Version 25 | Trapeze Enterprise Asset Management

Asset Management

Administrator & User Guide

Trade Secret | February 2025

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.

Asset Portal - Administrator and User Guide

Version 25.x

February 2025

Contents

1. Overview

The Asset portal enables asset managers to organize their assets into custom groups based on the criteria that makes sense to each individual manager. Asset managers can also use this portal for a streamlined, template-based creation process to default common fields and attributes when adding new assets into the system. Multiple templates can be configured for any type of asset to allow for a wide range of specialized templates such as creating trees by selecting the species, adding vehicles by selecting year make and model, and so on.

The Asset portal offers the following functions:

- Flexible, gadget-based layout. Each user can define unique views for each location that they manage.
- Custom-named filters to give individual asset managers full control over what defines a specific group of assets
- Location-based organization of saved asset filters
- Asset templates to streamline asset creation, including populating common fields and attributes.
- Integrated search for doing ad hoc asset research, and the ability to save ad hoc searches to reuse later.

Requirements

Application 25.x

Web Modules 25.x

Assumptions

This guide assumes familiarity with workflows and configuration of the application.

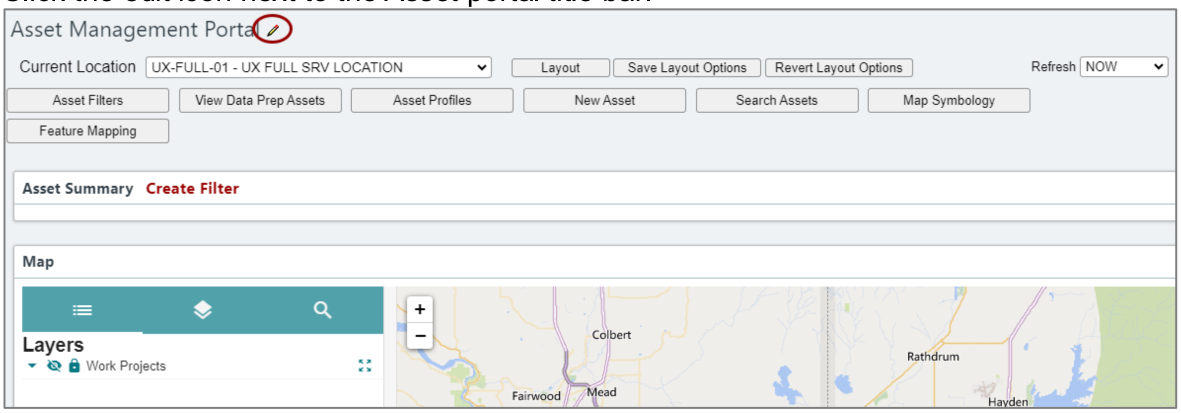
- User defined required fields that do not appear in the Web Modules will return validation messages.
- Special characters cannot be placed into the Web Modules fields or unanticipated results may occur. This would include any character that cannot be typed with a standard keyboard.
- Do not use the browser’s **Back** button in the Web Modules as unanticipated results may occur.
- Do not open or use the same instance of the Web Modules in multiple browser windows or tabs. This can cause errors or unexpected performance issues.

2. Configure the Asset Portal

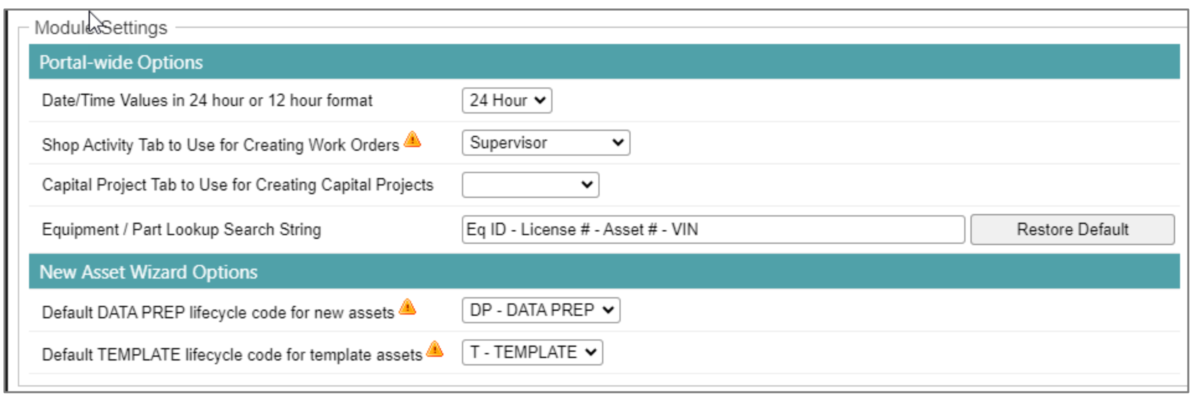
Once you have added the Asset portal tab to Web Modules, log in to Web Modules as an Administrator, and click on the Asset portal tab.

To configure the Asset portal settings:

1. Click the edit icon next to the Asset portal title bar.



The Asset portal Module Settings page displays.



2. Change the settings as needed. Required settings are indicated by the triangle important icon next to the option. The available settings include the following:

   Portal-wide Options

   i. **Date/Time Values in 24 hour or 12 hour format:** Choose between 12 or 24 hour format.

   ii. **Shop Activity Tab to User for Creating Work Orders:** Choose the Shop Activity tab (Supervisor or Work Management) to use as a default for creating work orders. This is also used for creating service requests. This setting is required.

iii. **Equipment/Part Lookup Search String:** Enter the text to display in the search field.

New Asset Wizard Options

i. **Default DATA PREP life cycle code for new assets:** Set the default life cycle code for creating new assets from templates. Create a life cycle code with the classification of DATA PREP for new assets that require checking information after creation.

Note: Life cycle codes are created on the Life Cycle Status Codes screen.

ii. Default TEMPLATE life cycle code for template assets:

3. Click **Location Profiles** to edit location profile settings.

   For more information on setting location profiles, refer to General Application Information, Section 2. Location Settings Profiles.

4. Click **Cancel** to go back to the main page without making changes, or click **Save** to save your changes.

Note: For more information on these settings, refer to the settings sections below.

Portal-wide Options

These are the settings in the Portal-wide Options section of the Module Settings page.

- **Date/Time Values in 24 hour or 12 hour format:** Choose whether to display time values in either 12 or 24 hour format.
- **Service Request Portal tab to use for Creating Service Requests:** Choose a tab to use for creating service requests. This can be useful if you have multiple service request tabs set up for different user groups or needs.
- **Shop Activity Tab to Use for Creating Work Orders:** Choose a tab to use for creating work orders. This can be useful if you have multiple Shop Activity tabs set up for different user groups or needs.
- **Equipment/Part Lookup Search String:** Use this to set the equipment and part lookup string that shows in the Asset Search field.

New Asset Wizard Options

These are the settings in the New Asset Wizard Options section of the Module Settings page.

- **Default DATA PREP lifecycle code for new assets:** Assign this lifecycle status code when creating new assets from templates. This is a required setting. Default is blank.

  Note: For this option, you must create a lifecycle status code with the classification DATA PREP beforehand on the Life Cycle Status Codes screen. For more information, refer to the Data Prep Assets section.

- **Default TEMPLATE lifecycle code for template assets:** Assign this lifecycle status code to templates created on the New Asset page. This is a required setting. Default is blank.

  Note: For this option, you must create a lifecycle status code with the classification TEMPLATE beforehand on the Life Cycle Status Codes screen.

3. Gadgets

There are many gadgets available for setup. Gadgets are customizable tools that provide data based on user defined filters. A gadget is either single-instance or multiple-instance.

Gadget Settings

This section only goes over the admin settings for the following gadgets.

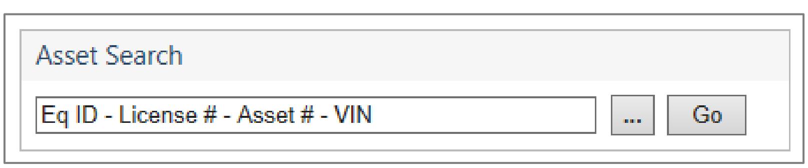
To learn more about customizing your gadget layout and standard gadgets, refer to the *General Application Information* guide.

Available Gadgets

- **Single-instance Gadgets:** gadgets with, at most, one instance per layout (location/user).
  - Asset Search
  - Asset Summary
- **Multiple-instance Gadgets:** gadgets that can have more than one instance per layout (location/user).
  - Metrics
  - URL
  - Ad hoc Query

Single Instance Gadgets

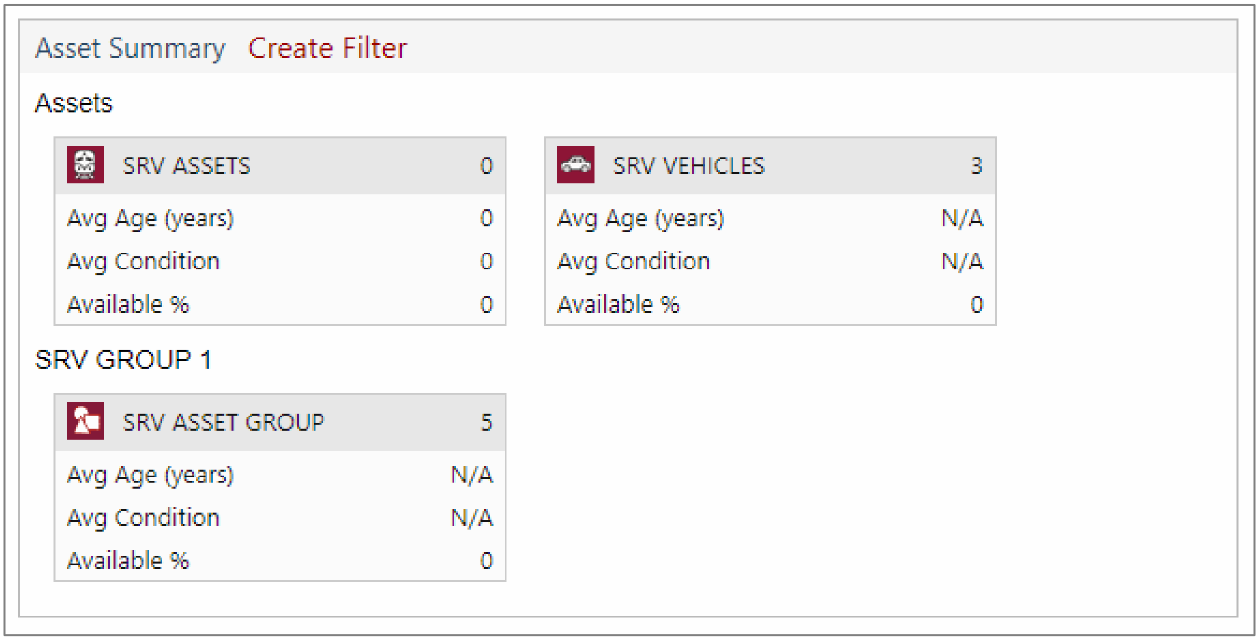
Asset Search



Search assets and view results in the Asset Chooser dialogue (the **Go** button and the chooser button currently both open the chooser). Choosing an asset shows details in the Asset Viewer and allows you to create service requests and work orders for the asset. All assets in the Asset Chooser are the assets available according to your location and user settings. Use this to find a single asset, or to find a group of assets and save it as a filter for later use.

