AssetWORKS

Integrations System

User Guide

Version 24.x
Last Modified 24.3 | September 2024

© 2024 AssetWorks Inc., its subsidiaries and affiliates. All rights reserved.

Private and Confidential. Not for public dissemination.

Information contained in this document is proprietary to AssetWorks Inc. and may be used or disclosed only with written permission from AssetWorks Inc. This guide, or any part thereof, may not be reproduced without the prior written permission of AssetWorks Inc. This document refers to numerous products by their trade names. In most, if not all, cases these designations are claimed as Trademarks or Registered Trademarks by their respective companies. This document and the related software described in this manual are supplied under license or nondisclosure agreement and may be used or copied only in accordance with the terms of the agreement. The information in this document is subject to change without notice and does not represent a commitment on the part of AssetWorks Inc. The names of companies and individuals used in the sample database and in examples in the manuals are fictitious and are intended to illustrate the use of the software. Any resemblance to actual companies or individuals, whether past or present, is purely coincidental.

Technical Support

AssetWorks provides several ways to connect with the Customer Support team. Be prepared to provide detailed information to the representative. If you are reporting an issue by email, include screen shots of your problem. This will provide the Customer Support representative with the information needed to respond quickly and effectively.

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

Telephone: 1-610-225-8300

Email: M5Support@AssetWorks.com

Website: Community.AssetWorks.com

The support website can be used to open issues, subscribe to user groups and download documentation, as well as to access the latest AssetWorks news. For secure access to the website, contact Customer Support by calling the number above.

Integrations System - User Guide

Version 24.x

Last Modified 24.3 | September 2024

Contents

Expanded Interfaces **7**

1. Commercial Fuel Template **8**

Interface and Screen Names 9

Interface Manager 10

Interface Parameters 11

Interface Parameter Explanations 11

Sample Data 13

Current Execution Schedule 14

Schedule Details 14

Interface Reject Manager 16

Error Processing 17

2. In-House Fuel Template **18**

Setup and Configuration 18

Product Main 19

Product Setup Unit 20

Location Main Fueling Location 21

Interface and Screen Names 22

Interface Parameters 24

Interface Parameter Explanations 24

Sample Data 26

Comma: 27

Fixed: 27

Pipe: 27

Semicolon: 27

Tab: 27

XML: 27

Current Execution Schedule 28

Schedule Details 28

Interface Reject Manager 30

Error Processing 31

3. Part Purchase Order Export **32**

Interface and Screen Names 32

Interface Manager 33
Interface Parameters 34
Interface Parameter Explanations 34
Sample Data 35
Current Execution Schedule 36
Schedule Details 36
Error Processing 37
4. Part PO Receipt Template 38
Interface and Screen Names 38
Interface Manager 39
Interface Parameters 40
Interface Parameter Explanations 40
Sample Data 42
Current Execution Schedule 44
Schedule Details 44
Interface Reject Manager 46
Error Processing 47
Additional Considerations, Configuration, and Processing Logic 47
5. WO Transaction Template 49
Interface and Screen Names 49
Interface Manager 50
Interface Parameters 51
Interface Parameter Explanations 52
Sample Data 54
Current Execution Schedule 56
Schedule Details 56
Interface Reject Manager 57
Error Processing 59
6. Expanded Interface File Data 60
Commercial Fuel Template 60
In-House Fuel Template 62
Part Purchase Order Export 64
Part PO Receipt Template 66
WO Transaction Template 68
Standard Interfaces 79
1. Item Load (File) 79
Interface and Screen Names 80
Interface Manager 81
Interface Parameters 82
Interface Parameter Explanations 82

File Data ... 83
Sample Data ... 84
Current Execution Schedule ... 85
Schedule Details ... 86
Interface Reject Manager ... 87
2. Employee/Driver Load ... 89
Interface and Screen Names ... 89
Interface Manager ... 90
Interface Parameters ... 91
Interface Parameter Explanations ... 91
Sample Data ... 93
Current Execution Schedule ... 94
Schedule Details ... 94
Interface Reject Manager ... 96
Error Processing ... 97
3. Vendor Load ... 105
Interface and Screen Names ... 105
Interface Manager ... 106
Interface Parameters ... 107
Interface Parameter Explanations ... 107
Sample Data ... 109
Current Execution Schedule ... 110
Schedule Details ... 110
Interface Reject Manager ... 112
Error Processing ... 113
Additional Considerations ... 113
Vendor Load ... 114
4. Unit Meter Load ... 118
Implementation ... 118
Interface and Screen Names ... 119
Interface Manager ... 120
Interface Parameters ... 121
Interface Parameter Explanations ... 121
File Data ... 122
Current Execution Schedule ... 124
Schedule Details ... 124
Interface Reject Manager ... 126
Error Processing ... 127
5. Standard Part Upload ... 128
Interface and Screen Names ... 129

Interface Manager 130
Interface Parameters 131
Interface Parameter Explanations 131
File Data 132
Current Execution Schedule 136
Schedule Details 137
Interface Reject Manager 138
6. Tech Spec Load 140
Interface and Screen Names 141
Interface Manager 142
Interface Parameters 143
Interface Parameter Explanations 143
File Data 145
Sample Data 149
Current Execution Schedule 153
Schedule Details 153
7. Test Suite Load 155
Interface and Screen Names 155
Interface Manager 156
Interface Parameters 157
Interface Parameter Explanations 158
Test Suite Sample Data 160
Test Suite File Data 163
Current Execution Schedule 174
Schedule Details 174
Interface Reject Manager 176
Error Processing 177
8. Unit Load 178
Interface and Screen Names 179
Interface Manager 180
Interface Parameters 181
Interface Parameter Explanations 181
Template 183
Data 184
Current Execution Schedule 188
Schedule Details 188
Interface Reject Manager 190
Error Processing 191
Updates 192

Expanded Interfaces

These expanded interfaces perform various functions that save organizations the time and effort required to manually process large amounts of data.

These interfaces are available to licensed customers only. Please contact AssetWorks Customer Support (1-610-225-8300, M5Support@Assetworks.com) or your project manager for more details on purchasing.

Expanded interfaces:

- Commercial Fuel Template
- In-House Fuel Template
- Part Purchase Order Export
- Part PO Receipt Template
- WO Transaction Template

1. Commercial Fuel Template

The Commercial Fuel Template Interface accepts and processes fuel transaction information into M5 fueling system. This functionality saves organizations the work of manually keying in large amounts of data.

The interface will update commercial fuel transactions based on:

- Valid products
- Quantity
- Cost
- Vehicle mileage

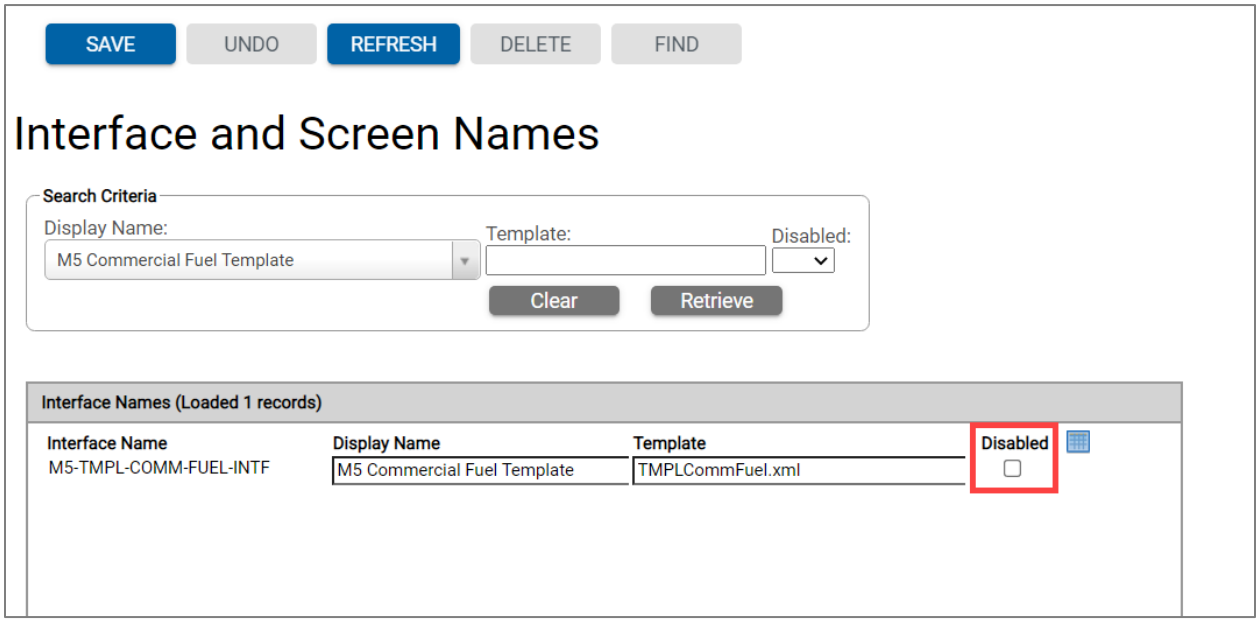
In addition to the configuration and setup instructions that follow, the interface will also need M5 to be set up to treat the fuel as an expense or commercial product, which requires the appropriate configuration in M5 for the following:

- **Product Main** – You must set up and configure product codes to define the type of fuel being processed.
- **Vendor Main** – You must set up an M5 Vendor Main record for the outside fuel vendor.
- **Product Setup Unit** – You must set up fuel types and tank capacities for all applicable units.
- **Location Main Fueling Location** – You must designate a location as a valid fueling location for the interface parameter, **Default Location**.

This interface is available to licensed clients only. Please contact AssetWorks Customer Support (1-610-225-8300, M5Support@Assetworks.com) or your project manager for more details on purchasing.

Interface and Screen Names

Before you can run the interface, make sure the interface is enabled for use.



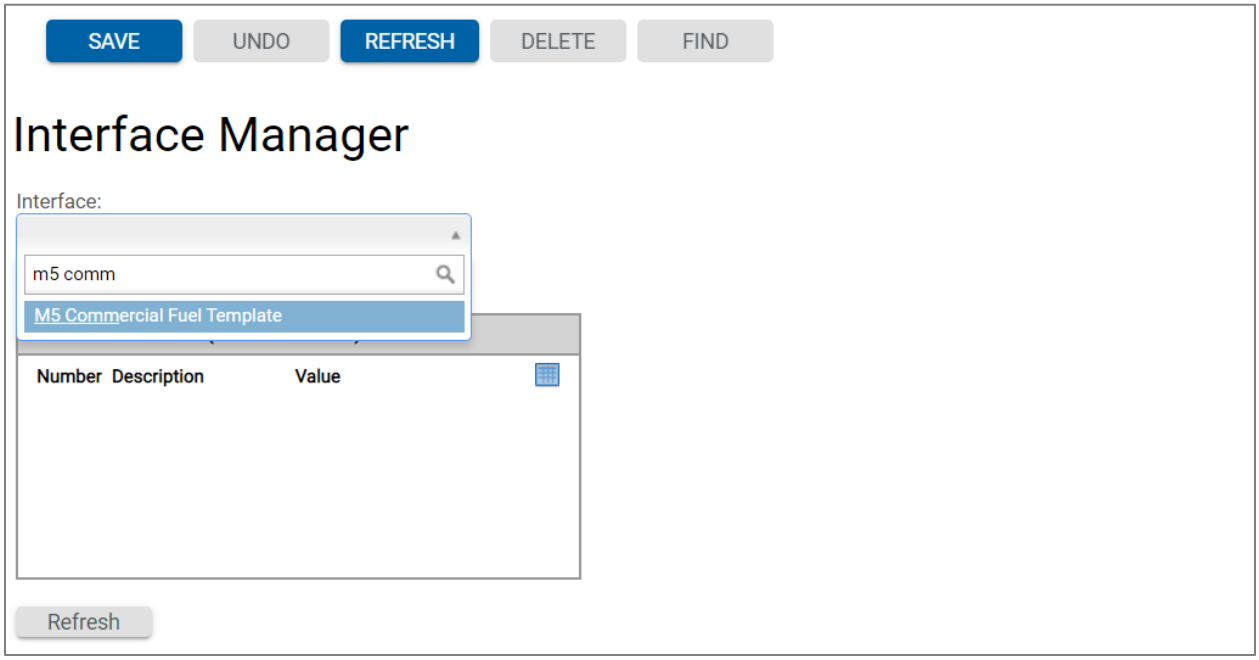
To verify:

1. Navigate to the **Interface and Screen Names** frame.
2. Scroll the list until you find: **M5-TMPL-COMM-FUEL-INTF** on the list. Alternatively, you can search for the interface in the **Display Name** dropdown and select the **Retrieve** button.
3. Make sure the **Disabled** checkbox is cleared.
4. If it is selected and you want to run the interface, clear the checkbox and select **SAVE**.

Interface Manager

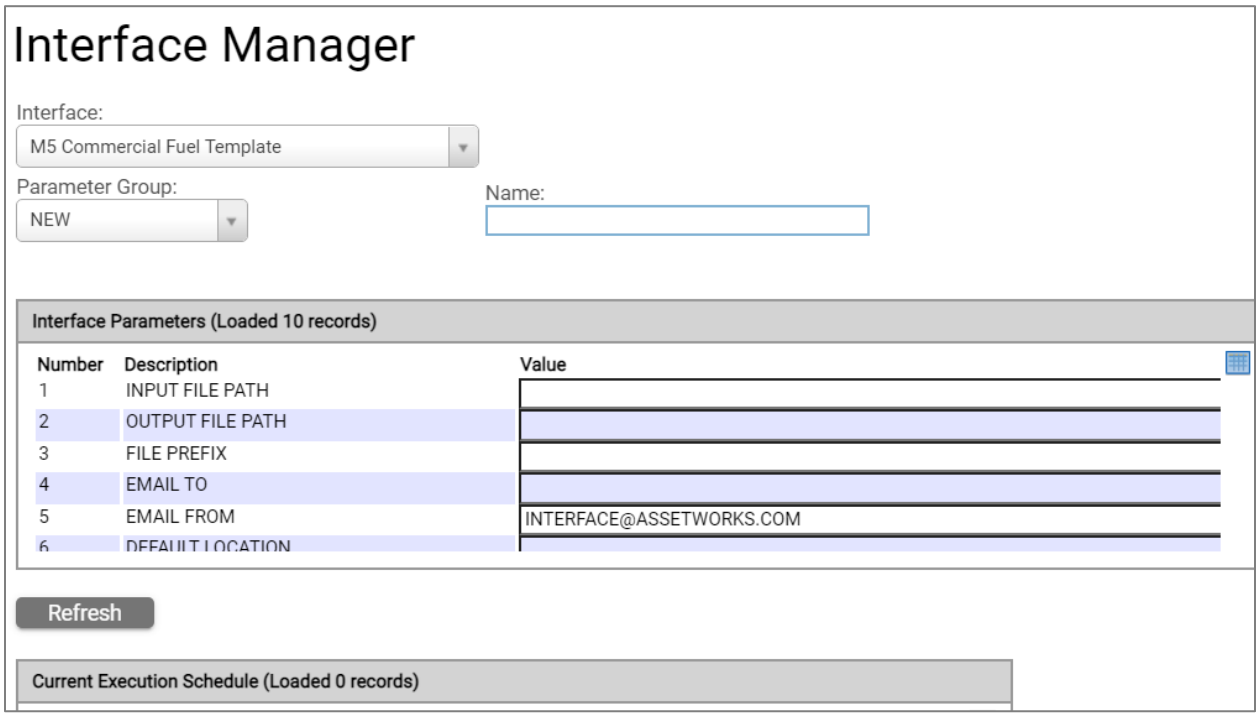
After verifying that the interface is enabled for use, navigate to the **Interface Manager** frame. To locate the interface, select from the dropdown list or enter the name.

After you select the interface from the dropdown, Interface Parameters, Current Execution Schedule, and Schedule Details display.



- You can select an existing **Parameter Group** from the dropdown.
- If this is your first time using the interface, the only option will be NEW. You can use this option to create and save a new parameter group for future use.
- To create a new group, select NEW from the dropdown, enter a name in the **Name** field, define parameter values (explanations below), and select the **SAVE** button.
- You can also run the interface without saving your parameters.

Interface Parameters



Interface Parameter Explanations

Parameter Name	Description	Required (Y/N)
INPUT FILE PATH	File path where the input file will be found by the interface program. Note: This path refers to the C: drive on the batch server. The directory name should not end with a "\", and can either be a mapped drive (C:, Q:, etc.) or with a \\server name\share\directory format. The interface processes any files found in this directory with a .csv extension.	Y

Parameter Name	Description	Required (Y/N)
OUTPUT FILE PATH	File path where the file will be moved upon completion of the interface. Note: This path refers to the C: drive on the batch server. The directory name should not end with a "\", and can either be a mapped drive (C:, Q:, etc.) or with a \\server name\share\directory format. The file is renamed with the date and time. For example, a file named WODATA.csv will be renamed as WODATAyyyymmddhhmmss.csv where yyyymmdd represents year/month/day and hhmmss represents hour/minutes/seconds.	Y
FILE PREFIX	This is an optional parameter that allows you to specify a part of the file name that will be added to the beginning of each processed file as a prefix.	N
EMAIL TO	User or Account to whom any email updates will be sent upon the interface run. If you need multiple emails to receive these notifications, it is recommended to create a distribution group on the mail server that consists of those email addresses. Completion emails will include a count of good and bad records. The email will also include a list of files processed by the interface run.	Y
EMAIL FROM	User or Account from whom the email originates - default will be determined by the M5 Parameter values **FROM_EMAIL_NAME** and **CE_EMAIL_DOMAIN.** If this parameter is set to INTERFACE@ASSETWORKS.COM or left blank, the default option above will be used to construct the email address. If the parameter contains any other value, that entry will be used as the **EMAIL FROM** address.	N
DEFAULT LOCATION	Default M5 Location. Will be used if the incoming file contains a blank in the Location field. Must be a valid M5 location.	Y
DEFAULT VENDOR	Default M5 Vendor. Will be used if the incoming file contains a blank in the Vendor field. Must be a valid M5 Vendor.	Y

Parameter Name	Description	Required (Y/N)

METER OVERRIDE (Y/N/I/X)	This is the standard M5 Meter Override parameter.
	• Y – Meter warnings, except for rollovers, are ignored.
	  ▪ Rollover warnings are sent to the Reject Manager frame, no transactions are posted.
	  ▪ All other transactions with meter warnings will not be sent to the Reject Manager.
	• N – Meter warnings, including rollover warnings, will cause the transaction to be sent to the Reject Manager frame. No transactions are posted.
	• I – Transactions with meter warnings will not be rejected by the validation process. Meter journal, meters and usage will not be updated, transactions will process with Bad Meter set to 'Y'.
	• X – Meter readings from the input file are ignored completely. Transactions will post without entries in Meter Journal or updates to meters and usage.
		Y

USE FILE PRICE (Y/N)	If set to Y, the program will use the unit cost found on the file. If set to N, the program will use any prices or markups that are set up for the product in M5. Defaults to Y.	Y
DATE FORMAT (MM/DD/YYY or DD/MM/YYYY)	This parameter allows you to determine which of the two formats the incoming date will be in. If left blank, the default is MM/DD/YYY.	N

Sample Data

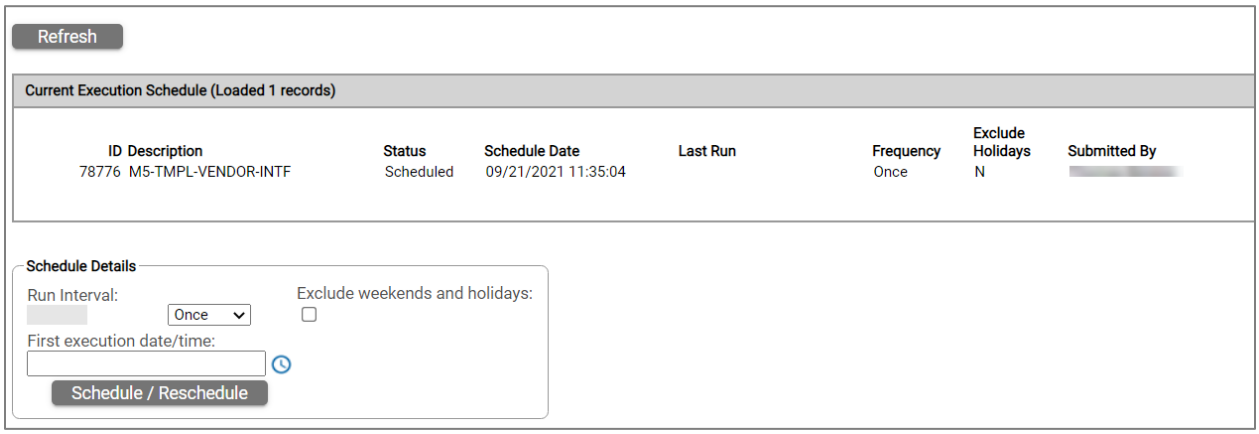
The following is a list of sample data that illustrates what the vendor data would look like within the .csv input file to be processed by the interface.

- The first example is just the M5 database field names. The next example shows what it would look like with sample data that corresponds to those fields.
- There is a File Data table at the end of this document that you can reference to see more information about these fields like position, header value, definition, tables/columns, data type/size, description, processing logic, and whether it is a required field.

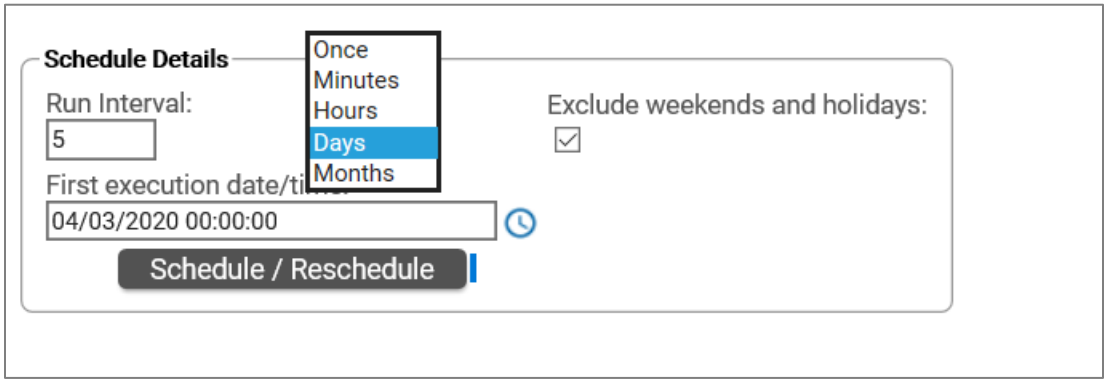
```
Unit Number, Transaction Date, Vendor, Location, Issue Qty, Fuel Type, Meter,
Unit Cost, User Data 1, User Data 2, User Data 3

JO5555,11/21/2017 13:30:55,JOTEST,FM,12.00,DS,190622,1.9838,USER DATA 1, USER
DATA 2,USER DATA 3
```

Current Execution Schedule

This i-frame displays the current execution schedule for this interface. Current and previously scheduled runs display the ID, Description, Status, Scheduled Date, Last Run Date, Frequency, Exclude Holidays, Submitted By and Run Desc fields.



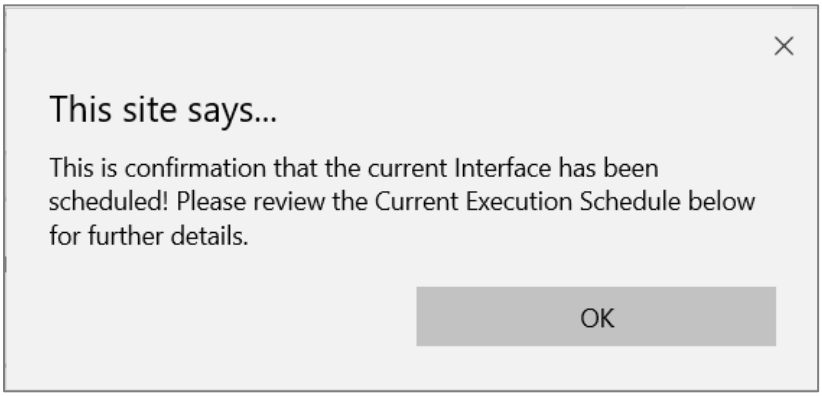
Schedule Details



To schedule the interface, enter schedule details.

1. Select the run interval (Once, Minutes, Hours, Days, Months).
    - If only running one time, currently, you can select **Once**, then select the **Schedule/Reschedule** button.
    - If you select Minutes, Hours, Days, or Months, enter a value for the interval in the **Run Interval** field that displays after selection is made.
2. If you would like to exclude weekends and holidays from the run, select the **Exclude Weekends and Holidays** checkbox.
3. Enter a **First Execution Date/Time** from which the run interval value should apply.
4. When finished, select the **Schedule/Reschedule** button.

You will receive the following message:



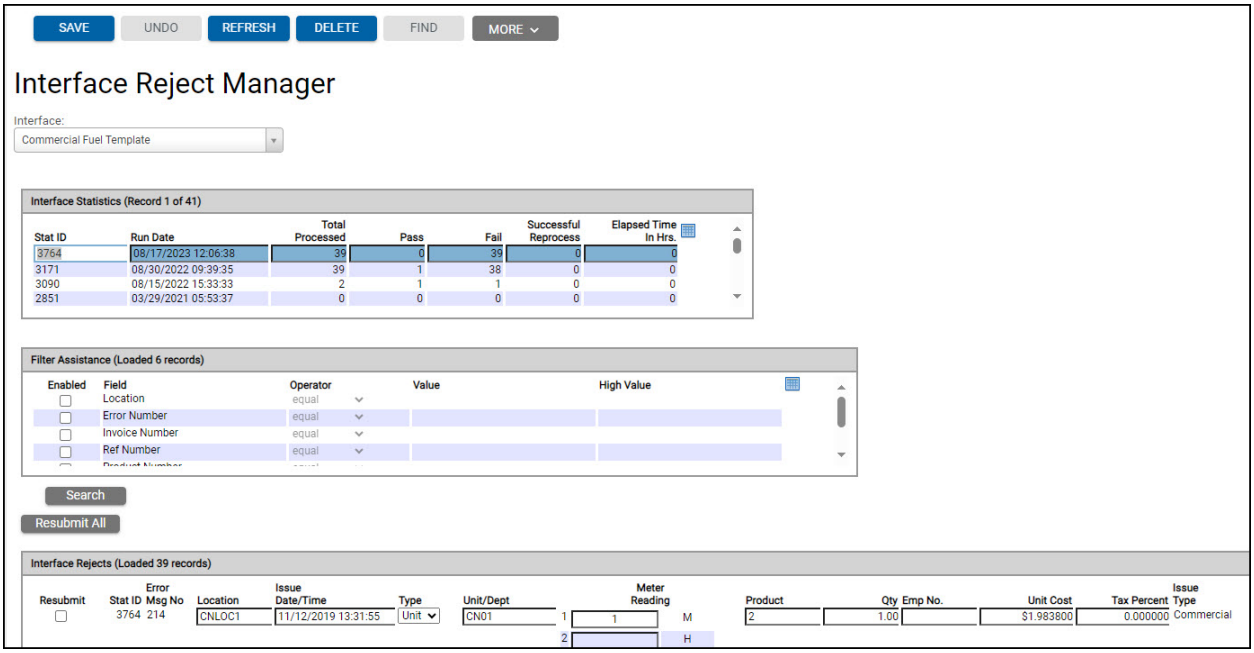
The scheduled run appears on the **Current Execution** i-frame. It can also be viewed on the **System Run List of Jobs** frame.

To view interface rejects, refer to the **Interface Reject Manager** frame.

Interface Reject Manager

To view rejects for the Commercial Fuel Template interface, navigate to the **Interface Reject Manager** frame.

To locate the interface, select from the dropdown list or enter the name.



After being selected, the **Interface Statistics** i-frame displays.

1. Select the **Stat ID** for the run you want to view and the **Interface Rejects** i-frame displays.

    - You can scroll to the bottom and select **Show All** in the last row to view all run statistics. However, there is a limit on how much data M5 can display at one time.

2. If an **Error Msg No.** is available, you can hover over it with your mouse to display the message.

3. After you have made the necessary corrections in M5, you can select the **Resubmit** checkbox for each record you want to resubmit.

4. You can delete any records you do not want to correct or resubmit.

5. Select **SAVE** to reprocess the rejected records.

Error Processing

If a transaction record fails to process the data transaction data (along with the error message) is passed to the common FleetFocus M5 interface reject infrastructure.

The common FleetFocus M5 interface reject infrastructure includes interface statistic information (how many records processed, how may records failed, how many records were reprocessed, or how long did the interface run) as well as rejected transactions for each interface execution cycle.

2. In-House Fuel Template

The In-House Fuel Template interface accepts inventory fuel transaction data into the FleetFocus M5 fueling system.

The interface performs the following functions:

- The interface reads and processes a text file of units and fuel charges and updates fuel costs and meter information in M5 for in-house or inventoried fuel.
- The system reads the data related to unit numbers, hose numbers, fuel dates, products and odometer readings and validate that data against M5 setup (Product Main, Product Setup Unit, Location Main Fueling Location).
- Upon validation, fuel charge information in M5 will be updated including fuel issue dates, quantities and cost, meters, meter dates, ltd (life to date) usage and meter journal entries.
- Rejected transactions are available for correction and reprocessing by using the Interface Reject Manager frame.

This interface is available to licensed clients only. Please contact AssetWorks Customer Support (1-610-225-8300, M5Support@Assetworks.com) or your project manager for more details on purchasing.

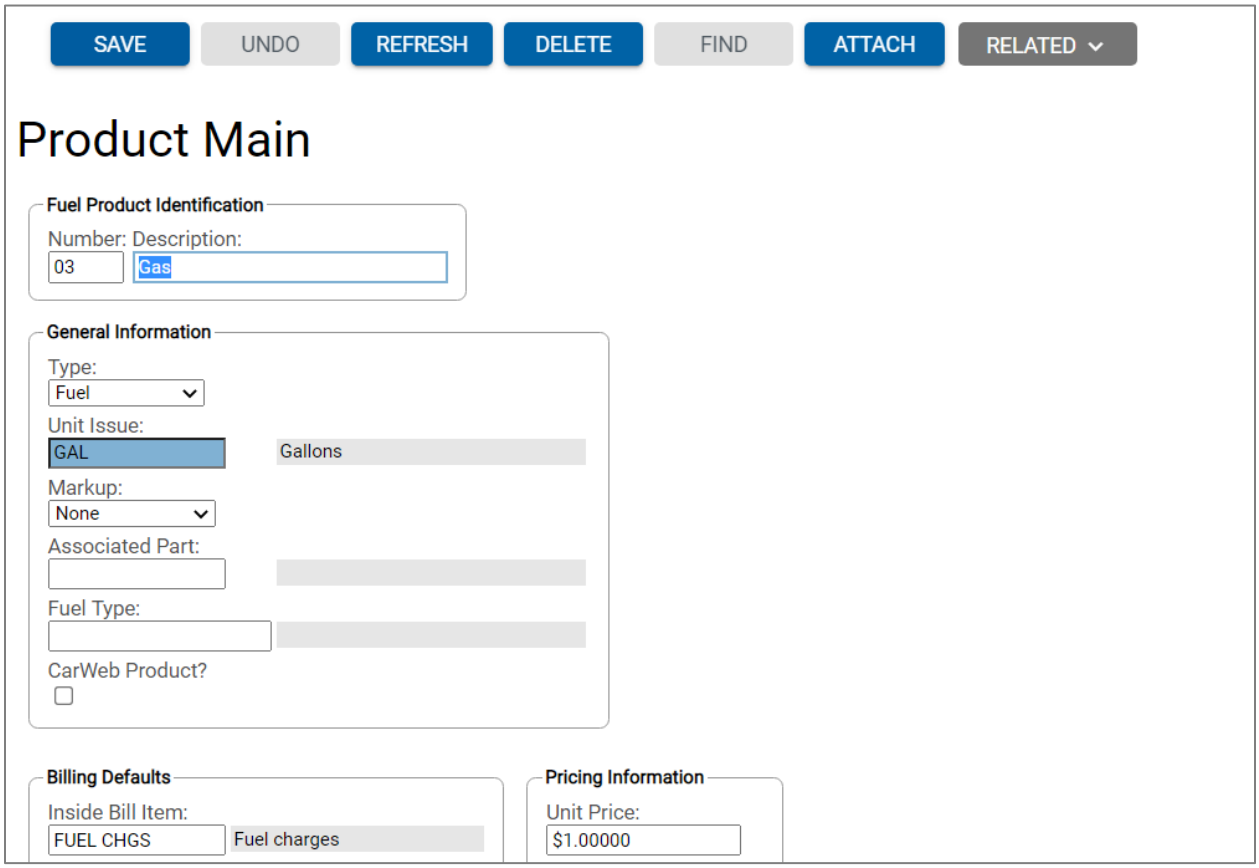
Setup and Configuration

Before using this interface, you will need to make sure M5 is properly configured to treat the fuel as an inventory product. This document assumes completion of the appropriate data set up for the following:

- Product Main
- Product Setup Unit
- Location Main Fueling Location

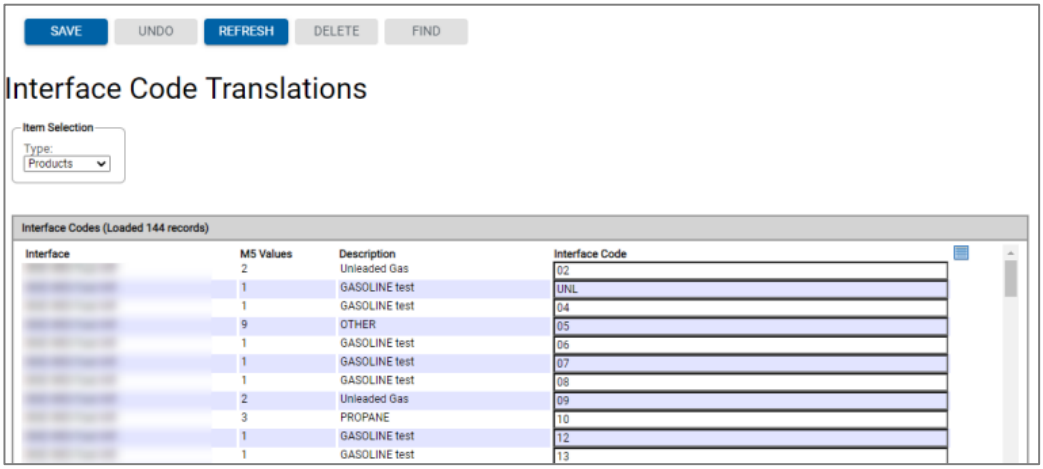
Product Main

All products must be set up on the Product Main frame.



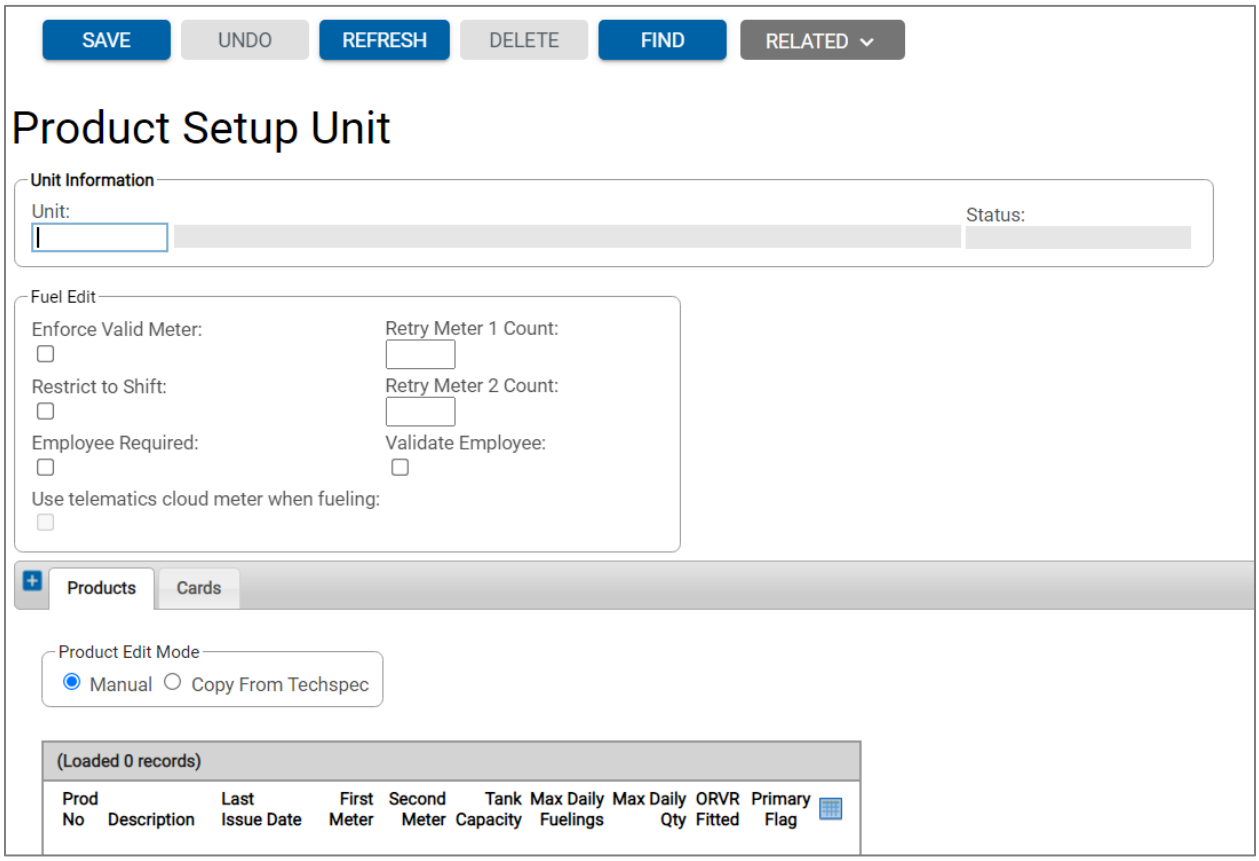
Product Translations

You can set up product translations by using the Interface Code Translations frame for those products in the interface file that do not match the products in M5.



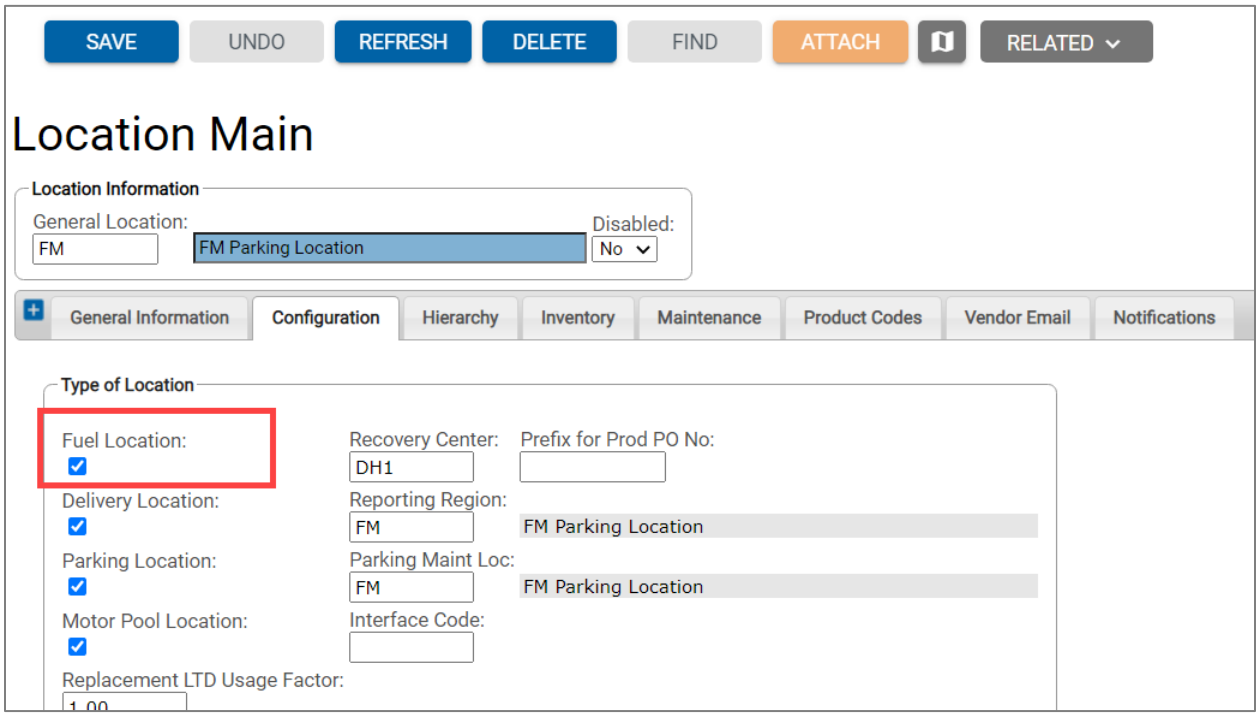
Product Setup Unit

You must set up tank capacity for each unit and each product on the Product Setup Unit frame.



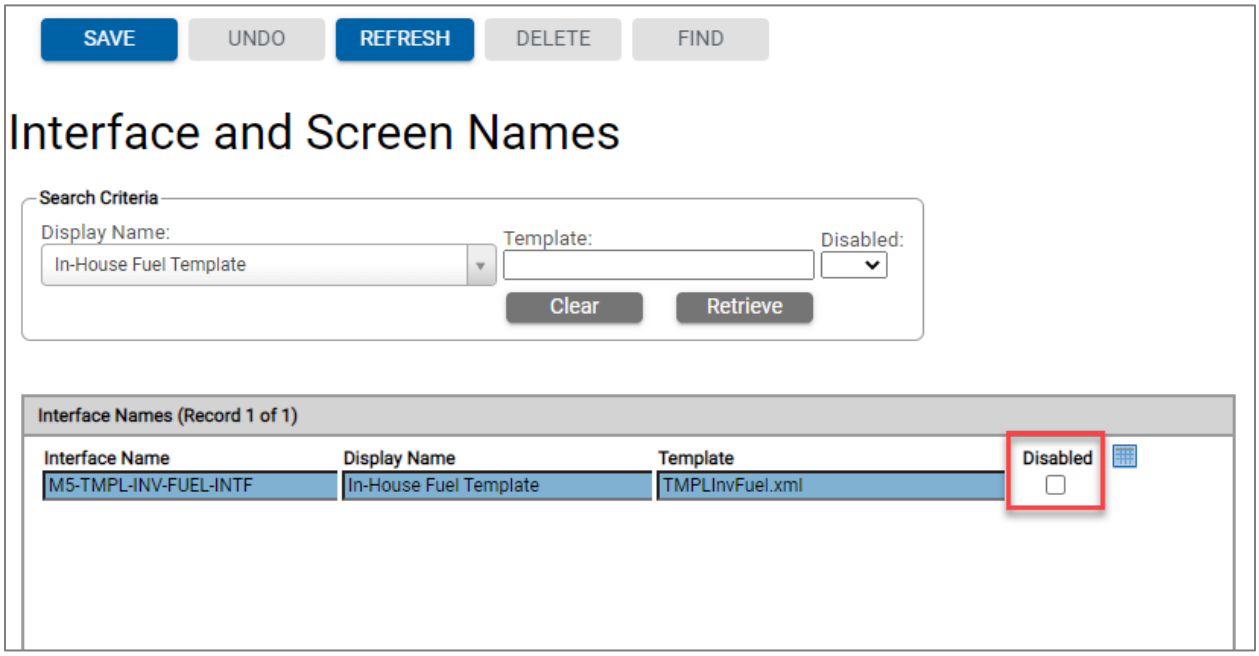
Location Main Fueling Location

You must have valid fueling locations set up on Location Main.



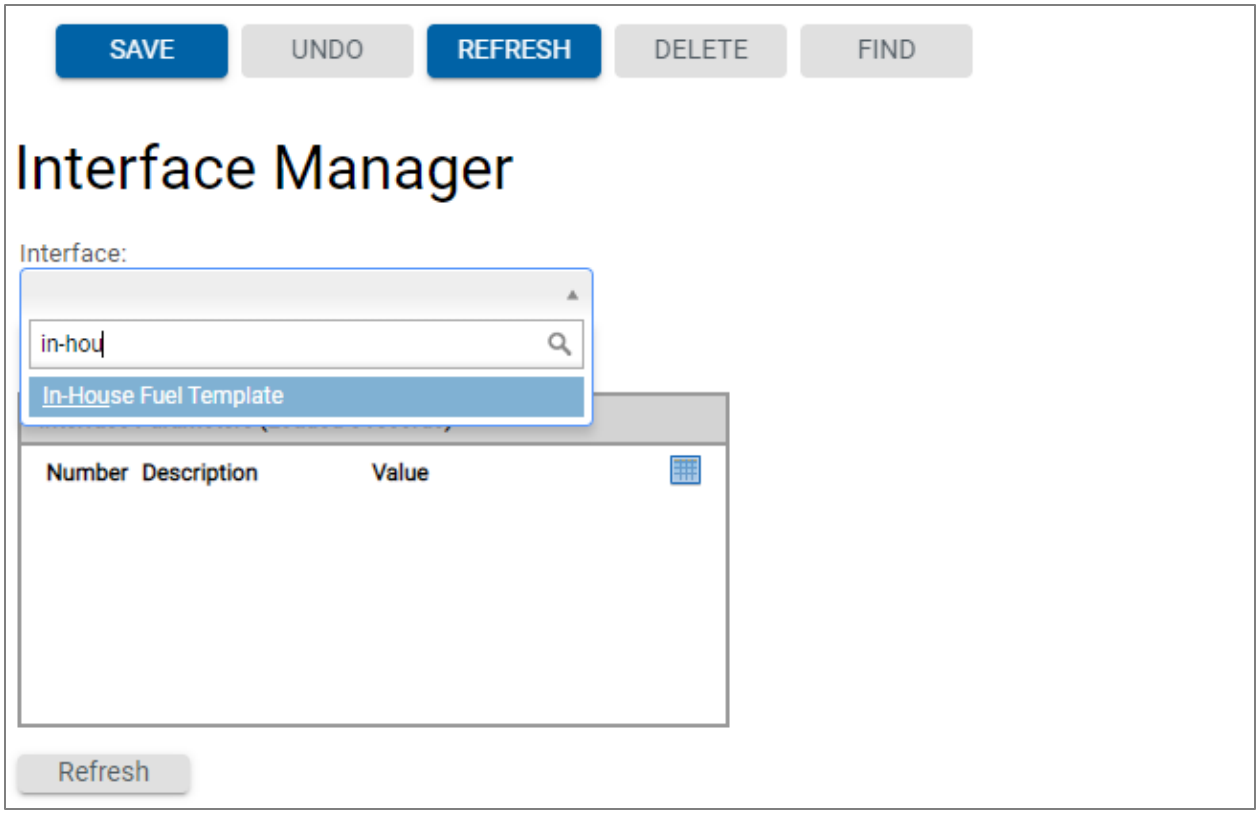
Interface and Screen Names

Before you can run the interface, make sure the interface is enabled for use.



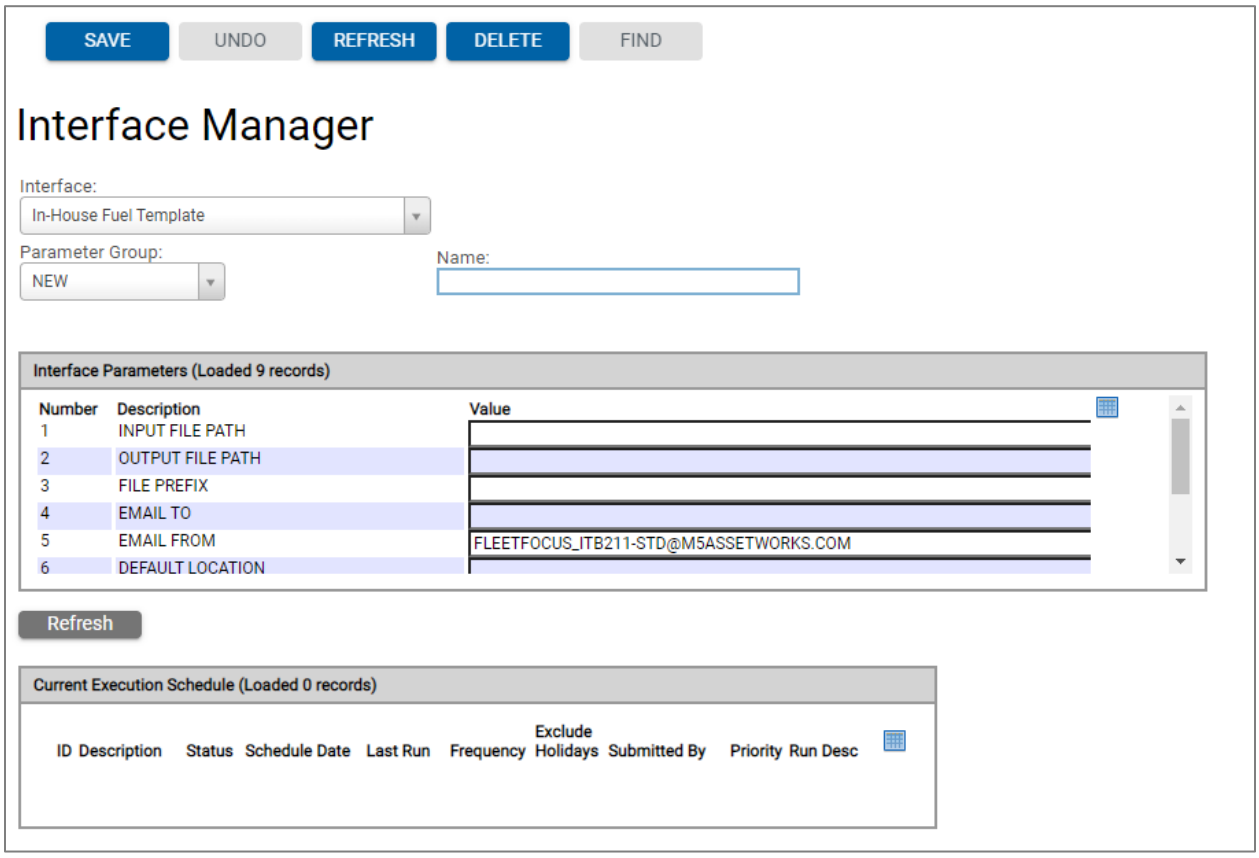
To verify:

1. Navigate to the **Interface and Screen Names** frame.
2. Scroll the list until you find: **M5-TMPL-INV-FUEL-INTF** on the list. Alternatively, you can search for the interface in the **Display Name** dropdown and select the **Retrieve** button.
3. Make sure the **Disabled** checkbox is cleared.
4. If it is selected and you want to run the interface, clear the checkbox and select **SAVE**.



