Work Order Auto Close Interface
Quick Reference Guide
Version 24.x
Last Modified 24.0 | March 2024

Overview

The Work Order Auto Close interface:

- Allows you to close work orders in M5 that fit within the selection criteria defined prior to submitting the interface run.

- Only closes work orders where the application business rules in the close work order component have been met.

- Does not close open work orders, only completed ones.

- Uses existing application components

  ⚠ However, will not apply closed work order fees if they are set for the location.

- Can be scheduled for multiple, simultaneous runs with differing parameters.
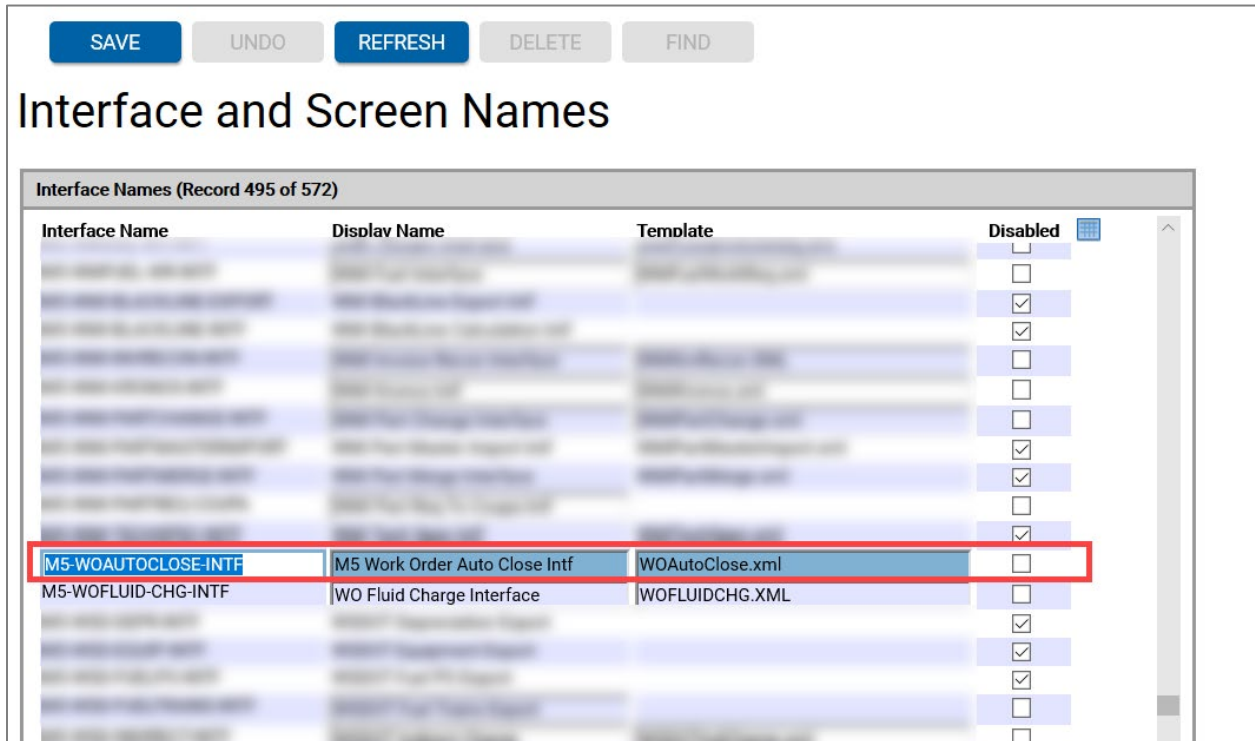
Why:

- More flexible selection criteria.

- Allows customers to close work orders while still identifying work orders where standard workflows are not followed.

Example

- An organization may have completed work orders where commercial charges exist, but the work order has not been closed.

Interface and Screen Names

To 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-WOAUTOCLOSE-INTF** on the list.

3. Make sure the **Disabled** checkbox is selected.

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:

| work order auto | × 🔍 |

M5 Work Order Auto Close Intf

| Number | Description | Value | 🔲 |

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

1. If you already have a set of parameters saved, you can select it from the **Parameter Group** dropdown.

2. To create a new set of parameters, select **New** from the dropdown and enter a new name for the parameter group in the **Name** field.

3. The following parameters are required before you can save:

   - ALLOW PART CHARGES

   - ALLOW LABOR CHARGES

   - ALLOW PRODUCT CHARGES

   - ALLOW COMMERCIAL CHARGES

All other parameters are optional. An explanation of each parameter can be found in the following section. After you have entered your parameters you can move on to scheduling the interface.