For more information on how to use to Asset Chooser, refer to the *General Application Information Guide*.

Asset Summary



This gadget shows asset filters defined for the current location and user with the following information on each card:

- The symbol for the asset type and the name of the filter.
- The number of assets in the group.
- Average age of the assets.
- Average condition score. If there is no condition score for the asset, that asset is omitted from the average. If no assets have a condition score, **N/A** is displayed.
    - The best way to get accurate average condition scores across all assets is to use the same scale for the score across all assets instead of varying scales such as using a 1-5 scale for some assets and 1-100 for others. This helps maintain a consistent look at the average condition.
- Average available percentage. This is based on the counts of assets where the main status is set as **IN SERVICE**.

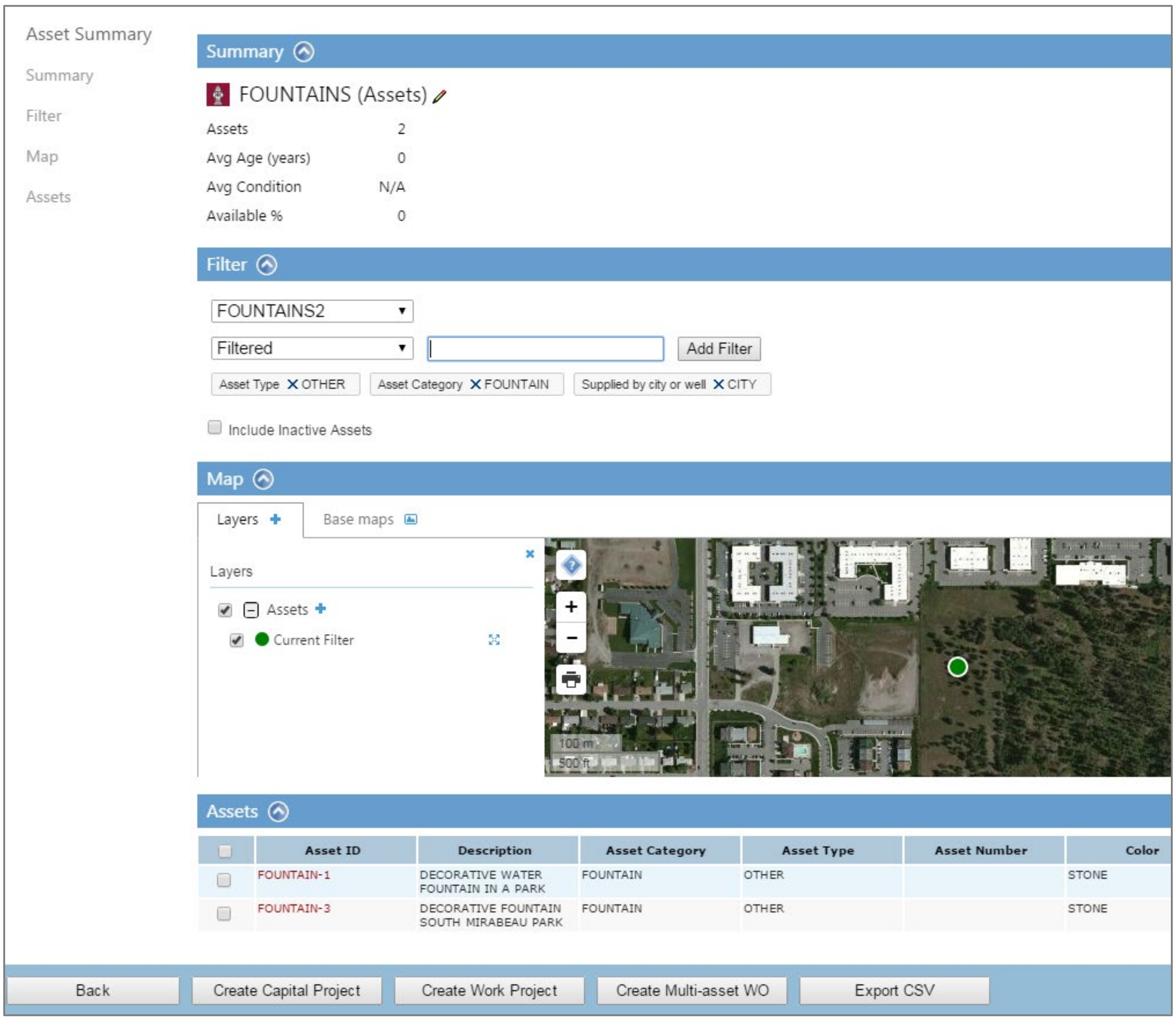
From this asset, you can create new filters, or view the asset summary page of a filter.

- Click the **Create Filter** link to create new filters
- Click a filter group to view the list of assets in the Asset Summary page.

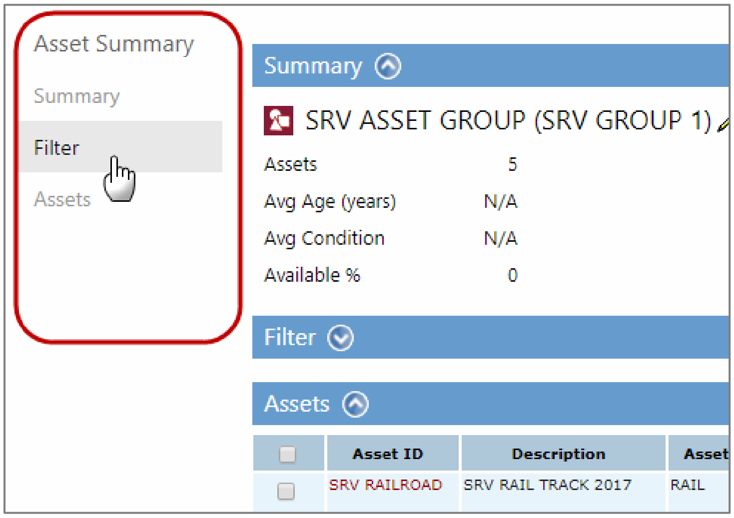
Asset Summary Detail Page

The Asset Summary page displays a full list of assets for the set filter. This page displays the applied filters, summary metrics (the same information on the Asset Summary gadget), and a map for assets that have the option checked to show map.

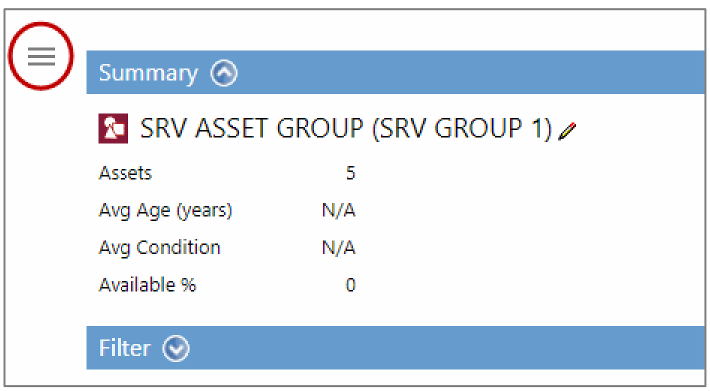
- Click an individual asset from the chooser to open the Asset Viewer, which allows you to create service requests and work orders. For more information, refer to the *General Application Information* guide.
- Click the blue arrow next to the title of each section to expand or collapse the section.



To jump to a section of the details page, click the section name in the left navigation menu.



Note: On devices with smaller screens or resolutions, this navigation menu will display as shown below. Click the menu button to expand the menu.



Summary

The Summary section displays the filter name and its icon, along with the filter group name in parentheses. This section displays the same metrics as on the main Asset Summary gadget on the main Asset portal page. These include number of assets, average age in years, average condition, and the available percentage.

Filter

The filter page displays the same information as the Asset Summary pop-in. This section is collapsed by default.

You can change the filter at any time on this page, and the list of assets on this page will change to match filtered specifications. Use the drop-down fields to choose new filters, add a filter with the **Add Filter** button, or click the Xs on any filter option already applied to get rid of a filter option. Filters cannot be saved from this page, and must be created and saved in the Asset Filter Details page. For more information regarding filters and creating new filters, refer to the Asset Filters Page section.

Map

This section displays only if the filter option **Show on map** is checked for a filter on the Asset Filter Detail page, and mapping is an available option for your organization.

Click an asset to see the asset summary dialog with links to create a new service request or new work order.

Assets

The assets section provides a table of assets that can be selected and then actioned with the asset summary page buttons.

This table includes compliance information indicating whether an asset is compliant, when the most recent compliance check was run, and the model and version number of the configuration model used for compliance verification.

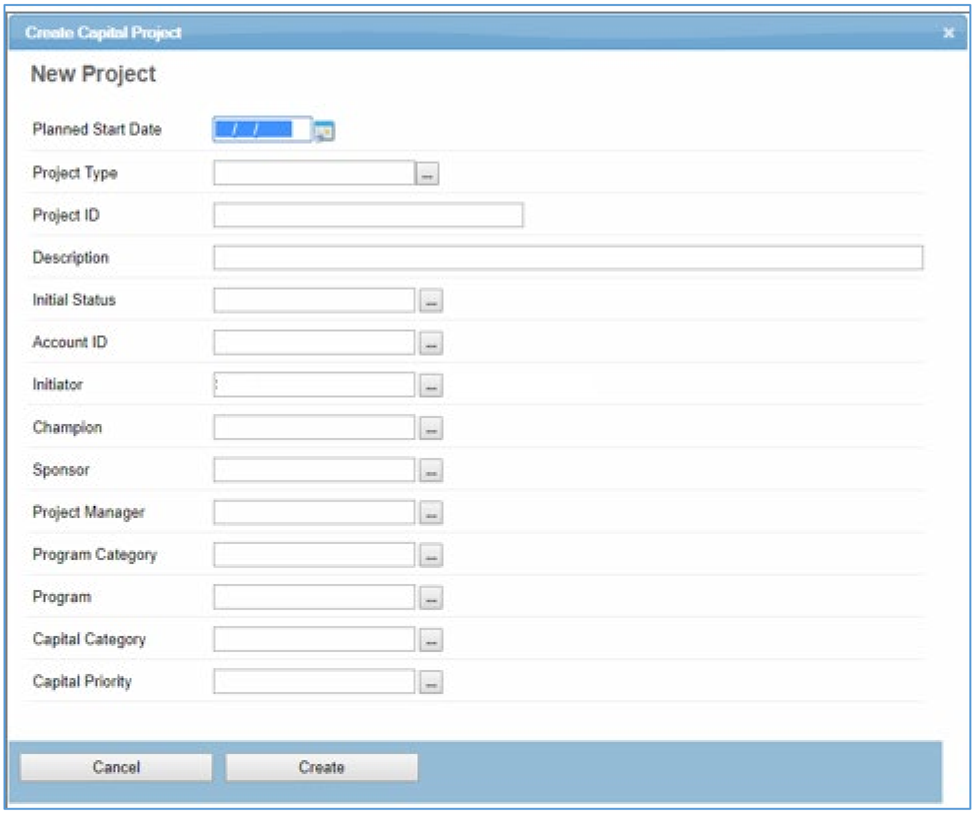
Asset Summary Page Buttons

The Assets section provides a summary

- **Create Capital Project:** Click this button to create a capital project for the selected assets.

    i. Click **Create Capital Project**.

