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### CUSTOMER GUIDE: Administrator's Guide

#### Overview

The Enterprise Edition of FLEETMATE uses Microsoft® SQL Server 2005 (*or later*) for data storage. You will need to have SQL Server available on your network and you will need access to SQL Server Management Studio in order to setup your database(s).

**If you are upgrading your existing installation, please proceed directly to page 16 for upgrade instructions.**

The basic steps involved in installing FLEETMATE Enterprise Edition and preparing it for initial use are as follows:

1. Download and Install FLEETMATE Enterprise Edition on Your PC
2. Create Your SQL Server Database  
*Contact your IT Support group or Database Administrator if you need assistance.*
3. Migrate Your Existing FLEETMATE Office Edition Database (*Optional*)  
*This is only necessary if you were running a prior version of FLEETMATE and you need to migrate your prior data.*
  - a. Download/Install the latest release of FLEETMATE Standard Edition
  - b. Run a Database Repair  
*This will reorganize your existing FLEETMATE Office database in preparation for the data migration below.*
  - c. Run the Migration Utility  
*This will migrate the data in your prior Standard Edition FLEETMATE Office database to your new Enterprise Edition database.*
4. Begin Using FLEETMATE Enterprise Edition
  - a. View the Instructional Videos at [www.fleetmate.com](http://www.fleetmate.com)
  - b. Review the Customer Guides at [www.fleetmate.com](http://www.fleetmate.com)

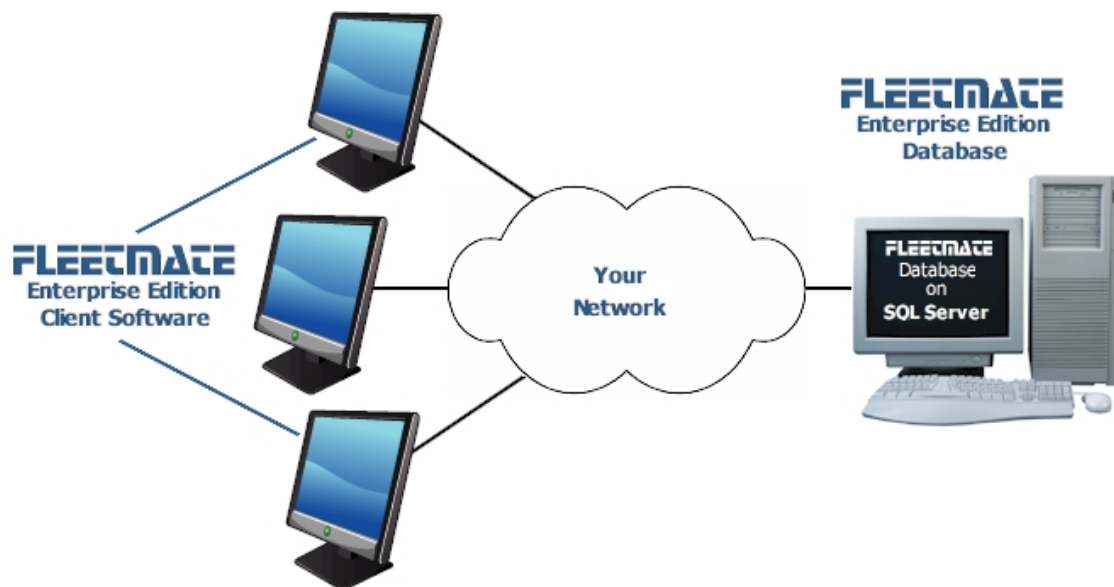
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### CUSTOMER GUIDE: Administrator's Guide

#### FLEETMATE Network Installation - Basics

FLEETMATE Enterprise will perform best with a 100 Mbps (*or faster*) hardwired network connection to the database server. For use at remote offices, we recommend using a product such as Windows Terminal Server, Citrix®, or GoToMyPC® for remote desktop connectivity.

If you need multiple users to access shared fleet information, you'll need to install FLEETMATE Enterprise on each PC at which the software will be used using the `fmeesetup.exe` installation program. Your database resides separately on Microsoft SQL Server.



