue may impact other versions of the software as well, but it is a confirmed issue on XP/ IE7/Office2000.</p>		
To view a <b>pie chart</b> of the result set	Click on the  (view pie button)	The Repair History Pie Chart tab appears
To view a <b>bar chart</b> of the result set	Click on the  (view bar button)	The Repair History Bar Chart tab will appear

# Repair History Pie Chart

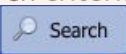
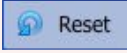
**Purpose:** Repair history allows you to view all work order activity for a particular vehicle. Initially, it displays a summary of each work order line and has links to view work order details, invoice details and, where appropriate, an electronic document of the actual work order completed on the shop floor. This option allows you to view a pie chart of the repair history data.

## How To Get Here:

Start	Action	Result
At the CWA menu	Select <u>Maintenance   Repair History</u>	The <i>Repair History</i> tab appears, with data based on the default search criteria
	Click on the  (View Pie Graph) button	The <i>Repair History Pie Chart</i> tab appears




## What you can do from here:

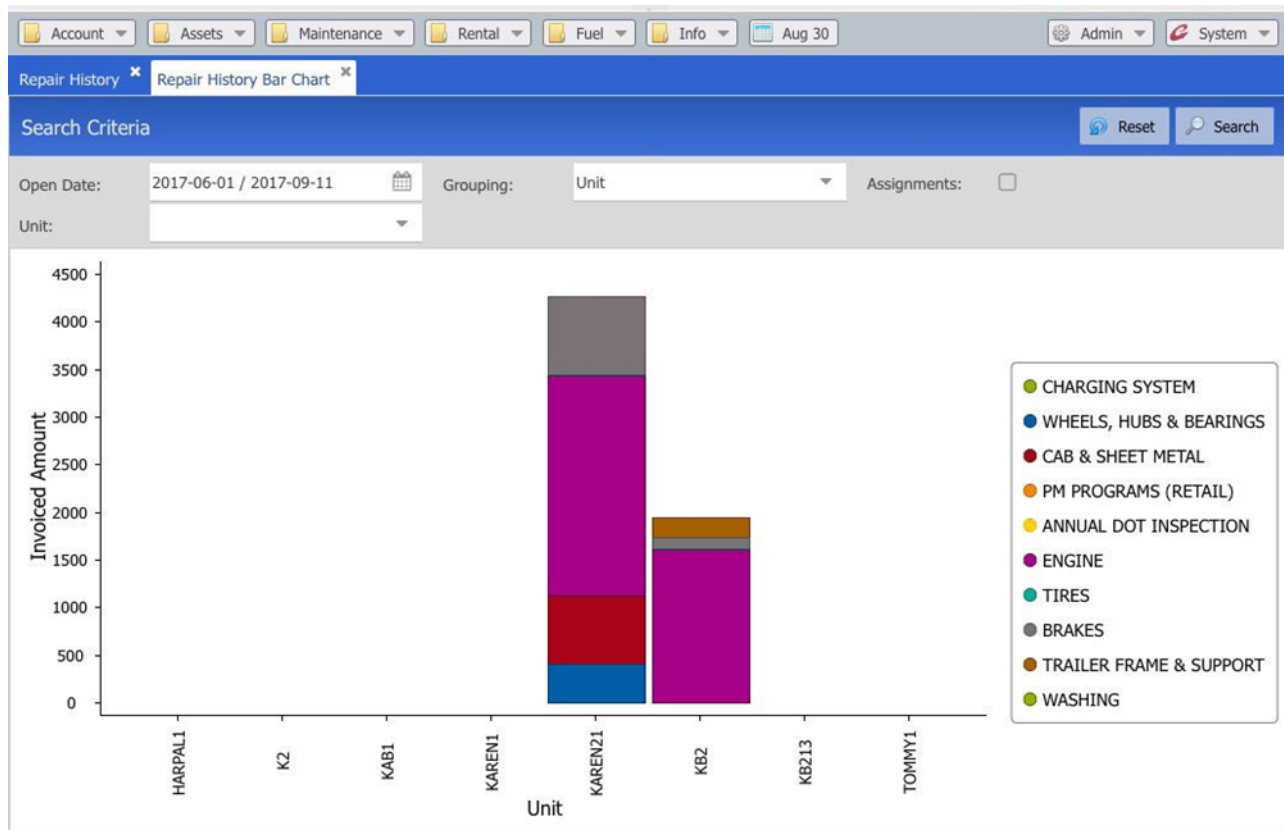
Function	Action	Result
To <b>change the grouping</b> of the information that is being graphed	Enter or change the Grouping selection in the search criteria, then click the  button	The graph changes, e.g. from showing a pie slice for each unit to showing one slice per Location or one slice per Task or one slice per VMRS or one slice per Cost Centre
To <b>reset</b> the search criteria elements to their default values, or to the previously saved search values	Click on the  button	

# Repair History Bar Chart


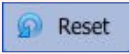
**Purpose:** Repair history allows you to view all work order activity for a particular vehicle. Initially, it displays a summary of each work order line and has links to view work order details, invoice details and, where appropriate, an electronic document of the actual work order completed on the shop floor. This option allows you to view a bar chart of the repair history data.