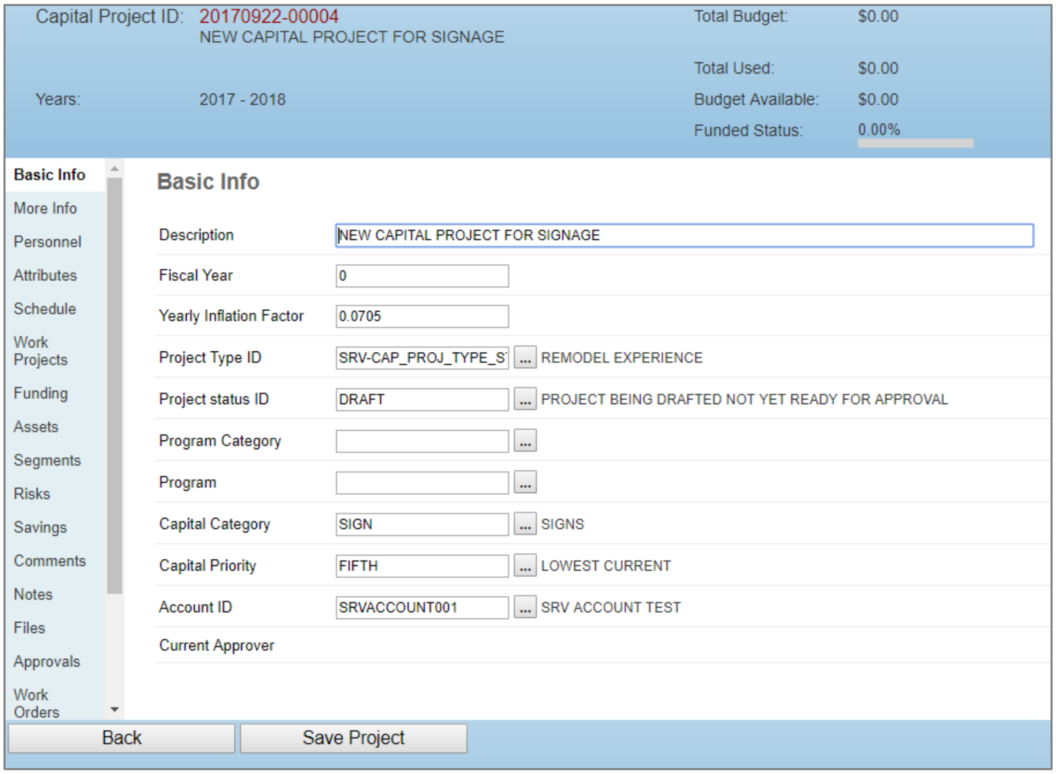
    The Create Capital Project pop-in displays.



ii. Enter the information for the new capital project. Information fields include Planned Start Date, Project Type, Project ID, Description, Initial Status, Account ID, Initiator, Champion, Sponsor, Project Manager, Program Category, Program, Capital Category, and Capital Priority.

iii. Click **Create** to create the new project, or **Cancel** to cancel and lose edits to the new project.

The new project is created and the Capital Project Details page displays for that project.



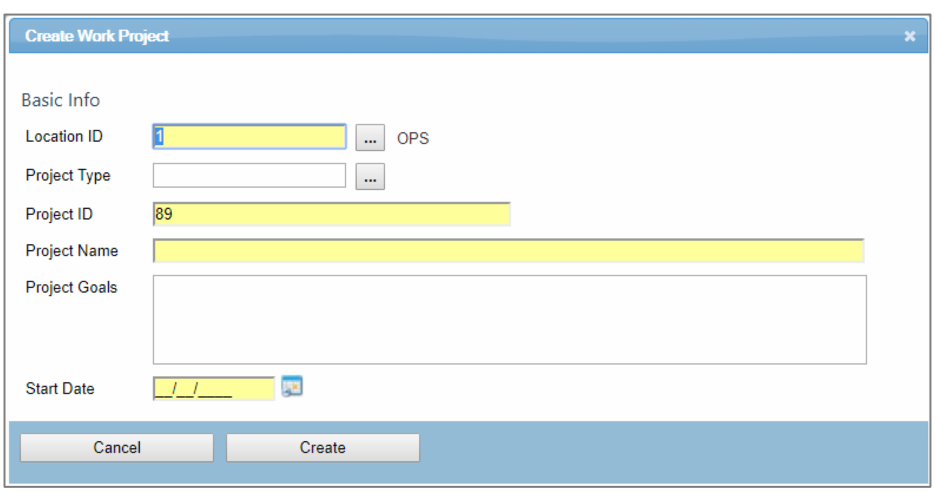
iv. Click **Save Project** to save your new project.

- **Create Work Project:** Click this button to create a work project for the selected assets.

Note: **Create Work Project** is for point assets only and does not support linear work orders. If you would like to add linear assets to a multi-asset work order or work project, they must be created separately and associated with the work project using the work task.

i. Click **Create Work Project**.

The Create Work Project pop-in displays.



ii. Enter the project information. Information fields include Location ID, Project Type, Project ID (this is automatically entered by the system, but can be edited as long as an unused ID is entered), Project Name, Project Goals, and Start Date. Yellow fields are required.

iii. When you are done, click **Save** to create and save the project, or click **Cancel** to cancel the creation and discard edits.

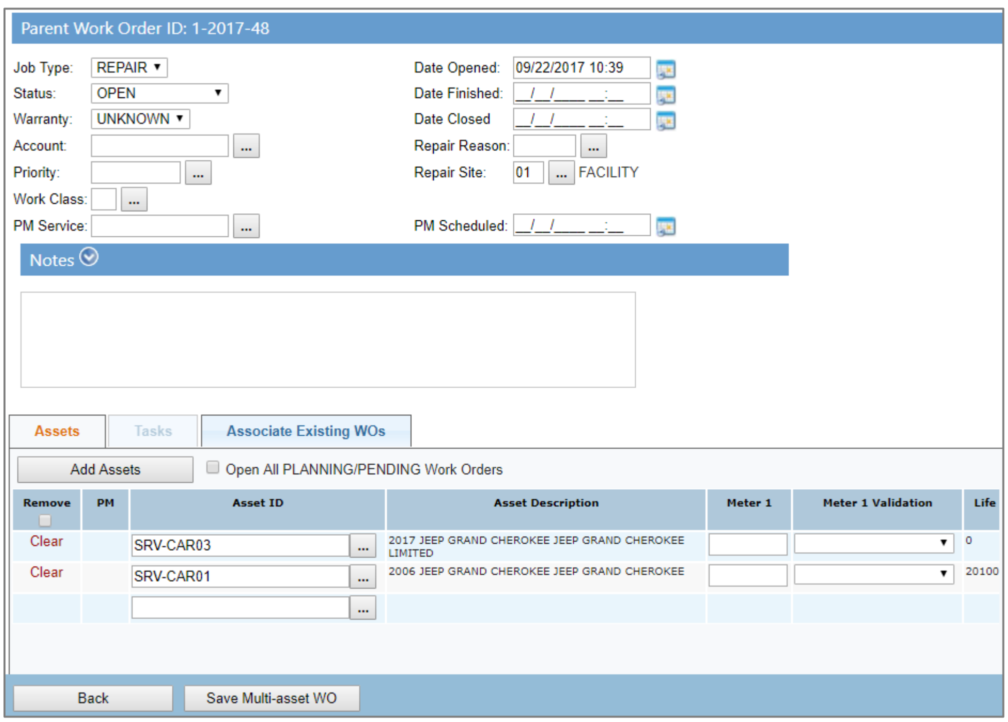
iv. If you created a new project, the Basic Info page for your new project displays.

- **Create Multi-asset WO:** Click **Create Multi-asset WO** to create a new work order for the selected multiple assets.

Note: **Create Multi-asset WO** is for point assets only, and does not support linear work orders. If you would like to add linear assets to a multi-asset work order or work project, they must be created separately and associated with the work project using the work task.

i. Click **Create Multi-asset WO**.

ii. The Multi-Asset Work Order Detail page (parent work order detail page) displays.



iii. For more information on multi-asset work orders and detailed information for this page, refer to the *Shop Activity Supervisor Work Management User Guide*.

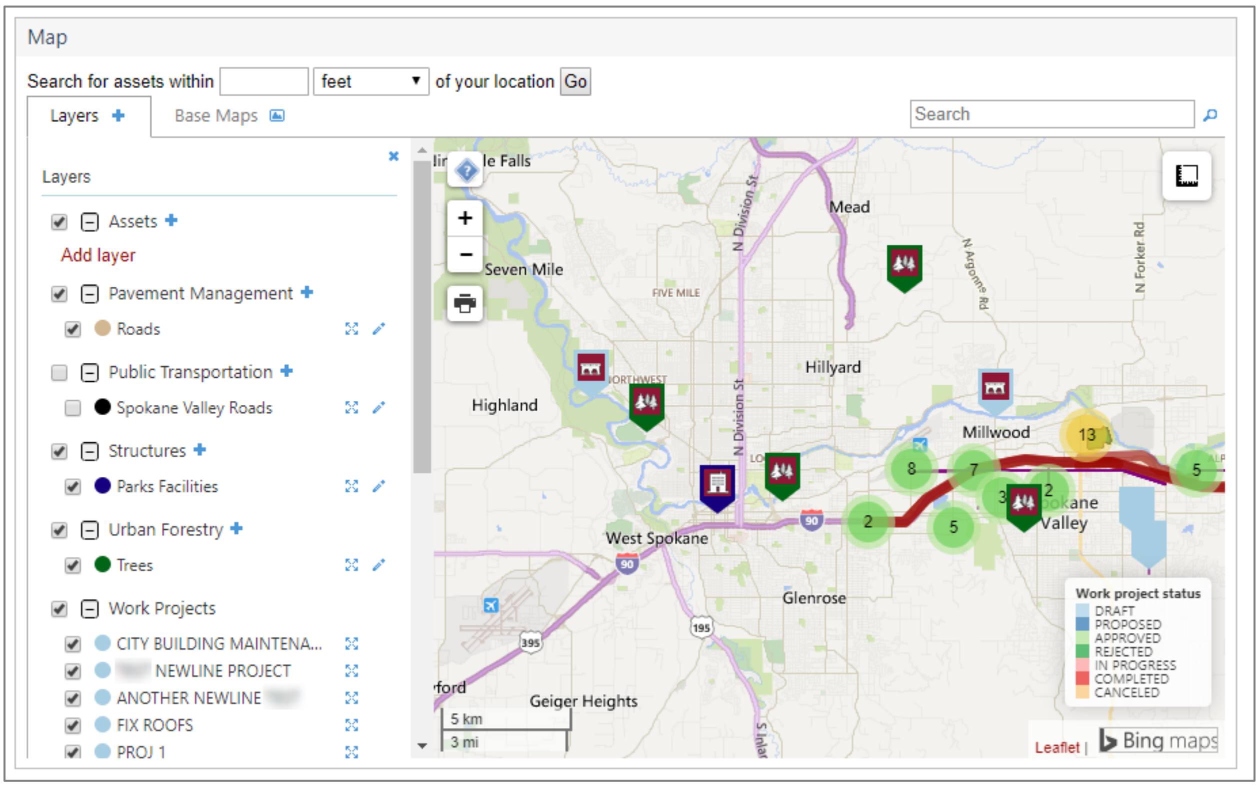
iv. Click **Save Multi-asset WO** to save the MAWO, or **Back** to return back to the previous page.