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Basic Network Configuration Diagram

Each user will need to use the File | Database | Open... menu function one time to select the Enterprise Edition database to use. Afterwards, FLEETMATE Enterprise will automatically re-open the last used database between sessions.

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### CUSTOMER GUIDE: Administrator's Guide

#### Creating your FLEETMATE Enterprise Edition Database

A database creation script is included that will make it easy for you to create your initial FLEETMATE Enterprise Edition database on SQL Server. You will need to run the script on a PC or server where SQL Server Management Studio is installed.

The C:\Program Files (x86)\FLEETMATE Enterprise\Database\Scripts folder contains the script named Create\_FLEETMATE.sql .

To create your Production database, double-click on the Create\_FLEETMATE.sql script file. Once you login to SQL Server Management Studio, the creation script should appear in a query pane. The default DB name is FLEETMATE", which can be changed if necessary. If you do this, perform a global replace on the term FLEETMATE so that all instances of the term FLEETMATE are also changed.

You will need to edit the path settings to match your SQL Server version and installation. Be sure to do this for both the DB file and the Log file. When ready, click the Execute button to run the script. This will create your production database.

At this point you can opt to copy your new FLEETMATE database to serve as a test database.

**NOTE:** The database creation script is not required on a user's PC file system. This file is provided for DBA use only, and may be removed.

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### CUSTOMER GUIDE: Administrator's Guide

#### FLEETMATE User Access

Using Windows Integrated Security for access to the FLEETMATE Enterprise database is the default and *recommended* method of authentication.

If IT policies at your company requires separate logins to SQL Server, you may certainly setup user accounts within your FLEETMATE database, and setup your database for mixed-mode authentication. However, this approach is not recommended due to security concerns. It will also require edits to the connection string value in the PC registry. Contact us for additional details.

Functions within FLEETMATE will perform the following common SQL actions:

- INSERT
- UPDATE
- DELETE
- EXECUTE

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**CUSTOMER GUIDE: Administrator's Guide**

## Create Your SQL Server Logins

- **Create the Login**

Using SQL Server Management Studio, create the login. This will typically be a domain user account. Set the default database. Select Windows Authentication.
- **User Mapping**

Select the database(s) you intend to grant this user access to. The Database Role Membership should include:

  - **db\_datareader**
  - **db\_datawriter**
- **Status**

Make certain that the permission to connect is granted, and that the login is enabled.

### CUSTOMER GUIDE: Administrator's Guide

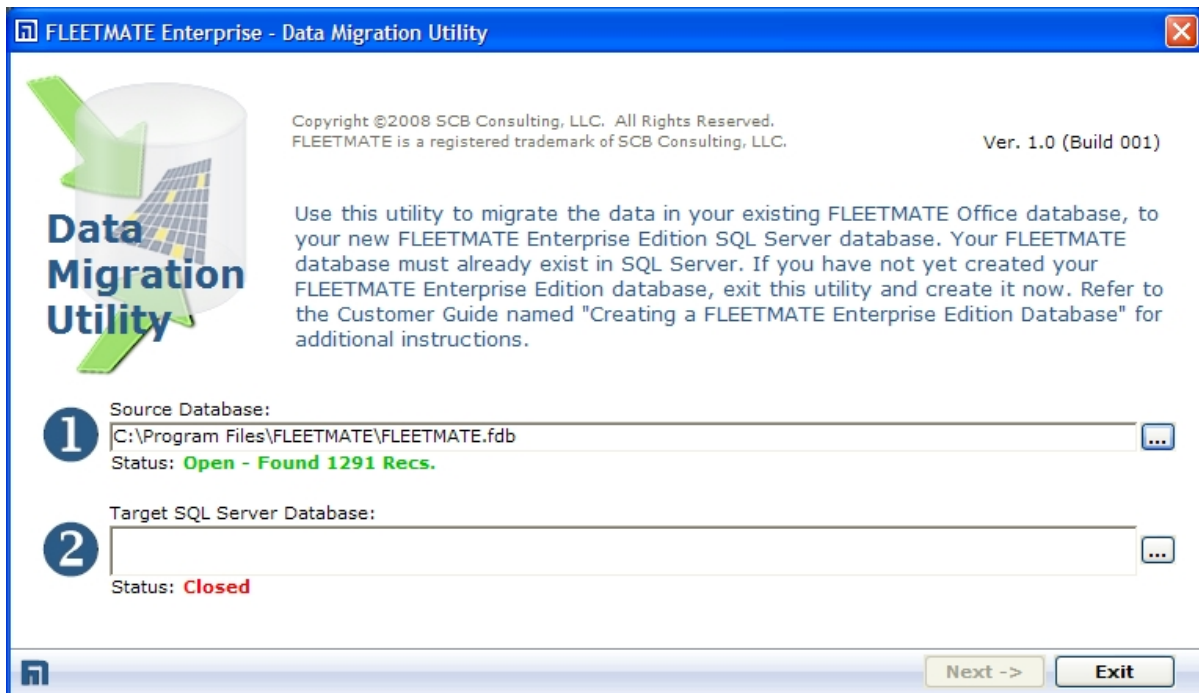
## Migrating Your Existing FLEETMATE Database