- You can select an existing **Parameter Group** from the dropdown.
- If this is your first time using the interface, the only option will be NEW. You can use this option to create and save a new parameter group for future use.
- To create a new group, select NEW from the dropdown, enter a name in the **Name** field, define parameter values (explanations below), and select the **SAVE** button.
- You can also run the interface without saving your parameters.

Interface Parameters



Interface Parameter Explanations

Parameter Name	Description	Required (Y/N)
INPUT FILE PATH	File path where the input file will be found by the interface program. Note: This path refers to the C: drive on the batch server. The directory name should not end with a "\", and can either be a mapped drive (C:, Q:, etc.) or with a \\server name\share\directory format. The interface will process any files found in this directory with a .csv extension.	Y

Parameter Name	Description	Required (Y/N)
OUTPUT FILE PATH	File path where the file will be moved upon completion of the interface. Note: This path refers to the C: drive on the batch server. The directory name should not end with a "\", and can either be a mapped drive (C:, Q:, etc.) or with a \\server name\share\directory format. The file is renamed with the date and time. For example, a file named WODATA.csv will be renamed as WODATAyyyymmddhhmmss.csv where yyyymmdd represents year/month/day and hhmmss represents hour/minutes/seconds.	Y
FILE PREFIX	This is an optional parameter that allows you to specify a part of the file name that will be added to the beginning of each processed file as a prefix.	N
EMAIL TO	User or Account to whom any email updates will be sent upon about the interface run. If you need multiple emails to receive these notifications, it is recommended to create a distribution group on the mail server that consists of those email addresses. Completion emails will include a count of good and bad records. The email will also include a list of files processed by the interface run.	Y
EMAIL FROM	User/Account from whom the email originates - default will be determined by the M5 Parameter values **FROM_EMAIL_NAME** and **CE_EMAIL_DOMAIN.** If this parameter is set to INTERFACE@ASSETWORKS.COM or left blank, the default option above will be used to construct the email address. If the parameter contains any other value, that entry will be used as the EMAIL FROM address.	N
DEFAULT LOCATION	Default M5 location. The interface uses this value if the incoming file contains a blank in the Location field. Must be a valid M5 fueling location.	Y

Parameter Name	Description	Required (Y/N)

METER OVERRIDE (Y/N/I/X)	This is the standard M5 Meter Override parameter.
	• Y – Meter warnings, except for rollovers, are ignored.
	  ▪ Rollover warnings are sent to the Reject Manager frame, no transactions are posted.
	  ▪ All other transactions with meter warnings will not be sent to the Reject Manager.
	• N – Meter warnings, including rollover warnings, will cause the transaction to be sent to the Reject Manager frame. No transactions are posted.
	• I – Transactions with meter warnings will not be rejected by the validation process. Meter journal, meters and usage, will not be updated, transactions will process with Bad Meter set to 'Y'.
	• X – Meter readings from the input file are ignored completely. Transactions will post without entries in Meter Journal or updates to meters and usage.
		Y

DATE FORMAT (MM/DD/YYY or DD/MM/YYYY)	This parameter allows you to determine which of the two formats the incoming date will be in. If left blank, the default is MM/DD/YYY.	N
FILE TYPE (C,F,P,S,T,X)	Input file type (F = Fixed length, C = Comma delimited, V = Pipe (vertical bar), S = semicolon delimited, T = tab delimited, X = XML). C is the default value.	Y

Sample Data

The following is a list of sample data that illustrates what the fuel inventory data would look like within the various input file types the interface can process.

- There is a File Data table at the end of this document that you can reference to see more information about these fields like position, header value, definition, tables/columns, data type/size, description, processing logic, and whether it is a required field.

Comma:

```
JO5555,11/21/2017 13:30:55,1,1,FM,12.00,DS,190622,1.9838,USER DATA 1, USER
DATA 2,USER DATA 3
```

Fixed:

```
BELLUNIT2                      01/14/2021 21:30:551    1    FM
                                 5.00    UN
            190622   DATA & ONE     DATA 2 > TRUNCADATA 3 " TED TODATA4
    DATA5          DATA6
```

Pipe:

```
JODEPT|01/14/2022 21:30:55|1|1|JOLOC|5.00|JJ|190622|"DATA & ONE EXTRA LONG|
TEST TRUNC" DATA 2 > TRUNCATED TOO LONG|DATA " 3J
```

Semicolon:

```
JJDEPT;01/14/20AA 21:30:55;1;1;JJLOC;5.00;JJ;190622;"DATA & ONE EXTRA LONG;
TEST TRUNC" DATA 2 > TRUNCATED TOO LONG;DATA " 3J
```

Tab:

```
JJDEPT 01/14/20AA 21:30:55 1 1 JJLOC 5.00 JJ 190622 "DATA & ONE EXTRA LONG
TEST TRUNC" DATA 2 > TRUNCATED TOO LONG DATA " 3J
```

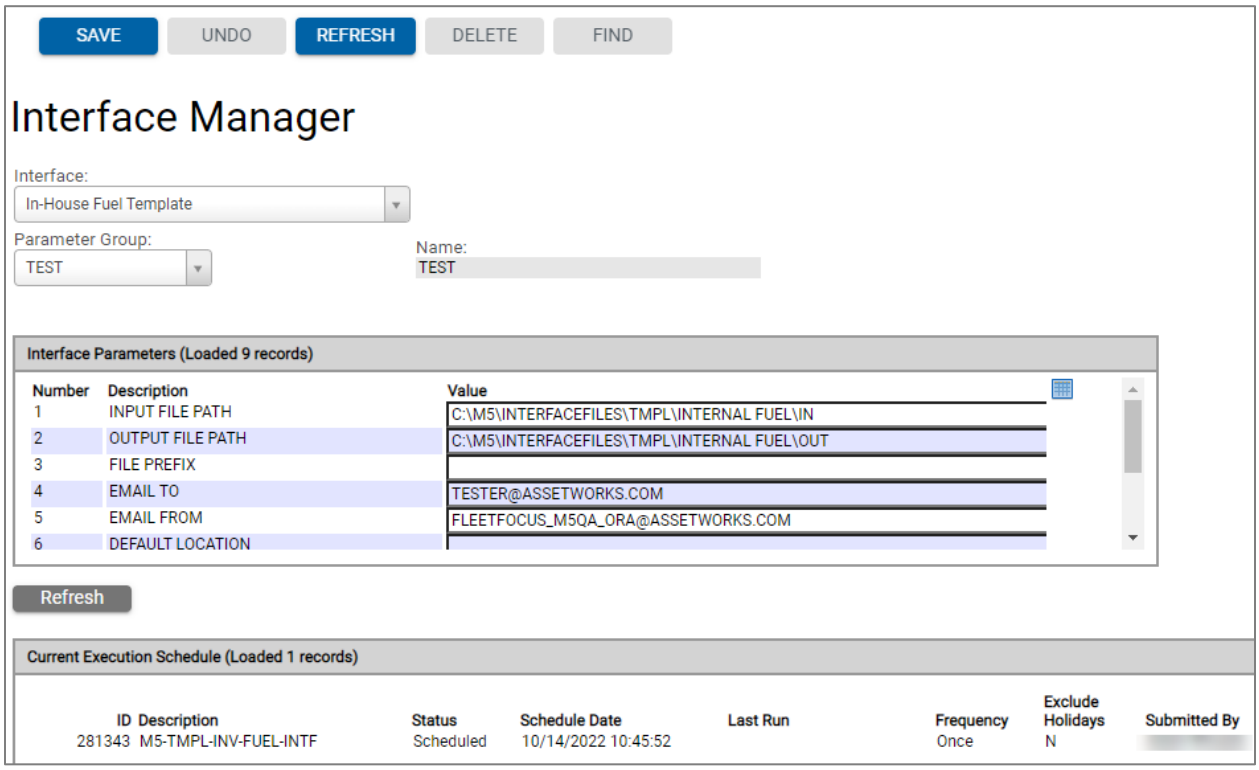
XML:

```
<?xml version='1.0' encoding='ISO-8859-1'
standalone='yes'?><IMPORT_DATA><INVFUELTRANS><INVENTORYFUEL><UNIT_NO>BELLUNIT
2</UNIT_NO><ISSUE_DATETIME>14/01/2022
21:30:55</ISSUE_DATETIME><HOSE_NO>3</HOSE_NO><TANK_NO>3</TANK_NO><LOCATION>FM
</LOCATION><ISSUE_QTY>5.00</ISSUE_QTY><PROD_NO>3</PROD_NO><METER>18000</METER
><USER_DATA_1>&amp;quot;DATA &amp;amp; ONE EXTRA LONG</USER_DATA_1><USER_DATA_2>TEST
TRUNC&amp;quot; DATA 2 &amp;gt; TRUNCATED TOO LONG</USER_DATA_2><USER_DATA_3>DATA
&amp;quot;
3J</USER_DATA_3><USER_DATA_4></USER_DATA_4><USER_DATA_5></USER_DATA_5><USER_D
ATA_6></USER_DATA_6></INVENTORYFUEL></INVFUELTRANS></IMPORT_DATA>
```

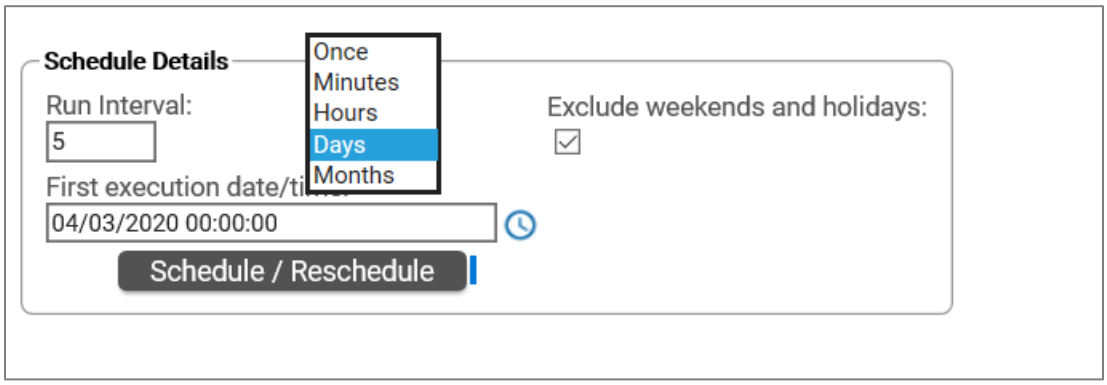
Each client who wishes to purchase the use of this interface will be provided with a ShareFile containing the set up script, and such that is required for running the interface. In addition, the client must request a new M5 Activation Key to be able to access and run this interface.

Current Execution Schedule

This i-frame displays the current execution schedule for this interface. Current and previously scheduled runs display the ID, Description, Status, Scheduled Date, Last Run Date, Frequency, Exclude Holidays, Submitted By and Run Desc fields.



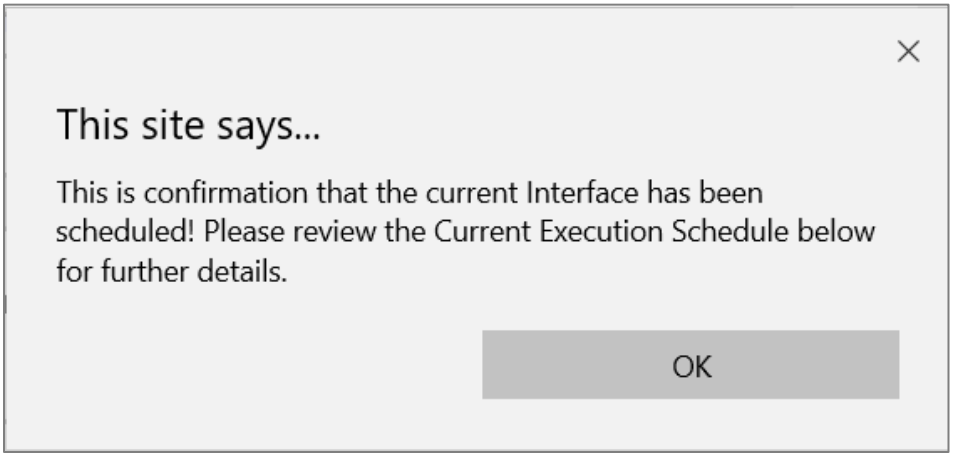
Schedule Details



To schedule the interface, enter schedule details.

1. Select the run interval (Once, Minutes, Hours, Days, Months).
    - If only running one time, currently, you can select **Once**, then select the **Schedule/Reschedule** button.
    - If you select Minutes, Hours, Days, or Months, enter a value for the interval in the **Run Interval** field that displays after the selection is made.
2. If you would like to exclude weekends and holidays from the run, select the **Exclude Weekends and Holidays** checkbox.
3. Enter a **First Execution Date/Time** from which the run interval value should apply.
4. When finished, select the **Schedule/Reschedule** button.

You will receive the following message:



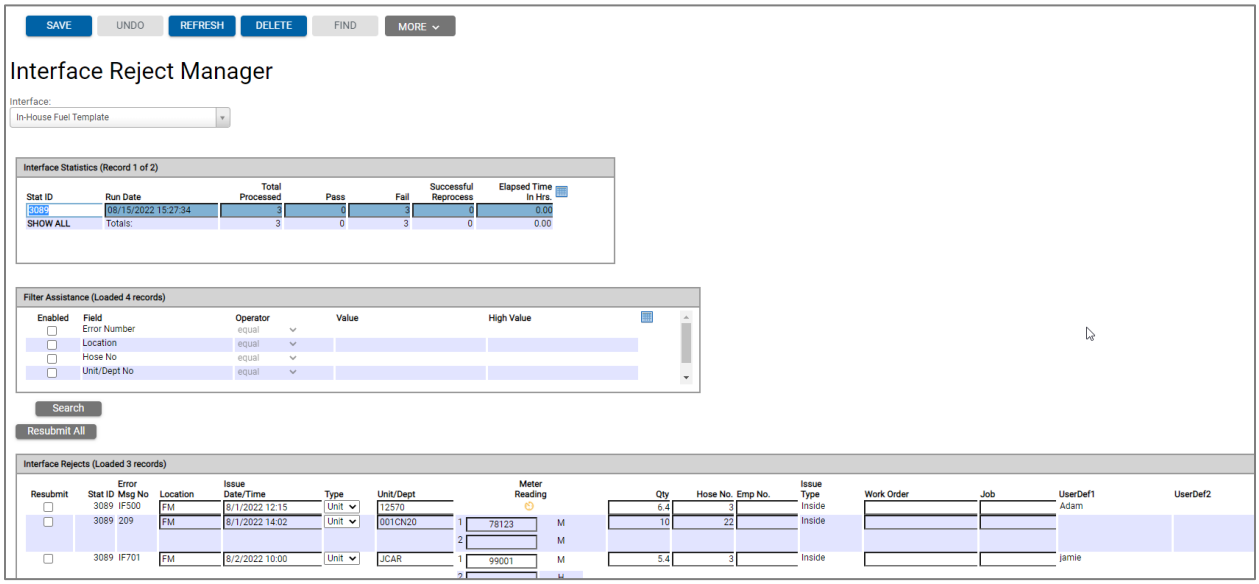
The scheduled run appears on the **Current Execution** i-frame. It can also be viewed on the **System Run List of Jobs** frame.

To view interface rejects, refer to the **Interface Reject Manager** frame.

Interface Reject Manager

To view rejects for the In-House Fuel Template interface, navigate to the **Interface Reject Manager** frame.

To locate the interface, select from the dropdown list or enter the name.



After selected, the **Interface Statistics** i-frame displays.

1. Select the **Stat ID** for the run you want to view, the **Interface Rejects** i-frame displays.
    - You can scroll to the bottom and select **Show All** in the last row to view all run statistics together. However, there is a limit on how much data M5 can display at one time.
    - **Filter Assistance** is also available to further refine your results.
2. If an **Error Msg No.** is available, you can hover over it with your mouse to display the message.
3. After you have made the necessary corrections in M5, you can select the **Resubmit** checkbox for each record you want to resubmit.
4. You can also delete any records you do not want to correct or resubmit.
5. Select **SAVE** to reprocess the rejected records.

Error Processing

If a transaction record fails to process the data transaction data (along with the error message) will be passed to the common FleetFocus M5 interface reject infrastructure.

The common FleetFocus M5 interface reject infrastructure includes interface statistic information (how many records processed, how may records failed, how many records were reprocessed, or how long did the interface run) as well as rejected transactions for each interface execution cycle.

3. Part Purchase Order Export

The Part Purchase Order Export Interface generates and exports a comma delimited list of part purchase orders. This functionality saves organizations the work of manually processing a large amount of data.

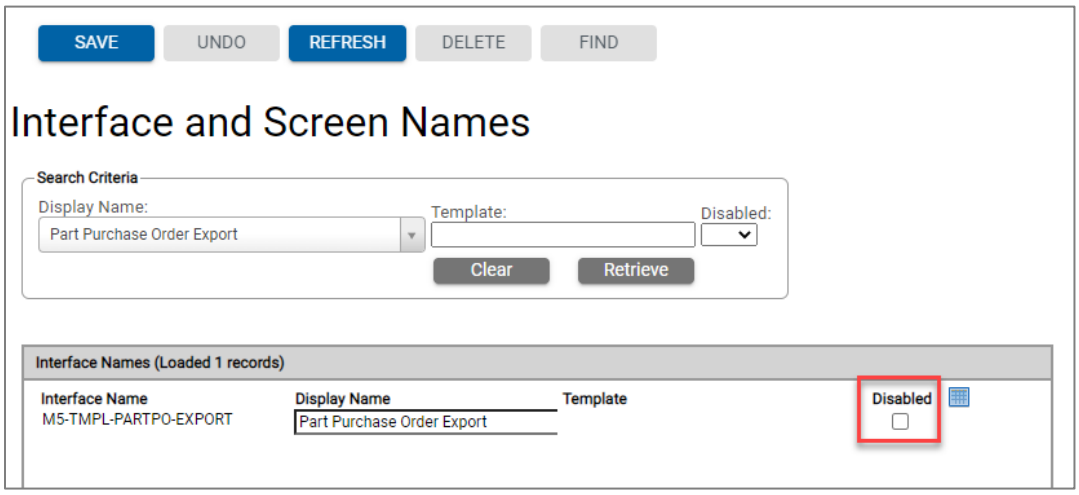
The interface performs the following functions:

- Selects all Part Order lines where the sent_dt is null and status is ORDERED and creates a comma delimited data file containing all detail information.
- After sent, the sent_dt on PART_ORDERS will be set to that the data is not sent again.

This interface is available to licensed clients only. Please contact AssetWorks Customer Support (1-610-225-8300, M5Support@Assetworks.com) or your project manager for more details on purchasing.

Interface and Screen Names

Before you can run the interface, make sure the interface is enabled for use.



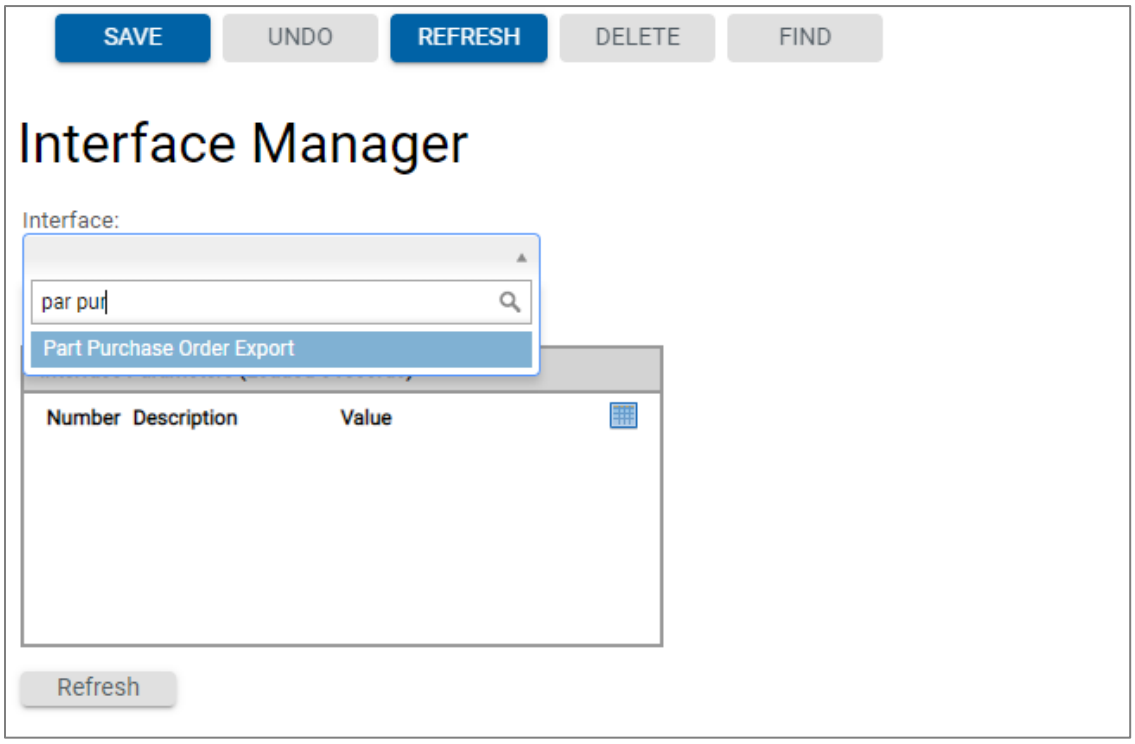
To verify:

1. Navigate to the **Interface and Screen Names** frame.
2. Scroll the list until you find: **M5-TMPL-PARTPO-EXPORT** on the list. Alternatively, you can search for the interface in the **Display Name** dropdown and select the **Retrieve** button.
3. Make sure the **Disabled** checkbox is cleared.
4. If it is selected and you want to run the interface, clear the checkbox and select **SAVE**.

Interface Manager

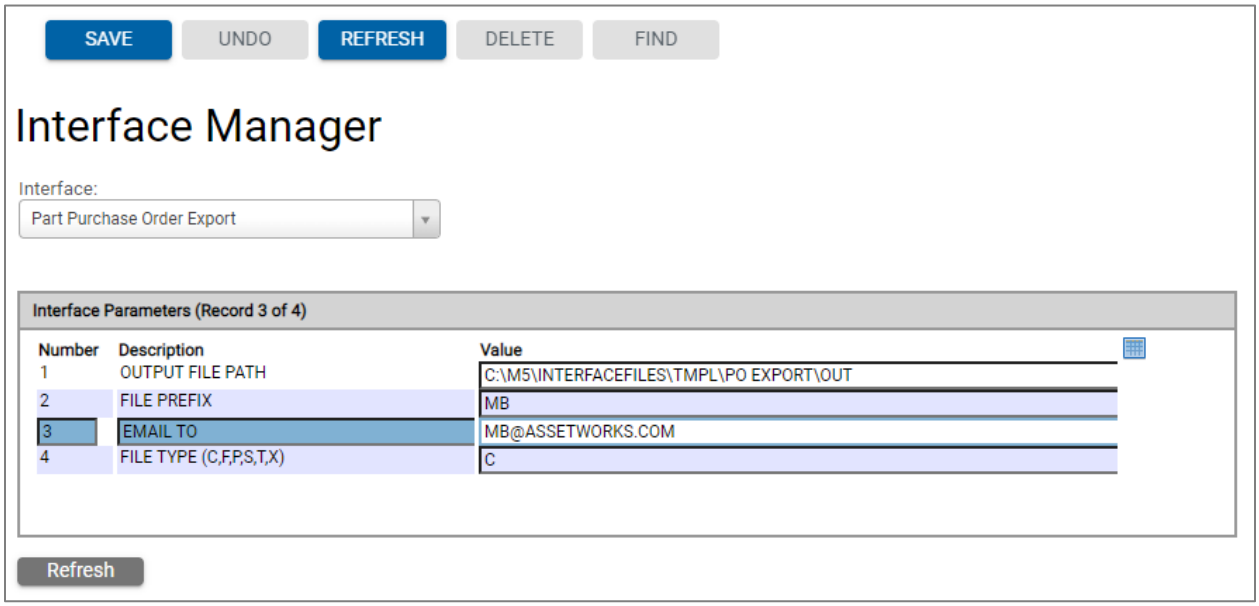
After verifying that the interface is enabled for use, navigate to the **Interface Manager** frame. To locate the interface, select from the dropdown list or enter the name.

After you select the interface from the dropdown, Interface Parameters, Current Execution Schedule, and Schedule Details display.



- You can select an existing **Parameter Group** from the dropdown.
- If this is your first time using the interface, the only option will be NEW. You can use this option to create and save a new parameter group for future use.
- To create a new group, select NEW from the dropdown, enter a name in the **Name** field, define parameter values (explanations below), and select the **SAVE** button.
- You can run the interface without saving your parameters.

Interface Parameters



Interface Parameter Explanations

Parameter Name	Description	Required (Y/N)
OUTPUT FILE PATH	File path where the file will be moved upon completion of the interface. Note: This path refers to the C: drive on the batch server. The directory name should not end with a "\", and can either be a mapped drive (C:, Q:, etc.) or with a \\server name\share\directory format. The file is renamed with the date and time. For example, a file named WODATA.csv will be renamed as WODATAyyyymmddhhmmss.csv where yyyymmdd represents year/month/day and hhmmss represents hour/minutes/seconds.	Y
FILE PREFIX	This is an optional parameter that allows you to specify a part of the file name that will be added to the beginning of each processed file as a prefix.	N

Parameter Name	Description	Required (Y/N)
EMAIL TO	User/Account to whom any email updates will be sent upon about the interface run. If you need multiple emails to receive these notifications, it is recommended to create a distribution group on the mail server that consists of those email addresses. Completion emails will include a count of good and bad records. The email will also include a list of files processed by the interface run.	Y

Sample Data

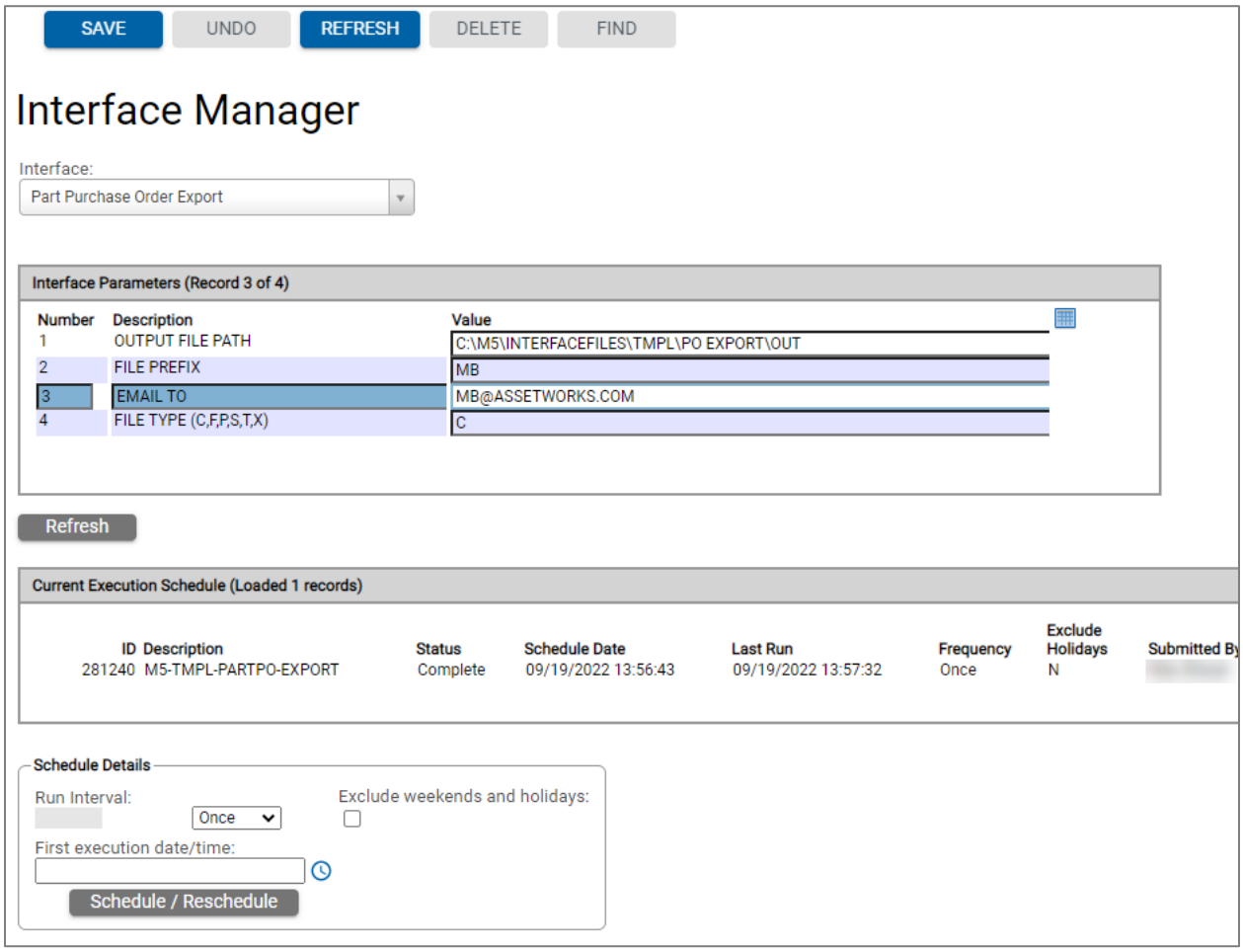
The following is a list of sample data that illustrates what the vendor data would look like within the .csv input file to be processed by the interface.

- There is a File Data table at the end of this document that you can reference to see more information about these fields like position, header value, definition, tables/columns, data type/size, description, processing logic, and whether it is a required field.

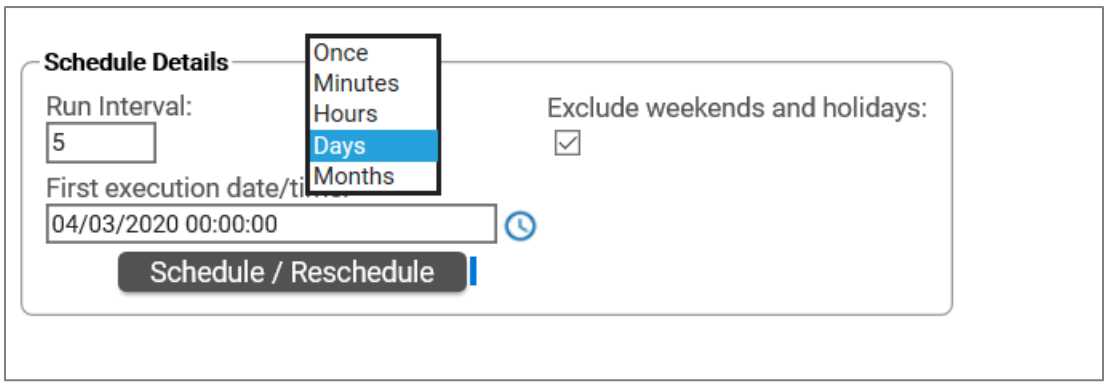
```
"000000000023387","NORMM","U0005138","","NAPA",ORDERED,01/21/2016
15:06:26,11,"100002","","NORMM",2,2.12,0,"EA",4.24,11/22/2013
17:31:29,"WO","01-01","",""
```

Current Execution Schedule

The **Current Execution Schedule** i-frame displays the current execution schedule for this interface. Current and previously scheduled runs display the ID, Description, Status, Scheduled Date, Last Run Date, Frequency, Exclude Holidays, Submitted By and Run Desc fields.



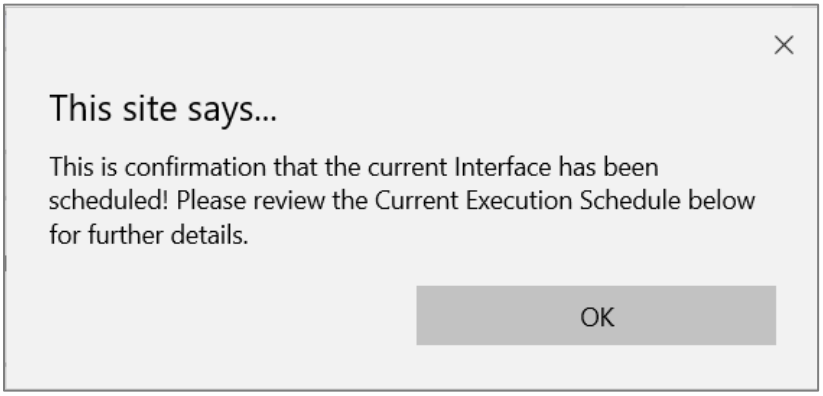
Schedule Details



To schedule the interface, enter schedule details.

1. Select the run interval (Once, Minutes, Hours, Days, Months).
    - If only running one time, currently, you can select **Once**, then select the **Schedule/Reschedule** button.
    - If you select Minutes, Hours, Days, or Months, enter a value for the interval in the **Run Interval** field that displays after selection is made.
2. If you would like to exclude weekends and holidays from the run, select the **Exclude Weekends and Holidays** checkbox.
3. Enter a **First Execution Date/Time** from which the run interval value should apply.
4. When finished, select the **Schedule/Reschedule** button.

You will receive the following message:



The scheduled run appears on the **Current Execution** i-frame. It can also be viewed on the **System Run List of Jobs** frame.

Error Processing

Because this interface only generates an outbound file, there is no error processing. The Interface Reject Manager frame is not used with this interface.

4. Part PO Receipt Template

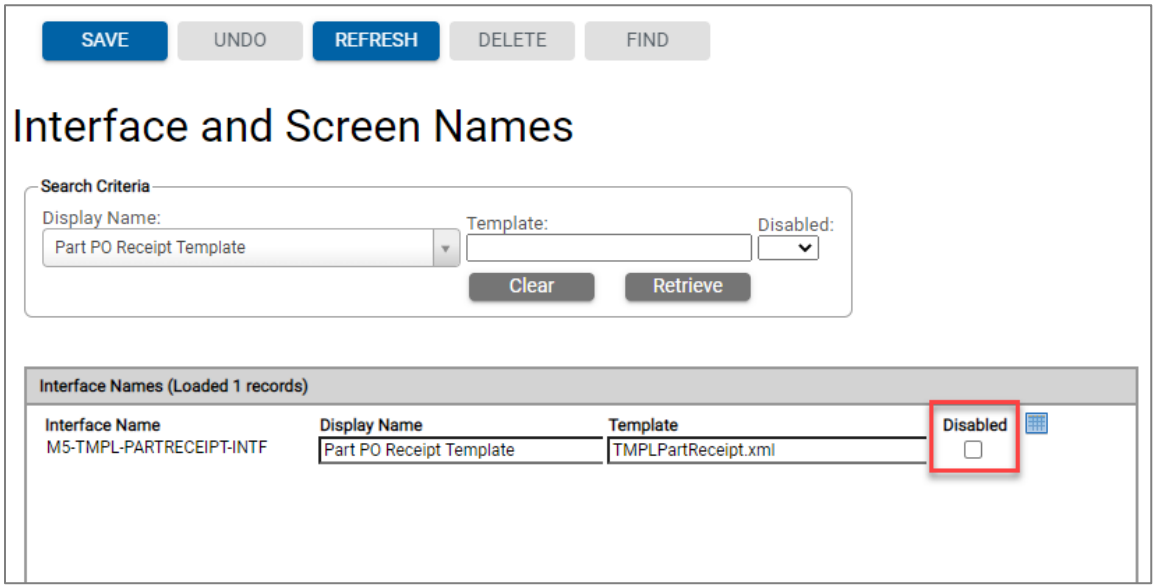
The *Part PO Receipt Template* interface accepts part receipts into M5 and creates a part_jnl RECEIVE record. The interface also updates inventory if the part is reserved to stock or issues the part if it is a non-stock or stock part reserved to a specific asset.

⚠ The interface is for receiving M5 purchase orders for parts only. The interface will not process serialized or lotted part receipts. You must process these types of transactions in the M5 Application.

This interface is available to licensed clients only. Please contact AssetWorks Customer Support (1-610-225-8300, M5Support@Assetworks.com) or your project manager for more details on purchasing.

Interface and Screen Names

Before you can run the interface, you must make sure the interface is enabled for use.



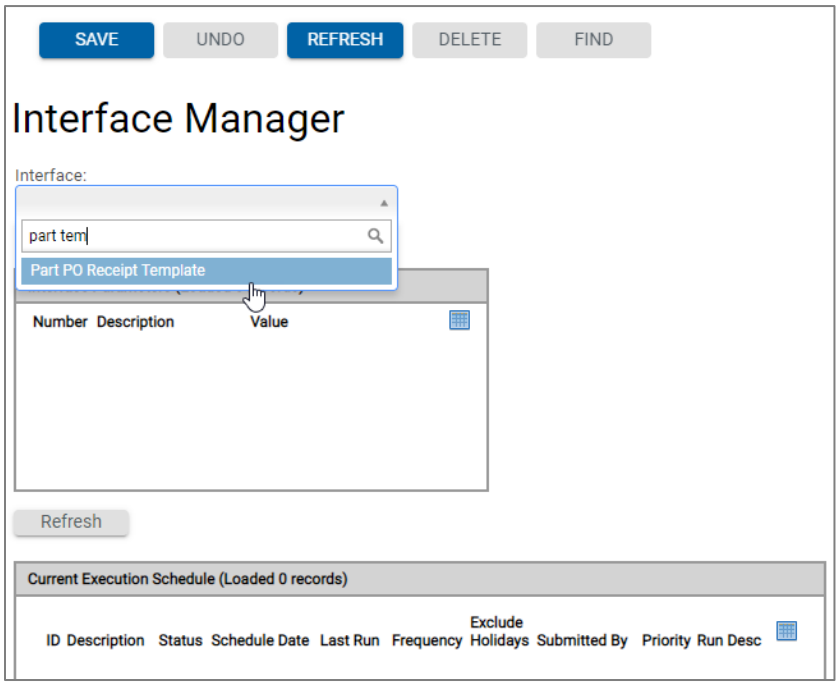
To verify:

1. Navigate to the **Interface and Screen Names** frame.
2. Scroll the list until you find **M5-TMPL-PARTRECEIPT-INTF** on the list. Alternatively, you can search for the interface in the **Display Name** dropdown and select the **Retrieve** button.
3. Make sure the **Disabled** checkbox is cleared.
4. If it is selected and you want to run the interface, clear the checkbox and select **SAVE**.

Interface Manager

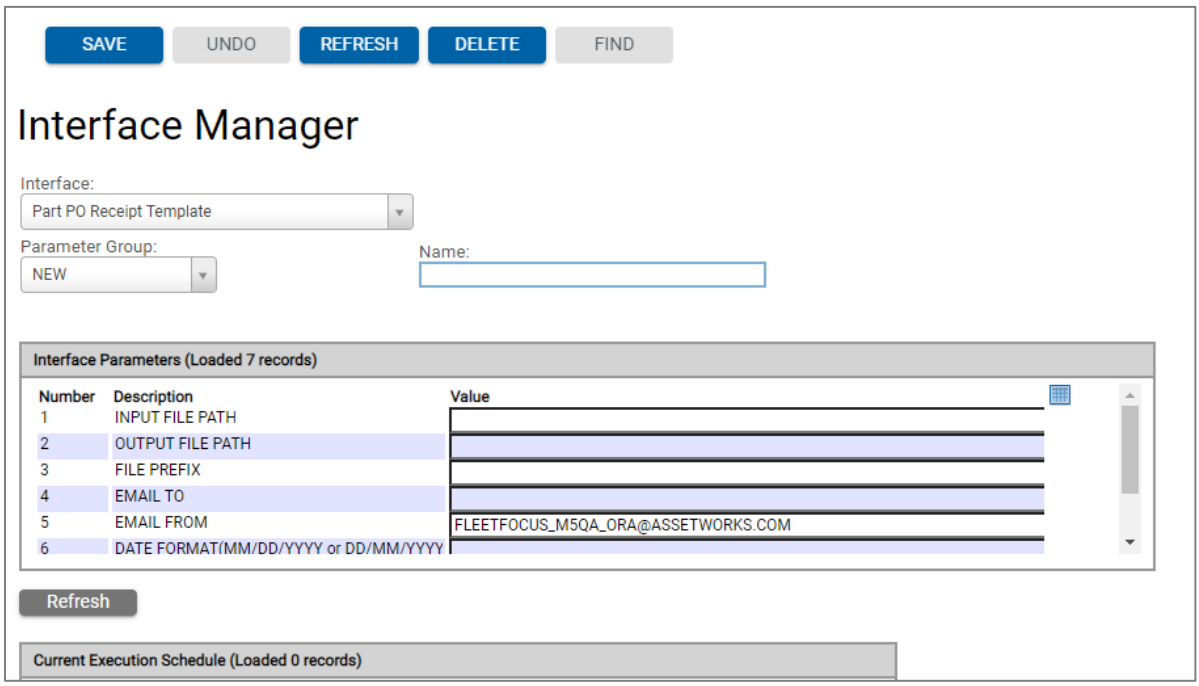
After verifying that the interface is enabled for use, navigate to the **Interface Manager** frame. To locate the interface, select from the dropdown list or enter the name.

After you select the interface from the dropdown, Interface Parameters, Current Execution Schedule, and Schedule Details display.



- You can select an existing **Parameter Group** from the dropdown.
- If this is your first time using the interface, the only option will be **NEW**. You can use this option to create and save a new parameter group for future use.
- To create a new group, select **NEW** from the dropdown, enter a name in the **Name** field, define parameter values (explanations below), and select the **SAVE** button.
- You can also run the interface without saving your parameters.

Interface Parameters



Interface Parameter Explanations

Parameter Name	Description	Required (Y/N)
INPUT FILE PATH	File path where the input file will be found by the interface program. Note: This path refers to the C: drive on the batch server. The directory name should not end with a "\", and can either be a mapped drive (C:, Q:, etc.) or with a \\server name\share\directory format. The interface will process any files found in this directory with a .csv extension.	Y
OUTPUT FILE PATH	File path where the file will be moved upon completion of the interface. Note: This path refers to the C: drive on the batch server. The directory name should not end with a "\", and can either be a mapped drive (C:, Q:, etc.) or with a \\server name\share\directory format. The file is renamed with the date and time. For example, a file named WODATA.csv will be renamed as WODATAyyyymmddhhmmss.csv where yyyymmdd represents year/month/day and hhmmss represents hour/minutes/seconds.	Y

Parameter Name	Description	Required (Y/N)
FILE PREFIX	This is an optional parameter that allows you to specify a part of the file name that will be added to the beginning of each processed file as a prefix.	N
EMAIL TO	User/Account to whom any email updates will be sent upon about the interface run. If you need multiple emails to receive these notifications, it is recommended to create a distribution group on the mail server that consists of those email addresses. Completion emails will include a count of good and bad records. The email will also include a list of files processed by the interface run.	Y
EMAIL FROM	User/Account from whom the email originates - default will be determined by the M5 Parameter values **FROM_EMAIL_NAME** and **CE_EMAIL_DOMAIN.** If this parameter is set to INTERFACE@ASSETWORKS.COM or left blank, the default option above will be used to construct the email address. If the parameter contains any other value, that entry will be used as the EMAIL FROM address.	N
DATE FORMAT (MM/DD/YYY or DD/MM/YYYY)	This parameter allows you to determine which of the two formats the incoming date will be in. If left blank, the default is MM/DD/YYY.	N
FILE TYPE (C,F,P,S,T,X)	Input file type (F = Fixed length, C = Comma delimited, V = Pipe (vertical bar), S = semicolon delimited, T = tab delimited, X = XML). C is the default value.	Y

Sample Data

The following is a list of sample data that illustrates what the data would look like within the various file format input files to be processed by the interface.

- There is a File Data table at the end of this document that you can reference to see more information about these fields like position, header value, definition, tables/columns, data type/size, description, processing logic, and whether it is a required field.

Comma Delimited

```
FM,JOTEST,000000000031861,JOTEST,INV-TEST,03/11/2022 10:30:00,03/11/2022
10:35:00,,26,1,XXX3X,EACH,1,1.20,Y,300.00,ST,,,,FAIL,LF
FM,JOTEST,000000000031861,JOTEST,INV-TEST,03/11/2022 10:30:00,03/11/2022
10:35:00,,26,1,XXX3X,EACH,1,1.20,Y,-1.00,ST,,,,FAIL,LF
FM,JOTEST,000000000031861,JOTEST,INV-TEST-ISSUE,03/11/2022
10:30:00,03/11/2022
10:35:00,,27,5,1157,EACH,1,1.20,Y,1.00,WO,9000009860,Y,01-04,FAIL,LF
```

Fixed Format

```
FM    JOTEST      000000000031861JOTEST     INV-TEST       03/11/2022
10:30:0003/11/2022 10:35:00           23.00         41157
EACH                1  1.20Y300.00UNJO5555
FAIL  LF
```

Pipe

```
XX|JOTEST|000000000031861|JOTEST|INV-31590|03/11/2022 10:30:00|03/11/2022
10:35:00||1|3|4444|EACH|2|1.20|N||||||FAIL|
FM|JOTEST|000000000031861|JOTEST|INV-TEST-ISSUE|03/11/2022
10:30:00|03/11/2022
10:35:00||27|5|1157|EACH|1|1.20|Y|1.00|WO|9000009860|Y|01-04|FAIL|LF
```

TAB

```
FM JOTEST 000000000031861 JOTEST INV-TEST-ISSUE 03/11/2022 10:30:00
03/11/2022 10:35:00 27 5 1157 EACH 1 1.20 Y 1.00 WO 9000009860 Y 01-04 FAIL
LF
```

Semicolon

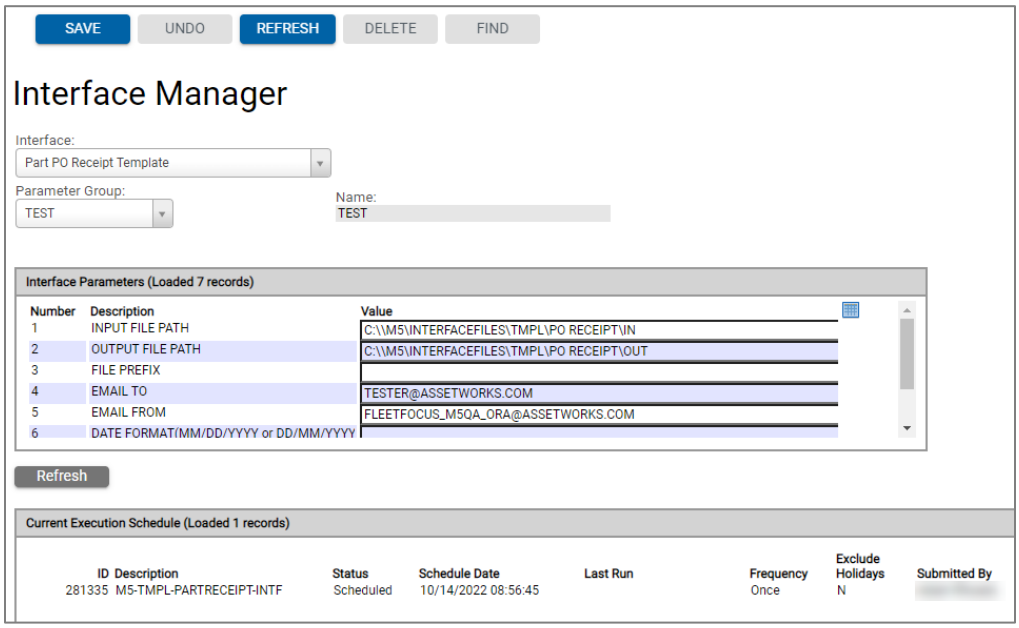
```
XX;JOTEST;000000000031861;JOTEST;INV-31590;03/11/2022 10:30:00;03/11/2022
10:35:00;;1;3;4444;EACH;2;1.20;N;;;;;;FAIL;
FM;JOTEST;000000000031861;JOTEST;INV-TEST-ISSUE;03/11/2022
10:30:00;03/11/2022
10:35:00;;27;5;1157;EACH;1;1.20;Y;1.00;WO;9000009860;Y;01-04;FAIL;LF
```

XML

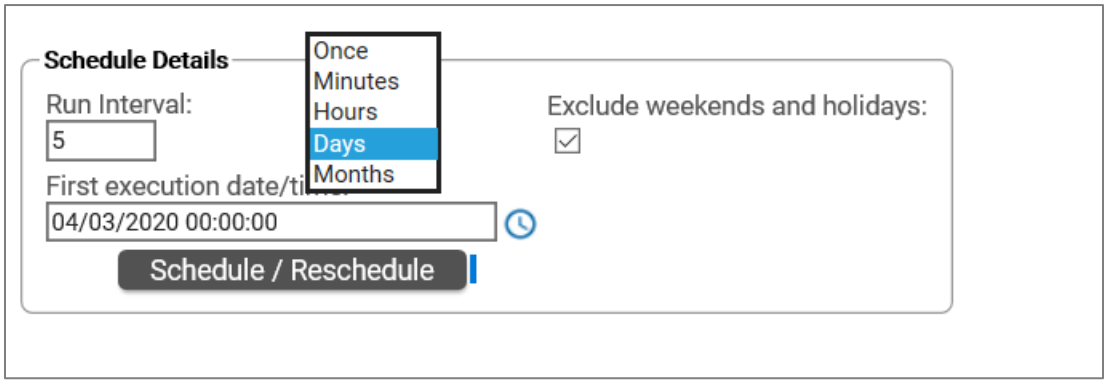
```
<?xml version='1.0' encoding='ISO-8859-1'
standalone='yes'?><IMPORT_DATA><PARTRECEIPTS><PARTRECEIPT><LOCATION>FM</LOCAT
ION><VENDOR_NO>JOTEST</VENDOR_NO><PO_NO>000000000031861</PO_NO><EMP_NO>JOTEST
</EMP_NO><INV_NO>INV-TEST</INV_NO><VEND_INV_DT>03/11/2022
10:30:00</VEND_INV_DT><TRANS_DT>03/11/2022
10:35:00</TRANS_DT><TAX_SCHEME></TAX_SCHEME><DISCOUNT_PC>23.00</DISCOUNT_PC><
PO_LINE>4</PO_LINE><PART_NO>1157</PART_NO><UNIT_INVENTORY>EACH</UNIT_INVENTOR
Y><RCVD_QTY>1</RCVD_QTY><UNIT_DO>1.20</UNIT_DO><CORE_FL>Y</CORE_FL><CORE_DO>3
00.00</CORE_DO><TYPE_CODE>UN</TYPE_CODE><TYPE_NUM>JO5555</TYPE_NUM><ISSUE_PAR
T></ISSUE_PART><JOB_CODE></JOB_CODE><FAILURE_CODE>FAIL</FAILURE_CODE><POSITIO
N_CODE>LF</POSITION_CODE></PARTRECEIPT></PARTRECEIPTS></IMPORT_DATA>
```

Current Execution Schedule

This i-frame displays the current execution schedule for this interface. Current and previously scheduled runs display the ID, Description, Status, Scheduled Date, Last Run Date, Frequency, Exclude Holidays, Submitted By and Run Desc fields.