The work order is saved, and a blank Multi-Asset Work Order Detail page displays.

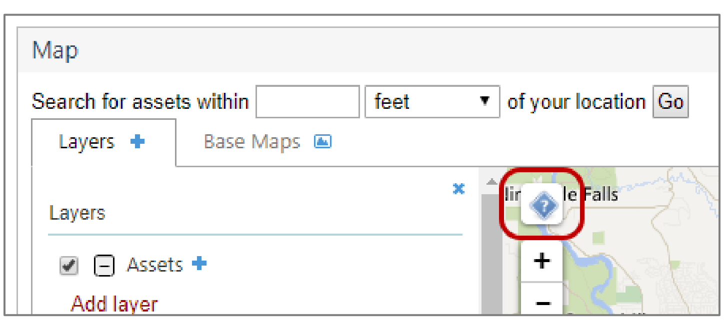
- **Export CSV:** Select assets in the table and click **Export CSV** to export the selected assets to a CSV.

Map

The Map gadget is available to display assets from the saved available filters for the current user and location.



For more detailed information, click the Help button in the top-left corner of the map to open the map help page.

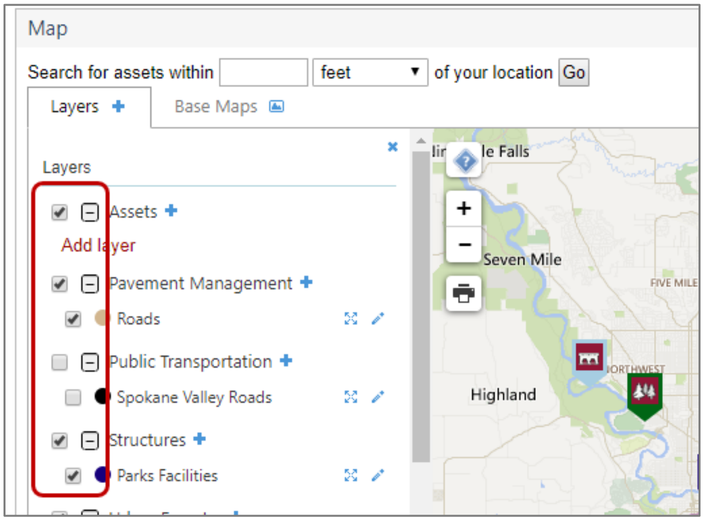


Tabs

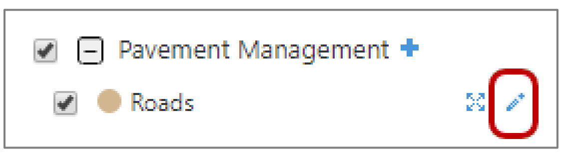
The Map gadget has two tabs, **Layers** and **Base maps**.

Layers

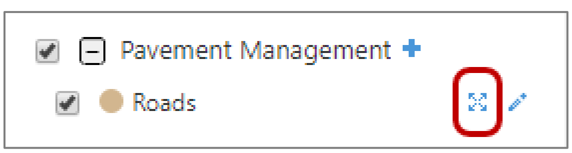
Use the Layers tab to choose which data to view on the map. Turn on and off the display of certain assets or groups by checking or unchecking the individual boxes to the left of the map.



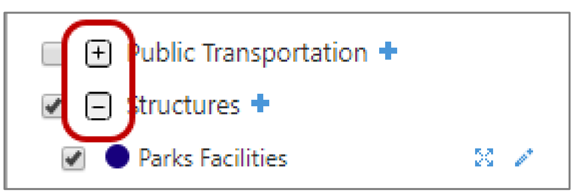
- To edit a filter, click the edit pencil to the right of the filter.



- To zoom to the asset in the map, click the Zoom to fit button.

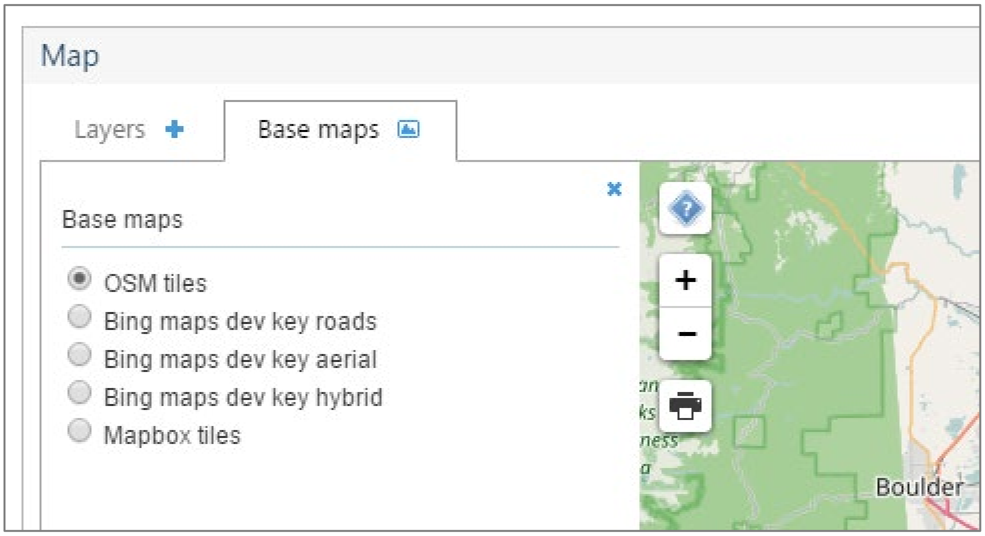


- Click the + and – buttons to expand or hide items in the groups or sections.



Base Maps

Use the Base Maps tab to choose the service you are using for base maps. This includes services like OSM, Bing, etc.



Multiple-instance Gadgets

Ad hoc Query

The Ad hoc Query gadget provides flexibility by allowing almost any saved Ad hoc Query report (that the user has access to) to be embedded in the gadget. Search and sort functions are included, as well as the ability to launch the report in a separate window.

Refer to the *Ad Hoc Query Administrator or User Guide*s for information about using the Ad Hoc Query module, or the *General Application Information* guide for more information on the Ad hoc Query gadget.

Capital Projects

This gadget displays a list of your capital projects and important information that can be viewed at a glance.

For more information on the Capital Projects gadget, refer to the *Capital Plans and Projects Administrator Guide*.

Metrics

The Metrics gadget displays user-defined metrics consisting of a single data value (similar to a Dashboard gauge but with only a label and a value). This gadget uses the same data sources supported by Dashboard module gauges: saved Ad hoc Query reports (with category KPI only), and advanced key performance indicators (KPIs), including ad hoc SQL statements (requires Dashboard module administrator access).

Refer to the *General Application Information* guide for more information on this gadget.

PM Forecast

The PM Forecast Gadget provides an outlook of future services and costs that an organization will expect to see when performing preventative maintenance (PM).

Preventive maintenance within EAM is the ability to define scheduled maintenance and inspections required to keep assets in a good, safe, and usable state. Once the PM services and schedules have been defined on an asset, the next due date or meter can be viewed. PM projections generates the services maintenance schedule up to the defined period to project out services or until the end of life for the asset. The resulting data is stored within EAM and can be viewed through this gadget.

Before setting up PM Projections, the PM services need to be setup and scheduled on the individual assets. Then using the PM Class, "Run Projections" will initialize the data and using "Maintain Projections" will update the projected schedule of services for an asset when PM services are performed, updated, and completed as these activities can change the projected schedule.

The PM Forecast Gadget summarizes information from the PM Projections table. Using the PM Forecast Gadget "Run Forecast" action in configuration, in the portal does not alter the PM Projection date. PM Projection data is only altered by using Equipment Class to run projections or by Maintaining Projections and allowing EAM activities such as completed PMs update the projection information.

Administrators must set up this gadget to have the forecast available.

To set up the gadget:

1. Click the edit pencil on the gadget.

    i. Title: Enter Title Here.

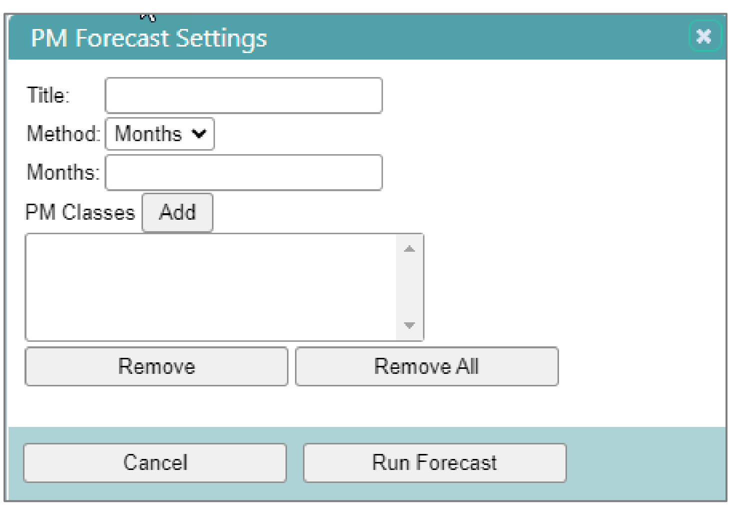
    ii. Method: Months or Meters - Look for projections based on services being due by Meter or Date.

    iii. Months/Meter: Summarize Services coming due between today and X amount of months/meters. For example:

    - Months: 12 Months, PM service due every 3 months, that will show 4 services due for every asset using the pm class.
    - Meter: 20000 Meters, PM service due every 5000 meters, that will show 4 services due for every asset using the pm class.

    iv. PM Classes: Add the PM Classes that have projections created (run or being maintained).

2. Click **Run Forecast** to run the forecast in the gadget or click **Cancel** to cancel and leave the gadget as is.



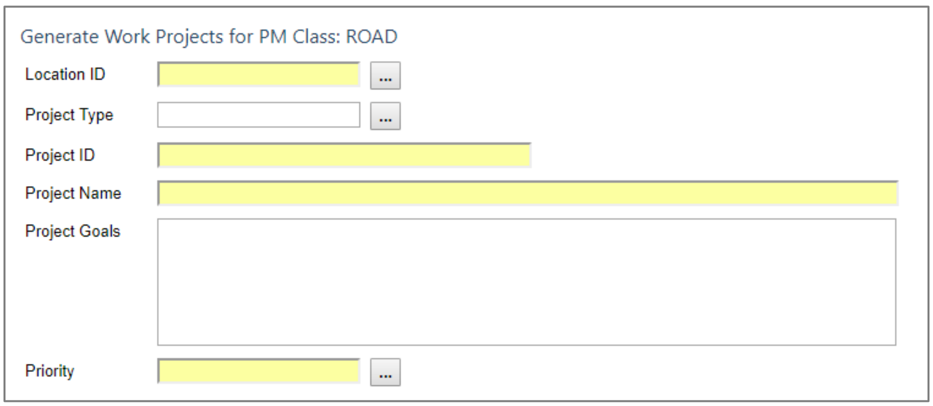
To view details of the forecast:

1. On the PM Forecast gadget, click **Details**.
2. View the PM Forecast Detail page opens.

To create a work project for the PM class:

1. Click **Create Work Project**.

   The Create Work Projects pop-in displays.

