

Version 25



Trapeze

Enterprise Asset Management

Approvals

Administrator Guide

Trade Secret | February 2025

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Technical Support

Trapeze provides several ways to connect with the Customer Care team. Please provide detailed information to the representative. If you are reporting an issue by e-mail, include any error messages, screen shots of your problem, and steps to replicate the issue.

Customer Care is available Monday through Friday, 8:00 a.m. to 8:00 p.m., Eastern Standard Time.

Toll-Free Telephone: 1-877-411-8727

E-mail: cc@trapezegroup.com

FTP Site: <https://ftps.trapezegroup.com/>

Web Site: <https://collaborate.trapezegroup.com>

The website provides access to Trapeze Collaborate which offers resources to implement and operate the software, search knowledge, participate in communities, log/track service requests, sign-up for release alerts, view product health recommendations, and download updates or documentation. For secure access to Collaborate, contact Customer Care through the website or by calling the number above.

Product Compatibility

Refer to the latest [Product Compatibility](#) information on Trapeze Collaborate for requirements including operating system information, databases, Crystal reports, network protocol, HTTP servers and browsers that are supported.

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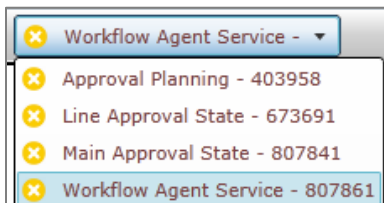
1. Overview

This module is designed for users who want to have a hierarchical approval workflow for various items. The approvals process allows you to set approvals for items such as service requests, purchase orders, etc. This module will then send notifications or emails to configured users based on templates that allow items, such as work orders or service requests, to only be approved when the appropriate people have approved first. For example, a client wants purchase orders to only be approved once the building manager and shift supervisor have approved the purchase order.

2. Approval Setup

The following describes how users can set up and use the approval process functionality.

1. Install the MAXQueue Approval package which installs four separate services: Approval Planning, Line Approval State, Main Approval State, and Workflow Agent State.



2. In the MAXQueue Designer, set the following global variables:
 - **vars.FAUser:** Can be any user that has access to the system
 - **vars.FAPassword:** Password for the above user
 - **vars.FAUrl:** Input FASuite URL minus the "/FASuiteInfoCenter.aspx"
 - **vars.ODBCName:** The ODBC name used for database connection
 - **vars.ODBCUser:** the ODBC user name for database connection
 - **vars.ODBCPassword:** The ODBC password for database connection
 - **vars.UseHtmlForNotification:** Accepts values **Y** or **N**. If set to **Y**, it will wrap the notification in the HTML template that is specified in **vars.HtmlTemplate**.
 - **vars.HtmlTemplate:** if **vars.UseHtmlForNotification** is **Y**, then this is the name of the HTML template found in the directory HTML/HTMLTemplate. If this **vars.HtmlTemplate** is left blank, it defaults to HTMLEmail.html.

Instance Configuration

☐ Requires Review

Description:

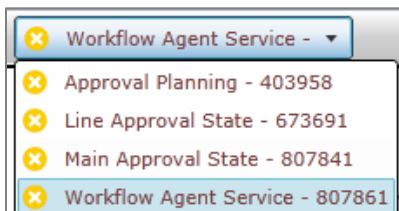
Instance Variables:

Variable	Value	Encrypt	Description
vars.FAUser	MAXQ		
vars.FAPassword	MAXQ		
vars.AppUser	MAXQ		
vars.FAUrl	http://server/instance		
vars.ODBCName	emdsdba		ODBC Name for db connecti
vars.ODBCUser	emdsdba		ODBC UserName for db con
vars.ODBCPassword	emdsdba		ODBC Password for db conn
vars.UseHtmlForApproval...	Y		
vars.HtmlTemplateForApp...			

