



System Administration

Application User Training

Version 24.x
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Contents

- M5 Configuration and Setup Overview 6**
- Setting and Maintaining System Flags 6**
- Favorites Menu..... 8**
- Creating New Users Overview 9**
- Role Creation and Maintenance 10**
 - General tab 10
 - Create a New Role 11
 - Locations/Operational Entities tab..... 12
 - Location Groups..... 13
 - Operational Entity Groups 15
 - Menus/KPIs tab 16
 - Menu Maintenance 16
 - Creating Menus..... 17
 - KPI/PMM Groups..... 19
- Privileges tab..... 20**
- Reporting tab..... 21**
 - Printer Groups 21
 - Report Groups 22
 - Adhoc Groups..... 23
- Application Users tab 24**
- Department/Chat Groups 24**
- Vendor Gateway tab 24**
- Indirect Accounts tab 24**
- Role Copy 25**
- Delete a Role 25**
- Customer Data View Users 26**
- DAF Code Maintenance..... 26**
 - Frame Maintenance for the DAF Code 27
 - Create New DAF Department Group..... 28
 - Department Group Level Security 29
- Database Users 30**

Application User	31
Application User Information	32
Application User Identity	33
Crystal Enterprise	35
Printer Definition	35
Printer Assignment	36
Report User Pool	36
Crystal Enterprise Monitor Company	37
Crystal Enterprise Monitor User	38
Report Log Administration	38
Saved Reports	38
Report Options	39
Report Alternate	39
Run Immediate Purge	40
System Version	40
M5 Params Maintenance Frame	41
M5 Parameter Query Screen	42
System Performance Monitor	42
System Activity Monitor	43
Active User Query	44
View Log Files in M5	45
Security Logging	46
Log Event Maintenance	46
Log Event Viewer	47
Table Auditing (for Oracle Clients only)	47
Table Column Audit	48
Table Audit Query	49
Frame Maintenance	50
Report and Frame Information	50
Frame Maintenance tabs	51
Company Definition	52
General tab	52
Remit To tab	53
Account Template tab	53
Tech Spec Template tab	54
Fuel Focus tab	55

Fiscal Calendar	56
Periods tab.....	56
Years tab	57
Holiday Calendar.....	57
Mask Maintenance	59
State/Country Codes	60
Time Interval.....	61
Time Zones	62
System Translation Maintenance	63
Interface and Screen Names.....	64
Interface Code Translation.....	65
Interface Manager	66
Repeat Repair Data Gen	67
Interface Reject Manager	68
PM Notify.....	68
Batch Process Manager	69
Batch Processes	70
ABC Class Assignment	70
Allocation	70
Archiver.....	70
Close Billing Period	71
End of Day	71
End of Period	72
End of Period Process	73
Forecaster.....	74
Part History	74
Parts Requisitions.....	75
Planned Absence.....	75
Repeat Work.....	76
Run Billing Period	76
Unit/Component Record Purge	77
Physical Inventory Create Count.....	77
System Run List of Jobs	77
Notification Manager	78
Notification Manager Set Up.....	78
Available Notifications	78

Available Notifications list	79
Notification Break Down	82
Disable or Enable a Notification	83
Location Option.....	83
Location Main	84
Edit Subject or Message.....	84
Add Attachments	85
Notification History Query.....	86
Notification Variables, Qualifications, and Recipients	87
Email Group.....	96
Email Address Maintenance	98
Special Character Rules.....	98
Appendix A. Role Privileges.....	99
Appendix B. System Flags	112
Appendix C. M5 Params.....	112
Updates.....	130

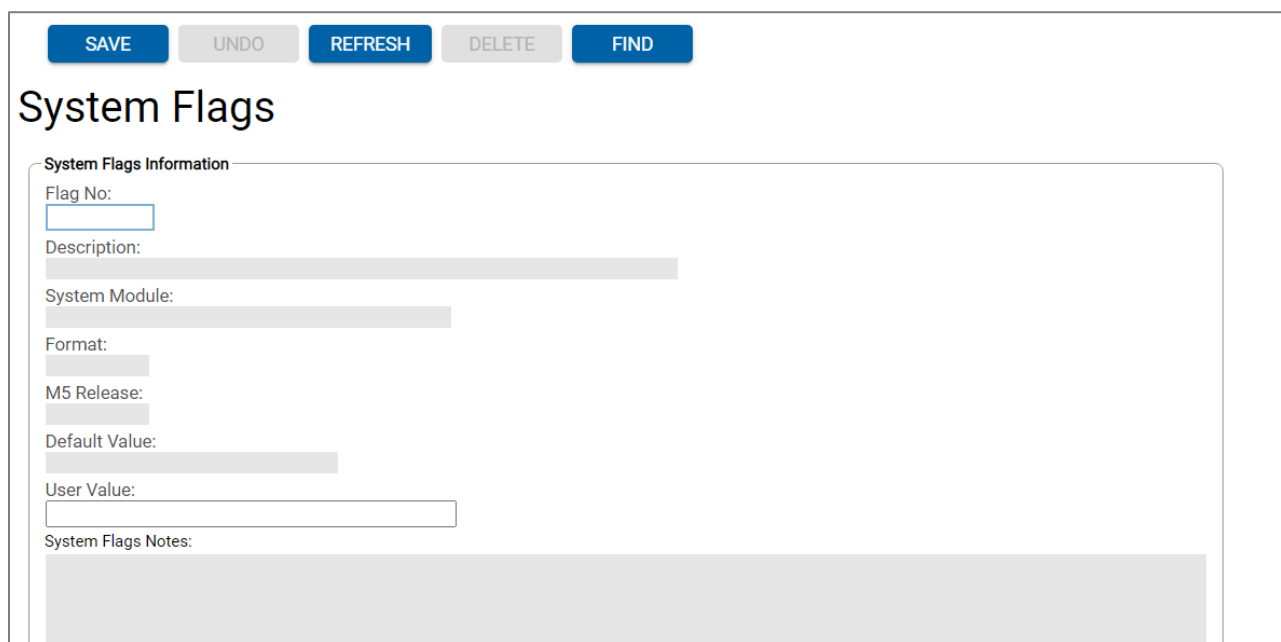
M5 Configuration and Setup Overview

The System Administrator is responsible for the configuration and setup of the M5 System. The configuration and setup steps were defined during the project start up and detail how your M5 system operates in terms of coding, organizational structure, workflow, and inventory.

All these steps must be completed and verified before moving the M5 System into a live production status. After your site has gone into live production these codes should be reviewed and maintained on a regular basis.

As you become familiar with the M5 System you will discover items that can be improved and enhanced to further customize your M5 System. This System Administrator document is offered as an ongoing support tool for performing this critical maintenance. However, it is not intended to replace formal AssetWorks training. Your System Administrator should receive the comprehensive AssetWorks training available through your Project Manager. They will use this and other documents during that training. *Appendix C* is a Glossary of Terms that you might want to review now as well. You may not be familiar yet with how some of the terms are used in the M5 System.

Setting and Maintaining System Flags



The screenshot shows a web interface for configuring system flags. At the top, there are five buttons: SAVE (blue), UNDO (grey), REFRESH (blue), DELETE (grey), and FIND (blue). Below the buttons is the title "System Flags". Underneath is a section titled "System Flags Information" containing several input fields: "Flag No:" (text box), "Description:" (text area), "System Module:" (text box), "Format:" (text box), "M5 Release:" (text box), "Default Value:" (text box), "User Value:" (text box), and "System Flags Notes:" (text area).

The architecture of your new M5 System is designed to be highly configurable to the specific needs of the working environment in your fleet organization. A key component of this flexible structure are the System Flags.

System Flags serve as switches to activate or deactivate various features and functionality. Typically, they are Yes or No settings, but you will also see numeric choices as well. Refer to the *System Flags Table* for a complete listing of all the flags.

You should review it and become familiar with the different settings of the System Flags that impact the configuration of your system. They must be set according to the current business practices implemented in each of the M5 modules.

These need to be reviewed periodically as your business procedures can change and new system flags can become available in a new release of the software.

To set and maintain the System Flags, use the following steps:

1. Open the System Flags frame. The quickest way to find any frame in the M5 System is to use the Menu Search bar at the top of the Menu. Enter System in the Search field and it displays flags that contain System in the title. Select System Flags, the System Flags frame opens.
2. Double-click in the Flag No field to view the System Flags List, or enter a System Flag number.

System Flags Favorite

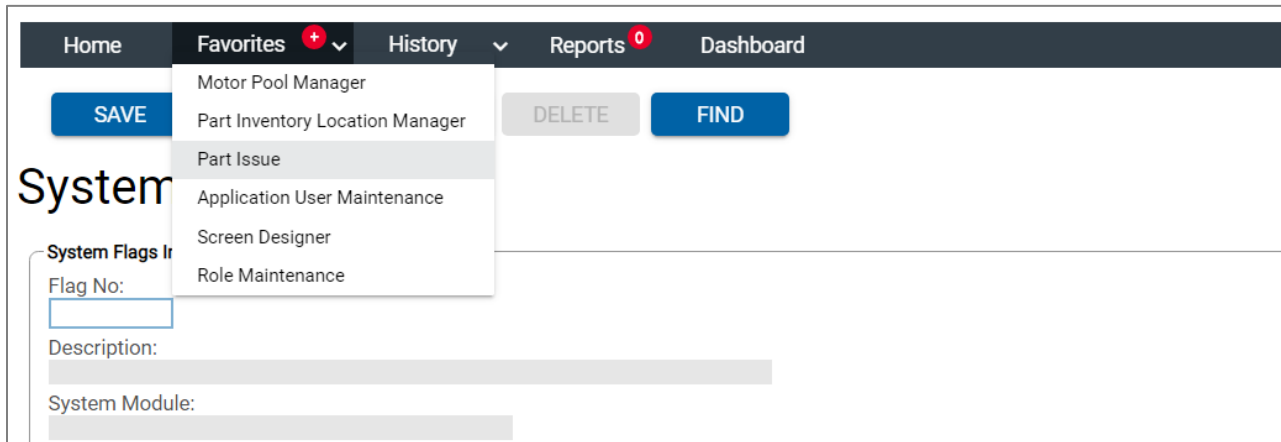
Search:

Flag	Description	User Value
1000	Allow M5 to automatically create New Unit Numbers? (Y/N/A)	A
1012	Define the Number of Fiscal Periods	12
1013	Last End of Period run	11/02/2020 19:35:58
1014	Last End of Year run	02/26/2020 12:31:16
1021	Consider a Parts PO closed until full receipt?	Y
1023	Maint. Loc mandatory on new unit?	N
1035	# Of Days Back For Standard Job Query	2000
1036	# Of Days Forward For Work Requests	30
1042	Fuel Site ID/Customer Number/1st Facility Code	123456
1043	Allocations used?	N
1044	Use MCC MPG for units?	N
1045	Type of pricing to use for products?	I
1050	Prompt for Purchase Order on New Unit?	N
1053	Meter rollover limit %.	10
1054	Number of months to propagate shifts.	180
1055	Serial number required?	N
1056	Serial number unique?	N
1058	Type of pricing to use for inventory values?	LOCAVG
1059	System wide or Location Range of Work Order Numbers?	S
1061	Shift Code required for Employee ?	N

Showing 1 to 20 of 607 entries

3. Select a System Flag to see the description and make a change to its setting.
4. Review the description and change the User Value field as needed. Acceptable values are Y/N/A (Yes, No, Always). Numeric values are occasionally included as a selection choice. User Value is the only field you can modify on this frame. Select SAVE to update the setting.

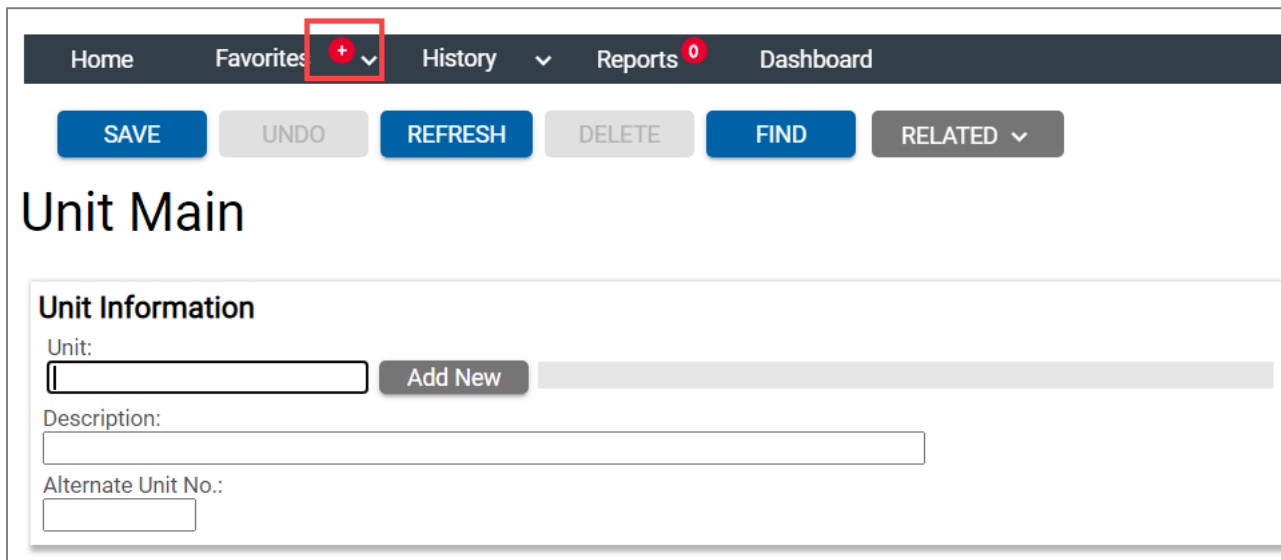
Favorites Menu



The first frame that appears after a user logs into M5 is the Homepage. The M5 System Administrator can customize this Homepage by using the Screen Designer module and by adding Favorites to the user's Favorites Menu.

Screen Designer allows additional elements like dashboard KPI's, notifications and corporate wide messages. However, it is not part of the standard system package. It does require an additional license. Favorites are located on the Static Menu Bar.

When you are viewing a system frame a plus symbol will appear in the upper right-hand corner if the frame is not currently in the favorites (for example, the Unit Main frame).



Select the add (+) icon to add it. When the frame is added it appears on the user's homepage in the My Favorites area. To remove a page from the favorites, the user can select that page and select the remove (-) icon by the Favorites Menu. You can also maintain the My Favorites area list from the homepage by using the add or remove icons next to the My Favorites area title.

Creating New Users Overview

Controlling users who access the M5 System is one of the primary functions of the M5 System Administrator.

This is an overview of the basic steps for creating a new user in the M5 system.

1. The role for the user must be created. One role can be assigned to many individual application users. The role designates the locations, menus, privileges, Crystal Reports and Department, or Chats within the M5 system. It can also have restrictions placed by the database administrator (DBA) to better secure the M5 database.
2. If you are using Oracle for your database, you need to create the database user for each role. The database user further identifies the different roles within the M5 system. The Database User ID can be a maximum of 8 characters. The password can be up to 30 characters and cannot start with blanks or a number. If you are using SqlServer for your database then database users are not necessary.
3. You can create an application user and assign a role. The application user identifies each individual user within the M5 system. Multiple Application Users can be assigned the same role. For implementation purposes M5 is delivered with an application username of CSI already created. Do not delete or remove the CSI username. Changing the CSI user in will cause problems during the implementation.
4. If you are using Oracle, there must be at least one role with one database user before an application user can be created. The requirements for the number of application users will be dependent on whether you are implementing a virtual private database (VPD). Application user IDs must be unique for each database. So if you implement VPD to create a database for multiple companies each company will require its own unique CSI application user. Therefore, it's recommended that you implement the following structure: CSI is used for company 1, CSI_02 is used for company 2, CSI_03 is used for company 3, and so on. This also applies for any other application user who will be allowed to access multiple companies.

Role Creation and Maintenance

As we discussed in the Creating Users overview, roles play a central part in defining users of the M5 system. They are the foundation records that Users are built on. The next sections address the details of Role creation and maintenance and illustrate how critical it is to understand the steps required and the sequences to follow when creating and maintaining them.

Before creating a role some preparation steps are necessary. Primarily these involve the creation of groups for locations, operational entities and customized menus with field restrictions. These groups and their dependencies were discussed during your Jump Start Training sessions.

General tab

Open the Role Maintenance frame. From this frame you can create a new role or modify one already in the system. The General tab information displays.

The screenshot displays the 'Role Maintenance' application interface. At the top, there is a navigation bar with buttons for 'SAVE', 'UNDO', 'REFRESH', 'DELETE', 'FIND', and 'RELATED' with a dropdown arrow. Below this is the main title 'Role Maintenance'. Underneath the title is a 'Role Information' section with two input fields: 'Role:' and 'Description:'. Below the 'Role Information' section is a horizontal tabbed menu with the following tabs: '+ General', 'Locations/ Oper Entities', 'Menus/ KPI', 'Privileges', 'Reporting', 'Application Users', 'Departments/ Chat Groups', 'Vendor Gateway', and 'Indirect Accounts'. The 'General' tab is currently selected. The main content area under the 'General' tab is titled 'General Information' and contains several form fields: a large 'Notes' text area, a 'Restricted Home Page:' text field, two checkboxes for 'Outside User:' and 'Two Factor Authentication:', a 'Database User Id:' text field, and a 'Maximum Allowable PO Line Value:' text field.

Create a New Role

To create a new role, select the Role field and enter a new role ID. It's helpful to style the ID in a way that is easily associated with the employees you anticipate assigning to this role such as mech for mechanics.

Your company may already have common abbreviations for various groups that could also be used in this situation. Press Tab to move to the Description field, the Action Required window opens.

The screenshot shows the 'Role Maintenance' web interface. At the top, there are buttons for 'SAVE', 'UNDO', 'REFRESH', 'DELETE', 'FIND', and 'RELATED'. The main heading is 'Role Maintenance'. Below it, there's a 'Role Information' section with a 'Role' field containing 'MECH101' and a 'Description' field. A dialog box titled 'Action Required' is overlaid on the interface, displaying the message: 'Role MECH101 does not exist. Press "Create" to create it. Press "Cancel" to enter a new value.' The dialog box has 'Create' and 'Cancel' buttons at the bottom. In the background, there are tabs for 'General', 'Locations/Oper Entities', 'Application Users', 'Departments/Chat Groups', 'Vendor Gateway', and 'Indirect Accounts'. The 'General' tab is active, showing a 'Notes' field and a 'Restricted Home Page:' field. There are also checkboxes for 'Outside User:' and 'Two Factor Authentication:'.

Select Create to create the new role. Next enter the data for any of the remaining fields on the General tab, as applicable (for example, Description).

The Restricted Home Page field allows you to enter a specific home page for Application Users assigned to the role. If a value is entered here it overrides any value set at the App User level and does not allow them to change their individual home page.

Two Factor Authentication can be activated by using the M5 Parameters frame. If the Email_By_Role value is chosen and the checkbox is selected, as users attempt to log in, the system sends the appropriate email address an authorization number.

Users only have one chance to enter the code. If it is incorrect, it will have to be re-entered. Dashes have to be included.

Users will also only have 10 minutes to enter the code in the frame that is presented (unable to use the same code in a different one, should you try to log on again, a new code is generated).

If the user does not enter the correct code in the allotted time, they will receive a code expired notification on-screen and will be required to attempt to log in again (subsequently will be given a new code).

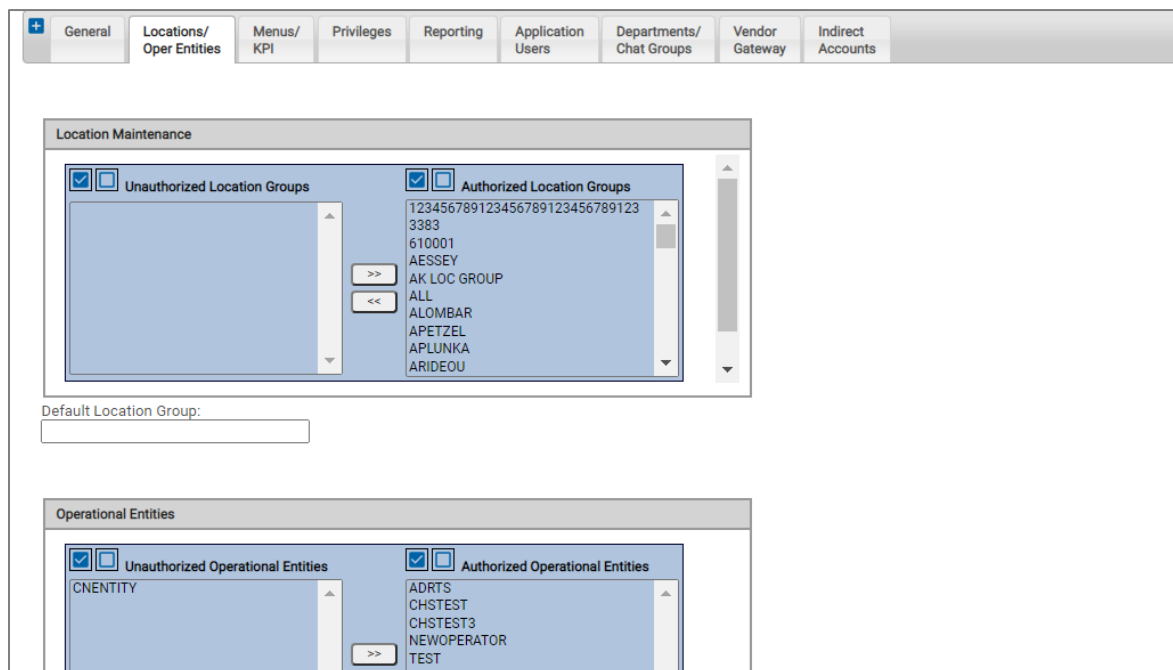
Part Request Approval Amount field

- If the Part Request Approval Amount is left blank - No restrictions will be needed to approve part requests.
- If the Part Request Approval Amount is entered as 0 (Zero) - All part requests will require an approval for this role.
- If the Part Request Approval Amount is entered as a dollar value - Any part requests total exceeding this value would require an approval.
- Works in conjunction with the APPROVE PART REQUEST and APP OWN PART REQUEST privileges.

Commercial Request for Service Approval Amount field

- If the Commercial Request for Service Approval Amount is left blank - No restrictions will be needed to approve commercial requests for service.
- If the Commercial Request for Service Approval Amount is entered as 0 (Zero) - All commercial requests for service will require an approval for this role.
- If the Commercial Request for Service Approval Amount is entered as a dollar value - Any commercial requests for service total exceeding this value would require an approval.
- Works in conjunction with the APPROVE SVC REQUEST and APP OWN SVC REQUEST privileges.

Locations/Operational Entities tab



On this tab, you can assign any Location Groups or Operational Entity Groups that apply to the specific role. These are generally used as additional system security measures to ensure users are only accessing locations and parts of the system that pertain to their job function.

Location Groups

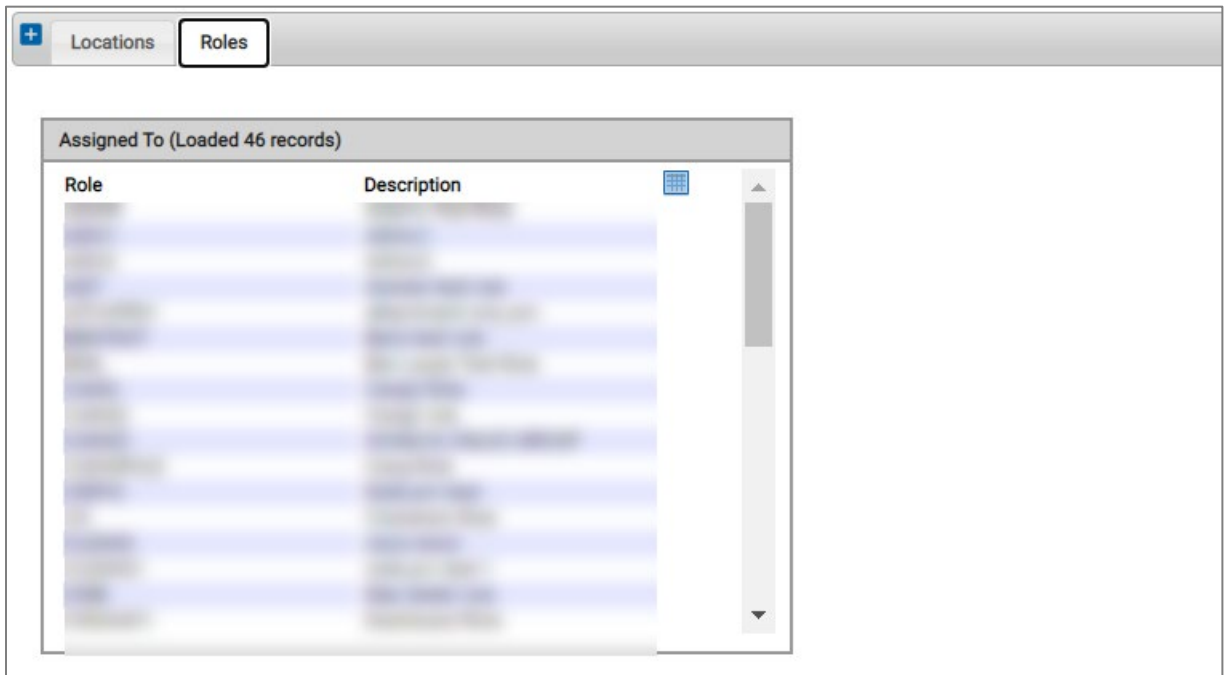
The Security Location Groups frame defines a group of locations or a cost center. The Security Location Group is assigned to the role. If a location is added or deleted from the group, it becomes effective for all users within that group. The location group should be created keeping in mind what functions the users will be allowed to do within each location (for example, Shop Managers can only be allowed access to certain locations).

The screenshot shows the 'Security Location Group' configuration interface. At the top, there are buttons for 'SAVE', 'UNDO', 'REFRESH', 'DELETE', 'FIND', and 'RELATED'. Below these is the title 'Security Location Group'. A 'Location Group' section contains a 'Name:' field with 'FM' entered and an 'Order by' section with radio buttons for 'Number' (selected) and 'Name'. Below this is a tabbed interface with 'Locations' and 'Roles' tabs. The 'Assigned Locations' section features two columns: 'Locations not included' and 'Locations in group'. The 'Locations in group' column contains one entry: 'FM - FM Parking Location'. There are '>>' and '<<' buttons between the columns.

Use the following steps to create a Location Group.

1. Open the Location Group frame.
2. Enter the location group name and press Tab. An Action Required confirmation window opens. Select Create to create the new group.

3. The column on the left shows locations that are not included in the group. The column on the right lists locations that are in the group.
4. The column for locations not included will show all locations. Double-click on the location or select the location and then select the >> button. You can hold down the CTRL key and select multiple locations then select the >> button. To select all locations, select the green check mark button then select the >> button.
5. To remove a location from the group, highlight the location to be removed and select the << button or just double-click on the group name.
6. Users can be added to the Location Group by selecting the Roles tab.