If you had previously used FLEETMATE Standard Edition, you can migrate your existing Standard Edition data to your new FLEETMATE Enterprise Edition database. It is recommended that you seek assistance from Database Administrator as you proceed through this process.

To prepare for migrating your prior data, start your *prior* FLEETMATE software and run a Database Repair (File | Database | Utilities | Repair...). This will help ensure that your database is organized properly.

The migration process requires that all existing Work Order Numbers be unique. There also cannot be any missing work order numbers. You may wish to review your current data prior to attempting a migration.

In the C:\Program Files(x86)\FLEETMATE Enterprise folder on your PC, you will find the Data Migration Utility. Double-click on the FMEEMIG.exe file to start the software. Your screen should resemble the picture below.

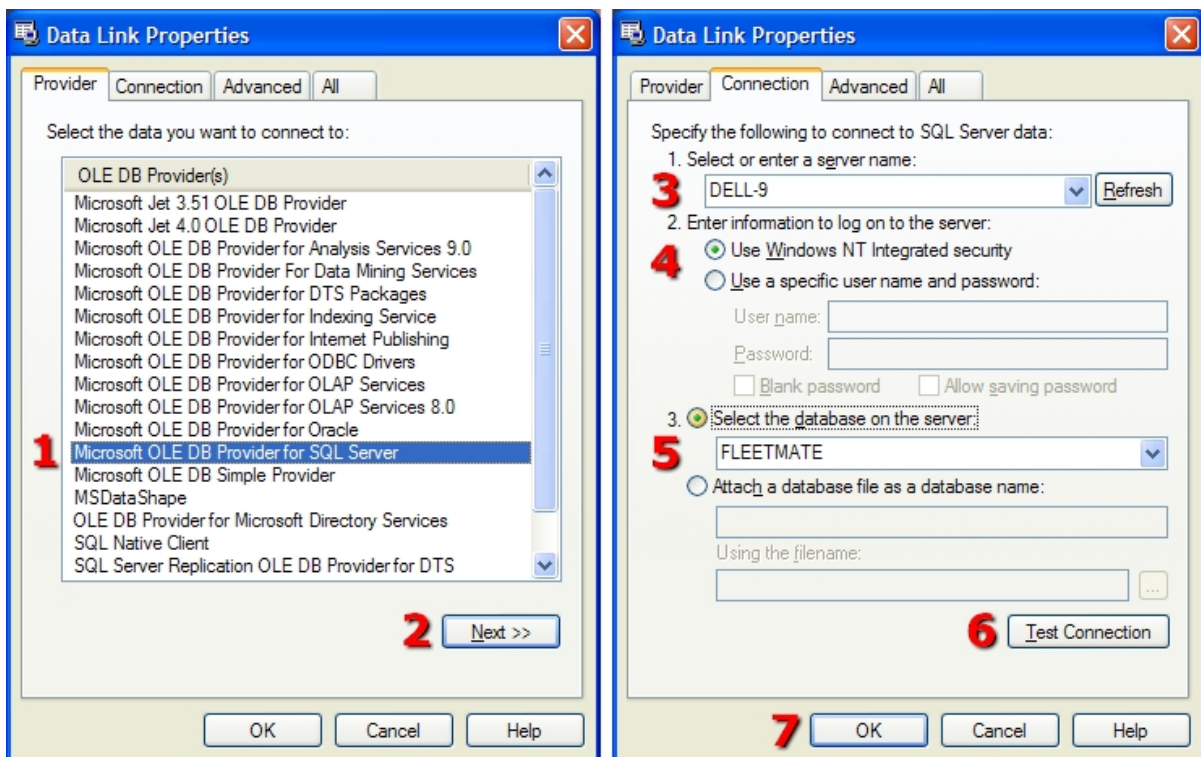


Data Migration Utility – Initial Window – Steps One and Two

### CUSTOMER GUIDE: Administrator's Guide

#### Migrating Your Existing FLEETMATE Database

- 1** The first step is to click the **Browse** button (on the right) to locate and select your prior FLEETMATE database file. This is the **Source** database. If any errors are reported when you select your prior database, you will need to correct those issues before continuing.
- 2** The next step is to select the **Target** FLEETMATE Enterprise Edition SQL Server database that you want to migrate your prior data into. To do this, click the **Browse** button. This will open the standard Windows Data Link Properties dialog, as pictured below.



Windows Data Link Properties Dialog

The steps required are numbered in red. Simply progress through these steps to select the Target FLEETMATE Enterprise Edition database.

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**CUSTOMER GUIDE: Administrator's Guide****Migrating Your Existing FLEETMATE Database****Data Link Properties Dialog – Steps**

1. Select the OLE DB Provider  
Choose Microsoft OLE DB Provider for SQL Server
2. Click [Next >>]
3. Select the Server  
This is the server where your database resides. Contact your Database Administrator if you do not know the server name.
4. Select the login method  
Integrated Security (first option) is the recommended method. Your Database Administrator may have configured your system differently, so contact your administrator for additional information.
5. Select your Database  
The default name for your Production database will be FLEETMATE. The default name for your Test database will be FLEETMATE\_TEST. Your Database Administrator may have configured your system differently, so contact your administrator if you need assistance.
6. Click [Test Connection]  
This will verify your connection. If the test fails, you will need to contact your administrator for additional information and/or assistance.
7. Click [OK].  
You will return to the initial window in the Data Migration Utility. Your SQL Server connection specifications should appear in the box labeled Target SQL Server Database. If any errors appear, stop and contact your Database Administrator or IT Support personnel for assistance.