Schedule Details

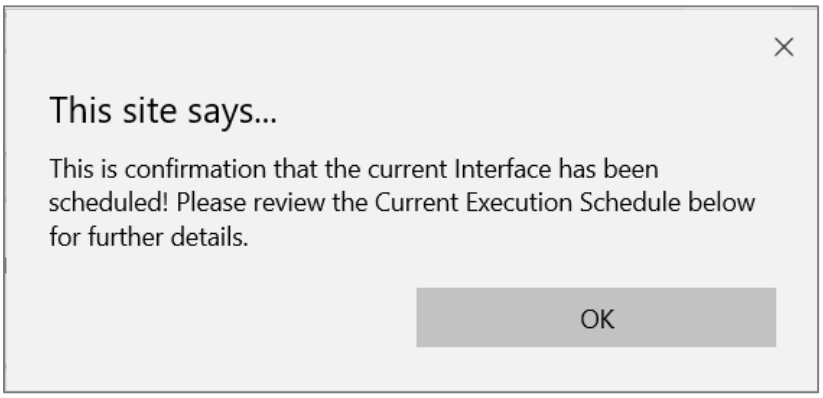


To schedule the interface, enter schedule details.

1. Select the run interval (Once, Minutes, Hours, Days, Months).
    - If only running one time, currently, you can select **Once**, then select the **Schedule/Reschedule** button.
    - If you select Minutes, Hours, Days, or Months, enter a value for the interval in the **Run Interval** field that displays after selection is made.

6. If you would like to exclude weekends and holidays from the run, select the **Exclude Weekends and Holidays** checkbox.
7. Enter a **First Execution Date/Time** from which the run interval value should apply.
8. When finished, select the **Schedule/Reschedule** button.

You will receive the following message:



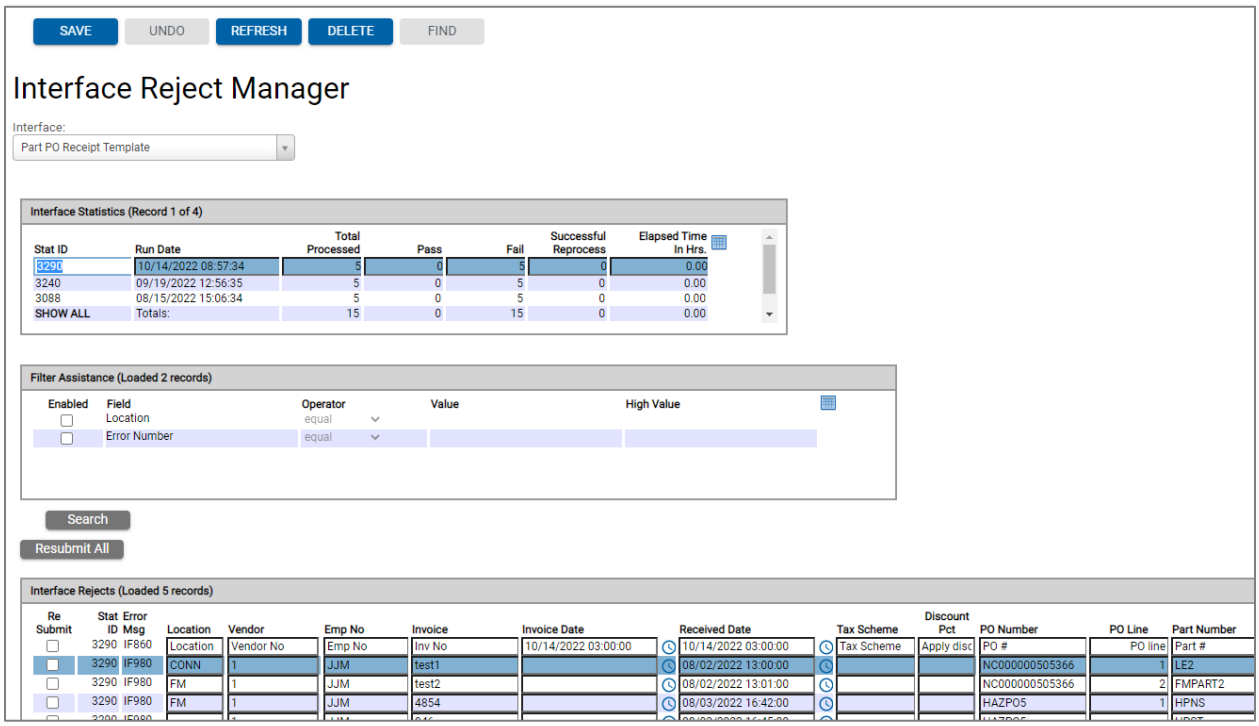
The scheduled run appears on the **Current Execution** i-frame. It can also be viewed on the **System Run List of Jobs** frame.

To view interface rejects, refer to the **Interface Reject Manager** frame.

Interface Reject Manager

To view rejects for the Part PO Receipt Template interface, navigate to the **Interface Reject Manager** frame.

To locate the interface, select from the dropdown list or enter the name.



After selected, the **Interface Statistics** i-frame displays.

1. Select the **Stat ID** for the run you want to view and the **Interface Rejects** i-frame displays.
    - You can scroll to the bottom and select **Show All** in the last row to view all run statistics. However, there is a limit on how much data M5 can display at one time.
2. If an **Error Msg No.** is available, you can hover over it with your mouse to display the message.
3. After you have made the necessary corrections in M5, you can select the **Resubmit** checkbox for each record you want to resubmit.
4. You can also delete any records you do not want to fix or resubmit.
5. Select **SAVE** to reprocess the rejected records.

Error Processing

If a transaction record fails to process, the data transaction data (along with the error message) will be passed to the common FleetFocus M5 interface reject infrastructure.

The common FleetFocus M5 interface reject infrastructure includes interface statistic information (how many records processed, how may records failed, how many records were reprocessed, or how long did the interface run) as well as rejected transactions for each interface execution cycle.

Additional Considerations, Configuration, and Processing Logic

- If System Flag 5133 is set to 1, the user must have a tax scheme on the vendor records being read in, if it is set to 2, Vendor Tax schemes are optional, if set to 3, Vendor Tax schemes cannot be entered (and, if the data exists already due to changed flags and such, no vendor tax data will be referenced.
- System Flag, 2041, must be set to Y so that any non-stock parts can be issued. If this flag is set to N, both non-stock and stock parts reserved to an asset (WO/Unit/Department/IA/DA) remain in RESERVES and will not be issued.
- All parts issues lines being issued to a Work Order must also include the job in the input file.
- If System Flag 1321 is set to Y and the part being received is non-stock, then a failure code is required.
- If the part is flagged to have required position codes, then a position code is required.
- If the job is flagged as requiring position codes Always, the position code must be provided.
- If the job is flagged as requiring position codes Sometimes the position code is optional.
- If System Flag 5016 = A (advanced position code functionality) and 1321, the part setup, and/or job setup require position codes, there must be a separate line for each part in the received quantity that includes a position code.
- If System Flag 1021 is set to Y, then the PO will be automatically completed if all parts have been received.
- If System Flag 1075 is set to Y, then more parts can be received than ordered.
- If System Flag 1339 is set to Y, then an invoice number will be required.
- If System Flag 5385 = V, Vendor/Invoice duplications will be rejected. If set to W or N, duplications will be processed with no rejection.
- All parts that are being issued upon receipt will follow the logic or rules of System Flag 1340, which includes references to System Flag 5030, and System Flag 1340. Notes on System Flag 1340 are as follows:
    - *If set to Yes, parts cannot be issued on receipt to either units or departments and must be put into reserves.*
    - *If System Flag 5030 is set to N, and*
    - *if System Flag 1340 is set to N, then parts can be issued to Work Order, Unit Number, Direct Account, Indirect Account and Department.*
    - *if System Flag 1340 is set to Y, then parts can be issued to Work Order, Direct Account and Indirect Account.*
    - *If System Flag 5030 is set to Y, and*
    - *if System Flag 1340 is set to N, then parts can be issued to Work Order and Unit Number.*

    - *if System Flag 1340 is set to Y, then parts can be issued to Work Order only.*
- If System Flag 2055 is set to Y, then the part may have a zero unit cost, otherwise, a cost must be supplied. If this flag is set to Y and a cost is supplied, the system uses the value in the file for the receipt.
- Part numbers must be valid M5 Part Numbers or Xrefs and must be on the associated PO to be able to be received.
- If System Flag 5400 is set to Y, then a vendor effective date must be supplied; otherwise, the record will be rejected.

  Vendor effective date has no logic associated with it (can't be before, after and such) but should include a date/time value. If only a date is provided in the data file, the time will default to midnight (for example, 00:00:00).

Any or all other system flags that affect or otherwise change processing rules or requirements will be adhered to as well, even if they are not mentioned in this document.

5. WO Transaction Template

The WO Transaction Template interface provides a method to load external work order data and create work orders in bulk based on that data. This functionality saves organizations the work of manually keying in large amounts of data.

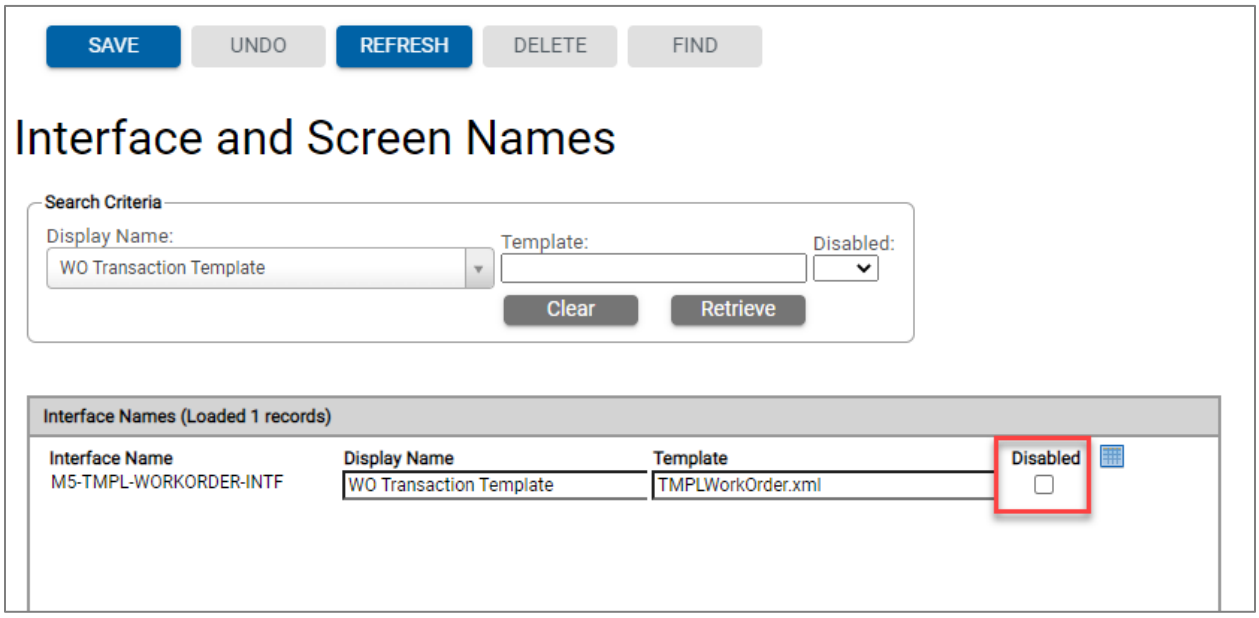
The interface performs the following functions:

- Creates work orders
- Updates work orders[1]
- Completes work orders
- Closes work orders

This interface is available to licensed clients only. Please contact AssetWorks Customer Support (1-610-225-8300, M5Support@Assetworks.com) or your project manager for more details on purchasing.

Interface and Screen Names

Before you can run the interface, you must make sure the interface is enabled for use.



[1] Such as: additional jobs or commercial charges related to labor, parts, or miscellaneous values.

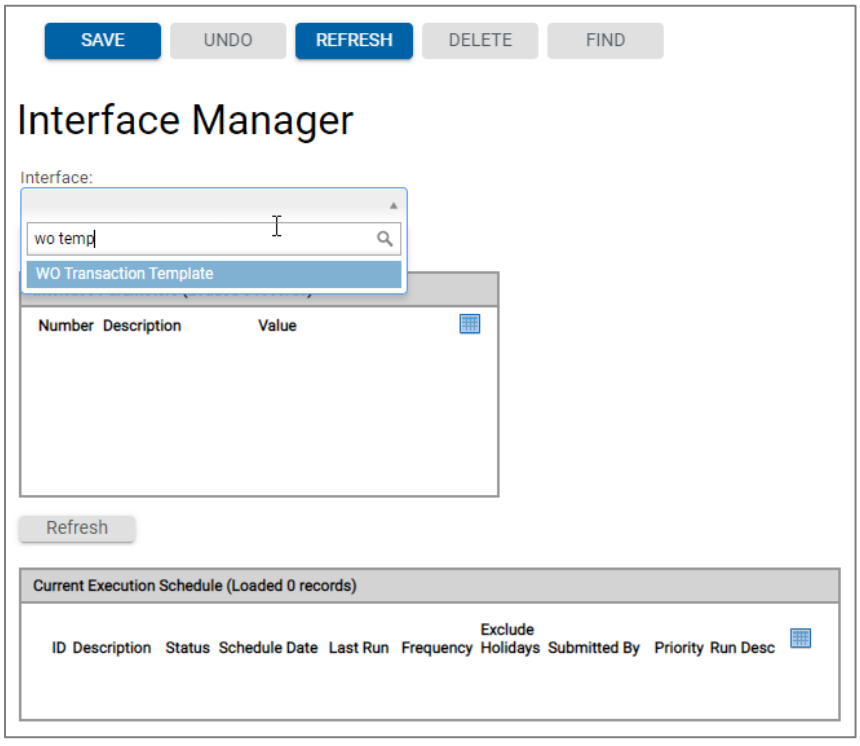
To verify:

1. Navigate to the **Interface and Screen Names** frame.
2. Scroll the list until you find: **M5-TMPL-WORKORDER-INTF** on the list. Alternatively, you can search for the interface in the **Display Name** dropdown and select the **Retrieve** button.
3. Make sure the **Disabled** checkbox is cleared.
4. If it is selected and you want to run the interface, clear the checkbox and select **SAVE**.

Interface Manager

After verifying that the interface is enabled for use, navigate to the **Interface Manager** frame. To locate the interface, select from the dropdown list or enter the name.

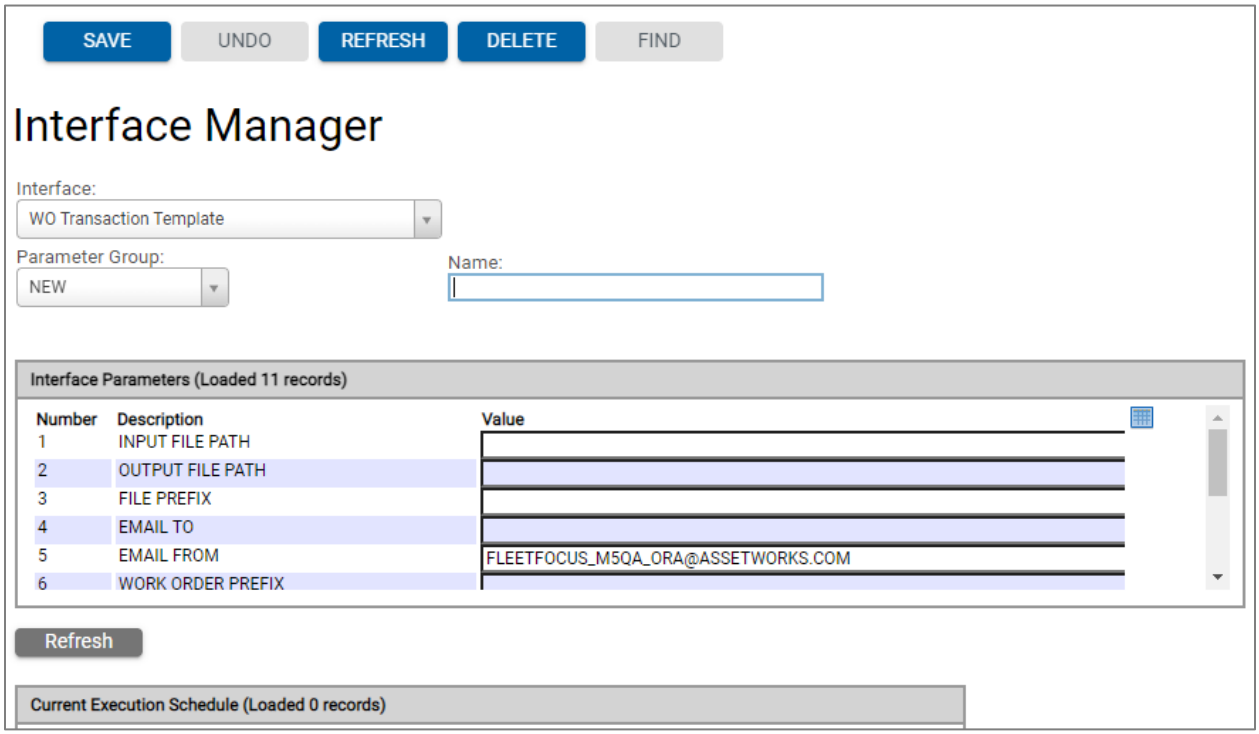
After you select the interface from the dropdown, Interface Parameters, Current Execution Schedule, and Schedule Details display.



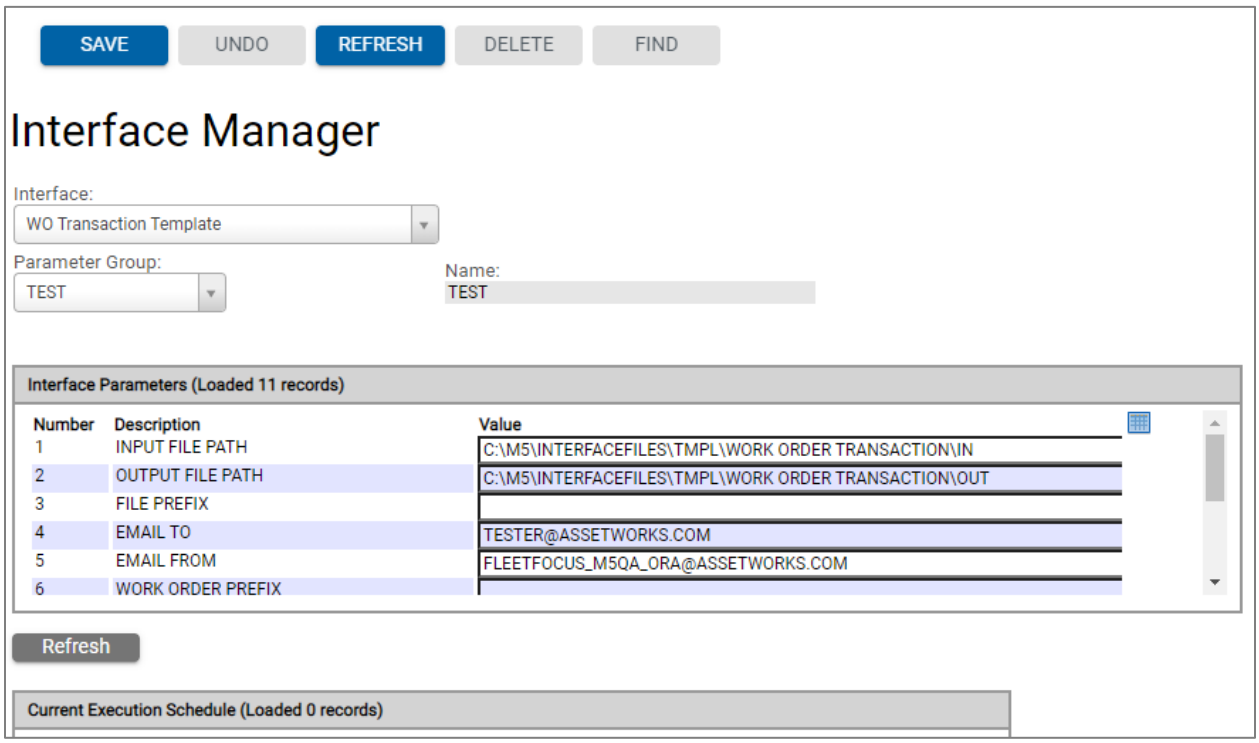
- You can select an existing **Parameter Group** from the dropdown.
- If this is your first time using the interface, the only option will be NEW. You can use this option to create and save a new parameter group for future use.

- To create a new group, select NEW from the dropdown, enter a name in the **Name** field, define parameter values (explanations below), and select the **SAVE** button.
- You can run the interface without saving your parameters.

Interface Parameters



Interface Parameter Explanations



Parameter Name	Description	Required (Y/N)
INPUT FILE PATH	File path where the input file will be found by the interface program. Note: This path refers to the C: drive on the batch server. The directory name should not end with a "\", and can either be a mapped drive (C:, Q:, etc.) or with a \\server name\share\directory format. The interface will process any files found in this directory with a .csv extension.	Y
OUTPUT FILE PATH	File path where the file will be moved upon completion of the interface. Note: This path refers to the C: drive on the batch server. The directory name should not end with a "\", and can either be a mapped drive (C:, Q:, etc.) or with a \\server name\share\directory format. The file is renamed with the date and time. For example, a file named WODATA.csv will be renamed as WODATAyyyymmddhhmmss.csv where yyyymmdd represents year/month/day and hhmmss represents hour/minutes/seconds.	Y

Parameter Name	Description	Required (Y/N)
FILE PREFIX	This is an optional parameter that allows you to specify a part of the file name that will be added to the beginning of each processed file as a prefix.	N
EMAIL TO	User/Account to whom any email updates will be sent upon about the interface run. If you need multiple emails to receive these notifications, it is recommended to create a distribution group on the mail server that consists of those email addresses. Completion emails will include a count of good and bad records. The email will also include a list of files processed by the interface run.	Y
EMAIL FROM	User/Account from whom the email originates - default will be determined by the M5 Parameter values **FROM_EMAIL_NAME** and **CE_EMAIL_DOMAIN.** If this parameter is set to INTERFACE@ASSETWORKS.COM or left blank, the default option above will be used to construct the email address. If the parameter contains any other value, that entry will be used as the **EMAIL FROM** address.	N
WORK ORDER PREFIX	This parameter allows you to add a prefix to the work order reference number. Limited to two alphanumeric characters not to exceed the work order number size limit of ten.	N
CLOSE WORK ORDER	This parameter allows you to automatically set work orders to CLOSED once they are COMPLETED. If the parameter is set to N then work orders will only be completed by the interface and will still need to be closed manually in M5. If set to Y work orders will be set to 00:00:00 of the date of the interface run. Work orders *created and completed* in the same interface run will automatically close, regardless of this parameter setting.	Y
DEFAULT CLOSE WO REASON	This parameter allows you to define a default close reason for processing corrections to work orders in M5 that have been closed.	N

Parameter Name	Description	Required (Y/N)

METER OVERRIDE (Y/N/I/X)	This is the standard M5 Meter Override parameter.
	• Y – Meter warnings, except for rollovers, are ignored.
	  ▪ Rollover warnings are sent to the Reject Manager frame, no transactions are posted.
	  ▪ All other transactions with meter warnings will not be sent to the Reject Manager.
	• N – Meter warnings, including rollover warnings, will cause the transaction to be sent to the Reject Manager frame. No transactions are posted.
	• I – Transactions with meter warnings will not be rejected by the validation process. Meter journal, meters and usage, will not be updated, transactions will process with Bad Meter set to Y.
	• X – Meter readings from the input file are ignored completely. Transactions will post without entries in Meter Journal or updates to meters and usage.
		Y

DATE FORMAT (MM/DD/YYY or DD/MM/YYYY)	This parameter allows you to determine which of the two formats the incoming date will be in. If left blank, the default is MM/DD/YYY.	N

Sample Data

The following is a list of sample data that illustrates what the work order data would look like within the .csv input file to be processed by the interface.

- The first example is just the M5 database field names. The next three examples are what it would look like with sample data that corresponds to those fields.
- There is a File Data table at the end of this document that you can reference to see more information about these fields like position, header value, definition, tables/columns, data type/size, description, processing logic, and whether it is a required field.

```
VendorNo,WorkLocation,WorkReferenceNumber,VehicleID,VehicleRegNo,Meter
Reading,MeterReading2,WorkReason,ContactName,ContactNumber,ContactExt,
WorkFirstNotifiedDate,CompletionDueDate,WorkCompletedDate,WorkStartedD
ate,JobCode,JobReference,JobReason,JobStatus,JobEstimatedHrs,JobEstima
tedCost,JobCompletedDate,JobSymptom,WarrantyJob,ChargeType,EffectiveDa
te,CommLabourChargeValue,MiscChargeValue,LabourHours,ChargeReference,P
ositionCode,PartNumber,PartManufacturer,PartDescription,PartQty,PartCo
st,InvoiceNo,PONo,PartFailureCode,PartWarrantyMonths,PartWarrantyMiles
,PartWarrantyVendor,WorkOrderNotes,JobNotes
```

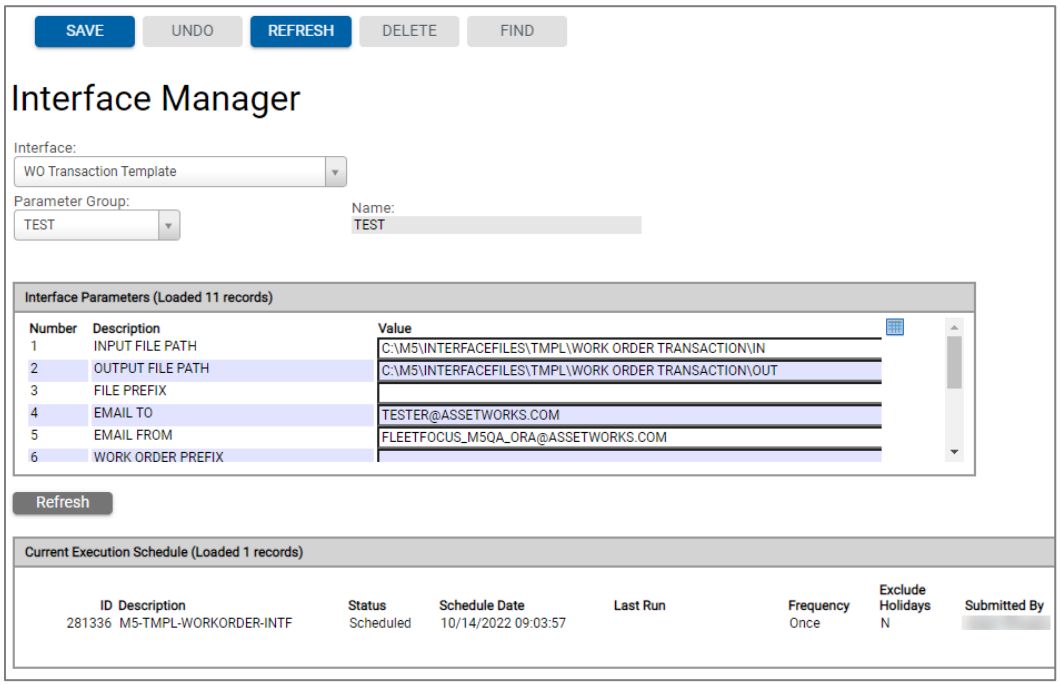
1,CONN,TMPL225,020,,93603,,3,RUSSELL,999,999,,,22/12/2020 08:24,22/12/2020 06:00,0101,UK901PA132,X,DON,,,22/12/2020 08:24,,N,C,19/10/2019 08:24,,44,,,RF,,,RAC002 5 Year Warranty Battery,2,107.49,UKINV2527,,,,,,Battery Flat - Other Charge and Retest by Battery Tester,Battery Flat - Other Charge and Retest by Battery Tester

1,CONN,2105,BELLUNIT1,ALTBELL,93603,,3,RUSSELL,999,999,,,10/11/2020 08:24,10/11/2020 06:00,0101,UKTTTPA132,Y,VEN,15,,10/11/2020 08:24,,N,C,19/10/2019 08:24,,44,,,RF,,,RAC002 5 Year Warranty Battery,4,107.49,UKINV2527,,,,,,Battery Flat - Other Charge and Retest by Battery Tester,Battery Flat - Other Charge and Retest by Battery Tester

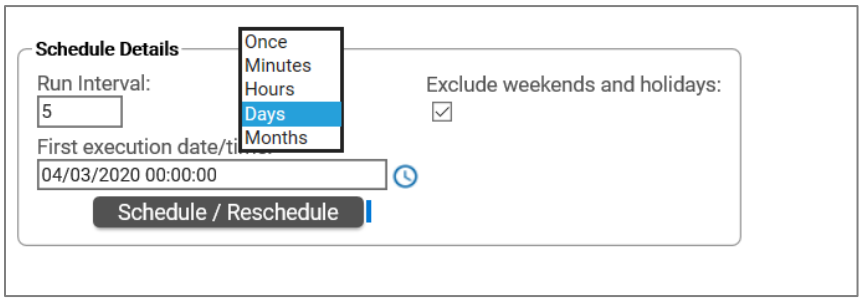
1,CONN,2108,JO5555,ALTBELL,195030,200,3,RUSSELL,999,999,,,21/05/2021 08:24,21/05/2021 06:00,0101,UKTTTPA132,Y,DON,15,,21/05/2021 08:24,,N,C,21/05/2021 08:24,,44,,,RF,,,RAC002 5 Year Warranty Battery,4,107.49,UKINV2527,,,,,,Battery Flat - Other Charge and Retest by Battery Tester,Battery Flat - Other Charge and Retest by Battery Test.

Current Execution Schedule

This i-frame displays the current execution schedule for this interface. Current and previously scheduled runs display the ID, Description, Status, Scheduled Date, Last Run Date, Frequency, Exclude Holidays, Submitted By and Run Desc fields.



Schedule Details

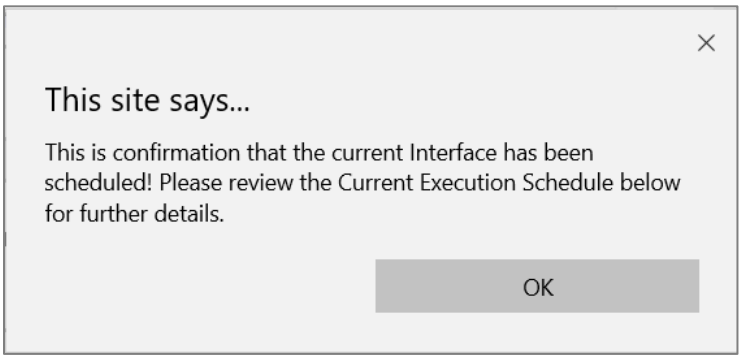


To schedule the interface, enter schedule details.

1. Select the run interval (Once, Minutes, Hours, Days, Months).
    - If only running one time, currently, you can select **Once**, then select the **Schedule/Reschedule** button.
    - If you select Minutes, Hours, Days, or Months, enter a value for the interval in the **Run Interval** field that displays after selection is made.

2. If you would like to exclude weekends and holidays from the run, select the **Exclude Weekends and Holidays** checkbox.
3. Enter a **First Execution Date/Time** from which the run interval value should apply.
4. When finished, select the **Schedule/Reschedule** button.

You will receive the following message:



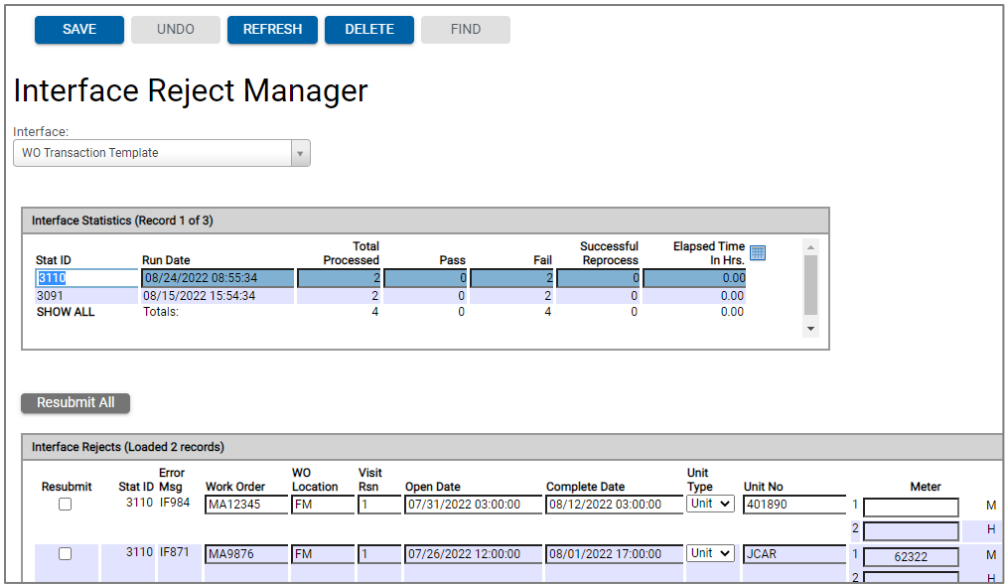
The scheduled run appears on the **Current Execution** i-frame. It can also be viewed on the **System Run List of Jobs** frame.

To view interface rejects, refer to the **Interface Reject Manager** frame.

Interface Reject Manager

To view rejects for the WO Transaction Template interface, navigate to the **Interface Reject Manager** frame.

To locate the interface, select from the dropdown list or enter the name.



After selected, the **Interface Statistics** i-frame displays.

1. Select the **Stat ID** for the run you want to view and the **Interface Rejects** i-frame displays.
2. You can scroll to the bottom and select **Show All** in the last row to view all run statistics. However, there is a limit on how much data M5 can display at one time.
3. If an **Error Msg No.** is available, you can hover over it with your mouse to display the message.
    - Example: PS133 – Standard Price must be a positive number.
4. After you have made the necessary corrections in M5, you can select the **Resubmit** checkbox for each record you want to resubmit.
5. You can also delete any records you do not want to fix or resubmit.
6. Select **SAVE** to reprocess the rejected records.

Error Processing

If a transaction record fails to process, the data transaction data (along with the error message) will be passed to the common FleetFocus M5 interface reject infrastructure.

The common FleetFocus M5 interface reject infrastructure includes interface statistic information (how many records processed, how may records failed, how many records were reprocessed, or how long did the interface run) as well as rejected transactions for each interface execution cycle.

6. Expanded Interface File Data

Commercial Fuel Template

Position	Definition	Tables/ Columns	Character Limit/Data Type	Description	Logic Applied	Required
1	Unit Number	F_COMM_PROD_CHG.UNIT_ID	30	Unit or Department number that was issued fuel	Unit Id will be derived from UNIT_DEPT_COMP_MAIN using Unit Number. If this is a department, the interface will check to see if there is a translation in Interface Code Translations. If this number is not a Unit or a Department, then check to see if the value matches an Alternate Unit Number in M5.	Y
2	Issue Date/Time	F_COMM_PROD_CHG.ISSUE_DT	Date	Date the product was issued	The time on the incoming value will be adjusted based on the database time zone.	Y
3	Vendor Number	F_COMM_PROD_CHG.VENDOR_ID	11	Vendor number	If blank, the DEFAULT VENDOR parameter value will be used. If valued, the interface will check to see if there is a translation on Interface Code Translations.	LOGIC
4	Location	F_COMM_PROD_CHG.LOCATION	5	Location for the product issued	If blank, the DEFAULT LOCATION parameter value will be used. If valued, the interface will check to see if there is a translation on Interface Code Translations.	LOGIC
5	Issue Quantity	F_COMM_PROD_CHG.ISSUE_QTY	Numeric, 2 decimal places	Amount of Fuel issued		

Position	Definition	Tables/ Columns	Character Limit/Data Type	Description	Logic Applied	Required
6	Product Number	F_COMM_PROD_CHG.PROD_NO	2	Must be valid M5 Product	The program will check to see if there is a translation on Interface Code translations.	LOGIC
7	Meter	F_COMM_PROD_CHG.NEW_METER, UNIT_DEPT_COMP_MAIN.METER, METER_JNL.NEW_METER	Numeric		Used to calculate LTD_USAGE.	N
8	Unit Dollar	F_COMM_PROD_CHG.UNIT_DO	Numeric, 2 decimal places	Price per unit of measure		
9	User Data 1	F_COMM_PROD_CHG.USER_DATA_1		Free format		N
10	User Data 2	F_COMM_PROD_CHG.USER_DATA_2		Free format		N
11	User Data 3	F_COMM_PROD_CHG.USER_DATA_3		Free format		N
12	User Data 4	F_COMM_PROD_CHG.USER_DATA_4		Free format		N
13	User Data 5	F_COMM_PROD_CHG.USER_DATA_5		Free format		N
14	User Data 6	F_COMM_PROD_CHG.USER_DATA_6		Free format		N
15	Employee Number	F_COMM_PROD_CHG.EMPLOYEE_NO	11	Employee Number		

In-House Fuel Template

Field Name	Size/Format	Start Position – Fixed Format	Position – Delimited format	Tag – XML Format	Comments/Optional or Required
Unit Number	30, Varchar2	1	1	<UNIT_NO>	Must be a valid M5 Unit or Department Number.
Transaction Date	19, Varchar2	31	2	<ISSUE_DATETIME>	Issue date - must be a valid date in the format determined by the DATE FORMAT parameter. Only 2 date formats are recognized: MM/DD/YYYY HH24:MI:SS DD/MM/YYYY HH24:MI:SS
Hose Number	5 Numeric	50	3	<HOSE_NO>	If valued, must be a valid M5 Hose Number for the transaction's LOCATION. If tank number is blank, Hose Number must be valued.
Tank Number	5 Numeric	55	4	<TANK_NO>	Optional. If valued must be a valid M5 tank number for the transaction's LOCATION. If Hose is blank, Tank Number must be valued.
Location	50 Varchar2	60	5	<LOCATION>	Required. Must be a valid M5 Location or exist as a translation in Interface Code Translations under the Location drop down. If left blank in the file, the DEFAULT LOCATION parameter value will be used.
Issue Qty	8 Numeric	110	6	<ISSUE_QTY>	Must be numeric. Decimal point will be explicit (for example, 23.45).
Fuel Type	50 Varchar2	118	7	<PROD_NO>	Optional. Must be a valid M5 Product code or exist as a translation in Interface Code Translations under the Product dropdown.
Meter	9 Numeric	168	8	<METER>	Meter. Optional. Will be subject to all usual M5 meter validation rules.

Field Name	Size/Format	Start Position – Fixed Format	Position – Delimited format	Tag – XML Format	Comments/Optional or Required
User Data 1	15 Varchar2	177	9	<USER_DATA_1>	User reference information. Optional. Value greater that 15 chars will be truncated. Value is not validated.
User Data 2	15 Varchar2	192	10	<USER_DATA_2>	User reference information. Optional. Value greater that 15 chars will be truncated. Value is not validated.
User Data 3	15 Varchar2	207	11	<USER_DATA_3>	User reference information. Optional. Value greater that 15 chars will be truncated. Value is not validated.
User Data 4	15 Varchar2	222	12	<USER_DATA_4>	User reference information. Optional. Value greater that 15 chars will be truncated. Value is not validated.
User Data 5	15 Varchar2	237	13	<USER_DATA_5>	User reference information. Optional. Value greater that 15 chars will be truncated. Value is not validated.
User Data 6	15 Varchars	252	14	<USER_DATA_6>	User reference information. Optional. Value greater that 15 chars will be truncated. Value is not validated.
Employee Number	11 Varchars	315	15	<EMP_NO>	Must be valid M5 Employee Number. May be blank, but is mandatory if System Flag 5077 or Unit Product Setup Employee Required is set to Y.

Part Purchase Order Export

Field Name	Position	Description	M5 Field/Value	Processing Decision
PO NUMBER	1	M5 purchase order number	part_po.po_no	Linked to PART_ORDERS by PO_ID.
LOCATION	2	Location issuing the PO	Part_po.location	
ORDERED BY	3	Person who created the PO	Part_po.ordered_by	
PO REF NO	4	Reference number, not required	Part_orders.ref_no	PART_PO.PO_REFERENCE
VENDOR NUMBER	5	M5 vendor number		Join part_orders.vendor_id to table vendor to get vendor number.
PO STATUS	6	Purchase order status	Part_orders.part_status	Only send purchase orders in ordered status.
PO ORDER DATE	7	Date order was placed	Part_orders.order_dt	
LINE NO	8	Line number	Part_orders.po_line	
PART NO	9	Part number being ordered		Join part_orders.part_id to parts.part_id to get part number.
CONTRACT	10	Contract number	part_orders.contract_no	
RECV LOCATION	11	Location receiving the parts	Part_orders.location	
QTY	12	Quantity	Part_orders.qty_req	
UNIT COST	13	Cost per unit or measure	Part_orders.unit_do	
CORE COST	14	Core charge	Part_orders.core_do	
UNIT OF ORDER	15	Unit of measure	Part_orders.inventory_um	

Field Name	Position	Description	M5 Field/Value	Processing Decision
LINE TOTAL	16	Qty * unit cost		
NEEDED BY	17	Date wanted by	Part_po.reqd_dt	Must be in mm/dd/yyyy hh:mm:ss format.
RESV CODE	18	If it is a non-stock part, where is this part going? WO, IA, DA, DEPT	part_orders.type_code	
RESV REF NO	19	Depending on the 'resv code', but this could be the job, the indirect or direct code or department number		
REQ NO	20	Requisition number, if used		Join part_orders.req_id to part_req.req_id to get requisition number.
NOTE	21	Notes pertaining to the corresponding line	part_orders.notes	

Part PO Receipt Template

Field Name	Size and Data Type	Position – Delimited format	Start Position – Fixed format	Comments/Description
Location	6 varchar2	1	1	N/A
Vendor Number	11 varchar2	2	7	If the employee number does not exist, then create the employee record; else, look to see what fields have change and update accordingly.
Purchase Order Number	15 varchar2	3	19	Must be a valid Purchase order that is not in the status MCLOSED or ACLOSED.
Employee Number	11 varchar2	4	11	If valued must be a valid Employee Number. Required if System Flag 5013 is Y.
Invoice Number	15 varchar2	5	15	Required if System Flag 1339 is Y. If System Flag 5385 is V, then the Invoice Number/Vendor Number must be unique.
Vendor Invoice Date	19 varchar2	6	60	Must be a valid date in MM/DD/YYYY HH24:MI:SS or DD/MM/YYYY HH24:MI:SS format.
Effective Date	19 varchar2	7	79	Must be a valid date in MM/DD/YYYY HH24:MI:SS or DD/MM/YYYY HH24:MI:SS format.
Tax Scheme	10 varchar2	8	98	If valued, must be a valid Tax Scheme.
Apply Discount	6 numeric	9	108	Optional. Must be numeric, between 0 and 100 with 2 explicit decimal places.
PO Line	10 numeric	10	114	Must be a valid PO Line on this Purchase Order.
Part Number	30 varchar2	11	124	Must be a valid Part Number. Lotted or Serialized Parts will be rejected.
Unit of Inventory	11	12	154	Must be a valid UOM.

Field Name	Size and Data Type	Position – Delimited format	Start Position – Fixed format	Comments/Description
	varchar2			
Received Qty	10 numeric	13	165	Must be a valid integer. No decimal places permitted.
Unit Cost	6 numeric	14	175	Must be a valid number greater than 0 with 2 explicit decimal places.
Core Flag	1 char	15	181	Core Flag - optional
Core Dollar	6 numeric	16	182	Required if Core Fl is Y. Must be a valid number greater than 0 with 2 explicit decimal places.
Reservation Type Code	2 varchar2	17	188	Part reservation type. Valid values, DA, DE, IA, ST, UN, WO, Must match the reservation code on the PO_LINE.
Reservation Type Number	175 varchar2	18	190	When Type code is: DA - Direct account DE - Department number IA - Indirect Account ST - Stock part or no reservation - received to PO UN - Unit Number WO - Work Order Must match the reservation type number on the PO Line.
Issue Part	1 char	19	315	Y or N or blank. If a part is reserved to an entity, the receipt of the part will also trigger an issue to that entity.
Job Code	10 varchar2	20	316	Job Code. Required when Reservation type is WO. Must be a valid job on the Work Order in Reservation Type Number.

Field Name	Size and Data Type	Position – Delimited format	Start Position – Fixed format	Comments/Description
Failure Code	6 varchar2	21	326	Required when part is being issued to an entity and System Flag 1321 is Y. Must be a valid M5 Failure code if valued.
Position Code	3 varchar2	22	332	Required when standard M5 business rules apply and must be a valid position code if valued.

WO Transaction Template

Position	Header Value	Definition	Tables/ Columns	Data Type/ Size	Description	Logic Applied	Required
1	VENDOR	Valid M5 Vendor	O_COMM_CHG.VENDOR_ID	12	Used to enter proper vendor, when applicable.	Used for Comm Charges.	LOGIC
2	LOCATION	Valid M5 Location	O_WO.LOCATION	6	Location of the Work Order.	Used for all transactional data (WO Location, Job Loc, PILM, and such).	Y

Position	Header Value	Definition	Tables/ Columns	Data Type/ Size	Description	Logic Applied	Required
3	WORK ORDER	This value is required and is appended to the Work Order Prefix Parameter (if parameter is blank, this number is used as-is).	O_WO.WO_NO, O_JOB.WO_NO, O_COMM_CHG.WO_NO	10	Work Order Number	Use this number appended to the WO Prefix Parameter to create and/or update WOs.	Y
4	VEHICLE ID	Valid M5 Unit Number OR (for updates only) a valid Departmen t number.	O_WO.UNIT_ID	30	Unit Number	No WO Creation for Departments, only updates If Unit# on row does not exist, check to see if it's an Alternate ID. If the value in this position is not a Unit # or Alternate ID, then check the value in the ALT VEHICLE ID position. If that is not a valid unit, then use this value to see if it is a Department.	LOGIC

Position	Header Value	Definition	Tables/ Columns	Data Type/ Size	Description	Logic Applied	Required
5	ALT VEHICLE ID	Valid M5 Alternate Unit Number	Resolve to O_WO.UNIT_ID	30	Alternate Unit Number	Only checked if unit# value does not resolve to a valid unit (or if Unit# is blank). If Unit# and Alt. ID do not return a valid unit, then check to see if VEHICLE ID is a department value.	LOGIC
6	METER1	Numeric value, no decimal places	O_WO.METER/O_WO.METER_ADVANCED_FL	FLOAT	Meter 1 value, no decimal values allowed.	Follow standard meter logic based on parameter. Flags determine required or not.	FL
7	METER2	Numeric value, no decimal places.	O_WO.METER2	FLOAT	Meter 2 value, no decimal values allowed.	Follow standard meter logic based on parameter. Flags determine required or not.	FL
8	WORK REASON	Valid M5 Visit reason	O_WO.VISIT_REASON	1	Visit Reason	Used to create WO - must be valid Visit Reason in M5.	Y
9	CONTACT NAME	Free Text	O_WO.NOTIFY_NAME	60	Free Text	Contact information (name)	Y
10	CONTACT PHONE	Numeric value, no decimal places. Do not use delimiters.	O_WO.NOTIFY_PHONE	15	Numeric value, no decimal places. Do not use delimiters.	Value will be stored 'raw' and the mask returns proper formatting to the frame, itself.	N

Position	Header Value	Definition	Tables/ Columns	Data Type/ Size	Description	Logic Applied	Required
11	CONTACT EXT	Numeric value, no decimal places.	O_WO.NOTIFY_EXT	10	Numeric value, no decimal places.	Input file must match parameter setting for Date.	N
12	NOTIFY DT	Date/Time value, format = Date Format Parameter	O_WO.NOTIFY_DT	DATE	Date/Time value, format = Date Format Parameter	Input file must match parameter setting for Date.	N
13	PROMISE DT	Date/Time value, format = Date Format Parameter	O_WO.PROMISE_DT	DATE	Date/Time value, format = Date Format Parameter	Required if System Flag 5435 is Y.	FL
14	COMPLETED DT	Date/Time value, format = Date Format Parameter	O_WO.COMPLETED_DT	DATE	Date/Time value, format = Date Format Parameter	Input file must match parameter setting for Date. Use Date/Time of run if not provided and set to later than open date, if required (see open date logic).	N

Position	Header Value	Definition	Tables/ Columns	Data Type/ Size	Description	Logic Applied	Required
15	OPEN DT	Date/Time value, format = Date Format Parameter	O_WO.OPEN_DT	DATE	Date/Time value, format = Date Format Parameter	Input file must match parameter setting for Date. Use Date/Time of run if not provided. If another WO Exists for the same unit at a different location and opened on the same date, this value is adjusted to a later date/time value to allow the WO to be created.	N
16	JOB	Valid M5 Job Number (include delimiters)	O_JOB.JOB (and converts to an O_JOB.JOB_ID)	10	Valid M5 Job Number based on Flag 5001	Valid Job reasons following System Flag 5001 set up.	Y
17	JOB REF	Free Text	O_JOB.EX_DATA_1	15	External Data (if set on Job Reason)	External Data value if Job Reason set to use it.	FL
18	JOB REASON	Valid M5 Job Reason	O_JOB.JOB_REASON	1	Valid M5 Job Reason	Job reason will not be updated via interface run. This is only used for creation.	Y
19	JOB STATUS	Valid M5 Job Status	O_JOB.STATUS	3	Valid M5 Job Status	Only valid values are DON or VEN. If VEN, job status will be set to DON when WO is completed.	Y

Position	Header Value	Definition	Tables/ Columns	Data Type/ Size	Description	Logic Applied	Required
20	JOB ESTIM HRS	Numeric value, no decimal places.	O_JOB.LABOR_HRS	18	Numeric value, no decimal places.	Not required, if entered, value is recorded.	N
21	JOB ESTIM COST	Numeric value, two decimal places.	O_JOB.ESTIM_DO	28.6	Numeric value, two decimal places.	Required based on System Flag 5499.	FL
22	JOB COMP DT	Date/Time value, format = Date Format Parameter	O_JOB.COMPLETED_DT	DATE	Date/Time value, format = Date Format Parameter	Input file must match parameter setting for Date. Follow Open/Complete date logic above if not provided.	N
23	JOB SYMPTOM	N/A	N/A – Not Used.	N/A	N/A	N/A	N
24	WARRANTY	Indicate Warranty Repair, valid values are Y, N, or Blank (N/Blank = Not a warranty job).	O_JOB.WARRANTY_VIOLATION_FL	1	Indicate Warranty Repair, valid values are Y, N, or Blank (N/Blank = Not a warranty job).	**Note:** If Complaint/Cause/ Correction notes are required as per System Flags, WOs will be created (when set to Y) but will not be closed.	N

Position	Header Value	Definition	Tables/ Columns	Data Type/ Size	Description	Logic Applied	Required
25	CHARGE TYPE	Valid values are C/P/N	N/A - Used to tell the interface how to manage the line.	1	C = Commercial Charges P = Part Charges N = Open Wo	Logic to determine how charges for the line are entered in an instance where multiple lines exist for the same WO, or if to only open WO. C=Commercial Charges P=Parts Charges N=Leave WO Open	Y
26	EFF DT	Date/Time value, format = Date Format Parameter	O_COMM_CHG.EFF_DT	DATE	Commercial Charges Part Issues	Input must match parameter value. Required for Commercial and/or Part Charges. Date will be adjusted as per Open/Complete Date logic, as well.	LOGIC
27	LABOR DO	Numeric value, two decimal places.	O_COMM_CHG.LABOR_COST_DO	28.6	Work Order Commercial Charges Only	Work Order Commercial Charges Only	N
28	MISC DO	Numeric value, two decimal places.	O_COMM_CHG.MISC_COST_DO	28.6	Work Order Commercial Charges Only	Work Order Commercial Charges Only	N
29	LABOR HRS	Numeric value, no decimal places.	O_COMM_CHG.DURATION	18	Work Order Commercial Charges Only	Work Order Commercial Charges Only	N

Position	Header Value	Definition	Tables/ Columns	Data Type/ Size	Description	Logic Applied	Required
30	CHARGE REF	Free Text	O_COMM_CHG.REF_NO	19	Used only for Commercial Charge Records	Commercial Charge Ref no. Required for commercial charges if no Invoice No or PO No are entered for the line and System Flag 2031 states not to auto-generate commercial charge Pos.	LOGIC
31	POSITION CODE	Valid M5 Position Code for the Job Setup	O_PART_CHG.POSITION_CODE or O_COMM_CHG.POSITION_CODE	3	Valid M5 Position Code	Required if job setup states as such. If System Flag 5016 = A, only one position code can be entered per line and all quantity is considered issued to that position. To issue the same part to multiple positions, users would need to enter the values as separate lines in the input file.	LOGIC /FL
32	PART NO	Valid M5 Part Number (See logic)	O_PART_CHG/PARTS/PART_INV_LOC/PART_JNL	30	Valid M5 Part #, or new part to be created as NS, only required for Parts Charges rows.	If not a valid part# in M5, Interface will create a Catalog and PILM entry as a non-stock part in order to issue the part to the WO.	LOGIC

Position	Header Value	Definition	Tables/ Columns	Data Type/ Size	Description	Logic Applied	Required
33	PART MFG	Valid M5 Part Manufacturer	O_PART_CHG/PARTS/PART_INV_LOC/PART_JNL	30	Valid M5 Manufacturer	Required only if creating a part.	LOGIC
34	PART DESC	Free Text	O_PART_CHG/PARTS/PART_INV_LOC/PART_JNL	30		Required only if creating a part.	LOGIC
35	QTY	Numeric value, no decimal places.	O_PART_CHG/PARTS/PART_INV_LOC/PART_JNL	FLOAT	Only required for Parts Charges rows.	Required for issuing parts.	LOGIC
36	PART COST	Numeric value, two decimal places.	O_PART_CHG/PARTS/PART_INV_LOC/PART_JNL or O_COMM_CHG.PART_COST_DO	28.6	Flag dependent requirements	Required if flags set to require values for part creation and/or issuing. If Charge type = C and value exists, this is entered as Commercial Parts Charges.	FL
37	INVOICE NO	Free Text	O_PART_CHG/O_COMM_CHG.INV_NO	15	Used for Part Issues or Commercial Charges	Required for commercial charges is no Charge Ref or PO No exist for the line and System Flag 2031 states not to auto-generate commercial charge POs.	LOGIC

Position	Header Value	Definition	Tables/ Columns	Data Type/ Size	Description	Logic Applied	Required
38	PO NO	Free Text	O_PART_CHG/O_COMM_CHG. PO_NO	15	Used only for Commercial Charge Records	Required for commercial charges if no Charge Ref or Invoice No are provided unless System Flag 2031 is set to create the PO#.	LOGIC
39	FAILURE CODE	Valid M5 Failure Code	O_PART_CHG.FAILURE_CODE	6	Valid M5 Failure Code	Required if Job set to require it.	FL
40	WARRANTY TIME	Duration of Part Warranty for the Unit	UNIT_PART_WAR.TERMS_TIME	18	Unit Part Warr - Definition for part/unit combination if it doesn't exist.	Only entered if data exists on this line, otherwise, ignored.	N
41	WARRANTY USAGE	Usage limit of Part Warranty for the Unit	UNIT_PART_WAR.TERMS_USAGE	FLOAT	Unit Part Warr - Definition for part/unit combination if it doesn't exist.	Only entered if data exists on this line, otherwise, ignored.	N
42	PART WARRANTY VENDOR	Valid M5 Vendor	UNIT_PART_WAR.VENDOR_ID (derived)/UNIT_PART_WAR.VENDOR_NO	10, 12	Unit Part Warr - Definition for part/unit combination if it doesn't exist.	Only entered if data exists on this line, otherwise, ignored.	N
43	WORK ORDER NOTES	Free Text		4000	Work Order Notes		N

Position	Header Value	Definition	Tables/ Columns	Data Type/ Size	Description	Logic Applied	Required
44	JOB NOTES	Free Text		4000	Job Notes	Required if flag set to require notes (System Flag 5495) and job being set to DON status.	FL

Standard Interfaces

These Standard Interfaces come with the base M5 Application and do not require an additional license key.