7. Select the roles that belong to the locations you want to include in this group. When you have placed all the locations in the group, select SAVE.

Operational Entity Groups

The screenshot shows a web application interface for 'Operational Entity Groups'. At the top, there are buttons for 'SAVE', 'UNDO', 'REFRESH', 'DELETE', 'FIND', and 'RELATED'. Below these is the title 'Operational Entity Groups' and a sub-section 'Operational Entity Group Maintenance'. A text input field labeled 'Operational Entity Group:' contains the value 'CHSTEST'. Below this are two tabs: 'Operational Entities' (selected) and 'Roles'. A table titled 'Assigned Operational Entity Groups (Loaded 1 records)' is displayed. The table has two columns: 'Operational Entity' and 'Description'. The first row shows 'CNDEPT001' and 'Part Department 001'. There is a small blue icon to the right of the description.

Operational Entity	Description
CNDEPT001	Part Department 001

Operational Entity groups define a group of operational entities or locations. An operational entity is a separate and distinct work group.

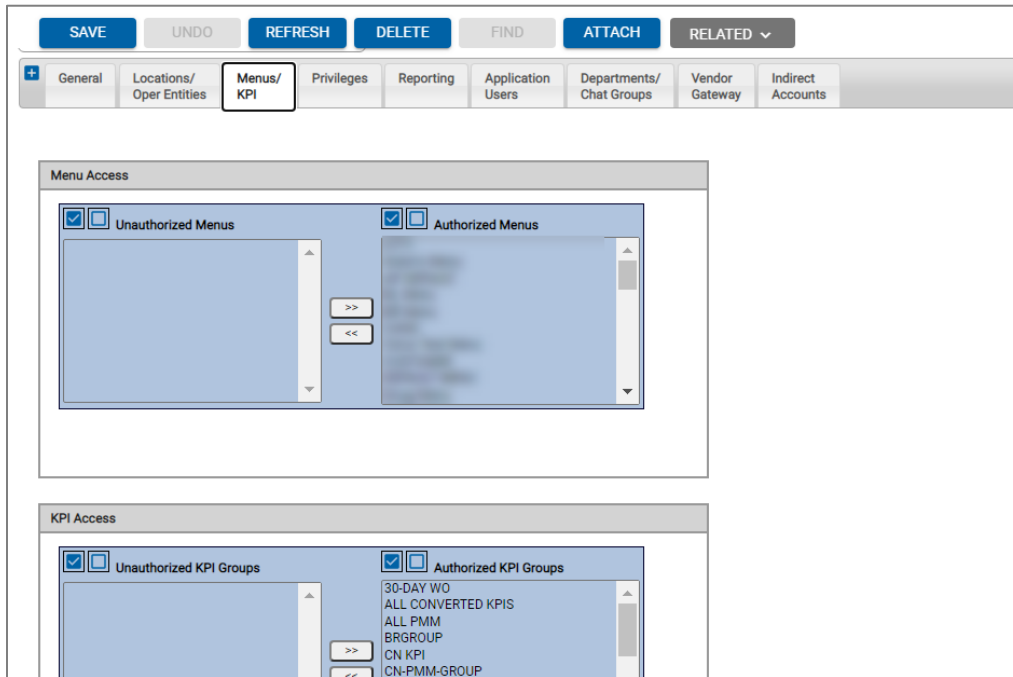
The grouping can be done by job functions at the same location or by separate physical locations. It is used in the Unit Availability Module.

The operational entity group is assigned to the database user. The database user is different from the application user and performs a specialized function that we will discuss later in this manual.

If an operational entity is added or deleted from the group, it becomes effective for all users within that group. The operational entity group should be created keeping in mind what functions the users will be allowed to do within each operational entity.

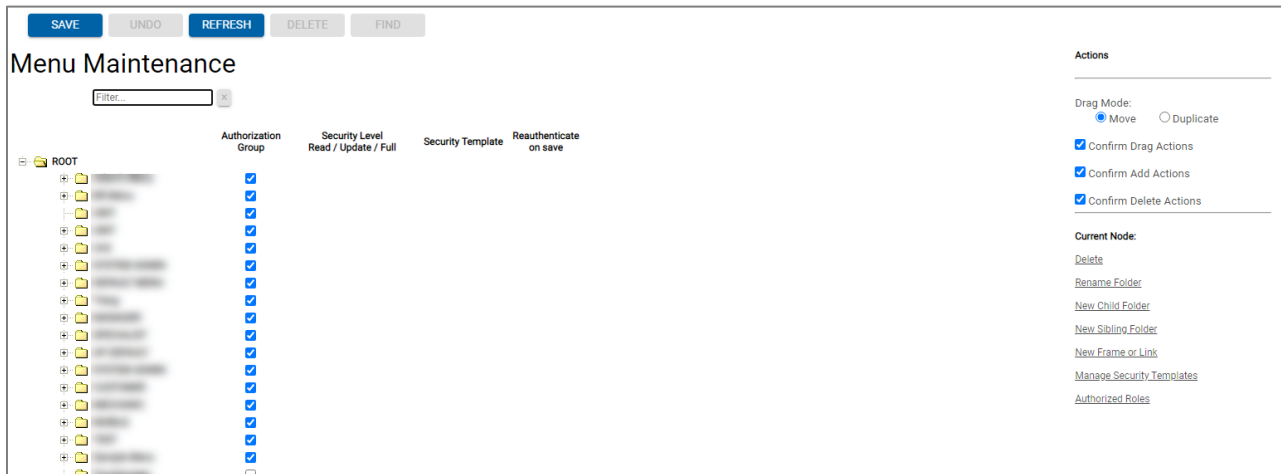
The selections for Location Groups and Operational Entities can be added and deleted on this frame by selecting the choices and using the appropriate arrows buttons or double-clicking the selection to move it onto the desired list.

Menus/KPIs tab



On the Menus and KPIs tab you can assign any custom menus from Menu Maintenance as well as KPI Groups that the role should have access to. See the KPI Groups frame for more information about setting up these groups.

Menu Maintenance



Customizing menus in the M5 System allows the System Administrator to control which menu functions the end user can access. They can be limited to very specific fields within certain frames. This approach also helps the end user to navigate efficiently through the M5 System. The Menus/KPI tab on Role Maintenance is where you add and remove menus for your roles.

Use the Current Node hyperlinks to add new menus, folders, frames, links, manage security templates, rename folders, or delete items.

Creating Menus

When you first implement your M5 System you will need to create your own menus. M5 is delivered with a Sample Menu for your reference.

DO NOT MODIFY THE SAMPLE MENU. It is there for your reference and it is a great resource. If you modify it, you will lose the references it contains. As a System Administrator in the Menu Maintenance frame you will have the rights to modify it. So as you begin your work creating menus double check your updates before saving.

Menu Maintenance contains some additional elements in the columns to the right of the folder names and at the right edge of the frame.

Authorization Group	Security Level Read / Update / Full	Security Template	Reauthenticate on save
------------------------	--	-------------------	---------------------------

- The Authorization Group column, select the checkbox so that the menu appears in the list of menu items on Role Maintenance. This allows you to control access to the menu according to role.
- Custom if selected, allows the entire menu structure under the folder to be assigned to another menu.
- The Security levels can be set as Read-only, Update, or Full.
- Security Templates can be assigned that further restrict field access rights.
- Reauthenticate on Save requires the user to enter their password again prior to updating the record on that frame.

Actions

Drag Mode:
 Move Duplicate

Confirm Drag Actions

Confirm Add Actions

Confirm Delete Actions

Current Node:

[Delete](#)

[Rename Folder](#)

[New Child Folder](#)

[New Sibling Folder](#)

[New Frame or Link](#)

[Manage Security Templates](#)

[Authorized Roles](#)

- The Actions section controls what happens when you add or delete folders by selecting an action or by dragging a folder from one menu to another with your mouse.
- Current Node indicates what actions are available to you based on your current location on the menu folder tree.

To begin creating a menu, select the Root folder at the top of the tree. Notice that the Current Node indicates Root and the New Child Folder is the only option highlighted.

1. Select New Child Folder. In the Create Folder pop-up, name your new menu folder. Select OK.
2. Your new menu folder appears at the bottom of the tree. Select it and notice that the Current Node options change.
3. Select New Child Folder again under the Current Node options. The Create Folder window opens where you name your new folder and select OK.
4. The + mark now appears by your Menu folder, select it to open the folder and see the new Menu One folder.
5. If you anticipate assigning the entire menu to a user, select the Authorization Group button to check that selection.
6. Now you can add some frames to the new Menu One. Select it and select New Frame or Link in the Current Node choices.

7. The Add New Item window opens and you can see the list of every frame that is available in the system. There are currently over 1200. The name, description and type is shown as well as the presence of any Security Templates available on the frame. On this page Dashboard Duplicator has a Security Template available. There is also a Search field where can look for a specific frame by name.
8. Select the Dashboard Duplicator and you will see the confirmation notice that it is added to the Menu One folder. Select OK to close the pop-up and stay on the list to select another frame. When you are through choosing frames select the X to close the window.
9. Notice the attributes that have been assigned to the frame by default. There is a roll-over tool on this window that will tell you what each button is for. In this frame it shows.
10. Full access rights to the new frame. Roll your cursor arrow over each of the buttons and you will see the descriptions appear. Notice also that the Current Node options now have Manage Security Template highlighted since one is available for this frame.
11. Select the Manage Security Template option. Select New Template, Enter the Name of your choice, and select OK.
12. The new template frame opens showing the frames that it controls. By default all the frames are added as Updatable but the ones below are set to illustrate how you might want to customize them. In this case the option Radio screen is hidden, ReplaceDash is read-only and VenNumberDesc can be updated. Notice also that the Delete Action is not highlighted. These template items cannot be deleted. Marking them as Hidden effectively deletes them from the user's view. If the field is a required field, **do not** mark it as hidden.
13. Select Menu Maintenance to return to the main frame and view your menu folders.
14. If you decide that you need to delete a folder from the menu tree select the folder and select Delete in the Current Node choices.

KPI/PMM Groups

KPI's are Key Performance Indicators and PMMs are Performance Measure Monitors. KPIs are indicators of current activities in M5. PMMs are trend indicators. The Performance Measure Monitor is an optional module and it does require an additional licensed.

KPI and PMM groups are added and maintained on the Menus/KPI tab. PMMs are listed alphabetically with the KPI Group names.

Before the KPI/PMM's can appear on this assignment group list, they need to be created in the KPI/PMM Groups frame. Careful planning prior to completing the creation of these groups will save you considerable maintenance in the future. After you are ready, open the KPI/PMM Group

frame shown below.

1. To create a new group, enter the KPI Group name you are creating and press Tab.
2. Select Create to create the new group. Then select the type, KPI or PMM.
3. Then select the Name field to select the KPI/PMM to add to this new group.
4. From the KPI List select the KPIs you want in this group.
5. Select the SAVE icon.

Privileges tab

The Privileges tab is perhaps the most important aspect of Role Maintenance. M5 uses role privileges to determine much of what users with the role can and cannot do within the system.

For more information on specific Role Privileges and what they do, refer to the *Role Privileges Table* document. A full list of privileges can also be found in *Appendix A*.

Reporting tab

The Reporting tab allows you to assign any Printer Groups or Report Groups that the role needs for use with Crystal Reports.

The Reporting tab is used to manage the process of producing reports from the Crystal Enterprise reporting system. Crystal Enterprise is covered in full detail later in this manual. In the Role Maintenance section, there are three group components to be familiar with, Printer Groups, Report Groups, and Adhoc Groups. Select the Reporting tab in Role Maintenance. Here you see three of the familiar Authorized/Unauthorized Group frames, one for Printer Groups, one for Report Groups and one for Adhoc Groups.

From this frame you can add or remove any of the three existing group types from Authorization on the Role you have selected.

Printer Groups

Printer	Description
CANON2	canon2
CANON3	canon3

Each role must have a printer group assigned in order to be used in Crystal Enterprise.

1. If you need to create a new Printer Group open the Printer Groups frame. In the Name field enter your new group name and press Tab. Select Create to make the group.
2. Select the Role field to see a list of available Roles. Select the desired role to select it, and then select SAVE to update the new Printer Group record.
3. Select the Printer tab to designate a printer for this group. Select the printer field and a list of available printers appears. Select the desired printer to select it and then select SAVE to update the Printer Group record.

Now you have a new printer group with an assigned role and a designated printer. To delete a printer group:

1. Enter the printer group to delete or select find.
2. Select the DELETE Button on the toolbar. A confirmation window appears.
3. Select Delete in the confirmation window.
4. Select the SAVE icon.

Report Groups



Report Groups are used with Crystal Enterprise for any scheduled report that is produced for more than one user. Instead of each user running the report a Report Group is created.

When the report is produced it is stored in each user's bin on their Home Page. However, the user running the report also retains the option to keep the report private or send it to the other users.

The report group is assigned to the Role. To create a Report Group, open the Report Group frame and scroll to the bottom of the list. Select the empty field and enter your new Report Group name. Select SAVE.

The new group will be added to the list and a new empty field is added at the bottom. If any changes need to be made to the Report Group name, it must be deleted and re-created.

To delete a report group, select the report group name on the list to select it. Select the DELETE button on the toolbar. Then select SAVE to update the report group list.

Adhoc Groups

SAVE UNDO REFRESH DELETE FIND RELATED

Adhoc Group Maintenance

Adhoc Group

Name: Order by: Domain Name

Objects Roles

Excluded/Included Database Objects

Objects not included	Objects in group
<input checked="" type="checkbox"/> ASSETS - BPM_VIEW_ACCIDENT_ITEM_I	<input checked="" type="checkbox"/> ACCOUNTS - VIEW_ACCT_ALL_CURREN
<input checked="" type="checkbox"/> ASSETS - BPM_VIEW_DEPT_ITEM_PIV01	<input checked="" type="checkbox"/> ACCOUNTS - VIEW_ACCT_ALL_CURREN
<input checked="" type="checkbox"/> ASSETS - BPM_VIEW_DRIVER_EVENT_M	<input checked="" type="checkbox"/> ACCOUNTS - VIEW_ACCT_ONE_BLEXP
<input checked="" type="checkbox"/> ASSETS - COMP_STATUS_HIST	<input checked="" type="checkbox"/> ACCOUNTS - VIEW_ACCT_ONE_BLEREV
<input checked="" type="checkbox"/> ASSETS - DEPT_MAIN	<input checked="" type="checkbox"/> ACCOUNTS - VIEW_ACCT_ONE_ROW_EX
<input checked="" type="checkbox"/> ASSETS - DEPT_MAIN_2	<input checked="" type="checkbox"/> ACCOUNTS - VIEW_ACCT_ONE_ROW_RE
<input checked="" type="checkbox"/> ASSETS - FFX_VIEW_BILLSUM	<input checked="" type="checkbox"/> ACCOUNTS - VIEW_DIR_ACCT_DEPT
<input checked="" type="checkbox"/> ASSETS - FFX_VIEW_UNIT_VOC2	<input checked="" type="checkbox"/> ASSETS - 123456789012345678901234
<input checked="" type="checkbox"/> ASSETS - FFX_VIEW_VOC2	<input checked="" type="checkbox"/> ASSETS - AVAILABILITY
<input checked="" type="checkbox"/> ASSETS - FFX_VIEW_VOC2_DISP1	<input checked="" type="checkbox"/> ASSETS - CATEGORY_TREND_COUNTS
<input checked="" type="checkbox"/> ASSETS - FFX_VIEW_VOC2_DISP2	<input checked="" type="checkbox"/> ASSETS - COMP_MAIN
<input checked="" type="checkbox"/> ASSETS - FFX_VIEW_VOC2_JOBDET	
<input checked="" type="checkbox"/> ASSETS - UDCM_MMMYL	
<input checked="" type="checkbox"/> ASSETS - UNIT_MAIN	

Adhoc Groups define a group of data views. Your database contains many tables. A view of the data may be thought of as a picture of certain portions of the tables in your database. The view can be designed to include or exclude portions of the tables depending on the purpose of the users who will be viewing it.

The Adhoc Groups consist of database Objects and database Domains. In the database structure Objects are organized into Domains. A full discussion of Objects and Domains comes later in this manual but for the purpose of Role Maintenance, objects and domains are used to define the views and the views make up the Adhoc Group.

These groups are used in the Adhoc Reporting module. The data sources for the Adhoc reports are views of the M5 data. The Adhoc Group Maintenance frame defines which views the users can view and report on.

1. When you first open the frame it is empty. In the Name field you can enter the Name of a new Group if you want to create one or you can double-click to open the list of existing Groups.
2. Enter new Name and tab to create it, select Create, and then SAVE to update it.
3. Double-click Name to display the list of existing Adhoc Groups and then double-click the Group name to display the objects it contains.
4. After the list of objects is displayed you can exclude or include the objects for the group you are working on. When the list is complete, select SAVE to update it.

Application Users tab

The Application Users tab gives you the ability to view the Application Users currently assigned a specific role. Each record displays in read-only format and contains the Application User ID, their Name, Division, Phone Number, and Expiration/Disabled information, if applicable.

Department/Chat Groups

The Department/Chat Groups tab allows you to manage and assign any Department Groups or Chat Groups to the role. To assign a group, select the group to highlight it, and then select >> to move the group into the Assigned column.

The Disable DAF for Reports checkbox allows users to run any reports regardless of DAF settings.

Select the Department/Chat Groups tab on your Role Maintenance frame to view the assigned groups for the role you have selected. The Department Groups are used for an additional level of security called Department Access Function (DAF).

They are also used for Customer Data View Users. The Department Access Function (DAF) provides an additional layer of security at the department level. Similar to Field Security Templates, it controls the user's ability to view or update data on their department's frames.

Security Codes use Department Groups to establish this control and are integrated into the Frame Maintenance URL of the corresponding frames to regulate the user's access. As discussed earlier in this section, Departments are created under Department Main and detailed in the *Jump Start Guide-M5 System Management Overview* document.

The Chat Groups are used for creating message groups that can send messages under the Message Menu on the top Menu bar.

These groups may be assigned or authorized by double-clicking the group name or selecting it and by using the >> or << buttons.

Vendor Gateway tab

The Vendor Gateway tab allows you define the authorized and unauthorized vendor gateway states for user roles. To move a state from one column to another, select the state and use >> and << to move from authorized to unauthorized. Select SAVE after it is in the appropriate column.

Indirect Accounts tab

The Indirect Account tab allows you to authorize or unauthorize Indirect Account Groups for a specific user role. Use >> and << to move groups between the two columns.

Role Copy

A useful way to create a new role is to use the Role Copy frame to create a new role from an existing role.

Use the FIND button to select the existing role you want to copy. Then input the name for the new role and its description. Select SAVE to create the role. This is a useful tool for creating new roles but be sure to review all the fields on each tab of the new role to ensure that you have all the new details correct.

Delete a Role

From the Role Maintenance frame select the Role you want to delete or select FIND. Select DELETE on the tool bar. You will receive an Action Required message to confirm deletion.

Select the Delete button to confirm. You will not be able to delete a role if it is in use elsewhere in the system.

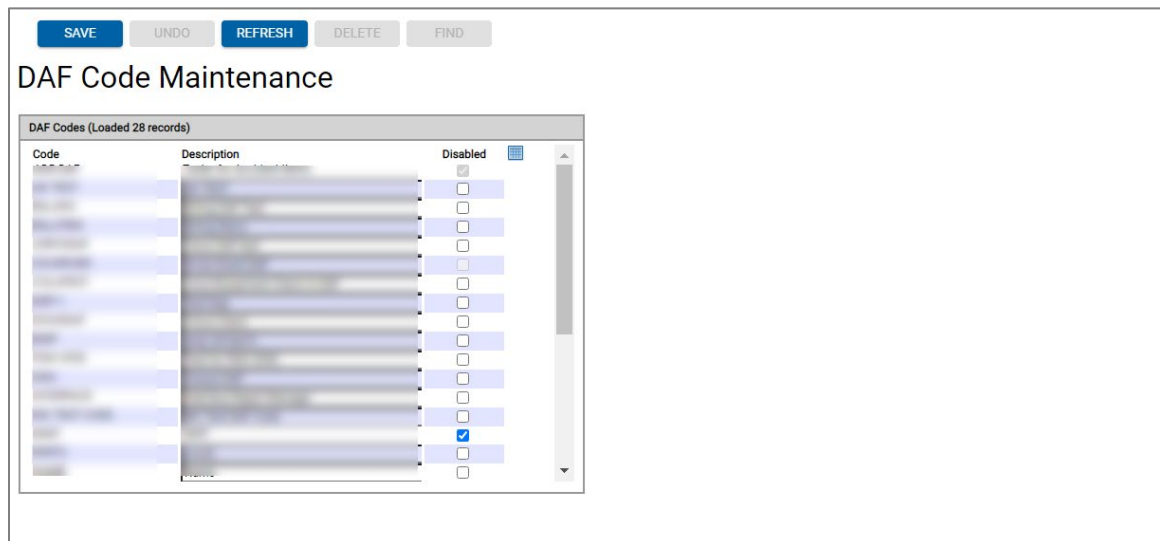
Customer Data View Users

To use customer views, a role must first be set up.

1. In the Role Maintenance frame create the Role, include a description, and make sure the Outside User checkbox is selected.
2. Under the Departments tab you also need to add the Authorized Departments this outside customer is allowed to use.
3. If you have not already created the Department group you need to do that before creating the role.

Departments are created on the Department Main frame and that process is reviewed in detail in the *Jump Start Guide-M5 System Management Overview* document you received during the implementation of your system.

DAF Code Maintenance

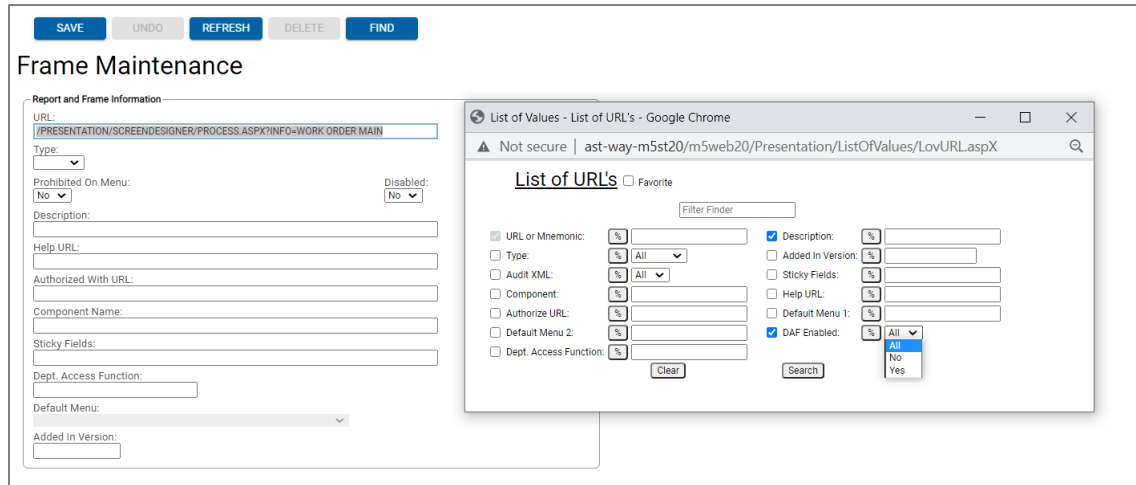


The DAF Code Maintenance frame is used to manage and create DAF codes. To add a new code scroll to the bottom of the list and enter the new Code name and description in the empty row. Select SAVE to update the record.

Note: There is a Disabled checkbox for each code. This can be used to block usage of the code since they cannot be deleted after they are used in a data record.

Frame Maintenance for the DAF Code

After the new DAF Code is created the next step is to assign it to a specific URL in the Frame Maintenance frame. The URL must be designated as DAF Enabled in order to do this. Open the Frame Maintenance frame and double-click in the URL field to open a search window. In the List of URL's window, select the DAF Enabled checkbox and set its value to Yes. Select Search.



From the list that is produced, double-click to select the URL for the new DAF code.

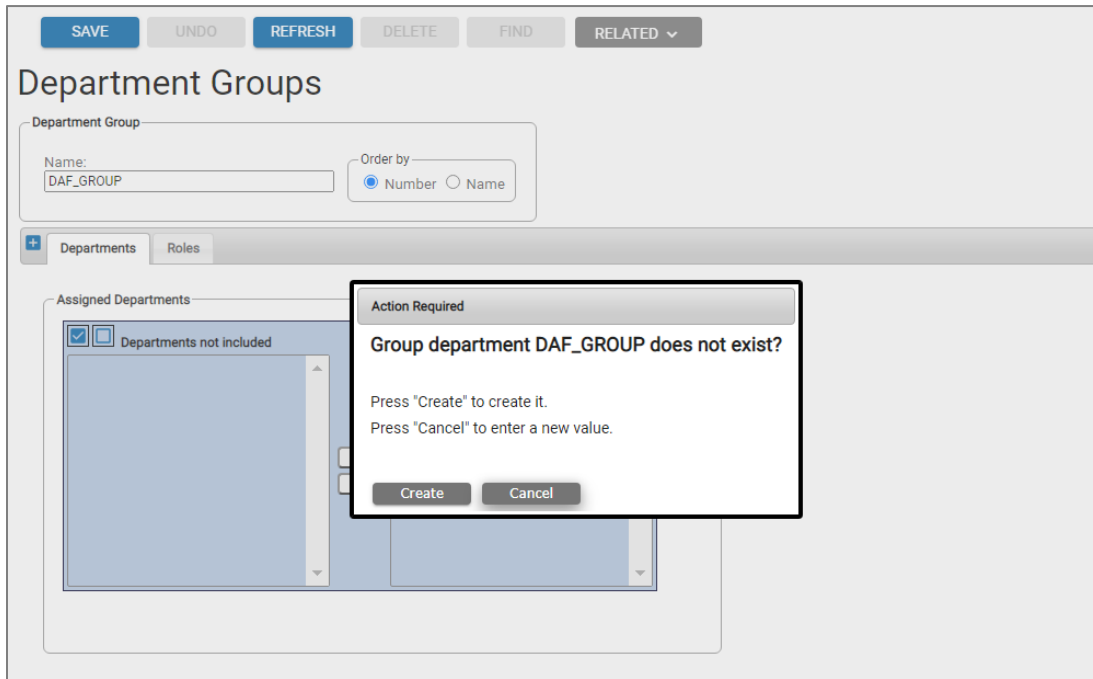
Note: The list displays Y in the DAF Enabled column.

Now with the URL loaded into Frame Maintenance, double-click in the Dept Access Function field and see a list of available DAF Codes that can be applied. Double-click on the code you want to use.

The new code name will be added to the DAF field. Select SAVE to update the record. Now with the new DAF Code created and assigned to URL the next step is to add it to a new Department Group.