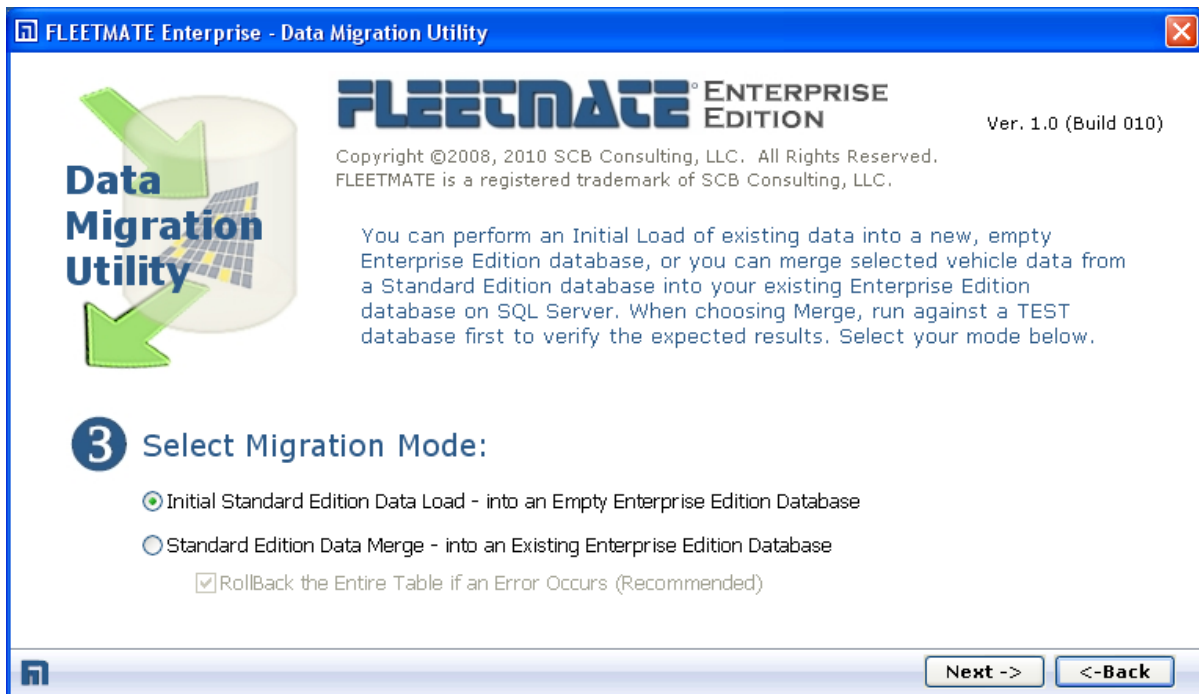
After making these settings you will be returned to the initial Window. Click [Next ->] to continue to the third step.



### CUSTOMER GUIDE: Administrator's Guide

## Migrating Your Existing FLEETMATE Database

Once you click [Next ->] on the initial window, step #3 will appear. Your screen will resemble the picture below.



Data Migration Utility – Step Number Three (3)

In step #3 you will choose the Migration Mode.