1. Item Load (File)

The Item Load (File) interface allows you to create new master items records and load specific item values from a file for:

- Accidents
- Units
- Components
- Tech Specs
- Departments
- Vendors
- Part Purchase Orders
- Drivers
- Locations

Why:

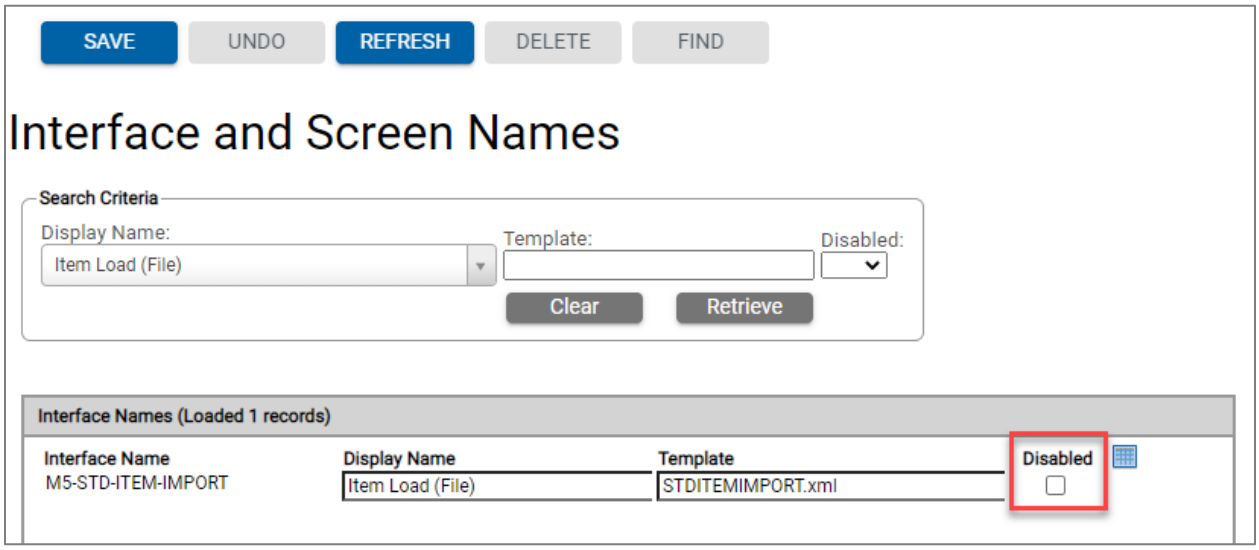
- Rather than update or create records one at a time, you can use this interface to update or create multiple records in one interface run.

How:

- The interface reads and validates items in the file and creates an ITEM_LIST master entry if the parameter is set.
- It also creates an entry for each item in the appropriate ITEM table.
- Rejects are sent to the Interface Reject Manager for further review and resubmission after corrections have been made.
- The interface creates a program log file that is useful in case of program failure.
- By default, it is located in the M5\Interface\Logs directory.
- After the interface completes running, an email is sent indicating the number of records successfully processed and any that failed validation rules and were rejected.

Interface and Screen Names

Before you can run the interface, you must make sure the interface is enabled for use.



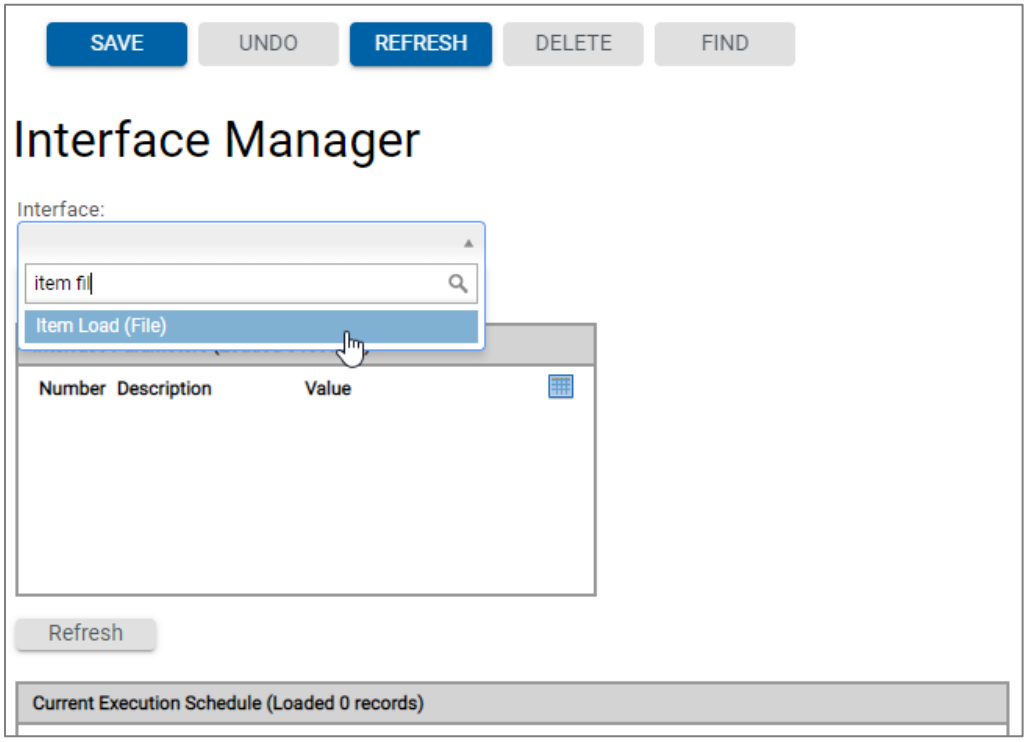
To verify:

1. Navigate to the Interface and Screen Names frame.
2. Scroll the list until you find: **M5-STD-ITEM-IMPORT** on the list.
3. Make sure the **Disabled** checkbox is cleared.
4. If it is selected and you want to run the interface, clear the checkbox and select **SAVE**.

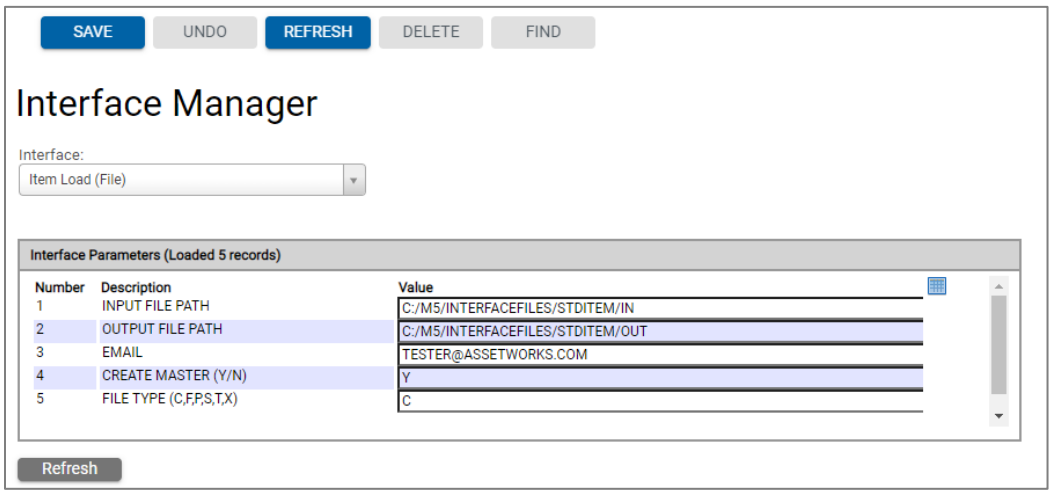
Interface Manager

After verifying that the interface is enabled for use, navigate to the **Interface Manager** frame. To locate the interface, select from the dropdown list or enter the name to find it quicker.

After you select the interface from the dropdown, Interface Parameters, Current Execution Schedule, and Schedule Details display.



Interface Parameters



- The most recent set of saved parameters load when the frame loads. Unlike some interface frames, you are not able to save different sets of parameters.
- To change any of the five values, enter in the new information and select **SAVE**.

Interface Parameter Explanations

Parameter Name	Description	Required (Y/N)
INPUT FILE PATH	File path where the input file will be found. Note: This path refers to the C: drive on the batch server. The directory name should not end with a "\", and can either be a mapped drive (C:, Q:, etc.) or with a \\server name\share\directory format.	Y
OUTPUT FILE PATH	File path where the file will be moved upon completion of the interface. Note: This path refers to the C: drive on the batch server. The directory name should not end with a "\", and can either be a mapped drive (C:, Q:, etc.) or with a \\server name\share\directory format.	Y
EMAIL	User to whom an email update will be sent about the interface run.	Y
CREATE MASTER (Y/N)	If set to Y, the interface will create a new ITEM_LIST master entry if one does not exist. If set to N, the interface will reject a transaction where the item does not exist.	Y

Parameter Name	Description	Required (Y/N)
FILE TYPE (C,F,P,S,T,X)	Type of file format being used as input. The file will be preprocessed into an XML message which will be sent to the interface. • C – Comma • F – Fixed • P – Pipe • S – Semicolon • T – Tab • X - XML	Y

The interface creates a program log file useful in case of program failure. By default, it will be in the M5\Interface\Logs directory.

File Data

XML Format

Tag Name	Description	M5 Column	Example
<TARGET>	Target Table Name. This table name will be translated to the correct target type for the ITEM_LIST. For example, if the Target Table Name is UNIT_ITEM, the program will translate this to U.	ITEM_LIST.TARGET	UNIT_ITEM translates to U.
<OVERWRITE_DATA>	If a value is found for this item, overwrite it if this flag is set to Y, otherwise leave the existing value.	N/A	N/A
<OBJECT>	The value of the object associated with this item.	N/A	UNIT_NO
<ITEM_VALUE>	The value to be assigned to this object's item. Will be validated using DATA_TYPE, to ensure that valid data is being place in the item.	XXXX_ITEM.VALUE	RED
<ITEM_NAME>	The item name.	ITEM_LIST.ITEM	COLOR
<DATA_TYPE>	Data type, must be C for character, N for numeric, D for date.	ITEM_LIST.DATA_TYPE	C

Fixed Format

Field Name	Start Position	Length	Valid Values	M5 Column
TARGET	1	15	N/A	ITEM_LIST.TARGET
OBJECT	16	30	N/A	XXXX_ITEM.XXXX_ID
OVERWRITE_DATA	46	1	Y or N	N/A
DATA_TYPE	47	1	C, D, or N	ITEM_LIST.FIELD_TYPE
ITEM_NAME	48	24	N/A	ITEM_LIST.ITEM XXXX.ITEM_VALUE
ITEM_VALUE	72	50	Data in this field must match the data type in DATA_TYPE.	XXXX_ITEM.VALUE

Delimited Format (includes comma, semicolon, tab, and pipe)

Field Name	Position	Valid Values	M5 Column
TARGET	1	N/A	ITEM_LIST.TARGET
OBJECT	2	N/A	XXXX_ITEM.XXXX_ID
OVERWRITE_DATA	3	Y or N	N/A
DATA_TYPE	4	C, D, or N	ITEM_LIST.FIELD_TYPE
ITEM_NAME	5	N/A	ITEM_LIST.ITEM XXXX.ITEM_VALUE
ITEM_VALUE	6	Data in this field must match the data type in DATA_TYPE.	XXXX_ITEM.VALUE

Sample Data

XML Format

```
<ITEMS>
  <ITEM>
    <TARGET>UNIT_ITEM</TARGET>
    <OBJECT>TXD1</OBJECT>
    <OVERWRITE_DATA>Y</OVERWRITE_DATA>
    <DATA_TYPE>C</DATA_TYPE>
    <ITEM_NAME>KEY #</ITEM_NAME>
    <ITEM_VALUE>7629A</ITEM_VALUE>
```

```
  </ITEM>
  <ITEM>
    <TARGET>SPEC_ITEM</TARGET>
    <OBJECT>08VWRB4</OBJECT>
    <OVERWRITE_DATA>N</OVERWRITE_DATA>
    <DATA_TYPE>N</DATA_TYPE>
    <ITEM_NAME>BUDGET YEAR</ITEM_NAME>
    <ITEM_VALUE>2007</ITEM_VALUE>
  </ITEM>
</ITEMS>
```

Fixed Format

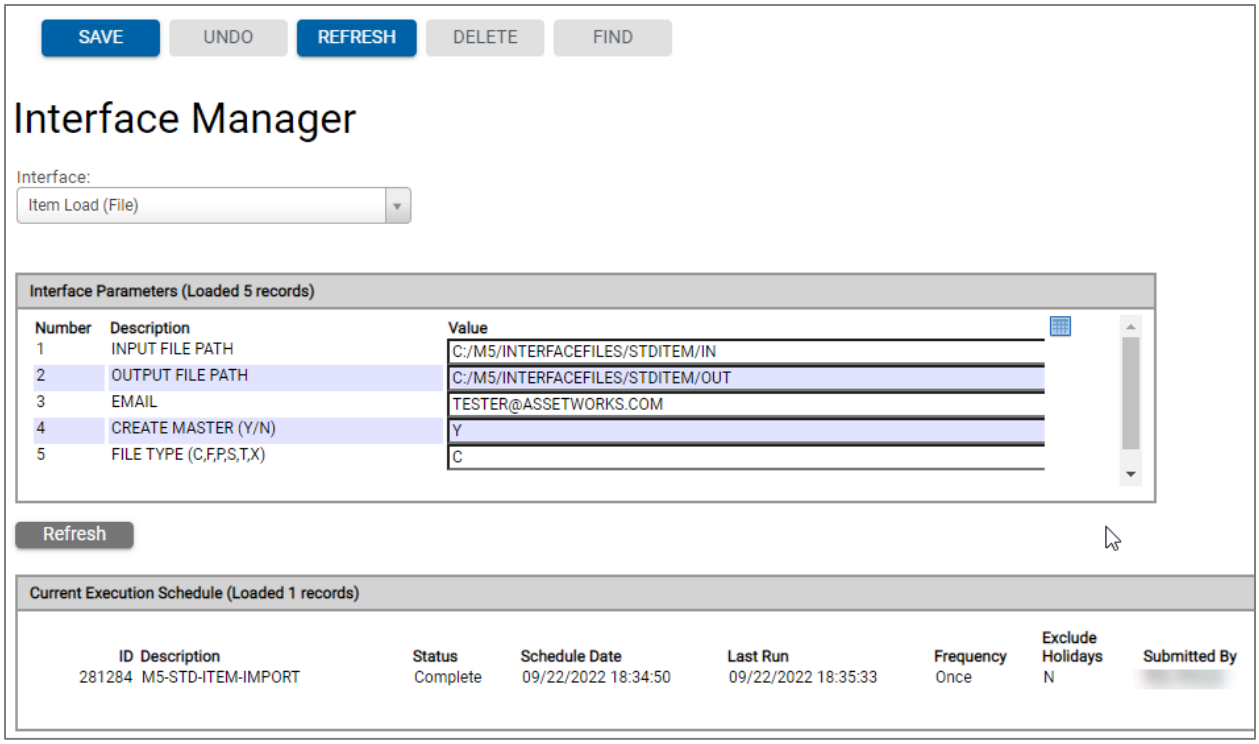
```
UNIT_ITEM     TXD1                YCKEY #             7629A

SPEC_ITEM     08VWRB4              NNBUDGET YEAR    2007
```

Delimited Format

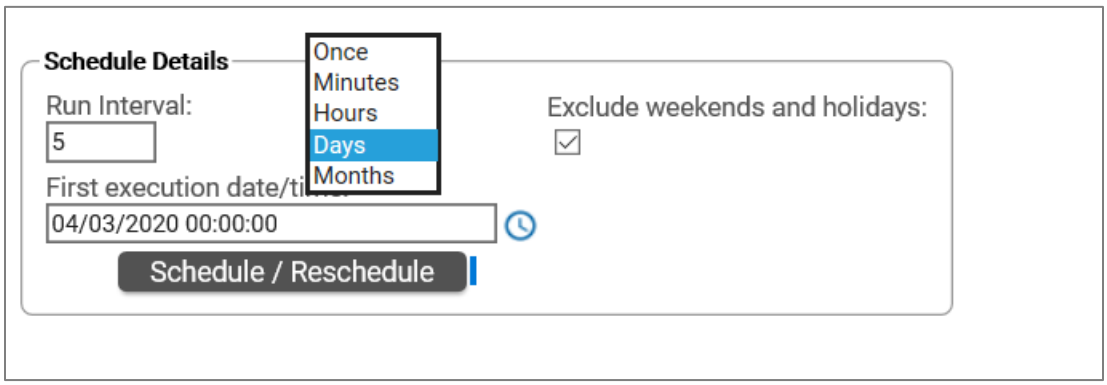
```
UNIT_ITEM,TXD1,Y,C,KEY #,7629A
SPEC_ITEM,08VWRB4,N,N,BUDGET YEAR,2007
```

Current Execution Schedule

This i-frame displays the current execution schedule for this interface. Current and previously scheduled runs display the ID, Description, Status, Scheduled Date, Last Run Date, Frequency, Exclude Holidays, Submitted By and Run Desc fields.



Schedule Details



To schedule the interface, enter schedule details.

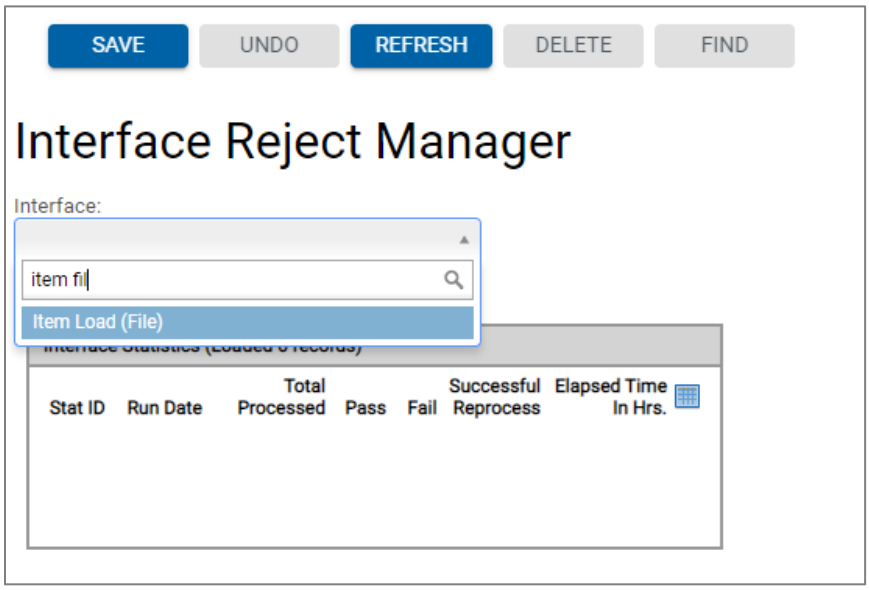
1. Select the run interval (Once, Minutes, Hours, Days, Months).
    - If only running one time, currently, you can select **Once**, then select the **Schedule/Reschedule** button.
    - If you select Minutes, Hours, Days, or Months, enter a value for the interval in the **Run Interval** field that displays after your selection is made.
2. If you would like to exclude weekends and holidays from the run, select the **Exclude Weekends and Holidays** checkbox.

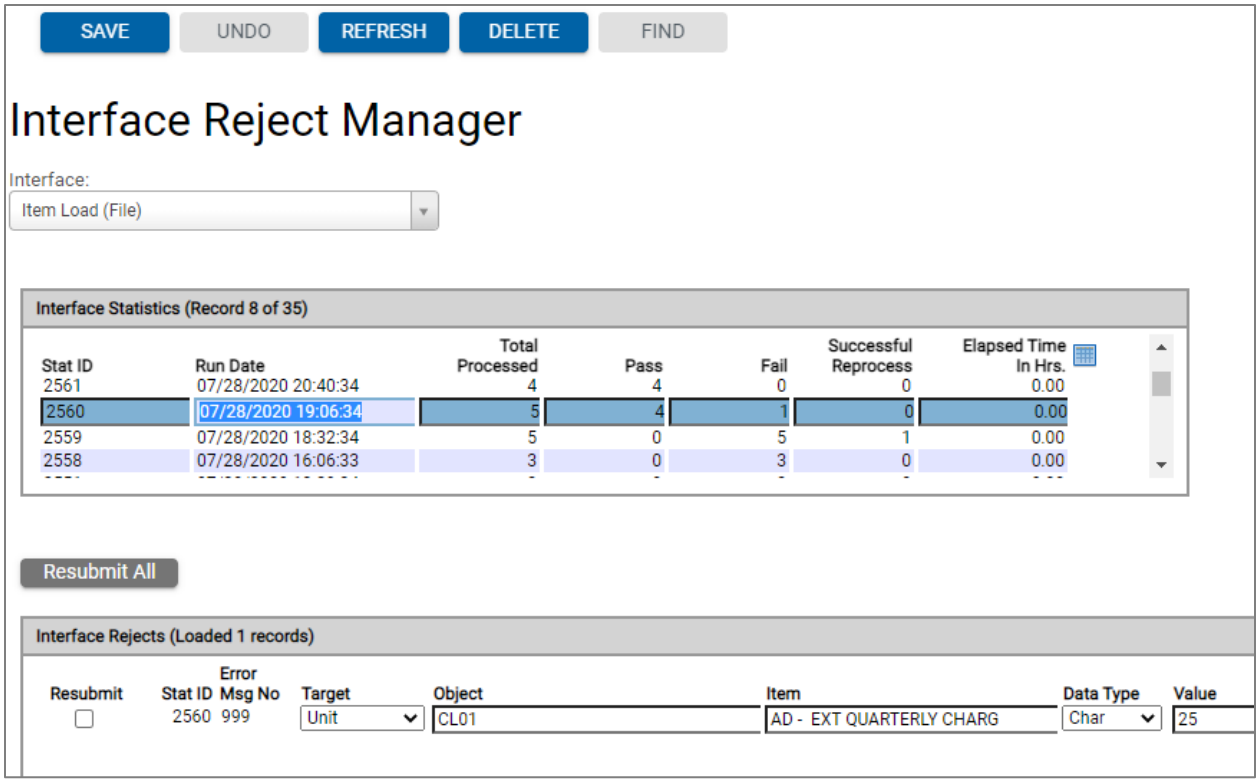
3. Enter a **First Execution Date/Time** from which the run interval value should apply.
4. When finished, select the **Schedule/Reschedule** button.

Interface Reject Manager

To view rejects for the Item Load (File) interface, navigate to the **Interface Reject Manager** frame. To locate the interface, select from the dropdown list or enter the name to find it quicker.

After you select the interface from the dropdown, Interface Parameters, Current Execution Schedule, and Schedule Details display.





After selected, the **Interface Statistics** i-frame displays.

1. Select the **Stat ID** for the run you want to view and the **Interface Rejects** i-frame displays.
    - You can scroll to the bottom and select **Show All** in the last row to view all run statistics. However, there is a limit on how much data M5 can display at one time.
2. If an **Error Msg No.** is available, you can hover over it with your mouse to display the message.
    - Example: IF500 – UNIT NUMBER does not exist.
3. After you have made the necessary corrections in M5, you can select the **Resubmit** box for each record you want to resubmit.
4. You can also delete any records you do not want to fix or resubmit.
5. Select **SAVE** to reprocess the rejected records.

2. Employee/Driver Load

The Employee/Driver Load Interface accepts and processes employee/driver information into Employee/Driver Main. This functionality saves organizations the work of manually keying in a large amount of data.

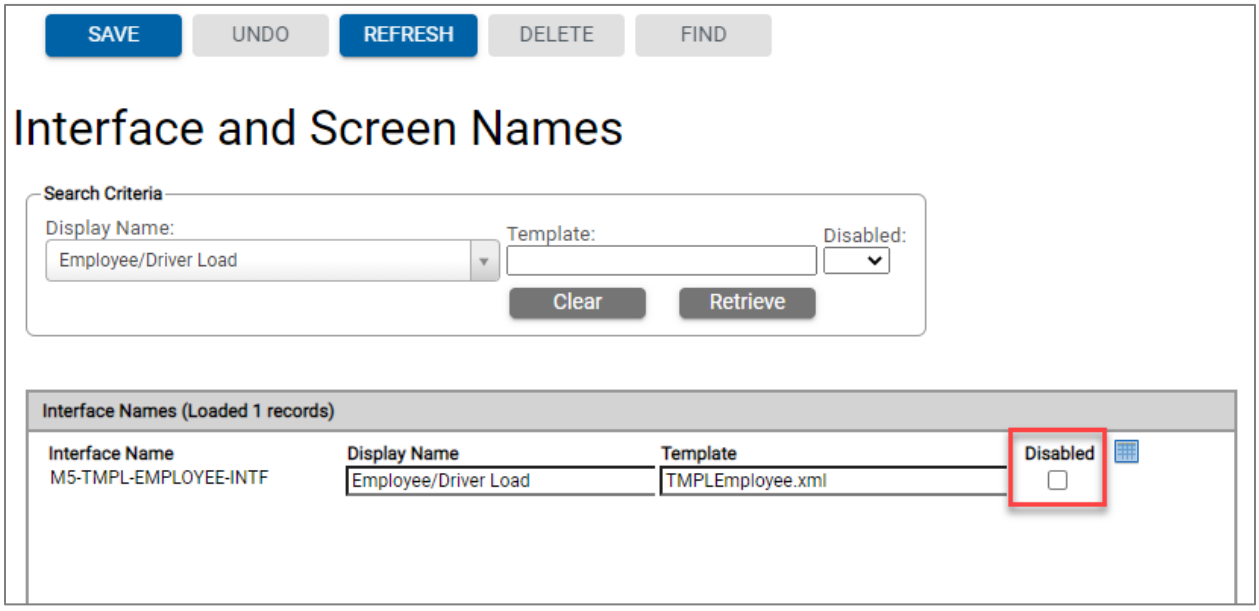
The interface performs the following functions:

- Creates new employee records in M5.
- Updates existing employee records in M5.
- Inserts fuel card information, terminate employee, and disable that card depending on status sent.

This interface is available to licensed clients only. Please contact AssetWorks Customer Support (1-610-225-8300, M5Support@Assetworks.com) or your project manager for more details on purchasing.

Interface and Screen Names

Before you can run the interface, you must make sure the interface is enabled for use.



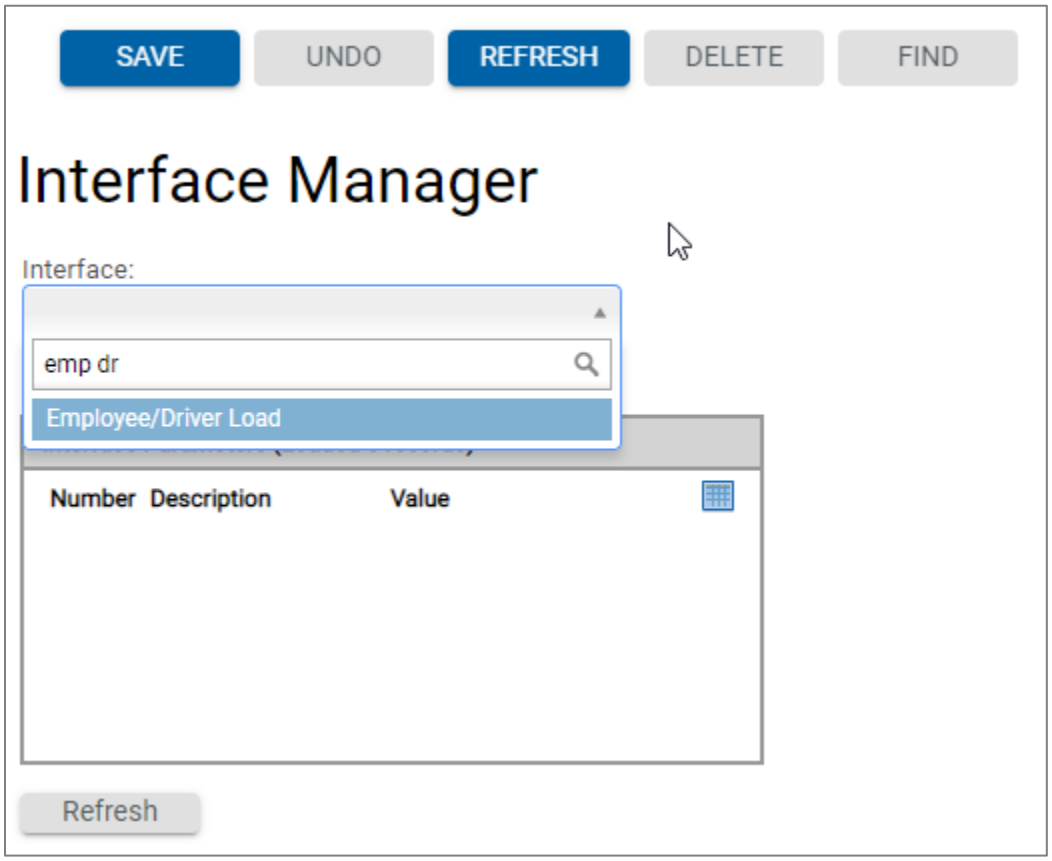
To verify:

1. Navigate to the **Interface and Screen Names** frame.
2. Scroll the list until you find: **M5-TMPL-EMPLOYEE-INTF** on the list. Alternatively, you can search for the interface in the **Display Name** dropdown and select the **Retrieve** button.
3. Make sure the **Disabled** checkbox is cleared.
4. If it is selected and you want to run the interface, clear the checkbox and select **SAVE**.

Interface Manager

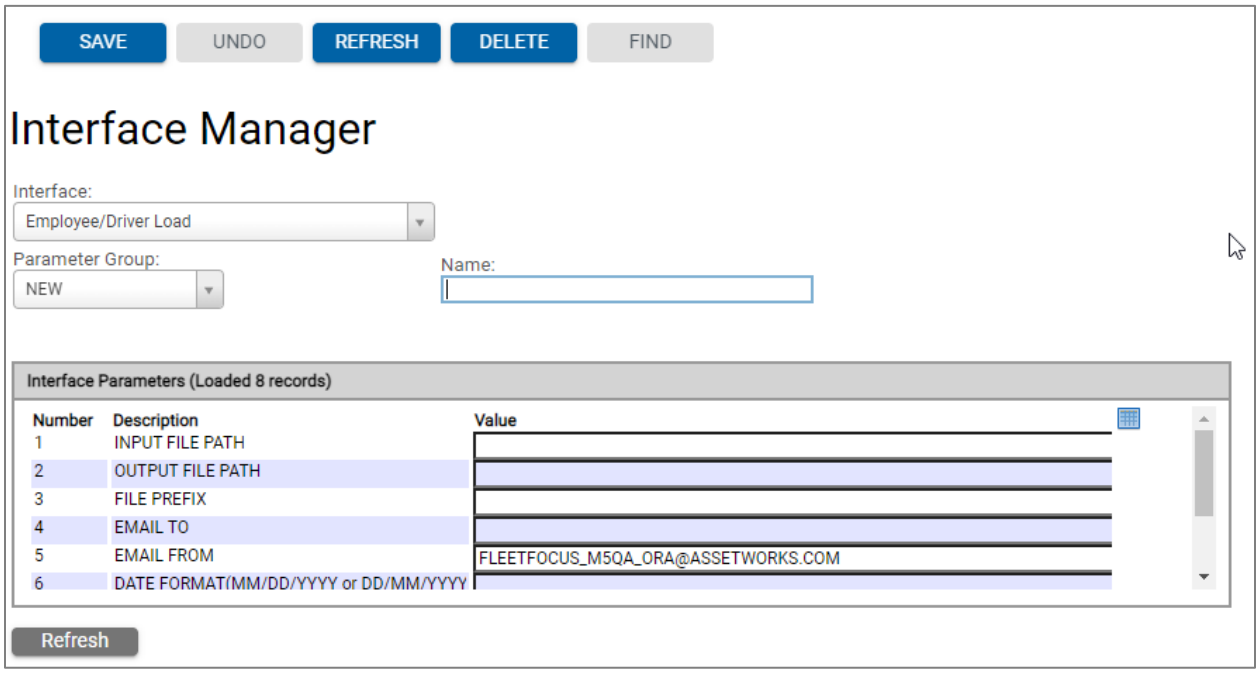
After verifying that the interface is enabled for use, navigate to the **Interface Manager** frame. To locate the interface, select from the dropdown list or enter the name.

After you select the interface from the dropdown, Interface Parameters, Current Execution Schedule, and Schedule Details display.



- You can select an existing **Parameter Group** from the dropdown.
- If this is your first time using the interface, the only option will be NEW. You can use this option to create and save a new parameter group for future use.
- To create a new group, select NEW from the dropdown, enter a name in the **Name** field, define parameter values (explanations below), and select the **SAVE** button.
- You can also run the interface without saving your parameters.

Interface Parameters



Interface Parameter Explanations

Parameter Name	Description	Required (Y/N)
INPUT FILE PATH	File path where the input file will be found by the interface program. Note: This path refers to the C: drive on the batch server. The directory name should not end with a "\", and can either be a mapped drive (C:, Q:, etc.) or with a \\server name\share\directory format. The interface will process any files found in this directory with a .csv extension.	Y

Parameter Name	Description	Required (Y/N)
OUTPUT FILE PATH	File path where the file will be moved upon completion of the interface. Note: This path refers to the C: drive on the batch server. The directory name should not end with a "\", and can either be a mapped drive (C:, Q:, etc.) or with a \\server name\share\directory format. The file is renamed with the date and time. For example, a file named WODATA.csv will be renamed as WODATAyyyymmddhhmmss.csv where yyyymmdd represents year/month/day and hhmmss represents hour/minutes/seconds.	Y
FILE PREFIX	This is an optional parameter that allows you to specify a part of the file name that will be added to the beginning of each processed file as a prefix.	N
EMAIL TO	User/Account to whom any email updates will be sent about the interface run. If you need multiple emails to receive these notifications, it is recommended to create a distribution group on the mail server that consists of those email addresses. Completion emails will include a count of good and bad records. The email will also include a list of files processed by the interface run.	Y
EMAIL FROM	User/Account from whom the email originates - default will be determined by the M5 Parameter values **FROM_EMAIL_NAME** and **CE_EMAIL_DOMAIN.** If this parameter is set to INTERFACE@ASSETWORKS.COM or left blank, the default option above will be used to construct the email address. If the parameter contains any other value, that entry will be used as the EMAIL FROM address.	N
DATE FORMAT (MM/DD/YYY or DD/MM/YYYY)	This parameter allows you to determine which of the two formats the incoming date will be in. If left blank, the default is MM/DD/YYY.	N
CREATE TEMP FUEL CARDS (Y/N)	If set to Y, temporary fuel cards will be created for new employee.	N

Sample Data

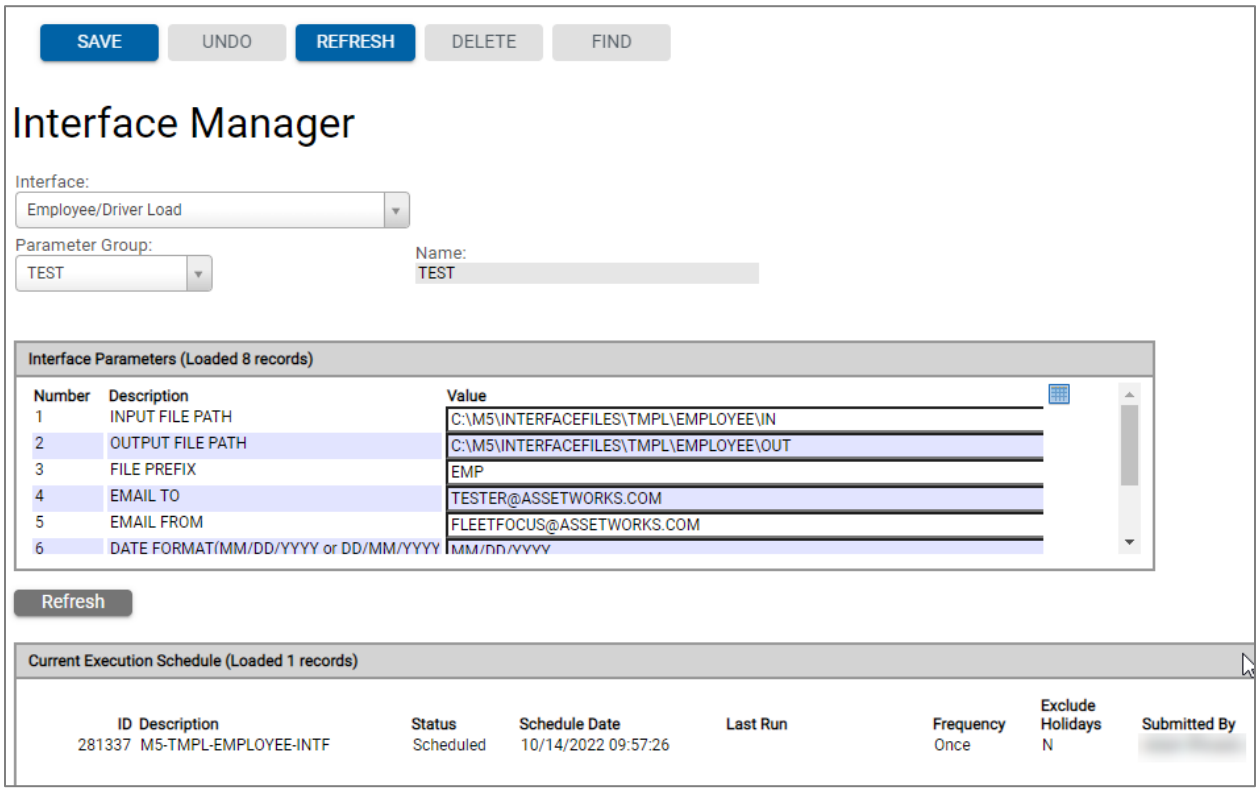
The following is a list of sample data that illustrates what the vendor data would look like within the .csv input file to be processed by the interface.

- There is a File Data table at the end of this document that you can reference to see more information about these fields like position, header value, definition, tables/columns, data type/size, description, processing logic, and whether it is a required field.

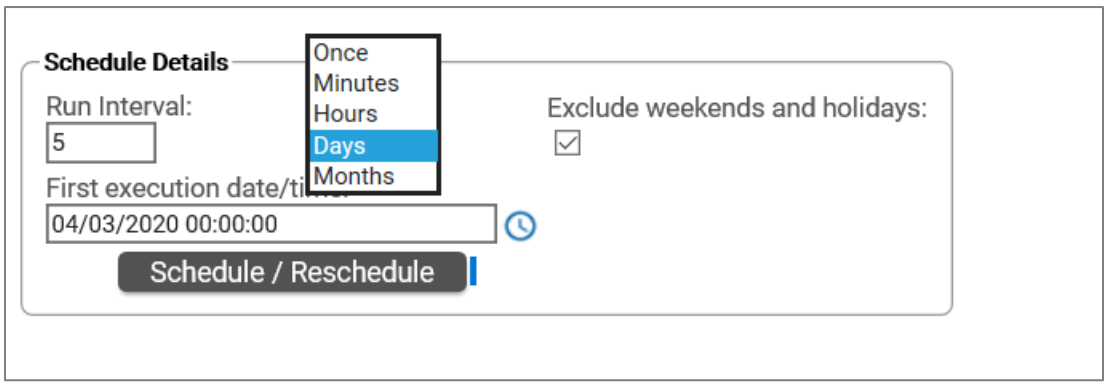
```
TMPL235,TMPL235 Name,A,,JOB
TITLE,1,2,05/02/2019,Y,Y,00045,Y,Y,Y,Y,Y,06/01/2019,555-729-
4122,fleet.org@assetworks.com,1234,,,,,,,,,,,INVALID JOB TITLE -
VALIDATED,JO225,FM,0010,JWVEN1,777,302,1,10,TMPL225DRIVER,LIC1,06/01/2020,Y,A
,RG,,,
```

Current Execution Schedule

This i-frame displays the current execution schedule for this interface. Current and previously scheduled runs display the ID, Description, Status, Scheduled Date, Last Run Date, Frequency, Exclude Holidays, Submitted By and Run Desc fields.



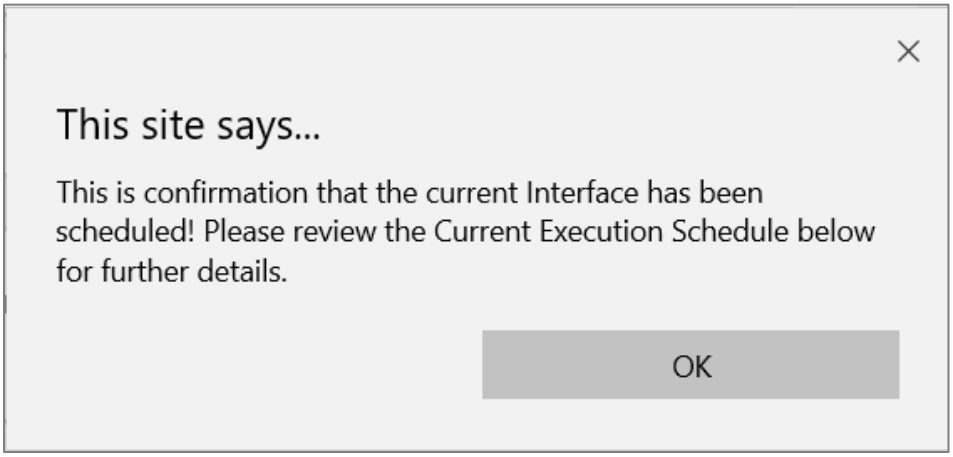
Schedule Details



To schedule the interface, enter schedule details.

1. Select the run interval (Once, Minutes, Hours, Days, Months).
    - If only running one time, currently, you can select **Once**, then select the **Schedule/Reschedule** button.
    - If you select Minutes, Hours, Days, or Months, enter a value for the interval in the **Run Interval** field that displays after selection is made.
2. If you would like to exclude weekends and holidays from the run, select the **Exclude Weekends and Holidays** checkbox.
3. Enter a **First Execution Date/Time** from which the run interval value should apply.
4. When finished, select the **Schedule/Reschedule** button.

You will receive the following message:



The scheduled run appears on the **Current Execution** i-frame. It can also be viewed on the **System Run List of Jobs** frame.

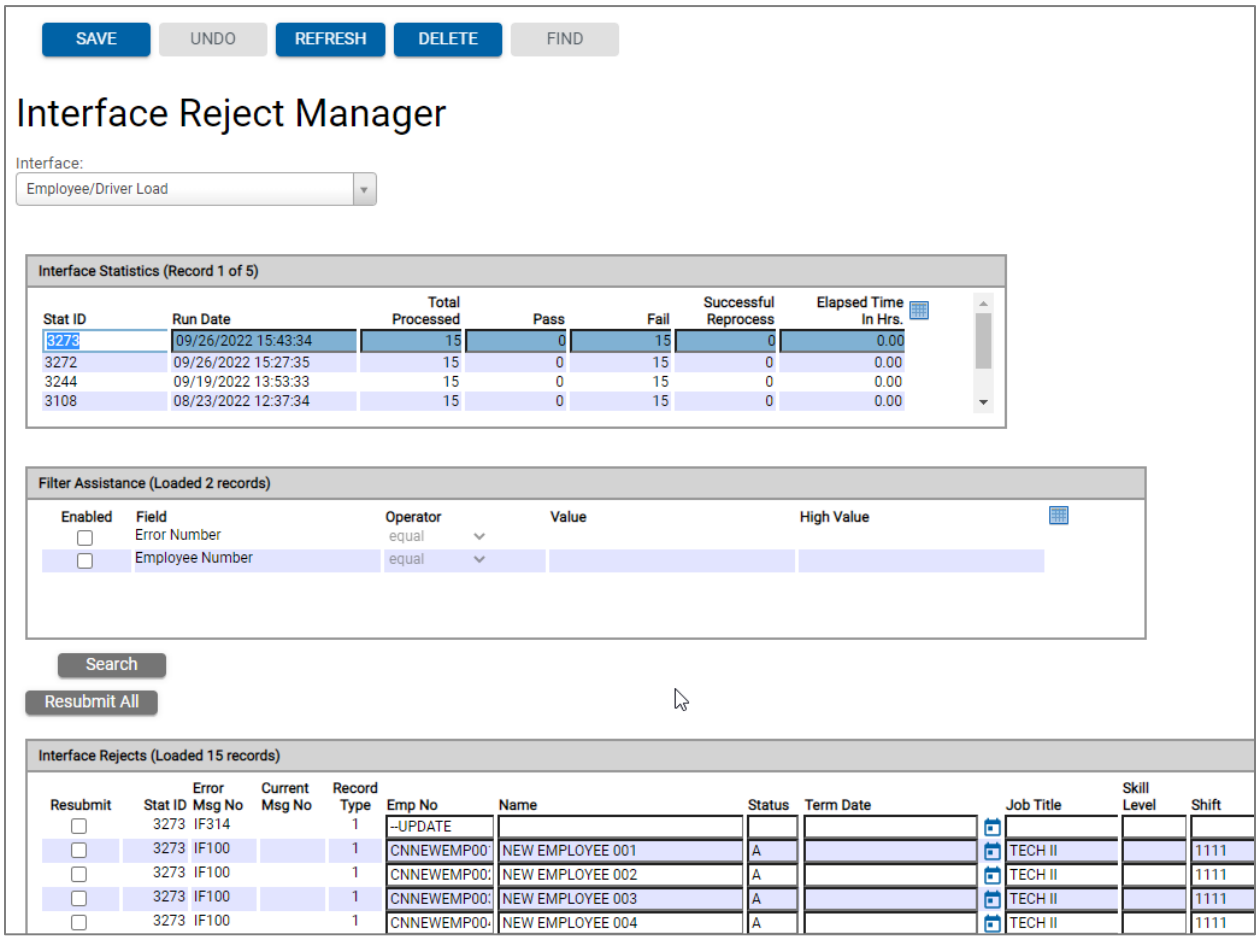
To view interface rejects, refer to the **Interface Reject Manager** frame.

