

Standard Unit Upload Interface

Quick Reference Guide

Version 24.x

Last Modified 24.2 | July 2024

Overview

The Standard Unit Upload 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 also be used to update existing unit records on Unit Main.
- The Template assumes that all support codes and data references have been pre-defined
- 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. 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.

Interface and Screen Names

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

SAVE UNDO REFRESH DELETE FIND

Interface and Screen Names

Interface Names (Record 400 of 576)

Interface Name	Display Name	Template	Disabled
			<input type="checkbox"/>
			<input type="checkbox"/>
			<input checked="" type="checkbox"/>
			<input type="checkbox"/>
			<input type="checkbox"/>
			<input type="checkbox"/>
			<input type="checkbox"/>
			<input checked="" type="checkbox"/>
M5-STD-UNIT-INTF	Standard Unit Upload Interface	STDUnit.xml	<input type="checkbox"/>
			<input type="checkbox"/>
			<input checked="" type="checkbox"/>
			<input type="checkbox"/>
			<input type="checkbox"/>
			<input type="checkbox"/>
			<input checked="" type="checkbox"/>
			<input checked="" type="checkbox"/>

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 the dropdown menu to select it from the list or enter to find it quicker.

SAVE

UNDO

REFRESH

DELETE

FIND

Interface Manager

Interface:

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Standard Unit Upload Interface

Number	Description	Value
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Refresh

Current Execution Schedule (Loaded 0 records)

ID	Description	Status	Schedule Date	Last Run	Frequency	Exclude Holidays	Submitted By	Run Desc
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Interface Parameters

SAVE
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DELETE
FIND

Interface Manager

Interface: Standard Unit Upload Interface



Interface Parameters (Loaded 6 records)

Number	Description	Value
1	INPUT FILE PATH	C:\M5\INTERFACEFILES\STDUNIT\IN
2	OUTPUT FILE PATH	C:\M5\INTERFACEFILES\STDUNIT\OUT
3	EMAIL	PROCUREMENT@ASSETWORKS.COM
4	DEFAULT MCC	01
5	DEFAULT TECH SPEC	01
6	DEFAULT PURCHASE ORDER NO.	

Refresh

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

Interface Parameter Explanations

Parameter Name	Description	Required (Y/N)
INPUT FILE PATH	<p>File path where the input file will be found. Note: This path refers to the C: drive on the batch server.</p> <p> 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.</p>	Y
OUTPUT FILE PATH	<p>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.</p> <p> 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.</p>	Y
EMAIL	User to whom an email updates will be sent upon about the interface run.	Y

Parameter Name	Description	Required (Y/N)
DEFAULT MCC	<ul style="list-style-type: none"> The default MCC will be loaded to all units in the file without an MCC 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	<ul style="list-style-type: none"> 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
DEFAULT PURCHASE ORDER	<ul style="list-style-type: none"> 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 StandardUnitUpdateTemplate.xls 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 & 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.

Field	Format, Length	Validated Value Required	Notes
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, certain 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, or 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.

Field	Format, Length	Validated Value Required	Notes
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'.
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.

Field	Format, Length	Validated Value Required	Notes
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.
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.

Field	Format, Length	Validated Value Required	Notes
SKU	VarChar2, 30	N	Can leave null.
Equipment Condition	Number5, 0	N	Can leave null.
Employee Owned Flag	Char,1	N	Can leave null.
Employee Owned ID	Number10, 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.
WO Notes	VarChar2, 4000	N	Unit work order notes and can be left blank.

Current Execution Schedule

The i-frame displays the current execution schedule for this interface. Currently and previously scheduled runs along with their ID, Description, Status, Scheduled Date, Last Run Date, Frequency, Exclude Holidays, Submitted By and Run Desc display.

Refresh

ID	Description	Status	Schedule Date	Last Run	Frequency	Exclude Holidays	Submitted By
77034	M5-STD-UNIT-INTF	Scheduled	04/09/2020 15:56:10		Once	N	

Schedule Details

Run Interval:

Once

Exclude weekends and holidays:
☐

First execution date/time:

Schedule / Reschedule

Schedule Details

Schedule Details

Once
Minutes
Hours
Days
Months

Run Interval:

5

Exclude weekends and holidays:
☒

First execution date/time:

04/03/2020 00:00:00

Schedule / Reschedule

To schedule the interface, enter schedule details.

- Select the run interval (Once, Minutes, Hours, Days, Months).
 - If only running once, right now, 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.
- If you would like to exclude weekends and holidays from the run then check the **Exclude weekends and holidays** box.
- Enter a **First Execution Date/Time** from which the run interval value should apply.
- When finished, select the **Schedule/Reschedule** button.

Interface Reject Manager

To view rejects for the Standard Unit Upload interface, navigate to the Interface Reject Manager frame.

SAVE

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Interface Reject Manager

Interface:

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Standard Unit Upload Interface

Interface Statistics (Loaded 6 records)

Stat ID	Run Date	Total Processed	Pass	Fail	Successful Reprocess	Elapsed Time In Hrs.

To locate the interface, select the dropdown menu to select it from the list or enter to find it quicker.

SAVE

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DELETE

FIND

Interface Reject Manager

Interface:

Interface Statistics (Record 1 of 29)

Stat ID	Run Date	Total Processed	Pass	Fail	Successful Reprocess	Elapsed Time In Hrs.
78207	12/04/2019 13:34:34	52	47	5	0	0.01
78206	12/04/2019 12:43:34	52	47	5	0	0.01
78172	11/11/2019 08:20:35	299	299	0	0	0.07
78092	09/16/2019 12:39:32	3	3	0	0	0.00

Interface Rejects (Loaded 5 records)

Resubmit	Error Stat ID	Msg No	Unit No	Description	Serial No	MCC	Tech Spec	Billing Code	Owning Dept	Using Dept	Maint Loc
<input type="checkbox"/>	78207	999	DHSTDUU002		DHSTDUSER002	DPH	DHSPEC		0010	0010	DH1
<input type="checkbox"/>	78207	999	DHSTDUU007		DHSTDUSER007	DPH	DHSPEC	BADBILL	0010	0010	DH1
<input type="checkbox"/>	78207	999	DHSTDUU018		DHSTDUSER018	DPH	DHSPEC	BADBILL	0010	0010	DH1
<input type="checkbox"/>	78207	999	DHSTDUU024		DHSTDUSER024	DPH	DHSPEC	BADBILL	0010	0010	DH1
<input type="checkbox"/>	78207	999	DHSTDUU029		DHSTDUSER029	DPH	DHSPEC	BADBILL	0010	0010	DH1

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 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: 999 – Cross validation error. Invalid billing code. The billing code must be entered.
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.

Updates

Release	Section	Description
23.2	All sections	Applied miscellaneous writing style updates throughout the document.
24.2	Overview Interface Manager Template	Updated the content to contact M5 Customer Care for .csv file assistance.