Create New DAF Department Group

Open the Department Group frame and enter the department group name. Select Create to create the new department group. Select SAVE to update the record.



Double-click on the department name on either side of the window to include or exclude them from Department Group.

Department Group Level Security

DAF Name	Owning Dept Access	Using Dept Access
ADR DAF	Update	Update
AK TEST	None	None
BILLING	Update	Read Only
BILLITEM	None	None

The Department Group/DAF Maintenance frame allows the Department Level Security codes to be configured according to each department group. Double-click in the Department Group field and select your group. Each Department Level Security code created will be listed and the choices for Using or Owning departments are Update, Read Only, or None. In this example for LIMITED, BILLING is set to update for the owning department and read-only for the using department.

Now, the last step is to return to the Role Maintenance frame and on the Departments/Chat Groups tab find the correct Role and add the new Department group to its assigned groups.

Select SAVE to update the record.

After a frame is enabled with DAF Security, the user receives the message below if they try to access a frame that is blocked by the department security code level.

For troubleshooting purposes on frames that have DAF implemented, a message window appears when you move your cursor over the protected field. It will look similar to the one below.

```

/PRESENTATION/SCREENDSIGNER/PROCESS.ASPX
INFO=UNIT MAIN
No security template is in effect
Department security CODE 4 is in effect
Screen is in full access mode.
    
```

Database Users

Role	Name
88888888	88888888
ACOMP	Associate Component Test
ADH1	Adhoc1
ADH2	Adhoc2

If you are using Oracle for the database in your M5 System you will need to create database usernames. SQLServer does not require them. The database user is assigned to the Role and multiple roles can use the same database user ID. This reduces the number of distinct database users you have to create and manage.

As part of your implementation planning you should consult with your Oracle DBA and create database users that are consistent in style with the current database username structure. M5 is delivered with a database username of CSI already created.

! **DO NOT MODIFY THE CSI DATABASE USER.** It is used for installing and configuring your M5 system.

Open the Database User Maintenance frame to create and maintain these user IDs. To create a new ID enter the new name in the User ID Field and press Tab. Select Create in the Action Required window and then enter a description and a password for the ID.

If the password you select does not meet the system security requirements you will see an error message.

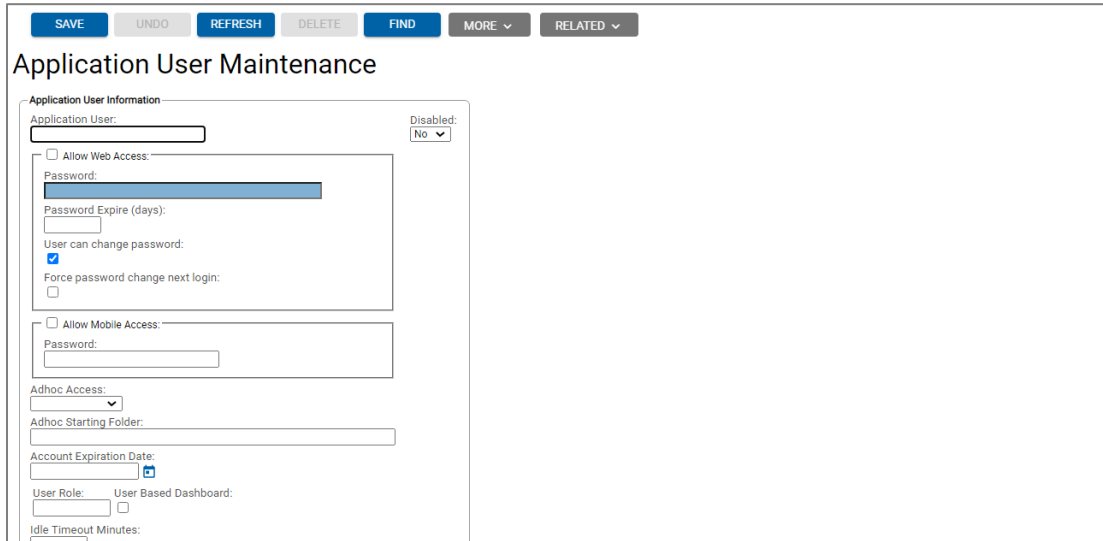
The password must use at least two lower case letters, no upper case, no numbers and may contain # \$ + = _ . Select back in the password field and enter a valid password and SAVE to update the record.

After being created, the database user can be assigned to the Role on the General tab of the Role Maintenance frame.

Application User

Application Users are the individuals who log into the M5 System as part of their job function. Everything they can do in the M5 System must be well defined and assigned to them specifically.

The majority of the Application User's capabilities are controlled through the Roles they are assigned in Role Maintenance. However, there are some additional items that can be customized after the User ID is created. Creating and maintaining the Application User ID is done on the Application User Maintenance frame.



The screenshot displays the 'Application User Maintenance' interface. At the top, there is a navigation bar with buttons for 'SAVE', 'UNDO', 'REFRESH', 'DELETE', 'FIND', 'MORE', and 'RELATED'. Below this, the main title 'Application User Maintenance' is centered. The form is organized into several sections:

- Application User Information:** Includes a text field for 'Application User', a 'Disabled' dropdown menu set to 'No', and a checkbox for 'Allow Web Access'.
- Web Access Settings:** A sub-section containing a 'Password' field, a 'Password Expire (days)' field, a checked checkbox for 'User can change password:', and an unchecked checkbox for 'Force password change next login:'.
- Mobile Access:** A section with an unchecked checkbox for 'Allow Mobile Access' and a 'Password' field.
- Adhoc Access:** Features a dropdown menu for 'Adhoc Access' and a text field for 'Adhoc Starting Folder'.
- Account Expiration:** Includes a date field for 'Account Expiration Date' with a calendar icon.
- User Role:** A dropdown menu for 'User Role' and a checked checkbox for 'User Based Dashboard:'.
- Idle Timeout:** A field for 'Idle Timeout Minutes'.

The Application User Maintenance frame allows you to create and manage the user accounts for the individuals who use the M5 System as a part of their job function within the fleet organization. It is important that System Administrators take the time to carefully define user capabilities and assign them accordingly.

Proper management and configuration of Application User IDs means controlling user access to the parts of the system they need to perform their jobs while preventing access to parts of the system that are not within the scope of their position. Through the Application User Maintenance frame, you can accomplish this by properly defining their roles and security rights.

The majority of the Application User's capabilities are role-based. You can create and configure Application User Roles and edit privileges on the Role Maintenance frame. However, there are some additional items that you can customize at the user level after you create the Application User ID.

Application User Information

- Application User - This is the user name that the assigned user will use to log into the M5 System. This field has a limit of 60 alphanumeric characters.

Allow Web Access - Since M5 is a web application that runs in a browser, select the checkbox to allow the user web access to the system.

- Password - Password criteria depends on the System Flag settings listed below.
- Password Expire (days) - If passwords expire, enter the number of days for which they are valid.
- User can Change Password – Select the checkbox to allow the user to change their own password.
- Force Password Change Next Login – Select the checkbox to force the user to change their password the next time they login.

Allow Mobile Access - To allow mobile access through a handheld device for MobileFocus, select the checkbox and enter a password.

- Adhoc Access - Select the level of Adhoc access for the user. Options are None, Run Reports, Create Reports, and Report Admin.
 - None – No access.
 - Run Reports – The user is allowed to only run reports, not create them.
 - Create Reports – The user is allowed to create and run reports.
 - Report Admin – The user is allowed to create and run reports as well as have certain administrative rights on the Ad-hoc Query frame.
- Adhoc Starting Folder - Allows each user to have a distinct starting point in the Adhoc report directory. The value specified will be appended to the value of the M5 Param for ADHOC_REPORT_PATH. The path must exist in order to specify this value here on the App User Maintenance frame.
- Account Expiration Date - You can set an expiration date for the user account in this field.
- User Role - Enter a valid role from Role Maintenance that corresponds to the users position or double-click in the field to select one from the list of values (LOV).
- Idle Timeout Minutes - The system will log the user out after this many idle minutes.
- Crystal Enterprise User - Enter the Crystal Reports User ID, if applicable. See Report User Pool if pooling crystal users.
- Crystal Enterprise User Password - Enter the password here.

- Crystal Enterprise Output Path - Enter the output path for the user when they run Crystal Reports.
- HomePage - You can assign a custom home page for the user here.
- Logon Failures - Read-only. Displays the number of failed login attempts for the user.
- Last Logon - Read-only. Displays the date and time of the last login for the user.
- Starting PMM Location Hierarchy - If using PMMs and this user has access, enter the beginning location hierarchy in the Starting PMM Location Hierarchy field.

Application User Identity

- Name - This is a required field. Enter a name to identify the Application User.
- Unique ID – This is a required field. Each Application User must have a Unique ID.
- Employee No. - To associate an Application User with an employee from Employee Main. Certain functionality in M5 will look to see if there is an employee ID associated with the Application User as a way of defaulting in that employee ID in certain frames, such as Part Issue Request.
- Division - If the Application User belongs to a certain division within the organization, enter it here.
- Department – If the Application User belongs to a certain department within the organization, enter it here.
- Department Group – Enter the Department Group of the department the Application User belongs to.
- Phone - Enter a contact number for the Application User, if applicable.
- E-mail - Application User email address. If entered, M5 will automatically send emails to this address if this person every runs any batch processes.

You can also use the Application User Copy frame to create a new application user from an existing application user. When you use this feature the frame applies the existing application user information to the new application user. Enter the name of the User ID to copy, then the new ID, password and name information.

SAVE **UNDO** **REFRESH** **DELETE** **FIND** **MORE** **RELATED**

Application User Copy

Existing Application User

Id: **Name:**

New Application User

Id: **Password:**

Name: **Unique Id:**

To delete an Application User, enter the User ID you want to delete, select DELETE and confirm the Delete Action. Keep in mind you also have the option of Disabling the User ID as well. There may be an administrative reason to disable it and stop the user's access without fully deleting the account.

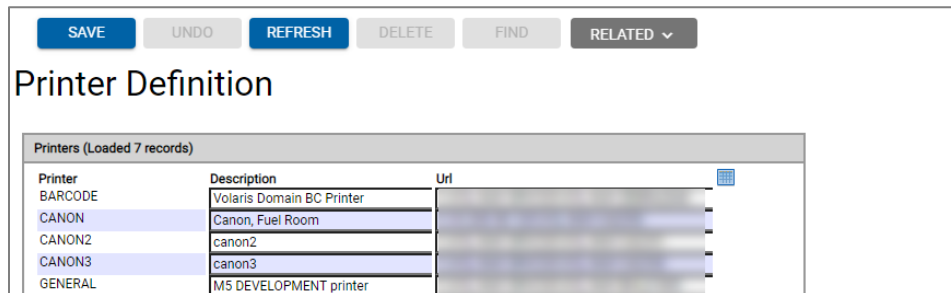
Crystal Enterprise

There are several programs within M5 that are tailored to those users using Crystal Enterprise. Each of these frames and how to use them are listed below.

Printer Definition

The printer definition is used to create each printer that will be used with Fleet Focus M5 and where it is located (by the URL).

To create a new printer, Open the Printer Definition frame, and follow the steps below.



1. The bottom row of the window is blank, select there and enter the new Printer Name in the Printer Column.
2. Enter the Printer Description.
3. Enter the URL for the printer. You can continue to add more printers as needed.
4. Select the SAVE button.

To delete a printer definition

1. In the Printer Definition window, select the printer to delete.
2. Select the DELETE button and the printer highlights in red.
3. Select the SAVE button.

Printer Assignment

SAVE
UNDO
REFRESH
DELETE
FIND
RELATED ▾

Printer Assignment

User Information

Application User: Name:

Printer assignments (Loaded 10 records)

Print Type	Prompt at Run Time	Printer Code	Printer Description
Default	<input type="checkbox"/>		
Work Order	<input type="checkbox"/>		
Motor Pool Ticket	<input type="checkbox"/>		
Motor Pool Invoice	<input type="checkbox"/>		
Put Tickets	<input type="checkbox"/>		
Count Sheets	<input type="checkbox"/>		
Purchase Order	<input type="checkbox"/>		
Cost Detail Report	<input type="checkbox"/>		
Bar Codes	<input type="checkbox"/>		
Card Embosser	<input type="checkbox"/>		

The Printer Assignment frame is used to identify each application user, the printer used to print certain report types such as work orders, motor pool tickets, put tickets, and count sheets (parts physical inventory) for direct printing. After you define your printers, follow the steps below to create the printer assignment.

1. Open the Printer Assignment frame.
2. M5 automatically enters the current Application User or you can enter one manually or double-click and look one up.
3. Double-click in the Printer Code field and the list of available printers opens. Select the printer you want to add. The first printer type is the user's default printer. Assign a print code for each printer type on the user's list as needed. The print types listed are system assigned based on the applications the user has access to.
4. Select the SAVE button.

Report User Pool

The Report User Pool stores the Crystal Enterprise usernames and passwords to be used if the client has a Crystal Enterprise license that is shared. The Application User Maintenance Frame includes a checkbox that indicates the pooling of Crystal Enterprise licenses. If the checkbox is selected, pooling is in use. Follow the steps below to set up the Crystal User and licenses in the Report User Pool.

1. Open the Report User Pool frame.
2. Enter the Crystal Username.
3. Enter the Password.

4. Enter the number of concurrent licenses.
5. Select the SAVE button.

Delete a Report User Pool name

6. Select the Crystal User to delete.
7. Select the DELETE button.
8. Select the SAVE button.

SAVE
UNDO
REFRESH
DELETE
FIND

Report User Pool

Crystal Codes

Crystal User:

Password:

Concurrent Licenses:

There are two frames that can be used to monitor the status of reports that are scheduled to run automatically. If the report failed to run for any reason it will be shown on both frames with the cause of the failure listed. Both reports allow the user to enter the maximum reports to retrieve. You can select a specific user and status. The default is for all users and all status types.

Crystal Enterprise Monitor Company

Company shows all reports by company.

SAVE
UNDO
REFRESH
DELETE
FIND

Crystal Enterprise Monitor - Company

Query Limits

Maximum reports to retrieve: User: Status: Show Selection Formula:

Crystal Enterprise Reports (Loaded 10 records)											
Id	State	Report Name	Submitted	By	Group	Recurring	Output Format	Destination	Start time	End time	Next time
64029	Completed		18/11/2020 22:00:51		ADMINISTRATOR		Pdf	Bin		20/11/2020 22:00:00	
63999	Completed		17/11/2020 22:00:14		ADMINISTRATOR		Pdf	Bin		19/11/2020 22:00:00	
63953	Completed		17/11/2020 09:31:48				Excel	Bin			
63933	Completed		16/11/2020 22:00:36		ADMINISTRATOR		Pdf	Bin		18/11/2020 22:00:00	
63896	Completed		16/11/2020 11:51:19				Pdf	Bin			
63877	Completed		16/11/2020 11:45:25				Pdf	Bin			
63857	Completed		15/11/2020 22:00:58		ADMINISTRATOR		Pdf	Bin		17/11/2020 22:00:00	
63810	Completed		14/11/2020 22:00:19		ADMINISTRATOR		Pdf	Bin		16/11/2020 22:00:00	
63561	Completed		09/11/2020 22:03:02		ADMINISTRATOR		Pdf	Bin			
63546	Recurring		09/11/2020 21:56:23		ADMINISTRATOR	Yes	Pdf	Bin			19/11/2020 22:00:00

Crystal Enterprise Monitor User

User shows all reports by the current Application User. The user in this example does not have any reports.

To change the Maximum Reports to retrieve, select the field and enter the new number and press Tab. To change the status of the reports shown, select the status dropdown to select All, Executing, Completed, Pending, Recurring, or Failed. Press Tab.

Report Log Administration

Saved Reports

When AssetWorks delivers updated Crystal Reports they need to be republished in Business Objects XI. This process involves deleting the previous version of the report in order to replace it. If this report has a scheduled run set to execute automatically it is lost in this replacement process. The Report Log Admin frame was developed for this process.

This frame allows the user to view all the parameter information for all reports submitted to Crystal Enterprise, not just recurring ones. This frame only queries the captured information and does not reflect the state of the report inside Crystal Enterprise. A link is provided to the Crystal Enterprise Monitor frame.

This frame provides the ability to re-establish the recurring reports. After a patch or upgrade is applied the administrator queries the recurring reports in the report log and then selects the icon on the toolbar that requests that the reports be rescheduled.

The Report Log Admin frame is an M5 administrator frame and access must be restricted to the System Administrator only.

Report Options

This allows the user to replace a standard report with a custom report or an alternative. The M5 report is listed in the report name area on the left side of the frame. The client replacement is listed on the right side of the frame. It can also be used to change the execution group for a report. The choices for the execution group is Long, Medium, or Immediate.

The screenshot shows the 'Report Options' interface. At the top, there is a toolbar with buttons for SAVE, UNDO, REFRESH, DELETE, and FIND. Below the toolbar, the title 'Report Options' is displayed. The main content area is titled 'Report Options (Loaded 1 records)'. It contains a table with the following data:

Report Name	Client Replacement	Execution Group
/REPORTS/WORKORDER/WOWORKSHEET.RPT	/REPORTS/CUSTOM/CRYWOWORKSHEET.RPT	Long
		Long

Report Alternate

This frame allows the user to change the report name of a custom report. Report Options is still needed to say which custom report is replacing the M5 report.

The screenshot shows the 'Report Alternate' interface. At the top, there is a toolbar with buttons for SAVE, UNDO, REFRESH, DELETE, FIND, and RELATED. Below the toolbar, the title 'Report Alternate' is displayed. The main content area is titled 'Report Alternates (Loaded 5 records)'. It contains a table with the following data:

Report Name	Alternate Report	Alternate Description
/REPORTS/GENERICTEMPLATES/GENUNITWOFILTERS.RPT	/REPORTS/CLIENTDEVELOPED/TOTALROADCALLS.RPT	
/REPORTS/LABOR/LABORDIR.JNL.RPT	/REPORTS/LABOR/LABORDIR.JNL.RPT	
/REPORTS/LABOR/LABORINDIR.JNL.RPT	/REPORTS/LABOR/LABORINDIR.JNL.RPT	
/REPORTS/LOCATION/LOCCOSTHIST2.RPT	/REPORTS/LOCATION/LOCCOSTHIST2.RPT	
/REPORTS/UNIT/UNITPMJOBSCHED.RPT	/REPORTS/CUSTOM/ANCPRODISSUE.RPT	

Run Immediate Purge

For customers that print a create deal of reports in run immediate mode, this program helps manage the report in bin by purging run immediate jobs. To run this program open the Interface Manager frame. Select the Interface field and enter Run Immediate Purge or select the arrow and find it on the list.

The user determines how often to purge the run immediate jobs from the in-bin using the interface parameters.

The screenshot shows the 'Interface Manager' application. At the top, there are buttons for 'SAVE', 'UNDO', 'REFRESH', 'DELETE', and 'FIND'. Below these is a dropdown menu for 'Interface:' with 'Run Immediate Purge' selected. The main area contains a table titled 'Interface Parameters (Loaded 2 records)'. Below the table is a 'Refresh' button. Underneath is a table titled 'Current Execution Schedule (Loaded 0 records)'. At the bottom, there is a 'Schedule Details' section with a 'Run Interval:' dropdown set to 'Once' and an 'Exclude weekends and holidays:' checkbox.

Number	Description	Value
1	PURGE DAYS OLD	30
2	M5SITE	M5ST20RA

ID	Description	Status	Schedule Date	Last Run	Frequency	Exclude Holidays	Submitted By	Run Desc
No records loaded.								

Run Interval: Once Exclude weekends and holidays:

System Version


This frame displays the current Version, Release and the last time the database tables were updated.

The screenshot shows the 'System Version' application. At the top, there are buttons for 'SAVE', 'UNDO', 'REFRESH', 'DELETE', and 'FIND'. Below these is the title 'System Version'. At the bottom, there are two text fields: 'Current TMS Version (MM/DD/YYYY HH:MI:SS):' and 'Current Release:'.

Current TMS Version (MM/DD/YYYY HH:MI:SS):

Current Release:

M5 Params Maintenance Frame

 For a complete list of M5 Parameters, see [Appendix C](#).

The Params Maintenance frame is an important frame that shows parameter settings that were made during the installation of your system. It can be very helpful when troubleshooting an issue with the system.

The frame also allows you to view and edit M5 Parameter values within the application itself. To view the list of available parameters, select the dropdown menu and from the following options select, All Groups, Ad Hoc, Attachments, Database, Defaults, External Auth, Installation, Limits, Localization, Logon, Multi-Currency, Reporting Server, and User Preferences.

After you make your selection the parameters will load on the M5 Params i-frame. To change or edit a parameter select the Value field of the parameter you want to change. A description of the parameter and its options appears to the right of the i-frame when you select in the row. Scope is not an editable field.

When you are finished entering a value, select SAVE to update the changes.

Two fields on the M5_PARAMS table allow you to specify how they want users to log in:

1. The CE_EMAIL_DOMAIN specifies the email domain, such as assetworks.com. This email domain is ADDED TO or REMOVED FROM the login value the user types in when logging on to M5.
2. The LOGON_DOMAIN_SPECIFICATION field specifies whether the domain should be ADDED TO or REMOVED from the value the user types in.

The options are:

- A - To add
- R - To remove
- N - Do nothing. Leave the value as the user typed it.

Example of A

- Application user as created in m5 is johndoe@assetworks.com.
- ce_email_domain is assetworks.com.
- logon_domain_specification is A.
- User types in johndoe / password on the M5 logon page.
- System appends @assetworks.com onto the login value, and logs user in as johndoe@assetworks.com.

Example of R

Using the same user as above:

- If user typed johndoe@assetworks.com as the login name, the system would REMOVE @assetworks.com, making the login user johndoe, and because the user does not exist, user get an invalid logon message.
- Actual use for R would be having users set up WITHOUT a domain specified on the application user, but user login using the domain. M5 then removes the domain so the user can log in successful (for example, if user is set in M5 as jane.doe and user logs in as jane.doe@assetworks.com the system will remove the @assetworks.com portion the user typed in, and log user in successfully as jane.doe).

N treats the value the user types in as the value to be used. It does not alter it, so value typed in must exist as an application user.

M5 Parameter Query Frame

The M5 Params Maintenance frame shows critical information on the M5 System. It's a very important frame and is often used in troubleshooting to view technical settings that were made during the installation. No parameters can be changed from this frame. Refer to M5 Parameter Maintenance above.

The M5_PARAMS table contains customizable settings that affect all companies in the database. It contains information about installation directories, machine names and shared directories. It must be configured before M5 is started. The easiest way is to use SqlDeveloper for an Oracle database or Query Analyzer for SQL Server.

For more information please contact M5 Support or consult the *M5 Installation Procedure Install Guide* for more information about the M5 Install and configuring the M5_Params.

System Performance Monitor

This frame is used to troubleshoot system performance issues. It is used to capture the performance statistics within a given time frame.

For this data to be captured, a setting must be activated on the application server. Since it is recording system activity, it will affect the system performance, so it is recommended that the monitoring be turned off as soon as the troubleshooting activities are completed.

When you open the frame, you need to select the time frame you want to monitor. You can select a date and time from the calendar and AM/PM squares, or you can also use the Now button to quickly choose the current date and time.

When the range is set, you will see the statistics appear in the columns. Remember to turn the monitoring off when you are through with your troubleshooting.

SAVE
UNDO
REFRESH
DELETE
FIND

System Performance Monitor

Analysis Time Frame

Mode: Performance From: To: Refresh

Frames Executed (Loaded 0 records)

Frame	Times Executed	Min Milliseconds	Max Milliseconds	Average Milliseconds	Total Milliseconds	Number Of Saves	Min Save Milliseconds	Max Save Milliseconds	Average Save Milliseconds	Total Save Milliseconds

System Activity Monitor

The System Activity Monitor frame should only be used under the guidance of the M5 Installation and Support Team. It requires the activation of the Record_Performance parameter.

SAVE
UNDO
REFRESH
DELETE
FIND

System Activity Monitor

Filter

View Start Time: Highlight Water Mark:

Frame: Application User:

Retrieve

Time 3 4 5 6 7 8 9 10 11 12 13 14 15 16 17 18 19 20 21 22 23 24 25

Active User Query

This frame displays the application users currently logged into M5 and the last frame they accessed. This is an administrator level frame that shows all active users in M5. It is not company specific.

If the “?” appears in the User column, it means that a user went to the logon screen but never logged on. Multiple rows of the same user means they are logged in multiple times. This can happen when they do not close the previous session or something happened that prevented them from being able to log off normally. If the browser crashes or power is lost to the computer this will happen.

The screenshot shows the 'Active User Display' interface. At the top, there are buttons for 'SAVE', 'UNDO', 'REFRESH', 'DELETE', 'FIND', and 'RELATED'. Below these is the title 'Active User Display'. Underneath, there is a 'Users' section with 'Licensed: Unlimited' and 'Active: 1' (with a 'Reload' button). The main part of the interface is a table titled 'Active Users (Loaded 3 records)'. The table has the following columns: Company, User, Login, Last Frame, Last Activity, Idle, IP Address, and Requests. The 'Requests' column has a small bar chart icon next to it. The table contains three rows of data, with the first row highlighted in blue. The data is partially obscured by blurring.

Company	User	Login	Last Frame	Last Activity	Idle	IP Address	Requests
*							800
*							7
*							44

View Log Files in M5

The Log Viewer frame allows for the viewing of log files within the M5 application. Log Viewer functionality stores logs in a standardized location and the new frame allows users to view, download, and Email log files from M5.

Logs are broken into the following sections:

- Batch
- Business Components
- Interfaces
- M5Web
- Other

To view a log file, select the + mark next to the section you want to view. The list of available files display. Select the hyperlink to download and view a specific log file.


To email a log file, select the checkbox in the Email column. Enter a to and from email address and a subject and select Send Email.

SAVE
UNDO
REFRESH
DELETE
FIND

Log Viewer

Log File Viewer (Loaded 205 records)

Email	Log Name	Size	Type	Modified	Created
	BATCH				
	D202011				
<input type="checkbox"/>	mSstt20a_M5RptEngine	4964711	log	11/20/2020 3:03:31 AM	11/1/2020 12:00:30 AM
<input type="checkbox"/>	mSstt20a_AW_CURRENCYEXCHANGESERVICE_77542	952	log	11/19/2020 5:00:34 PM	11/2/2020 5:00:32 PM
	mSstt20a_AW_CURRENCYEXCHANGESERVICE_77542	443	cmd	11/19/2020 5:00:30 PM	11/2/2020 5:00:31 PM
<input type="checkbox"/>	mSstt20a_AW_M5-BARLAB-BATCH_77544_EN-US	45442	log	11/19/2020 2:25:33 PM	11/1/2020 2:25:31 PM
<input type="checkbox"/>	mSstt20a_AW_M5-BARLAB-BATCH_77544	970	log	11/19/2020 2:25:31 PM	11/1/2020 2:25:31 PM
	mSstt20a_AW_M5-BARLAB-BATCH_77544	550	cmd	11/19/2020 2:25:30 PM	11/1/2020 2:25:30 PM
<input type="checkbox"/>	mSstt20a_AW_M5-WMI-COUPA-PO-IN-INTF_77739	678	log	11/19/2020 9:47:32 AM	11/19/2020 9:47:32 AM
	mSstt20a_AW_M5-WMI-COUPA-PO-IN-INTF_77739	461	cmd	11/19/2020 9:47:31 AM	11/19/2020 9:47:31 AM
<input type="checkbox"/>	mSstt20a_AW_M5-WMI-COUPA-PO-IN-INTF_77738	678	log	11/19/2020 9:46:32 AM	11/19/2020 9:46:32 AM
	mSstt20a_AW_M5-WMI-COUPA-PO-IN-INTF_77738	461	cmd	11/19/2020 9:46:30 AM	11/19/2020 9:46:30 AM
<input type="checkbox"/>	mSstt20a_AW_M5-ENDOF-DAY-BATCH_77504_EN-US	32824	log	11/19/2020 9:44:55 AM	11/1/2020 8:46:32 AM

 For more information on the setup and configuration for this frame please refer to the *Configure Log File Viewer QRG* for more details.