Interface Reject Manager

To view rejects for the Employee/Driver Load interface, navigate to the **Interface Reject Manager** frame.

To locate the interface, select from the dropdown list or enter the name.

After you select the interface from the dropdown, Interface Parameters, Current Execution Schedule, and Schedule Details display.



After selected, the **Interface Statistics** i-frame displays.

1. Select the **Stat ID** for the run you want to view, the **Interface Rejects** i-frame displays.
    - You can scroll to the bottom and select **Show All** in the last row to view all run statistics. However, there is a limit on how much data M5 can display at one time.
2. If an **Error Msg No.** is available, you can hover over it with your mouse to display the message.

3. After you have made the necessary corrections in M5, you can select the **Resubmit** checkbox for each record you want to resubmit.
4. You can delete any records you do not want to fix or resubmit.
5. Select **SAVE** to reprocess the rejected records.

Error Processing

If a transaction record fails to process the data transaction data (along with the error message) will be passed to the common FleetFocus M5 interface reject infrastructure.

The common FleetFocus M5 interface reject infrastructure includes interface statistic information (how many records processed, how may records failed, how many records were reprocessed, or how long did the interface run) as well as rejected transactions for each interface execution cycle.

Employee/Driver Load

Position	Definition	Length	Tables/ Columns	Description	Logic Applied	Required
1	Employee Number	A11	emp_main.emp_no	Unique Employee Number	If employee number does not exist, then add new employee; else the employee number must be a valid M5 employee number and look for any changes.	
2	Name	A30	emp_main.name	Employe Name	If the employee already exists, check to see if the employee name has changed, and if so, change accordingly.	
3	Status	Char1	emp_main.status	Status	Valid values are I, A, T and are required in the file. I = Inactive(start date not required) A = Active (if start date not provided use current run date) T = Not Employed (Termination date required)	Y
4	Emp Termination Date	Date	emp_main.term_dt		If provided and an existing employee, change M5 status to Not employed. Required if Status is T.	
5	Title	A30	emp_main.job_title		Not required. If System Flag 5441 is Y and is valued, the value must be a valid M5 Job Title.	FL
6	Skill Level	N5	emp_main.skill_level		Not required; however, if the employee already exists and if this has changed, update accordingly.	N

Position	Definition	Length	Tables/ Columns	Description	Logic Applied	Required
7	Shift Code	N5	emp_main.shift_code		Must be a valid M5 shift. Only required if System Flag 1061 is Y. If the employee already exists, look to see if the shift has changed, and if so, update accordingly.	FL
8	Effective Date	Date	emp_main.shift_eff_dt		Only required if System Flag 1061 is Y. Default to the Hire Date if this is a new employee. If updating the shift on an existing employee, default this to the date of the interface run.	FL
9	Authorized to Charge Time	Char1	emp_main.chg_time_wo_fl		Not required. Valid values are Y, N or null. Y is only valid if a Valid Shift code is entered, regardless of System Flag 1061's setting. If user enters N it will be converted to null when saved.	N
10	Use Payroll Rates	Char1	emp_main.use_payroll_rate_fl		Not required. Valid values are Y, N or null. N will be converted to null when saved.	N
11	Markup Scheme	A10	emp_main.markup_scheme		Not required; however, if there is a value in this field, then it must be a valid M5 markup scheme.	N
12	Allow Part Requests to Unit	Char1	emp_main.req_part_un_fl		Not required. Valid values are Y, N or null. N will be converted to null when saved.	N
13	Allow Part Requests to Work Order	Char1	emp_main.req_part_wo_fl		Not required. Valid values are Y, N or null. N will be converted to null when saved.	N
14	Allow Part Requests to Indirect Acct	Char1	emp_main.req_part_ia_fl		Not required. Valid values are Y, N or null. N will be converted to null when saved.	N

Position	Definition	Length	Tables/ Columns	Description	Logic Applied	Required
15	Allow Part Requests to Direct Acct	Char1	emp_main.req_part_da_fl		Not required. Valid values are Y, N or null. N will be converted to null when saved.	N
16	Allow Part Requests to Department	Char1	emp_main.req_part_de_fl		Not required. Valid values are Y, N or null. N will be converted to null when saved.	N
17	Start Date	date	emp_main.start_dt		If this is a new employee (status is A), then make this their hire date; otherwise, ignore. If blank on new employee (and status = A), default to date of run. If value is entered, must be a valid date.	N
18	Phone	A15	emp_main.phone		Not required. If the employee already exists, check to see if the phone number has changed, and if so, change accordingly. Must be a valid phone number.	N
19	Email	A128	emp_main.email_address		Not required. If the employee already exists, check to see if the email address has changed, and if so, change accordingly. If System Flag 5249 is Y, values are validated. If System Flag 5410 is Y, append default domain, otherwise domain is required.	N
20	PIN	N6	emp_main.pin	Employee PIN number	Not required. Must be numeric.	N
21	Supervisor	Char1	emp_main.superv_fl		Not required. Valid values are Y, N or null. N will be converted to null when saved.	N

Position	Definition	Length	Tables/ Columns	Description	Logic Applied	Required
22	Department Contact	Char1	emp_main.dept_contact_fl		Not required. Valid values are Y, N or null. N will be converted to null when saved.	N
23	Driver	Char1	emp_main.driver_fl		Not required. Valid values are Y, N or null. If Y, Driver Status and Driver Type are required and validated values.	N
24	Add Jobs on Labor	Char1	emp_main.add_new_job_fl		Not required. Valid values are Y, N or null. N will be converted to null when saved.	N
25	MP Approval Required	Char1	emp_main.mp_approval_fl		Not required. Valid values are Y, N or null. N will be converted to null when saved.	N
26	Temporary	Char1	emp_main.temp_fl		Not required. Valid values are Y, N or null. N will be converted to null when saved.	N
27	Contractor	Char1	emp_main.contractor_fl		Not required. Valid values are Y or null. If Y, Vendor must be entered and valid.	N
28	Exempt	Char1	emp_main.exempt_fl		Not required. Valid values are Y, N or null. N will be converted to null when saved.	N
29	Technician	Char1	emp_main.technician_fl		Not required. Valid values are Y, N or null. N will be converted to null when saved.	N
30	Time Keeper	Char1	emp_main.timekeep_fl		Not required. Valid values are Y, N or null. N will be converted to null when saved.	N
31	Inv Emp	Char1	emp_main.inv_fl		Not required. Valid values are Y, N or null. N will be converted to null when saved.	N

Position	Definition	Length	Tables/ Columns	Description	Logic Applied	Required
32	Notes	4000 bytes	emp_main.notes		Not required.	N
33	Supervisor ID	N10	emp_main.super_id		Not required. If creating a new employee and a value is in this column, this must be a valid M5 employee that has been designated as a supervisor. If the employee already exists, check to see if the supervisor number has changed, and if so, change accordingly.	N
34	Home Location	A6	emp_main.location		Required and must be a valid M5 location; else reject.	Y
35	Department	A30	unit_dept_comp_main.unit_no		Not required; however, if there is a value, then it must be a valid M5 department; else reject. **Note:** LOV uses dept_no from view_dept_main_item, where status = A, however if using Unit_dept_comp_main. Unit_no, unit_type must = D and status must = A.	N
36	Vendor	A12	vendor.vendor_no		Must be a valid M5 vendor number. Required if the CONTRACTOR_FL is Y.	FL
37	Union Code	A4	emp_main.union_no		Not required; however, if there is a value, it must be a valid M5 union. Value is required when System Flag 5325 is Y and must always be a valid Union in M5.	FL
38	Time Type	A3	emp_main.time_type		Not required; however, if there is a value, it must be a valid M5 time type.	N

Position	Definition	Length	Tables/ Columns	Description	Logic Applied	Required
39	Primary Pay Class	A6	emp_main.pay_class		Not required; however, if there is a value, it must be a valid M5 pay class.	
40	Primary Pay Step	A2	emp_main.pay_step		Not required; however, if there is a value, it must be a valid M5 pay step.	
41	Driver Number	A128	emp_main.driver_no		Not required. Value must be unique.	
42	License No	A30	emp_main.driver_license_no		Not required.	
43	License Expiry	Date	emp_main.license_expire_dt		Not required. If entered, must be a valid date.	
44	Tax Form on File	Char1	emp_main.tax_form_onfile_fl		Not required. Valid values are Y, N, or null.	
45	Driver Status	Char1	emp_main_main.driver_status		Required if the driver flag is set to Y. Must be a valid M5 driver status; else reject.	
46	Driver Type	A6	emp_main.driver_type		Required if the driver flag is Y. Must be a valid M5 driver type; else reject.	
47	Card No	A16	F_card.card_no; Emp_main.card_no		Not required. Use the value in the file, however, if no value is entered and the Create Employee Fuel Card parameter is Y, follow the rules listed in the New Employee section (only applies to new employees). If reinstating a previously terminated employee, and the value in the file is the same as a previously disabled Fuel Card, reinstate the fuel card (set Disabled = No).	

Position	Definition	Length	Tables/ Columns	Description	Logic Applied	Required
48	Effective Date	Date	F_card.eff_dt		Only required if a fuel card number is populated in the file and is being initially entered. Otherwise, ignore.	

3. Vendor Load

The Vendor Load Interface accepts and processes vendor information into the Vendor Main frame. This functionality saves organizations the work of manually keying in a large amount of data.

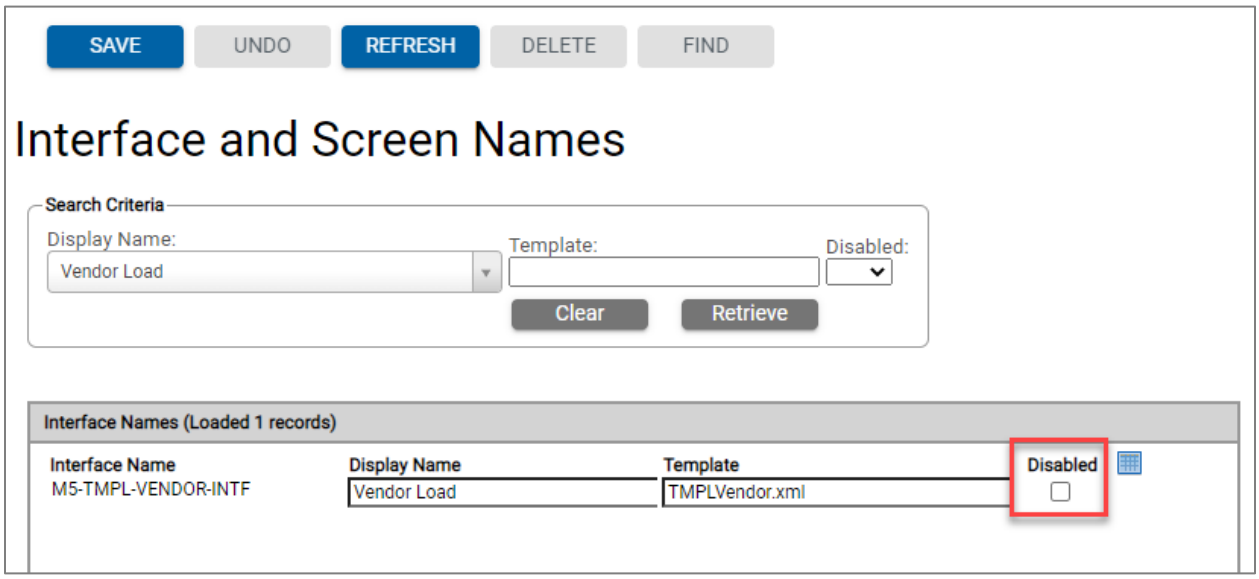
The interface performs the following functions:

- Creates vendor records in M5.
- Updates existing vendor records in M5.

This interface is available to licensed clients only. Please contact AssetWorks Customer Support (1-610-225-8300, M5Support@Assetworks.com) or your project manager for more details on purchasing.

Interface and Screen Names

Before you can run the interface, you must make sure the interface is enabled for use.



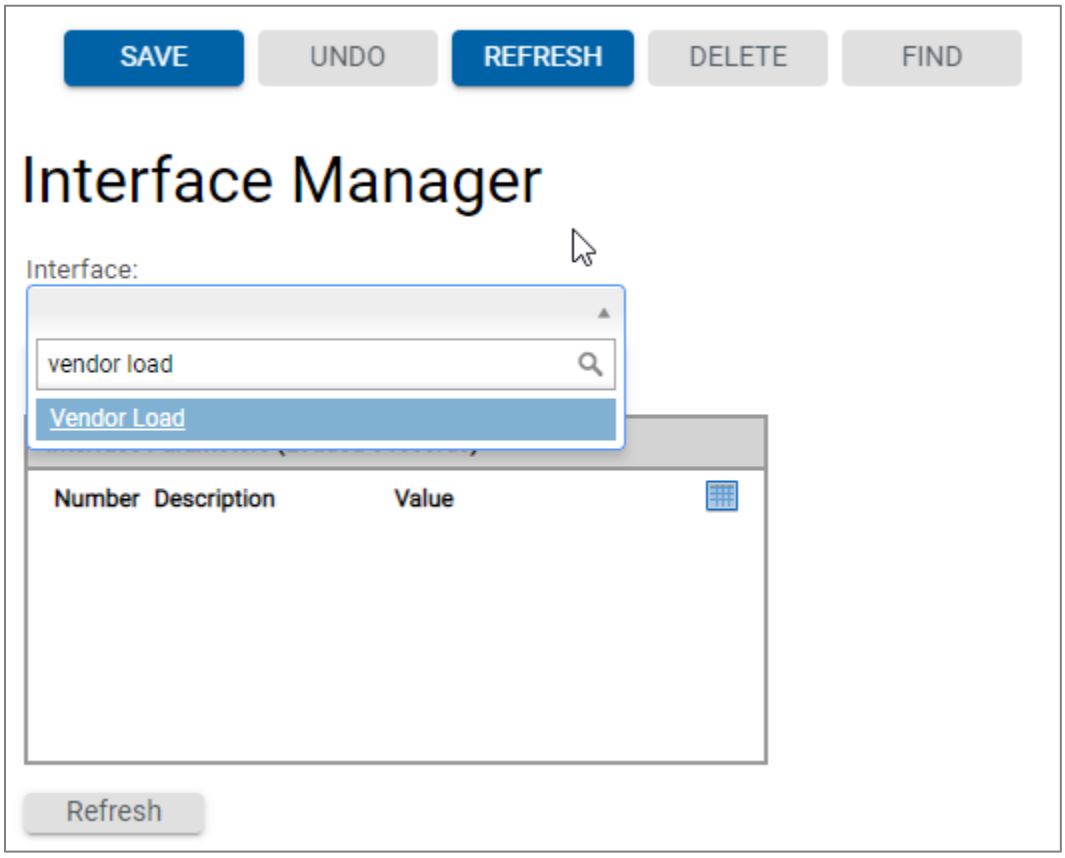
To verify:

1. Navigate to the **Interface and Screen Names** frame.
2. Scroll the list until you find: **M5-TMPL-VENDOR-INTF** on the list. Alternatively, you can search for the interface in the **Display Name** dropdown and select the **Retrieve** button.
3. Make sure the **Disabled** checkbox is cleared.
4. If it is selected and you want to run the interface, clear the checkbox and select **SAVE**.

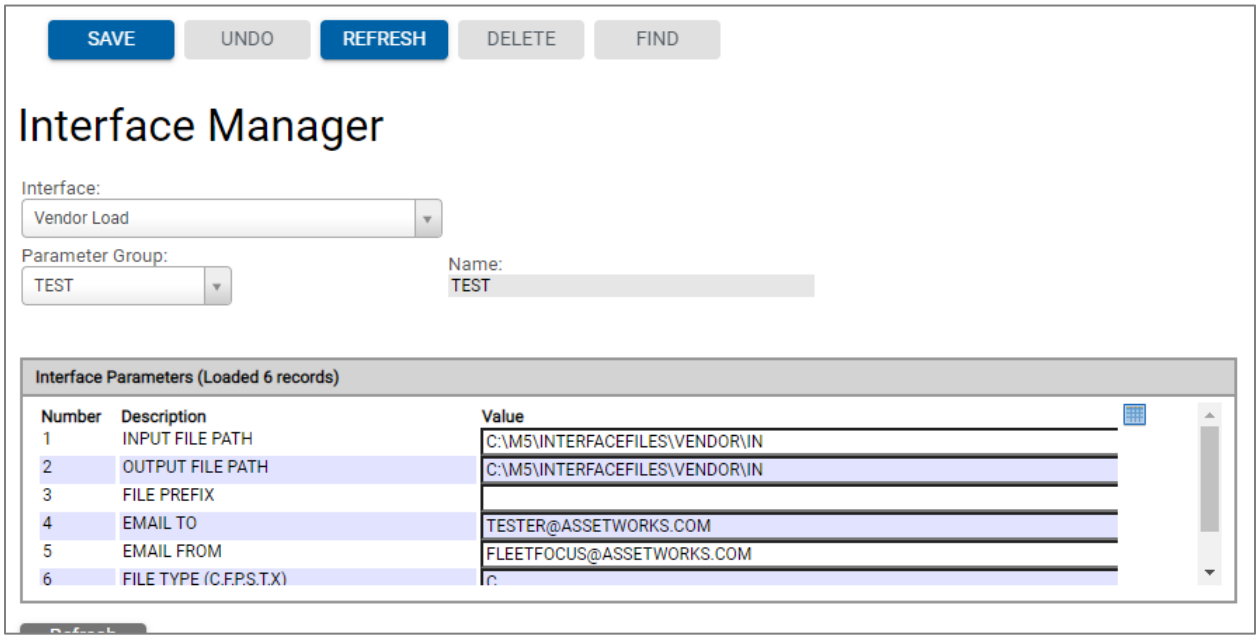
Interface Manager

After verifying that the interface is enabled for use, navigate to the **Interface Manager** frame. To locate the interface, select from the dropdown list or enter the name.

After you select the interface from the dropdown, the Interface Parameters, Current Execution Schedule, and Schedule Details display.



Interface Parameters



Interface Parameter Explanations

Parameter Name	Description	Required (Y/N)
INPUT FILE PATH	File path where the input file will be found by the interface program. Note: This path refers to the C: drive on the batch server. The directory name should not end with a "\", and can either be a mapped drive (C:, Q:, etc.) or with a \\server name\share\directory format. The interface will process any files found in this directory with a .csv extension.	Y
OUTPUT FILE PATH	File path where the file will be moved upon completion of the interface. Note: This path refers to the C: drive on the batch server. The directory name should not end with a "\", and can either be a mapped drive (C:, Q:, etc.) or with a \\server name\share\directory format. The file is renamed with the date and time. For example, a file named WODATA.csv will be renamed as WODATAyyyymmddhhmmss.csv where yyyymmdd represents year/month/day and hhmmss represents hour/minutes/seconds.	Y

Parameter Name	Description	Required (Y/N)
FILE PREFIX	This is an optional parameter that allows you to specify a part of the file name that will be added to the beginning of each processed file as a prefix.	N
EMAIL TO	User/Account to whom any email updates will be sent upon about the interface run. If you need multiple emails to receive these notifications, it is recommended to create a distribution group on the mail server that consists of those email addresses. Completion emails will include a count of good and bad records. The email will also include a list of files processed by the interface run.	Y
EMAIL FROM	User/Account from whom the email originates - default will be determined by the M5 Parameter values **FROM_EMAIL_NAME** and **CE_EMAIL_DOMAIN.** If this parameter is set to INTERFACE@ASSETWORKS.COM or left blank, the default option above will be used to construct the email address. If the parameter contains any other value, that entry will be used as the EMAIL FROM address.	N

Sample Data

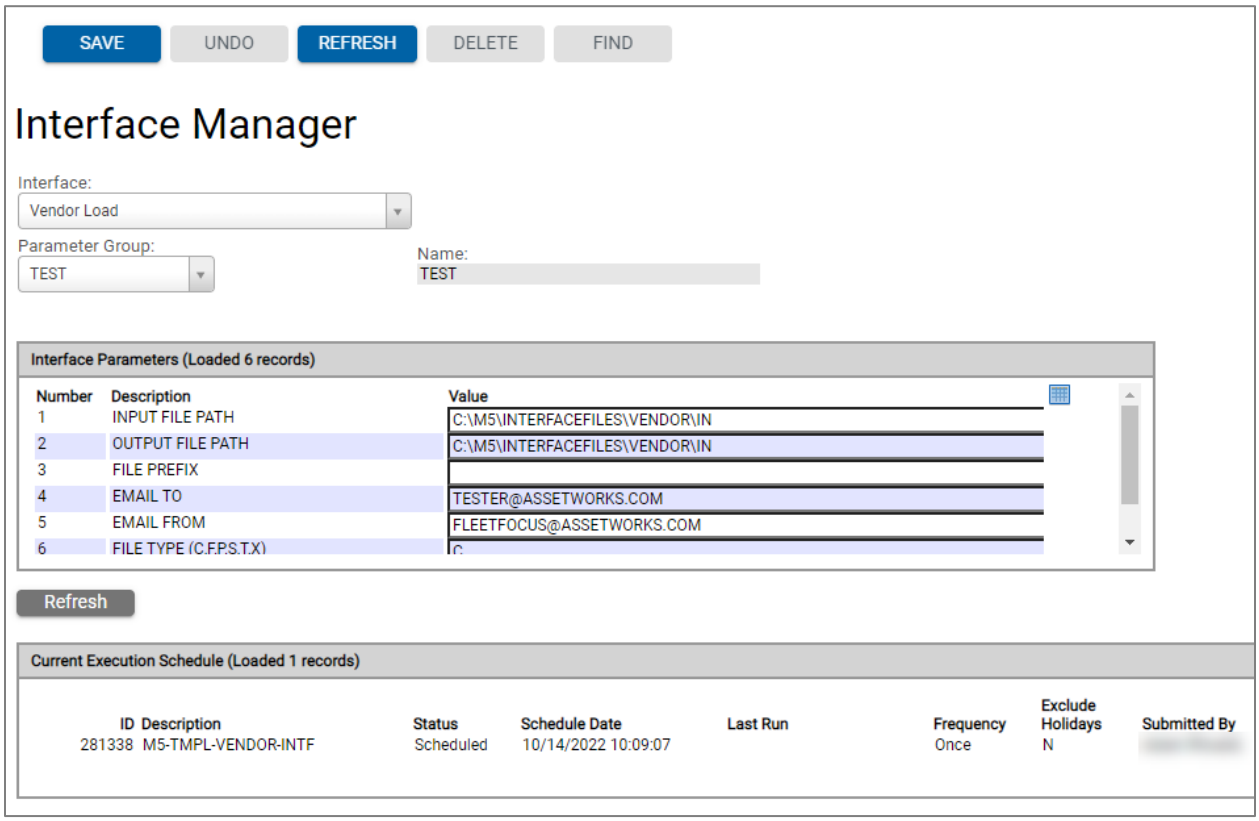
The following is a list of sample data that illustrates what the vendor data would look like within the .csv input file to be processed by the interface.

- The first example is just the M5 database field names. The next example shows what it would look like with sample data that corresponds to those fields.
- There is a File Data table at the end of this document that you can reference to see more information about these fields like position, header value, definition, tables/columns, data type/size, description, processing logic, and whether it is a required field.

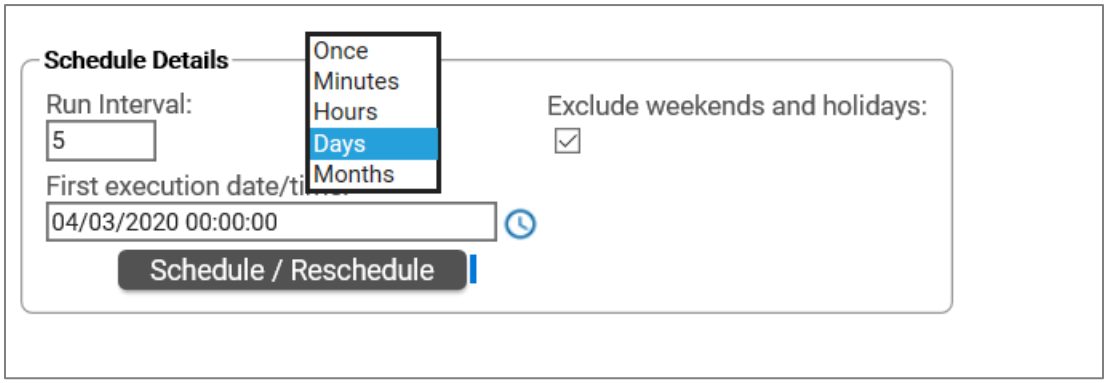
```
Vendor Number, Name – Short, Disable Fl, Name – Long, Address 1, Address 2,
City, State, Zip/Postal Code, Country, Locale, Region, County, Contact,
Contact Phone, Contact Extension, Parts Contact, Parts Contact Phone, Parts,
Contact Phone Extension, Service Contact, Service Contact Phone, Service
Contact Phone Extension, Mobile Phone, Email Address, Web Address, Tax
Scheme, Bill Same As Email, Bill Long Name, Bill Address 1, Bill Address 2,
Bill State, Bill Zip/Postal Code, Bill City, Bill Country, Bill Region, Bill
County, Bill Contact, Bill Contact Phone, Bill Contact Phone Extension, Bill
Email Address, Notes

JDCTest1,Test Vendor 1,N,Test Vendor 1,123 Sesame St,,New York,NY,10001,1,EN-
US,,Manhattan,John Doe,5555551212,123,Jim Doe,5555551212,321,Joe
Doe,5555551212,231,5555551212,johndoe@assetworks.com,http://www.assetworks.co
m,,,Test Vendor 1,123 Sesame St,,NY,10001,New York,1,,Manhattan,Jane
Doe,5555551212,124,janedoe@assetworks.com,This is a test note.
```

Current Execution Schedule

This i-frame displays the current execution schedule for this interface. Current and previously scheduled runs display the ID, Description, Status, Scheduled Date, Last Run Date, Frequency, Exclude Holidays, Submitted By and Run Desc fields.



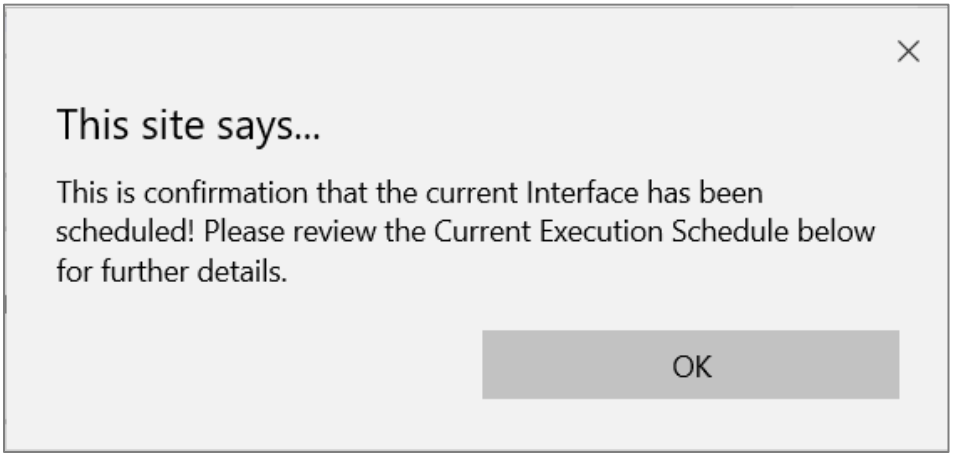
Schedule Details



To schedule the interface, enter schedule details.

1. Select the run interval (Once, Minutes, Hours, Days, Months).
    - If only running one time, currently, you can select **Once**, then select the **Schedule/Reschedule** button.
    - If you select Minutes, Hours, Days, or Months, enter a value for the interval in the **Run Interval** field that displays after selection is made.
2. If you would like to exclude weekends and holidays from the run, select the **Exclude Weekends and Holidays** checkbox.
3. Enter a **First Execution Date/Time** from which the run interval value should apply.
4. When finished, select the **Schedule/Reschedule** button.

You will receive the following message:



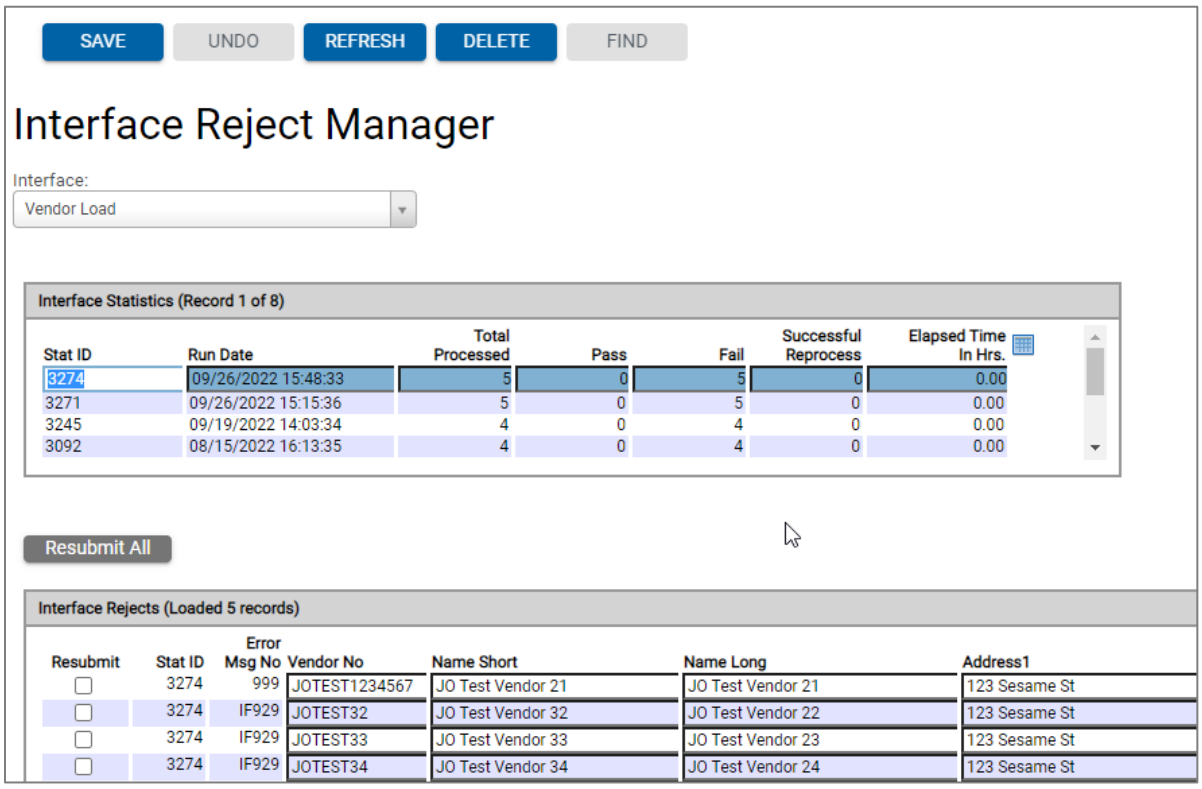
The scheduled run appears on the **Current Execution** i-frame above. It can also be viewed on the **System Run List of Jobs** frame.

To view interface rejects, refer to the **Interface Reject Manager** frame.

Interface Reject Manager

To view rejects for the Vendor Load interface, navigate to the **Interface Reject Manager** frame.

To locate the interface, select from the dropdown list or enter the name.



After selected, the **Interface Statistics** i-frame displays.

1. Select the **Stat ID** for the run you want to view, the **Interface Rejects** i-frame displays.
    - You can scroll to the bottom and select **Show All** in the last row to view all run statistics. However, there is a limit on how much data M5 can display at one time.
2. If an **Error Msg No.** is available, you can hover over it with your mouse to display the message.
3. After you have made the necessary corrections in M5, you can select the **Resubmit** checkbox for each record you want to resubmit.
4. You can also delete any records you do not want to correct or resubmit.
5. Select **SAVE** to reprocess the rejected records.

Error Processing

If a transaction record fails to process, the data transaction data (along with the error message) will be passed to the common FleetFocus M5 interface reject infrastructure.

The common FleetFocus M5 interface reject infrastructure includes interface statistic information (how many records processed, how may records failed, how many records were reprocessed, or how long did the interface run) as well as rejected transactions for each interface execution cycle.

Additional Considerations

- If System Flag 5133 is set to Y, you must have a tax scheme on the vendor records being processed.
- Duplicate vendor numbers are not allowed.

Vendor Load

Position	Definition	Tables/ Columns	Data Type/ Size	Description	Logic Applied	Required
1	Vendor Number	VENDOR.VENDOR_NO	12	M5 Vendor Number	Create if this number does not already exist, data will be uppercased.	Y
2	Name - Short	VENDOR.NAME_SHORT	20	Vendor Name short	If blank, use Name - Long, truncated to 20 chars, otherwise truncate data to 20 chars.	Y
3	Disable Fl	VENDOR.DISABLE_FL	1	Disabled Fl	Y or Blank. If user enters N, this will be converted to blank.	Y
4	Name - Long	VENDOR.NAME_LONG	40	Vendor Name Long	Free form	N
5	Address 1	VENDOR.ADDRESS1	40	Address 1	Free form	N
6	Address 2	VENDOR.ADDRESS2	40	Address 2	Free form	N
7	City	VENDOR.CITY	30	City	Free form	N
8	State	VENDOR.STATE	30	State	Must be a valid M5 state and Country combination.	Y
9	Zip/Postal Code	VENDOR.ZIP_CODE	12		Free form	N
10	Country	VENDOR.COUNTRY	3	Country code	If blank, use default country code from System Flag 5007. Country description will be derived from COUNTRY_CODE.	FL

Position	Definition	Tables/ Columns	Data Type/ Size	Description	Logic Applied	Required
11	Locale	VENDOR.LOCALE_ID	50	Locale Id	If blank, use default LOCALE_ID from M5_PARAMS otherwise must be a valid LOCALE_ID.	N
12	Region	VENDOR.REGION	30	Region	Free form	N
13	County	VENDOR.COUNTY	30	County	Free form	N
14	Contact	VENDOR.CONTACT	20	Contact	Free form	N
15	Contact Phone	VENDOR.PHONE	15	Phone number	Numeric, no decimal places, do not use delimeters.	N
16	Contact Extension	VENDOR.PHONE_EXT	10	Extension	Numeric, no decimal places, do not use delimeters.	N
17	Parts Contact	VENDOR.PARTS_CONTACT	20	Parts Contact	Free form	N
18	Parts Contact Phone	VENDOR.PARTS_PHONE	15	Phone number	Numeric, no decimal places, do not use delimeters.	N
19	Parts Contact Phone Extension	VENDOR.PARTS_EXT	10	Extension	Numeric, no decimal places, do not use delimeters.	N
20	Service Contact	VENDOR.SERVICE_CONTACT	20	Service Contact	Free form	N
21	Service Contact Phone	VENDOR.SERVICE_PHONE	15	Phone number	Numeric, no decimal places, do not use delimeters.	N
22	Service Contact Phone Extension	VENDOR.SERVICE_EXT	10	Extension	Numeric, no decimal places, do not use delimeters.	N

Position	Definition	Tables/ Columns	Data Type/ Size	Description	Logic Applied	Required
23	Mobile Phone	VENDOR.CELL_PHONE	15	Vendor Mobile phone	Numeric, no decimal places, do not use delimeters.	N
24	Email Address	VENDOR.EMAIL_ADDRESS	128	Email address		N
25	Web Address	VENDOR.WEB_ADDRESS	256	Web site		N
26	Tax Scheme	VENDOR.TAX_SCHEME	10	Tax Scheme	If System Flag 5133 is 1, tax scheme is required. Must be a valid M5 Tax Scheme.	FL
27	Bill Same As Email	VENDOR.BILL_SAME_AS_MAIL	1	Flag to indicate if the billing address is the same as the mailing address.	Y or blank. If user enters N, this will be converted to blank.	N
28	Bill Long Name	VENDOR.BILL_NAME_LONG	40		If VENDOR.BILL_SAME_AS _MAIL = Y then ignore this value.	N
29	Bill Address 1	VENDOR.BILL_ADDRESS1	40		If VENDOR.BILL_SAME_AS _MAIL = Y then ignore this value.	N
30	Bill Address 2	VENDOR.BILL_ADDRESS2	40		If VENDOR.BILL_SAME_AS _MAIL = Y then ignore this value.	N
31	Bill State	VENDOR.BILL_STATE	30		If VENDOR.BILL_SAME_AS _MAIL = Y then ignore this value.	N

Position	Definition	Tables/ Columns	Data Type/ Size	Description	Logic Applied	Required
32	Bill Zip/Postal Code	VENDOR.BILL_ZIP_CODE	12		If VENDOR.BILL_SAME_AS _MAIL = Y then ignore this value.	N
33	Bill City	VENDOR.BILL_CITY	30		If VENDOR.BILL_SAME_AS _MAIL = Y then ignore this value.	N
34	Bill Country	VENDOR.BILL_COUNTRY	3		If VENDOR.BILL_SAME_AS _MAIL = Y then ignore this value.	N
35	Bill Region	VENDOR.BILL_REGION	30		If VENDOR.BILL_SAME_AS _MAIL = Y then ignore this value.	N
36	Bill County	VENDOR.BILL_COUNTY	30		If VENDOR.BILL_SAME_AS _MAIL = Y then ignore this value.	N
37	Bill Contact	VENDOR.BILL_CONTACT	20		If VENDOR.BILL_SAME_AS _MAIL = Y then ignore this value.	N
38	Bill Contact Phone	VENDOR.BILL_PHONE	15		If VENDOR.BILL_SAME_AS _MAIL = Y then ignore this value.	N
39	Bill Contact Phone Extension	VENDOR.BILL_EXT	10		If VENDOR.BILL_SAME_AS _MAIL = Y then ignore this value.	N
40	Bill Email Address	VENDOR.BILL_EMAIL_ADDRESS	128			N
41	Notes	VENDOR.NOTES	4000			N

4. Unit Meter Load

This Unit Meter Load interface allows you to update a large volume of unit meters (primary and secondary) as well as the meter dates by uploading a data file for processing by M5 rather than entering this information manually one unit at a time.

Implementation

The data required for this interface consists of these data elements:

- Unit Number
- Meter (the primary meter)
- Meter Date (the primary meter date)
- Meter 2
- Meter 2 Date

If both meters are sent, the comma delimited text file would look like this:

- Unit,meter,meter_date,meter2,meter2_date

If only the primary meter is sent:

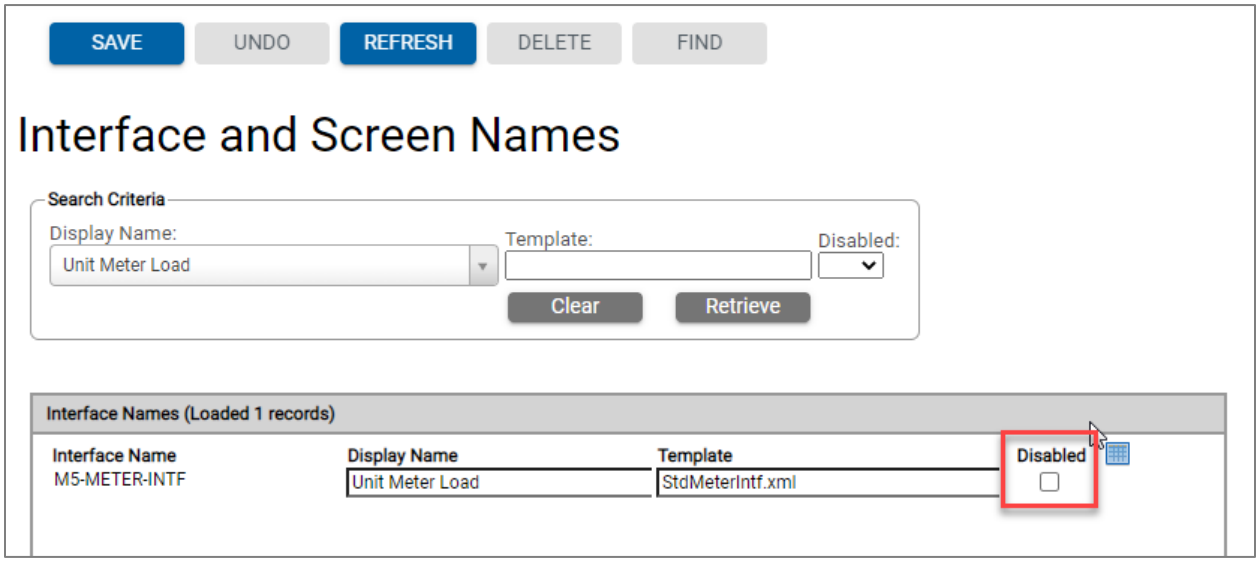
- Unit,meter1,meter1_date,,

If only meter two is sent:

- Unit,,,meter2,mter2_date

Interface and Screen Names

Before you can run the interface, you must make sure the interface is enabled for use.



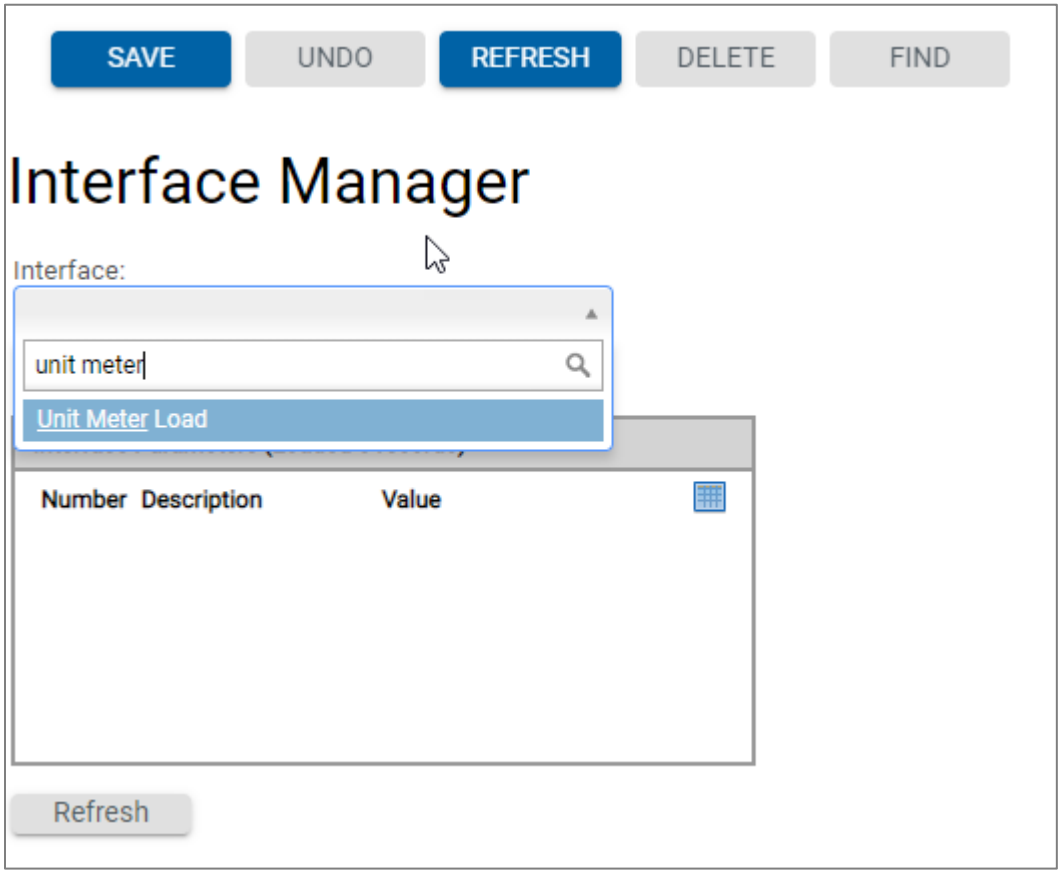
To verify:

1. Navigate to the Interface and Screen Names frame.
2. Scroll the list until you find: **M5-STD-METER-INTF** on the list.
3. Make sure the **Disabled** checkbox is cleared.
4. If it is selected and you want to run the interface, clear the checkbox and select **SAVE**.

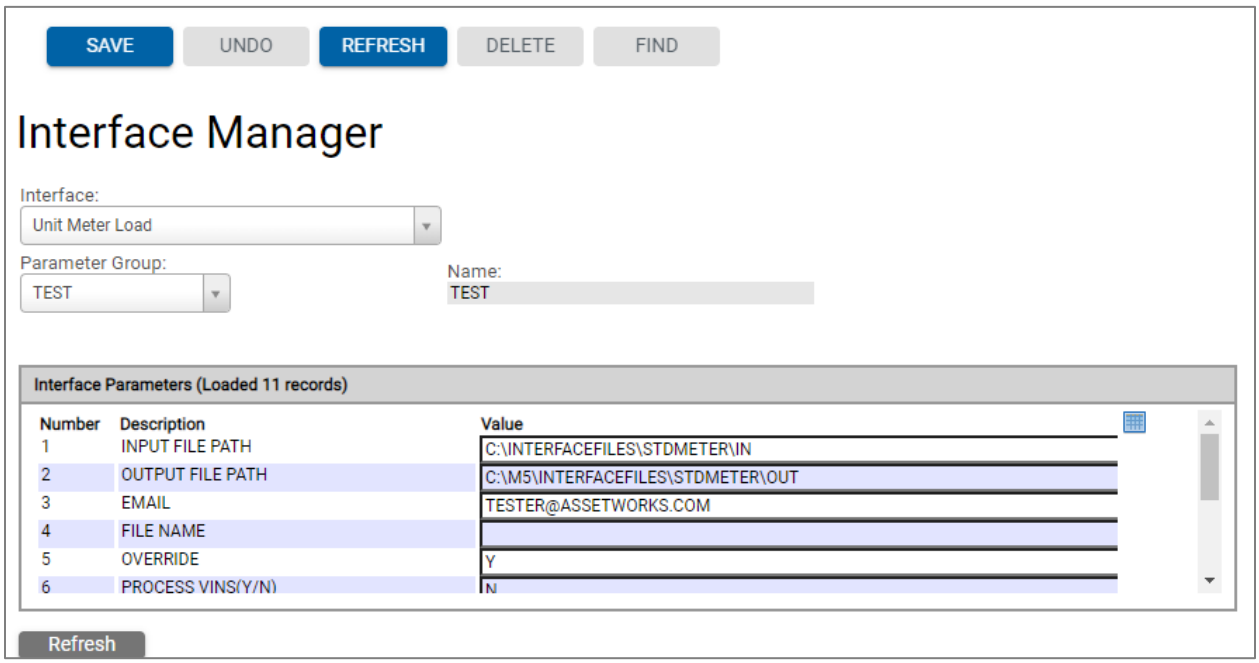
Interface Manager

After verifying that the interface is enabled for use, navigate to the **Interface Manager** frame. To locate the interface, select from the dropdown list or enter the name.

After you select the interface from the dropdown, Interface Parameters, Current Execution Schedule, and Schedule Details display.



Interface Parameters



- The most recent set of saved parameters load when the frame loads. Unlike some interface frames, you are not able to save different sets of parameters.
- To change any of the six values, enter the new information and select **SAVE**.

Interface Parameter Explanations

Parameter Name	Description	Required (Y/N)
INPUT FILE PATH	File path where the input file will be found. Note: This path refers to the C: drive on the batch server. The directory name should not end with a "\", and can either be a mapped drive (C:, Q:, etc.) or with a \\server name\share\directory format.	Y
OUTPUT FILE PATH	File path where the file will be moved upon completion of the interface. Note: This path refers to the C: drive on the batch server. The directory name should not end with a "\", and can either be a mapped drive (C:, Q:, etc.) or with a \\server name\share\directory format.	Y
EMAIL	Enter your email address. When the interface processes, you will receive a notification.	Y
OVERRIDE	Y/N indicates if you want to override meter readings.	N

Parameter Name	Description	Required (Y/N)
PROCESS VINS (Y/N)	When set to Y, this means to process the input file and interpret the unit number field as a VIN number and resolve it to a Unit Number. The interface can only do one or the other, not both. So, if this parameter is set to Y, it will only try to match to VIN numbers.	N
TIMEZONE	Set time zone for meter processing. Processing logic: • If this parameter is set, the interface will use the offset for the given time zone to adjust all date/times in the import file. • If the parameter is blank, then the interface will get the time zone of the unit's parking location. • If the unit does not have a parking location set, then it will get the unit's maintenance location. It will adjust the import date/time by that time zone's offset. • If the unit does not have a parking location or maintenance location, then it will not adjust the date/time and save it as is.	N
DATE FORMAT MM/DD/YYYY or DD/MM/YYYY	Date format parameter to support international date formatting.	N

The interface creates a program log file useful in case of program failure. By default, it will be in the M5\Interface\Logs directory.

File Data

- The data is contained in text file with the following layout.
- The data file will be pre-processed, data elements extracted and reformatted into an XML message which will then be sent to the interface.
- This allows you to use a variety of file formats.

