

# **Unit Availability**User Guide

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Customer Support is available Monday through Friday, 7:00 a.m. to 7:00 p.m., Eastern Time.

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Web Site: https://community.assetworks.com/hc/en-us

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.

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# **Availability Screens**

The M5 Fleet Management System includes a module for checking vehicle availability or *Unit Availability*. This process is performed through a series of pages or frames that are detailed below.

DESCRIPTION
Availability Unit Status
Availability Requirements
Availability Status Codes
Availability Line Codes
Availability Status Query
Availability Line Query
Availability Required Query
Availability Requirement Query
Operational Class Codes
Operational Entity Groups
Availability Current Status Query
Availability Disposition Codes
Availability Unit Confirmation
Availability Confirmation Query
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#### **User Privileges**

There are five user privileges that are independent of each other. For example, if the user only has the unitavail-comments privilege, then all they can do is update the comments; however, if the user has both unitavail-comments and unitavail-operstat, then the user has the privileges of unitavail-operstat, which includes entering comments.

**UNITAVAIL-Comments** – The user is only allowed to enter comments on the *Availability Unit Status* page.

**UNITAVAIL-Backdate** – The user has full access to *Availability Unit Status* as well as being able to backdate the 'effective date'.

**UNITAVAIL-ConfirmCt** – When the user is confirming the count on *Availability Confirmation Count*, a userid and password will be required.

**UNITAVAIL-Justify** - needs to be set in conjunction with system flag 2038. If the user is authorized to override the below requirements message, then this needs to be set.

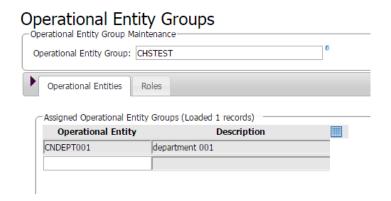
**UNITAVAIL-OperStat** – The user can only change the operational status, effective date, estimated days OOS and comments on the *Availability Unit Status* page.



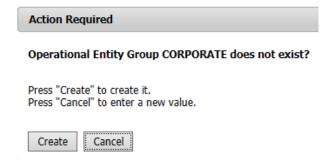
# **Operational Entity Groups**

Operational Entity Groups are just like location groups. They are used for querying and reporting purposes. From this page, the user can create an entity group that includes whichever operational entities that could possibly be grouped together for both reporting purposes and for entry of confirmation counts. In order to give a user access to enter confirmation counts, an operational entity group must be assigned to the database user as shown below.

NOTE: An operational entity is whatever the value that was setup in the system flag 2032. If the flag was set to using department, then you would only see those using departments that have units with an operational class.

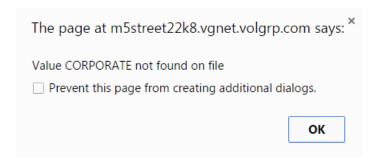


1. Enter the name of the new entity group and press<Tab>. The following will display.





- 2. Click <Create> in order to continue or click <Cancel> to start over.
- 3. Double-click in the *Operational Entity* field or use the binoculars icon to view the available operational entities. A list of all available entities will display.
- 4. Double-click on the desired entities. You will be returned to the OPERATIONAL ENTITY GROUP page where the description of the department will display. If the department entered is not a valid operational entity, the following will display.



- 5. Continue to enter as many entities as needed for the newly created group.
- 6. Click <Save> when complete.

Once the operational entity group is created, it can then be tied to any database users who should have access to those departments when performing queries or entering confirmation counts.

# **Setup for Entering Confirmations**

In the DATABASE USER MAINTENANCE frame there is a <Tab>, Locations/Oper Entities, which allows/disallows users to enter confirmation counts. From this page, select the desired user and click on the "Location/Oper Entities" tab and scroll down to *Operational Entities*. Refer to the section, "Creating Operational Entity Groups" for further information.



All 'Operational Entities' (which are really operational entity groups) that the current user should be able to enter confirmation counts for should be in the column 'Authorized Operational Entities'.