Service Variables:

Variable	Value	Encrypt	Description

3. Enable the four new services.



4. Navigate to Setup>Shop Activity>Action Type.
5. Create a new Action Type ID.
 - i. Add Description.
 - ii. Set the **Library Name** (for example, MAXQueue.Approvals.WorkOrder). The actual library name will depend on which notification type you are using.
 - iii. Set the **Library Object** (for example, MAXQueue.Approvals.WorkOrder).
 - iv. Select an Action of Approval.
 - v. Select an Action of Notify.
6. Navigate to Setup>Shop Activity>Notification Template.
7. Create a new Template ID.

- i. Add Description.
- ii. Check the **Active** box.
- iii. Set **Reminder Frequency**. This is the time interval between reminders. It can be set at days, hours, or minutes.
- iv. Set **Maximum Number of Reminders**. This determines the maximum number of reminders you will get with a notification.
- v. Set **Order**. The order is the sequence in which approvals must occur. The order of the first notification template group row must be set to 1. Levels can be overlapped, and it only takes one approval to move to the next level.
- vi. Select **Action Type ID**. Select the Approval or Notify action that you selected when creating a new Action Type ID (Step 5).
- vii. Select **Employee ID** or **Department ID**. Select the employee or department who will need to approve or who you would like to notify. If Department ID is entered, the responsible employee for that department will receive the notifications.
 - Either Employee ID or Department ID must be specified, but the user may not enter both of these IDs.
- viii. Set **Automatic Approval Threshold**. This is where a threshold limit for automatic cost approval can be set. If the threshold amount is greater than the cost of the order, the item will get an automatic approval.
- ix. Review **Functions** tab. This tab has a list of items on which notifications can be used.
 -  Each Notification Template record can only have one function assigned so there are no issues with assigning users with the correct actions for a certain functional area.

3. Approval Process Workflow

When a user starts a workflow, an auto-generated notification instance is created, which can be viewed on the notification screen. This screen tracks the actions of the employees based on the template. The general approval workflow is as follows:

1. Create a work order.
2. Select a notification that you created.
3. Click **Save**.

The notification is sent to the first level of approval.



It may take a few minutes for the notification to go through.

4. The approver selects the notification, and clicks the approval link.
5. The approver then approves or denies the work order.

Once approved, the system automatically sends a notification to the next level.

When the work order has been approved by all levels, the system sets the Notification Status to Completed.

If an employee approves for a given level the status will be updated on the notification instance screen for that employee. The header status will be updated to **In Progress** when the user first starts the workflow, **Completed** if the workflow was approved at every level, **Cancelled** if the workflow is denied at any level, and **Stopped** if an employee manually stops the workflow by going to the notification instance screen and manually setting the status to stopped. Regardless of what the status is set to, the user who started the workflow will receive a notification of the final status.

Different approval types have specific functionality and workflows. See the following sections for additional information about the various approval types.

4. Approval Types

For any approvals, refer to the help page on the screen for more information about the fields available.

Assignment Request

Use the Assignment Request screen to start the approval workflow for an assignment request. This sets up the hierarchy for approving any assignment requests for new items, or any issues that users have reported with an item they currently have.

Action Types

- Set action types as described for general approval workflow process.
- Set the library name field to **MAXQueue.Approvals.Assignment**.
- Set the library object field to **MAXQueue.Approvals.Assignment**.

Workflow Notes

- Go to the Assignment Request screen and set the Notification Template field to the ID that is designed for this workflow.
- The status will change to **In Progress** and the employees at the first level will receive a notification for either approving or denying the assignment request or just a notification that the assignment request has been created.
- The notifications all contain a link to assignment request so that if the user clicks it the assignment request will open up in Enterprise Portal. **Please click here** will only show for notifications where there is an action of **Approval**.
- The user will not be able to deny without inserting a comment. If the assignment request is denied, it will be cancelled and a notification will be sent to the employee who started the workflow. If the employee approves, then the workflow will repeat all steps listed above. If the employee does not respond to the notification within the set reminder frequency, they will receive a reminder notification. If the maximum reminders threshold is breached, the workflow will timeout, the status will be set to **Cancelled**, and a notification will be sent to the user who started the workflow. If the workflow reaches the last level and is approved at all levels, the change request will be approved and the notification instance status will be set to **Completed** and the user who started the workflow will receive a notification that the workflow has been completed.
- At any time during the workflow a user has the ability to stop or cancel the workflow which will result in the notification instance status being updated accordingly and the employee who started the workflow being notified of the status.