The first option should be chosen if you simply need to migrate a single Standard Edition database file into your new, *empty* Enterprise Edition database on SQL Server.

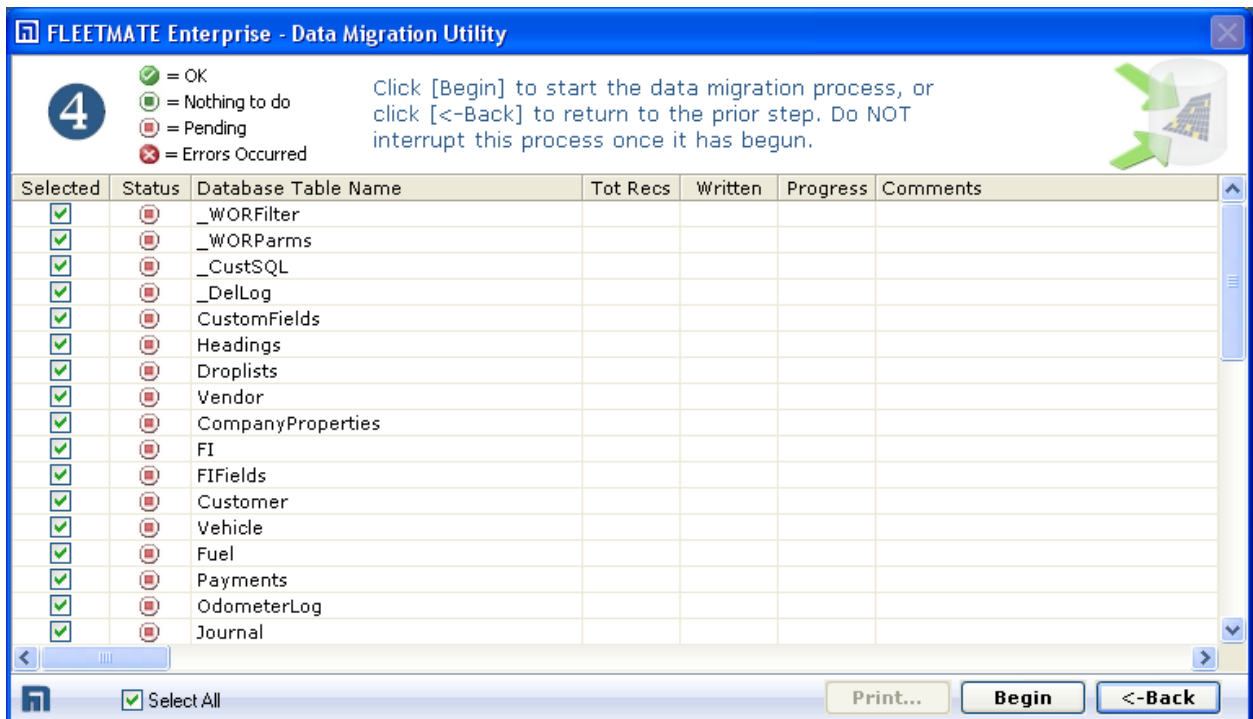
In the event your SQL Server database already contains data, and you need to *migrate* additional Standard Edition data from a different database file, use the second option. The second option will merge additional Standard Edition data into your existing SQL Server database.