## How To Get Here:

Start	Action	Result
At the CWA menu	Select <u>Maintenance   Repair History</u>	The <i>Repair History</i> tab appears, with data based on the default search criteria
	Click on the  (View Bar Graph) button	The <i>Repair History Bar Chart</i> tab appears



## What you can do from here:

Function	Action	Result
To <b>change the grouping</b> of the information that is being graphed	Enter or change the Grouping selection in the search criteria, then click the  button	The graph changes, e.g. from showing a bar for each unit to showing one bar per Location or one bar per Task or one bar per Cost Centre or one bar per VMRS
To <b>reset</b> the search criteria elements to their default values, or to the previously saved search values	Click on the  button	

# Work Order Details

**Purpose:** This option allows you to view a work order's details. Note that this screen can be accessed from any work order hyperlink in the system. No information can be changed on this screen.

## How To Get Here:

Start	Action	Result
At the CWA menu	Select <u>Maintenance   Repair History</u>	The <i>Repair History</i> tab appears, with data based on the default search criteria
	Click on the <u>Work Order</u> hyperlink	The <i>Work Order</i> details tab appears, displaying the header details and work order lines for that particular work order

**enrich**

Account Assets Maintenance Rental Fuel Info Admin System

Repair History Work Order 2081809

1 of 2 Automatic Zoom

**enrich**

**Unit Information**

Unit #: BM2  
 Unit Description: 2006 FREIGHTLINER COLUMBIA  
 Year: 2006  
 Make: FREIGHTLINER CORP.  
 Model: COLUMBIA  
 License:  
 Serial #: BM209A6SF70967

**Repair Shop**

Facility: 111  
 Shop: MAIN  
 Priority:  
 Created By: MKC/DONNA  
 Open Date: Feb 08, 2017  
 Close Date:  
 Scheduled Start Date:  
 Requested Completion Date:  
 Status: Open  
 Approval Date:

**Work Order 2081809**

Line	Billable	Reason	Activity	Repair Description	Qty / Hours	Rate	UOM	Tax	Extended
3	B	(01) BREAKDOWN		(003-13) OTHER REPAIRS EXPENDABLE ITEMS					
<b>Complaint:</b> Breakdown Reason: COMDATA 9-Feb-2017 11:28:16 AM Contacted: Comdata Phone Number: Spoke To: Ted Smith Provided Assistance: true Service Fee: <b>Cause:</b> - <b>Correction:</b> -									
<b>Subtotal</b>									0.00
2	S	(01) BREAKDOWN		(013-06) INSPECTION BRAKES					
<b>Complaint:</b> 8-Feb-2017 3:42:43 PM Call from Driver Driver's Name: Jack Anderson Driver's Phone Number: 602-987-1111 Dealer's Description of problem: Pulling to right Driver's Current Location: 691 4989 County Rd 300 E, Buckley, IL 60918, USA Initial Breakdown Reason: BRAKES 9-Feb-2017 11:25:52 AM Contacted: Comdata Phone Number: 401-987-1111 Spoke To: Arney Jones.									

Work Order 2081809  
Page 1 of 2

## What you can do from here:

Function	Action	Result
To <b>print</b> the work order	Click on the Print icon  at the top right of the screen	The Print dialog for your web browser will appear

# PM Calendar

**Purpose:** The PM Calendar shows when you are required to make your vehicles available for service in a calendar format. It will initially display a graphical view of future, outstanding, and booked PMs for the current month.

Each day indicator on the graphical view is color-coded to represent its particular status:

- Light green - In Progress - a work order exists,
- Dark green - In Progress (late) - the work order date is in the past compared to the current date,
- Light amber - Agreed - the work order has an agreed date,
- Dark amber - Agreed (late) - the work order agreed date is in the past compared to the current date,
- Light red - Scheduled - the work roster has an agreed date,
- Dark red - Scheduled (late) - the work roster date is in the past compared to the current date,
- Purple - Planned - a work roster exists, no work order exists, and the work roster has no agreed date

## How To Get Here:

Start	Action	Result
At the CWA menu	Select <u>Maintenance</u>   <u>PM Calendar</u>	The <i>PM Calendar</i> tab appears, with data based on the default search criteria