This workflow ignores thresholds considering that change requests do not have a total cost associated with them.

Bid Quote Proposals- Requests

Use the Requests for Bid Quotes Proposal screen to start the approval workflow for BQP requests. This sets up the hierarchy for approving any bid/quote/proposal requests before they are sent out to vendors.

Action Types

- Set action types as described for general approval workflow process.
- Set the library name field to **MAXQueue.Approvals.BidQuoteProposal**.
- Set the library object field to **MAXQueue.Approvals.BidQuoteProposal**.

Workflow Notes

- Go to the Requests for Bid Quotes Proposal screen and set the Notification Template field to the ID that is designed for this workflow.
- The status will change to **In Progress** and the employees at the first level will receive a notification for either approving or denying the request for bid quote proposal or just a notification that the request for bid quote proposal has been created.
- The notifications all contain a link to the Request for Bid Proposal screen so that if the user clicks it, it will open up in Enterprise Portal. **Please click here** will only show for notifications where there is an action of **Approval**.
- The user will not be able to deny without inserting a comment. If the bid quote proposal request is denied, it will be cancelled and a notification will be sent to the employee who started the workflow. If the employee approves, then the workflow will repeat all steps listed above. If the employee does not respond to the notification within the set reminder frequency, they will receive a reminder notification. If the maximum reminders threshold is breached, the workflow will timeout, the status will be set to **Cancelled**, and a notification will be sent to the user who started the workflow. If the workflow reaches the last level and is approved at all levels, the change request will be approved and the notification instance status will be set to **Completed** and the user who started the workflow will receive a notification that the workflow has been completed.
- At any time during the workflow a user has the ability to stop or cancel the workflow which will result in the notification instance status being updated accordingly and the employee who started the workflow being notified of the status.



Thresholds are calculated by adding up total cost of all lines on the request for bid quote proposal.

Bid Quote Proposals- Responses

Use the Responses for Bid Quotes Proposal screen to start the approval workflow for BQP responses. This sets up the hierarchy for approving any bid/quote/proposal responses from vendors.

Action Types

- Set action types as described for general approval workflow process.
- Set the library name field to **MAXQueue.Approvals.BidQuoteResponse**.
- Set the library object field to **MAXQueue.Approvals.BidQuoteResponse**.

Workflow Notes

- Go to the Responses for Bid Quotes Proposal screen and set the Notification Template field to the ID that is designed for this workflow.
- The status will change to **In Progress** and the employees at the first level will receive a notification for either approving or denying the request for bid quote proposal or just a notification that the request for bid quote proposal has been created.
- The notifications all contain a link to the Response to Bid Proposal screen so that if the user clicks it, it will open up in Enterprise Portal. **Please click here** will only show for notifications where there is an action of **Approval**.
- The user will not be able to deny without inserting a comment. If the bid quote proposal response is denied, it will be cancelled and a notification will be sent to the employee who started the workflow. If the employee approves, then the workflow will repeat all steps listed above. If the employee does not respond to the notification within the set reminder frequency, they will receive a reminder notification. If the maximum reminders threshold is breached, the workflow will timeout, the status will be set to **Cancelled**, and a notification will be sent to the user who started the workflow. If the workflow reaches the last level and is approved at all levels, the change request will be approved and the notification instance status will be set to **Completed** and the user who started the workflow will receive a notification that the workflow has been completed.
- At any time during the workflow a user has the ability to stop or cancel the workflow which will result in the notification instance status being updated accordingly and the employee who started the workflow being notified of the status.