2. Enter the project information. Information fields include Location ID, Project Type, Project ID, Project Name, Project Goals, and Priority. Yellow fields are required.
3. When you are done, click **Done** to create and save the project, or click **Cancel** to cancel the creation and discard edits.

   If you created a new project, the Basic Info page for your new project displays.

URL

The URL gadget allows you to embed any URL (images, news feeds, webcams, maps, etc.) into an iFrame.

Refer to the *General Application Information* guide for more information on this gadget.

4. Understanding the Asset Portal

The Asset portal front page enables you to select a current working location with options to customize the layout, filter, and refresh data. Buttons include **Asset Filters**, Vi**ew Data Prep Assets**, and a **New Asset** button to create new assets. The default gadgets include: Asset Search, and Asset Summary

Asset Portal Buttons

Current Location Drop-down List

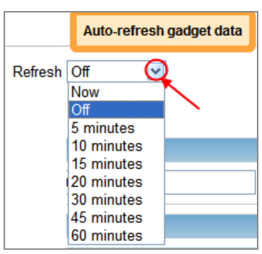
From the **Current Location** drop-down, select the shop in which you would like to view or manage. The location selection updates the current information on the page. The locations that appear in your drop-down selection box are limited based on your system access settings (Supported Locations area on the Employees – Primary Information screen).

Layout

To learn more about customizing your gadget layout, refer to the *Custom Gadget Layout – Reference Guide*.

Refresh

Select from the drop-down list, the frequency you want to auto-refresh the gadget data.



Asset Filters

Manage and create asset filters for asset summary gadget. Refer to the Asset Filters Page section for more information.

View Data Prep Assets

This opens the Asset Chooser which is pre-filtered to assets with DATA PREP status. For more information, refer to the View Data Prep Assets section.

Asset Profiles

This button opens the Asset Profiles set up page. For more information, refer to the Asset Profiles section.

New Asset

Click this button to go to the page for managing templates and creating assets from templates. Refer to the Create New Assets from a Template Page section for more information.

Search Assets

The Search Assets button allows you to search assets using the Asset Chooser.

Map Symbology

The Map Symbology button opens the Map Styles page. On this page, you can view details for current symbology and icons, or add or edit icons. Icons are displayed in category tabs divided by Equipment Types, Asset Categories, Asset Profiles, and Asset Types. Information is displayed based on your available locations.

Note: The icons that display on maps for assets are based on hierarchy of icons. The system uses the first available icon based on the hierarchy of equipment type, then asset category, asset profile, and lastly by asset type.

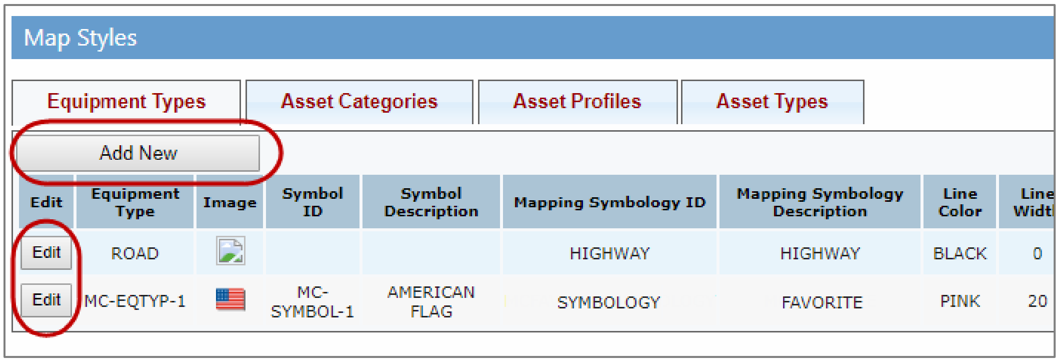
Note: Map symbology cannot be deleted as these icons can be used by others that have access to the same locations where the icon was added.

Adding a New Icon

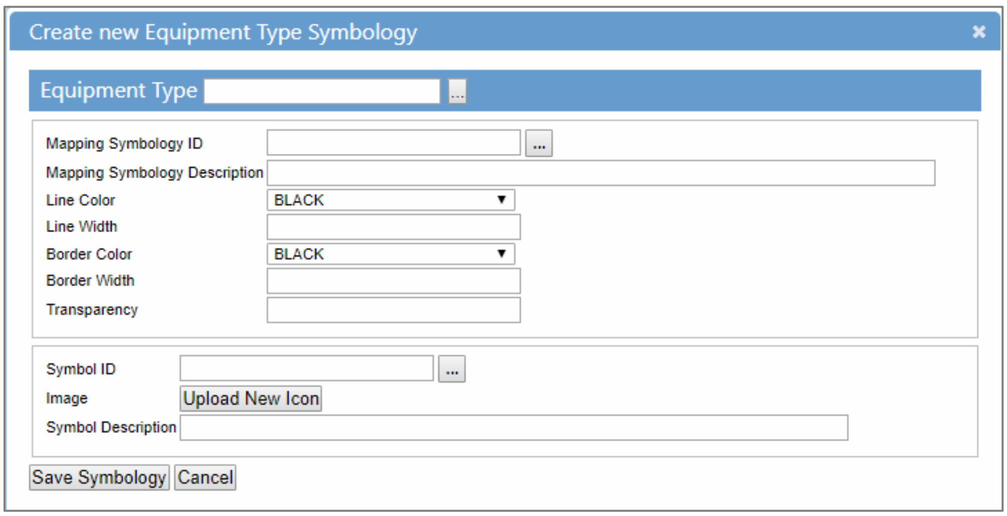
For the equipment types, asset categories, and asset profiles sections, you can add new icons for the mapping symbology.

To add or edit an icon:

1. On the category you want to add a symbol to, click **Add New**. If you are editing a previous symbol, click **Edit**.



The Create new Symbology pop-in displays.



2. Depending on the category item you are creating, choose an Equipment Type, Asset Category, or Asset Profile the symbol will be categorized under. The Equipment Type, Asset Category, and Asset Profiles must already be created before trying to add a symbol to them through the web portal.

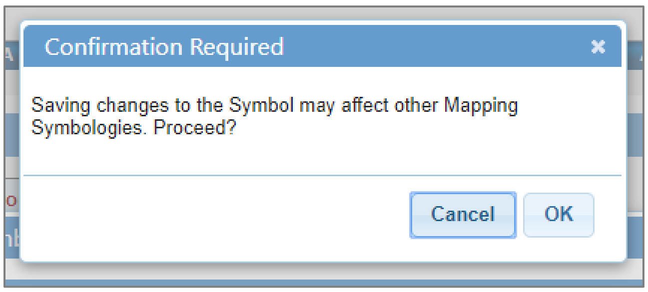
3. Enter the information for the new symbol. Each type has the same options, as follows:

   - **Mapping Symbology ID:** Enter a new ID, or choose an ID with the chooser button.
   - **Mapping Symbology Description:** A description of the symbology.
   - **Line Color:** Choose a color from the drop-down.
   - **Line Width:** Choose a width from the drop-down.
   - **Border Color:** Choose a color from the drop-down.
   - **Border Width:** Choose a width from the drop-down.
   - **Transparency:** Set the transparency value. This value must be between 0 and 100 (this is a percentage value).

- **Symbol ID:** Enter a new symbol ID, or use the same ID as preloaded from the **Mapping Symbology ID** field.
- **Image:** Click **Upload New Icon** to select the file from your computer to use for the symbol.
- **Symbol Description:** Enter a description of the symbol.

4. When you are done editing or adding information, click **Save Symbology**.

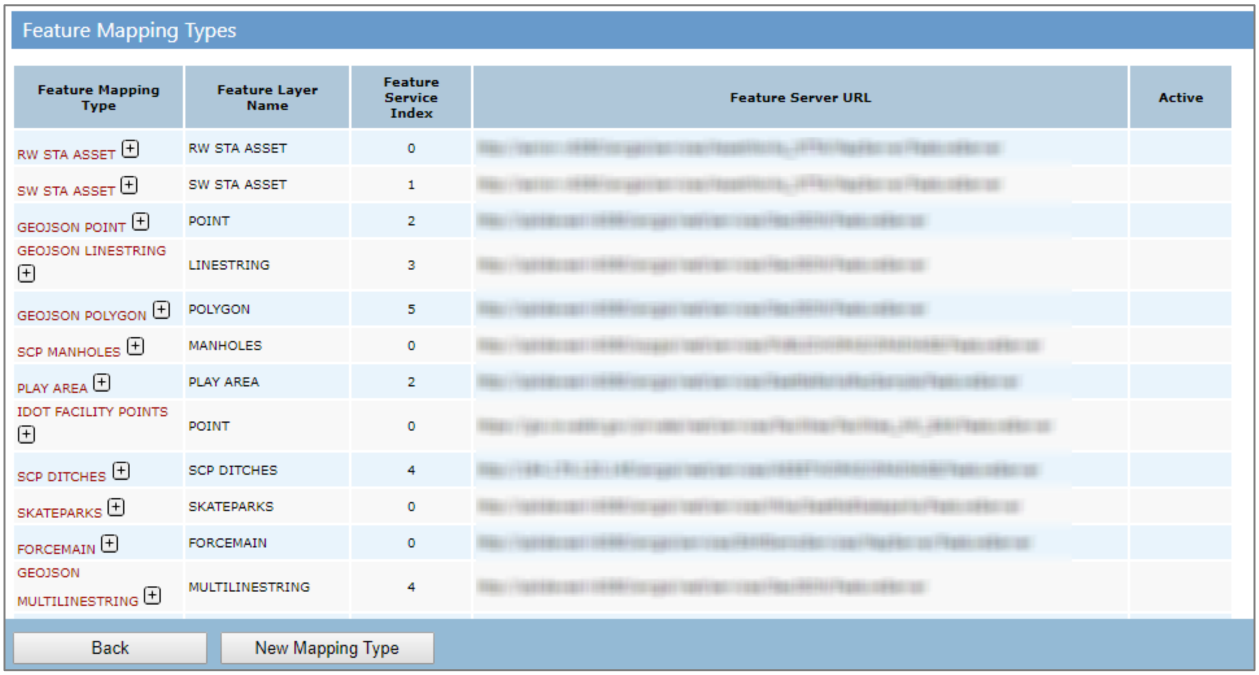
    - If you are editing an item and click **Save**, a warning displays. Click **OK** to continue, or **Cancel** to cancel changes.



The symbol is added or changed, and displays in the main page.

Feature Mapping

Click the Feature Mapping button to open the Feature Mapping Types page. This page enables you to add feature mappings. These feature mappings allow you to set a relationship between a GIS feature and a feature in this system. For example, a GIS feature called Asset ID can be mapped to the asset ID in this asset management system.