Sample Data

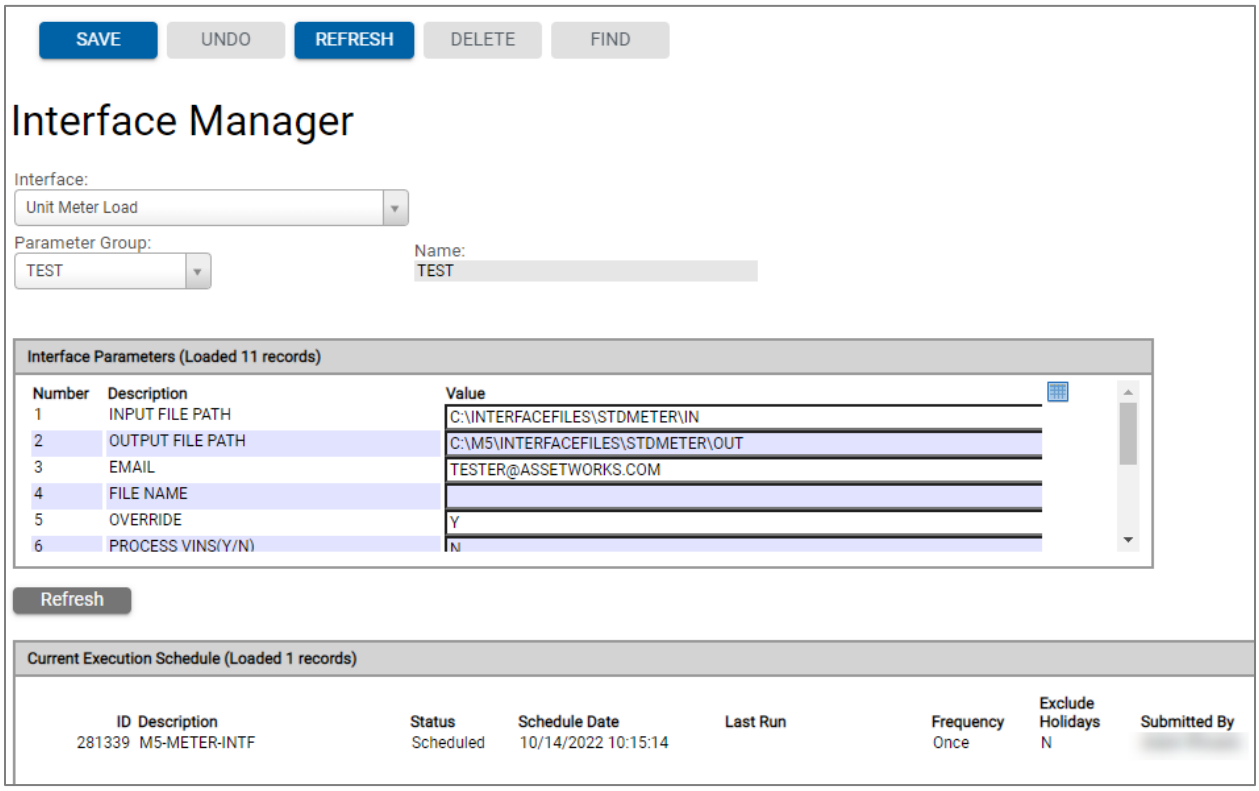
Column	Column Name	Type	Field	Processing Decisions
1	Vehicle Number	Varchar2 – 10	Unit_No	Must be a valid M5 unit number (if VIN parameter is set to Y, value in this field will be matched to unit's VIN number).
2	Meter	Numeric	Meter	Validation based on expected period usage of the MCC for that Unit.
3	Meter TimeStamp	Date	Meter_Dt	Must be a valid date format. See date format parameter.
4	Meter 2	Numeric	Meter2	Validation based on expected period usage of the MCC for that Unit.
5	Meter Date 2	Date	Meter_Dt2	Must be a valid date format. See date format parameter.

Additional considerations:

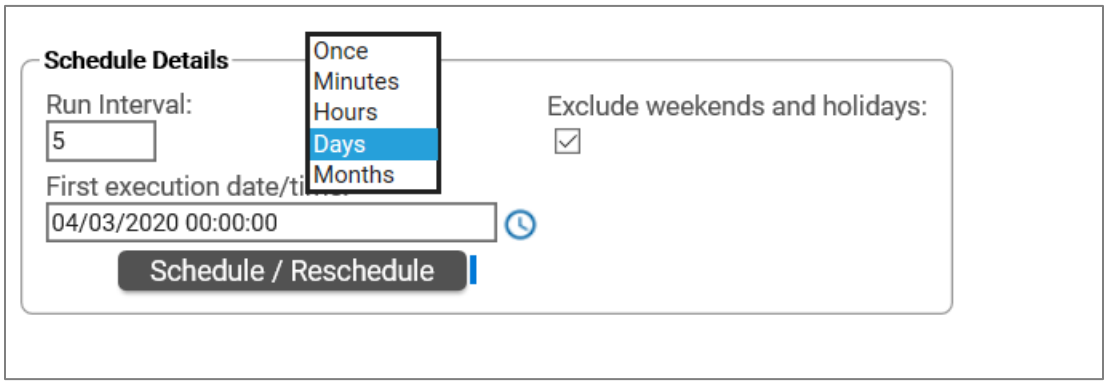
- Unit Number must be a unit number in M5. If the unit is not valid, the transaction will be written the Interface Reject File for reprocessing.
- Meter entered will be validated based on M5's current meter validation component. The meter will have to pass meter update rules defined by the expected period usage on the MCC code of the related vehicle. Meter type, size and expected period usage (Min Usage, Max Usage) are all established on MCC frame.
  System Flag 1053 - Meter rollover limit % is used to check for a meter rollover condition.
- There is a parameter on the interface that permits the meter to be overwritten based on the current M5 processing logic. If the parameter is set to Y, it will set meter on unit_dept_comp_main and meter_jnl. The override_meter_fl will be set to Y and meter_upd_udcm_fl will be set to Y.
- If the parameter is set to N, meters that do not pass M5's meter validation, the transaction will be written the Interface Reject File for reprocessing.

Current Execution Schedule

This i-frame displays the current execution schedule for this interface. Current and previously scheduled runs display the ID, Description, Status, Scheduled Date, Last Run Date, Frequency, Exclude Holidays, Submitted By and Run Desc fields.



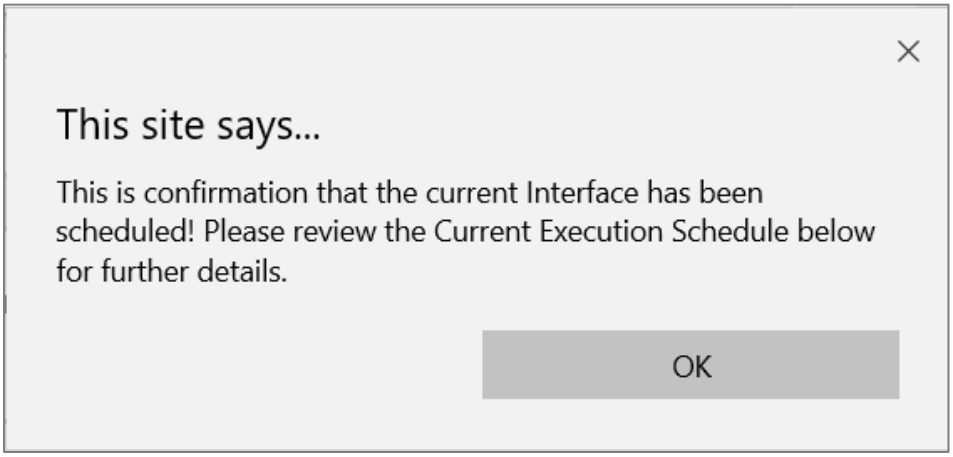
Schedule Details



To schedule the interface, enter schedule details.

1. Select the run interval (Once, Minutes, Hours, Days, Months).
    - If only running one time, currently, you can select **Once**, then select the **Schedule/Reschedule** button.
    - If you select Minutes, Hours, Days, or Months, enter a value for the interval in the **Run Interval** field that displays after your selection is made.
2. If you would like to exclude weekends and holidays from the run, select the **Exclude Weekends and Holidays** checkbox.
3. Enter a **First Execution Date/Time** from which the run interval value should apply.
4. When finished, select the **Schedule/Reschedule** button.

You will receive the following message:

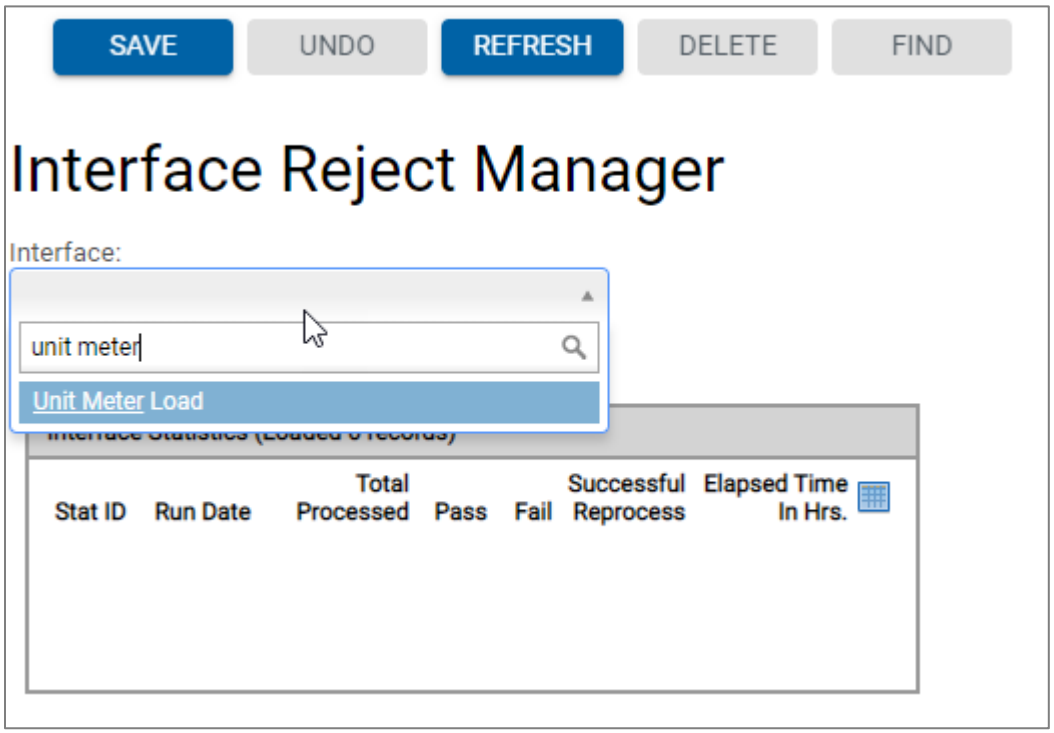


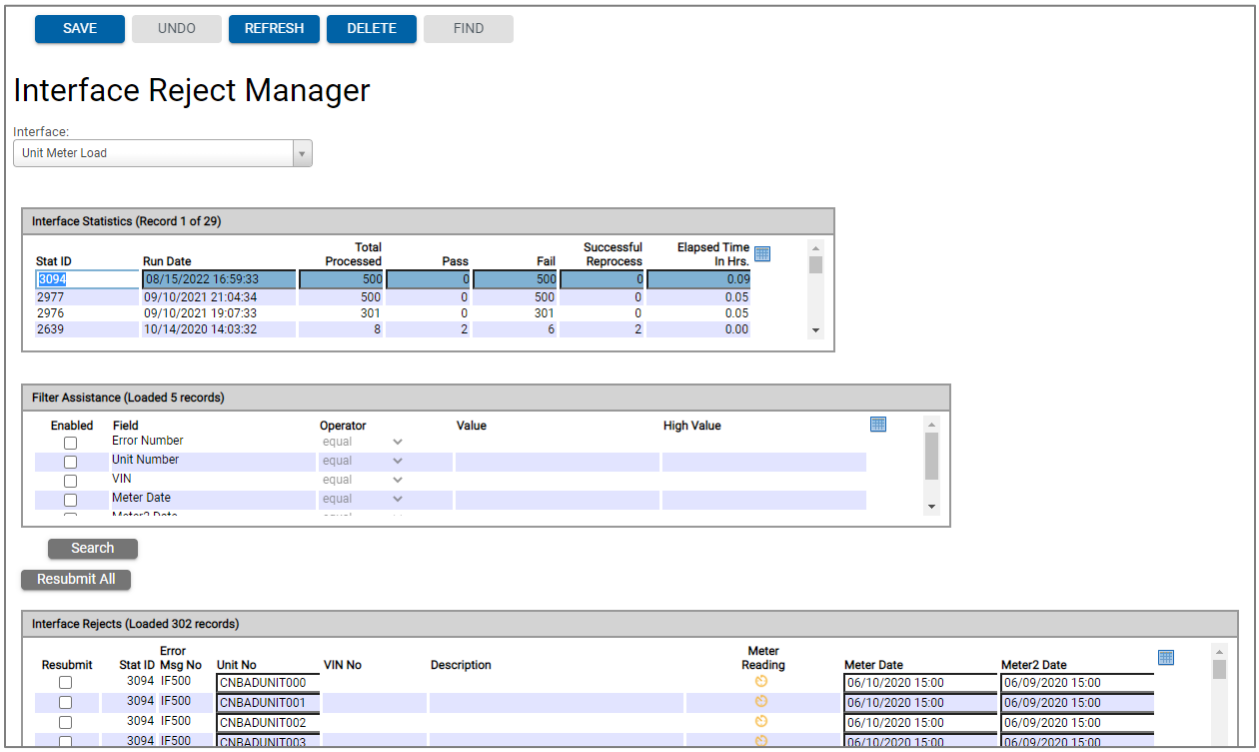
The scheduled run appears on the **Current Execution** i-frame. It can also be viewed on the **System Run List of Jobs** frame.

To view interface rejects, refer to the **Interface Reject Manager** frame.

Interface Reject Manager

To view rejects for the Unit Meter Load interface, navigate to the **Interface Reject Manager** frame. To locate the interface, select from the dropdown list or enter the name.





After selected, the **Interface Statistics** i-frame displays.

1. Select the **Stat ID** for the run you want to view, the **Interface Rejects** i-frame displays.
    - You can scroll to the bottom and select **Show All** in the last row to view all run statistics together. However, there is a limit on how much data M5 can display at one time.
2. If an **Error Msg No.** is available, you can hover over it with your mouse to display the message.
    - Example: 992 – PART DESCRIPTION exceeds maximum length of 30.
3. After you have made the necessary corrections in M5, you can select the **Resubmit** checkbox for each record you want to resubmit.
4. You can also delete any records you do not want to correct or resubmit.
5. Select **SAVE** to reprocess the rejected records.

Error Processing

If a transaction record fails to process (roll-over detected, reading is outside the system calculated average, invalid unit number, or invalid meter date), the data transaction data (along with the error message) will be passed to the common FleetFocus M5 interface reject infrastructure.

The common FleetFocus M5 interface reject infrastructure includes interface statistic information (how many records processed, how may records failed, how many records were reprocessed, or how long did the interface run) as well as rejected transactions for each interface execution cycle.

5. Standard Part Upload

The Standard Part Upload Interface uses an input file format that allows you to:

- Upload master part catalog records (Part Main Catalog).
- Upload inventory location-specific records (Part Inventory Location Manager).
- Upload part item specific records (Part Items).

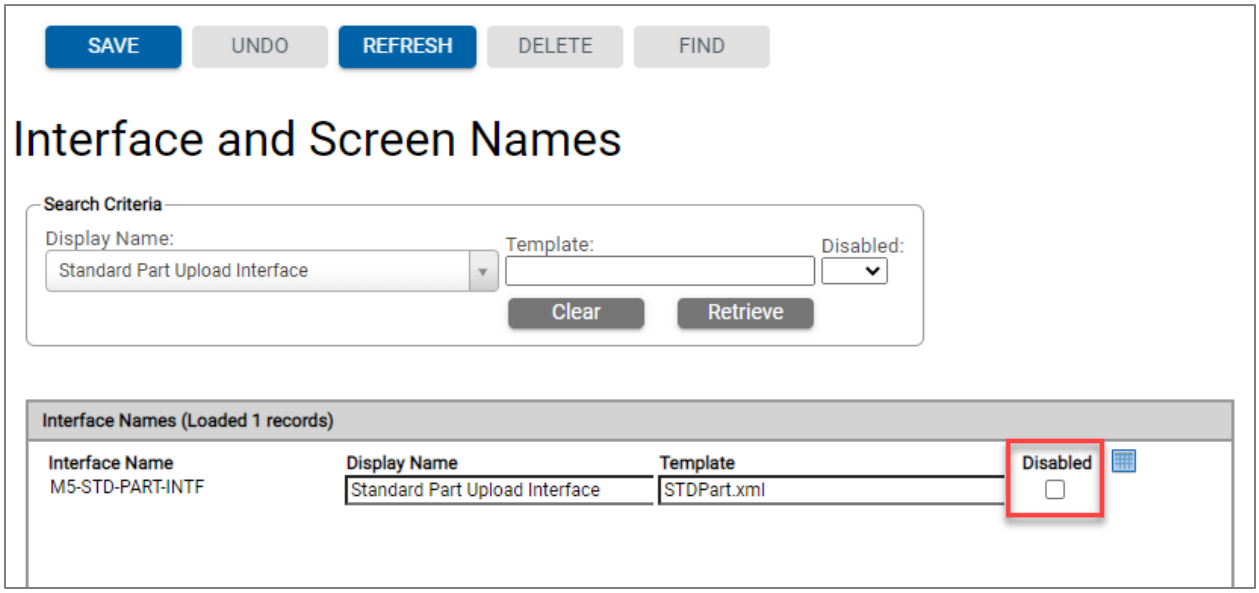
Why:

- Rather than update or create records one at a time, you can use this interface to update or create multiple records in one interface run.

  Please note, it is recommended to use three separate input files. One for Part Main records, a second for Part Inventory Location records, and a third for Part Items.

Interface and Screen Names

Before you can run the interface, you must make sure the interface is enabled for use.



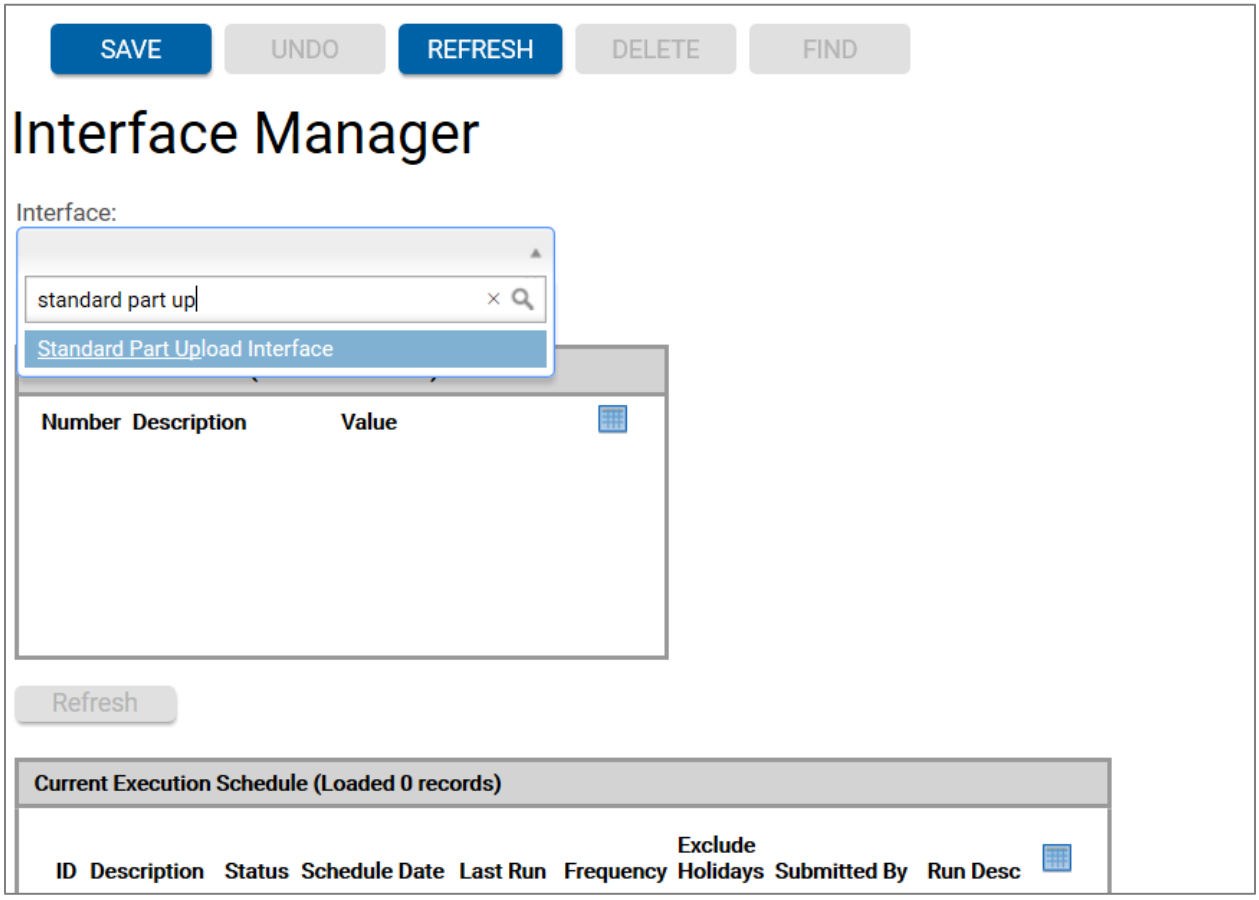
To verify:

1. Navigate to the Interface and Screen Names frame.
2. Scroll the list until you find: **M5-STD-PART-INTF** on the list.
3. Make sure the **Disabled** checkbox is cleared.
4. If it is selected and you want to run the interface, clear the checkbox and select **SAVE**.

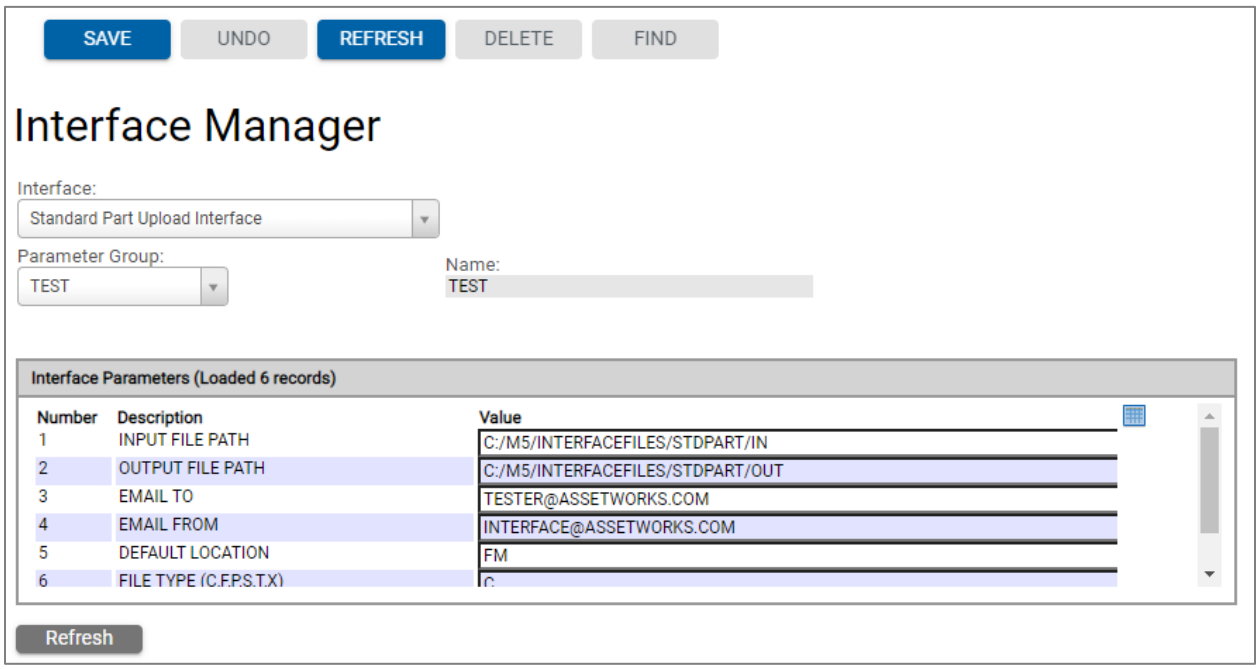
Interface Manager

After verifying that the interface is enabled for use, navigate to the **Interface Manager** frame. To locate the interface, select from the dropdown list or enter the name.

After you select the interface from the dropdown, Interface Parameters, Current Execution Schedule, and Schedule Details display.



Interface Parameters



- The most recent set of saved parameters load when the frame loads. Unlike some interface frames, you are not able to save different sets of parameters.
- To change any of the six values, enter the new information and select **SAVE**.

Interface Parameter Explanations

Parameter Name	Description	Required (Y/N)
INPUT FILE PATH	File path where the input file will be found. Note: This path refers to the C: drive on the batch server. The directory name should not end with a "\", and can either be a mapped drive (C:, Q:, etc.) or with a \\server name\share\directory format.	Y
OUTPUT FILE PATH	File path where the file will be moved upon completion of the interface. Note: This path refers to the C: drive on the batch server. The directory name should not end with a "\", and can either be a mapped drive (C:, Q:, etc.) or with a \\server name\share\directory format.	Y
EMAIL TO	User to whom an email updates will be sent upon about the interface run.	Y

Parameter Name	Description	Required (Y/N)
EMAIL FROM	User from whom the email originates - default will be: Interface@assetworks.com.	Y
DEFAULT LOCATION	Must be a valid M5 inventory location.	Y
FILE TYPE (C,F,P,S,T,X)	Type of file format being used as input. The file will be preprocessed into an XML message which will be sent to the interface. • C – Comma • F – Fixed • P – Pipe • S – Semicolon • T – Tab • X - XML	Y

The interface creates a program log file useful in case of program failure. By default, it will be in the M5\Interface\Logs directory.

File Data

- The data is contained in text file with the following layout.
- The data file will be pre-processed, data elements extracted and reformatted into an XML message which will then be sent to the interface.
- This allows you to use a variety of file formats.
- **Bolded** fields are required.

Sample Data

Column	Column Name	Description	Maps to M5 Column	Required (Y/N)
1	**Record Type**	**Type 1 = Part Catalog** **Type 2 = Part Inventory Location** **Type 3 = Part Item**	**N/A**	**Y**
2	**Location**	**Must be a valid inventory location**	**parts.location** **part_inv_loc.location**	**Y (if record type = 2)**

Column	Column Name	Description	Maps to M5 Column	Required (Y/N)
3	**Part No.**	**The master part number**	**parts.part.no**	**Y**
4	**Manufacturer**	**A valid M5 Manufacturer**	**parts.manufacturer**	**Y (see flag 5024)**
5	**Description**	**Part Description**	**parts.description**	**Y**
6	Part Type	Type of part, N, U or R	parts.part_type	N (defaults to New)
7	Extended Description	Long description	parts.notes	N
8	**Price**	**Unit price**	**parts.unit_do**	**Y (see flag 1058)**
9	ATA System	Valid system code	parts.u_system	N (see flag 5058)
10	ATA Assembly	Valid assembly code	parts.component	N
11	ATA Part	Valid part code for system/assembly combo.	parts.ata_part	N
12	Validate System Code	Y or Blank	parts.val_sys_cd	N
13	**Unit of Inventory**	**Unit of Measure**	**parts.unit_inventory**	**Y**
14	Commodity	Valid M5 Commodity Code.	parts.commodity	N
15	Hazard	Y or Blank	parts.hazard_fl	N
16	Disable Receipt	Y or Blank	parts.disable_fl	N
17	Warranty	Y or Blank	parts.warranty_fl	N
18	Exempt Position Code	Y or Blank	parts.exempt_pos_cd_fl	N
19	Charge Code	Valid charge code.	parts.charge_code	N
20	Cost Category	Valid cost category.	parts.cost_cat_code	N
21	**Stock Type**	**S, N or C**	**parts.ni_ns_fl**	**Y**
22	Primary Vendor	Valid M5 Vendor.	parts.pri_vendor_no	N
23	Secondary Vendor	Valid M5 Vendor.	parts.sec_vendor_no	N

Column	Column Name	Description	Maps to M5 Column	Required (Y/N)
24	Season Code	Valid season code.	parts.season_code	N
25	Serialized	O, M or Blank	parts.serial_fl	N
26	Reusable Serial Number	Y or Blank	parts.serial_reuse	N
27	Core Tracking	Y or Blank	parts.core_fl	N
28	Core Charge		parts.core_charge	N
29	Bin	Inventory Bin/Area	part_inv_store.area	N
30	Minimum qty	Minimum inventory qty	part_inv_loc.PRI_VEN_MIN_ORD, part_inv_loc.SEC_VEN_MIN_ORD	N
31	Maximum qty	Maximum inventory qty	part_inv_loc.PRI_VEN_MAX_ORD, part_inv_loc.SEC_VEN_MAX_ORD	N
32	**Part Item**	**Valid item from Item Master list.**	**part_item.item**	**Y for Type 3 upload only**
33	**Part Item Value**	**Value for Part Item**	**part_item.value**	**Y for Type 3 upload only**
34	Vendor Part Number	A Vendor part xref will be created.	part_inv_loc.vend_xref_id part_xfer.xref_no	N
35	Std Unit of Order	Unit of Measure	part_inv_loc.unit_order_v1	N
36	Pack Size	Pack size	part_inv_loc.pack_size	N
37	Std Order Quantity	Standard Quantity ordered.	part_inv_loc.std_order_qty	N
38	Superseded by Part	Valid part number required.	Parts.supsby_part_id	N
39	Superseded by Part Manufacturer	Valid manufacturer required.	Parts.manufacturer	N
40	National Part	Y/N or Blank	National_part_fl	N
41	Active Flag	Y/N or Blank. Applies to Type 1	Parts.active_fl	N

Column	Column Name	Description	Maps to M5 Column	Required (Y/N)
		entries only. Type 2 or 3 will be ignored. If set to Y, it makes the part ACTIVE on Part Main Catalog. If set to N, it makes the part INACTIVE on Part Main Catalog. If Blank, the status remains unchanged.		

Additional considerations:

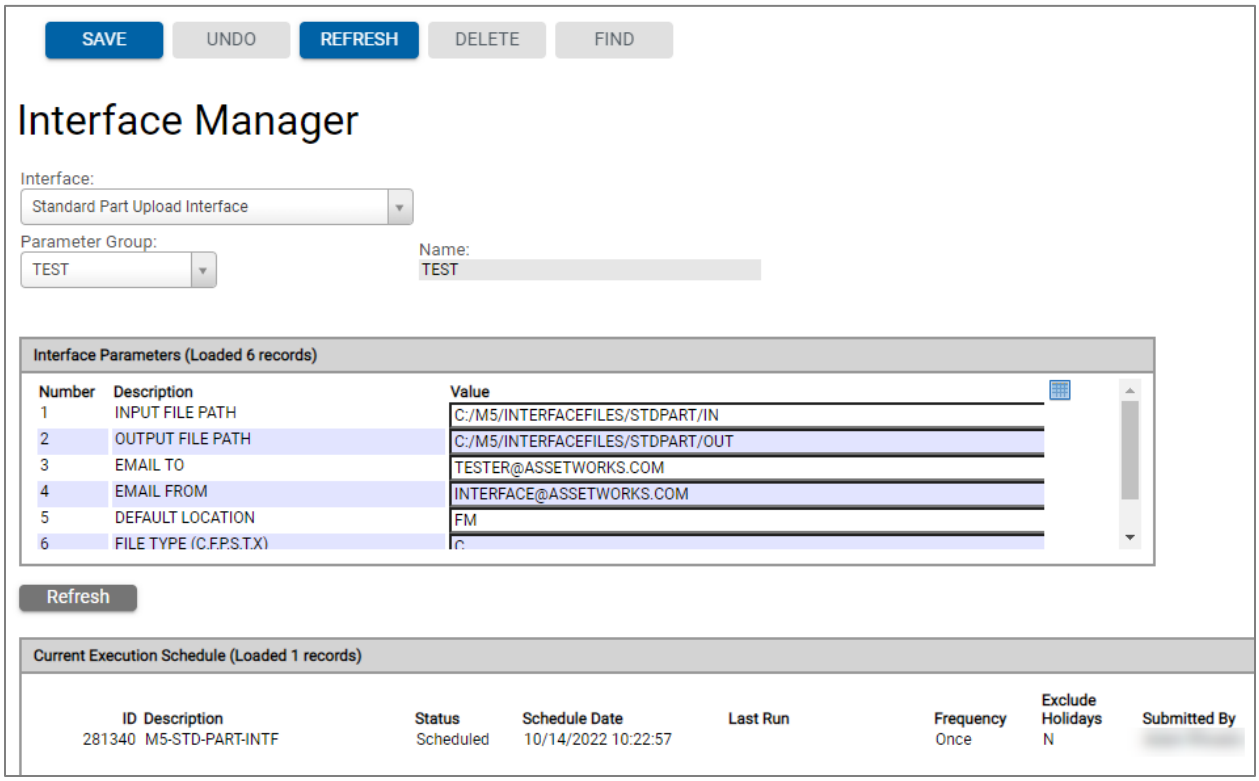
- When the interface is run, each record in the file will be picked up and validated.
- If the type is 1, and the part does not exist, a new part master record will be created.
- If a new part record is being created, standard component validation would take place on each column value entered for the part.
    - For example, when creating a new part record, a part number is required and cannot be greater than 30 characters.
- If the type is 1, and the part exists, the part master record will be updated.
- If the type is 2, the part inventory location catalog will be created.
- If a new location record is being created:
    - Type must be a value of 2.
    - A valid inventory location record must be specified.
    - The part must exist in the main catalog.
    - The part cannot already exist at the inventory location specified.
- If the type is 3, the part item information will be updated.
- If System Flag 5024 is set to Y, as is the default, a valid Part Manufacturer is required.
- If System Flag 5058 is set to Y, a valid ATA System code is required, N is the default.
- If part validation fails, a reject record will be created.

Conditions for columns 38-40:

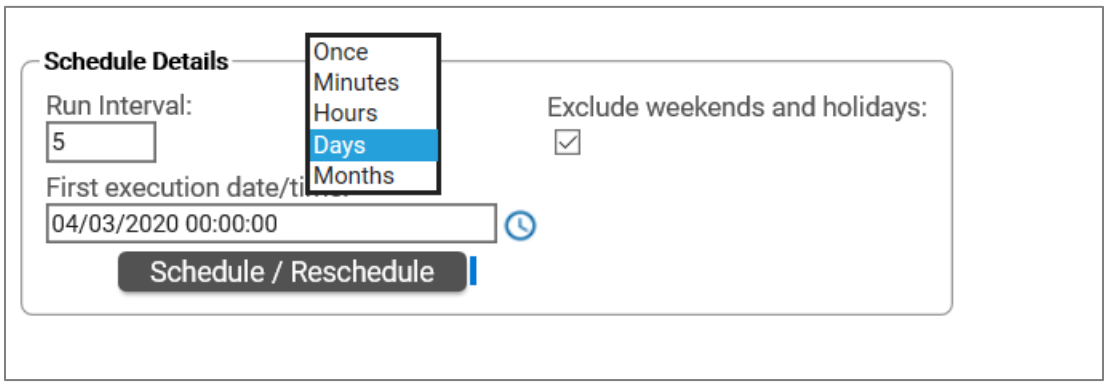
- If either Superseded by Part No or Superseded by Part No MFG is blank while the other is supplied, the row will be rejected.
- In order to put any Superseded part information onto a part, that part needs to already be created in the system.
- If the Part No is not a valid Part in M5 it will be rejected.
- If the MFG is not a valid MFG it will be rejected.
- If the MFG on the Part in the file does not match the one on the Part in the system it will be rejected.
- If National Flag is anything other than Y, N, or Blank it will be rejected.
- All of these situations only happen if the Type = 1, otherwise they are skipped, even if they are supplied

Current Execution Schedule

This i-frame displays the current execution schedule for this interface. Current and previously scheduled runs display the ID, Description, Status, Scheduled Date, Last Run Date, Frequency, Exclude Holidays, Submitted By and Run Desc fields.



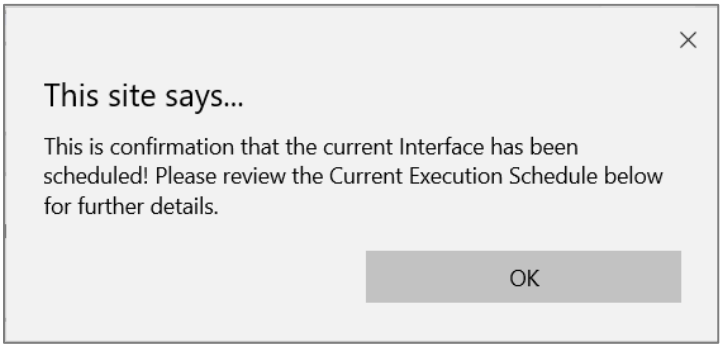
Schedule Details



To schedule the interface, enter schedule details.

1. Select the run interval (Once, Minutes, Hours, Days, Months).
    - If only running one time, currently, you can select **Once**, then select the **Schedule/Reschedule** button.
    - If you select Minutes, Hours, Days, or Months, enter a value for the interval in the **Run Interval** field that displays after your selection is made.
2. If you would like to exclude weekends and holidays from the run, select the **Exclude Weekends and Holidays** checkbox.
3. Enter a **First Execution Date/Time** from which the run interval value should apply.
4. When finished, select the **Schedule/Reschedule** button.

You will receive the following message:



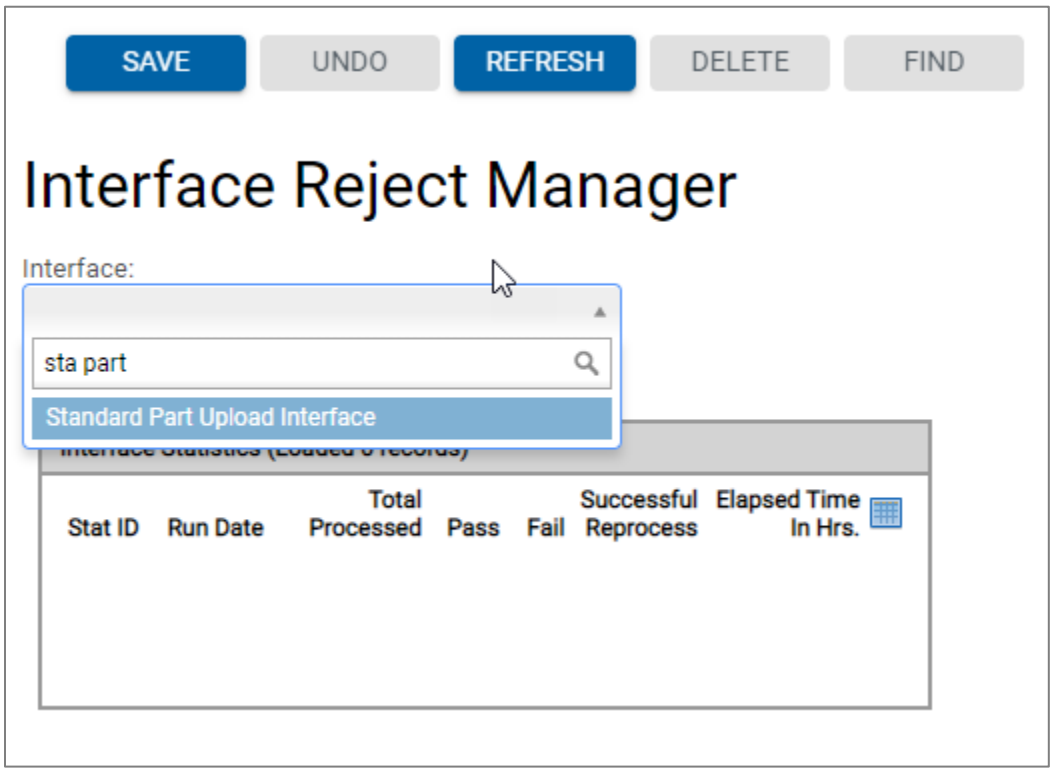
The scheduled run appears on the **Current Execution** i-frame. It can also be viewed on the **System Run List of Jobs** frame.

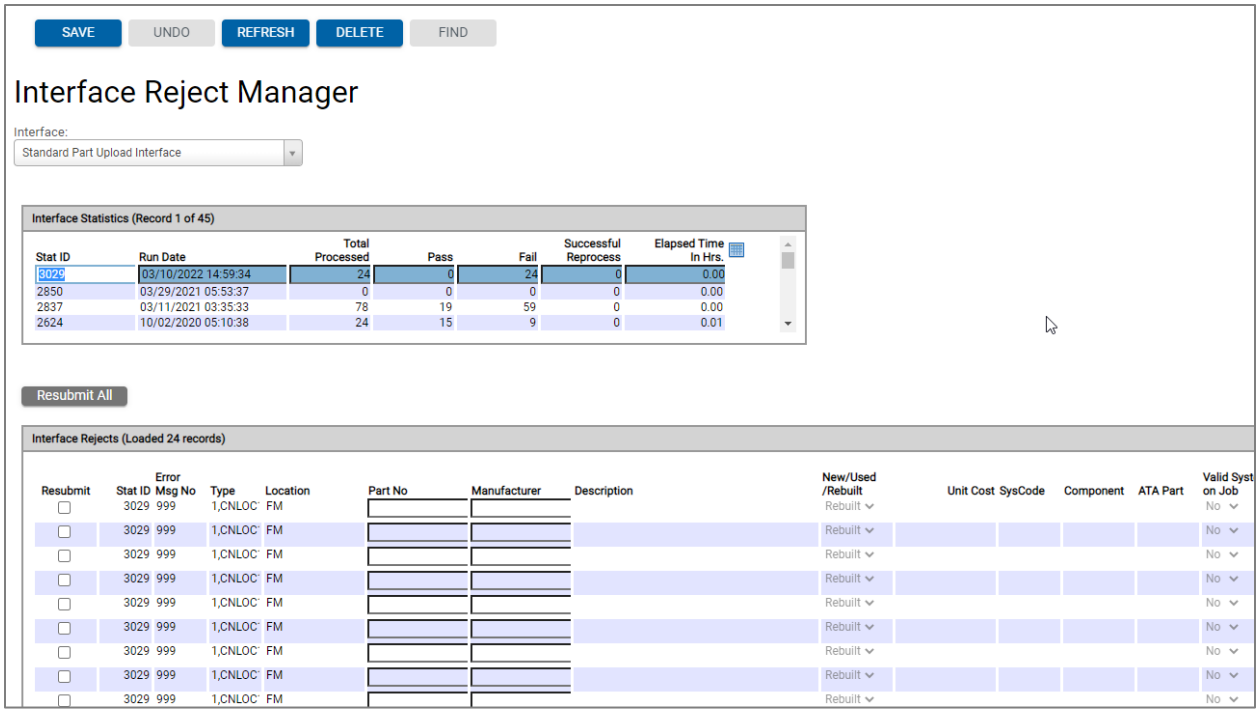
To view interface rejects, refer to the **Interface Reject Manager** frame.

Interface Reject Manager

To view rejects for the Standard Part Upload interface, navigate to the **Interface Reject Manager** frame. To locate the interface, select from the dropdown list or enter the name to find it quicker.

After you select the interface from the dropdown, Interface Parameters, Current Execution Schedule, and Schedule Details display.





After selected, the **Interface Statistics** i-frame displays.

1. Select the **Stat ID** for the run you want to view, the **Interface Rejects** i-frame displays.
    - You can scroll to the bottom and select **Show All** in the last row to view all run statistics together. However, there is a limit on how much data M5 can display at one time.
2. If an **Error Msg No.** is available, you can hover over it with your mouse to display the message.
    - Example: 992 – PART DESCRIPTION exceeds maximum length of 30.
3. After you have made the necessary corrections in M5, you can select the **Resubmit** checkbox for each record you want to resubmit.
4. You can delete records you do not want to correct or resubmit.
5. Select **SAVE** to reprocess the rejected records.

6. Tech Spec Load

The Tech Spec Load interface is a one-way, inbound interface that allows you to upload mass quantities of Tech spec data in several file formats, including XML, Fixed Length and Delimited formats.

Please note, the interface is intended for uploading new data rather than updating or disabling any existing data.

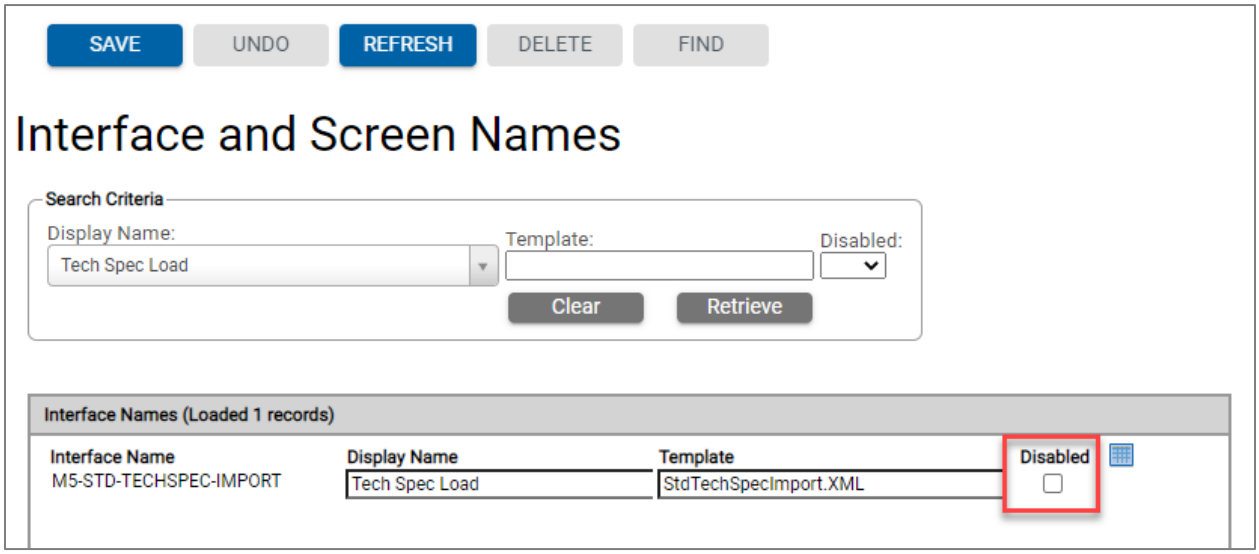
The interface uses standard M5 scheduling and reject processing functionality by using the Interface Manager and Interface Reject Manager frames, respectively.

Considerations:

- Interface must be enabled on the Interface and Screen Names frame.
- System Flag 5268 (Use Tech Spec Templates) must be set to N.
- System Flag 5289 (Warn/Force Entry of Not-Null, Positive Fuel Economy Estimate on Tech Spec) will only have an effect if the value is set to F.
- System Flag 5174 (Category Required?) will only have an effect if the value is set to Y.

Interface and Screen Names

Before you can run the interface, you must make sure the interface is enabled for use.



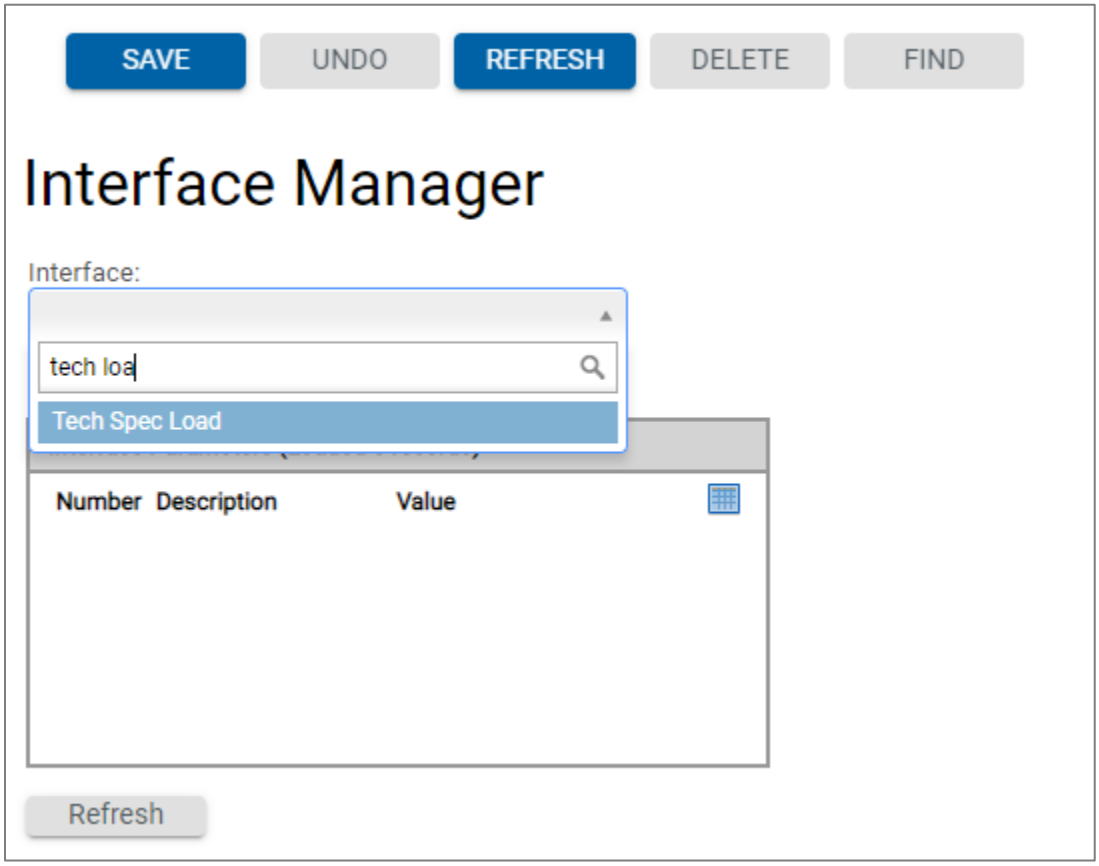
To verify:

1. Navigate to the Interface and Screen Names frame.
2. Scroll the list until you find: **M5-STD-TECHSPEC-IMPORT** on the list.
3. Make sure the **Disabled** checkbox is cleared.
4. If it is selected and you want to run the interface, clear the checkbox and select **SAVE**.

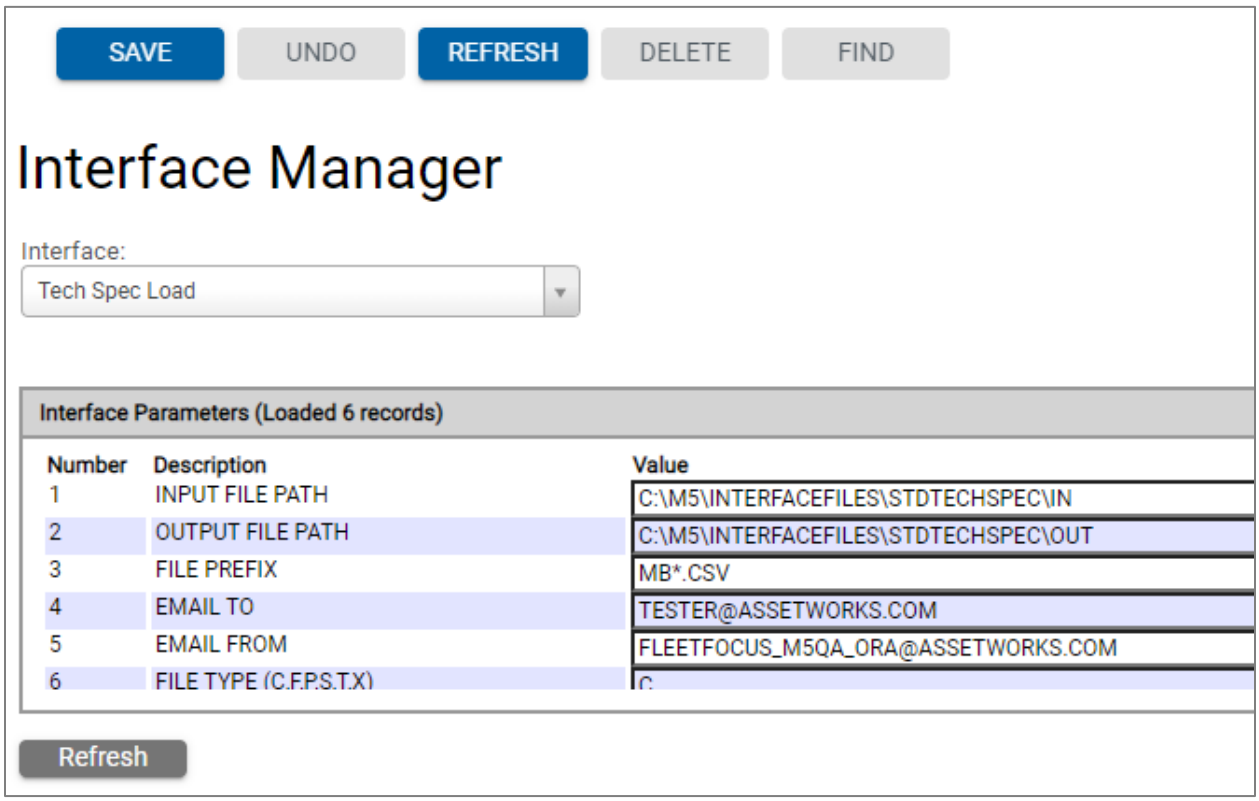
Interface Manager

After verifying that the interface is enabled for use, navigate to the **Interface Manager** frame. To locate the interface, select from the dropdown list or enter the name to find it quicker.