Thresholds are calculated by adding up total cost of all lines on the response for bid quote proposal.

Change Requests

Use the Change Request screen to start the approval workflow for change requests. This sets up the hierarchy for approving any user-requested changes in the system.

Action Types

- Set action types as described for general approval workflow process.
- Set the library name field to **MAXQueue.Approvals.ChangeRequest**.
- Set the library object field to **MAXQueue.Approvals.ChangeRequest**.

Workflow Notes

- Go to the Change Request screen and set the Notification Template field to the ID that is designed for this workflow.
- The status will change to **In Progress** and the employees at the first level will receive a notification for either approving or denying the change request or just a notification that the change request has been created.
- The notifications all contain a link to the Change Request screen so that if the user clicks it, it will open up in Enterprise Portal. **Please click here** will only show for notifications where there is an action of **Approval**.
- The user will not be able to deny without inserting a comment. If the change request is denied, it will be cancelled and a notification will be sent to the employee who started the workflow. If the employee approves, then the workflow will repeat all steps listed above. If the employee does not respond to the notification within the set reminder frequency, they will receive a reminder notification. If the maximum reminders threshold is breached, the workflow will timeout, the status will be set to **Cancelled**, and a notification will be sent to the user who started the workflow. If the workflow reaches the last level and is approved at all levels, the change request will be approved and the notification instance status will be set to **Completed** and the user who started the workflow will receive a notification that the workflow has been completed.
- At any time during the workflow the employee has the ability to stop or cancel a workflow which will result in notification instance status being updated accordingly and employee who started workflow will be notified of the status.



This workflow ignores thresholds considering that change requests do not have a total cost associated with them.

Multi-Asset Work Order

Use the Multi-unit Work Order screen to start the approval workflow process for multi-asset work orders. This sets up the hierarchy for approving any multi-unit work orders for multiple equipment units or their children.

Action Types

- Set action types as described for general approval workflow process.
- Set the library name field to **MAXQueue.Approvals.MultiAssetWorkOrder**.
- Set the library object field to **MAXQueue.Approvals.MultiAssetWorkOrder**.

Workflow Notes

- Go to the Multi-unit Work Order screen and set the Notification Template field to the ID that is designed for this workflow.
- The status will change to **In Progress** and the employees at the first level will receive a notification for either approving or denying the multi-asset work order or just a notification that the multi-asset work order has been created.
- The notifications all contain a link to the Work Order screen so that if the user clicks it, it will open up in Enterprise Portal. **Please click here** will only show for notifications where there is an action of **Approval**.
- The user will not be able to deny without inserting a comment. If the work order is denied, it will be cancelled and a notification will be sent to the employee who started the workflow. If the employee approves, then the workflow will repeat all steps listed above. If the employee does not respond to the notification within the set reminder frequency, they will receive a reminder notification. If the maximum reminders threshold is breached, the workflow will timeout, the status will be set to **Cancelled**, and a notification will be sent to the user who started the workflow. If the workflow reaches the last level and is approved at all levels, the change request will be approved and the notification instance status will be set to **Completed** and the user who started the workflow will receive a notification that the workflow has been completed.
- At any time during the workflow the employee has the ability to stop or cancel a workflow which will result in notification instance status being updated accordingly and employee who started workflow will be notified of the status.



Threshold total cost is calculated by adding up total costs for all child work orders.

Purchase Order

Use the Enterprise Purchasing – Purchases Order screen to start the approval workflow for purchase orders. This sets up the hierarchy for approving any purchase orders that fall under the requirements of the approval process.

Action Types

- Set action types as described for general approval workflow process.
- Set the library name field to **MAXQueue.Approvals.PurchaseOrder**.
- Set the library object field to **MAXQueue.Approvals.PurchaseOrder**.