Security Logging

Security Logging allows the System Administrator to select a security event and log its activity. M5 comes with a standard list of security events that can be activated and set for monitoring. After the events are selected they can be viewed as they occur.

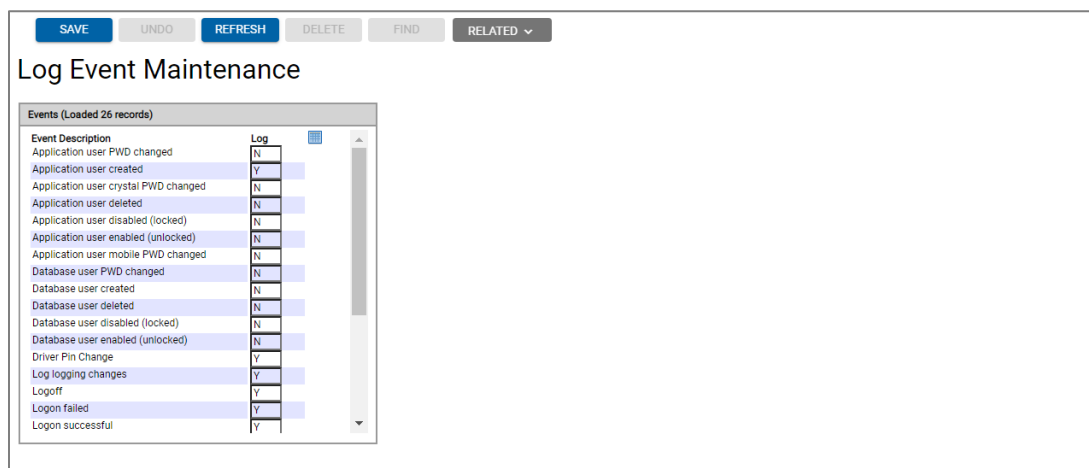
There are two frames used to achieve this. First the Events must be selected in Log Event Maintenance then they can be viewed in Log Event Viewer.

Log Event Maintenance

The Log Event Maintenance frame is used to activate logging of security events. Select the Log column to select Y (Yes) or N (No) to turn logging on and off for the event. The events that can be logged have been created by AssetWorks and cannot be modified by the customer.

Events that can be logged

- Application user crystal PWD changed
- Application user disabled (locked)
- Application user enabled (unlocked)
- Application user mobile PWD changed
- Database user disabled (locked)
- Database user enabled (unlocked)
- Log logging changes
- Logoff
- Logon failed
- Logon successful
- Privilege Granted
- Privilege Revoked
- Role Created
- Role Deleted
- Session idle time out



Log Event Viewer

After the event is set to be logged, it can be filtered and displayed using the Log Event Viewer frame. Filtering allows you to view only records matching a certain criteria. At least one filter must be selected to retrieve log information. Select the Enabled checkbox to select your filter and configure the numeric operator and values to match your desired criteria. Select the Retrieve button to display the event matching your selections.

Note: There is no automated purge process for the log event table. To prevent the tables from growing too large rows need to be manually cleared periodically by your DBA.

The screenshot shows the Log Event Viewer interface. At the top, there is a toolbar with buttons for SAVE, UNDO, REFRESH, DELETE, FIND, and RELATED. Below the toolbar is the title "Log Event Viewer". Underneath is a "Filters (Loaded 0 records)" section. This section contains a table with the following columns: Enabled, Field, Operator, Value, and High Value. The first row is checked and shows "Date/Time(-3 hour(s))" with the operator "greater than" and value "BOD". Other rows for "App User", "Role", and "Event" are unchecked. Below the filters is a "Retrieve" button. At the bottom, there is a "Log Event Data (Loaded 0 records)" section with a table header: Time, App User, Role, Event, Message, Information.

Table Auditing (for Oracle Clients only)

Numerous transactions are already audited in journal tables whose data does not change after the record has been created. After a transaction has been written to one, it remains forever.

Example:

- meter_jnl: Any change to a unit's meter.
- part_jnl: All inventory transactions, including creation of new parts and cross-references, issues, returns, order requests, orders, receipts, transfers, adjustments to quantity or price, and merges of one part number into another.
- unit_capital_jnl: Changes to a unit's capitalized value, whether manually or from work orders.
- unit_status_hist: Changes to a unit's status or status-triggering dates, such as in-service date.
- o_labor_chg, o_part_chg, and o_comm_chg: Charges to work orders.

- acc_lab_chg, acc_part_chg, and acc_comm_chg: Charges to indirect accounts.
- f_comm_prod_chg, f_unit_prod_chg: Fuel charges to units.

Some tables that look like transaction tables can be modified through the application so they cannot be relied upon as an audit trail.

For example, unit_asgn_hist is a table that keeps the start and end dates of unit associations to owning and using departments, but users can change these dates through a frame. If in doubt, consult AssetWorks to confirm whether a particular table's records do not change once created.

For tables that are not reliable journal tables, a standard M5 table called audit_table_column contains the audit trail data. It can be customized on the Table Column Audit frame.

For purposes of the audit record, the updating session is the one running on the application server or batch server. In other words, the host is not the user's PC running M5 but is the server running the application components.

Table Column Audit

The Table Column Audit frame is used to designate the columns that will be established or removed from the audit data. The top of the frame asks the user for the table to audit. After the table is selected a list of data columns display.

The three columns on the right of the frame control if you wish to see when the data in the field was first inserted (Add), when it was deleted (Delete), or when it was modified (Updated). Select SAVE when you have defined the data columns for your audit.

SAVE UNDO REFRESH DELETE FIND

Table Column Audit

Table Fields Audit

Table Name: ACCIDENT_CATEGORY

Column Name	Column Description	Created Date	Add?	Delete?	Update?
ACCIDENT_CATEGORY	Accident category, primary key (PK).		<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
CHANGE_DT	The DATE that the last change occurred for the row.		<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
CHANGE_LOGIN_USER	LOGIN_USER who made the last change for the row.		<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
COMPANY	COMPANY; foreign key (FK) table/column is COMPANY_MAIN/COMPANY.		<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
DESCRIPTION	Accident Category description.		<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
DISABLE_FL	Disable flag		<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
MAINT_LOCK	Maintenance lock flag for the row.		<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>

Table Audit Query

After you define your Table Audit Columns you can use the Table Audit Column Query frame to display the audit records. Open the Table Column Audit Query frame and select the Table Name field to select the table. You may also select a specific User by entering their name in the User name field or select it from a list. In the Audit Type field select the down arrow to select All, Insert, Update, or Delete.

- The table that is selected determines what is shown in the First Key Values field. This value is usually the primary key for the table. For example, if `unit_dept_comp_main` is selected then the First Key Values heading changes to `UNIT_NO` Values. The user could then enter what unit numbers to query and view who made changes to those particular units.
- Second Key Values is a range of values of the second segment of the primary key. For example, if `unit_item.value` is audited, the first key value is the unit number and the second key value is the name of the unit item.
- New Data Values will search both the `old_value` and `new_value` for the data entered.
- Enter the date range of audits you would like to view in the Audit Date Range fields. It defaults to a calendar year ending on the current date.
- Select the Retrieve button when ready to search.

SAVE
UNDO
REFRESH
DELETE
FIND

Table Column Audit Query

Selection Criteria

Table Name: User:

Audit Type:

Key Values Data Ranges

First Key From: To:

Second Key From: To:

New From: To:

Audit Date Range

Start: End:

Query Results (Loaded 0 records)

Table Name	Column Name	Audit Type	Audit Date	Key Column Value 1	Key Column Value 2	Key Column Value 3	Key Column Value 4	Old Value	New Value	Frame	Terminal	App User	Audit ID	Sent Date
No records found.														

Frame Maintenance

Frame Maintenance can be used to change the description of a frame, report, or link in the M5 system. It is also used to add new frames and reports. Normally the System Administrator would not need to make changes to this frame and AssetWorks recommends that these settings be left with the default values.

When M5 is upgraded for a patch or a new release, the Run M5 Objects process updates Frame Maintenance with all new frames and reports. There is an option in this Object update that restores the frame descriptions to the M5 default values.

But if it's necessary, open the Frame Maintenance frame and follow the steps below to edit a frame.

The screenshot shows the 'Frame Maintenance' form with the following fields and values:

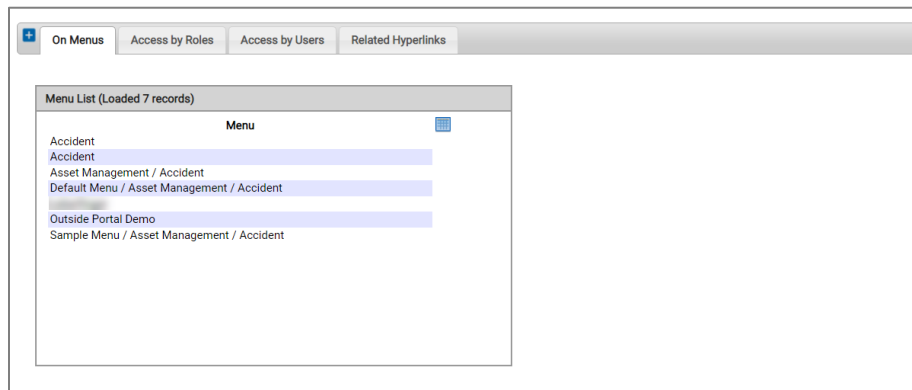
- SAVE** (blue button), **UNDO** (grey button), **REFRESH** (blue button), **DELETE** (blue button), **FIND** (grey button), **RELATED** (grey button with dropdown arrow)
- Report and Frame Information** (Section Header)
- URL:** /PRESENTATION/SCREENDESIGNER/PROCESS.ASPX?INFO=ACCIDENT
- Type:** Frame (dropdown menu)
- Audit:** No (dropdown menu)
- Prohibited On Menu:** No (dropdown menu)
- Disabled:** No (dropdown menu)
- Description:** Accident Entry
- Help URL:** /ACCIDENT_MODULE/ACCIDENT_ENTRY.HTM
- Authorized With URL:** (empty field)
- Component Name:** mfiveUCAccident.dll
- Sticky Fields:** ACCIDENTNO
- Dept. Access Function:** (empty field)
- Default Menu:** /Asset Management / Accident (dropdown menu)
- Added In Version:** (empty field)

Report and Frame Information

- Select the URL field to see the list of valid URL's. Double-click the selection.
- The Type choices in the dropdown menu are, Frame, Report, and Link. The Link option allows the user to add this link to a menu.
- Use the Audit feature with great caution as it will journal every detail and may cause performance issues within the database.
- Prohibited on Menu does not allow this frame to be added to a menu.
- Use the Disabled dropdown to disable this frame.
- The Description can be changed, as applicable. The description changes for the frame on the menu, frame, and report title.
- The Help URL is the link to the help document for this frame.
- The Authorized with URL has to do with frames within frames. For example, Work Order Main displays frames for Standard jobs and Warranty. Those frames are not authorized to be located on a menu but associated to the Work Order Main URL.

- Component Name is the main DB component behind the scenes.
- Sticky fields is used to transfer URL information as in an email including keys to identify specific information being entered or used on a frame. These are programmed in the M5 frame. The client cannot arbitrarily add a sticky field.
- Dept. Access Function. If you are using DAF (Department Access Function) security, then enter the security function that this frame is to take on. Please review the DAF Security functionality in this manual for further assistance.
- Default Menu is a future enhancement to create a standard default menu.
- Added in Version indicates which release this frame was added.
- Select SAVE to update the frame records.

Frame Maintenance tabs



- On Menu – Allows you to view what menus this frame appears on.
- Access by Roles – Allows you to view what user roles have access to this frame.
- Access by Users – Allows you to view what application users have access to on this frame. You can also view the role associated with the application user and what level of access they have (for example, FULL).
- Related Hyperlinks – Allows you to configure the list of related frames that display on the selected frame when the user hovers over the Related dropdown at the top of the frame.
 - To add a frame, double-click in the field to select it from the LOV. Define the Query String, Send Screen fields (sticky fields), and whether you want the frame to open in a new window. Select SAVE when finished.

To Delete a Frame

Select the URL for the frame and select the DELETE button on the toolbar. A confirmation window opens. Confirm the deletion and save the changes.

Company Definition

This frame is used to set up basic information about the company. The information entered on this frame appears on the Work Order Invoice Report and the division name is printed on the top right of every Crystal Report.

General tab

Displays the company Business Name & Address information:

- Corporate Name
- Web Address
- Division Name
- Logo File location
- Address
- State / Zip Code
- Country
- City
- Phone and extension number
- Short Name or any abbreviation desired
- Slogan

The screenshot shows a web application interface for 'Company Definition'. At the top, there are buttons for 'SAVE', 'UNDO', 'REFRESH', 'DELETE', and 'FIND'. Below these is a tabbed interface with 'General' selected. The 'Business Name & Address' section contains the following fields:

Corporate Name: <input type="text" value="Mech Serv Street 2 Out"/>	Short Name: <input type="text" value="Mech Srvs"/>
Web Address: <input type="text" value="www.assetworks.com"/>	Logo File: <input type="text"/>
Division Name: <input type="text" value="Fleet Services"/>	
Address: <input type="text" value="998 Old Eagle School Road"/>	State / Zip Code: <input type="text" value="PA"/> <input type="text" value="19087"/>
<input type="text" value="Suite 1215"/>	Country: <input type="text" value="USA"/>
City: <input type="text" value="Wayne"/>	Phone: <input type="text" value="6106879202"/> x <input type="text"/>
Zonar Mechanic: <input type="text" value="assetworks"/>	
Slogan: <input type="text"/>	

Remit To tab

Displays the accounting department Remit To information:

- Contact
- Phone and extension number
- Address
- State / Zip Code
- Country
- City
- E-Mail address
- Billing Instructions

The screenshot shows a web application interface for 'Company Definition'. At the top, there are buttons for 'SAVE', 'UNDO', 'REFRESH', 'DELETE', and 'FIND'. Below these is a tabbed interface with 'Remit To' selected. The 'Remit To' form includes the following fields:

- Contact:** AssetWorks
- Address:** 998 Old Eagle School Road, Suite 1215
- City:** Wayne
- Phone:** 6106879202
- State / Zip Code:** PA, 1908
- Country:** USA
- E-Mail:** (empty)
- Bill Instructions:** (large empty text area)

Account Template tab

Selecting the Use Direct Account Table option leaves the valid direct account number stored in the direct account table. No client configuration changes are necessary to keep existing account numbers. If you wish to use segmented account numbers, the Use Direct Account Table checkbox should not be selected.

Note: Do not add segments if the users do not intend to use the template function. Adding segments when using the Direct Account table can cause issues with the Direct Account Table functionality.

- The maximum number of segments is set to 20. The maximum number of characters including any delimiter is 100. All of the M5 Database fields for the Dir_Acct_No have been increased.
- Enter the type of delimiter wanted between each segment such as a dash or a slash.

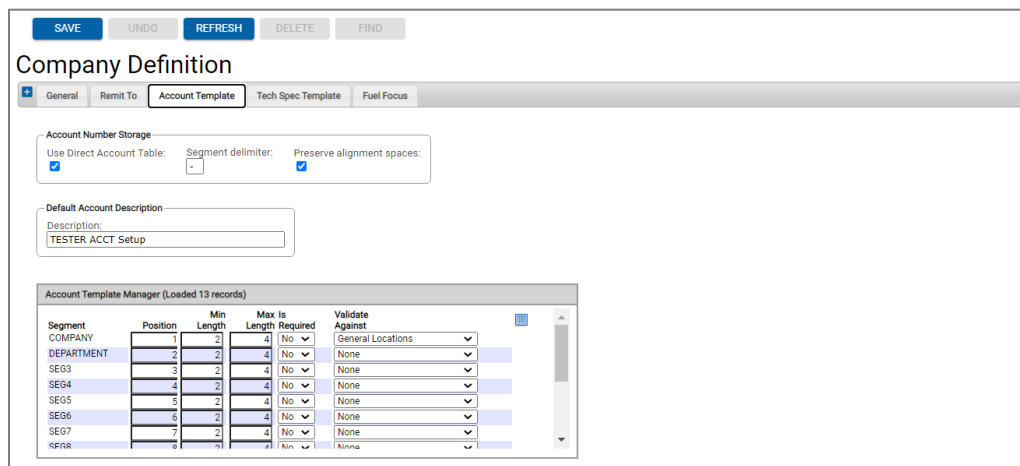
Complete the following remaining fields:

1. Select Preserve alignment spaces if you want placeholders. For example, in the example above for segment 1, the minimum length is 4 with up to 20 characters. If you want to hold the remaining 16 spaces, then select this checkbox. By preserving the spaces, all account numbers will have the same length.

2. Enter a Description of the account template.
3. Enter the Segment name.
4. Enter the Position in which the user should enter this particular segment.
5. Enter the Min Length of the segment.
6. Enter the Max Length of the segment.
7. If this segment Is Required, set the value to Yes.

Validate Against determines that validation is to occur for a given segment. The options for this field are:

- None – No Validation
- Departments – Validated against Dept_Main
- General Locations – Validated against Gen_Loc
- Organizational Hierarchy – These values will be dynamically loaded based upon the users Org_Hier table.



Tech Spec Template tab

Customers rely heavily on reporting by Tech Spec, MfgMkModel (MMM). They are also used in the definition of a Standard job. Normally your M5 project or support team will assist you in creating the Tech Spec Template. It is done on the Tech Spec Template Tab.

System Flag 5268 must be set to Y in order to create a new Tech Spec structure. The Tech Spec is normally structured in multiple segments. The example below shows a structure with six segments defined. Since the total length of the Tech Spec can only be 13 characters no additional segments can be defined for this one.

You are able to select an existing segment and modify it. You can also select the Validate column to add or modify a validation code for the segment. If you have character length still available on your frame you can select the bottom row and enter the new Tech Spec name in the Segment field.

1. Enter the label of the first segment of the tech spec in the Segment field.
2. Enter the starting position in the Position field.
3. Enter the length of the segment in the Length field.
4. If the segment should be validated against the manufacturer, make and model table, then select the MfgMkModel checkbox.
5. To create your own list of values for the segment, select the V icon in the validate column.
6. Select SAVE to complete your update.

The screenshot shows the 'Tech Spec Template Manager' window with 3 records loaded. The table is as follows:

Segment	Position	Length	MfgMkModel	Validate
YEAR	1	4	<input type="checkbox"/>	V...
MAKEMODEL	2	3	<input checked="" type="checkbox"/>	V...
USER	3	3	<input type="checkbox"/>	V...

Fuel Focus tab

This frame is to be used for splitting fuel information between servers. Each server will have its own database containing duplicate information for the commercial fuel vendors.

Enter the Web Service URL of the server to be connected to. Next enter the Commercial Vendor that resides in the second database. This vendor will be used for the internal unit fuel charge in the primary database. This vendor must reside in both databases

The screenshot shows the 'Fuel Focus' tab in the 'Company Definition' window. It contains a section titled 'Fuel Focus Splitter Information' with two input fields:

- Web Service URL: [Text Input Field]
- Commercial Vendor: [Text Input Field]

Fiscal Calendar

The Fiscal Calendar frame defines each fiscal period and is used for reporting. This calendar must be set for each year prior to the start of the first fiscal period.

Periods tab

1. Enter the Fiscal Year. Within the Action Required window, select Create to create fiscal year.
 2. Enter the Quarter, Period, and Period Start Date.
 3. Select SAVE.
- System Flag 1012 defines the number of periods in the fiscal year (12 or 13).
 - The Quarter must be 1, 2, 3, or 4.
 - The Period Start Date must be the first day of the month or fiscal period.
 - The Period Closed On date field displays after the End of Period process is run. Refer to Running End of Period.
 - The Billing Run Date, Billing Run By, Billing Closed On, and Billing Closed By fields display after the billing process is run. Refer to Running Billing.

Fiscal Calendar

+ Periods Years

Calendar Year

Fiscal Year:

2025 Billing Information (Loaded 12 records)

Quarter	Period	Period Start Date	Period Closed On	Billing Run Date	Billing Run By	Billing Closed On	Billing Closed By
<input type="checkbox"/>	1	<input type="text"/>	<input type="text"/>				<input type="text"/>
<input type="checkbox"/>	2	<input type="text"/>	<input type="text"/>				<input type="text"/>
<input type="checkbox"/>	3	<input type="text"/>	<input type="text"/>				<input type="text"/>
<input type="checkbox"/>	4	<input type="text"/>	<input type="text"/>				<input type="text"/>
<input type="checkbox"/>	5	<input type="text"/>	<input type="text"/>				<input type="text"/>
<input type="checkbox"/>	6	<input type="text"/>	<input type="text"/>				<input type="text"/>
<input type="checkbox"/>	7	<input type="text"/>	<input type="text"/>				<input type="text"/>
<input type="checkbox"/>	8	<input type="text"/>	<input type="text"/>				<input type="text"/>
<input type="checkbox"/>	9	<input type="text"/>	<input type="text"/>				<input type="text"/>
<input type="checkbox"/>	10	<input type="text"/>	<input type="text"/>				<input type="text"/>
<input type="checkbox"/>	11	<input type="text"/>	<input type="text"/>				<input type="text"/>
<input type="checkbox"/>	12	<input type="text"/>	<input type="text"/>				<input type="text"/>

Years tab

Complete the following steps to complete the creation of your fiscal calendar.

The Years tab allows you to define the Fiscal Year. It is a customer-specific area for aid in calculating vehicle lease rates. It can be loaded with inflation, interest, overhead and equity to determine fleet value.

Total Fleet Value Calculation displays the Total Fleet Value when you select the Calculate total fleet button.

1. Enter the Fiscal Year.
2. Complete the Inflation Rate, Interest Rate, Fleet Overhead, Return On Equity, and Total Fleet Value fields.
3. Select SAVE.

Fiscal Calendar

+
Periods
Years

Years (Record 8 of 8)

Year	Inflation Rate	Interest Rate	Fleet Overhead	Return On Equity	Total Fleet Value
2017	10.000	3.500	\$100.00	\$1,500.00	\$15,000.00
	10.000	2.500	\$200.00	\$9,000.00	\$9,200.00
	10.000	3.000	\$500.00	\$5,000.00	\$5,500.00
XXXX					

Total Fleet Value Calculation

As of date

Calculate total fleet

Total fleet value

0

Holiday Calendar

The Holiday Calendar frame tracks all Company Holidays on the Fiscal Calendar that are used when running the employee schedules. The Planned Absences batch process uses these dates in order to put the holidays on the Employee Time Card.

1. Open the Holiday Calendar frame to add dates.
2. Enter the Fiscal Year.
3. Select the Date field in the empty row to enter a date from the calendar. The Day of Week automatically displays.
4. Enter the Indirect Account code for the holiday.

5. Enter the Holiday Description.
6. Enter a Location Group or select from the Group Location List.
7. Select SAVE.

The screenshot shows the 'Holiday Calendar' application interface. At the top, there is a toolbar with five buttons: 'SAVE' (blue), 'UNDO' (grey), 'REFRESH' (blue), 'DELETE' (grey), and 'FIND' (grey). Below the toolbar, the title 'Holiday Calendar' is displayed. Underneath the title, there is a 'Holiday Year' section with a 'Fiscal Year' dropdown menu. Below this, a grey header bar reads 'Holiday Information (Loaded 0 records)'. The main area contains a table with the following columns: 'Date', 'Day of Week', 'Indirect Account', 'Holiday Description', and 'Location Group'. Each column has a corresponding input field below it. A small blue icon is visible at the end of the 'Location Group' header.

Mask Maintenance

The Mask Maintenance frame contains the formats for displaying time settings, date settings, currency, phone number, and address values on frames and reports. M5 is delivered with default settings for the United States but our customers located outside of the U.S. will need to configure these settings accordingly.

The most common change made in mask maintenance is how the date displays. The Client Date Mask controls this display. When you first open the Mask Maintenance frame, select your default Language. Search the Mask ID column for the mask you wish to modify. Insert the new mask structure in the Custom column.

- ❗ Be careful modifying any mask structure that refers to Server settings or file extensions. Select SAVE to update the Mask records.

SAVE
UNDO
REFRESH
DELETE
FIND

Mask Maintenance

Warning - after mask values are changed you must logoff and on again to have the changes applied to your session.

Language: EN-US - English

Mask ID	Default	Custom	Last Changed	By
ClientDate	mm/dd/yyyy	dd/mm/yyyy	07/10/2020 13:01:36	U0005083
ClientDateMD	mon-dd		07/02/2017 11:07:10	U0005042
ClientDateMY	mon-yyyy		07/02/2017 11:07:29	U0005042
ClientDateTime	mm/dd/yyyy hh24:mi:ss	dd/mm/yyyy hh24:mi:ss	07/10/2020 13:01:36	U0005083
FileExtension	csv		09/12/2005 03:53:11	M5
FileExtension	doc		09/12/2005 03:53:11	M5
FileExtension	pdf		21/07/2006 10:19:58	CSI
FileExtension	rtf		09/12/2005 03:53:11	M5
FileExtension	txt		09/12/2005 03:53:11	M5
FileExtension	xls		09/12/2005 03:53:11	M5
Phone	(@@@)s@@@-@@@		08/02/2017 13:06:39	U0005006
SSN	***-**-****		09/04/2007 20:03:51	M5
ServerDate	mm/dd/yyyy		22/07/2019 10:20:13	M5
ServerDateTime	mm/dd/yyyy hh24:mi:ss		14/05/2019 10:50:05	M5
Zip	*****	****	13/10/2011 11:39:24	CSI

State/Country Codes

The State/Country Codes frame is a valid list of states within a specific country. The state codes are delivered with Canada, Mexico and the U.S. already loaded. Customers from other countries may want to review and add countries and state codes as needed.

Open the State/Country Codes frame and select the Country field to view the state names and abbreviations.