Interface Parameter Explanations

Parameter Name	Description	Required (Y/N)
FROM LOCATION	This value refers to the work order location, used in conjunction with the following parameter to set a location range for work order locations. The List of Values (LOV) is active for this parameter. ⛔ If you set a from value, you must set a to value. To run for a single location, use the same location in each. ⛔ If location group parameter has a value, this must be left blank.	N
TO LOCATION	This value refers to the work order location, used in conjunction with the previous parameter to set a location range for work order locations. The List of Values (LOV) is active for this parameter. ⛔ If you set a to value, you must set a from value. To run for a single location, use the same location in each. ⛔ If location group parameter has a value, this must be left blank.	N
LOCATION GROUP	This value allows you to set a valid location group value. The List of Values (LOV) is active for this parameter. ⛔ If location to or from parameters have a value, this must be left blank.	N
FROM DEPARTMENT	This value pertains to department work orders, used in conjunction with the following parameter to set a department range for department work orders. The List of Values (LOV) is active for this parameter.	N
TO DEPARTMENT	This value pertains to department work orders, used in conjunction with the previous parameter to set a department range for department work orders. The List of Values (LOV) is active for this parameter.	N
NUMBER OF DAYS	Accepts an integer value only. Work orders with a completed date less than the current date minus the value in this parameter will be closed.	N
ALLOW PART CHARGES	If set to Y, the interface will close work orders regardless of the existence of part charges on a given work order. If set to N, the interface will NOT close any selected work orders where a part charge exists on a job. If a part charge is found, the work order will be written to the reject manager. If a reject occurs, a specific error message will be included on the reject manager detail line.	Y
ALLOW LABOR CHARGES	If set to Y, the interface will close work orders regardless of the existence of labor charges on a given work order. If set to N, the interface will NOT close any selected work orders where a labor charge exists on a job. If a labor charge is found, the work order will be written to the reject manager. If a reject occurs, a specific error message will be included on the reject manager detail line.	Y

Parameter Name	Description	Required (Y/N)
ALLOW PRODUCT CHARGES	If set to Y, the interface will close work orders regardless of the existence of product charges on a given work order. If set to N, the interface will NOT close any selected work orders where a product charge exists on a job. If a product charge is found, the work order will be written to the reject manager If a reject occurs, a specific error message will be included on the reject manager detail line.	Y
ALLOW COMMERICAL CHARGES	If set to Y, the interface will close work orders regardless of the existence of commercial charges on a given work order. If set to N, the interface will NOT close any selected work orders where a commercial charge exists on a job. If a commercial charge is found, the work order will be written to the reject manager. If a reject occurs, a specific error message will be included on the reject manager detail line.	Y
ALLOW ZERO COMM CHARGE	This field is required if ALLOW COMMERCIAL CHARGES parameter is set to Y. If this parameter is N, then work orders WILL BE EXCLUDED (within all the other selection criteria) if a comm charge = 0.00 exists on the work order. If Y, then work orders will be closed within all the other selection criteria regardless of the comm charge value on the work order. If a reject occurs, a specific error message will be included on the reject manager detail line.	N
COMMERCIAL VENDOR	Using this parameter assumes only one unique vendor appears within a work order. If multiple vendors appear within a given work order, and the parameter vendor is found, the work order will appear in the reject manager. If a reject occurs, a specific error message will be included on the reject manager detail line.	N
EMAIL	A valid email entered here will be the recipient of M5 interface notifications for scheduled runs with these parameters.	N

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.

The **Refresh** button allows you to refresh and update the current execution i-frame.

Schedule Details

To schedule the interface, enter schedule details.

1. 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 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.