# Database User Maintenance -User Information -User ID: ALANR Description: Alan Remple Status: Active Password: \*\*\*\* Used By Roles (Record 1 of 1) ALANR Location Maintenance Unauthorized Location Groups Authorized Location Groups 01MAIN 02SERV 03BODY 04NAFM 05CPYD 06CPCH 07REFU 08KINN 09ADMN 10ROON Default Location Group: Operational Entities Unauthorized Operational Entities ✓ ✓ Authorized Operational Entities WHAT\_THE >>



#### **Set Up of System Flags:**

#### **Asset Management:**

# Operational entity: 1-Using,2-Owner,3-Parking,4-Maint,5-Own/Park,6-Own/Maint (#2032)

The flag defines the search criteria for the *Operational Entity* queries. This flag determines what is an operational entity. For example, if 1 is selected, then all units that have an operational class, their using department will then become an operational entity, which then can be used for querying.

#### Availability reporting entity label (# 2033)

By entering a label here, the user is indicating how the name should appear for either column headings within reports or the search criteria within the availability queries. The default is "Using Department".

NOTE: If the user changes the value in this flag at any time, a TMS script needs to be run: *Update\_Oper\_Entity\_Label\_Orc.TMS*.

#### Availability reporting rollup entity (#2034)

This flag determines to which level of the organization (as determined in the Department Corporate Hierarchy frame) the reports will roll up. The default is 1.

Show insufficient unit availability warning Y)es, N)o, J)ustify to continue (#2038)



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Setting this flag to 'N' will show no message even if unit availability becomes insufficient. Setting this flag to 'Y' or 'J', will force a popup warning on the Availability Requirements page upon saving changes.

#### Availability Requirements example:

"Unit availability is below the requirement for DISPATCH 14606,

Operational Class C, Operational Line CITY-PM, because the requirement

has been raised."

If the system flag is set to 'J', then when the AVAILABILITY UNIT CONFIRMATION page is accessed, the user must enter an authorized user name and password and justify the deficiency. The database user must have the privilege, UNITAVAIL-JUSTIFY.

#### Requires EST DAYS OOS in Availability Unit Status? (#2042)

Setting this flag to 'Y', will force the user to enter the estimated days that they believe the unit will be out of service in Availability Unit Status. 'Y' is the default.

#### Allow Confirmation on a Holiday/Weekend (#2052)

Setting this flag to 'Y' will allow the user to enter confirmation counts in the Availability Unit Confirm page on holidays and weekends based on the fiscal calendar.

Unit Availability is maintained for Non-Revenue Units? (Y/N) (#2128) - Setting this flag to "Y" enables Unit Availability and Operational Class to be maintained for Non-Revenue Units.



**Default Operational Status Code (#5072)** – When entering an operational class to a unit for the first time, what is the default operational status that should be assigned to that unit. Usually an 'available' operational status code is entered here. The operational status code must be a valid code that has already been created in the AVAILABILITY STATUS CODES page.

#### **Workflow/Shop Management:**

#### Prompt for Operational Status from Work Order Process Y)es, N)o, (# 2040)

If "N", current M5 work order functionality will be maintained. If "Y", the AVAILABILITY UNIT STATUS page will appear, allowing the user to view the current status of the unit and/or update the status. This operates per work order, not per job.

#### Advanced Availability? A - Advanced, L- Limited, S- Standard (#5075)

When set to "A" advanced unit availability warning messages will display. The operational status frame cannot be closed by the user when opening a new work order and the unit will automatically be set back to available when closing a work order. In addition when taking a unit out of service the user will be prompted to open a work order. When set to "L" limited unit availability the operational status frame can be closed by the user without changing the operational status. When set to "S" standard unit availability the operational status frame cannot be closed by the user without changing the operational status when a work order is opened. Also, when the user completes or closes the work order they will also be prompted to change the operational status.

**Estimated OOS format? (1 - OOS by Day, 2 - OOS by Date) (#5086)** - If set to "1", the user will only have the ability to enter the estimated OOS days as an integer value on the AVAILABILITY UNIT STATUS page. The estimated complete field will be protected



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and entry will not be allowed. This integer value will be used to calculate the estimated OOS complete date. If set to "2", the user will only have the ability to enter the estimated complete OOS date on the AVAILABILITY UNIT STATUS page. The estimated OOS days field will be protected and entry will not be allowed. This date value will be used to calculate the estimated OOS days and cannot be greater than 365 days out if flag 5075 is set to "A".