Workflow Notes

- Go to the Purchase Order screen and set the Notification Template field to the ID that is designed for this workflow.
- The status will change to **In Progress** and the employees at the first level will receive a notification for either approving or denying the purchase order or just a notification that the purchase order has been created.
- The notifications all contain a link to the Purchase Order screen so that if the user clicks it, it will open up in Enterprise Portal. **Please click here** will only show for notifications where there is an action of **Approval**.
- The user will not be able to deny without inserting a comment. If the purchase order is denied, it will be cancelled and a notification will be sent to the employee who started the workflow. If the employee approves, then the workflow will repeat all steps listed above. If the employee does not respond to the notification within the set reminder frequency, they will receive a reminder notification. If the maximum reminders threshold is breached, the workflow will timeout, the status will be set to **Cancelled**, and a notification will be sent to the user who started the workflow. If the workflow reaches the last level and is approved at all levels, the change request will be approved and the notification instance status will be set to **Completed** and the user who started the workflow will receive a notification that the workflow has been completed.
- At any time during the workflow the employee has the ability to stop or cancel a workflow which will result in notification instance status being updated accordingly and employee who started workflow will be notified of the status.



Thresholds are calculated by adding up total cost of all lines on the purchase order.

Requisitions

Use the Enterprise Purchasing – Requisitions screen to start the approval workflow process for requisitions. This sets up the hierarchy for approving any submitted requisitions for a part or a service.

Action Types

- Set action types as described for general approval workflow process.
- Set the library name field to **MAXQueue.Approvals.Requisition**.
- Set the library object field to **MAXQueue.Approvals.Requisition**.

Workflow Notes

- Go to the Requisition screen and set the Notification Template field to the ID that is designed for this workflow.
- The status will change to **In Progress** and the employees at the first level will receive a notification for either approving or denying the requisition or just a notification that the requisition has been created.
- The notifications all contain a link to the Requisition Approval screen so that if the user clicks it, it will open up in Enterprise Portal. **Please click here** will only show for notifications where there is an action of **Approval**.
- The user will not be able to deny without inserting a comment. If the requisition approval is denied, it will be cancelled and a notification will be sent to the employee who started the workflow. If the employee approves, then the workflow will repeat all steps listed above. If the employee does not respond to the notification within the set reminder frequency, they will receive a reminder notification. If the maximum reminders threshold is breached, the workflow will timeout, the status will be set to **Cancelled**, and a notification will be sent to the user who started the workflow. If the workflow reaches the last level and is approved at all levels, the change request will be approved and the notification instance status will be set to **Completed** and the user who started the workflow will receive a notification that the workflow has been completed.
- At any time during the workflow the employee has the ability to stop or cancel a workflow which will result in notification instance status being updated accordingly and employee who started workflow will be notified of the status.



Thresholds are compared to the total cost of all of the lines for the requisition.

Work Order - Approval

Use the Work Order Center screen to start the approval workflow process for work orders. This sets up the hierarchy for approving work orders.

Action Types

- Set action types as described for general approval workflow process.
- Set the library name field to **MAXQueue.Approvals.WorkOrder**.
- Set the library object field to **MAXQueue.Approvals.WorkOrder**.