After you select the interface from the dropdown, Interface Parameters, Current Execution Schedule, and Schedule Details display.



Interface Parameters



- The most recent set of saved parameters load when the frame loads. Unlike some interface frames, you are not able to save different sets of parameters.
- To change any of the six values, enter the new information and select **SAVE**.

Interface Parameter Explanations

Parameter Name	Description	Required (Y/N)
INPUT FILE PATH	File path where the input file will be found. Note: This path refers to the C: drive on the batch server. The directory name should not end with a "\", and can either be a mapped drive (C:, Q:, etc.) or with a \\server name\share\directory format.	Y
OUTPUT FILE PATH	File path where the file will be moved upon completion of the interface. Note: This path refers to the C: drive on the batch server. The directory name should not end with a "\", and can either be a mapped drive (C:, Q:, etc.) or with a \\server name\share\directory format.	Y

Parameter Name	Description	Required (Y/N)
FILE PREFIX	This must have a value and may either contain the starting portion of the file name and a wild card, or the * wild card character and file extension for the input file found in the INPUT FILE PATH folder. Ie *.CSV will process all files with an extension of .CSV. This would be paired with the FILE TYPE (below) of C. STD*.CSV will process any file starting with STD and ending with the extension .CSV. STDTECH* would process all files starting with "STDTECH" and any extension. STDTECH.XML would process the file called STDTECH.XML in the INPUT FILE PATH folder. This would be paired with FILE TYPE X for XML formatted files.	Y
EMAIL TO	User to whom an email updates will be sent upon about the interface run.	Y
EMAIL FROM	User from whom the email originates - default will be: Interface@assetworks.com.	Y
FILE TYPE (C,F,P,S,T,X)	Type of file format being used as input. The file will be preprocessed into an XML message which will be sent to the interface. • C – Comma • F – Fixed • P – Pipe • S – Semicolon • T – Tab • X - XML	Y

The interface creates a program log file useful in case of program failure. By default, it will be in the M5\Interface\Logs directory.

File Data

This interface is written to manage several file formats, including XML, Fixed Length and Delimited formats. Below is a description of each layout.

Delimited format files must contain a header record. This record will be ignored by the interface.

XML Format

Field Name	Tag	Max Length	Valid Values	M5 Column
YEAR	<YEAR>	5	Integer	TECH_SPEC.YEAR
CATEGORY	<CATEGORY>	13	Must be a valid M5 Category.	TECH_SPEC.CATEGORY
MAKE	<MAKE>	30	Must be a valid M5 Make for this Manufacturer.	TECH_SPEC.MAKE
MANUFACTURER	<MANUFACTURER>	30	Must be a valid M5 Manufacturer.	TECH_SPEC.MANUFACTURER
FUEL CLASS	<FUEL_CLASS>	20	Must be a valid M5 Static Code – code type = FUEL_CLASS.	TECH_SPEC.FUEL_CLASS
VEHICLE TYPE	<VEH_TYPE>	20	Must be a valid M5 Static Code - code type = VEH_TYPE.	TECH_SPEC.VEH_TYPE
MODEL	<MODEL>	30	Must be a valid Model for this Manufacturer/ Make.	TECH_SPEC.MODEL
SPEC NUMBER	<SPEC_NO>	13	Must not already exists in TECH_SPEC.	TECH_SPEC.SPEC_NO.
OFF HWY PERCENT	<OFF_HWY_PC>	5	Number with explicit floating decimal point between 0 and 100 (for example, 1.234).	TECH_SPEC.OFF_HYW_PC
REPLACEMENT	<REPLACE_PC	10	Number with	TECH_SPEC.REPLACE_PC

Field Name	Tag	Max Length	Valid Values	M5 Column
PERCENT	>		explicit floating decimal point (for example, 1.235).	
DESCRIPTION	<DESCRIPTION>	100		TECH_SPEC.DESCRIPTION
TRIM	<TRIM>	20		TECH_SPEC.TRIM
REFERENCE	<REFERENCE>	20		TECH_SPEC.REFERENCE
GVW	<GVW>	10		TECH_SPEC.GVW
FUEL ECONOMY CITY	<UPQ_CITY>	10		TECH_SPEC.UPQ_CITY
FUEL ECONOMY HIGHWAY	<UPQ_HIGHWAY>	10		TECH_SPEC.UPQ_HIGHWAY
FUEL ECONOMY COMBINED	<UPQ_COMBINED>	10		TECH_SPEC.UPQ_COMBINED
NOTES	<NOTES>	4000		TECH_SPEC.NOTES
SPEC WO NOTES	<SPEC_WO_NOTES>	4000		TECH_SPEC.SPEC_WO_NOTES

Fixed Format

Field Name	Start Position	Length	Valid Values	M5 Column
SPEC NUMBER	1	13	Must not already exists in TECH_SPEC.	TECH_SPEC.SPEC_NO.
DESCRIPTION	14	100		TECH_SPEC.DESCRIPTION
YEAR	114	5	Integer	TECH_SPEC.YEAR
MANUFACTURER	119	30	Must be a valid M5 Manufacturer.	TECH_SPEC.MANUFACTURER
MAKE	149	30	Must be a valid M5 Make for this Manufacturer.	TECH_SPEC.MAKE
MODEL	179	30	Must be a valid Model for this	TECH_SPEC.MODEL

Field Name	Start Position	Length	Valid Values	M5 Column
			Manufacturer/ Make.	
TRIM	209	20		TECH_SPEC.TRIM
REFERENCE	229	20		TECH_SPEC.REFERENCE
CATEGORY	249	13	Must be a valid M5 Category.	TECH_SPEC.CATEGORY
REPLACEMENT PERCENT	262	10	Number with explicit floating decimal point (for example,1.235).	TECH_SPEC.REPLACE_PC
GVW	272	10		TECH_SPEC.GVW
OFF HWY PERCENT	282	5	Number with explicit floating decimal point between 0 and 100 (for example, 1.234).	TECH_SPEC.OFF_HYW_PC
VEHICLE TYPE	287	20	Must be a valid M5 Static Code - code type = VEH_TYPE.	TECH_SPEC.VEH_TYPE
FUEL CLASS	307	20	Must be a valid M5 Static Code - code type = FUEL_CLASS.	TECH_SPEC.FUEL_CLASS
FUEL ECONOMY CITY	327	10		TECH_SPEC.UPQ_CITY
FUEL ECONOMY HIGHWAY	337	10		TECH_SPEC.UPQ_HIGHWAY
FUEL ECONOMY COMBINED	347	10		TECH_SPEC.UPQ_COMBINED
NOTES	357	4000		TECH_SPEC.NOTES
SPEC WO NOTES	4357	4000		TECH_SPEC.SPEC_WO_NOTES

Delimited Format

Header required.

Field Name	Max Length	Valid Values	M5 Column
CATEGORY	13	Must be a valid M5 Category.	TECH_SPEC.CATEGORY
DESCRIPTION	100		TECH_SPEC.DESCRIPTION
FUEL CLASS	20	Must be a valid M5 Static Code - code type = FUEL_CLASS.	TECH_SPEC.FUEL_CLASS
FUEL ECONOMY CITY	10		TECH_SPEC.UPQ_CITY
FUEL ECONOMY COMBINED	10		TECH_SPEC.UPQ_COMBINED
FUEL ECONOMY HIGHWAY	10		TECH_SPEC.UPQ_HIGHWAY
GVW	10		TECH_SPEC.GVW
MAKE	30	Must be a valid M5 Make for this Manufacturer.	TECH_SPEC.MAKE
MANUFACTURER	30	Must be a valid M5 Manufacturer.	TECH_SPEC.MANUFACTURER
MODEL	30	Must be a valid Model for this Manufacturer/Make.	TECH_SPEC.MODEL
NOTES	4000		TECH_SPEC.NOTES
OFF HWY PERCENT	5	Number with explicit floating decimal point between 0 and 100 (for example,1.234).	TECH_SPEC.OFF_HYW_PC
REFERENCE	20		TECH_SPEC.REFERENCE
REPLACEMENT PERCENT	10	Number with explicit floating decimal point (for example, 1.235).	TECH_SPEC.REPLACE_PC
SPEC NUMBER	13	Must not already exists in TECH_SPEC.	TECH_SPEC.SPEC_NO.
SPEC WO	4000		TECH_SPEC.SPEC

Field Name	Max Length	Valid Values	M5 Column
NOTES			_WO_NOTES
TRIM	20		TECH_SPEC.TRIM
VEHICLE TYPE	20	Must be a valid M5 Static Code - code type = VEH_TYPE.	TECH_SPEC.VEH_TYPE
YEAR	5	Integer	TECH_SPEC.YEAR

Sample Data

XML:

```
<TECHSPECS>
  <TECHSPEC>
    <SPEC_NO>32168596A4562</SPEC_NO>
    <DESCRIPTION>Test Description - 30 characters</DESCRIPTION>
    <YEAR>2015</YEAR>
    <MANUFACTURER>FORD</MANUFACTURER>
    <MAKE>E350</MAKE>
    <MODEL>VAN</MODEL>
    <TRIM>TEST</TRIM>
    <REFERENCE>TEST</REFERENCE>
    <CATEGORY>21</CATEGORY>
    <REPLACE_PC>8</REPLACE_PC>
    <GVW>2500</GVW>
    <OFF_HWY_PC>0</OFF_HWY_PC>
    <VEH_TYPE>PASS_CAR</VEH_TYPE>
    <FUEL_CLASS>MINIVAN 2WD</FUEL_CLASS>
    <UPQ_CITY>0</UPQ_CITY>
    <UPQ_HIGHWAY>0</UPQ_HIGHWAY>
    <UPQ_COMBINED>0</UPQ_COMBINED>
    <NOTES>TEST NOTES</NOTES>
    <SPEC_WO_NOTES>TEST NOTES</SPEC_WO_NOTES>
  </TECHSPEC>
 <TECHSPEC>
```

```
        <SPEC_NO>JOTECH1</SPEC_NO>
        <DESCRIPTION>JO DESCRIPTION</DESCRIPTION>
        <YEAR>2020</YEAR>
        <MANUFACTURER>GMC</MANUFACTURER>
        <MAKE>SIERRA</MAKE>
        <MODEL>1500</MODEL>
        <TRIM>TRIM-RED</TRIM>
        <REFERENCE>REFERENCE-0000</REFERENCE>
        <CATEGORY>21</CATEGORY>
        <REPLACE_PC>.3</REPLACE_PC>
        <GVW>1500</GVW>
        <OFF_HWY_PC>.5</OFF_HWY_PC>
        <VEH_TYPE>PASS_CAR</VEH_TYPE>
        <FUEL_CLASS>MINIVAN 4WD</FUEL_CLASS>
        <UPQ_CITY>10.5</UPQ_CITY>
        <UPQ_HIGHWAY>15.5</UPQ_HIGHWAY>
        <UPQ_COMBINED>.6</UPQ_COMBINED>
        <NOTES>TECH NOTES</NOTES>
        <SPEC_WO_NOTES>WO NOTES</SPEC_WO_NOTES>
    </TECHSPEC>
</TECHSPECS>
```

Fixed:

	A	B	C	D	E	F	G	H	I	J	K	L	M	N	O	P	Q	R	S	T
1	NUMBER	DESCRIPTI	YEAR	MANUFAC	MAKE	MODEL	TRIM	REFERENC	CATEGOR\	REPLPCT	GVW	OFFRDUSE	VEHTYPE	FUELCLAS	FUELCITY	FUELHIGH	FUELCOM	TSNOTES	TSWONOTES	
2	JOTECH11	JO DESCRI	2020	GMC	SIERRA	4X4	TRIM-RED	REFERENC	21	0.3	1500	0.5	PASS_CAR	MINIVAN 4WD				TECH NOT	"WO NOTES"	
3	JOTECH20	INVALID M	2020	GMC	SIERRASSS	4X4	TRIM-RED	REFERENC	21	0.3	1500	0.5	PASS_CAR	MINIVAN 4	10.5	15.5	0.6	TECH NOT	"WO NOTES"	
4	JOTECH19	INVALID M	2020	GMM	SIERRA	4X4	TRIM-RED	REFERENC	21	0.3	1500	0.5	PASS_CAR	MINIVAN 4	10.5	15.5	0.6	TECH NOT	"WO NOTES"	
5	32168596/	Test Descr	2015	FORD	E35	VAN	TEST	TEST	21	8	2500	0	PASS_CAR	MINIVAN 2	0	0	0	"TEST NOT	"TEST NOTES"	
6	JOTECH2	JO DESCRI	2020	GMC	SIERRA	4X4	TRIM-RED	REFERENC	21	0.3	1500	0.5	PASS_CAR	MINIVAN 4	10.5	15.5	0.6	TECH NOT	"WO NOTES"	
7	JOTECH3	TRIM TOO	2020	GMC	SIERRA	4X4	TRIM1111	REFERENC	21	0.3	1500	0.5	PASS_CAR	MINIVAN 4	10.5	15.5	0.6	TECH NOT	"WO NOTES"	
8	JOTECH4	REF TOO L	2020	GMC	SIERRA	4X4	TRIM-RED	REFERENC	21	0.3	1500	0.5	PASS_CAR	MINIVAN 4	10.5	15.5	0.6	TECH NOT	"WO NOTES"	
9	JOTECH5	INVALID C	2020	GMC	SIERRA	4X4	TRIM-RED	REFERENC	2X	0.3	1500	0.5	PASS_CAR	MINIVAN 4	10.5	15.5	0.6	TECH NOT	"WO NOTES"	
10	JOTECH6	INVALID R	2020	GMC	SIERRA	4X4	TRIM-RED	REFERENC	21	.X	1500	0.5	PASS_CAR	MINIVAN 4	10.5	15.5	0.6	TECH NOT	"WO NOTES"	
11	JOTECH7	INVALID G	2020	GMC	SIERRA	4X4	TRIM-RED	REFERENC	21	0.5	X	0.5	PASS_CAR	MINIVAN 4	10.5	15.5	0.6	TECH NOT	"WO NOTES"	
12	JOTECH81	INVALID H	2020	GMC	SIERRA	4X4	TRIM-RED	REFERENC	21	0.3	1500	99.9999	PASS_CAR	MINIVAN 4	10.5	15.5	0.6	TECH NOT	"WO NOTES"	
13	JOTECH31	INVALID V	2020	GMC	SIERRA	4X4	TRIM-RED	REFERENC	21	14	1500	0.5	PASS	MINIVAN 4	10.5	15.5	0.6	TECH NOT	"WO NOTES"	
14	JOTECH30	INVALID FI	2020	GMC	SIERRA	4X4	TRIM-RED	REFERENC	21	0.3	1500	0.5	PASS_CAR	MINIVAN	10.5	15.5	0.6	TECH NOT	"WO NOTES"	
15	JOTECH11	INVALID U	2020	GMC	SIERRA	4X4	TRIM-RED	REFERENC	21	0.03	1500	0.5	PASS_CAR	MINIVAN 4	10.X	15.5	0.6	TECH NOT	"WO NOTES"	
16	JOTECH12	INVALID U	2020	GMC	SIERRA	4X4	TRIM-RED	REFERENC	21	0.03	1500	0.5	PASS_CAR	MINIVAN 4	10.5	A	0.6	TECH NOT	"WO NOTES"	
17	JOTECH13	INVALID U	2020	GMC	SIERRA	4X4	TRIM-RED	REFERENC	21	11	1500	0.5	PASS_CAR	MINIVAN 4	10.5	15.5	D	TECH NOT	"WO NOTES"	
18	JOTECH14	MISSING C	2020	GMC	SIERRA	4X4	TRIM-RED	REFERENC	21	0.5	1500	0.5	PASS_CAR	MINIVAN 4WD				TECH NOT	"WO NOTES"	
19		BLANK SPE	2020	GMC	SIERRA	4X4	TRIM-RED	REFERENC	21	4	1500	0.5	PASS_CAR	MINIVAN 4	10.5	15.5	0.6	TECH NOT	"WO NOTES"	
20	JOTECH61	TOO LONG	2020	GMC	SIERRA	4X4	TRIM-RED	REFERENC	21	0.3	1500	0.5	PASS_CAR	MINIVAN 4	10.5	15.5	0.6	TECH NOT	"WO NOTES"	
21	JOTECH15		2020	GMC	SIERRA	4X4	TRIM-RED	REFERENC	21	1	1500	0.5	PASS_CAR	MINIVAN 4	10.5	15.5	0.6	TECH NOT	"WO NOTES"	
22	JOTECH16	INVALID Y	20A	GMC	SIERRA	4X4	TRIM-RED	REFERENC	21	1	1500	0.5	PASS_CAR	MINIVAN 4	10.5	15.5	0.6	TECH NOT	"WO NOTES"	
23	JOTECH17	YEAR TOO	2020000	GMC	SIERRA	4X4	TRIM-RED	REFERENC	21	2	1500	0.5	PASS_CAR	MINIVAN 4	10.5	15.5	0.6	TECH NOT	"WO NOTES"	
24	JOTECH18	INVALID Y	20	GMC	SIERRA	4X4	TRIM-RED	REFERENC	21	3	1500	0.5	PASS_CAR	MINIVAN 4	10.5	15.5	0.6	TECH NOT	"WO NOTES"	
25	JOTECH21	INVALID M	2020	GMC	SIERRA	C	TRIM-RED	REFERENC	21	0.3	1500	0.5	PASS_CAR	MINIVAN 4	10.5	15.5	0.6	TECH NOT	"WO NOTES"	

Processing Rules:

	A	G	H	J
1	Position Title	Required	Validated	Rules/Processing
2	NUMBER	Y	N	Minimum of 1 character, no more than 13. Standard M5 Tech Spec Numbering rules apply. Missing or > 13 will result in rejection.
3	DESCRIPTION	Y	N	Minimum of 1 character, no more than 100 characters. Missing or > 100 will result in rejection.
4	YEAR	Y	Y	Must be a valid 4-digit year. Missing or invalid values will result in rejection.
5	MANUFACTURER	Y	Y	Must be a valid M5 Manufacturer. Missing or invalid values will be rejected.
6	MAKE	Y	Y	Must be a valid M5 Make. Missing or invalid values will result in rejection.
7	MODEL	Y	Y	Must be a valid M5 Model. Missing or invalid values will result in rejection.
8	TRIM	N	N	Freeform, optional. If > 20 characters, reject.
9	REFERENCE	N	N	Freeform, optional. If > 20 characters, reject.
10	CATEGORY	N	Y	If System flag 5174 = Y, value is required If System Flag 5174 = W/O, value is optional. If value is populated it must exist in M5 on the CATEGORY table and must be enabled - if it does not, reject. If value is populated and > 13 characters, reject.
11	REPLPCT	N	N	Optional. Number with explicit floating decimal point (may auto-populate from Category/other areas, if data conflicts, use value in file)
12	GVW	N	N	Optional. 10 digit integer (may auto-populate from Category/other areas, if data conflicts, use value in file) if > 10 characters, reject.
13	OFFRDUSE	Conditional	N	Optional. Number with explicit floating decimal point, default to 0.0 if value not found on file.
14	VEHTYPE	N	Y	Optional. Must be a valid value in STATIC_CODES where CODE_TYPE = 'VEH_TYPE'
15	FUELCLASS	N	Y	Optional. Must be a valid value in STATIC_CODES where CODE_TYPE = 'FUEL_CLASS'
16	FUELCITY	Conditional	N	REQUIRED WHEN 5289 =F, REJECT IF MISSING AND (NO FUELHIGHWAY OR FUELCOMBINED VALUE)
17	FUELHIGHWAY	Conditional	N	REQUIRED WHEN 5289 =F, REJECT IF MISSING AND (NO FUELHIGHCITY OR FUELCOMBINED VALUE)
18	FUELCOMBINED	Conditional	N	REQUIRED WHEN 5289 =F, REJECT IF MISSING AND (NO FUELHIGHWAY OR FUELCITY VALUE)
19	TSNOTES	N	N	If the notes include any special characters they must be surrounded in " for proper functionality for delimted file formats only
20	TSWONOTES	N	N	If the notes include any special characters they must be surrounded in " for proper functionality for delimited file formats only
21				

Comma Delimited:

NUMBER,DESCRIPTION,YEAR,MANUFACTURER,MAKE,MODEL,TRIM,REFERENCE,CATEGORY,REPLPCT,GVW,OFFRDUSE,VEHTYPE,FUELCLASS,FUELCITY,FUELHIGHWAY,FUELCOMBINED,TSNOTES,TSWONOTES
32168596A4562,Test Description - 30 characters,2015,FORD,E350,VAN,TEST,TEST,21,8,2500,0,PASS_CAR,MINIVAN 2WD,0,0,0,"""TEST NOTES""","""TEST NOTES"""
JOTECH1,"JO DESCRIPTION",2020,GMC,SIERRA,4X4,TRIM-RED,REFERENCE-0000,21,.3,1500,.5,PASS_CAR,MINIVAN 4WD,10.5,15.5,.6,"TECH NOTES", "WO NOTES"
JOTECH2,"JO DESCRIPTION TOO LONG ",2020,GMC,SIERRA,4X4,TRIM-RED,REFERENCE-0000,21,.3,1500,.5,PASS_CAR,MINIVAN 4WD,10.5,15.5,.6,"TECH NOTES", "WO NOTES"
JOTECH3,"TRIM TOO LONG",2020,GMC,SIERRA,4X4,TRIM1111122222444455555,REFERENCE-0000,21,.3,1500,.5,PASS_CAR,MINIVAN 4WD,10.5,15.5,.6,"TECH NOTES", "WO NOTES"
JOTECH4,"REF TOO LONG",2020,GMC,SIERRA,4X4,TRIM-RED,REFERENCE-000011112222233333,21,.3,1500,.5,PASS_CAR,MINIVAN 4WD,10.5,15.5,.6,"TECH NOTES", "WO NOTES"
JOTECH5,"INVALID CAT",2020,GMC,SIERRA,4X4,TRIM-RED,REFERENCE-0000,2X,.3,1500,.5,PASS_CAR,MINIVAN 4WD,10.5,15.5,.6,"TECH NOTES", "WO NOTES"
JOTECH6,"INVALID REPLACE PC",2020,GMC,SIERRA,4X4,TRIM-RED,REFERENCE-0000,21,.X,1500,.5,PASS_CAR,MINIVAN 4WD,10.5,15.5,.6,"TECH NOTES", "WO NOTES"

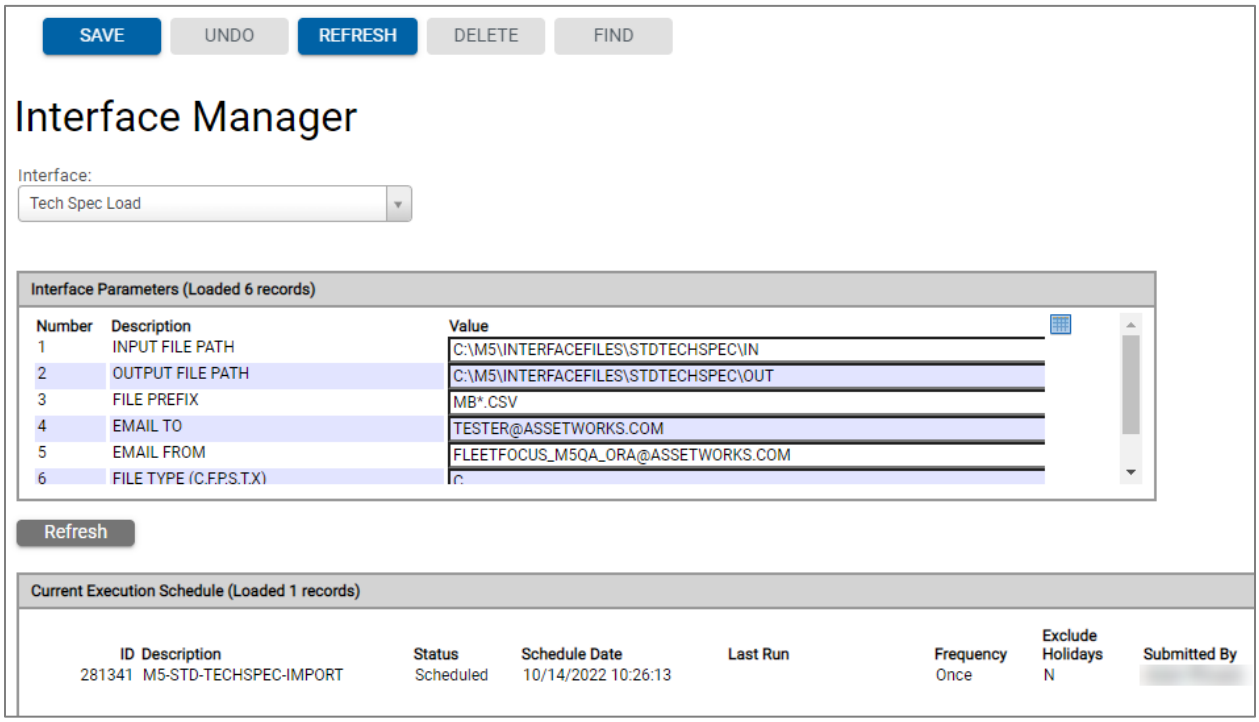
Pipe Delimited:

NUMBER|DESCRIPTION|YEAR|MANUFACTURER|MAKE|MODEL|TRIM|REFERENCE|CATEGORY|REPLPCT|GVW|OFFRDUSE|VEHTYPE|FUELCLASS|FUELCITY|FUELHIGHWAY|FUELCOMBINED|TSNOTES|TSWONOTES
32168596A4562|Test Description - 30

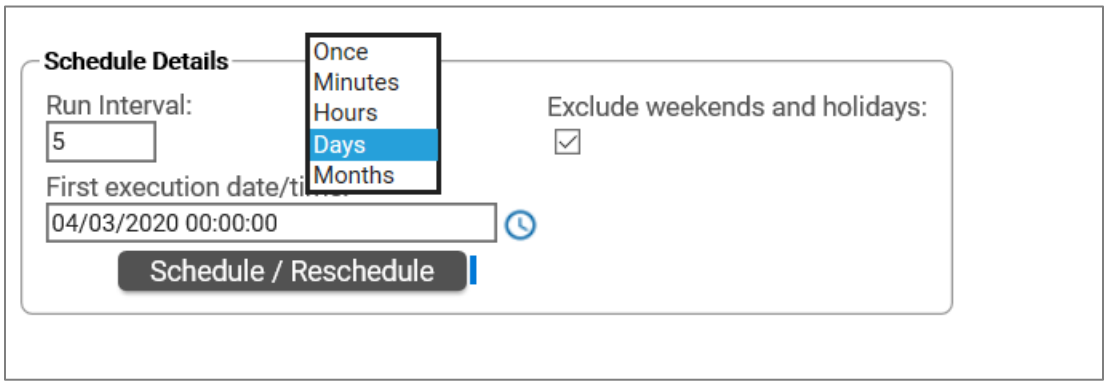
characters|2015|FORD|E350|VAN|TEST|TEST|21|8|2500|0|PASS_CAR|MINIVAN 2WD|0|0|0|"""TEST NOTES"""|"""TEST NOTES"""
JOTECH1|"JO DESCRIPTION"|2020|GMC|SIERRA|4X4|TRIM-RED|REFERENCE-0000|21|.3|1500|.5|PASS_CAR|MINIVAN 4WD|10.5|15.5|.6|"TECH NOTES"| "WO NOTES"
JOTECH2|"JO DESCRIPTION TOO LONG "|2020|GMC|SIERRA|4X4|TRIM-RED|REFERENCE-0000|21|.3|1500|.5|PASS_CAR|MINIVAN 4WD|10.5|15.5|.6|"TECH NOTES"| "WO NOTES"
JOTECH3|"TRIM TOO LONG"|2020|GMC|SIERRA|4X4|TRIM1111122222444445555|REFERENCE-0000|21|.3|1500|.5|PASS_CAR|MINIVAN 4WD|10.5|15.5|.6|"TECH NOTES"| "WO NOTES"
JOTECH4|"REF TOO LONG"|2020|GMC|SIERRA|4X4|TRIM-RED|REFERENCE-0000111122222333333|21|.3|1500|.5|PASS_CAR|MINIVAN 4WD|10.5|15.5|.6|"TECH NOTES"| "WO NOTES"
JOTECH5|"INVALID CAT"|2020|GMC|SIERRA|4X4|TRIM-RED|REFERENCE-0000|2X|.3|1500|.5|PASS_CAR|MINIVAN 4WD|10.5|15.5|.6|"TECH NOTES"| "WO NOTES"
JOTECH6|"INVALID REPLACE PC"|2020|GMC|SIERRA|4X4|TRIM-RED|REFERENCE-0000|21|.X|1500|.5|PASS_CAR|MINIVAN 4WD|10.5|15.5|.6|"TECH NOTES"| "WO NOTES"

Current Execution Schedule

This i-frame displays the current execution schedule for this interface. Current and previously scheduled runs display the ID, Description, Status, Scheduled Date, Last Run Date, Frequency, Exclude Holidays, Submitted By and Run Desc fields.



Schedule Details



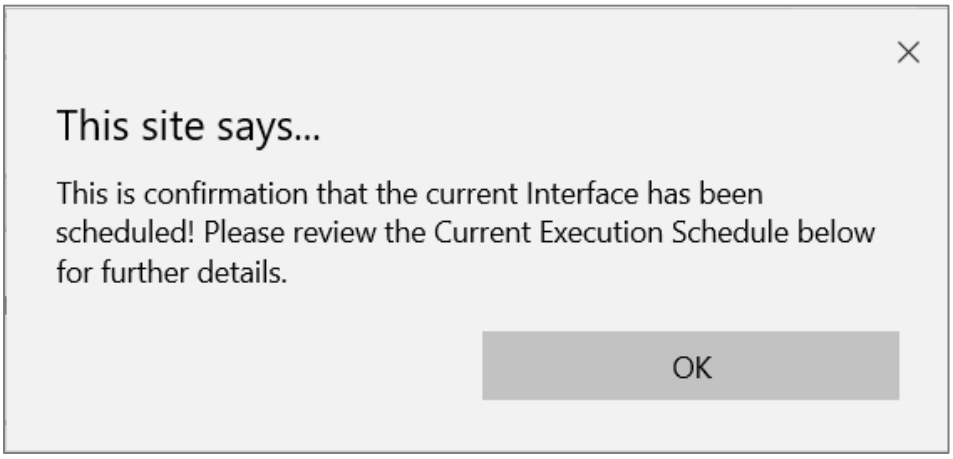
To schedule the interface, enter schedule details.

1. Select the run interval (Once, Minutes, Hours, Days, Months).
    - If only running one time, currently, you can select **Once**, then select the **Schedule/Reschedule** button.

- If you select Minutes, Hours, Days, or Months, enter a value for the interval in the **Run Interval** field that displays after the selection is made.

2. If you would like to exclude weekends and holidays from the run, select the **Exclude Weekends and Holidays** checkbox.
3. Enter a **First Execution Date/Time** from which the run interval value should apply.
4. When finished, select the **Schedule/Reschedule** button.

You will receive the following message:



The scheduled run appears on the **Current Execution** i-frame. It can also be viewed on the **System Run List of Jobs** frame.

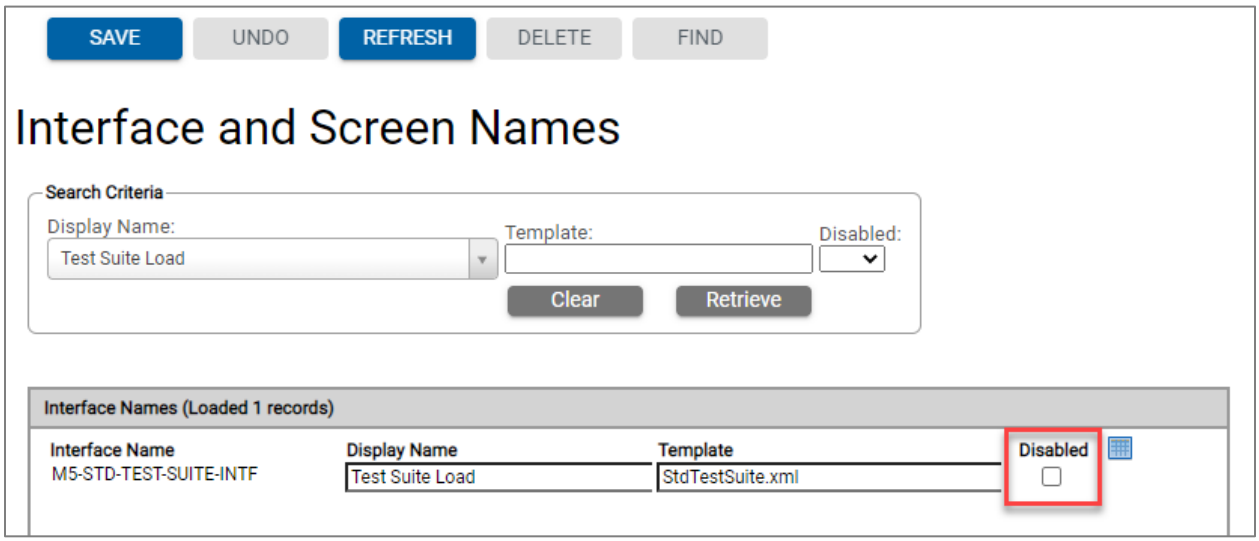
To view interface rejects, refer to the **Interface Reject Manager** frame.

7. Test Suite Load

The Test Suite Load interface provides users with a method to enter large amounts of test suite data using M5's standard interface functionality and does not require expanded licensing.

Interface and Screen Names

Before you can run the interface, you must make sure the interface is enabled for use.



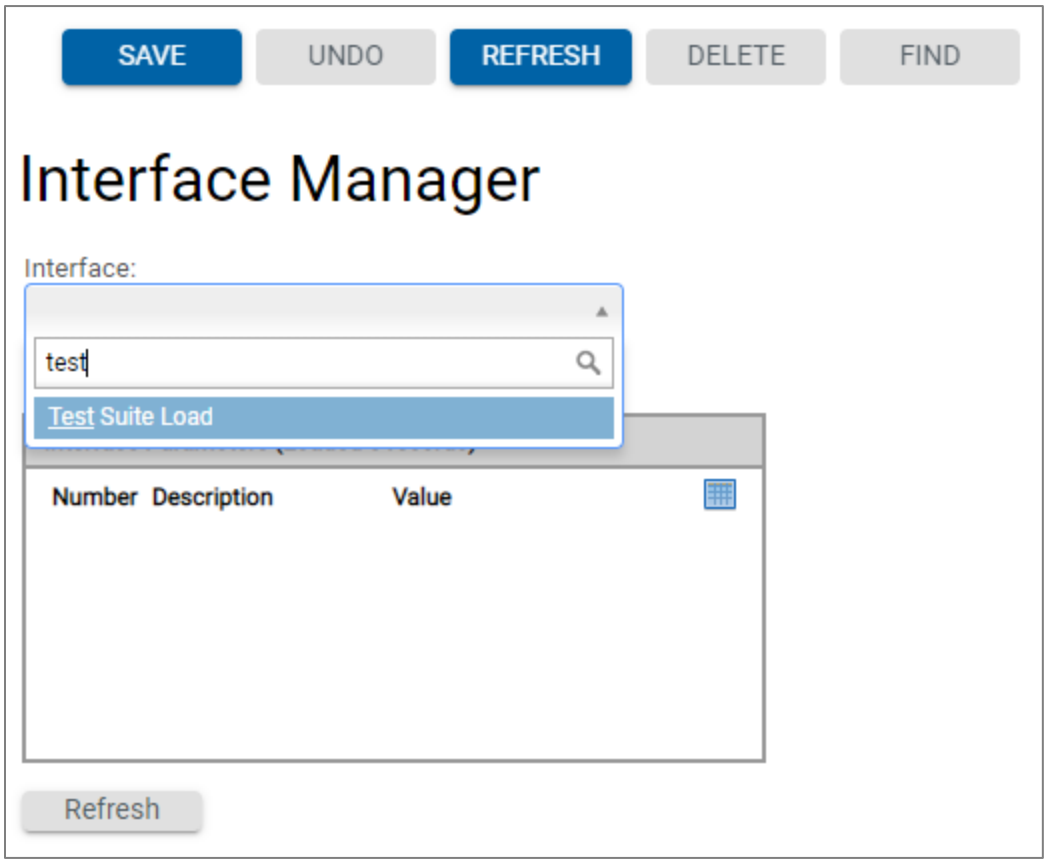
To verify:

1. Navigate to the **Interface and Screen Names** frame.
2. Scroll the list until you find: **M5-STD-TEST-SUITE-INTF** on the list. Alternatively, you can search for the interface in the **Display Name** dropdown and select the **Retrieve** button.
3. Make sure the **Disabled** checkbox is cleared.
4. If it is selected and you want to run the interface, clear the checkbox and select **SAVE**.

Interface Manager

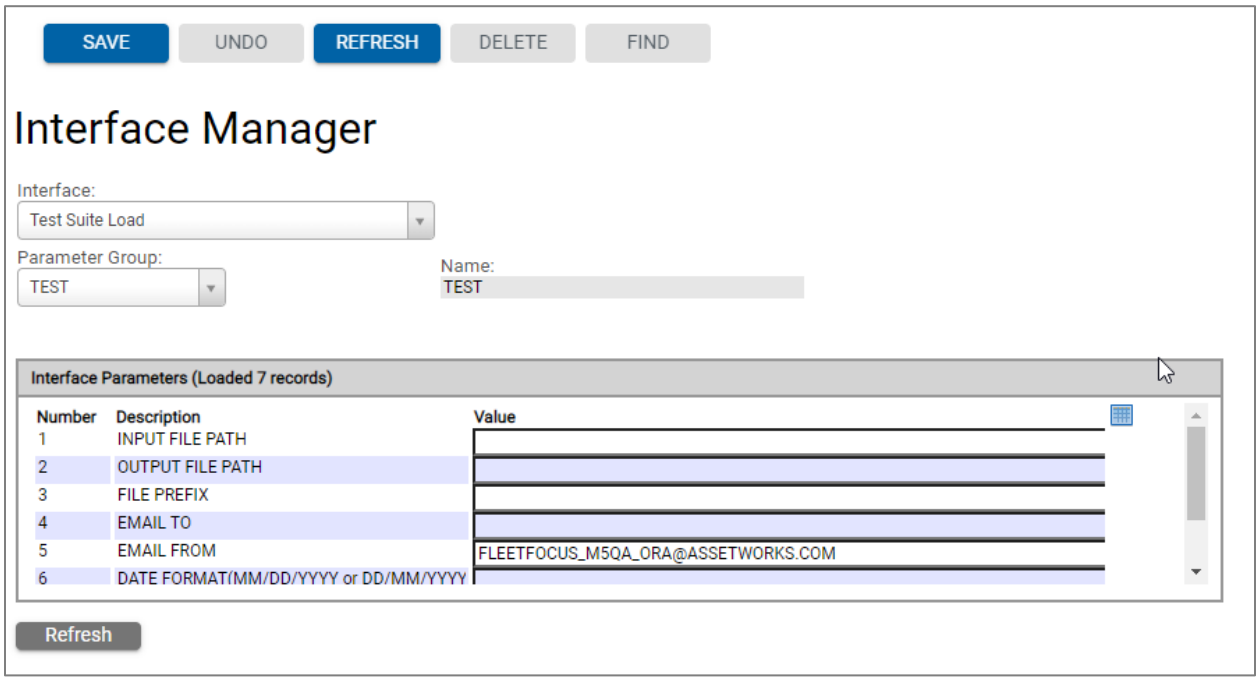
After verifying that the interface is enabled for use, navigate to the **Interface Manager** frame. To locate the interface, select from the dropdown list or enter the name.

After you select the interface from the dropdown, the Interface Parameters, Current Execution Schedule, and Schedule Details display.



- You can select an existing **Parameter Group** from the dropdown.
- If this is your first time using the interface, the only option will be NEW. You can use this option to create and save a new parameter group for future use.
- To create a new group, select NEW from the dropdown, enter a name in the **Name** field, define parameter values (explanations below), and select the **SAVE** button.
- You can also run the interface without saving your parameters.

Interface Parameters



Interface Parameter Explanations

Parameter Name	Description	Required (Y/N)
INPUT FILE PATH	File path where the input file will be found by the interface program. Note: This path refers to the C: drive on the batch server. The directory name should not end with a "\", and can either be a mapped drive (C:, Q:, etc.) or with a \\server name\share\directory format. The interface will process any files found in this directory with a .csv extension.	Y
OUTPUT FILE PATH	File path where the file will be moved upon completion of the interface. Note: This path refers to the C: drive on the batch server. The directory name should not end with a "\", and can either be a mapped drive (C:, Q:, etc.) or with a \\server name\share\directory format. The file is renamed with the date and time. For example, a file named WODATA.csv will be renamed as WODATAyyyymmddhhmmss.csv where yyyymmdd represents year/month/day and hhmmss represents hour/minutes/seconds.	Y
FILE PREFIX	This is an optional parameter that allows you to specify a part of the file name that will be added to the beginning of each processed file as a prefix.	N
EMAIL TO	User or Account to whom any email updates will be sent upon about the interface run. If you need multiple emails to receive these notifications, it is recommended to create a distribution group on the mail server that consists of those email addresses. Completion emails will include a count of good and bad records. The email will also include a list of files processed by the interface run.	Y

Parameter Name	Description	Required (Y/N)
EMAIL FROM	User or Account from whom the email originates - default will be determined by the M5 Parameter values **FROM_EMAIL_NAME** and **CE_EMAIL_DOMAIN.** If this parameter is set to INTERFACE@ASSETWORKS.COM or left blank, the default option above will be used to construct the email address. If the parameter contains any other value, that entry will be used as the EMAIL FROM address.	N
DATE FORMAT (MM/DD/YYY or DD/MM/YYYY)	This parameter allows you to determine which of the two formats the incoming date will be in. If left blank, the default is MM/DD/YYY.	N
FILE TYPE (C,F,P,S,T,X)	Input file type (F = Fixed length, C = Comma delimited, V = Pipe (vertical bar), S = semicolon delimited, T = tab delimited, X = XML). C is the default value.	Y

Test Suite Sample Data

The following is a list of sample data that illustrates what the data would look like within the various file format input files to be processed by the interface.

XML

```
<TESTSUITES>
     <TESTSUITE>
          <RECORD_TYPE>1</RECORD_TYPE>
          <TEST_SUITE_NAME>FMV-23395 TS</TEST_SUITE_NAME>
          <TEST_SUITE_DESCRIPTION>Test Suite for FMV-23395</TEST_SUITE_DESCRIPTION>
          <NEXT_TO_PERFORM/>
          <LINKED_TEST_SUITE/>
          <CORRECTIVE_JOB_CODE_H>01-01-001</CORRECTIVE_JOB_CODE_H>
          <CORRECTIVE_JOB_REASON_H>P</CORRECTIVE_JOB_REASON_H>
          <CORRECTIVE_JOB_PRIORITY_H/>
          <ALLOW_OVERRIDE>N</ALLOW_OVERRIDE>
          <SMARTAPPS_CHECKLIST>N</SMARTAPPS_CHECKLIST>
          <ENFORCE_SIGNATURE>N</ENFORCE_SIGNATURE>
        <AVAILABLE_ON_DIRECT_TEST_SUITE_ENTRY>Y</AVAILABLE_ON_DIRECT_TEST_SUITE_ENTRY>
          <SHOW_ON_VEHICLE_SAFETY_QUERY>N</SHOW_ON_VEHICLE_SAFETY_QUERY>
          <SEQUENCE_NO/>
          <ENTRY_LABEL>Test Row 1</ENTRY_LABEL>
          <ID_NO/>
          <ENTRY_DESCRIPTION>Character test</ENTRY_DESCRIPTION>
          <GROUP_HEADER/>
          <SUBSECTION/>
          <DATA_TYPE>CHARACTER</DATA_TYPE>
          <MIN_VAL/>
          <MAX_VAL/>
          <IN_RANGE_ONLY>N</IN_RANGE_ONLY>
          <ALLOW_NA>N</ALLOW_NA>
          <VALUE_REQUIRED>N</VALUE_REQUIRED>
          <OVERRIDE_JOB>N</OVERRIDE_JOB>
          <CORRECTIVE_JOB_CODE_L/>
          <CORRECTIVE_JOB_REASON_L/>
          <CORRECTIVE_JOB_PRIORITY_L/>
          <INFO_ONLY>Y</INFO_ONLY>
          <SPAWN_JOB>N</SPAWN_JOB>
          <FAULT_CODE>N</FAULT_CODE>
```

```
      <DEFAULT_FAULT_CODE>N</DEFAULT_FAULT_CODE>
      <CANNOT_BE_DRIVEN>N</CANNOT_BE_DRIVEN>
      <ATTACHMENT_REQUIRED>N</ATTACHMENT_REQUIRED>
      <DISABLED_FL>N</DISABLED_FL>
      <USER_INST_SEQ/>
      <USER_INSTRUCTIONS>Test User Instructions 2</USER_INSTRUCTIONS>
      <SEND_FAIL_NOTIFICATION_FL>N</SEND_FAIL_NOTIFICATION_FL>
      <NOTE_REQ/>
      <FAIL_NOTE_REQ/>
</TESTSUITE>
<TESTSUITE>
      <RECORD_TYPE>2</RECORD_TYPE>
      <TEST_SUITE_NAME>FMV-23395 TS</TEST_SUITE_NAME>
      <TEST_SUITE_DESCRIPTION/>
      <NEXT_TO_PERFORM/>
      <LINKED_TEST_SUITE/>
      <CORRECTIVE_JOB_CODE_H/>
      <CORRECTIVE_JOB_REASON_H/>
      <CORRECTIVE_JOB_PRIORITY_H/>
      <ALLOW_OVERRIDE/>
      <SMARTAPPS_CHECKLIST/>
      <ENFORCE_SIGNATURE/>
      <AVAILABLE_ON_DIRECT_TEST_SUITE_ENTRY/>
      <SHOW_ON_VEHICLE_SAFETY_QUERY/>
      <SEQUENCE_NO/>
      <ENTRY_LABEL>Test Row 2</ENTRY_LABEL>
      <ID_NO/>
      <ENTRY_DESCRIPTION>Numeric test</ENTRY_DESCRIPTION>
      <GROUP_HEADER/>
      <SUBSECTION/>
      <DATA_TYPE>NUMERIC</DATA_TYPE>
      <MIN_VAL/>
      <MAX_VAL/>
      <IN_RANGE_ONLY>Y</IN_RANGE_ONLY>
      <ALLOW_NA>N</ALLOW_NA>
      <VALUE_REQUIRED>N</VALUE_REQUIRED>
      <OVERRIDE_JOB>N</OVERRIDE_JOB>
      <CORRECTIVE_JOB_CODE_L/>
      <CORRECTIVE_JOB_REASON_L/>
      <CORRECTIVE_JOB_PRIORITY_L/>
      <INFO_ONLY>N</INFO_ONLY>
      <SPAWN_JOB>N</SPAWN_JOB>
      <FAULT_CODE>N</FAULT_CODE>
```

```
            <DEFAULT_FAULT_CODE>N</DEFAULT_FAULT_CODE>
            <CANNOT_BE_DRIVEN>N</CANNOT_BE_DRIVEN>
            <ATTACHMENT_REQUIRED>N</ATTACHMENT_REQUIRED>
            <DISABLED_FL>N</DISABLED_FL>
            <USER_INST_SEQ/>
            <USER_INSTRUCTIONS>Test User Instructions 2</USER_INSTRUCTIONS>
            <SEND_FAIL_NOTIFICATION_FL>Y</SEND_FAIL_NOTIFICATION_FL>
            <NOTE_REQ>Y</NOTE_REQ>
            <FAIL_NOTE_REQ>Y</FAIL_NOTE_REQ>
        </TESTSUITE>
</TESTSUITES>
```

Delimited Format

```
2,FMV-23395 TS,Test Suite for FMV-23395,,,01-02-001,P,,N,N,N,Y,N,1,Test Row
1,,Character test,,,CHARACTER,,,N,N,N,N,,,,Y,N,N,N,N,N,N,,Test User Instructions 1,Y,,
2,FMV-23395 TS,,,,,,,,,,,,,Test Row 2.1,,Numeric
test,,,NUMERIC,,,N,N,N,N,,,,N,N,N,N,N,N,N,,Test User Instructions 2,N,Y,N
```

Test Suite File Data

Field Name	XML File Tags	Starting Position for fixed file (no delimiter)	Data Length fixed file (no delimiter)	Delimited File Position	Data Type	Logic Associated	Destination Table/Column	Notes
Record Type	<RECORD _TYPE>	1	1	1	Numeric	1 = New Entry, 2 = Update, 3 = Disable Entire Test Suite	N/A	User must identify record type for data to be processed. 3 disables the test suite at the header level and ignores all other data/changes.
Test Suite Name	<TEST _SUITE _NAME>	2	50	2	VARCHAR 2 (50 CHAR)	Required for all Record Types. For Update /Disable (2/3), value must exist on the TESTSUITE _MASTER table to derive TESTSUITE_ID	TESTSUITE _MASTER. NAME	Required for ALL Record types (1, 2, or 3). Update actions will take place regardless of current status (Disabled or Enabled). Update actions will enable disabled Test Suites. Clients wishing to update a Test Suite, but leave it disabled at the header level must enter a 2 action in the file for the same test suite and a subsequent 3 action to disable it. Entering an update action for a disabled Test Suite will enable it.