Journal OOS and Estimated Complete Changes? (1 - Do Not Journal, 2 - Journal) (#5087) - If set to "1", Unit Availability will journal operational status history changes based on an update to the Status, OOS days or effective date. All other modifications will update the existing operational status history record. If set to "2". Unit Availability

will update the existing operational status history record. If set to "2", Unit Availability will journal operational status history changes for every change. No update to existing records will take place.

**Estimated Completion Date Outside Limit (#5088)** - This flag sets the number of days into the future that the estimated completion date and time can be set. Setting this flag to "0" (zero) will not enforce an outside date and time limit. The estimated completion date and time can be set as far into the future as the user desires. When module flag 5075 is set to "A" for Advanced Availability the user value of this flag cannot exceed 365.

**END OF System Flags** 



#### **Creating Availability Line Codes**

The page, AVAILABILITY LINE CODES, sets up the number of times throughout the day a user may check available units in the fleet as well as the earliest time that confirmation counts can be made for that line. For example, if 8:00 am is early morning rush, a line is inserted in the page to allow the user access to the units' availability process.

At least one line needs to be defined in order to use the Unit Availability module.

1. Click on the AVAILABILITY LINE CODES menu item.

#### Line Code Maintenance (Loaded 4 records) Line Confirm Time Description Line Time AΜ 01:00:00 03:00:00 AM LINE EARLY 01:05:00 02:05:00 EARLY SHIFT EVE 12:00:00 15:00:00 EVENING SHIFT PM 13:00:00 18:00:00 PM LINE

#### Availability Line Codes

- 2. Enter the name of the *Line* you wish to track in the *Line* field and press <Tab>. The line can be up to 10 characters.
- 3. If you are not using confirming the number of units available for your line, then *Confirm Time* field can be skipped; otherwise, the *Confirm Time* is the earliest time that confirmation counts can be entered and press <Tab>. In the example above for the 'AM' line, confirmation counts can only be made between 3:30 am and 7 am each day. All times must be entered in military time format. The confirmation time cannot be greater than the 'line time' for the entered line.
- 4. Enter the peak time to check availability and see the number of units available for the entered time in the *Line Time* field and press <Tab>. The 'line time' cannot be less than the 'confirmation time' for the entered line.



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- 5. Continue to enter as many lines as needed.
- 6. Click the <Save> icon when complete.

# **Creating Operational Class Codes**

Prior to their individual assignment at the unit level, Operational Class Codes must be established through the OPERATIONAL CLASS CODES frame. Click in the next available row and enter the user defined *Class* and *Description*.

#### Class Code Maintenance (Loaded 41 records) Description Disabled III Class AMBULANCE Ambulance BOAT Boat CARGO VAN Cargo Van CARWASH Vehicle Car/Truck Wash CHIPPER Chipper CLAW Claw COMPCT TRK Compact Truck COMPRESSOR Compressor DUMP TRK Dump Truck F LOADER Front Loader FIRE TRK Fire Truck FORKLIFT Forklift FUELISLAND Fuel Island FULL TRK Full Size Truck GENLD Dortable Generator

# Operational Class Codes

The Class code can be up to 10 characters and the Description up to 30 characters.

By selecting *Disabled*, the corresponding operational class can no longer be assigned to a unit.



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Once the class codes are established, they can then be assigned to the unit in UNIT MAIN under the "Employee/Class" tab.



# **Availability Disposition Codes**

Use the AVAILABILITY DISPOSITION CODES page to set up the dispositions/reasons available to the units. The 1-character disposition code is tied to the Availability Status Codes for reporting purposes.

# Disposition Codes (Loaded 6 records) Code Description Disabled Available Availability Code Change OOS Onsite Priority B Availability Code Change

# Availability Disposition Codes

Disposition codes 1 and 4 are hardcoded as many reports and query frames use these two disposition codes. The description is editable (up to 30 characters), but 1 is normally available and 4 is offsite.

By selecting *Disabled*, the corresponding disposition code can no longer be tied to a availability status code.