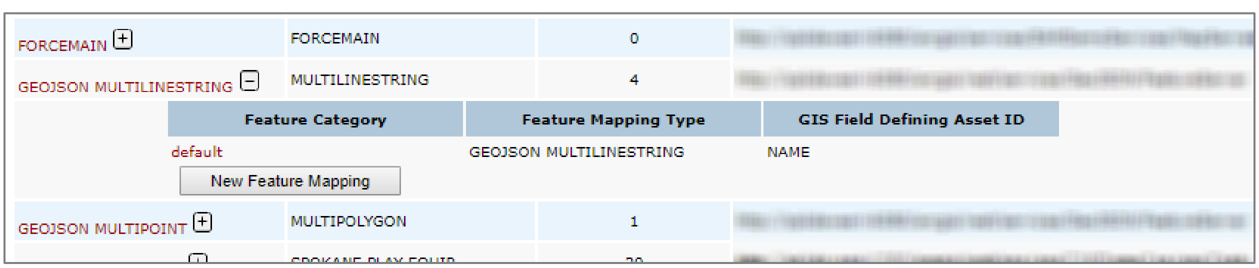


Feature Mapping Types

Feature Mapping Type	Feature Layer Name	Feature Service Index	Feature Server URL	Active
RW STA ASSET	RW STA ASSET	0		
SW STA ASSET	SW STA ASSET	1		
GEOJSON POINT	POINT	2		
GEOJSON LINESTRING	LINESTRING	3		
GEOJSON POLYGON	POLYGON	5		
SCP MANHOLES	MANHOLES	0		
PLAY AREA	PLAY AREA	2		
IDOT FACILITY POINTS	POINT	0		
SCP DITCHES	SCP DITCHES	4		
SKATEPARKS	SKATEPARKS	0		
FORCEMAIN	FORCEMAIN	0		
GEOJSON MULTILINESTRING	MULTILINESTRING	4		

This page displays information for each feature mapping type including the layer name, service index, server URL, and whether the item is active or not.

Click the **+** sign to view more information for an item including the feature category, mapping type, and the GIS field defining asset ID. Use the **New Feature Mapping** button to create a new feature mapping.



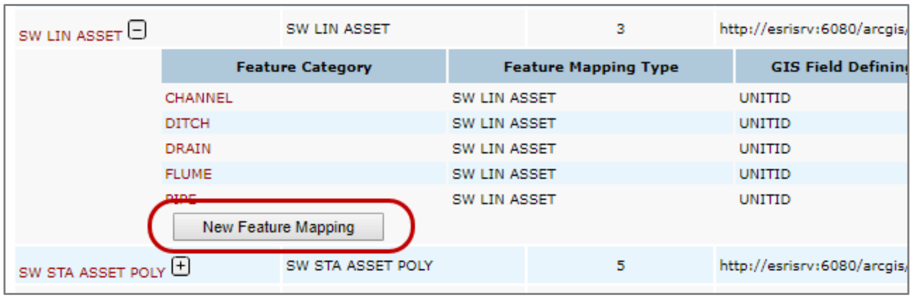
FORCEMAIN	FORCEMAIN	0	
GEOJSON MULTILINESTRING	MULTILINESTRING	4	

Feature Category	Feature Mapping Type	GIS Field Defining Asset ID
default	GEOJSON MULTILINESTRING	NAME

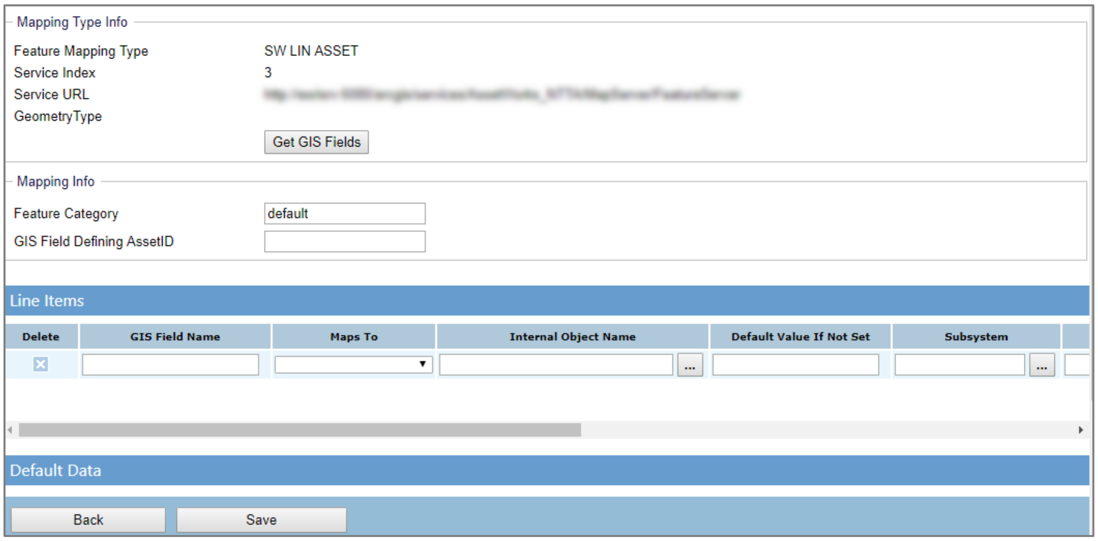
GEOJSON MULTIPOINT	MULTIPOLYGON	1	

To add a new feature mapping:

1. From the Feature Mapping Types page, in the expanded view of a mapping type, click **New Feature Mapping**.



2. The Mapping Type Info page displays.



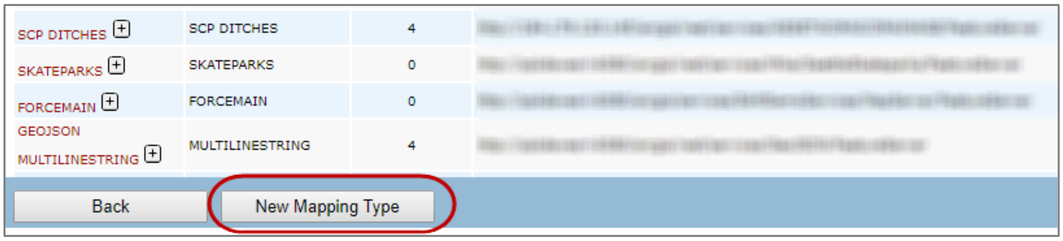
3. Enter the information on this page as needed to add feature mappings.

   - Click **Get GIS Fields** to use the service URL to get the GIS fields from the server.
   - In the Line Items area, enter data to create individual field mappings. For more information on the individual fields, refer to the help page for the GIS Feature Mapping screen.
   - In the Default Data area, enter an **Asset Template** name and click **Get Template Fields** to use a template for field mappings that have already been created. Once these are pulled in, update the individual GIS fields as needed.

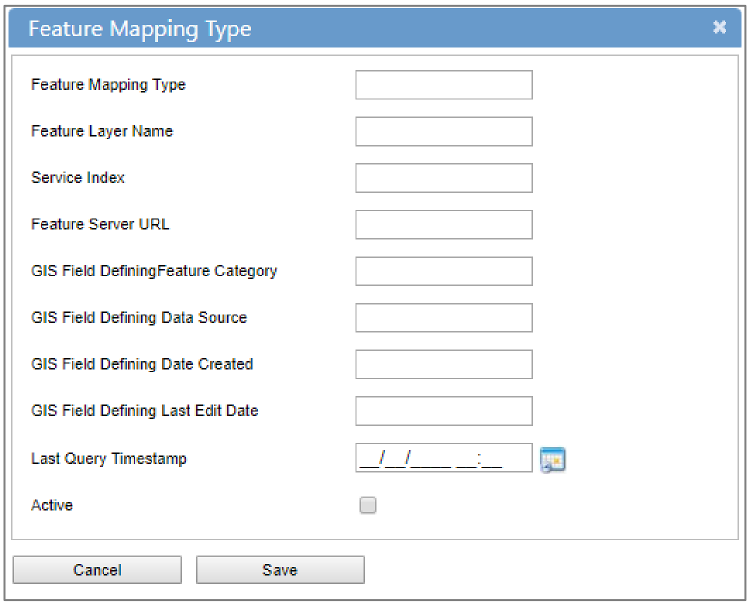
4. When all fields are entered and mapped, click **Save**.

To add a new mapping type:

1. On the Feature Mapping Types page, or under a specific feature mapping type, click **New Mapping Type**.



2. The Feature Mapping Type pop-in displays.



3. Add information in the fields as needed. The **Feature Mapping Type**, **Service Index**, and **Feature Server URL** fields are required.

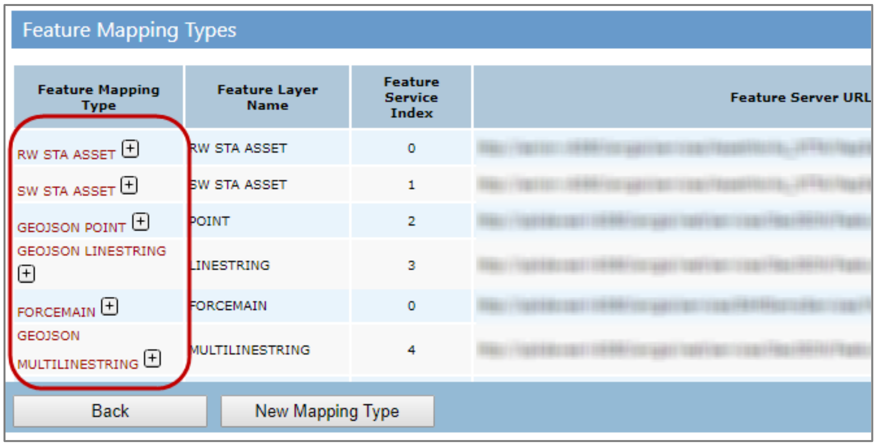
4. To make this feature type active and usable, be sure to check the **Active** checkbox.

5. After updating the necessary information, click **Save**. To exit and not save changes, click **Cancel**.

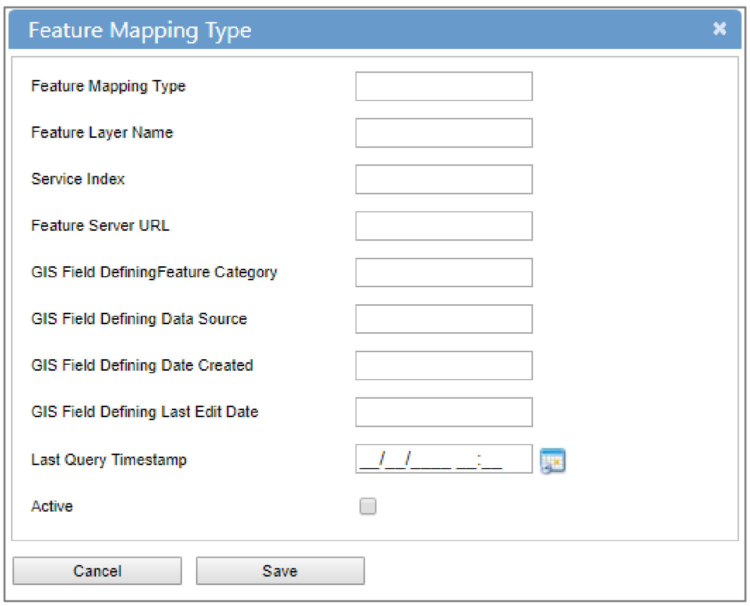
   The feature mapping type is added to the table.

To edit feature mapping types:

1. On the Feature Mapping Types page, click the red link for a type.



2. The Feature Mapping Type pop-in displays.



3. Add or edit information in the fields as needed. The **Feature Mapping Type**, **Service Index**, and **Feature Server URL** fields are required.

4. After updating the necessary information, click **Save**. To exit and not save changes, click **Cancel**.

   The feature mapping type is updated in the table.

