
CUSTOMER GUIDE: How to Store and Use Attachments

Overview

FLEETMATE enables you to relate externally stored content (pictures, documents, etc.) to assets, and to work orders. This document will explain the best method for using this feature, and for storing this content.

Storage Location

FLEETMATE offers a *Fixed Folder* approach to storing your images and attachments. Using Fixed Folder is the simplest and *recommended* option.

Using this approach requires that you define one (1) folder that will contain all attached images, documents, and other types of content. This avoids any uncertainty concerning where your attachments are located, and where you should store new attachments.

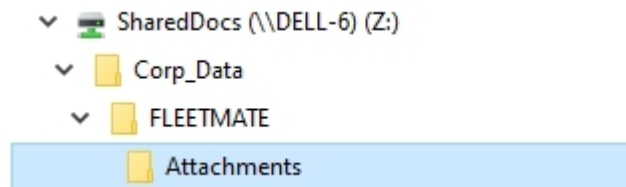
In a network, multi-user environment, this storage location should be on a network file server, so that any user on your network can access this shared content.

Another benefit is portability. You can easily move your attachments to a different storage location in the future. Each user can simply adjust the new attachment storage location in FLEETMATE using the Options | Preferences... menu.

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Example Folder Structure

You may define any folder in the Windows file system as your storage location. In this example, we have established a folder to use to store all attachments. That folder structure is pictured below. Note that this folder structure has been setup on a network file server.



Sample Folder Structure

In this example, file server DELL-6 is mapped to drive letter Z.

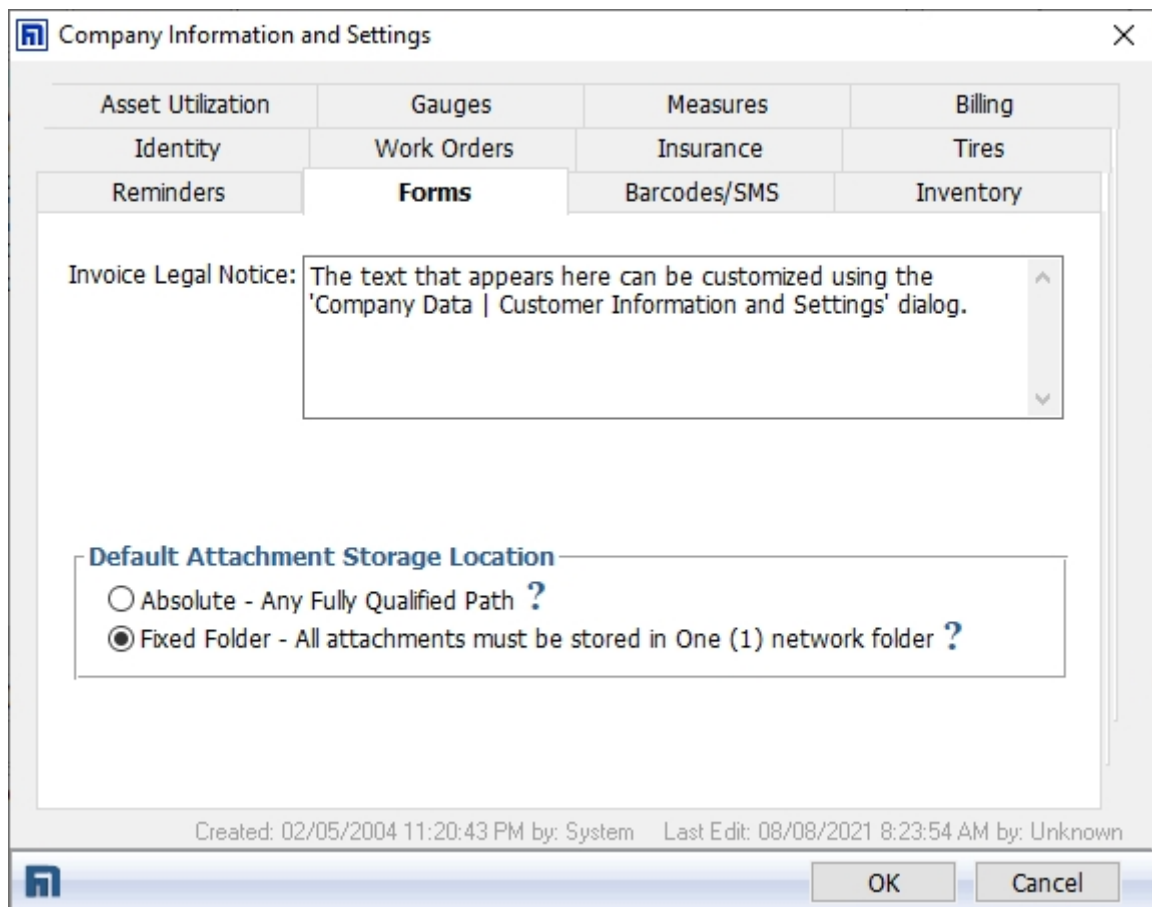
All externally stored content (e.g., jpg, bmp, gif, doc, xml, pdf, etc.) that will be attached to assets and/or work orders in your FLEETMATE database, will be stored in the *Attachments* folder.

The full path will read: **Z:\Corp_Data\FLEETMATE\Attachments**

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Setting “Fixed Folder” as the Storage Location

Click Company Data | Company Information and Settings..., choose the Forms tab, select the Fixed Folder option, and then click OK. The Forms tab with this setting is pictured below.