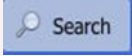
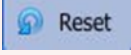
The screenshot displays the PM Calendar interface. At the top, there are navigation tabs for Account, Assets, Maintenance, Rental, Fuel, and Info, along with a date selector set to Aug 30. Below this is a search criteria section with fields for Cost Centre, Contract, Program, Date (2017-10-01 / 2017-12-31), Equip. Type, Location, Unit, and Status. The main area is a calendar grid for unit K2, showing dates from 01 Oct to 26 Nov. Two dates are highlighted: 22 Oct (K2: NEW DRY V) and 26 Nov (K2: PARENT LOI). A legend at the bottom identifies the colors used in the calendar: In progress (light green), In progress (late) (dark green), Agreed (light amber), Agreed (late) (dark amber), Scheduled (light red), Scheduled (late) (dark red), and Planned (purple).

The search criteria on this screen are:

Field	Definition
cost center	view PMs for a specific cost center
date	view PMs for a specific range of dates

unit	view PMs for a specific unit
status	view PMs in a specific status. Possible choices are Agreed, Valid, Overdue, In Progress, Due, and Open
location	view PMs for a specific location

### What you can do from here:

Function	Action	Result
To perform a <b>search</b>	Enter or change search criteria, then click the  Search button	The search will be performed and the search criteria you enter will be remembered for the duration of your session
To <b>reset</b> the search criteria elements to their default values, or to the previously saved search values	Click on the  Reset button	



# PM Planner

**Purpose:** The PM Planner shows when you are required to make your vehicles available for service. A list of future, outstanding, and booked PMs is displayed.

## How To Get Here:

Start	Action	Result
At the CWA menu	Select <u>Maintenance</u>   <u>PM Planner</u>	The <i>PM Planner</i> tab appears, with data based on the default search criteria

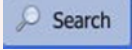


Unit	Cust. Unit	Equip. Type	Location	Due Date	PM	Status	Last WO	Last Compl...	Last R
<a href="#">KB2</a>		DRY VAN TRAILER		2017-09-13	PARENT LOG 20459	Scheduled	<a href="#">20073857</a>	2017-03-13	
<a href="#">K2</a>	KAB12	STRAIGHT TRUCK, ...		2017-09-15	ANNUAL DOT INSPE...	Scheduled	<a href="#">20073099</a>	2016-09-15	
<a href="#">KB2</a>		DRY VAN TRAILER		2017-09-28	CHILD 20459	Planned	0	2017-06-30	
<a href="#">K2</a>	KAB12	STRAIGHT TRUCK, ...		2017-10-24	NEW DRY VAN	Planned	<a href="#">20074002</a>	2017-04-27	
<a href="#">K2</a>	KAB12	STRAIGHT TRUCK, ...		2017-12-01	PARENT LOG 20459	In progress			

The search criteria on this screen are:

Field	Definition
cost center	view PMs for a specific cost center
date	view PMs for a specific range of dates
unit	view PMs for a specific unit
status	Is a specific PM status to view PMs for. Possible statuses are: <ul style="list-style-type: none"> <li>• In Progress - a work order exists</li> <li>• In Progress (late) - the work order date is in the past compared to the current date</li> <li>• Agreed - the work order has an agreed date</li> <li>• Agreed (late) - the work order agreed date is in the past compared to the current date</li> <li>• Scheduled - the work roster has an agreed date</li> <li>• Scheduled (late) - the work roster date is in the past compared to the current date</li> <li>• Planned - a work roster exists, no work order exists, and the work roster has no agreed date</li> </ul>

location      view PMs for a specific location

### What you can do from here:

Function	Action	Result
To perform a <b>search</b>	Enter or change search criteria, then click the  Search button	The search will be performed and the search criteria you enter will be remembered for the duration of your session
To <b>reset</b> the search criteria elements to their default values, or to the previously saved search values	Click on the Reset button 	
To view a <b>unit's details</b>	Click on the hyperlink in the <i>unit number</i> column	The <i>Unit Details</i> tab appears
To view an <b>invoice's details</b>	Click on the hyperlink in the <i>invoice</i> column	The <i>Invoice Details</i> tab appears
To view the <b>work order details</b>	Click on the hyperlink in the <i>work order</i> column	The <i>Work Order</i> tab appears
To <b>download</b> the report to an Excel file	Click the  Download Excel button on the top right of the screen	The report will be downloaded and, if you have MS Excel installed on your desktop, it will open the file in Excel for viewing

NOTE: If you are having trouble viewing Excel downloads and you are using IE 7 and Excel 2000 on Windows XP, you should follow the instructions here <http://support.microsoft.com/kb/162059> to resolve the issue. The issue may impact other versions of the software as well, but it is a confirmed issue on XP/ IE7/Office2000.