The screenshot shows a web interface for managing State/Country Codes. At the top, there are five buttons: SAVE (blue), UNDO (grey), REFRESH (blue), DELETE (grey), and FIND (grey). Below the buttons is the title "State Codes".

The main content area contains two tables:

- Country Codes (Loaded 10 records)**: A table with columns "Code", "Country", and "State Code Length". It contains three rows: 1 (USA, 3), 123 (NUMERIC, 2), and 2 (CANADA, 3). A fourth row (3, GREAT BRITAIN, 3) is partially visible at the bottom.
- Valid State Codes (Loaded 0 records)**: A table with columns "State Code" and "Description". It contains one row: PA (Pennsylvania).

1. To create a new country, select the blank row in the Country Codes table.
2. Enter the Code number, Country Name and State length.
3. To add a State for a country, select the Country code.
4. Scroll to the bottom of the Valid State Code list to add new state codes, as applicable.
5. Select SAVE.
6. To delete a State Code select the code, and then select DELETE. The row highlights in red. Select SAVE.
7. To delete a Country Code, select a Code, and then select DELETE. The row highlights in red. Select SAVE.

Time Interval

Units of time in M5 are calculated automatically and stored in the database tables as milliseconds. The Time Interval frame allows the user to change how it displays on a frame and on reports. This does not change the data in the tables.

Open the Time Interval frame. The columns which display are:

- Table Name
- Column Name
- Description
- Default Unit
- User Select Unit

Select the table and column name you want to customize from the list. Select the User Select Unit dropdown menu to select an interval. Select SAVE.

SAVE
UNDO
REFRESH
DELETE
FIND

Time Interval

Time (Loaded 49 records)

Table Name	Column Name	Description	Default Unit	User Select Unit
ACC_LAB_CHG	DURATION	Labor duration	Months	Months
ACC_LAB_CHG	TOTAL_TIME	Labor Entry Total Time	Hours	Hours
CALC_FIELD	DIFF_IN_OUT	Labor Entry Diff In Out	Hours	Minutes
CALC_FIELD	ELAPSED_TIME	Calculated Elapsed Time On CL	Hours	Hours
CATEGORY	DEPREC_TERM	Category Depreciation Term	Months	Months
CATEGORY	EXPECT_DT	Category Expected Life	Years	Years
CATEGORY	FINAN_TERM	Category Financing Term	Months	Months
CATEGORY	LEAD_TM	Category Lead Time	Months	Months
CURR_LABOR	FINCH_TIME	Labor Wedge Time on Job	Hours	Hours
LOC_GEN	MP_RESV_LATEHRS	Late Pickup Hours	Hours	Hours
LOC_GEN	RES_ADV_NOTICE	MP Reservation Advanced Notice	Days	Days
LOC_GEN	RES_DURATION	MP Reservation Duration	Days	Days
LOC_MAINT	ASSOC_PM_DURATN	Maintenance Location PM Due	Days	Days
MCC	MAXLABOR_DT	Maintenance Class Code	Hours	Hours
MCC_SCHED	TIME_INTER	MCC schedule interval	Days	Days
MPPOOL	ELAPSED_TIME	elapsed time on Motor Pool	Hours	Hours
MP_CLASS	PREP_DURATION	MP Prep Period	Days	Days

Time Zones

The time zone setting in M5 is always the time zone where your PC resides. The time zone field for locations on the Location Main frame still exist since there are reports that use that field.

Many reports include the date they were produced. Some reports display only dates while others display date and time. No matter how the date and time is shown we must decide if it should be adjusted to the user's time zone or if it should be the exact value in the database.

For example, if a user in PST runs an immediate report that another user in EST has generated, then the user will see the EST times on the report.

If a user in PST runs a scheduled report, then the time will be in the PST time zone. However, if a PST user views a report generated by a user in EST, then that report displays EST times.

If, however, a report that displays a shift (employee, unit, or location) then we do not compute the time zone difference but instead show the same date and time no matter where the user is viewing the report (eastern or pacific time zone).

Open the system Time Zones frame.

- The Time Zone where the database server is located should be set to 0 (zero).
- The other time zones are offset from the database server time zone in minutes. In the example above, the database server is located in the Eastern Time Zone. CST (Central), MST (Mountain), and PST (Pacific) are offset in -60 minute increments. AST (Atlantic) is offset by +60 minutes.
- To add a new zone and Code, select the blank row, enter the Code, and then enter the Offset minutes. Select SAVE.

Code	Description	Minutes Offset from Database Server
AST	Atlantic Time	240
CST	Central Time	120
EST	Eastern Time	180
HST	Hawaii Time	-180
MST	Mountain Time	60
PST	Pacific Time	0

System Translation Maintenance

The Translation Maintenance frame is used to change the field labels on frames and reports to your native language or simply to make it more useful for your organization to match terminology that is common to your environment.

Changing these default values changes the field label on the given frame. Please keep in mind that the M5 Support Group will not be aware of this new field label. You need to inform them of the new label so they will understand the details of the support issue you are discussing.

Open the Translation Maintenance frame, the Locale defaults to your Language. Double-click the Frame Name field if you are selecting by frame name. Select your frame from the list displayed.

If you choose to select by search criteria, one or all of the following can be used to perform the query.

- Domain is the M5 frame or report name.
- Default is the default label value.
- Translation is the new label value you enter.

If you want to change the Default field label on all the frames where it occurs leave Domain blank and enter the label name in the Default field. Select All and Retrieve. Enter the new default value and it will be changed on all the frames.

Show translation is useful if you are looking for labels that have been changed previously or if you want to see the ones that still have default values.

1. Enter the information to query. Select translation to show and select Retrieve.
2. The list of domains, defaults and translations display. The field names are not shown here, only the labels for them. So you must be familiar enough with the frames to recognize the correct label.
3. Select Edit to change the default setting. After the default has been changed, it becomes the translation.
4. Select SAVE.

Locale	Domain	Edit	Default / Translation
EN-US	Unit		Base LTD Usage
EN-US	Unit		Base LTD Usage
EN-US	Unit		input file (0) has transactions that have validation errors. Please see error file (1)
EN-US	batch		input file (0) processed successfully
EN-US	Unit		Login user = (0), ReportID = (1)
EN-US	Unit		Stop LTD Usage
EN-US	Unit		Stop LTD Usage

Interface and Screen Names

Interface and Screen Names are maintained by your M5 Support Group. The user is only allowed to modifying the display name and disable or activate the interface. The display name will appear in the Interface menu choices on the Interface Manager frame for any Interface that is not disabled. Templates are used by inbound Interfaces and can only be modified by the M5 Support Group.

Open Interface and Screen Names and select the interface name from the Display Name dropdown. You can locate the interface by scrolling the list of available names or using the search criteria section at the top to narrow your results. You can filter on Display Name, Template, and Disable (Y/N).



You must enter a Display Name first before you can filter by Template.

When that row is highlighted you can change the Display Name or disable the interface. When complete, select SAVE.

Interface Name	Display Name	Template	Disabled
			<input checked="" type="checkbox"/>
			<input checked="" type="checkbox"/>
			<input type="checkbox"/>
			<input type="checkbox"/>
			<input type="checkbox"/>
			<input type="checkbox"/>
			<input type="checkbox"/>
			<input checked="" type="checkbox"/>
			<input checked="" type="checkbox"/>

Interface Code Translation

This frame is used to configure data codes that are received through the various system interfaces. Normally M5 Support will assist in the creation of the Interface and the Interfaces Codes. The codes that are used by outside vendors must be translated into valid M5 codes before processing can occur. This is most commonly used with Fuel Interfaces but other choices are available: Products, Locations, Departments, Vendors, and Other. Use the Type dropdown menu to make the selections.

To add a new interface code, locate the correct interface and select the Interface code field and enter your new value. Select SAVE.

SAVE
UNDO
REFRESH
DELETE
FIND

Interface Code Translations

Item Selection

Type: Locations

Interface Codes (Loaded 246 records)			
Interface	M5 Values	Description	Interface Code
	NORMM	NORMANDY MAINTENANCE	0119
	MVTRAN	location for ANC work order	0120
	CONN	CONNELLSVILLE WEST SIDE	TEST SITE 1
	FM	FM Parking Location	FM
	FM	FM Parking Location	FGFGF
	DH1	Loc Desc	BRMLOC
	FM	FM Parking Location	605
	CNLOC1	WO Location 001 - pst	606
	FM	FM Parking Location	FM
	CNLOC1	WO Location 001 - pst	606
	FM	FM Parking Location	605
	CNFL01	Fuel Location 01	F1
	CNFL02	Fuel Location 02	F2
	FM	FM Parking Location	DOVER2
	FM	FM Parking Location	SIXFM1
	CNLOC1	WO Location 001 - pst	DOVER
	PMC	Pete test	PETE

Interface Manager

The Interface Manager frame allows the user to set up parameters for each interface and displays the current Execution Schedule for the interfaces. All currently active interfaces display on the dropdown list in the Interface field. After the interface is selected the parameters display. The parameters are different for each interface. Some may require a path for the input file or an email address for the output file. Some may only require a start and end date.

If you receive a new interface from a vendor make sure complete documentation is provided so M5 Support can assist you in configuring it properly.

Below the interface parameters is the Current Execution Schedule. This indicates if the interface is currently running or shows the last time it was run. The table shows the interface:

- ID
- Description
- Status
- Schedule Date
- Last Run
- Frequency
- If it Excludes Holidays and the Submitted By user
- Priority Run Desc.

If the status is complete, we recommended that the row be deleted. Select the row to delete, and then select DELETE. The row highlights in red. Select SAVE to complete the deletion.

You will configure your new Run Schedule within Schedule Details. The run interval has a dropdown option to select, Once, Minutes, Hours, Days, and Months. Select the option you want and enter the run interval to the left. Select the checkbox to exclude holidays and weekends to prevent it from running on those days. Enter the First execution date/time or select the Schedule/Reschedule button to default the current date and time.

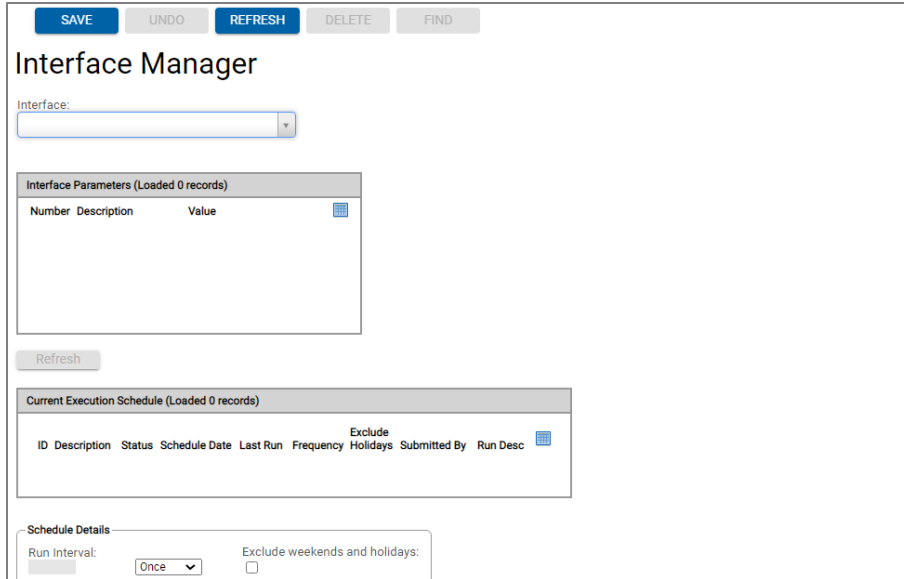
After selecting the Schedule/Reschedule button the data is automatically saved and submitted with the given parameters. The current execution schedule displays the information just submitted. Select the REFRESH button will refresh the frame showing the current execution's status. The interface is now submitted and depending on the setting of the Windows scheduler, the interface will run.

The back-end process that executes the interface programs consists of five different processes.

1. The Windows Scheduler. This is set up by the customer and dictates the interval by which the M5 Report Engine will be called.
2. On execution the M5 Report Engine checks to see if there are any new rows in the saves_reports table with the status other than error or complete.

3. If a new row is found the Command file is executed based on the parameters of the interface. The command file then passes the parameters onto an executable interface program.
4. The specific executable runs with the parameters received.
5. When the executable file processing is complete it generates an output log file. This file is made available to the customer as designated in the design specification documents.

To prevent an interface from being executed go to the Interface and Screen Names frame and disable it.



Repeat Repair Data Gen

The Repeat Repair Data Gen process gathers information on repeat repairs based on System Codes for the type of systems and the number of days between repairs. After this process is complete the system generates warnings of repetitive repairs and reports can be run to see this information.

Interface Reject Manager

Interface Reject Manager allows you to correct errors that have occurred in custom interfaces. It is provided if required as part of the Interface Specification document.

Interface Reject Manager

Interface:

Interface Statistics (Loaded 0 records)						
Stat ID	Run Date	Total Processed	Pass	Fail	Successful Reprocess	Elapsed Time In Hrs.

PM Notify

The PM Notify program sends emails that alert people when an upcoming preventative maintenance job is due. It works for other job types as well. The PM Notify program is launched using the Interface Manager frame. Open Interface Manager and select PM Notification System as the Interface.

The email sources may either be D for Using Department, L for Parking Location, or O for Operator. If the value is D the report displays units grouped by Using Department and it is sent to the Using Department email address. If the value is L the units will be grouped by Parking Location and it is sent to the Parking Location email address. If the value is O the report is sent to the Operator's email address, provided the operator has a valid setup in Employee Main. If not, the email will be sent to the Department email address.

Interface Manager

Interface:

Interface Parameters (Loaded 21 records)		
Number	Description	Value
1	JOB REASON CODE	P
2	NOTIFY DAYS	100
3	MAINT LOC START	DH1
4	MAINT LOC END	DH1
5	USING DEPT START	0010
6	USING DEPT END	RM10

Refresh

Current Execution Schedule (Loaded 1 records)							
ID	Description	Status	Schedule Date	Last Run	Frequency	Exclude Holidays	Submitted By
77873	M5-PMNOTIFY-INTF	Complete	06/11/2020 10:20:47	06/11/2020 10:21:31	Once	N	

Schedule Details

Run Interval: Exclude weekends and holidays:

Batch Process Manager

The M5 System has several internal batch processes that are critical to the overall integrity and functionality of the system. The configuring, scheduling and execution of these batch processes is controlled through the Batch Process Manager.

Different Batch Processes have different parameters to configure but maintaining and executing them is done through the same general steps.

Open the Batch Process Manager frame and select the Batch Process field to select a process. If there is a current schedule for that batch process, you will see a notice. It can be deleted or rescheduled as needed.

- To create a new schedule delete any current schedule then set up the new one.
- Each process has different parameters to be entered.
- Select the run interval.
- Select the Exclude weekends and holidays checkbox, if required.
- Select Schedule/Reschedule.

The screenshot displays the Batch Process Manager interface. At the top, there are buttons for SAVE, UNDO, REFRESH, DELETE, and FIND. Below these is the title 'Batch Process Manager' and a dropdown menu for 'Batch Process:' with 'ABC Class Assignments' selected. The main configuration area is titled 'Run ABC Class Assignments' and includes fields for 'Run Date:', 'Location:', and 'Update Class Codes:' (set to 'No'). Below this is the 'Schedule Details' section with a 'Run Interval:' dropdown set to 'Once' and an 'Exclude weekends and holidays:' checkbox. A 'Schedule / Reschedule' button is located below these options. A 'Refresh' button is also present. At the bottom, there is a table titled 'Current Execution Schedule (Loaded 0 records)' with columns: ID, Description, Status, Schedule Date, Last Run, Frequency, Exclude Holidays, Submitted By, and Run Desc.

Batch Processes

ABC Class Assignment

The ABC Class Assignment batch process produces a report that allows the user to preview how the ABC class codes will be assigned to stock parts. In the Batch Process Manager select ABC Class Assignment. Select the clock icon to select the day and time to run the batch.

Next you can enter a Location or select from the LOV or leave it blank for all locations.

Note: The default value for the Update Class Codes field is No.

This setting allows you to verify code assignments before updating them. You can make corrections and run this again as many times as you need to.

You can set the Run Interval and frequencies to run the batch, exclude holidays and weekends and Schedule or Reschedule. When you are satisfied with code assignments you can set the update value to Yes and run the batch to update the codes.

The value in this batch field ignores the setting in System flag 5038. System Flag 5038 only controls whether the update is performed during the End of Period batch process.

Allocation

The Allocation batch process is a customer specific process used for distributing costs to allocation pools or groups. The Allocation Pool is created by AssetWorks when requested by the customer and can be configured and executed through the Batch Process Manager.

Archiver

The Archiver batch process moves and stores older data that no longer needs to be readily available in active M5 tables. The program moves the data from various tables based on the type of transaction. M5 provides the ability to archive eight types of data transactions.

1. Fuel Transaction Detail
2. Indirect Account Detail
3. Parts Detail
4. Replacement Fund
5. Telematics
6. Unit Availability Detail
7. Unit Detail
8. Work Order Detail

Close Billing Period

The Close Billing Period batch process should be run after all billing transactions for the current period have been verified as accurate. When this batch is selected, the user is prompted to make sure they understand that when this process runs no further changes will be allowed in this period. After this batch process is executed the billing transactions are posted to the accounting ledgers and cannot be changed. Any adjustments will have to be made in the next billing period and both entries will appear in the audit trail.

- When you select the Close button the billing header displays the fiscal year and period for which billing will be closed.
- The Last Billing Run Date displays.
- Enter the Schedule Start Date For Billing Close. Selecting the field defaults to today's date and time.
- Select the run interval.
- Select Exclude weekends and holidays checkbox, if required.
- Select Schedule/Reschedule.
- Select SAVE.

End of Day


The End of Day batch process updates specific data into certain tables on a daily basis. By default this process automatically runs every day at the time specified unless it is changed. It produces an email when completed. The email is sent to the user specified in the Application User Maintenance frame.

The End of Day process performs the following tasks:

- Calculates unit downtime accumulated since the last End of Day was run.
- Updates part statistics with the last physical inventory date if no last physical inventory date is present.
- Updates Parts_Usage_Occ table to identify failures of major parts.
- Update Unit_Dept_Comp_Main with current values of Department numbers from Unit_Assign_Hist.

When you select the End of Day batch process you will see a notice if there is already a schedule active for it. Select OK to delete and reschedule to process.



1. Delete the existing schedule before creating a new one.
2. Enter the date and time to reschedule the end of day process.
3. Select the run interval.
4. Select the Exclude weekends and holidays checkbox, if required.
5. Select Schedule/Reschedule.
6. When the End of Day process has finished running, the user who ran it receives an email indicating that the process completed successfully or there were errors.
7. If there are any errors reported they can be corrected and the process can be run again.

 The End of Day batch process will not run during a system backup. So be sure to schedule it before or after your system backup runs. It is also recommended to run the End of Day process at a time when the system is in limited use.

End of Period

The End of Period batch process must be run no earlier than the first day of a new fiscal period. End of Period automatically closes the oldest currently open period. The tasks of the End of Period include:

- Verifying there is a unit history record for each unit for the current period.
- Propagating shift table information forward for the module flag designated amount of time.
- Running Eop_Inv_Proc, a process that performs inventory processing and cleanup by:
 - Rolling usage quantities by period and setting current period usage to zero.
 - Deleting transfers which have been rejected or completed over the number of days indicated by the Inventory Management module flag, Del. expired POs/Trans after (duration).
 - Rolling period start quantities/inventory dollar value by period.
- Getting current on-hand quantity and unit price to calculate the current period start quantity/inventory dollar value. The going price and Rav are calculated in the Part_Get_Price process according to the pricing method set for the Inventory Management system flag - Type of pricing to use for inventory valuation. These valid pricing methods include:
 - Location Standard: $\text{Locstd} - \text{Unit\$} = \text{Location Unit \$}$
 - Location Average: $\text{Locavg} - \text{Unit \$} = \text{Location Calculated Unit \$}$

- System Standard: Sysstd - Unit \$ = Part Unit \$
- System Average: Sysavg - Unit \$ = Part Calc Unit \$
- Incrementing the period roll counter (Pd_Roll_Ct) to annualize usage.
- Calculates depreciation for all units that have a depreciation type of S (Straight-line), and that do not have a SOLD status.
-  System flag 5290 – “Calculate depreciation based on capital journal?” determines how the depreciation of capitalized value is calculated. If set to N for purposes of depreciation, the capitalized value of the unit is the purchase cost plus capital adjustments at the time the end-of-period is run. This preserves existing functionality. If set to Y, the capitalized value of the unit only includes the changes made prior to the end of the period being closed, excluding those after the period was closed and before EOP was run. The Y setting also enables EOP to "catch up" and process depreciation for periods prior to the period being closed, including those values as a depreciation adjustment for the period being closed.
-  This flag cannot be changed by users because of the potential duplication of values if the flag is changed from N to Y. Only new customers or customers that have not otherwise implemented depreciation calculations in M5 should consider changing the flag.
- Updates the line items in the Budget frame (some applications do not have this frame) if the appropriate budget flags are set in System Flags.
- Updates Maintenance Class Code history.
- Sums past five years of unit history for reporting purposes (rolling five year window).
- Closes the period (nothing else can be charged to a closed period).
- Renames the user log file that keeps track of users.
- Updates the Last End of Period run.
- A batch process called Part_Hist can be run separately by setting System Flag 5032.

End of Period Process

1. Select End of Period in the Batch Process Manager. The fiscal year and period display.
2. Enter the date/time to start running the process. Today's date and time will default. Make adjustments if necessary.
3. Select the run interval.
4. Select the Exclude weekends and holidays checkbox, if required.
5. Select Schedule/Reschedule.

M5 sends an automatic email when the process has completed to the person who started the process. The email address comes from the Application User Maintenance frame. The email indicates if the process was completed successfully or had errors.

Forecaster

The Forecaster batch process predicts when a standard job is due for a unit, department, or component. The Forecaster uses the Standard Job MCC and the Standard Job Tech Spec to create work requests with a future due date. This date is calculated based on a time interval, the primary or secondary meter usage and/or fuel consumption. The set up of the Standard Job MCC and interval must be done prior to running the forecaster in order to have work requests generated. If the MCC setting is left at the default of zero the Forecaster will not calculate usage at all. The job may be set as recurring or one time only.

In the Batch Process Manager select Forecaster from the list of Batch Processes, the Run Date field displays. Press Tab to select the current date and move to the email notification field. The email notification will let the user know if the process ran successfully or failed. The default schedule interval is once. Select Schedule to execute.

The Forecaster is a powerful tool for ensuring that your units remain in compliance with warranties and in optimal working condition. Refer to the *Forecaster Application User Guide* for further details on using this tool to its fullest extent.

Part History

The Part History batch process allows the user to close the Part History on exactly the last day of the month separate from the End of Period Process. System Flag 5032 must be set for this to occur. Refer to the End of Period process for more details. To run it, select Part History in the Batch Process Manager. The Fiscal Year and Period display.

1. Enter the Date/Time to Start Run.
2. Select the run interval.
3. Select the Exclude weekends and holidays checkbox, if required.
4. Select Schedule/Reschedule.

Parts Requisitions

The Parts Requisition batch process automatically creates requisitions, requisitions and purchase orders, or part transfers within the parts inventory module. When reordering is done manually the quantities are based on the Standard Order Quantities from the Part Inventory Location Manager frame.

When reordering is scheduled automatically the quantities are based on the Economic Order Quantities established by the ABC classification and historical transactions. When you select Parts Requisitions in the Batch Process Manager, the Run Date field displays with today's date selected. Modify the date if desired or press Tab to select what you want to generate with this run.

1. Select requisitions only, requisitions and purchase orders or transfers only from the Generate dropdown.
2. Enter the Location in the Location field or a range of locations in the To Location Range field. A Vendor can be specified in the Vendor field.
3. Select the run interval and the Exclude weekends and holidays checkbox, if required.
4. Select Schedule/Reschedule.

Planned Absence

The Planned Absence batch process updates employee holidays and vacation schedules. These appear on the Labor Time Card frame. It must be run on a daily basis.

After the process is scheduled it automatically runs every day. Use the Holiday Calendar frame to set up the Company holidays to automatically appear as part of the Employee Absence. This frame sample has a schedule set up to run daily.

1. To create a Planned Absence batch process, enter the Date/Time to Start Run.
2. Select the Run Interval.
3. Select the Exclude weekends and holidays checkbox, if required.
4. Select Schedule/Reschedule.

As part of your regular maintenance you can delete one time jobs that are not set to recur. Refer to the System Run List of Jobs frame to complete this maintenance.

Repeat Work

Used in conjunction with enhanced repeat repairs functionality and System Flag 5212.

Run Billing Period

The Run Billing Period batch process produces a detailed report showing all the items in the current billing period. It is not directly connected to the End of Period process. It can be run anytime you would like to examine the details of the items in the current billing period. The Current Billing Period is based on the last time you closed a Billing Period by running the Close Billing Period batch process. The report produced by Run Billing Period gives you the opportunity to find any mistakes in billing transactions before posting them to the current billing period ledgers.

The Run Billing Period process populates data into specific tables based on the configuration of the billing structure in the M5 System. After the Run Billing Period process is finished the reports should be carefully reviewed to make sure the data is correct. If not, corrections can be made and the Run Billing Period batch can be executed again as often as needed. After the data is verified the billing can be finalized by running the Close Billing Period process. After the Close Billing Period process is complete no additional changes can be made to the current period. Any changes discovered after this have to be corrected as adjustments in the new period and both items, the incorrect original charge and the corrected charge will appear in the audit trail.

1. Select Run Billing Period from the list of batch processes.
2. The Billing Header displays the current fiscal year and the fiscal period for the billing transactions that will be shown on the reports.
3. The Run Type setting is determined by the previous history of this batch. This example shows Re-Run Billing as the type because it was already executed in the current Billing Period. The last Billing Run information is shown here.
4. If the billing period has not already been closed you can set up the details discussed in the next steps. Most importantly, the Run Type includes Run Billing in addition to Re-Run Billing.
5. Enter the Date/Time to Start Billing. Selecting the field defaults to today's date and time.
6. Select the Process Open Work Orders? checkbox if you want the billing to include charges on open work orders.
7. Daily Run Parameters allows billing to be configured to run on a daily basis. You can choose to mark the transactions as billed and control the end date of run.
8. Select the Run Interval.
9. Select the Exclude weekends and holidays checkbox, if required.
10. Select Schedule/Reschedule.

Unit/Component Record Purge

This batch process allows for the purge of disposed of (sold) assets after a determined amount of time has passed since the date of sale. The process selects and then permanently deletes asset records based on the defined batch process parameters when the user schedules the program.

Physical Inventory Create Count

Physical Inventory Create Count generator frame is used to create your count sheets and select the parts to be counted for your inventory. On the General tab select the method you are going use and configure the schedule details on the Schedule Info tab. Select the Schedule/Reschedule button to run it as configured. Select SAVE.