#### **Availability Status Codes**

Use the AVAILABILITY STATUS CODES page to set up the reasons why a unit may be out of service. The 3-character user-defined *Status* code is then tagged a disposition code. For example, if a unit has a minor repair, but is still operational, a status code would be created as shown below. For reporting purposes and querying, AVL and MRR are both marked with a disposition code of available meaning that if I were to query on disposition code '1', all units that have an availability status of AVL and MRR would display.

#### Status Code Maintenance (Loaded 11 records) Status Disposition Wait For Mate Flag Disabled !!!! Description Code AVL 1 Available UAB Unit at Body Shop (Fleet) UAV Unit At Vendor WFA Waiting For Assignment WFD Waiting For Decision WFM 3 Wait For Mating WFT Waiting For Tow WIP 2 Work In Progress WPA Waiting For Parts-Available WPU 3 Waiting For Parts-Unavailable

# Availability Status Codes

Description can be up to 30 characters.

By selecting *Disabled*, the corresponding status code can no longer be utilized.



# **Availability Unit Status**

This page is used to maintain any and all operational statuses for a unit along with a date and timestamp. If flag 2040 has been set to "Y", then this page will automatically display when a work order is created, cancelled, completed or suspended; however, this page can also be accessed outside of the WO.

To access this content 2 page, go to the AVAILABILITY STATUS HISTORY QUERY page and query on the unit to be viewed. Once the tablefield is populated, double-click on the word, NEW, under the *Oper Status* column in order to change the status of the unit.

Upon entering the 'Unit', the most current status will display. To change the status, <TAB> to the *Operational Status* field and enter the new status followed by entering a new *Effective Date*, *Est. Days OOS* or *Est. Complete Date* and any related *Comments*. Based on flag 5086, determines whether the user enters an *Est. Days OOS* or *Est. Complete Date*. *Effective Date* cannot be a future date or a date prior to the most recent effective date. If the user has already confirmed, the effective date and time cannot be prior to the confirmation time.

# Availability Unit Status





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When opening a WO for a unit and the user goes to <Save>, depending on the system flag setting, *Availability Unit Status* will display. The user must then change the operational status with the idea being that you would not be opening a WO unless there was a problem, which means the status should change. If the user tries to <Save> without making a change, a message will display indicating that the operational status must be changed.

The user is then forced to change the operational status before this frame can be saved.

A feature has been added to WORK ORDER MAIN under which justification is required when a new work order would put a class of units below the availability requirement. A frame pops up with the standard message describing the deficiency and requests an authorized user id and password (if the user does not have the user privilege, *Justify Unit Deficny*). Notes justifying the deficiency must also be entered. These notes are added to the work order notes.

Only users with the user privilege 'JUSTIFY UNIT DEFICNY' (justify unit deficiency) are allowed to justify a unit deficiency.

If the login user has the authorization, the program detects this, and fills in the user and password. If a different user needs to be the justifier, just click into the user and password fields and overwrite the values shown there. If the login user does not have the authorization, the cursor lands in the user field, and the user will need to enter his user code and password.

System flag 2038, 'Show insufficient unit availability warning Y)es, N)o, or J)ustify to continue.', needs to be set to 'J' for the justification prompting to occur.

The same functionality will occur when the WO is completed. Only this time, the operational status will automatically display 'AVL' or whichever operational status is set to disposition code of 'Available'. This can be changed, but the idea is that if the WO is complete, the unit should be leaving the garage, which means it is available for use.



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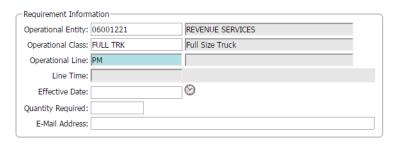
If a WO is 'cancelled' and there are no other open work orders for that unit, the operational status will be automatically changed to the status that was entered in system flag 5072.



#### **Availability Requirements**

This page contains the number of units required (by class) for a particular entity at a specific time as shown below:

#### **Availability Requirements**



When the number of units required changes, enter this page and enter the new *Effective Date* and *Quantity Required*. An e-mail will be sent to any address entered in *E-mail Address* indicating the changes made.

Clicking on <Find> for the *Operational Entity* will only display those departments that have units with an operational class. Double-click on the desired department and press <Tab>.

Enter the type of unit required for the entered operational line in the *Operational Class* field and press <Tab>.