Click [Next ->] to continue.

### CUSTOMER GUIDE: Administrator's Guide

#### Migrating Your Existing FLEETMATE Database

Once you click [Next ->], step #4 will appear. Your screen will resemble the picture below.



This window lists all tables that will be migrated, and gives you the ability to skip the migration of specific tables. Migrating all tables is recommended; however, if you have a specific need to skip migrating certain data tables, this window gives you the opportunity to do so.

**IMPORTANT** – Do NOT migrate the same data more than once. This can result in duplication of data.

To begin the data migration process, click the [Begin] button.

The migration process will take anywhere from a few minutes, to an hour or more to run. The time required depends upon the volume of data in your original database. Make sure you have adequate time to devote to this process before beginning. A percentage indicator will be displayed for each table, to indicate the progress of that data table.

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### CUSTOMER GUIDE: Administrator's Guide





## Migrating Your Existing FLEETMATE Database

**DO NOT interrupt the migration process once it has begun.**

If any errors occur during migration, these errors must be investigated to determine the cause, and to assess whether the errors were critical.

If an error occurs while a table is being processed, all records written will be rolled-back. This means that if you have 100 vehicle records and an error occurs on vehicle record number one hundred (100), none of the vehicle records will be migrated. This is by design to give you an opportunity to cleanly re-migrate the single table once the issue is identified and corrected.

Icons are used on this window to indicate table migration status as follows:

-  OK – table was migrated successfully with no errors.
-  OK – nothing was done, usually because there were no source records to migrate.
-  Pending – the table has not yet been processed.
-  Error – an error occurred during processing. This condition must be investigated and corrected before attempting to re-migrate the table.

Once the migration process completes you can print a listing of the tables with status information by clicking the [Print...] button.

Otherwise, click the [Close] button to return to the initial window, and then click [Exit] to close the Data Migration Utility.

If errors occur during migration, or if bad/incorrect data was migrated, it is often easiest to delete the database using SQL Server Management Studio, correct the source problem, re-run the creation script, and start the migration process once again.

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### CUSTOMER GUIDE: Administrator's Guide