The screenshot shows the 'Physical Inventory Create Count' application window. At the top, there is a toolbar with buttons for 'SAVE', 'UNDO', 'REFRESH', 'DELETE', 'FIND', and 'RELATED' with a dropdown arrow. Below the toolbar, the title 'Physical Inventory Create Count' is displayed. Underneath, there is a section for 'Physical Inventory Information' containing a 'Location' field with 'FM' and 'FM Parking Location' as options, and a 'Phy Inv ID' field with a 'New Phys Inv ID' button. At the bottom, there are two tabs: 'General' (selected) and 'Schedule Info'.

System Run List of Jobs

The System Run List of Jobs frame displays all batch processes, the status, run date, and who submitted them. This frame can be used to determine what scheduled processes are set up to run and what is currently running.

Scheduled reports or reports still running can be deleted from here by highlighting the row and selecting the DELETE button. The row highlights red. Select SAVE to update the deletion.

The screenshot shows the 'System Run List of Jobs' application window. At the top, there is a title 'System Run List of Jobs' and a 'Status' dropdown menu set to 'Initiated'. Below the title, there is a header 'List of Jobs (Loaded 0 records)'. The main area contains a table with the following columns: 'Delete' (with a checkbox), 'ID Description', 'Status', 'Schedule Date', 'Last Run', 'Frequency', 'Exclude Holidays', 'Submitted By', and 'Priority Run Desc'.

Delete <input type="checkbox"/>	ID Description	Status	Schedule Date	Last Run	Frequency	Exclude Holidays	Submitted By	Priority Run Desc
List of Jobs (Loaded 0 records)								

Notification Manager

The Notification Manager frame functionality sends emails (notifications) to certain users when specific events take place within the system. These events can be reviewed using the Notification History Query frame.

There are several notifications that exist where special set up is required in order to use the event notification. These notifications require special items to be created and the value of these items can determine who the notification is sent to.

A notification event can be disabled so that it will not be used.

Notification Manager Set Up

The screenshot displays the 'Notification Manager Set Up' interface. At the top, there are buttons for 'SAVE', 'UNDO', 'REFRESH', 'DELETE', 'FIND', and 'RELATED'. Below these is the 'Notification Manager' title and a 'Notification Information' section with 'From Domain: Assetworks.com'. The main area contains two event configuration panels.

Event Information (ACCIDENT - FATALITIES)

- Subject:** Notification of Accident Fatalities ***ASSETWORKS TEST MESSAGE***
- Message:** On :DT Accident Number :AN Unit Number :U was entered and contained :NK or more fatalities.
- Available:** Crash Officer Notify 2, 3, 4, 5
- Assigned:** Crash Officer Notify 1
- Message Variables:** :AN = Accident No, :DT = Date/Time, :NK = Number Killed, :U = Unit No
- Disabled:** No

Event Information (ACCIDENT - INJURIES)

- Subject:** Notification of Accident Injuries ***ASSETWORKS TEST MESSAGE***
- Message:** On :DT Accident Number :AN Unit Number :U was entered and contained :NI or more injuries.
- Available:** Crash Officer Notify 2, 3, 4, 5
- Assigned:** Crash Officer Notify 1
- Message Variables:** :AN = Accident No, :DT = Date/Time, :NI = Number Injured, :U = Unit No
- Disabled:** No

Available Notifications

The Notification Manager frame allows the user to enable or disable any of the notification events. The user cannot create their own notification, however, they can edit any of the notification Subject lines or Message content provided that are not disabled.

The variable used in the Subject line and Message will show the exact value for which the event occurred. For example, :U means the exact unit number will be shown in the email message.

Multiple emails can be sent to different people for certain notification events. For example, an email message can be sent for when a unit is sold. The message can be sent to both the owning department contact of the unit as well as the maintenance location contact.

Note: When you select the **Exclude from Unit Notifications** checkbox on *Category Main*, a notification is not sent for the category code.

Available Notifications list

Available Notification	Description
Accident Entry	When an accident is created, up to three people can be notified.
Acquire Unit	When an acquisition date is entered into Unit Main, one person can be notified.
Acquire Unit Fuel Card	When a fuel card is entered for a unit, one person can be notified. Two items are required.
Activate Unit	When a unit is put into service and has a replacement unit, one person is notified.
Activate Unit Commuter	When a unit is put into service, one person is notified.
Appointment Request Approved	Generated when a Maintenance Appointment Request is approved.
Appointment Request Cancelled	Generated when a Maintenance Appointment Request is cancelled.
Appointment Request Denied	Generated when a Maintenance Appointment Request is denied.
Appointment Request Made	Generated when a Maintenance Appointment Request is created.
Appointment Request Rescheduled	Generated when a Maintenance Appointment Request is created.
Budget Unit	When a unit is budget status, one person is notified.
Class Changed	When any of the five user classes is changed.
Decommission Unit	When a decommissioned designated job is on a WO, one person can be notified.
Disp Unit – Close Card	When a unit is flagged, one person is notified to review the fuel card. One item is required.
Driver Event Approaching Expiry	Generated when a created driver event is approaching the expiry date.
Driver Event Expired	Generated when a created driver event expires.
Equipment Checked Out	Generated when an Equipment Request record is fulfilled (checked out).

Equipment Request Created	Generated when an Equipment Request record is created.
Fees	Generated when a fee charge or violation has been entered for the employee on the received date.
ICU Health Check	When an ICU reports a health check, up to one person can be notified.
ICU Low Battery	When a hose has a low battery condition, up to one person can be notified.
ICU Pulser Failure	If a has a pulser failure and up to three fuelings did not occur, up to one person can be notified.
ICU EM Status	Generated to provide updates on an ICU status change out of emergency mode.
Incident Created	Generated when an incident is created.
Investigation Assigned	Generated when a road failure investigation is assigned to a unit.
Invoice Correction Required	Generated when an invoice requires correction.
Invoice Rejected	Generated when an invoice is rejected.
Issue Request Rejected	When a part issue request is rejected, up to two people can be notified.
Keyvalet Controller Offline	Generated when the controller goes offline.
Keyvalet Failed Return	When a motor pool ticket cannot be completed by key valet, one person is notified.
Keyvalet Vehicle Keys Not Returned	Generated when the keys are not detected in the key box, either because they were not returned or returned improperly.
Motor Pool Cancelled	If a motor pool ticket is cancelled, up to two people can be notified.
Motor Pool Created	When a motor pool ticket is opened, up to two people can be notified.
Motor Pool Reservation Completed	When a motor pool ticket is completed, up to two people can be notified.
Motor Pool Unit Assigned	When a vehicle is assigned to a motor pool ticket, up to two people can be notified. See System Flag 5513.
Motor Pool Unit Updated	If the Unit number that was assigned has been changed, up to two people can be notified.
Motor Pool Ticket Past Due	Generated when a motor pool ticket is past the return date or time.

Order Unit	When a unit is ordered status, one person can be notified.
Order Unit Fuel Card	When a new fuel card is assigned to a unit, one person can be notified.
Parking Loc Changed	When a parking location is changed for a unit, up to one person can be notified.
Part Request Created	Generated when a part request has been requested.
Part Request Ready	Generated when the part request is moved to a READY status.
Part Requisition Approved/Rejected	When a part requisition is approved or rejected, up to two people can be notified.
Part Requisition on Order	When a part requisition is added to a PO, up to one person can be notified.
Part Requisition Rejected	When a part requisition is rejected only, up to two people can be notified.
Part Transfer Request Created	Generated when a new part transfer request is created.
Reading out of Range	If a telematics reading is out of range, one person can be notified.
Request Approval Needed	If a unit request is awaiting approval, one person can be notified.
Request Rejected	If a unit request is rejected, up to three people can be notified.
Sell Unit	If a unit is sold, up to seven people can be notified.
Sensor Alarm	Generated for the location receiving the sensor alarm through Veeder Root into FleetFocus.
System Alarm	Generated for the location receiving the system alarm through Veeder Root into FleetFocus..
Tank Alarm	When a tank has set off an alarm based on an event, up to one person can be notified.
Time Sheet Entry Rejected	Generated when a time sheet entry is invalid.
Unit Availability Status Change	When unit availability of an unit has changed, up to four people can be notified.
Unit Delivered	When an arrival date is assigned to a unit, one person can be notified.
Work Order Cancelled	Generated when a work order is cancelled.
Work Order Completed	Generated when a work order is completed.
Work Order Due Date Changed	Generated when a change to the due date is detected.

Work Order Opened	Generated when a work order is opened.
WR Created from Test Failure	Generated when a completed test suite creates work requests as a result of failed tests.

See Notification Variables, Qualifications, and Recipients for a complete listing of notifications and where the emails are retrieved from within the application.

Notification Break Down

Notification field	Description
Subject	Subject line of the email generated. You can edit this field.
Message	Body of the email generated. You can edit this field.
Available	List of entities that can be notified.
Assigned	List of entities that will be notified.
Disabled	<p>Yes – Disable a notification.</p> <p>No – Enable a notification.</p> <p>Location –System Flag 5496 is set to Y. Additional configuration is required on the Notifications tab of the Location Main frame.</p>
Message Variables	<p>List of variables that can appear in the message.</p> <p>Note: Variables are replaced with the actual values when the notification is generated.</p>

Disable or Enable a Notification

From the **Disabled** dropdown of a specific notification:

- Select **Yes** to disable a notification.
- Select **No** to enable a notification.
- Select **Location** for a location specific notification.

The screenshot shows the Notification Manager interface with two notification entries. The top entry is for 'ACCIDENT - FATALITIES' and the bottom for 'ACCIDENT - INJURIES'. Both have a 'Disabled:' dropdown menu. In the first entry, 'No' is selected. In the second entry, 'No' is also selected.

Location Option

The screenshot shows the Notification Manager interface with two notification entries. The top entry is for 'ACCIDENT - FATALITIES' and the bottom for 'ACCIDENT - INJURIES'. Both have a 'Disabled:' dropdown menu. In the first entry, 'Location' is selected. In the second entry, 'No' is selected.

Location Main

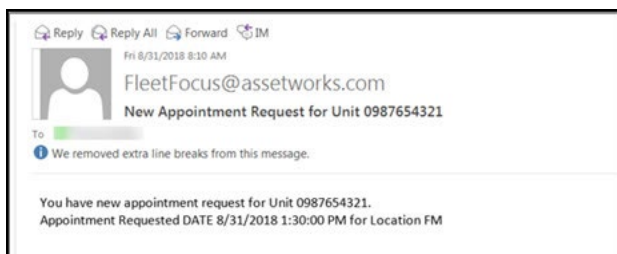
Edit Subject or Message

You can edit the notification Subject or Message when the notification is not disabled. If Disabled is Yes, the notification information is read-only.

When the system sends the email, the real data pertaining to that event will replace the variable. For example, the :U variable means the message will display the real unit number in the email message.

After making any changes, select **SAVE**.

Email Notification Example



Add Attachments

You can add additional documentation to be included with the notification email in the form of attachments.

To add attachments to a specific notification:

1. Make sure the notification is enabled.
2. Select Attach.
3. In the Show Attachments window, use the links at the bottom to add the necessary attachments.
4. When finished, select OK to return to the Notification Manager frame.

The screenshot shows the 'Notification Manager' window with several tabs and sections. The 'Event Information (ACCIDENT - FATALITIES)' section is active. In this section, the 'Subject' field contains 'Notification of Accident Fatalities ***ASSETWORKS TEST MESSAGE***'. The 'Message' field contains a test message. To the right of the message field, there is an 'Attach' button highlighted with a red box. Next to it is a 'Disabled:' dropdown menu set to 'No'. Below the message field, there are two columns: 'Available' and 'Assigned', each with a list of 'Crash Officer Notify' items and arrows for moving them between columns. To the right of these columns is a 'Message Variables' section with a list of variables like :AN = Accident No, :DT = Date/Time, etc. Below this section, there is another 'Event Information (ACCIDENT - INJURIES)' section, also with an 'Attach' button and a 'Disabled:' dropdown set to 'Yes'.

The screenshot shows the 'Show Attachments (not for menu)' dialog box. At the top, it says 'Attached to: Event: ACCIDENT - FATALITIES' and 'Key: ACCIDENT - FATALITIES~56 ()'. Below this is a table titled 'Existing Attachments (Loaded 0 records)' with columns for 'Command', 'Description', 'Type', 'Uploaded By', and 'Date Uploaded'. The table is currently empty. At the bottom of the dialog, there are three links: 'Attach a new file.', 'Attach a web address.', and 'Attach a previously uploaded file or web address.'. The first link, 'Attach a new file.', is highlighted with a red box. To the right of the links are 'OK' and 'Cancel' buttons.

Notification History Query

SAVE
UNDO
REFRESH
DELETE
FIND

Notification History Query

Selection Criteria

Event: Send To:

Date Range:

Notification Event History (Loaded 31 records)				
Event	Notify Date	Send To	Subject	Message
APPOINTMENT REQUEST MADE	04/21/2020 13:05:20		New Appointment Request for Unit 6225-4 ***ASSETWO	Message
APPOINTMENT REQUEST MADE	04/21/2020 13:01:40		New Appointment Request for Unit JW1 ***ASSETWORK	Message
APPOINTMENT REQUEST MADE	04/21/2020 12:55:11		New Appointment Request for Unit 6225-4 ***ASSETWO	Message
APPOINTMENT REQUEST MADE	04/21/2020 12:49:32		New Appointment Request for Unit JW1 ***ASSETWORK	Message
APPOINTMENT REQUEST MADE	04/21/2020 09:38:36		New Appointment Request for Unit JW1 ***ASSETWORK	Message
APPOINTMENT REQUEST MADE	04/21/2020 09:32:20		New Appointment Request for Unit 6225-4 ***ASSETWO	Message
APPOINTMENT REQUEST MADE	04/21/2020 09:26:22		New Appointment Request for Unit 6225-4 ***ASSETWO	Message
APPOINTMENT REQUEST MADE	04/06/2020 14:16:25		New Appointment Request for Unit JW1 ***ASSETWORK	Message
APPOINTMENT REQUEST MADE	04/03/2020 17:44:03		New Appointment Request for Unit JW1 ***ASSETWORK	Message
APPOINTMENT REQUEST MADE	04/03/2020 17:25:46		New Appointment Request for Unit JAMIEI ***ASSETW	Message
APPOINTMENT REQUEST MADE	02/26/2020 13:20:52		New Appointment Request for Unit MAINTAPPTQA1 ***	Message

Notification events that have occurred can be viewed using the Notification History Query frame. The Notification History Query displays each notification event that has been sent including the Event name, Notify Date, Send To email address, message Subject, and the Message link to view the message. You can filter the information by Event, Send To, and Date Range.

To generate the Notification Event History query:

1. Enter the Event name or double-click in the Event field to select from the Notification Event list.
2. Optionally, enter an email address in the Send To field.
3. Narrow your results by entering a Date Range.
4. Select Retrieve to display the results matching your criteria.
5. To view the contents of a specific notification, select the Message link.
6. To generate a new query, select Clear and then enter new criteria.

SAVE
UNDO
REFRESH
DELETE
FIND

Notification History Message Information

Notification APPOINTMENT REQUEST MADE Message Information

Subject
New Appointment Request for Unit JW1 ***ASSETWORKS TEST MESSAGE***

Message
You have new appointment request for Unit JW1.
Appointment Requested DATE 4/24/2020 5:00:00 PM
for Location NORMM

ASSETWORKS TEST MESSAGE

Notification Variables, Qualifications, and Recipients

Event	Message Variables	Qualification Variables	Email Address field	Special Qualifier
ACCIDENT – FATALITIES	AN = Accident No. DT = Date/Time NK = Number killed U = Unit No.	Crash Officer 1 through 6	Email address associated with corresponding Accident Item from Item Master Definition.	System Flag 5476
ACCIDENT – INJURIES	AN = Accident No. DT = Date/Time NI = Number injured U = Unit No	Crash Officer 1 through 6	Email address associated with corresponding Accident Item from Item Master Definition.	System Flag 5475
ACCIDENT ENTRY	AN = Accident No. DT = Date/Time U = Unit No.	Supervisor of Operator, Administration and owning dept of unit	Employee Main email of supervisor of operator; accident item value = DCAS ACCIDENT EMAIL; department item value = CARS PREVENTION EMAIL.	
ACQUIRE UNIT	A = Arrival Date U = Unit No. RU = Replaces Unit ML = Maint Location	Maint Loc of Unit Using Dept of Unit Owner Dept of Unit	Location Main email address.	

ACQUIRE UNIT FUEL CARD	C = Card No. U = Unit No. O = Order Date PL = Parking Location	Park Loc of Unit	Location item value where item = FUEL CARD ADMINISTRATOR.	Unit item value = Y where item = 'FUEL CARD REQ'D.
ACTIVATE UNIT	N = Effective Date RU = Replaces Unit U = Unit No.	Maint Loc of Unit	Location Main email address.	
ACTIVATE UNIT COMMUTER	N = Effective Date U = Unit No.	Park Loc Unit Act	Location Main email address of parking loc.	Activity code = COMMUTING
APPOINTMENT REQUEST APPROVED	AD = Appointment Date L = Location U = Unit Number	Maint Loc of Unit Park Loc of Unit Using Dept of Unit Owner Dept of Unit Vehicle Operator	Location Main email Department email Employee email	
APPOINTMENT REQUEST CANCELLED	AD = Appointment Date L = Location U = Unit Number	Maint Loc of Unit Park Loc of Unit Using Dept of Unit Owner Dept of Unit Vehicle Operator	Location Main email Department email Employee email	
APPOINTMENT REQUEST DENIED	AD = Appointment Date L = Location U = Unit Number	Maint Loc of Unit Park Loc of Unit Using Dept of Unit Owner Dept of Unit Vehicle Operator APPT Contact	Location Main email Department email Employee email	
APPOINTMENT REQUEST MADE	AD = Appointment Date L = Location U = Unit Number	Maint Loc of Unit Park Loc of Unit Using Dept of Unit Owner Dept of Unit Vehicle Operator APPT Contact	Location Main email Department email Employee email	

APPOINTMENT REQUEST RESCHEDULED	AD = Appointment Date L = Location U = Unit Number	Maint Loc of Unit Park Loc of Unit Using Dept of Unit Owner Dept of Unit Vehicle Operator APPT Contact	Location Main email Department email Employee Email	
BUDGET UNIT	B = Budget Date PL = Parking Loc U = Unit No.	Park Loc of Unit	Location Main email address.	
CLASS CHANGED	N = Effective Date NV = New Value OV = Old Value U = Unit No.	Class1 of Unit Class2 of Unit Class3 of Unit Class4 of Unit Class5 of Unit	Department Main email address of owning dept of unit.	If you only want notification when class 2 is changed, for example, then you select Class2 of Unit.
COMMERCIAL REQUEST FOR SERVICE REQUIRES APPROVAL	E = Emp No EN = Emp Name ML = Maint Loc W = WO No	Employee Supervisor, Location Item Service Request, Maintenance Location	Employee's Supervisor Email from Employee Main, Email address associated with the Location Item SERVICE REQUEST, and Location Main email.	
DECOMMISSION UNIT	J = Job code W = Wo No. N = Effective Date U = Unit No X = WO Comp Date	Park Loc of Unit Lease Admin	Location item value where item = LEASE ADMINISTRATOR.	
DISP UNIT - CLOSE CARD	U = Unit No. D = Disposal Date C = Card No.	Owner Dept of Vehicle Dept Item Bank	Department Item value where item = BANK EMAIL.	DISP UNIT - CLOSE CARD

DRIVER EVENT APPROACHING EXPIRY	C = Pre-expiry notification D = Driver Number DN = Driver Name ED = Expiry Date NF = Notification T = Driver Event Type TD = Driver Event Type Date	Driver Department Driver Employee Supervisor Training Coordinator	Department Email Driver Email Employee's Supervisor's Email Email for Department Item TRAINING COORDINATOR that corresponds to employee/driver's department on Employee/Driver Main.	
DRIVER EVENT EXPIRED	C = Pre-expiry notification D = Driver Number DN = Driver Name ED = Expiry Date NF = Notification T = Driver Event Type TD = Driver Event Type Date	Driver Department Driver Employee Supervisor Training Coordinator Email	Department Email Driver Email Employee's Supervisor's Email Email for Department Item TRAINING COORDINATOR that corresponds to employee/driver's department on Employee/Driver Main	
DRIVER EVENT HIGH RISK	D = Driver Number DN = Driver Name DT = Date/Time E = Emp No. T = Driver Event Type	Driver Driver Department Employee Supervisor Training Coordinator Email	Driver Email Employee's Supervisor's Email Email for Department Item TRAINING COORDINATOR that corresponds to employee/driver's department on Employee/Driver Main	
EQUIPMENT CHECK OUT	E = Emp No EN = Emp Name U = Unit No UD = Unit Desc L = Location LD = Location Desc	Employee Supervisor(s) Location Requesting Employee	Requesting Employee Employee Supervisor Email Address Location	
EQUIPMENT REQUEST CREATED	E = Emp No EN = Emp Name EQ = Equip Type	Employee Supervisor(s) Location	Requesting Employee Employee Supervisor Email Address Location	

	<p>EQD = Equip Type Desc SK = SKU SKD = SKU Desc L = Location LD = Location Desc</p>	<p>Requesting Employee</p>		
FEES	<p>E = Emp No FC = Fee Code FI = Fee Chg ID FS = Sub-Code IA = Issuing Authority LL = Login Loc RD = Received Date U = Unit No VD = Violation Date</p>	<p>Fee Contact Email Fee Department Email Fee Employee Email Fee Unit Operator Email Login Location Email Using Dept of Unit</p>		<p>Facilitates the delivery of standard documents to recipients associated with the Fee entry.</p>
ICU HEALTH CHECK	<p>DT = Date/Time ED = ICU Event Data IC = ICU No IE = ICU Event L = Location</p>	<p>ICU Event</p>	<p>Email set up for event on PRODUCT SETUP FUEL ISLAND.</p>	<p>FuelFocus</p>
ICU LOW BATTERY	<p>H = Hose IC = ICU No. IE = ICU Event L = Location N = Effective Date</p>	<p>ICU Event</p>	<p>Email set up for event on PRODUCT SETUP FUEL ISLAND.</p>	<p>FuelFocus</p>
ICU PULSER FAILURE	<p>H = Hose IC = ICU No. IE = ICU Event L = Location N = Effective Date</p>	<p>ICU Event</p>	<p>Email set up for event on PRODUCT SETUP FUEL ISLAND.</p>	<p>FuelFocus</p>
ISSUE REQUEST REJECTED	<p>EN = Emp Name IR = Issue Request No. P = Part No. PE = Part Description</p>	<p>Reserve Ref No. Request Emp</p>	<p>Department Main email address. Employee Main email address of requestor.</p>	<p>Reserve Ref No. notification is only for a rejected part request for a department.</p>

KEY VALET FAILED RETURN	MP = MP Ticket	Motor Pool Location	Location Main email address of MP location.	Key Valet
MOTOR POOL CANCELLED	MP = MP Ticket U = Unit No.	Motor Pool Location Request Emp/Dr No	Location Main email address of MP location; Employee Main email address of requestor.	
MOTOR POOL CREATED	EN = Emp Name MD = Msg Detail	Motor Pool Location Request Emp/Dr No	Location Main email address of MP location; Employee Main email address of requestor.	
MOTOR POOL RESERVATION COMPLETED	EN = Emp Name MD = Msg Detail MP = MP Ticket	Motor Pool Location Request Emp/Dr No	Location Main email address of MP location; Employee Main email address of requestor.	
MOTOR POOL UNIT ASSIGNED	EN = Emp Name MD = msg Detail MP = MP Ticket	Motor Pool Location Request Emp/Dr No	Location Main email address of MP location; Employee Main email address of requestor.	
MOTOR POOL UNIT UPDATED	MP = MP Ticket NV = New Val OV = Old Val PD = Pickup Date	Motor Pool Location Request Emp/Dr No	Location Main email address of MP location; Employee Main email address of requestor.	
ORDER UNIT	U = Unit No. O = Order Date PL =Parking Location	Park Loc of Unit	Location Main email address.	
ORDER UNIT FUEL CARD	C = Card No. U = Unit No. O = Order Date PL = Parking Location	Unit Fuel Card Admin	Location Item Value where item = FUEL CARD ADMINISTRATOR.	And Unit item value = Y where item = 'FUEL CARD REQ'D (Y/N).
PARKING LOC CHANGE	N = Effective Date NV = New Value OV = Old Value U = Unit No.	Park Loc of Unit	Location Main email address for old value and new value.	
PART REQUEST CREATED	E= Emp No EN = Emp Name IL = Inv Loc	Inv Loc Restock Employee Supervisor Email	Location Main email address	

	P = Part No PE = Part Description W = WO No	Location Item PART REQ CREATED		
PART REQUEST READY	E= Emp No EN = Emp Name IL = Inv Loc P = Part No PE = Part Description W = WO No	Inv Loc Restock Employee Supervisor Email Location Item PART REQ CREATED	Location Main email address	
PART REQUISITION APPROVED/ REJECTED	AL = Approve List L = Location RL = Reject List RN = Part Req No.	Inv Loc Restock Part Req Approved	Location Main, email restock messages to email; Application User email address of person generated part requisition.	
PART REQUISITION ON ORDER	AL = Approve List L = Location PO = PO Number	Inv Loc Restock	Location Main, email restock messages to email.	
PART REQUISITION REJECTED	L = Location RL = Reject List RN = Part Req No UN = Requestor	Inv Loc Restock Part Req Approved	Location Main, email restock messages to email; Application User email address of person generated part requisition.	
PART TRANSFER REQUEST CREATED	E = Emp No. EN = Emp Name ILF – Inventory Location (from) ILT = Inventory Location (To) P = Part No PE = Part Description	Employee Supervisor(s) Inv Loc Restock (From) Inv Loc Restock (To)	Inv Loc Restock (From) Inv Loc Restock (To) Employee Supervisor Email Location Main email	
READING OUT OF RANGE	ML = Maint Loc U = Unit No.	Maint Loc of Unit	Location Main email address of Maint Loc.	Telematics
REQUEST APPROVAL NEEDED	UR = Unit Request No. U = Unit No.	Unit Req Approval	Employee Main email address where the application user employee number field matches and database user as Tier 2 privilege.	

REQUEST REJECTED	UR = Unit Request No. U = Unit No.	Request Emp Requestor Unit Req Approval	Employee Main email address where the application user employee number field matches the unit request record.	
SELL UNIT	S = Sell Date U = Unit No.	Maint Loc of Unit Park Loc of Unit Location Item County Owner Dept of Unit Dept Item Acct. Dept Item Fit. Mgr Location Item DMV	Location Main email address. Location item value where item in DMV Email, County email. Dept item value where items = Fleet Manager, Accounting Contact.	
SENSOR ALARM	ED = ICU Event Data IC = ICU No IE = ICU Event L = Location N = Eff Dt SS = Sensor	ICU Event	Email set up for event on Product Setup Fuel Island	
SYSTEM ALARM	ED = ICU Event Data IC = ICU No IE = ICU Event L = Location N = Eff Dt	ICU Event	Email set up for event on Product Setup Fuel Island	
TANK ALARM	ED = ICU Event Date IC = ICU No. IE = ICU Event L = Location N = Effective Date T = Tank	ICU Event	Email set up for event on PRODUCT SETUP FUEL ISLAND.	
UNIT AVAILABILITY STATUS CHANGE	CM = Comment N = Effective Date SD = Status Desc	Operator Supervisor Unit Avail Notify	Email from EMPLOYEE MAIN.	Employee must be designated as an operator.