Asset Filters Page

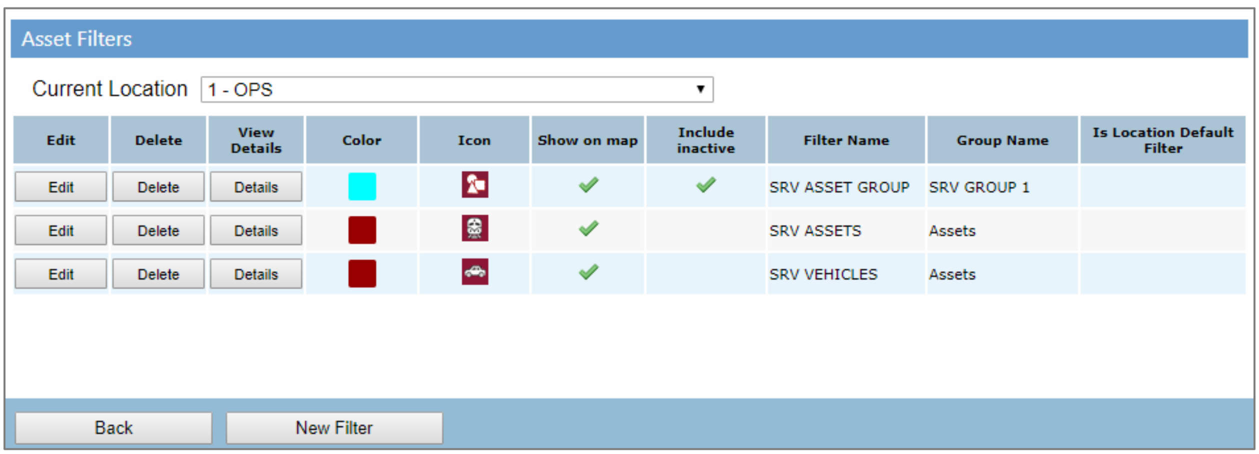
The Asset Filters page shows all filters defined for this location and user. Filters are stored by location and by user, so changing location will change the filters you see. Other users cannot share or see your filters.

Note: Custom filter information can be managed through the Enterprise Portal by going to the Custom Filters screen.

Note: Filters that were created prior to version 17 are automatically migrated to the new filter format when each user first visits the Asset portal. If any errors occurred when converting filters, and a filter does not show in the filter list, check the error log for details. Once the problem is corrected, the conversion will start the next time the user opens the Asset portal. The following options will be set for any converted filters:

- **Color:** Burgundy
- **Group Name:** Assets
- **Show on Map:** Enabled
- **Include inactive assets:** Disabled

To open the Asset Filters page, on the main Asset portal page, click **Asset Filters**.



This page allows users to create, delete, and edit filters, as well as change the active status and the display order of filters. Filters that are not active will not show in the Asset Summary gadget. The display order of filters in the Asset Summary gadget is determined by the display order (ascending), and then by the filter name (ascending).

Filter Display Order

You can change the order of the filters that display on the main Asset portal page in the Asset Summary gadget to the order which makes the most sense to you.

To change the display order:

1. In the display order column, type the display order you want the filters to display in.
2. Click **Save Changes**.

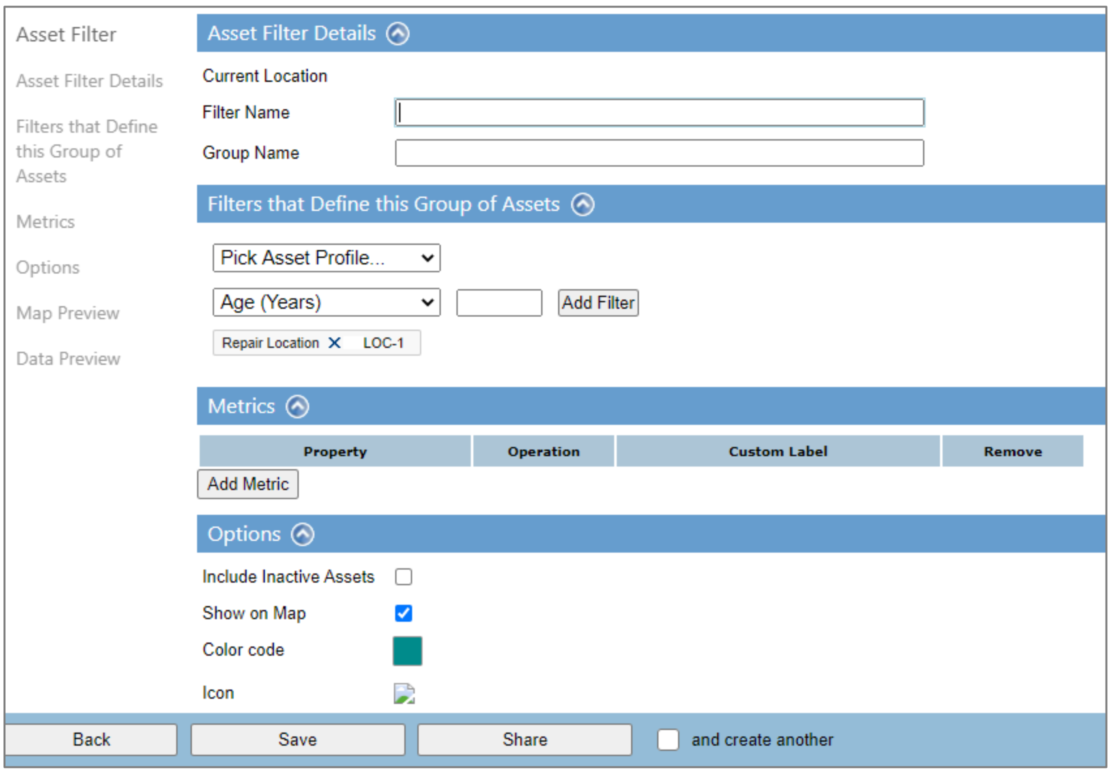
The filters in the Asset Summary change to match the new order.

Create a New Filter

To create a new filter:

1. On the Asset Filters page, click **New Filter**, or from the Asset Summary gadget, click **Create Filter**.

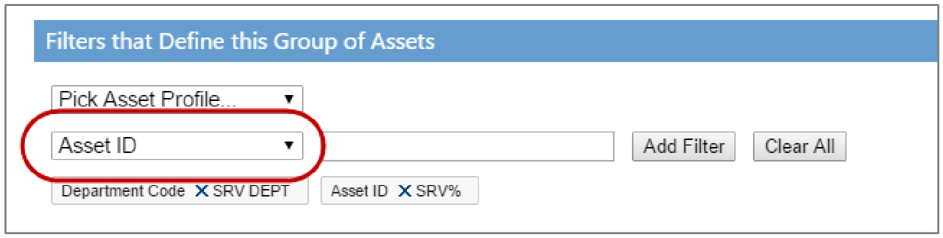
   The Asset Filter Details page displays.

2. Enter filter information in the Asset Filter Details section.
   - Fields in this section include **Filter Name** and **Group Name**.
3. Enter filter information in the Filters the Define this Group of Assets section.
   - Fields in this section include the **Pick Asset Profile** drop-down, and a drop-down for filter options.

     To add a filter option:

     a. Click the filter drop-down.



b. Choose the type of filter to add.

c. Add the filter data in the field to the right. For example, if you choose Asset ID and wanted to use any asset that started with XXX, type XXX% in the field to the right.

d. Click **Add Filter** to add the filter. Or click **Clear All** to clear all filters.

4. Enter filter information in the Metrics section.

   i. Choose the type of metric in the **Property** drop-down.

   ii. Choose the type of operation (average, sum, etc) in the **Operation** drop-down field

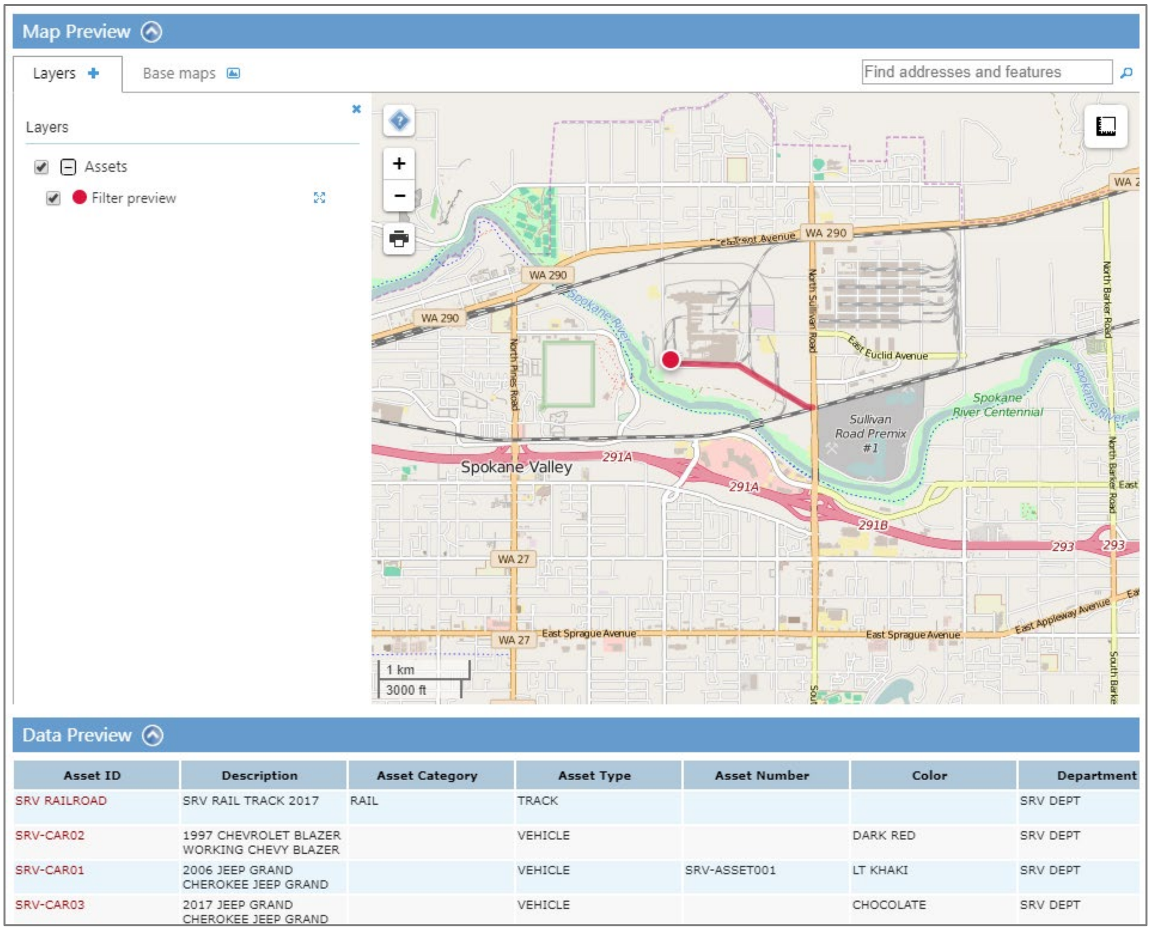
   iii. Add a custom label for the metric.

   iv. Click **Remove** to remove a metric you no longer want.