#### Common Data Migration Difficulties

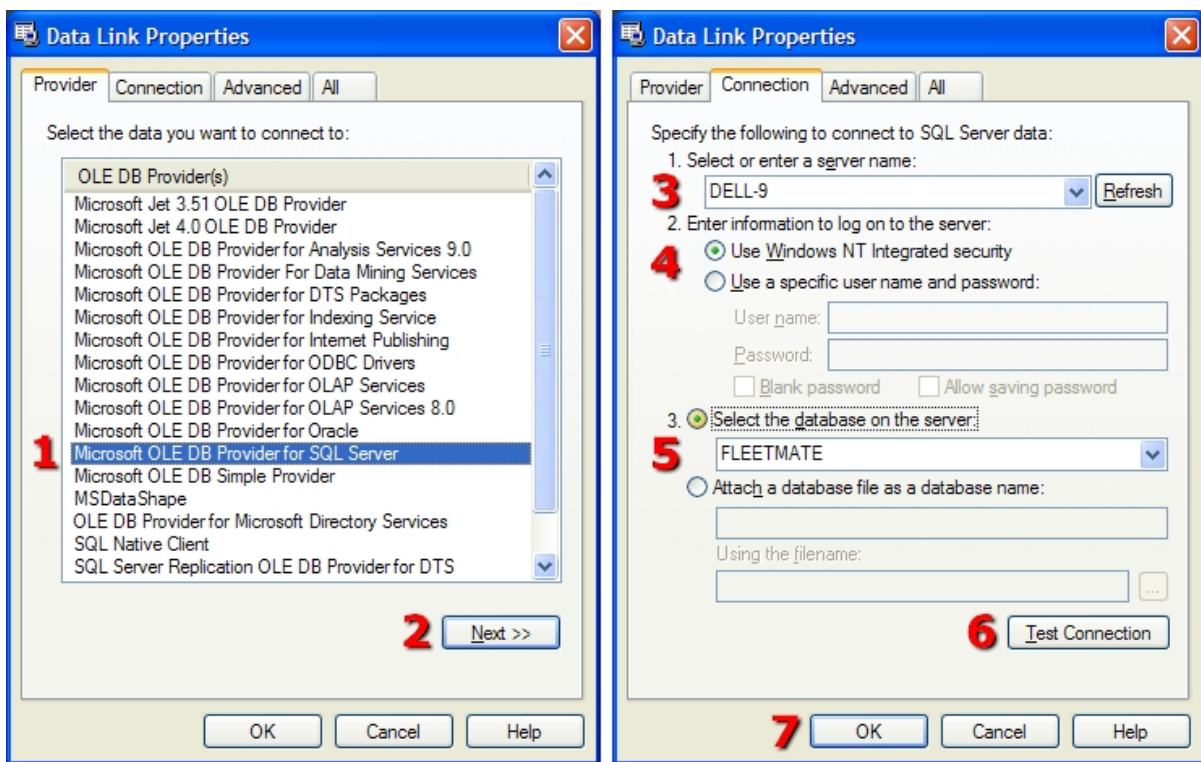
If you encounter errors when migrating a FLEETMATE Standard Edition database into your Enterprise Edition database, the following list identifies some common root causes for those errors.

- **A Database REPAIR is needed**  
Prior to attempting to migrate a Standard Edition database, start the Standard Edition and run a repair (File | Database | Utilities | Repair...). This will compress the database, and solve some of the inconsistencies that can occur over time.
- **NULL or Missing Order Numbers**  
Every work order record must have a *unique* work order number assigned.
- **Duplicate Work Order Numbers**  
Every work order in FLEETMATE Enterprise requires a *unique* order number. You will need to verify that unique order numbers exist in the source database. For help locating duplicate work order numbers, please refer to the Support page on the FLEETMATE Website. There is a support article that will provide a SQL statement to locate this information for you.
- **Invalid Date Values**  
It is possible that one or more date fields contain invalid value(s). This can occur if a power or network interruption occurred while a record update was in progress. There is also the possibility of data entry errors. Check your source database for invalid dates. A 'cast' error is almost always caused by a bad date value.

### CUSTOMER GUIDE: Administrator's Guide

#### FLEETMATE Initial Startup

When you initially start FLEETMATE Enterprise Edition, you will need to specify the database you wish to use. This process is done via the standard windows Data Link Properties dialog, pictured below.



Opening a FLEETMATE Enterprise Edition Database

The steps required are numbered above in red. Simply progress through these steps to select the FLEETMATE Enterprise Edition database you wish to open. These steps are covered in more detail on the next page.

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**CUSTOMER GUIDE: Administrator's Guide****Data Link Properties Dialog – Steps**

1. Select the Provider  
Choose **Microsoft OLE DB Provider for SQL Server**
2. Click [Next >>]
3. Select the Server  
This is the server where your database resides. Contact your Database Administrator if you do not know the server name.
4. Select the login method  
Integrated Security (first option) is the default method. Your Database Administrator may have configured your system differently, so you may need to contact your administrator for additional information.
5. Select your Database  
The default database name will be FLEETMATE. Your Database Administrator may have configured your system differently, so you may need to contact your administrator for additional information.
6. Click [Test Connection]  
This will verify your connection. If the test fails, you will need to contact your administrator for additional information and/or assistance.
7. Click [OK].  
This will open your selected database.