	ST = Status	Vehicle Operator Vehicle Parking Location		
UNIT DELIVERED	U = Unit No. A = Arrival Date PL = Parking Location ML = Maint Location	Maint Loc of Unit	Location Main email address.	
WORK ORDER CANCELLED	DT = Date/Time L = Location U = Unit No W = WO No	Unit Item High Priority Unit Using Dept (WO) Vehicle Operator (WO)	Email address assigned to the Unit Item HIGH PRIORITY EMAIL. Work Order Using Department Email. Email of Employee Assigned as Operator of the Unit on the Work Order.	Send WO Notifications box must be checked on Location Main Maintenance tab.
WORK ORDER COMPLETED	DT = Date/Time L = Location MA = Maint APPT ID U = Unit No W = WO No	Appointment Contact Unit Item High Priority Unit Using Dept (WO) Vehicle Operator (WO)	Email for the Appointment Contact on the Maintenance Request Appointment. Email address assigned to the Unit Item HIGH PRIORITY EMAIL. Work Order Using Department Email. Email of Employee Assigned as Operator of the Unit on the Work Order.	Send WO Notifications box must be checked on Location Main Maintenance tab.
WORK ORDER DUE DATE CHANGED	CR = Change Code Reason Description	Location Controller Owning Department Using Department Vehicle Operator	Email addressed assigned to Location Item LOCATION CONTROLLER. Owning Department Email assigned to Unit on Work Order. Using Department Email assigned to Unit on Work Order. Email of Employee Assigned as Operator of the Unit on the Work Order.	

<p>WORK ORDER OPENED</p>	<p>DT = Date/Time L = Location U = Unit No W = WO No</p>	<p>Unit Item High Priority Unit Using Dept (WO) Vehicle Operator (WO)</p>	<p>Email address assigned to the Unit Item HIGH PRIORITY EMAIL. Work Order Using Department Email. Email of Employee Assigned as Operator of the Unit on the Work Order.</p>	<p>Send WO Notifications box must be checked on Location Main Maintenance tab.</p>
<p>WR CREATED FROM TEST FAILURE</p>	<p>DT = Date/Time L = location T = Test Suite Description U = Unit No. WR = Work Request</p>	<p>Maint. Loc of Unit Owner Dept of Unit Using Dept of Unit Vehicle Operator</p>	<p>Location Main email address Department Main email address Department Main email address Employee Main email address</p>	

Email Group

The Email Group frame allows you to manage email groups and assign email addresses to those groups. The Email Group functionality applies to each Email, Email Notification, and Email Address field in M5.

System Flag 5249 controls when to use only validated email addresses and email groups.

When the System Flag is set to Y, only email addresses created in the Email Address Maintenance frame or an Email Group can be used. If not, any email address or email group can be entered within the application, but Email Groups will not function.



When System Flag 5410 is set to Y, if the value entered is an email address (without the domain) and it corresponds to an email group, the email group and not the singular email address is used.



If you are using LDAP authentication with System Flag 5249 set to Y, this prevents you from logging on to the system if your email address has not been entered in the Email Address Maintenance frame.

Email Group

Email Group

Name:

Email Addresses

Assigned Email Addresses

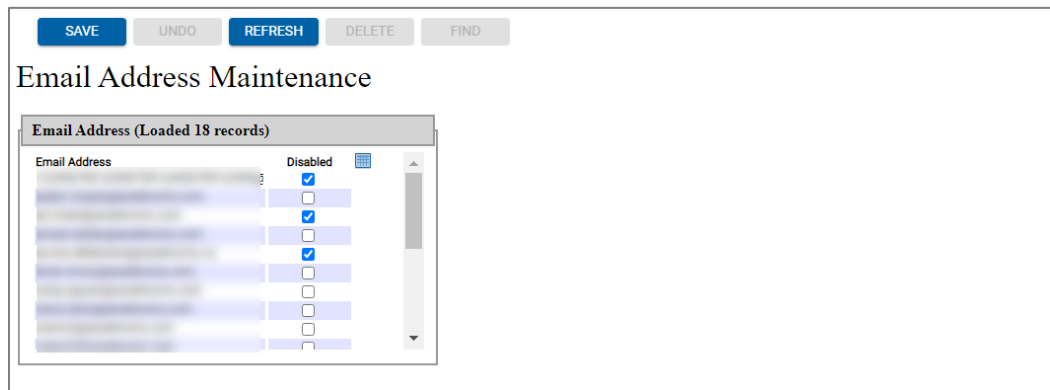
<input checked="" type="checkbox"/> <input type="checkbox"/> Emails not included	<input checked="" type="checkbox"/> <input type="checkbox"/> Emails in group
<div style="border: 1px solid gray; height: 100px;"></div>	<div style="border: 1px solid gray; height: 100px;"></div>
<input type="button" value=">>"/> <input type="button" value="<<"/>	

Email Address Maintenance

The Email Address Maintenance frame manages a list of email addresses that are used for reports and other features of the M5 System. If System Flag 5249 is set to Y, the user is prompted to select an email address from the list of addresses entered here. In order to add an address open the Email Address Maintenance frame. Enter a new email address on the last blank row of the table. Existing email addresses can also be disabled. Select SAVE to update the records.

There is a limit to the total length of the email address on this frame. Currently it can only be 30 characters long.

Note: This is a separate email process than the one that sends an email to the Application User's email address for scheduling notifications. These use the email address provided on the Application User Maintenance frame.



Special Character Rules

- An asterisk (*) cannot be used as the first character of a key field.
- \ is only allowed to specify a host name where it is always double \\.
- A single \ can be used in directory names but they are automatically converted to forward slashes.
- Characters ;^~| are prohibited in all fields.
- Characters ;^~<>' are prohibited in fields that are validated via database lookup.

Appendix A. Role Privileges

Privilege	Definition
ACCIDENT-DELETE	This privilege allows a user to delete an accident on the Accident Entry frame. The accident can only be deleted if it has not been associated with a work order.
ADD DRIVER/VEHICLE	Allows user to add a new driver to TripCard on Card Maintenance, driver tab. Add Driver button is disabled if user does not have this privilege (for TripCard only).
ADD JOB TO COMPL WO	Allows user to add jobs to work orders in completed status.
ADJUST CLOSED WO	Allows user to adjust a closed work order.
ADJ CLS JOB RSN	If the user has this privilege along with the ADJUST CLOSED WO privilege, they can adjust the job reason on a closed work order.
ADJ CLOSED WO - COMM	If the user only has the Adjust Closed WO minus this new privilege, then the commercial charge tab is read only. If the user has both privileges, then the user can adjust all charges on the closed work order.
ADJ COMM FUEL	Adjust commercial fuel charges.
ADJUST CLOSED WO	Authority to adjust a closed work order.
ALLOW NAPA RETURN	Restricts user access on Return checkbox feature within the Part Request Handling frame.
ALLOW NEG RECEIVE	Authority to allow negative receipts into inventory.
AMEND EXTRACTED PO	Allows user to amend Part POs once they are extracted.
ANY-WO-LABOR-DATE	If user is granted this, they will be allowed to enter labor past the WO completed date or before the open date.
APP OWN PART REQUEST	Allows the user to approve their own part request.
APP OWN SVC REQUEST	Allows the user to approve their own service request.

Privilege	Definition
APP/REJ REQ ON FLY	This allows a user to approve and reject a requisition directly on the Part Requisition entry frame.
AUTO UPDATE LTD USE	If a user has this privilege, then they will be able to update life-to-date usage when entering commute usage entries.
APPROVE PART REQUEST	Allow a user to select the approve checkbox on the new Part Request Handling frame.
APPROVE SVC REQUESTS	Allows user to approve Service Requests.
ASSOC TO NEW LOC	The user must have this privilege in order to change the location of a component in the frame, LOCATION COMPONENT ASSOCIATION.
AUTO UPDATE LTD USE	This privilege will automatically update the LTD usage on UNIT USE/COST HISTORY without first prompting the user if they want to update the LTD usage by the same amount.
AUTOISS RSV STK PRTS	This privilege allows users to issue reserved stock parts on Part Receive.
AVAIL BOARD ADMIN	As a default, this privilege is not granted to users. Dispatchers or anyone having this privilege would be able to update anything on the availability board.
AVAIL BOARD LIMITED	As a default, this privilege is not granted to users. Foreman level, only allowed to check and uncheck spares and update parking location where applicable.
BACKDATE-COMM-CHGS	Ability to backdate the invoice date on the Comm tab of the WO to be prior to WO Open Date.
BACKDATE-CONTRACTS	Allows the user to use a contract that is expired as long as it has not been closed.
CAN CLOSE PO	Allows user to cancel and/or close a purchase order from the PO Detail frame.
CE MAIL	Allows Crystal Reports to be emailed to internal email addresses only.
CE MAIL EXTERNAL	Allows Crystal Reports to be emailed to internal and external domains.

Privilege	Definition
CHANGE ITEM SLD UNIT	Privilege is related to the Unit/Component Record Purge batch process, if the user has this privilege they are allowed to change a Unit/Component Item (Exclude from Purge) to Y. Doing so will exclude a particular unit/component from the purge process.
CHANGE OWN NOTES	Allows user to change own notes only and no others. This controls conversation notes on both WO Main and Unit Disposal.
CHANGE PO EMAIL	Allows user to manually override the destination email address at the time of printing for Purchase Orders and Service Orders.
CHANGE WO LOCATION	Ability to change the WO Location on work order.
CHAT	Authority to use M5 Chat functionality.
CHG ASSOC STATUS	This privilege allows a user to manually reset the component status on Component Main.
Chg job visit reason	The user is allowed to change a job visit reason on an open work order.
CHG MASTER PART NO.	Allow a user to change the master part number when a part is being received on the Part Receive frame.
CHG PART NO- PART REC	Allows a user to perform a part number change when receiving parts on Part Receive.
CHG PART NO/QTY	Allows user to change part number and quantity.
CHG SUS PART	Allows user to create superseded parts.
CHG SYMPTOM/SOURCE	Allows a user to change the symptom/source on Work Order Job Detail, Work Request Main, Work Request Query and Work Order Query.
CHG PART NO/QTY	This privilege allows a user to change the part number when approving a part requisition on the Part Requisition Approval frame.
CHG WORK REQ STATUS	Allows user to change status of a work request.

Privilege	Definition
CLOSE DIRECT INVOICE	A user with this privilege is allowed to close a direct invoice entry which will effectively close the work order for the unit.
COMM REC IND ACCT	Allows user to receive commercial services for an indirect account.
COMM REC WORK ORDER	Allows user to receive commercial services for a work order.
COMM VEND	If the user does not have the WO COMM privilege, then they are not allowed to change any commercial charges on Work Order Main.
COMM WO VENDOR	Authority to add any vendor on the commercial work order.
CORE CLAIM CREATE	Authority to create a claim directly on the Core Tracking frame.
CREATE CORE CLAIM	Allows user to create core claim on Warranty Claim Manager.
CREATE SUBRO CLAIM	Allows user to create subrogation claim on Warranty Claim Manager.
CREATE 3RD PARTY CLM	Allows user to create 3 rd party claim on Warranty Claim Manager.
CREATE WARR CLAIM	Allows user to create warranty claim on Warranty Claim Manager.
CREATE DEPT REQ	Gives the user the ability to create a Department Requisition on the fly.
CREDIT WORK ORDER	The new authorization CREDIT WORK ORDER will determine whether the user can use the credit work order option on the part return frame.
DASHBOARD ADMIN	Allows the user to access all users dashboards in order to maintain them.
DELETE WORK REQUEST	Allows user to delete a work request.
DISPOSE UNIT	This privilege allows a user to flag a unit for disposal on Unit Disposal.

Privilege	Definition
DISTRIBUTION CREDIT	Allow a user to apply a credit (negative) entry to be entered within the Supply Distribution frame.
EDIT CONTRACT ON PO	Allows user to edit/update the contract number on a Purchase Order.
EDIT HOME PAGE	Allows the user to add frames, web pages and hyperlinks to their homepage.
EDIT INV ATTACH	Allows user to edit an attachment on an invoice.
EDIT INVOICE CLAIM	Allows a user to edit an invoiced warranty claim.
EDIT METER 1	Authority to update Meter 1.
EDIT METER 2	Authority to update Meter 2.
EDIT OPERATOR NUMBER	If the user is granted this, they will be allowed to edit the operator number on the employee main page.
EDIT SHIP TERMS	Allow a user to enter a valid ship term in the new Part Request Handling frame.
EXCEED BAL AMT CONT	Allows user to exceed the contract balance amount when a line item is approved.
FINALIZE ACCIDENT	Allows user to finalize an accident.
FINALIZE TESTSUITE	Complete Test Suite Results button is not enabled on work order main if user does not have this privilege. The system will display a message, "This function is not active at this time."
IMMEDIATE - REASSIGN	This is a customer specific privilege.
INCIDENT COORINATOR	This privilege allows the user to turn an incident into a WR (thus allowing access to the create WR hyperlink). If not granted then the user won't see the hyperlink on Incident Main.

Privilege	Definition
INCIDENT WO-OPEN	This privilege allows the user to create a work order from an incident from the incident frame using a hyperlink. If the role does not have this privilege, the hyperlink will not appear.
INSERT PART INVENTORY	Authority for user to add a part to their location on the Inventory Location Manager frame.
INV CYCLEDATA SPREAD	Allows a user to spread physical inventory cycle count dates.
INVOICE APPROVAL	Allows user to approve an invoice from the Invoice Approval frame.
INVREC-ATTACH	Gives the user the ability to create attachments on the Invoice Reconciliation frame.
JOB EXCEED WO LIMIT	Allows the user to override the work order cost limit.
LOCK-NOTES	Authority to lock notes to prevent changes.
MOBILE-ADD JOB	Can the user add a job to a work order from a mobile device?
MOBILE-ASSET INVTRY	Allows the user to conduct an asset inventory on a mobile device.
MOBILE-CHG CONFIG	Allows a user to change configuration on a mobile device.
MOBILE-CREATE WO	Can the user create/open a work order from a mobile device?
MOBILE-DEL TRANS	Allow a user to delete transactions on a mobile device.
MOBILE-LABOR	Can the user add labor to a work order from a mobile device?
MOBILE-METER ENTRY	Can the user update meters on the work order from a mobile device?
MOBILE-PART ISSUE	Can the user issue parts from a mobile device?
MOBILE – PART RECEIVE	Allow a user to receive parts using Mobile Focus on a hand-held device.

Privilege	Definition
MOBILE-PHYS INVTRY	Can the user perform physical inventory activities with a mobile device?
MOBILE-WO COMP	Can the user complete a work order using a mobile device?
MOBILE - SUPPLY	Allow a user to use the supply distribution logic that has been added to Mobile Focus.
MOBILE-WORK ORDER	Can the user access the work order frame from a mobile device?
MODE APPROVED LABOR	Allow modification of labor already approved by the supervisor.
MORE THAN 1 OPEN WO	If set to N, then there can only be one open work order per vehicle regardless of maintenance location.
MP ADJUSTMENT	Allows the user to make changes to a completed motor pool ticket including charges.
MP-MANAGER	If the user is granted this, they will be able to see all motor reservation that need to be approved.
MP-RESV-APPROVAL	If the user is granted this, they will be allowed to approve those motor pool reservations for their subordinates.
MP-RESV-ENTRY	If the user is granted this, then they are allowed to create motor pool reservations.
NATIONAL PARTS	Allows user to add/update values in fields on Part Inventory Location Manager that are locked by the National Part flag on Part Main Catalog.
NEW NON-STOCK PART	A new authorization New Non Stock Part was added to allow the creation of new non stock parts on-the-fly from the Purchase Order Frame and Part Receipt (manual receipt only), Purchasing Requisitions, Part Request and Request Handling and Purchasing Contracts.

Privilege	Definition
NEW NSTKPRT LOC	Authorized to all users by default to preserve existing functionality. Determines whether or not to display the popup "part does not exist at receiving location, receive as stock part, receive as non-stock part." If the user has only this privilege they will only see 'create as non-stock part.
NEW PART XREF	Allows user to add new part cross references.
NEW STKPART LOC	Authorized to all users by default to preserve existing functionality. Determines whether or not to display the popup 'part does not exist at receiving location, receive as stock part, receive as non-stock part'. If the user has only this privilege they will only see 'create as stock part.
NEW STOCK PART	A new authorization New Stock Part was added to allow the creation of new stock parts from the Purchase Order frame and Part Receipt (manual receipt only), Purchasing Requisitions, Part Request and Request Handling and Purchasing Contracts.
NOT FORCE TRANSFERS	This privilege will not force a user to transfer parts requested by locations when receiving stock inventory on Part Receive.
NOTE MANAGER	Allows user to change any note regardless of who locked it. This controls conversation notes on both WO Main and Unit Disposal.
NOTES ON CLS WO	Authorized to all users by default to preserve existing functionality. If a user does not have this privilege they cannot edit or add notes on a closed work order.
OVER_RIDE TRANS	Allows user to override card transaction (one time only) on Card Maintenance, card tab. One-time override button is disabled without this authorization.
OVERRIDE METER WARN	Authority to override a meter warning.
OVERRIDE PIN	Authority to log out an employee in Labor Wedge, if you are designated as a supervisor.

Privilege	Definition
PART HND REQ CANCEL	Authorized to all users to preserve existing functionality. Allows user to handle delete REQUEST status on Part Request Handling frame.
PART PICK UP	Gives user the ability to check the Picked-Up check box on the Part Request frame if the request is in READY or REQUEST status.
PART REC MANUAL PO?	Authority to receive parts on a manual PO.
RCPT AT ZERO PRICE	Authority to receipt parts at zero price.
RECON ADJ USER	The user is allowed to adjust an invoice reconciliation.
RPT LOG ADMIN-ALLUSR	Allows user to view/edit reports other than their own.
RPT LOG ADMIN-EDIT	Allows user to use edit feature on their own reports.
RUN IMMEDIATE	Authority to run immediate Crystal Reports.
SCHEDULE REPORT	Authority to schedule Crystal Reports.
SER PART AUTH	Controls the ability to mark a previously missing part to Active again and placed in the appropriate Inventory Location.
SOLD UNIT ARCHIVE	Authority to run the Unit Archiver batch process.
TERM ILR W/BAL	Allows user to edit the terminate checkbox on ILR Terminate frame.
UNIT REQ ADJU	Allow the user to make changes to a unit request.
UNIT REQUEST TIER1	The user is able to approve unit requests.
UNIT REQUEST TIER2	The user is able to create unit purchase requisitions from approved unit requests.
UNITAVAIL-BACKDATE	Authority to backdate the effective date on the Availability Unit Status frame.
UNITAVAIL-COMMENTS	Authority to enter comments on the Availability Unit Status frame.

Privilege	Definition
UNITAVAIL-CONFIRMCT	Authority to confirm the count on Availability Confirmation Count frame.
UNITAVAIL-JUSTIFY	Authority to override the below requirements message. Must be set in relationship to System Flag 2038.
UNITAVAIL-OPERSTAT	Authority to change operational status, effective date, est. days OOS and comments on the Availability Unit Status frame.
UNLOCK CAMPAIGN	Allows a user to unlock a finalized campaign so the units in the campaign can be modified and re-finalized. Dates cannot be modified.
UPD ACQ DATE	Allows user to update the Acquisition Date and Meter values on the Unit Main Acquisition Meter Information control.
UPD ARRIVAL DATE	Allows users to update the Arrival Date value on the Unit Main Acquisition Meter Information control. Note: Meter values cannot be updated unless users have the UPD ACQ DATE privilege as well.
UPD CMR PREFIX	Allows a user to override the User Value setting for System Flag 5010.
UPD EQUIP USAGE	Allows a user to edit an existing equipment timesheet record entered on the Equipment Timesheet frame.
UPD FINAL ACCIDENT	Allows user to update a finalized accident.
UPD IN-SERV DATE	Allows a user to edit the in-service date on Unit Main.
UPD RESV UNIT STATUS	This privilege allows a user to update the label and description of the six unit status codes located on the Unit Status Codes frame. The status codes B, O, I, A, D, S have imbedded application logic within M5.
UPD AUTH COMM AMT	Authority to enter and update the vendor commercial charge authorization amount on Work Order Main and Work Order Express.

Privilege	Definition
UPD SAFETY DATA	Allows user to update the Defect No, Defect Date and Cannot be Driven checkbox for the existing data on WR Main and WO Main. User without this privilege can only enter the new data but cannot update after data is saved.
UPD SOLD UNIT DISP	Allow the user to update the replacement unit and several sales and financial fields to be changed on the Unit Disposal frame after a unit has already been sold or disposed of.
UPD TIME LABORWEDGE	Allows the employee to update time when scanning time in the Labor Wedge frame.
UPD UNIT HIST	Allows the user to update unit history from the unit use/cost history frame.
UPD UNIT ON CATEGORY	Allows a user to push changes made to the category code down to units and components by making the new tab called Units/Comps on Category Main editable.
UPD WARR TECH SPEC	If the user has this privilege they will be able to modify any tech spec warranty terms that has the template flag selected.
UPD WO PARTS	Authority to update work order parts information.
UPD WO CORE COST	Allows user to update the core cost on Work Order Main if the part is a core part. For a closed work order, if the user has this privilege AND the ADJUST CLOSED WO privilege, they can also update the core cost.
UPDATE WO ZERO EST HRS	Allows the user to update the four time-related value fields on a work order (Labor/Shop/Contingency/Book and Est. Hrs. on the Job Line - accessed underneath the pencil icon in Work Order Main/Estimates Tab) when the current value is not zero.
UPDATE CARD STATUS	Allows user to update card status for TripCard on Card Maintenance, card tab. Update card next to card status is disabled without this privilege (for TripCard only).
UPDATE FAILED TRANS	Allows user to update failed transactions and save/resubmit them (for TripCard only).

Privilege	Definition
UPDATE PART INVENTORY	Authority to update part inventory.
VG VIEW ALL DOCS	Controls whether a role can view Vendor Gateway tickets for location groups other than its own.
VENDOR MERGE	Allows user to execute a vendor merge on the Vendor Main frame, provided System Flag 5385 is not set to V.
VEH SAFE TO DRIVE	Allows the user to select the Safe to Drive checkbox on the Vehicle Safety Query frame for any failed test suite regardless of the status of defect jobs.
VIEW ALL ACCIDENTS	If set to Y, then the application user can only view the accidents they created, otherwise, they can view all accidents.
WARR CANCELLATION	Allows user to cancel a warranty.
WO W/DIFF MAINT LOC	Allows user to open up a work order on a unit from a different maintenance location other than the unit's maintenance location.
WO-COMP-CLO ESTIMATE	If the user is granted this, then they can edit the estimated hours on WO main if the WO is completed or closed.
WO-OPEN ESTIMATES	If the user is granted this, they are allowed to edit the estimated labor hours column on WO Main.
WOUNITALL - CANCEL	Allows the user to cancel a work order from work order main.
WOUNITALL - CLOSE	Allows the user to close a work order from work order main.
WOUNITALL - COMMERCIAL	Allows the user to add commercial charges in work order main.
WOUNITALL - COMPLETE	Allows the user to complete a work order from work order main.
WOUNITALL - DOWNTIME	Allows the user to suspend/unsuspend downtime.
WOUNITALL - FLUID	Allow a user to issue fluids on Work Order Main.
WOUNITALL – HISTORY	Obsolete

Privilege	Definition
WOUNITALL - JOBS	Allows the user to add jobs to Work Order Main.
WOUNITALL - LABOR	Allows the user to add labor charges to a work order from Work Order Main.
WOUNITALL - OPEN DATE	Allows the user to change open date in Work Order Main.
WOUNITALL - PARTS	Allows the user to charge parts from Work Order Main.
WRITE TO NEW FILE	Obsolete
WR MASS DELETE	Allow a user to mass delete work requests on the Work Request Query frame.
ADJ COMM FUEL	Gives user the ability to adjust commercial fuel charges.
UPDATE FAILED TRANS	Will allow users to resubmit failed transactions on Transaction Summary (TRIPCard Portal).
ADD DRIVER/VEHICLE	Depending on types of cards setup, will allow users to add drivers/vehicles on Card Maintenance (TRIPCard Portal).
UPDATE CARD STATUS	Will allow users to change the status of a card from Active to Blocked or Blocked to Active on the Cards Tab (TRIPCard Portal).
REQUEST CARD	Allows users to request cards on Cards tab of Card Maintenance (TRIPCard Portal).
OVER_RIDE TRANS	Allows users to perform one-time override on transaction that failed due to limit restrictions (TRIPCard Portal).
AMEND EXTRACTED PO	Allows user to amend Part POs after they are extracted.
UPD EST JOB COST	Allows user to update estimated cost on work orders.
CREATE CORE CLAIM	Allows user to create core claim on Warranty Claim Manager.
CREATE SUBRO CLAIM	Allows user to create subrogation claim on Warranty Claim Manager.
CREATE 3RD PARTY CLM	Allows user to create 3 rd party claim on Warranty Claim Manager.

Privilege	Definition
CREATE WARR CLAIM	Allows user to create warranty claim on Warranty Claim Manager.
UPD WO PLAN DATE	Allows user to update Planning Date field on Work Order Job detail.

Appendix B. System Flags

Please see the *System Flags Table* for a complete listing of all the flags.

Appendix C. M5 Params

Variable Name	Description	Comment
ACTIVATION_KEY	This code supplied by AssetWorks activates special features or options in the product that you have licensed.	N/A
ADHOCBI_API_SITE	Defines the API site that contains the new version Adhoc software.	Defaults to /M5AdhocBIApi.
ADHOCBI_RPTDB_USE	Use a reporting database for adhoc reports? (Y or N)	Setting this to Y also requires adding the connection string for the reporting database to M5_INIT.RPT_CONNECT_S TRING. An existing connection string in Izenda will need to be deleted on Adhoc Query Admin screen, and recreated using Sync Datasources.
ADHOCBI_SITE	Defines the core site that contains the new version Adhoc software.	Defaults to /M5AdhocBICore.
ADHOCBI_SUPER_USERS	List of Adhoc Super Users who will have access to settings tab.	
ADHOCBI_TENANT_ID	The TENANT ID to use for Adhoc.	Defaults to COMPANY CODE.