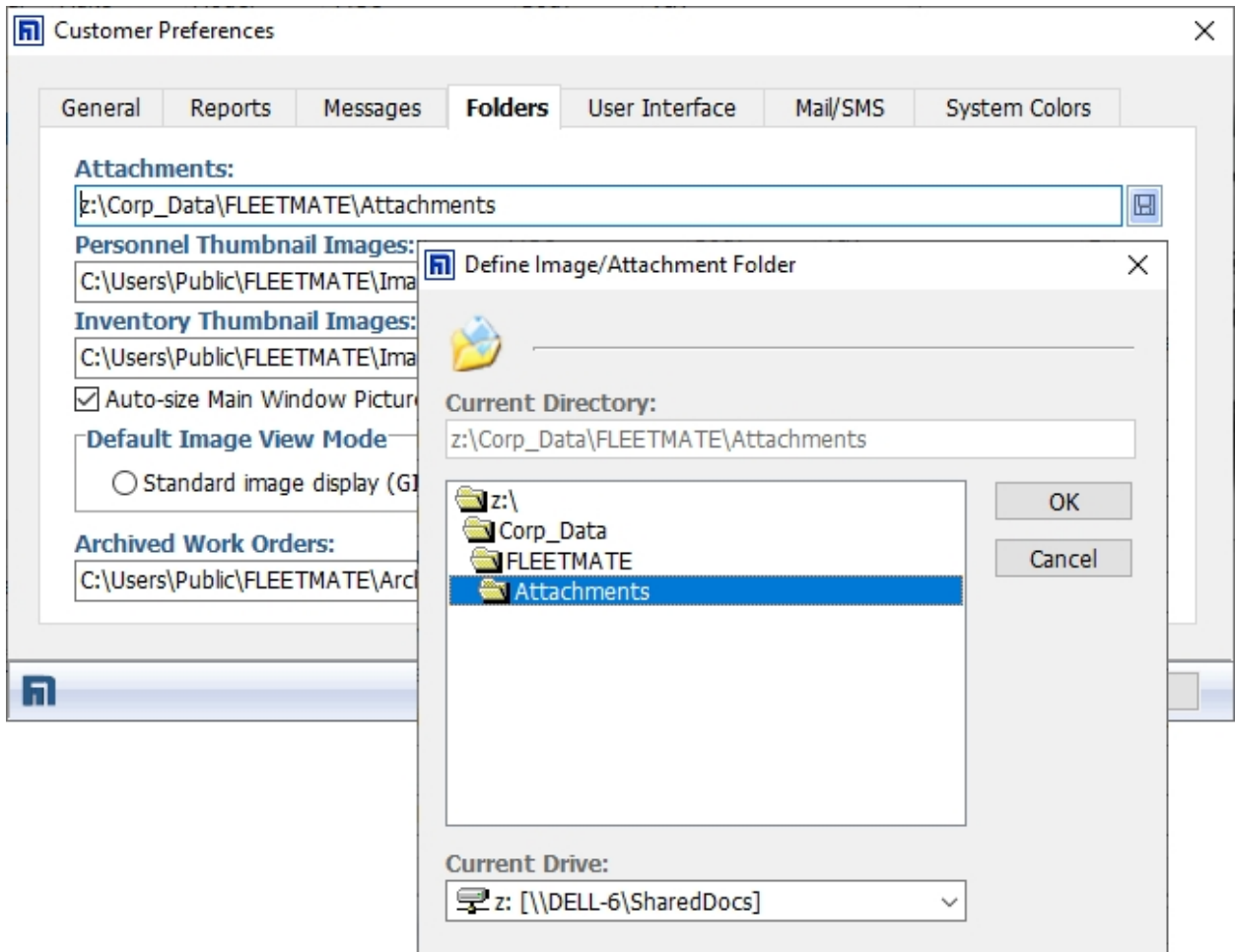
Setting Fixed Folder as the Default

This will make *Fixed Folder* as the default Attachment File Location setting whenever a user adds an attachment to an asset or to a work order. This is a global database setting.


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Customer Preferences Setting – Attachment Folder

Lastly, each user will need to click Options | Preferences..., then choose the Folders tab.



Setting the Attachments Folder for Each User

Click the blue Browse  button to set the Attachments path to the location where your externally stored attachment content is located. This is illustrated in the picture above.

This setting will be remembered between sessions for each user.

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Attachment File Naming Conventions

Since all attachments will be stored in one (1) folder, and you may be working with many thousands of attached files, it is *recommended* that you develop a simple file naming convention so that you can more easily locate and select the attachment that you need.

One example of using a four (4) character prefix followed by a specific identifier is as follows:

- ❖ Attachment filenames beginning with “**AS**” are related to **Assets**
 - **ASV – Vehicles**
 - **ASVP – Vehicle Photos**
 - **ASVD – Vehicle Documents** (*manuals, registration, etc.*)
 - Followed by the VIN
 - **ASE – Equipment**
 - **ASEP – Equipment Photos**
 - **ASED – Equipment Documents** (*manuals, specs, title, etc.*)
 - Followed by the Serial Number

Example: ASVD_1FTMF1EM7DKF88888_OM = 2013 FORD F-150 Owner’s Manual

Example: ASVD_1FTMF1EM7DKF88888_TITLE = 2013 FORD F-150 Title

- ❖ Attachment filenames beginning with “**WO**” are related to **Work Orders**
 - **WOP – Photos** (*parts, repairs, damage, condition, etc.*)
 - **WOD – Documents** (*drawings, sublet receipts, etc.*)
 - **WOI – Inspection Form**
 - Followed by the Work Order Number

Example: WOD_FM-100001_SUBLET = Order No FM-100001 Sublet Receipt

Example: WOP_FM-100002_PHOTO = Order No FM-100002 Collision Photo

This is only one example of how to develop an attachment file naming convention. You could use a system that is more specific. You may find that a different approach works better for your organization.