If any errors appear, stop and contact your Database Administrator or IT Support personnel for assistance.

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### CUSTOMER GUIDE: Administrator's Guide

#### FLEETMATE Tips Database

The tips that appear within FLEETMATE are stored in a Microsoft® Access database. The database filename is `fmeTips.mdb`. This database contains a single table named `Tips`. You can customize the contents of this database table so that the information presented is relevant to your business. This can be useful for presenting certain business procedures and/or rules. You will need Microsoft® Access 2000 in order to edit the records in the `Tips` table. When making edits, you will need to keep the record numbering consecutive. In other words, if you delete a record, you will need to adjust all record numbers that follow.

When making edits, limit your `Tips` records to approximately 600 characters, or roughly 12 lines of 50 characters each. The `Tips` dialog cannot be resized; therefore, test the results to be sure that the text fits within the physical limits of the dialog.

As a default, FLEETMATE will look for the tips database file in the installation folder, normally `C:\Program Files\FLEETMATE_Enterprise`. You can locate the `Tips` database file in an alternate path. To do this, you will need to specify an alternate `ConnectionString` in the PC registry. The registry value is located at:

```
HKEY_CURRENT_USER\Software\SCB\FLEETMATE Enterprise\General\sTipsConnStr
```

The value data consists of the `ConnectionString`. The default `ConnectionString` is listed below. This is a single line of text, but has been broken into three lines for readability.

```
Provider=Microsoft.Jet.OLEDB.4.0;  
Data Source=C:\Program Files\FLEETMATE_Enterprise\fmeTips.mdb;  
Persist Security Info=False
```

To specify an alternate path, you will edit the `Data Source` parameter. As an example, if you have placed a customized `Tips` database on a network server at `G:\FLEETMATE\fmeTips.mdb`, the `data Source` parameter will be specified as follows:

```
Data Source=G:\FLEETMATE\fmeTips.mdb;
```

When customizing the `ConnectionString`, keep in mind that this is a single line of text. The semicolons separating the parameters must be preserved.

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### CUSTOMER GUIDE: Administrator's Guide

## Upgrading an Existing Installation

If this is a new installation, your database will already be up to date. You may skip this section.

If you have a prior version of FLEETMATE Enterprise installed, there may be additional steps to perform prior to starting FLEETMATE. Please follow the steps below using Microsoft SQL Server Management Studio:

- 1 Note Your Current Version and Build Number**  
To do this, start FLEETMATE Enterprise and click "Help | About..." Make a note of your current Version and Build numbers, then close FLEETMATE..
- 2 Download and Install**  
Download the latest release of FLEETMATE Enterprise from the FLEETMATE Website and run the installer.
- 3 Run Database ALTER Scripts**  
The C:\Program Files (x86)\FLEETMATE\_Enterprise\Database\Scripts folder will contain one or more scripts beginning with the word "Alter." These small scripts contain database updates to bring your existing SQL Server database up to date with the latest build. Not every release contains an alter script. Some are skipped, i.e. there is no alter script for build #34.

Each alter script has the version and build numbers as a part of the filename. Alter scripts must be run in consecutive order, beginning with the script that follows your current build number. As an example, if you have build #33, Alter\_FLEETMATE\_11035.sql will bring your database up to date with version 1.1 build 035.

Alter\_FLEETMATE\_11036.sql will bring your database up to date with version 1.1 build 036, and so on. Run each script in order, using SQL Server Management Studio.

Once you update your SQL Server database, you can then start the latest version of FLEETMATE Enterprise, and continue routine use of the software.

If you need assistance, please write to us at [support@fleetmate.com](mailto:support@fleetmate.com) or call us at **410-282-3603** (weekdays, 9 AM to 5 PM EDT) if you need help. We will be glad to assist you.