Variable Name	Description	Comment
ADHOC_REPORT_PATH	The directory where Legacy Adhoc reports are stored. This directory, much like the ATTACHMENTS_DIR must be a shared directory available to all servers. This parameter only needs be valued if you are licensed for Adhoc reporting in FleetFocusM5. There is a component of the activation key to allow Adhoc access.	If M5 is installed in a load balanced environment, this directory must be a shared directory, so the reports are available to all servers. This directory must be writable by the identity that runs the M5 IIS web services.
ADHOC_SITE	Defines the site that contains the Adhoc software.	Defaults to /M5Adhoc.
ADHOC_WEB_SERVER_LIST	When running Adhoc in a web farm this parameter must list the rs.aspx page for each machine in a comma delimited list. If not running in a server farm this parameter should be null.	Example: http://m5apb01/m5web/adhoc/rs.aspx,http://m5atb02/m5web/adhoc/rs.aspx,http://m5atb03/m5web/adhoc/rs.aspx
ADMIN_SETTINGSREFRESHSECS	Number of seconds to preserve user's settings in server cache, 0-3600.	Set to 0 during setup so changes take effect immediately.
ADMIN_SETTINGSSHOWALERTS	Show response pop up for system vehicle alerts?	
ASSET_TYPE_SQL	This is used by the Performance Measures and Monitor module of FleetFocus. It needs to be valued with a SQL Statement that describes the asset type used by PMM. AssetWorks will work with the client to properly set this value. PMM is a licensed module that requires an appropriate activation key to access the module.	N/A

Variable Name	Description	Comment
ATTACHMENTS_ALLOW_URN	Allows association to a file that has not been uploaded into M5.	<p>If “N” the “attach windows file” link will not be shown.</p> <p>This should normally be “N” or null because it has additional security requirements and is problematic if the files are moved or deleted outside M5</p> <p>This option requires that all end users that need to view these files have security to read them directly. This will not work if you cannot open the file from your machine with your windows credentials.</p> <p>If “Y”, the user will be allowed to associate files that are not uploaded into M5 with an M5 record the same way normal attachments are handled.</p> <p>This option is only available in Internet Explorer.</p> <p>Forward slashes must be used.</p> <p>A third option is available for this parameter and that is to specify a directory root. In this mode all URN attachments must exist in this one directory.</p>
ATTACHMENTS_DIR	The directory under ATTACHMENTS_ROOT where attachments are to be stored.	<p>If M5 is installed in a load balanced environment, this directory must be a shared directory, so the attachments are available to all servers.</p> <p>This directory must be writable by the component’s identity account and readable by an M5 web user. For non-authenticated sites, it must be readable by the IIS anonymous user account.</p> <p>The highest level of the value specified here must be the same as the virtual directory name used to view the files.</p> <p>Note: Use forward slashes only.</p>

Variable Name	Description	Comment
ATTACHMENTS_EXTENSIONS	This is a semi-colon delimited list of file extensions that may be uploaded to the server. This list will default to allow all files to be uploaded except executables.	Executables are never uploaded to the server. Executables extensions include com, exe, bat, cmd and dll files.
ATTACHMENTS_ROOT	This is normally the Web Site root for example ("c:/inetpub/wwwroot").	This must be the real directory, not the virtual directory as addressed by the web server. If not specified, the file attachment feature will not be available.
CE_EMAIL_AUTHENTICATION	Email authentication type used to access the mail server when Crystal Enterprise emails report output. 0 = no authentication 1 = Plain text 2 = Login If "0" is selected, CE_EMAIL_USER and CE_EMAIL_PASSWORD are not relevant.	N/A
CE_EMAIL_BODY	Email body text used when a report is delivered to a user via email.	This can have links to where the user can obtain the free Crystal report viewer.
CE_EMAIL_DOMAIN	This is the domain name of the site's SMTP server	N/A
CE_EMAIL_OVERRIDE_SENDER	Override email from address for all reports.	Normally this should not be set. The email address will then become the email address of the user running the report. If it is necessary to override this value, this can be set to a value such as "server@yourdomain.com".
CE_EMAIL_PASSWORD	This is the password to the SMTP mail server if authentication is required.	N/A
CE_EMAIL_PORT	The port the SMTP server listens on. The default is 25.	N/A
CE_EMAIL_SERVER	This is the name of the site's SMTP server.	N/A
CE_EMAIL_SSL	Send email using SSL.	Y or N

Variable Name	Description	Comment
CE_EMAIL_USER	This is the user id to the SMTP mail server if authentication is required.	N/A
CE_GROUP_IMMEDIATE_JOB	The Crystal Enterprise server group that handles Run Immediate reports.	This value is determined during the BOE or CRS install.
CE_GROUP_LONG_JOB	The Crystal Enterprise server group that handles long running or low priority reports.	This value is determined during the BOE or CRS install.
CE_GROUP_MEDIUM_JOB	The Crystal Enterprise server group that handles medium priority reports.	This value is determined during the BOE or CRS install.
CE_M5CRYSTAL_HOST	This overrides the protocol and host name used to make requests to the M5Crystal website.	If unspecified the default is the WEB_HOST parameter and if that is null, then it will use the protocol and host used to log into M5.
CE_SUPPORT_RPT_FORMAT	N=Not Supported (Default) Y=Supported	If you choose to turn this on you must understand it is your responsibility to provide the software to support the .rpt format. This means if users receive a .rpt formatted file via email the user must have at least the Free Crystal viewer installed on their desktop. If the users schedule .rpt formatted reports to the in-bin, the web server must either have Crystal Reports installed to process these files or they must create a new IIS mime type that associates the .rpt extension to application/crystal. This mime type will allow IIS to service the extension and allow the client to either open the file with their locally installed software or save it to their disk.
CODE_LOCALE_IDS	Sets the three locale_ids used when displaying code descriptions in other languages. The local ids are separated by a semi-colon.	Note: You need to set this to match the locale you are supporting. For instance, if you allow ES-MX to roll-up to ES you must enter ES here.

Variable Name	Description	Comment
CRYSTAL_EXTERPRISE_APS	The name of the Crystal Enterprise machine that M5 will connect to for all users.	This is the APS name entered while installing BOE or CRS. This is not an IP address and it does not begin with back slashes.
CRYSTAL_ENTERPRISE_BIN_DIR	The directory structure under the BIN_ROOT where the bin output is stored. This is easier if you think of this as just the share name. The top-level directory specified here will become the Virtual Directory name on the M5 IIS server.	Example: /CE_BIN
CRYSTAL_ENTERPRISE_BIN_LOCAL	Local path that is located on the Crystal server. This is used to write the output from the Crystal Services without needing to use the URN created by the concatenation of "bin_root" and "bin_dir".	This should normally be null. Set this only if changing the user in the Central Management Console does not solve the permission problem when trying to write to the M5 in-bin.
CRYSTAL_EXTERPRISE_BIN_QUOTA	This parameter allows an installation to enter a space quota for in-bin directories.	The default is 0 which means unlimited. If 100 is entered, each folder can contain up to 100 megabytes. If the quota is exceeded the user must delete files to drop below the limit or they will not be allowed to view reports in that folder.
CRYSTAL_ENTERPRISE_BIN_ROOT	The machine name that owns the shared bin area.	Example: \\M5CEBIN Note: It can only be a local specification if the web server and the crystal server are on the same machine.
CRYSTAL_ENTERPRISE_ODBC	The ODBC name to be used for all reports executed in Crystal Enterprise.	N/A
CRYSTAL_EXTERPRISE_OUTPUT_PATH	A directory on the Crystal Enterprise machine where report output can be written.	This directory should be shared so the end user can access the output file. Set this value and any output path in the application user to null to turn off the "file" feature.

Variable Name	Description	Comment
CRYSTAL_ENTERPRISE_RPTDB_ODBC	The ODBC name for the reporting database to be used for all scheduled reports to be executed in Business Objects Enterprise or Crystal Report Server.	
CRYSTAL_ENTERPRISE_RPTDB_USE	Use a reporting database for schedule reports? (Y or N)	Setting this to Y also requires adding the connection string for the reporting database to M5_INIT.RPT_CONNECT_STRING and creating an ODBC connection on the Crystal/BOE server. After configuration, reports will need to be rescheduled
CRYSTAL_ENTERPRISE_VERSION	The version of Crystal Enterprise that M5 will be connecting with.	Valid values are BOE (Business Objects Enterprise) or CRS (Crystal Report Server).
DEFAULT_HOMEPAGE	This is the homepage that will be used for clients that did not license screen designer and for all users that do not have a private home page specified in their application user definition.	Defaults to AWHP_DEFAULT1
DEFAULT_LOCALE_ID	Default Locale used for batch jobs.	Defaults to EN-US.
EMPLOYEE_CONTINUOUSCLOCK	Required employees to punch into something when punching out, except for a Clock out button.	N/A
ENCODING	Defines the character encoding being done to support the characters needed by the language.	For English it should be ISO-8859-1. For Unicode it should be set to UTF-16.
EXTERNAL_AUTH	Semi-colon delimited list of external authentication methods to be used. The user id is extracted from the HTML headers or interface and the logon screen is not presented to the user.	The value(s) entered here must be supported authentication types. Refer to the section on external authentication for more information.
EXTERNAL_AUTH_LDAP_BASE_USER	An USER_APP record that will be used as the basis for creating a new user if allowing automatic user creation.	If not using LDAP or SAML authentication this parameter can be left blank. For LDAP or SAML authentication this must be a valid user even if the create feature is off.

Variable Name	Description	Comment
EXTERNAL_AUTH_LDAP_CREATE_USER	When using LDAP or SAML authentication a “Y” in this parameter indicates that the shadow M5 USER_APP record should automatically be created if the user has never logged on before.	If not using LDAP authentication this parameter can be left blank. If this is not a “Y” the M5 user record must be manually created before the user can connect. If you are using active directory, this is now functioning the same as NT authentication which may be a simpler setup and more secure choice for your installation.
EXTERNAL_AUTH_LDAP_DEF_ROLE	When the M5 LDAP or SAML interface creates a new application user record the role will be set to this value.	The role can be mapped to an LDAP attribute. This parameter value will only be used when the mapped value is blank or was not supplied by the LDAP interface.
EXTERNAL_AUTH_LDAP_PATH	When using LDAP authentication this is the path to connect to the LDAP server.	Example: LDAP://adserver.mydomain.com:389/cn=Users,dc=asd,dc=east
EXTERNAL_AUTH_NOT_M5_USER_URL	This is a URL where the user will be redirected when the user id extracted from the HTTP headers is not a valid M5 user id.	If specified, it must begin with http://. If LDAP authentication is implemented with the “CREATE_USER” option, the M5 user will automatically be created making the value of this parameter moot.
EXTERNAL_AUTH_NO_USER_URL	This is a URL where the user will be redirected if the user id information is not found in the HTTP headers when the system is in external authentication mode.	If specified, it must begin with http://.
EXTERNAL_AUTH_SAML_IDP_URL	This is the URL M5 will use to transfer to the SAML identity provider.	N/A
FROM_EMAIL_NAME	The name that will be used as the email “from” for some processes.	Defaults to “FleetFocus”.
GENERAL_ATTACHMENT_HOST	Server where the attachments are located.	Probably the M5 application server.

Variable Name	Description	Comment
GENERAL_MESSAGEPOLLING_INTERVAL	The number of seconds between each poll of the database for messages.	Default of 60 seconds.
INSTALL_ROOT	The physical directory where MFIVE is installed.	Normally C:/MFIVE or C:/INETPUB/WWWROOT. This is the physical directory above the compiled web code tree.
INTERFACE_FILE_ROOT	The root directory for interface files	N/A
INVENTORYCOUNT_COMPLETEDSINCE	Location Inventory Counts, and My Inventory Counts pages show counts completed in the last X days.	N/A
INVENTORYCOUNT_INDIRECTCODE	The default Indirect Account if inventory count has none defined.	N/A
JS_SERIALIZER_MB	Sets the JavaScript Json Serializer max length in megabytes. The minimum value is 16 and the maximum is 200.	
LOGON_DOMAIN_SPECIFICATION	Provide options to make entry of the user id more compatible with other applications the user accesses every day.	A = Add the CE_EMAIL_DOMAIN value to the user id if a domain was not specified. R = Remove all domain specifications. N = Do nothing (default) This is only used for LDAP and M5 authentication. LDAP and M5 user processing is done before authentication. SAML is done after so this parameter will not affect the user id that gets entered at the IDP site.
LOGON_FAILURE_LIMIT	The number of consecutive times a user may enter a wrong password before having their account locked.	Once the account is locked it must be unlocked by an M5 administrator. If this parameter is not defined it will default to 3.

Variable Name	Description	Comment
LOGON_IMAGE	<p>The name of the image file or files (in the image virtual directory) that will be displayed on the logon page.</p> <p>If you specify multiple images they must be delimited with a semi-colon. Multiple images will be displayed in sequence.</p>	<p>The image file may be any valid format that can be displayed by the browser.</p> <p>This parameter is site specific meaning the m5site may be specified in the "scope" field. If the site value is not found, the parameter with a scope of an asterisk will be used.</p>
LOGON_INACTIVE_DAYS	<p>If an account has not been used for this number of days, it cannot be used again without administrator's interaction.</p>	<p>Default is 90 days.</p> <p>This parameter does not apply if using external authentication.</p>
LOGON_MENU_IMAGE	<p>The name of the image file displayed on the top left of the M5 screen above the user's menu.</p> <p>If you need to differentiate your different M5 environments, you may specify a background color with the image name.</p> <p>For instance, you could specify "menu_frame_logo.png;green". Assuming the image file is transparent, this command would change the background to green without the need of creating an alternate image.</p> <p>Prefix the path with "../images/".</p>	<p>Defaults to "menu_frame_logo.png".</p> <p>If you specify a background color it must be separated from the image name with a semi-colon. The image must be transparent to support this feature.</p> <p>You may specify the color as a named color or using the #rrggbb hex format.</p>
LOGON_MULTIPLE_TIMES	<p>A value of "N" prevents the same application user from having multiple simultaneous sessions.</p>	<p>Primarily used for clients that have a user license.</p>

Variable Name	Description	Comment
LOGON_REMEMBER_USER_ID	Controls if the “Remember my logon information” checkbox is displayed on the logon screen.	<p>Valid values are Y, N, and U.</p> <p>If the installation does not allow security information being stored in cookies this should be set to an “N”.</p> <p>A value of U means only to remember the user ID and not the password.</p> <p>When using external authentication and this value is defined as Y, it is forced to be a U so that non M5 passwords never stored in M5.</p> <p>This parameter is site specific meaning the m5site may be specified in the “scope” field. If the site value is not found the parameter with a scope of an asterisk will be used.</p>
LOGON_TWO_FACTOR	Two factor authentication mode for M5 users	<p>The scope of this parameter is site.</p> <p>Null = none (default)</p> <p>EMAIL = All users are sent a one-time code that is required to logon.</p> <p>EMAIL_BY_ROLE = Users that have a role that specifies two factor authentication will be sent a one-time code required to logon.</p> <p>The email is sent to the application user’s email.</p>

Variable Name	Description	Comment
LOGON_TWO_FACTOR_PORTAL	Two factor authentication mode for portal users.	<p>The scope of this parameter is site.</p> <p>Null = none (default)</p> <p>EMAIL = All users are sent a one-time code that is required to logon.</p> <p>EMAIL_BY_ROLE = Users that have a role that specifies two factor authentication will be sent a one-time code required to logon. Note: The role is the role of the surrogate user.</p> <p>The email is sent to the email address on the EMP_MAIN table.</p>
LOGON_USER_CHANGE_PW	A value of "Y" adds a checkbox to the logon page that allows the end user to change their application password.	<p>Valid values are "Y" and "N".</p> <p>When using external authentication this parameter is ignored.</p> <p>This parameter is site specific meaning the m5site may be specified in the "scope" field. If the site value is not found the parameter with a scope of an asterisk will be used.</p>
LOGVIEWER_DIRECTORIES	This specifies the list of servers to view logs from. UNC path(s) to the M5TMP folder separated by semicolon.	Semicolon separated list of network shares(s).
LOGVIEWER_EXCLUDED_PREFIXES	Specifies the log prefix folder(s) to exclude from the viewer, separated by semicolon.	<p>Semicolon separated list of categories (<Prefix Folder>) to exclude from the Log Viewer frame.</p> <p>Only applies when INFO=ANY is used.</p>
LOGVIEWER_FILE_DIR	<p>This specifies the root level folder name for log files stored under the M5TMP folder.</p> <p>If unspecified the default is "M5LOGS".</p> <p>If specifying, recommendation is to use site name.</p>	<p>Root Folder definition. (Primarily needed for ASP clients). If left blank, the <Root Folder> will default to 'M5LOGS'</p>

Variable Name	Description	Comment
MASTER_COMPANY	For Oracle Enterprise installations that share code tables between multiple VPD companies this specifies the code of the company that owns and can maintain the shared tables.	If the installation is not using Oracle Enterprise or is not using shared code tables, this parameter should be left blank.
MAX_DASHBOARD_PROCESS_PER_RUN	Controls the maximum dashboards that will be processed in one execution of BinScan. A value of 0 means all expired dashboards will be processed. If not specified this value will default to 20. Note: REPORT_BIN_SCAN_MINUTES controls how often BinScan runs.	This value will help the BinScan Page from timing out. The value must be high enough so the dashboard process can get through all the dashboards before they start expiring again.
MAX_DASHBOARD_RECS	The maximum number of rows that can be returned by any dashboard SQL in XML mode.	This does not cancel the query; it prevents the creation of XML rows in the table. If not specified, defaults to 5000.
MAX_LOV_RECS	The maximum number of rows that can be returned by any "list of values" request.	If a request is made that returns more rows than allowed a message is displayed at the end of the list indicating the list is not complete.
MESSAGE_ENCRYPTION	This controls the encryption level on all messages sent to the web server. When this parameter is changed, the change will not be picked up until the user logs off and back on.	0=No encryption. This should only be used for problem diagnostics. 1=Session encryption. All messages from the user session are encrypted with the same random key. This is the default value. 2=Utilize a nonce where the encryption key changes for every page.
MULTI_CURRENCY_ACTIVE	A value of Y activates the multi-currency features of M5. To activate this feature involves creating database triggers and several other setup steps.	N/A
MULTI_CURRENCY_BASE_CURRENCY	The three-character base currency.	The multi-currency feature of M5 requires database changes so this option cannot just be turned on to activate the feature.

Variable Name	Description	Comment
OFF_HOURS	"Off peak hours" when Crystal Reports should be run.	This time is expressed in 24-hour clock format. This value is used when a user pressed the "Off Hours" button when scheduling a Crystal report.
ORACLE_USER_DEFAULT_QUOTA	The space limit an Oracle user may consume in the default tablespace.	This value is only used when the user id is created.
ORACLE_USER_DEFAULT_TABLESPACE	The default tablespace for Oracle accounts that are created through the M5 application.	This value is only used when the user id is created.
ORACLE_USER_TEMP_TABLESPACE	The temporary tablespace for Oracle accounts that are created through the M5 application.	This value is only used when the user id is created.
PAGE_PAGESIZE_DEFAULT	Records to show per page as a default.	N/A
PAGE_REFRESHSECONDS	A page with a refresh button automatically refreshes every this many seconds.	N/A
PAGE_TACH_TOOLBARREFRESHSECS	How often should the assigned tasks count be refreshed?	N/A
PARTS_REQUEST_APPROVALREQUIRED	Do part requests require approval at all?	N/A
PARTS_REQUEST_MAKEREADYNEEDED	Does the storekeeper need to move it to READY manually when available/	N/A
POPULATE_SECURITY_FIELDS	Indicates to the buildSecureField method that it should maintain the FRM_WITH_SECURABLE_FIELDS and FRM_SECURABLE_FIELDS tables. Valid values are "Y" and "N".	Automatically inserts default data for new frames. Note: The field name is used as the column name so it will not be internationalized. Note: This feature does add overhead to page generation because extra SQL commands must be executed to determine if the tables are up to date.
PROJECT_HELP	The directory name (path) of the M5 help site.	The value is normally /M5Help/WebHelp
PROJECT_HELP2	The help directory for the first additional locale.	

Variable Name	Description	Comment
PROJECT_HELP3	The help directory for the second additional locale.	
PW_EXPIRE_DAYS	This defines how many days a user password will remain valid.	A value of null or 0 means the user password will never expire. This is a global default for all users. If a value is specified in the USER_APP table, it will override this value for that user.
PW_TEMP_DAYS_VALID	This controls the number of days a temporary password will be valid before the account is disabled. A temporary password is created when an administrator does both of the following actions: 1) Creates a new account or changes the password on an existing account. 2) Selects the "Force password change next login" checkbox.	0=forever 1=just today 2=2 days 3=3 days, etc. The temp password is valid to midnight on ending day.
RECORD_PERFORMANCE	Indicates if user activity should be recorded. Each visit to a page and XML routine will be recorded as user activity. Valid values are "Y" and "N".	This adds a lot of overhead to the system and should only be set to a "Y" at AssetWorks' advice. This feature does provide useful information when trying to diagnose a problem. If this feature is turned off the Show User Activity frame will not function.
REPORT_BIN_SCAN_FUNCTIONS	This parameter can be used to limit what functions the background process called Bin Scan performs. The options are specified as one string separated by semi-colons. An N means do not perform this function. This should only be set if functions are not used or they are causing performance issues.	The scope of this parameter is site. BIN = Look for new reports in the user's private in-bin GRPBIN = Look for new reports in shared group bins. DASH = Dashboards NOTE = Notification count on navigation bar TODO = To do list (future) The delivered default for this parameter is BIN=Y;GRPBIN=Y;DASH=Y;TODO=Y;NOTE=Y

Variable Name	Description	Comment
REPORT_BIN_SCAN_MINUTES	<p>The number of minutes that elapse between automatic server requests being made by an M5 user to update the bin icon state. This process also marks folders as containing something new.</p> <p>Users will be able to retrieve new output from the bin even if this process has not run but they will not be notified of the output availability by the icon changing appearance.</p> <p>This number should not be too low as it does create a fair amount of server overhead as the number of M5 users increases.</p>	<p>The default value is 5.</p> <p>The minimum is 4.</p> <p>This is the rest time after execution completes and the next execution begins.</p>
RUN_IMMEDIATE_REFRESH_LIMIT	The number of times the Run Immediate Viewer process will poll the server looking for report output before it assumes the report failed.	Default is 50.
SAVE_TIMEOUT_SECONDS	The number of seconds the client side screen will wait for a save action to respond.	The default is approximately 120 seconds.
SERVER_CHAT	The URL of the server that is supporting the M5 chat service. This is only the base name such as http://m5prod.whatever.com .	Must include protocol such as, http:// .
SCHEDULER_API_KEY	This is the Scheduler API Key.	
SCHEDULER_API_URL	This is the Scheduler API URL.	
SCHEDULER_KEY	This is the FullCalendar Scheduler License Key.	
SQLSERVER_DATABASE_NAME	The name of the SQL Server database. For an Oracle installation this value is not used.	This must match the "initial catalog" that is specified in the OLEDB connect string.
SUBMIT_API_KEY	The SHA256 Hash code to validate the M5SubmitService API.	N/A
SUBMIT_API_URL	The url to be used for the install location of the M5SubmitService API.	N/A

Variable Name	Description	Comment
TIMEOUT_MINUTES	The number of minutes an M5 user can be idle without timing out.	A value of null or 0 means the user session will never timeout. This is a global default for all users. If a value is specified in the USER_APP table, it will override this value for that user.
UIA_REJECT_URL	The URL to be used when resubmitting rejected interface records.	It is the URL of the iPortal web service on the batch server.
UNICODE_DB	This must be a "Y" if the database being used is using the Unicode character set.	N/A
USERPREF_AUTOCOMPLETE	Sets the default for all users so the autocomplete function is on ("Y") or off ("N").	Default is "Y".
USERPREF_DASHBOARD_GRID	Sets the default for dashboards to a 4x4 grid for all users. Users can overwrite by changing their preference. "Y" or "N".	Default is N.
USERPREF_RIBBON_COLOR	Sets the default color for the M5 ribbon for all users. The value is a number starting with 1 and corresponds to the colors on the profile screen going left to right.	Default is 1.
USREPREF_SHOW_ICONS	Set the default for all users so they see icons in the M5 ribbon instead of the ellipses [...].	Default is "N".
WARN_USER_LICENSE_EMAIL	The email address that will receive warning messages about the user license percent being exceeded.	N/A
WARN_USER_LICENSE_PERCENT	If you have an M5 user license this parameter defines a threshold when exceeded will send an email to the address defined by the WARN_USER_LICENSE_EMAIL parameter.	Value is 1-99. The site must have log event LON turned on.
WEB_HOST	This overrides the protocol and the server name the user is logged into. It is mainly used to diagnose problems on load balanced servers and should otherwise be blank.	N/A

Variable Name	Description	Comment
WORKORDER.POPUPCREATE ALERT	Show response pop up for system vehicle alerts when creating work orders?	WORKORDER.POPUPCRE ATEALERT
WO_POPUPCREATEALERT	Show response pop up for system vehicle alerts when creating work orders?	
WO_REPAIRREASONDEFAULT	Visit reason on new work order.	N/A
WO_TASK_LABOR_AFTERWOF INISHDAY	Value ignored if user does not have ANY-WO-LABOR-DATE authorization.	N/A

Updates

Release	Section	Description
23.1	Appendix B – System Flags	Added System Flags 5520, 5521, and 5522.
23.2	Appendix B – System Flags	Updated System Flag 5010 user value and role privilege.
23.2	Appendix A – Role Privileges	Added role privilege UPD CMR PREFIX.
23.2	Holiday Calendar	Added Location Group to the Holiday Calendar.
23.2	Email Group	Added Email Group section.
24.0	Setting and Maintaining System Flags Appendix B – System Flags	Updated the reference to the System Flags Table. Removed the System Flags table. Updated the reference to the System Flags Table.
24.0	Privileges tab Department/Chat Groups Customer Data View Users M5 Parameter Query Frame View Log Files in M5	Updated the reference file title names.
24.0	Email Group	Updated the functionality of System Flag 5249.
24.2	Appendix A – Role Privileges	Added role privilege SER PART AUTH.
24.2	Appendix C: M5 Parameters	Added new M5 Parameters: <ul style="list-style-type: none"> ADHOCBI_RPTDB_USE CRYSTAL_ENTERPRISE_RPTDB_USE CRYSTAL_ENTERPRISE_RPTDB_ODBC
24.3	System Version	Replaced the System Version image.
24.3	Available Notifications List Notification Variables, Qualifications, and Recipients	Added PART TRANSFER REQUEST CREATED notification.

Release	Section	Description
24.3	Available Notifications List Notification Variables, Qualifications, and Recipients	Added new notifications: <ul style="list-style-type: none">• EQUIPMENT CHECKED OUT• EQUIPMENT REQUEST CREATED
24.3	Available Notifications List Notification Variables, Qualifications, and Recipients	Added new notifications: <ul style="list-style-type: none">• PART REQUEST CREATED• PART REQUEST READY
24.3	Available Notifications List Notification, Variables, Qualifications, and Recipients	Added new notifications: <ul style="list-style-type: none">• SENSOR ALARM• SYSTEM ALARM