Enter the line that needs requirements in the *Operational Line* field and press <Tab>.

The current date will display in the *Effective Date* field. This is the date the entered requirements are to go into effect. To change the date, just type over the highlighted date. Future dates can be entered. Backdating is permitted if the user has the proper privilege.

Enter the number of units required for this line in the *Quantity Required* field and press <Tab>.

If a user is to be notified when requirements change, enter their email address in the *E-Mail Address* field. Press <Save> when complete.



If the user deletes the current record, the previous 'Quantity Required' will be in effect.

#### **Availability Unit Confirmation**

This page allows the user to confirm the number of units that are out of service for a given operational entity, line, and date provided the user has the privilege, *UNITAVAIL-CONFIRMCT* and has authority for the entered operational entity. Once the date is entered, the confirmation time will be the system time at that moment when <SAVE> is completed.

# Availability Unit Confirmation

History Information —			
Operational Entity:	CNDEPT001		department 001
Operational Line:	AM		AM LINE
Confirm Date:	10-20-2015 13:19:27	8	
User ID:			
Password:			
Units Out Of Service:			

Once an operational entity and line are entered, the confirmation date must be entered. If System Flag 2052 is set to 'N' and the date falls on a weekend or holiday, a message will display, "You cannot confirm on a weekend" or "You cannot confirm on a holiday". If the user enters a date that is outside of the time range set in Availability Line Codes, a message will display indicating that the date is either too early or too late.

A message will display as indicated below.

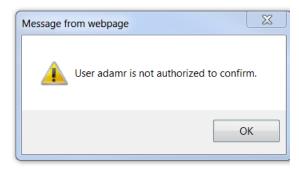


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The user will not be able to continue until the date and time fall within the *Confirm Time* and the *Line Time* on the **AVAILABILITY LINE TIMES** frame.

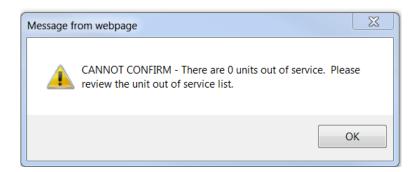
Once the *Confirm Date* is accepted, the user will then be prompted to enter their user ID and password. The user ID and password will only be accepted if the privilege, UNITAVAIL-CONFIRMCT has been set up for the user. If they do not have the privilege, the following will appear.



Once the userid and password have been accepted, then the user can enter the number of out of service units for the current time and date. If the number of units out of service is different than what M5 has, a message similar to the one below will be displayed.



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The user cannot save until the out of service count is the same as what M5 indicates.

Multiple confirmations can be made for a particular operational entity and line as long as the date and time fall within the appropriate range. "Availability Confirmation Query" will only display the latest or most recent confirm time.

Technical note: To see how many times a particular unauthorized user tried to confirm, there is a field confirm\_ct in the table oper\_confirm\_hist.



#### **Availability Confirmation Query**

This frame displays for a selected rollup entity, line and confirm date, all operational entities and their respective confirmation times as shown below.

# Availability Confirmation Query History Information Operational Line: AM Rollup Entity: SERV1 Confirm Date: 10-20-2015 Confirm Date: 10-20-2015 Confirmed and Unconfirmed Operational Entities (Loaded 1 records) Oper Entity Entity Description Oper Entity Entity Description Over Status Unconfirmed

If no selection criteria is entered, all operational entities for all rollup entities will display depicting the latest confirmation time regardless of which line. History can also be seen by entering any *Confirm Date* is necessary.

# Availability Confirmation Query



In the example above, no one has yet confirmed that their units meet their time and requirements.

The user can create another query by clicking on <Clear>.



# **Availability Status Query**

Shows operational status history per unit based on the selection criteria. Selection criteria include 'Operational Entity', 'Operational Class', 'Disposition', 'Operational Status' or 'Unit No.'. If only the most recent status is required, click on the *Query By* pull-down to select "Date". If you wish to query on all units of a particular operational status, again click on the *Query By* pull-down to select "Status". Once the selection criteria is entered, click on the <Retrieve> icon to display the data.