Test Suite Description	<TEST _SUITE_ DESCRIPTION >	52	50	3	VARCHAR 2 (50 CHAR)	Required for creating new records, otherwise optional. If left blank (null) on an UPDATE record (type 2), no changes to Description will be processed.	TESTSUITE _MASTER. DESCRIPTION	
Next To Perform	<NEXT_TO_ PERFORM>	102	50	4	VARCHAR 2 (50 CHAR)	If a value is entered, validate against TESTSUITE _MASTER. NAME to derive TESTSUITE_ID value.	TESTSUITE _MASTER.NEXT_ TESTSUITE_ID	
Linked Test Suite	<LINKED _TEST _SUITE>	152	50	5	VARCHAR 2 (50 CHAR)	If a value is entered, validate against TESTSUITE _MASTER. NAME to derive TESTSUITE_ID value.	TESTSUITE_ MASTER.LINK _TO_ID	
Corrective Job Code (Header)	<CORRECTIVE _JOB_CODE _H>	202	10	6	VARCHAR 2 (10 CHAR)	Required for new entries. Update actions will ignore this data if null, or change the data to match, if populated. Must be a valid Job Code following user setup.	TESTSUITE _MASTER .CORRECTIVE _JOB	

Corrective Job Reason (Header)	<CORRECTIVE_JOB_REASON_H>	212	1	7	CHAR (1 BYTE)	Required for new entries. Update actions will ignore this data if null, or change the data to match, if populated. Must be a valid Job Reason following user setup.	TESTSUITE_MASTER. CORRECTIVE_JOB_REASON	
Corrective Job Priority (Header)	<CORRECTIVE_JOB_PRIORITY_H>	213	5	8	NUMBER (5,0)	Not Required. Value will be CLEARED if left null on an Update action.	TESTSUITE_MASTER. CORRECTIVE_JOB_PRIORITY	
Allow Override	<ALLOW_OVERRIDE>	218	1	9	CHAR (1 BYTE)	Valid values are Y/N/null. When value = Y/N, set appropriately (new record or updated). If this value is null, ignore.	TESTSUITE_MASTER. OVERRIDE_FL	
SmartApps Checklist	<SMARTAPPS_CHECKLIST>	219	1	10	CHAR (1 BYTE)	Valid values are Y/N/null. When value = Y/N, set appropriately (new record or updated). If this value is null, ignore.	TESTSUITE_MASTER. INSPECTION_FL	

Enforce Signature	<ENFORCE _SIGNATURE>	220	1	11	CHAR (1 BYTE)	Valid values are Y/N/null. When value = Y/N, set appropriately (new record or updated). If this value is null, ignore.	TESTSUITE _MASTER. ENFORCE _CERT_SIG_FL	
Available on Direct Test Suite Entry	<AVAILABLE_ ON_DIRECT _TEST_SUITE _ENTRY>	221	1	12	VARCHAR 2 (1 CHAR)	Valid values are Y/N/null. When value = Y/N, set appropriately (new record or updated). If this value is null, ignore.	TESTSUITE_ MASTER.AVL _ON_DIRECT_ TESTSUITE_FL	
Show on Vehicle Safety Query	<SHOW_ON_ VEHICLE _SAFETY _QUERY>	222	1	13	VARCHAR 2 (1 CHAR)	Valid values are Y/N/null. When value = Y/N, set appropriately (new record or updated). If this value is null, ignore.	TESTSUITE_ MASTER.SHOW _ON_VEH_SAFE _QUERY_FL	
Sequence Number	<SEQUENCE _NO>	223	3	14	NUMBER (3,0)	Required and Validated for Update, only.	TESTSUITE _ENTRY.SEQ	If a NEW transaction (Record Type = 1) this value will be auto-populated by the component (each additional entry record will be added to the end of the existing sequence).

Entry Label	<ENTRY _LABEL>	226	100	15	VARCHAR 2 (100 CHAR)	Required to be unique by Test Suite.	TESTSUITE _ENTRY.LABEL	
ID Number	<ID_NO>	326	10	16	VARCHAR 2 (10 CHAR)	Free text. Special characters are possible.	TESTSUITE _ENTRY.ID_NO	
Entry Description	<ENTRY_ DESCRIPTION >	336	150	17	VARCHAR 2 (150 CHAR)	Free text. Special characters are possible.	TESTSUITE _ENTRY. DESCRIPTION	
Group Header	<GROUP_ HEADER>	486	1	18	VARCHAR 2 (1 CHAR)	Valid values are Y/N/null. When value = Y/N, set appropriately (new record or updated). If this value is null, ignore.	TESTSUITE _ENTRY.GROUP _HEADER_FL	
Subsection	<SUBSECTION >	487	10	19	VARCHAR 2 (10 CHAR)	Not Required. Values must be valid, if entered. Validate against SUBSECTION_ CODE. SUBSECTION. Value will be CLEARED if left null on an Update action.	TESTSUITE _ENTRY. SUBSECTION	

Data Type	<DATA_TYPE>	497	10	20	VARCHAR 2 (10 CHAR)	Value required. Valid values are numeric and Translate as follows: 1 = CHARACTER 2 = NUMERIC 3 = Y/N 4 = DATE 5 = M5 DATA 6 = NONE	TESTSUITE _ENTRY. DATATYPE	
Min Value	<MIN_VAL>	507	20	21	VARCHAR 2 (20 CHAR)	Value required to match data type (Y/N, Numeric)	TESTSUITE _ENTRY.MIN _VAL	
Max Value	<MAX_VAL>	527	20	22	VARCHAR 2 (20 CHAR)	Value required to match data type (Y/N, Numeric)	TESTSUITE _ENTRY.MAX _VAL	
In Range Only	<IN_RANGE _ONLY>	547	1	23	CHAR (1 BYTE)	Valid values are Y/N/null. When value = Y/N, set appropriately (new record or updated). If this value is null, ignore.	TESTSUITE _ENTRY.IN_RAN GE_ONLY_FL	

Allow NA	<ALLOW_NA>	548	1	24	CHAR (1 BYTE)	Valid values are Y/N/null. When value = Y/N, set appropriately (new record or updated). If this value is null, ignore.	TESTSUITE_ENTRY. ALLOW_NA_FL	
Value Required	<VALUE_ REQUIRED>	549	1	25	CHAR (1 BYTE)	Valid values are Y/N/null. When value = Y/N, set appropriately (new record or updated). If this value is null, ignore.	TESTSUITE_ENTRY. REQUIRED_FL	
Override Job	<OVERRIDE _JOB>	550	1	26	CHAR (1 BYTE)	Valid values are Y/N/null. When value = Y/N, set appropriately (new record or updated). If this value is null, ignore.	TESTSUITE_ENTRY. OVERRIDE_FL	
Corrective Job Code (Line)	<CORRECTIVE _JOB_CODE _L>	551	10	27	VARCHAR 2 (10 CHAR)	Must be valid Job code, if entered. If value is NULL on update action, value will be CLEARED.	TESTSUITE_ENTRY. CORRECTIVE _JOB	

Corrective Job Reason (Line)	<CORRECTIVE_JOB_REASON_L>	561	10	28	VARCHAR2 (10 CHAR)	Must be valid Job Reason, if entered. If value is NULL on update action, value will be CLEARED.	TESTSUITE_ENTRY.CORRECTIVE_JOB_REASON	
Corrective Job Priority (Line)	<CORRECTIVE_JOB_PRIORITY_L>	571	5	29	NUMBER (5,0)	Must be valid Priority, if entered. If value is NULL on update action, value will be CLEARED.	TESTSUITE_ENTRY.CORRECTIVE_JOB_PRIORITY	
Info Only	<INFO_ONLY>	576	1	30	CHAR (1 BYTE)	Valid values are Y/N/null. When value = Y/N, set appropriately (new record or updated). If this value is null, ignore.	TESTSUITE_ENTRY.INFO_ONLY	
Spawn Job	<SPAWN_JOB>	577	1	31	CHAR (1 BYTE)	Valid values are Y/N/null. When value = Y/N, set appropriately (new record or updated). If this value is null, ignore.	TESTSUITE_ENTRY.SPAWN_JOB	

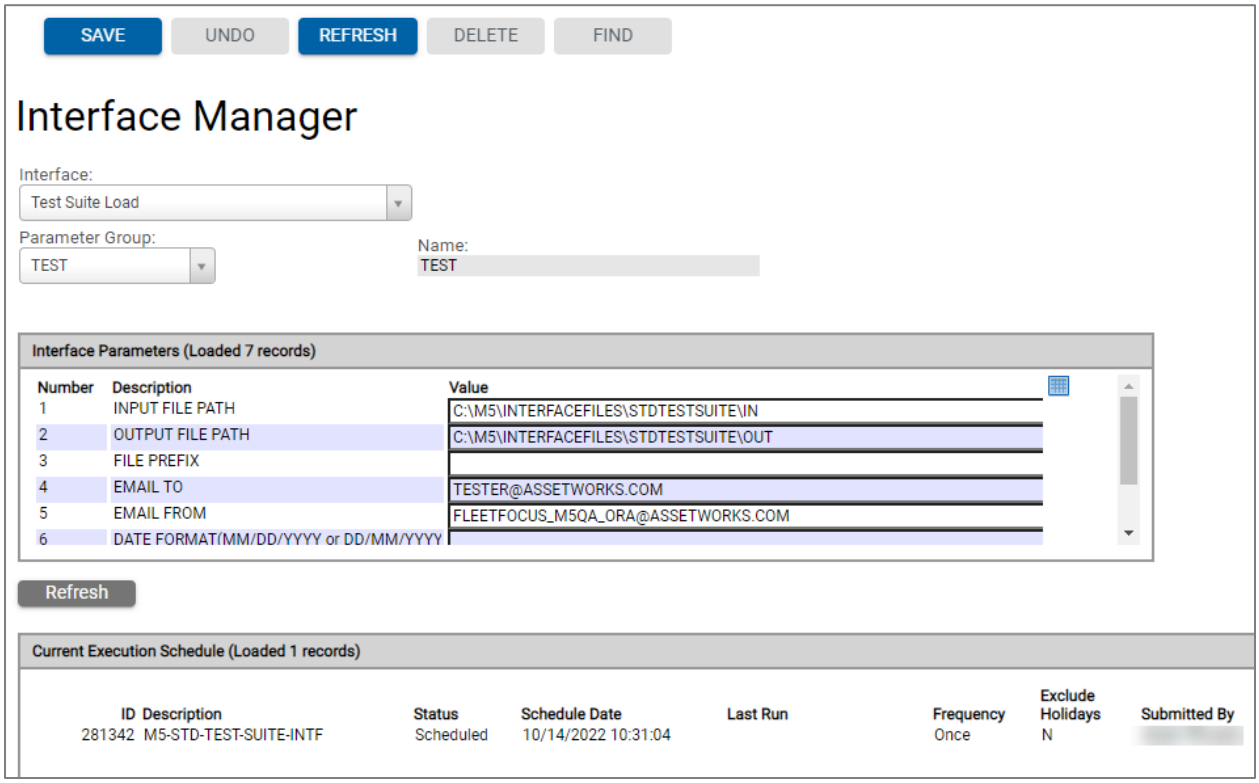
Fault Code	<FAULT _CODE>	578	1	32	CHAR (1 BYTE)	Valid values are Y/N/null. When value = Y/N, set appropriately (new record or updated). If this value is null, ignore.	TESTSUITE _ENTRY.FAULT _CODE_FL	
Default Fault Code	<DEFAULT _FAULT _CODE>	579	1	33	CHAR (1 BYTE)	Valid values are Y/N/null. When value = Y/N, set appropriately (new record or updated). If this value is null, ignore.	TESTSUITE _ENTRY. DEFAULT_FAULT _CODE_FL	
Cannot Be Driven	<CANNOT_BE_ DRIVEN>	580	1	34	CHAR (1 BYTE)	Valid values are Y/N/null. When value = Y/N, set appropriately (new record or updated). If this value is null, ignore.	TESTSUITE _ENTRY. CANNOT_BE _DRIVEN_FL	
Attachment Required	<ATTACHMENT _REQUIRED>	581	1	35	CHAR (1 BYTE)	Valid values are Y/N/null. When value = Y/N, set appropriately (new record or updated). If this value is null, ignore.	TESTSUITE _ENTRY.ATTACH _FL	

Disable Line	<DISABLED _FL>	582	1	36	VARCHAR 2 (1 CHAR)	Valid values are Y/N/null. When value = Y/N, set appropriately (new record or updated). If this value is null, ignore.	TESTSUITE _ENTRY. DISABLED_FL	
Instructions Sequence	<USER_INST _SEQ>	583	3	37	NUMBER (3,0)	Required to update existing row for Update option. New option will always try to populate a new row	TESTSUITE _USER _INSTRUCTION. SEQ	For Update transactions (Record Type = 2) If a value is provided, it will update the description as noted below. If no value is provided it will create a new row. For NEW transaction (Record Type = 1) will create a new row if instructions are included.
User Instructions	<USER_ INSTRUCTIONS >	586	250	38	VARCHAR 2 (250 CHAR)	Free text. Special characters are possible. If value is NULL on update action, value will be CLEARED.	TESTSUITE _USER _INSTRUCTION. DESCRIPTION	

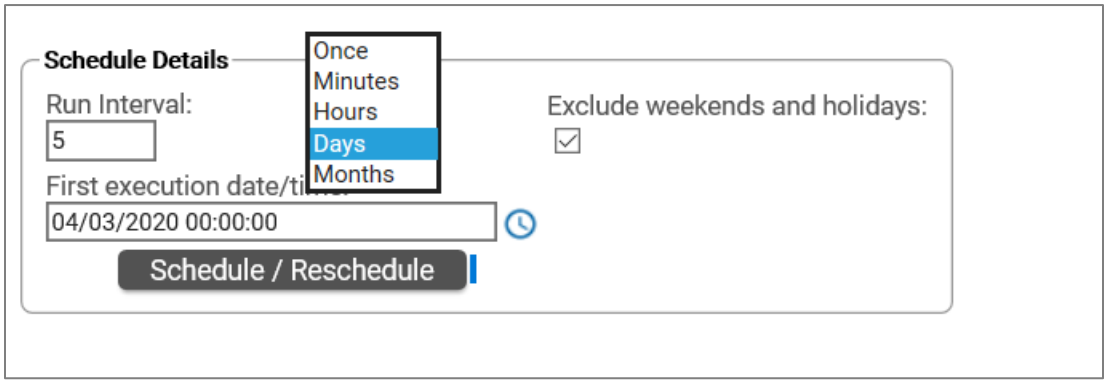
Send Fail Notification	<SEND_FAIL_NOTIFICATION_FL>	836	1	39	CHAR (1 BYTE)	Valid values are Y/N/null. When value = Y/N, set appropriately (new record or updated). If this value is null, for new record, it will be set to default Y, for updated record, ignore.	TESTSUITE_MASTER.SEND_FAIL_NOTIFICATION_FL	
Note Required	<NOTE_REQ>	837	1	40	CHAR (1 BYTE)	Valid values are Y/N/null. When value = Y/N, set appropriately (new record or updated). If this value is null, ignore.	TESTSUITE_ENTRY.NOTE_REQ_FL	
Failure Note Required	<FAIL_NOTE_REQ>	838	1	41	CHAR (1 BYTE)	Valid values are Y/N/null. When value = Y/N, set appropriately (new record or updated). If this value is null, ignore.	TESTSUITE_ENTRY.FAIL_NOTE_REQ_FL	

Current Execution Schedule

This i-frame displays the current execution schedule for this interface. Current and previously scheduled runs display the ID, Description, Status, Scheduled Date, Last Run Date, Frequency, Exclude Holidays, Submitted By and Run Desc fields.



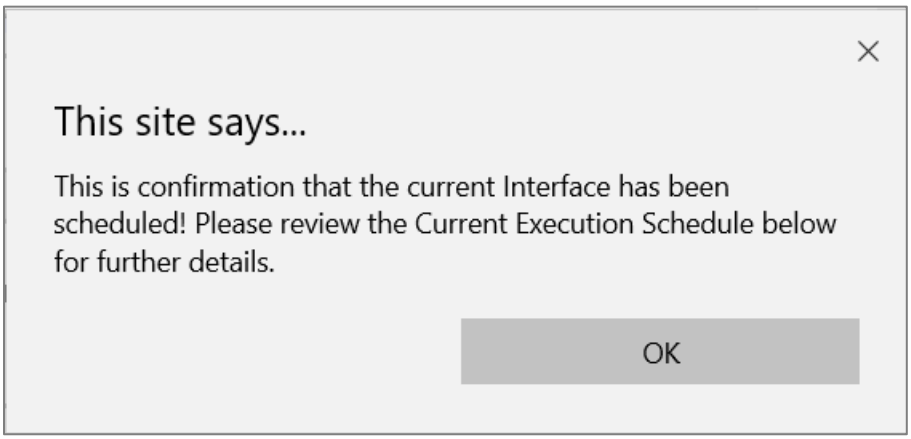
Schedule Details



To schedule the interface, enter schedule details.

1. Select the run interval (Once, Minutes, Hours, Days, Months).
    - If only running one time, currently, you can select **Once**, then select **Schedule/Reschedule** button.
    - If you select Minutes, Hours, Days, or Months, enter a value for the interval in the **Run Interval** field that displays after selection is made.
2. If you would like to exclude weekends and holidays from the run, select the **Exclude Weekends and Holidays** checkbox.
3. Enter a **First Execution Date/Time** from which the run interval value should apply.
4. When finished, select the **Schedule/Reschedule** button.

You will receive the following message:



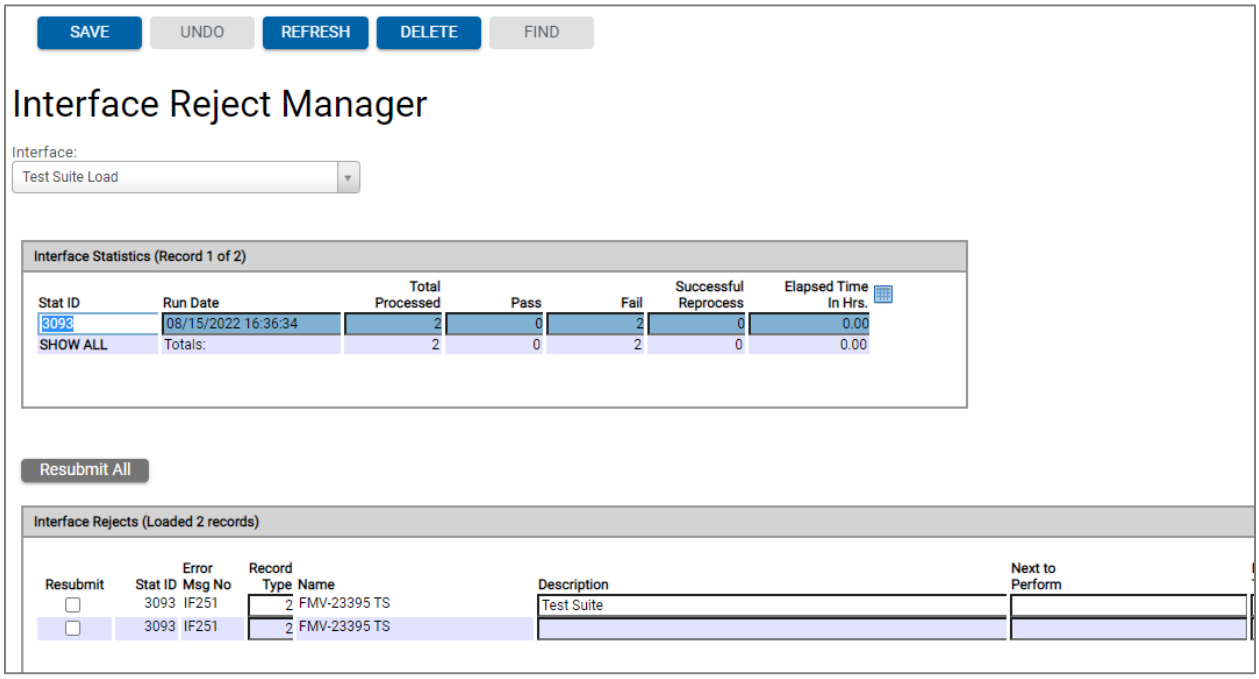
The scheduled run appears on the **Current Execution** i-frame. It can also be viewed on the **System Run List of Jobs** frame.

To view interface rejects, refer to the **Interface Reject Manager** frame.

Interface Reject Manager

To view rejects for the Test Suite Load Template interface, navigate to the **Interface Reject Manager** frame.

To locate the interface, select from the dropdown list or enter the name.



After selected, the **Interface Statistics** i-frame displays.

1. Select the **Stat ID** for the run you want to view and the **Interface Rejects** i-frame displays.
    - You can scroll to the bottom and select **Show All** in the last row to view all run statistics. However, there is a limit on how much data M5 can display at one time.
2. If an **Error Msg No.** is available, you can hover over it with your mouse to display the message.
3. After you have made the necessary corrections in M5, you can select the **Resubmit** checkbox for each record you want to resubmit.
4. You can delete records you do not want to correct or resubmit.
5. Select **SAVE** to reprocess the rejected records.

Error Processing

If a transaction record fails to process, the data transaction data (along with the error message) will be passed to the common FleetFocus M5 interface reject infrastructure.

The common FleetFocus M5 interface reject infrastructure includes interface statistic information (how many records processed, how may records failed, how many records were reprocessed, or how long did the interface run) as well as rejected transactions for each interface execution cycle.

8. Unit Load

The Unit Load Interface:

- Uses an Excel spreadsheet template that can be populated with data and converted to a .CSV file for processing by M5 to create new unit records.
- Can be used to update existing unit records on Unit Main.
- The Template assumes that all support codes and data references have been pre-defined and loaded into M5 (for example, MCC, Tech Spec, Departments, Locations).

Why:

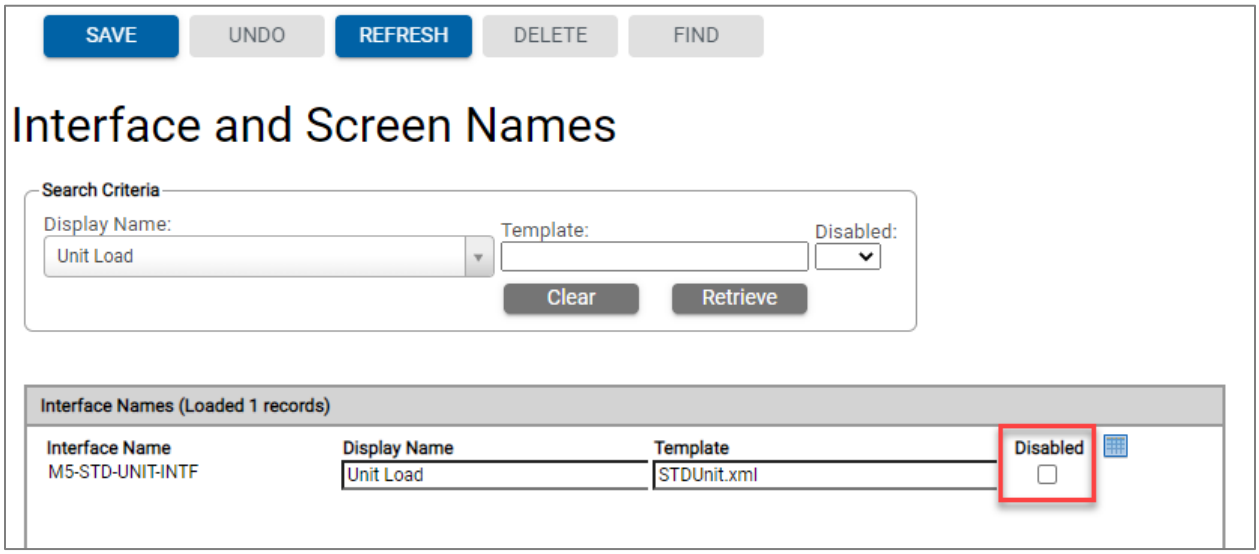
- Rather than update or create records one at a time, you can use this interface to update or create multiple records in one interface run.

How:

- The StandardUnitUpdateTemplate.xls file contains all data that will be processed by the interface for the unit records.
- Each row in the spreadsheet represents a single unit.
- You have the responsibility for loading all necessary record details into the spreadsheet and placing the spreadsheet in the correct file folder based on the input path defined above.
- All spreadsheet columns must remain in the order found in the default spreadsheet and in the order listed below, otherwise the Interface will fail.
- Do not delete, add, or move columns in spreadsheet.
- After the spreadsheet is populated, save the spreadsheet as a .CSV file (with a header row).
- Place the file in the directory identified in the Interface Manager Input File Path parameter field before scheduling the interface.

Interface and Screen Names

Before you can run the interface, you must make sure the interface is enabled for use.



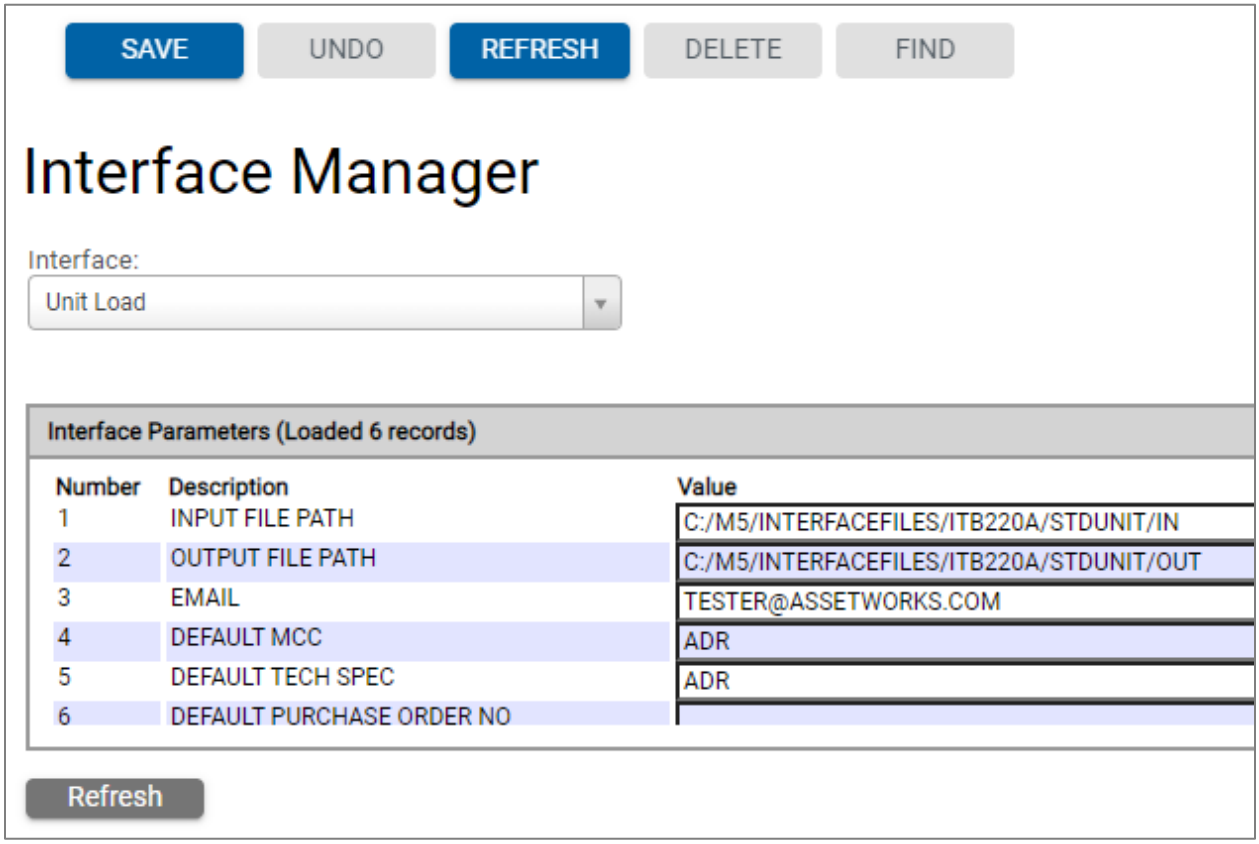
To verify:

1. Navigate to the Interface and Screen Names frame.
2. Scroll the list until you find: **M5-STD-UNIT-INTF** on the list.
3. Make sure the **Disabled** checkbox is cleared.
4. If it is selected and you want to run the interface, clear the checkbox and select **SAVE**.

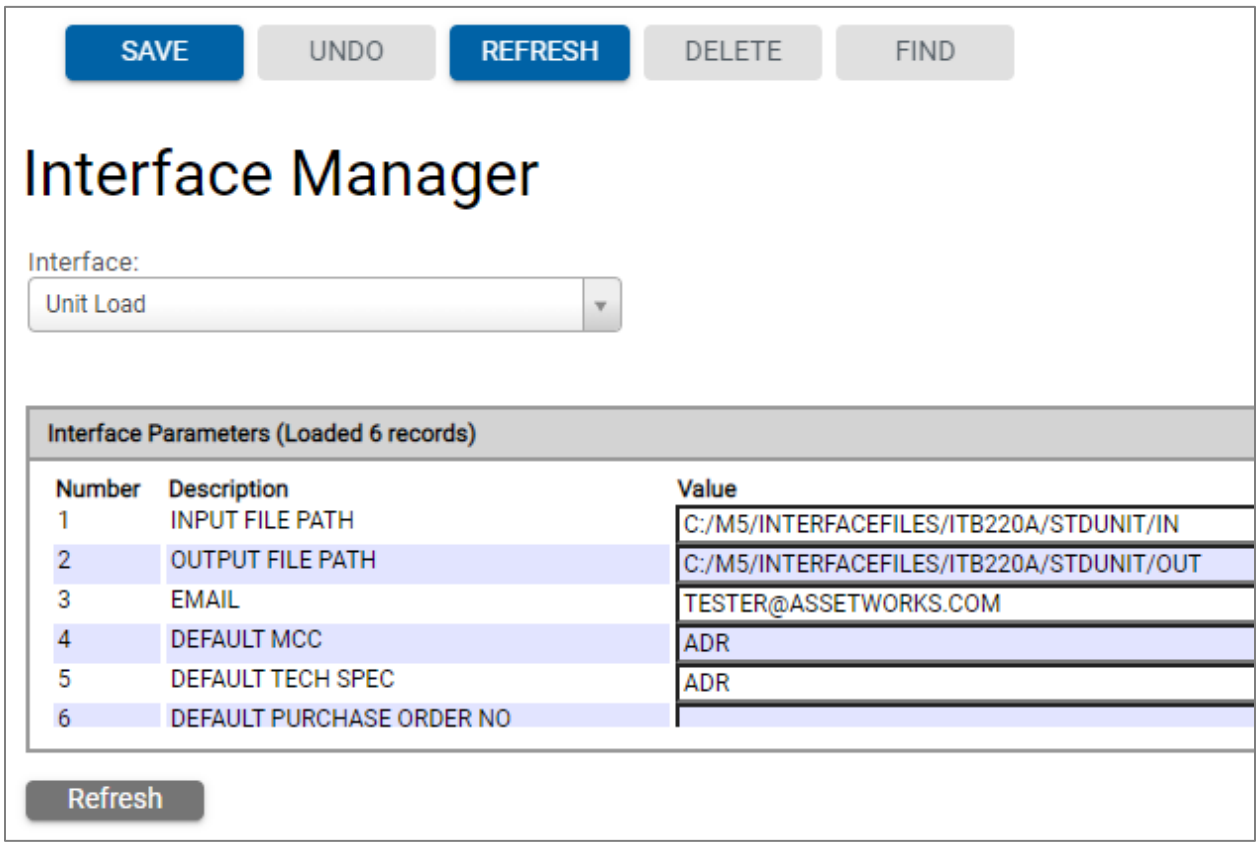
Interface Manager

After verifying that the interface is enabled for use, navigate to the **Interface Manager** frame. To locate the interface, select from the dropdown list or enter the name.

After you select the interface from the dropdown, Interface Parameters, Current Execution Schedule, and Schedule Details display.



Interface Parameters



- The most recent set of saved parameters load when the frame loads. Unlike some interface frames, you are not able to save different sets of parameters.
- To change any of the six values, enter the new information and select **SAVE**.

Interface Parameter Explanations

Parameter Name	Description	Required (Y/N)
INPUT FILE PATH	File path where the input file will be found. Note: This path refers to the C: drive on the batch server. The directory name should not end with a "\", and can either be a mapped drive (C:, Q:, etc.) or with a \\server name\share\directory format.	Y

Parameter Name	Description	Required (Y/N)
OUTPUT FILE PATH	File path where the file will be moved upon completion of the interface. Note: This path refers to the C: drive on the batch server. The directory name should not end with a “\”, and can either be a mapped drive (C:, Q:, etc.) or with a \\server name\share\directory format.	Y
EMAIL	User to whom an email updates will be sent upon about the interface run.	Y
DEFAULT MCC	• The default MCC will be loaded to all units in the file without an MCC being assigned. • If a value is entered in the MCC column of the .XLS file, this value will be assigned to the record no matter what the parameter value is set to. • If no value is entered in the MCC column of the .XLS file and a default MCC parameter is entered, the parameter value will be applied to the record. • If no value is in the MCC column and the MCC parameter is null, the record will fail. • All MCC codes must be loaded in M5 on the MCC Main frame for the interface to process successfully.	Y
DEFAULT TECH SPEC	• The default Tech Spec that will be loaded to all units in the file without a Tech Spec assigned. • If a value is entered in the Tech Spec column of the .XLS file, this value will be assigned to the record no matter what the parameter value is set to. • If no value is entered in the Tech Spec column of the .XLS file and a default Tech Spec parameter is entered, the parameter value will be applied to the record. • If no value is in the Tech Spec column and the Tech Spec parameter is null, the record will fail. • All Tech Specs must be loaded in M5 on the Tech Spec Main frame for the interface to process successfully.	Y

Parameter Name	Description	Required (Y/N)
DEFAULT PURCHASE ORDER	• The default Unit Purchase Order number will be loaded to all units in the file without a Purchase Order number assigned only if the unit doesn't already exist in M5. • If a value is entered in the Purchase Order Number column of the .XLS file, this value will be assigned to the record no matter what the parameter value is set to. • If no value is entered in the Unit Purchase Order number column of the .XLS file and a default Unit Purchase Order number parameter is entered, the parameter value will be applied to the record. • If no value is in the Unit Purchase Order column and the Purchase Order number parameter is null, the record will fail. • All Unit Purchase Order numbers must be loaded in M5 on the Unit Purchase Order frame for the interface to process successfully.	Y

The interface creates a program log file useful in case of program failure. By default, it will be in the M5\Interface\Logs directory.

Template

- The UnitLoadTemplate.csv file contains all data that will be processed by the interface for the unit records. Contact M5 Customer Care for assistance with the .csv file.
- Each row in the spreadsheet represents a single unit.
- You have the responsibility for loading all necessary record details into the spreadsheet and placing the spreadsheet in the correct file folder based on the input path defined above.
- All spreadsheet columns must remain in the order found in the default spreadsheet and in the order listed below, otherwise the Interface will fail.
- Do not delete, add, or move columns in spreadsheet.
- After the spreadsheet is populated, save the spreadsheet as a .CSV file (with a header row).
- Place the file in the directory identified in the Interface Manager Input File Path parameter field before scheduling the interface.

Data

Required fields

The first nine columns in the spreadsheet are required fields (based on default flag settings) and must have values in each column.

Field	Format, Length	Validated Value Required	Notes
Unit Number	VarChar2, 10	N	Unique fleet number.
Serial No	VarChar2, 32	See Flags 1055 and 1056.	The unit's VIN or manufacturer's assigned serial number. System Flag 1055 = Y the field is required. Default = Y. System Flag 1056 = Y all values must be unique. Default = N.
MCC	VarChar2, 8	Y	The unit's assigned MCC. If blank, the default MCC entered in the Interface Manager Default MCC parameter will be loaded if populated.
Tech Spec	VarChar2, 13	Y	The unit's assigned Tech Spec. If blank, the default Tech Spec entered in the Interface Manager Default Tech Spec parameter will be loaded if populated. System Flag 1025 = Y then field is required. Default = Y
Billing Code	VarChar2, 8	Y	Valid billing code
Owning Department	VarChar2, 10	Y	The unit's assigned owning department number. Must be valid department.
Using Department	VarChar2, 10	Y	The unit's assigned using department number. Must be valid department.
Maintenance Location	VarChar2, 6	Y	Valid maintenance location. Must be checked as a maintenance location. System Flag 2010 = Y then field is required. Default = Y
Acquisition Date	Date	Y	The date the unit was acquired (will set unit status to "I"). Future dates not allowed.

Optional fields

The following fields are optional or by default are flagged as not required and can be populated if necessary.

Take note of system flag settings, if certain flags are changed from default settings these fields could become required.

Where Validated Value Required is Y, the user must first set up the reference code in M5 before running the interface.

Field	Format, Length	Validated Value Required	Notes
Alternate Unit Number	VarChar2, 10	N	An alternate unit number assigned to the unit.
Description	VarChar2, 40	N	A text description of the unit.
Activity Code	VarChar2, 8	Y	Valid activity code.
Attachment Serial No	VarChar2, 32	N	The manufacturer's assigned serial number of the primary auxiliary equipment attached to the unit (for example, generator, boom, lift-gate, refer unit).
Attachment Tech Spec	VarChar2, 13	Y	Valid technical specification of the primary auxiliary equipment, describing the type of attachment.
Parking Location	VarChar2, 6	Y	Valid location where the unit is based. Must be checked as a parking location.
Delivery Location	VarChar2, 6	Y	Valid Location where the new unit is to be delivered. Must be checked as a delivery location.
Fueling Location	VarChar2, 6	Y	Valid location where unit is primarily assigned to fuel. Must be checked as a fuel location.
Operator	VarChar2, 11	See System Flag 2010	Number or mnemonic of operator assigned to the vehicle. If System Flag 2010 = Y, Operator number must be a valid employee number. Default = N.

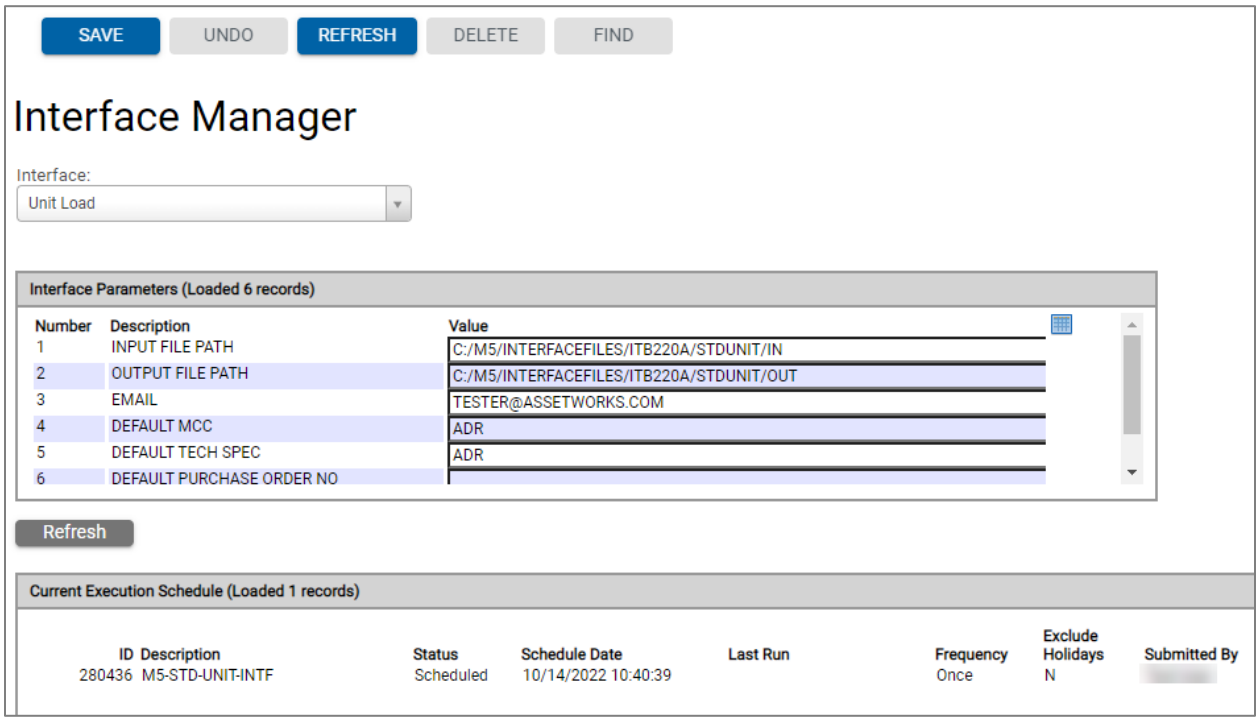
Field	Format, Length	Validated Value Required	Notes
Operator Name	VarChar2, 30	See System Flag 2010	Name of operator. If System Flag 2010 is set to validate operators, this field is automatically populated with the name of the assigned Operator from Employee Main. If not validated, this is general text name of the operator.
Shift	Number	Y	Valid vehicle shift. Must be designated as a non-employee shift.
User Class 1	VarChar2, 4	See System Flag 1181	Valid user class 1 code. System Flag 1181 = Y the field is required. Default = N.
User Class 2	VarChar2, 4	See System Flag 1182	Valid user class 2 code. System Flag 1182 = Y the field is required. Default = N.
User Class 3	VarChar2, 4	See System Flag 1183	Valid user class 3 code. System Flag 1183 = Y the field is required. Default = N.
User Class 4	VarChar2, 4	See System Flag 1184	Valid user class 4 code. System Flag 1184 = Y the field is required. Default = N.
User Class 5	VarChar2, 4	See System Flag 1185	Valid user class 5 code. System Flag 1185 = Y the field is required. Default = N.
Operational Class	VarChar2, 4	Y	Valid operation class code. Required if Unit Availability is to be used.
Acquisition Meter 1	Number	N	Meter 1 reading on date of acquisition.
Acquisition Meter 2	Number	N	Meter 2 reading on date of acquisition.
Arrival Date	Date	N	Date vehicle was delivered from manufacturer. Future dates not allowed.
In-Service Meter 1	Number	N	Meter 1 reading on date vehicle placed in-service.
In-Service Meter 2	Number	N	Meter 2 reading on date vehicle placed in-service.

Field	Format, Length	Validated Value Required	Notes
In-Service Date	Date	N	Date vehicle was placed in-service (Sets unit status = 'A'). Future dates not allowed.
Manufacture Date	Date	N	Date vehicle was completed by manufacturer. Future dates not allowed.
PO Number	VarChar2, 19	Y	If entered a valid Unit Purchase Order must be set up in M5. If blank, the default PO Number entered in the Interface Manager Default PO Number parameter will be loaded if populated.
Requisition Number	VarChar2, 10	N	Unit Requisition Number.
Purchase Price	Number	N	Total price paid for unit.
Markup Scheme		Y	Valid Markup scheme assigned to unit.
Title Number	VarChar2, 10	N	Unit's title number.
Asset Number	VarChar2, 12	N	Unit's fixed asset system asset number.
Asset Type	VarChar2, 10	N	Must be set to a value called UNIT.
Equipment Type	VarChar2, 6	N	Can leave null.
SKU	VarChar2, 30	N	Can leave null.
Equipment Condition	Number 5, 0	N	Can leave null.
Employee Owned Flag	Char,1	N	Can leave null.
Employee Owned ID	Number 10, 0	N	Can leave null.
Bin	VarChar2, 30	N	Not required
Owner Type	Char, 1	N	Unit owner type, O-Owned, L-Leases, R-Rented.
Lease Type	VarChar2, 20	N	Value must be a valid lease type or left blank.
Tax Exempt	Char, 1	N	Value must be Y or left blank.
Notes	VarChar2, 4000	N	Unit notes and can be left blank.

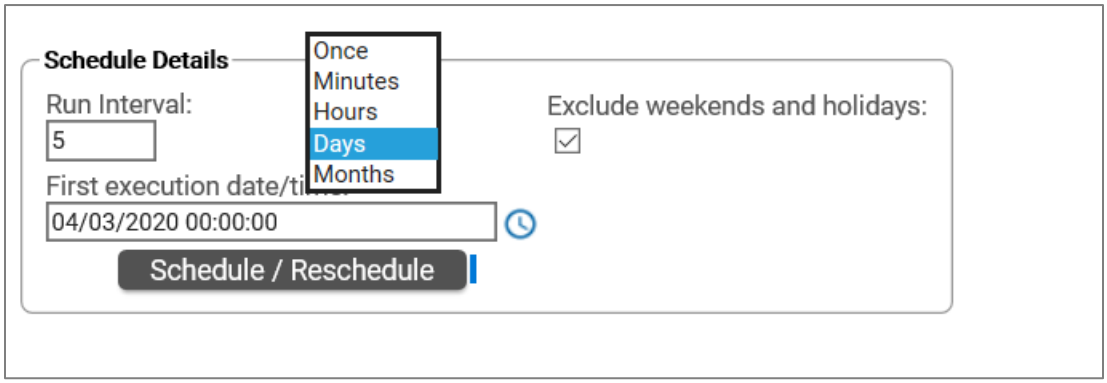
Field	Format, Length	Validated Value Required	Notes
WO Notes	VarChar2, 4000	N	Unit work order notes and can be left blank.

Current Execution Schedule

This i-frame displays the current execution schedule for this interface. Current and previously scheduled runs display the ID, Description, Status, Scheduled Date, Last Run Date, Frequency, Exclude Holidays, Submitted By and Run Desc fields.



Schedule Details



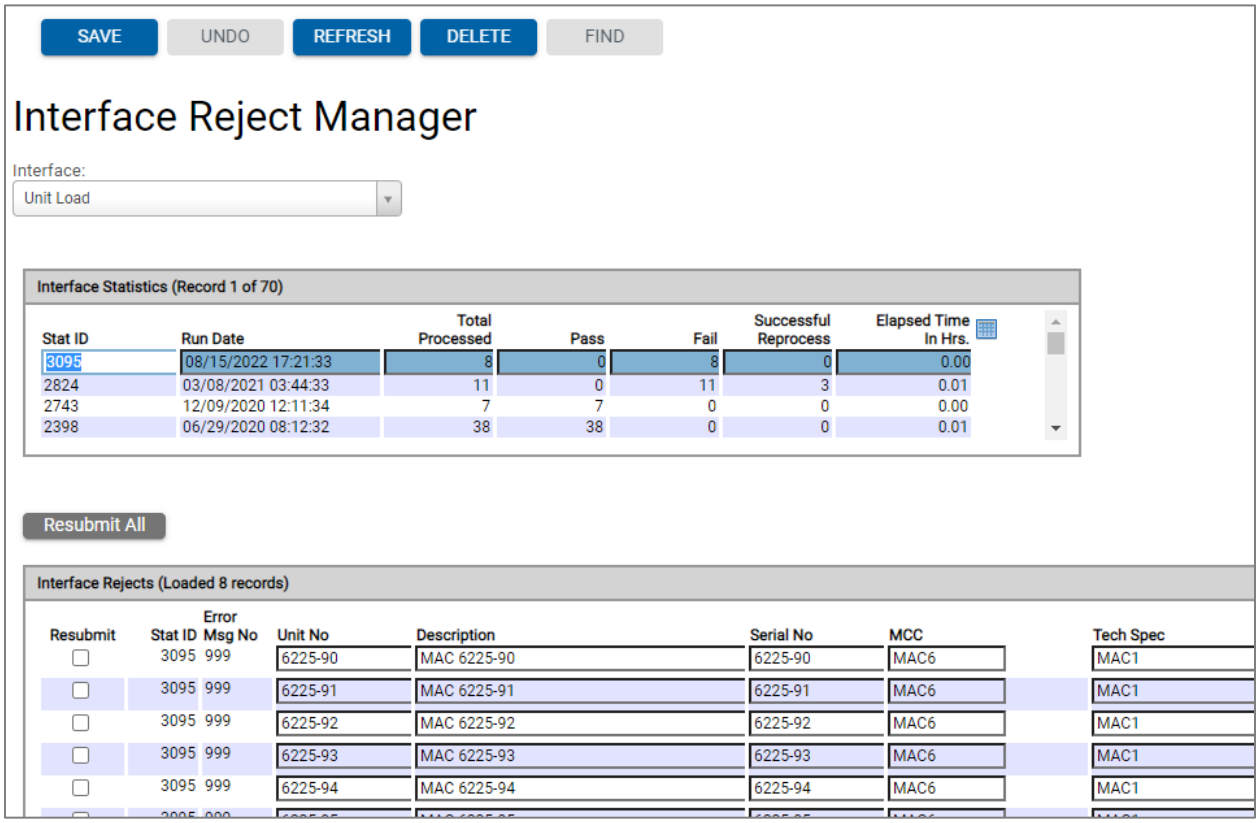
To schedule the interface, enter schedule details.

1. Select the run interval (Once, Minutes, Hours, Days, Months).
    - If only running one-time, currently, you can select **Once**, then select the **Schedule/Reschedule** button.
    - If you select Minutes, Hours, Days, or Months, enter a value for the interval in the **Run Interval** field that displays after selection is made.
2. If you would like to exclude weekends and holidays from the run, select the **Exclude Weekends and Holidays** checkbox.
3. Enter a **First Execution Date/Time** from which the run interval value should apply.
4. When finished, select the **Schedule/Reschedule** button.

Interface Reject Manager

To view rejects for the Unit Load interface, navigate to the **Interface Reject Manager** frame.

To locate the interface, select from the dropdown list or enter the name.



After selected, the **Interface Statistics** i-frame displays.

1. Select the **Stat ID** for the run you want to view and the **Interface Rejects** i-frame displays.
    - You can scroll to the bottom and select **Show All** in the last row to view all run statistics. However, there is a limit on how much data M5 can display at one time.
2. If an **Error Msg No.** is available, you can hover over it with your mouse to display the message.
3. After you have made the necessary corrections in M5, you can select the **Resubmit** checkbox for each record you want to resubmit.
4. You can also delete any records you do not want to fix or resubmit.
5. Select **SAVE** to reprocess the rejected records.

Error Processing

If a transaction record fails to process, the data transaction data (along with the error message) will be passed to the common FleetFocus M5 interface reject infrastructure.

The common FleetFocus M5 interface reject infrastructure includes interface statistic information (how many records processed, how may records failed, how many records were reprocessed, or how long did the interface run) as well as rejected transactions for each interface execution cycle.

Updates

Release	Section	Description
23.2	WO Transaction Template	Updated Position 9>Contact Name>Required field from N to Y.
23.2	WO Transaction Template	Added Position 23 – Job Symptom. This position is not used.
23.2	WO Transaction Template	Updated the description for the CLOSE WORK ORDER parameter.
23.2	6.Expanded Interface File Data	Added Employee Number to the Commercial Fuel Template and In-House Fuel Template.
24.0	All sections	Applied miscellaneous writing style updates throughout the document.
24.2	Interface Manager Template	Updated the content to contact M5 Customer Care for .csv file assistance.
24.3	7.Test Suite Load – File Data	Added Send Fail Notification.
24.3	7.Test Suite Load – File Data	Added Note Required and Failure Note Required.
24.3	7. Test Suite Load - Test Suite Sample Data	Added SEND_FAIL_NOTIFICATION, NOTE_REQ, and FAIL_NOTE_REQ to the XML format.