Workflow Notes

- Go to the Work Order Center screen and set the Notification Template field to the ID that is designed for this workflow.
- The status will change to **In Progress** and the employees at the first level will receive a notification for either approving or denying the work order or just a notification that the work order has been created.
- The notifications all contain a link to the Work Order Center screen so that if the user clicks it, it will open in Enterprise Portal. **Please click here** will only show for notifications where there is an action of **Approval**.
- The user will not be able to deny without inserting a comment. If the work order approval is denied, it will be cancelled, and a notification will be sent to the employee who started the workflow. If the employee approves, then the workflow will repeat all steps listed above. If the employee does not respond to the notification within the set reminder frequency, they will receive a reminder notification. If the maximum reminders threshold is breached, the workflow will timeout, the status will be set to **Cancelled**, and a notification will be sent to the user who started the workflow. If the workflow reaches the last level and is approved at all levels, the change request will be approved, and the notification instance status will be set to **Completed** and the user who started the workflow will receive a notification that the workflow has been completed.
- At any time during the workflow the employee can stop or cancel a workflow which will result in notification instance status being updated accordingly and employee who started workflow will be notified of the status.
- If the **Charges are calculated from details** option is unchecked on the Work Order Planning screen, Summary Cost Info tab, this workflow compares information against the threshold using either the sum of the **Label**, **Parts**, **Commercial**, and **Tool Charges** fields, or the **Total Work Order Charges** field, whichever is higher. If the **Charges are calculated from details** option is checked, the data from the Work Order Summary Cost Info field is used.

Work Order - Planning

Use the Work Order Planning screen to start the approval workflow process for work-order planning. This sets up the hierarchy for approving the planned necessary tasks, labor, parts, commercial services, tools, and equipment required to complete a work order.

Action Types

- Set action types as described for general approval workflow process.
- Set the library name field to **MAXQueue.Approvals.WorkOrderPlanning**.
- Set the library object field to **MAXQueue.Approvals.WorkOrderPlanning**.

Workflow Notes

- Go to the Work Order Planning screen and set the Notification Template field to the ID that is designed for this workflow.
- The status will change to **In Progress** and the employees at the first level will receive a notification for either approving or denying the work order or just a notification that the work order has been created.
- The notifications all contain a link to the Work Order screen so that if the user clicks it, it will open up in Enterprise Portal. **Please click here** will only show for notifications where there is an action of **Approval**.
- The user will not be able to deny without inserting a comment. If the work order plan is denied, it will be cancelled and a notification will be sent to the employee who started the workflow. If the employee approves, then the workflow will repeat all steps listed above. If the employee does not respond to the notification within the set reminder frequency, they will receive a reminder notification. If the maximum reminders threshold is breached, the workflow will timeout, the status will be set to **Cancelled**, and a notification will be sent to the user who started the workflow. If the workflow reaches the last level and is approved at all levels, the change request will be approved and the notification instance status will be set to **Completed** and the user who started the workflow will receive a notification that the workflow has been completed.
- At any time during the workflow the employee has the ability to stop or cancel a workflow which will result in notification instance status being updated accordingly and employee who started workflow will be notified of the status.

Work Projects

The Work Projects approval workflow allows you to set up a workflow for how these projects will be approved. This allows you to set up a hierarchical structure of approvals for work projects. This module will send notifications or emails to the users that are configured, and allows the work project to be approved only when the appropriate users have approved this project.

Action Types

- Set action types as described for general approval workflow process.
- Set the library name field to **MAXQueue.Approvals.WorkProject**.
- Set the library object field to **MAXQueue.Approvals.WorkProject**.

Workflow Notes

- Go to the Work Project screen and set the Notification Template field to the ID that is designed for this workflow.
- The status will change to **In Progress** and the employees at the first level will receive a notification for either approving or denying work project or just a notification that the work project has been created.
- The notifications all contain a link to work project so that if the user clicks it, the work project opens in the Enterprise Portal. The please click here will only show for notifications where there is an action of Approval.
- On this page, the user will not be able to deny the project without inserting a comment.
- The following happens with action (or lack of action) from the user for this workflow:
 - If the employee denies the work project, then the work order is cancelled and a notification is sent to the employee who started the workflow.
 - If the employee approves then the workflow will repeat all steps listed above.
 - If the employee does not respond to the notification within the reminder frequency, they will receive a reminder notification. If the max number of reminders threshold is breached, then the workflow will time out, and status is set to **CANCELLED**. Then, a notification will be sent to user who started workflow.
 - If the workflow reaches the last level and is approved at all levels, the work project is approved and the notification instance status is updated to **COMPLETED**. The user who started the workflow receives a notification that the workflow has been completed.