#### Availability Status Query History Information Operational Entity: ▼ Unit Number: Operational Class: Query By: None ▼ Select one to provide more query information Retrieve Date Clear Unit Operational Status History (Loaded 0 records) Operational Operational Operational **Effective Date** Login User 🏢 Entity Class Status Code

To re-query, click on the <Clear> icon.



#### **Availability Line Query**

The AVAILABILITY LINE QUERY page allows the user to query line history by 'Operational Entity'. The user can also search by class, line or effective date by clicking on the *Query By* pull-down. Depending on what you query by as to what fields display below that field. If 'None' is selected, then no other fields will be available to query by.

All lines are displayed along with number of units required and effective date. If entering a date range, only those line requirements that actually changed within the selected date range will display.

#### Availability Line Query History Information Operational Entity: ▼ 0120 VP, EXTERNAL AFFAIRS Operational Class: Query By: None ▼ Select one to provide more query information Clear Retrieve Operational Line Requirement History (Loaded 3 records) Operational Operational Operational Units Effective Date Line Time Required Class 15:00:00 06-08-2011 07:00:51 0120 EVE BWHL 0120 AM 03:00:00 FLDR 09-04-2015 12:39:16 0 0120 09-04-2015 12:37:50 AM 03:00:00 FLDR

To re-query, click on the <Clear> icon and reenter the desired selection criteria followed by clicking on <Retrieve>.

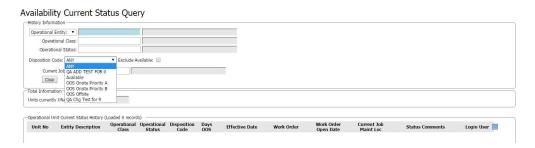


#### **Availability Current Status Query**

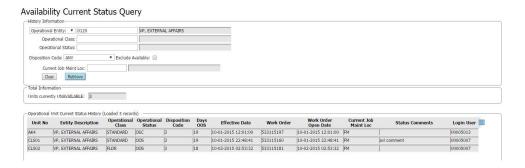
The AVAILABILITY CURRENT STATUS QUERY page gives the user the ability to display the status of various units for a selected operational entity. Further selection criteria include class, status and disposition code. Unit number, status, dispositions, days out of service, effective date, comments and the login ID of the person who changed the status is displayed based on the selection criteria.

To query by 'operational entity group', click on the pull-down arrow for *Operational Entity* and select 'Operational Entity Group'.

To query on a particular disposition code, click on the *Disposition* Code pull-down and highlight the desired code.



If there is no 'operational class', it means that the unit is a non-revenue unit. Also, once a unit is sold, it will no longer display in this frame.



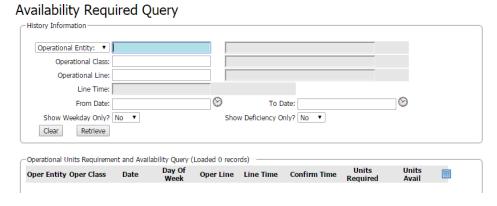


Notice that the total number of unavailable units for the entered selection displays in the *Units Currently UNAVAILABLE* field.

To re-query, click on the <Clear> icon and reenter the desired selection criteria followed by clicking on <Retrieve>.

#### **Availability Required Query**

The AVAILABILITY REQUIRED QUERY page gives the user the ability to view the number of units required versus number of units available per entity, line, and class. The required selection criteria fields are 'Operational Entity', 'From Date' and 'To Date'. The user can also select to display weekdays only and/or deficiencies only.



The calculations for 'units required' and 'units available' are based on the confirm time. If there is no confirm time, the calculations will be based on real-time. To re-query, click on the <Clear> icon and reenter the desired selection criteria followed by clicking on <Retrieve>.



#### **Availability Status History Query**

The AVAILABILITY STATUS HISTORY QUERY page provides the ability to display the operational status for a selected unit number. Further selection criteria includes operational status, disposition code, effective date and work order number.

Functionality to update rows has been added to rows that have a work order number. By clicking the hyperlink of the work order number the AVAILABILITY UNIT STATUS page will display allowing the user to make updates. Rows that do not have a work order number cannot be edited.

The user also has the ability to add a new operational status by clicking the row marked 'NEW'. See the section, "Availability Unit Status", for further information on utilizing this page.



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#### Availability Status History Query