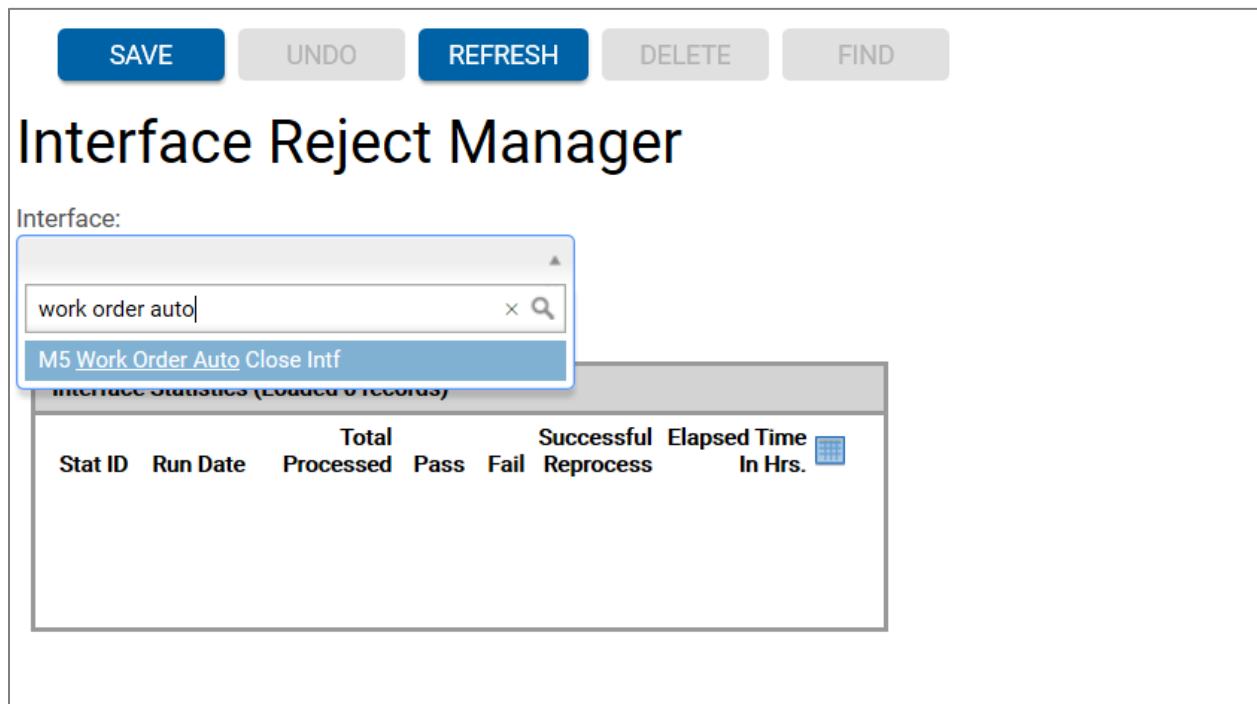You will receive the following message:
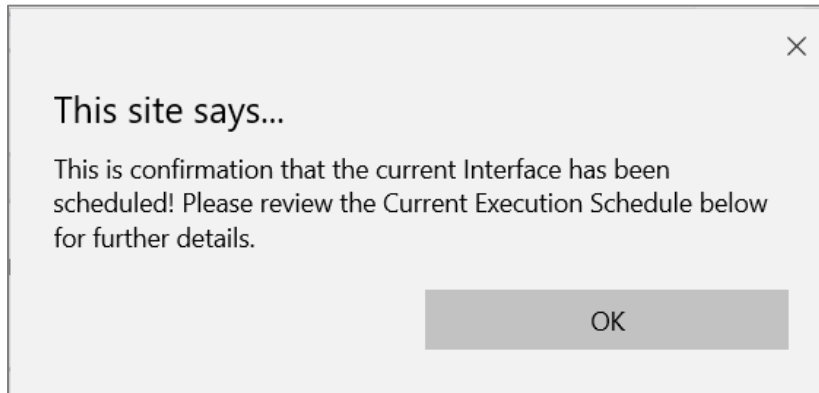
The scheduled run appears on the **Current Execution** i-frame. It can also be viewed on the System Run List of Jobs frame.

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

Interface Reject Manager

To view rejects for the Work Order Auto Close interface, navigate to the Interface Reject Manager frame.

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

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

2. 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 the amount of 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.

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

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

Risks

⚠ There are many parameters associated with this interface.

⚠ It is possible that someone could submit this interface with incorrect parameters, thus closing out work orders incorrectly.

⚠ Run the interface with extreme care, attention to detail, and caution.

Processing Decisions

⚠ This interface can be scheduled multiple times with multiple criteria.

⚠ All application component business rules for closing work orders or not closing work orders will be used. In other words, if a WO cannot be closed on-line it cannot be closed by using this interface.

⚠ A **read-only** reject manager entry for this interface will be created to simplify the post execution identification of candidate work orders which should have been closed. The reject manager rows will have no effect on normal in-app close work order functionality. However, customers may select a rejected row for reprocessing. Deleting a reject manager row or reject stat row will have no effect on the work order itself, or the normal on-line close work order functionality. AssetWorks assumes customers will assign a resource to monitor the interface rejects and clean up the stat or detail rows.

⚠ Closing a work order in-app will not remove a reject manager Stat or Detail row. If the Associate attempts to reprocess a rejected row, and the work order was otherwise closed in-app, the detail row will simply be deleted, and the record will be counted as successful.

Updates

Release	Section	Description
23.2	All sections	Applied miscellaneous writing style updates throughout the document.