5. Enter filter information in the Options section.

   - **Include Inactive Assets:** Check this box to include inactive assets in the filter. This option is disabled by default.
   - **Show on Map:** Check this box to display the assets on a map. This is enabled by default.
   - **Color code:** Select a color for the assets in this filter.
   - **Icon:** Select an icon for the filter. Custom icons are also displayed for use. If a new icon is needed, click **Upload New Icon** to choose a file to add.

6. The Map Preview and Data Preview sections at the bottom of the page display what the map and data will look like with the filter you have set up.

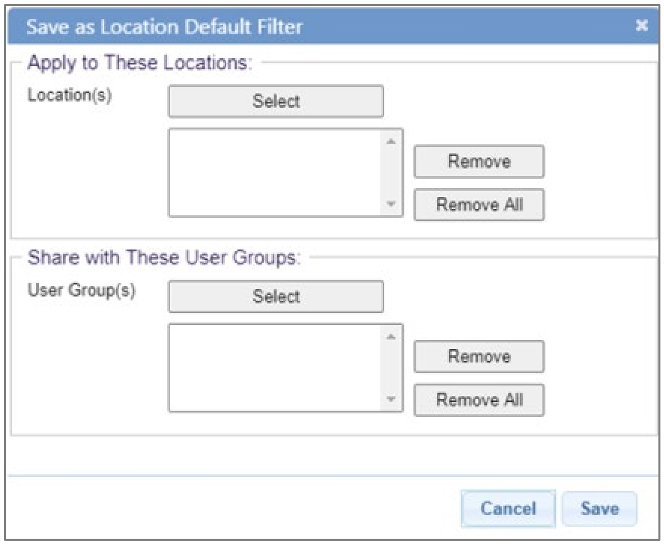


7. Check the **create another** checkbox if you need to create another filter after the current one is complete.

8. Save the filter using either the **Save** or **Share** button or click **Back** to leave the page and discard your changes.

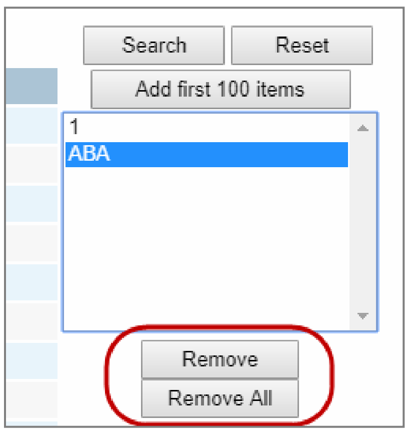
Note: Administrators can save the filter as a default filter for a location by using the **Share** button (which is only available for administrators). Default location filters display as bolded in filter drop-down menus.

- Click **Save** to save your filter.
- Click **Share** to save the filter as a default filter for a location.
    a. Click **Select** to open the Locations pop-in.



b. Choose the locations from the list as needed.

c. To remove a location from the list, select the location in the right pane, and click **Remove**, or click **Remove All** to remove all added locations.

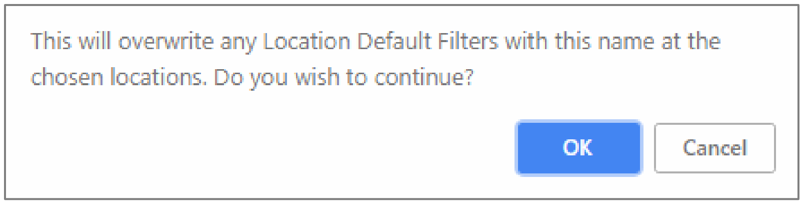


d. Click **Apply** to add the selected locations to the layout options pop-in.

e. Choose groups to share the filter with from the **Share with These User Groups** section in the same way as selecting a location.

f. Click **Save**.

A verification message displays warning about overwriting other default filters.



g. Click **OK** to save the filter.

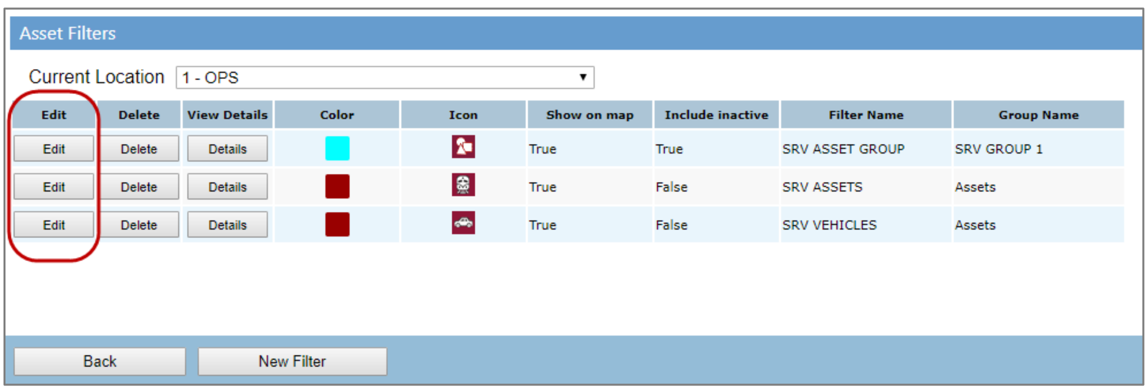
9. With a successful save, **Filter saved** displays.

Edit an Asset Portal Filter

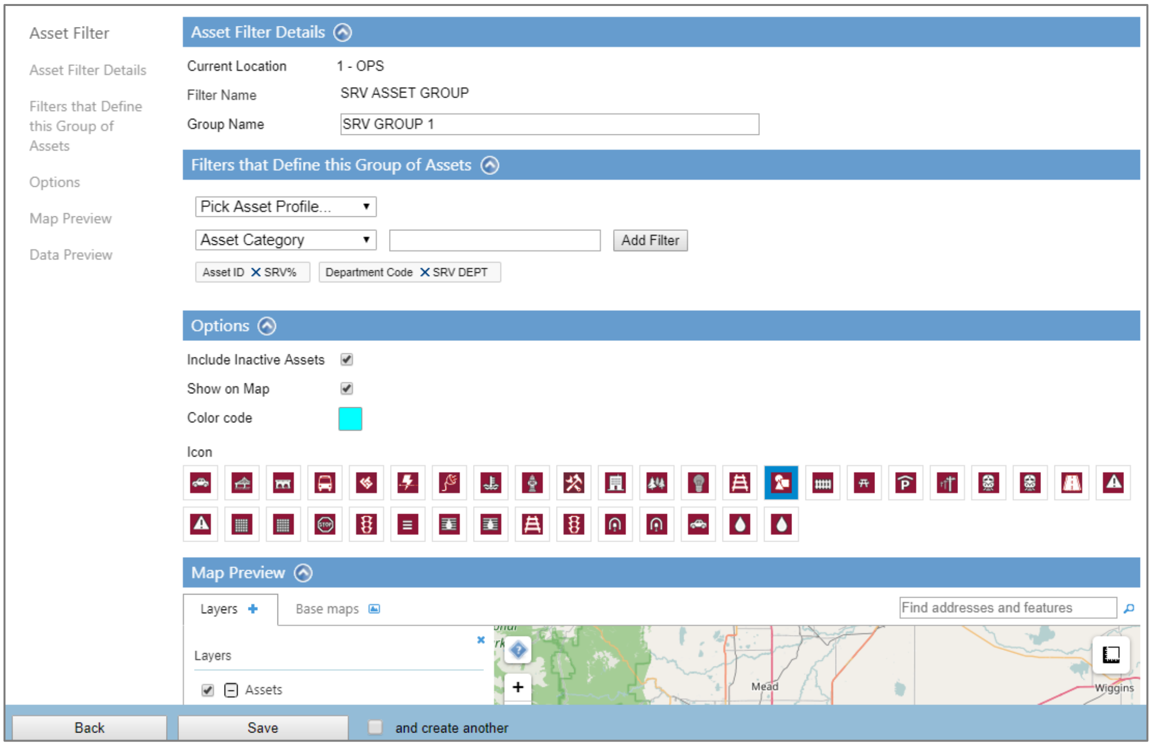
To edit an Asset portal filter:

From the main Asset portal page, click **Asset Filters** to open the Asset Filters page.

Click **Edit**.



The Asset Filter Details page displays.



Edit the filter as needed.

- To remove filter parameters, click the **X**s on the filter items, or click **Clear All** to remove all set filter parameters.

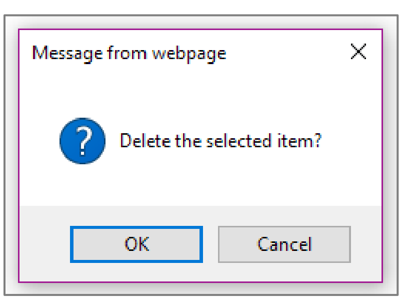
Click **Save** to save your filter, **Save as Location Default** (administrators only as described in the Create a New Filter section), or click **Back** to leave the page and discard your changes.

Deleting a Filter

To delete a filter:

1. Click **Delete**.

   A verification displays.



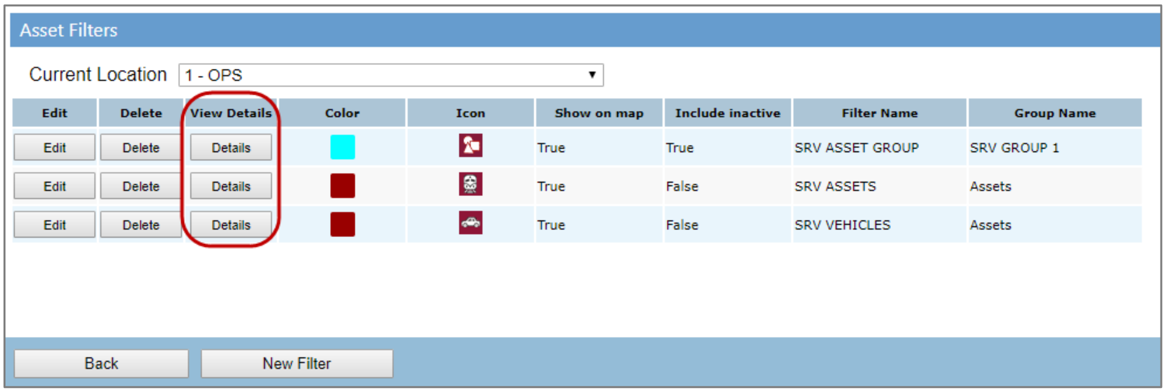
2. Click **OK** to delete the filter or Cancel to keep the filter.

Previewing the Filter

To preview the filter, follow the steps below. Previewing a filter does not allow you to create service requests or work orders.

To preview the filter in the Asset Chooser:

Click View Details.


Asset Filters

Current Location 1 - OPS

Edit	Delete	View Details	Color	Icon	Show on map	Include inactive	Filter Name	Group Name
Edit	Delete	Details			True	True	SRV ASSET GROUP	SRV GROUP 1
Edit	Delete	Details			True	False	SRV ASSETS	Assets
Edit	Delete	Details			True	False	SRV VEHICLES	Assets

Back New Filter

The Asset Summary page displays.

Create New Assets From a Template Page

Template Page Controls

Search Templates: The Search Templates field allows you to search through existing templates. If there are large lists of templates, this option makes it easy to find the needed template.

- Enter your search and click **Search** to find a template.
- Click **Clear** to clear the Search field.

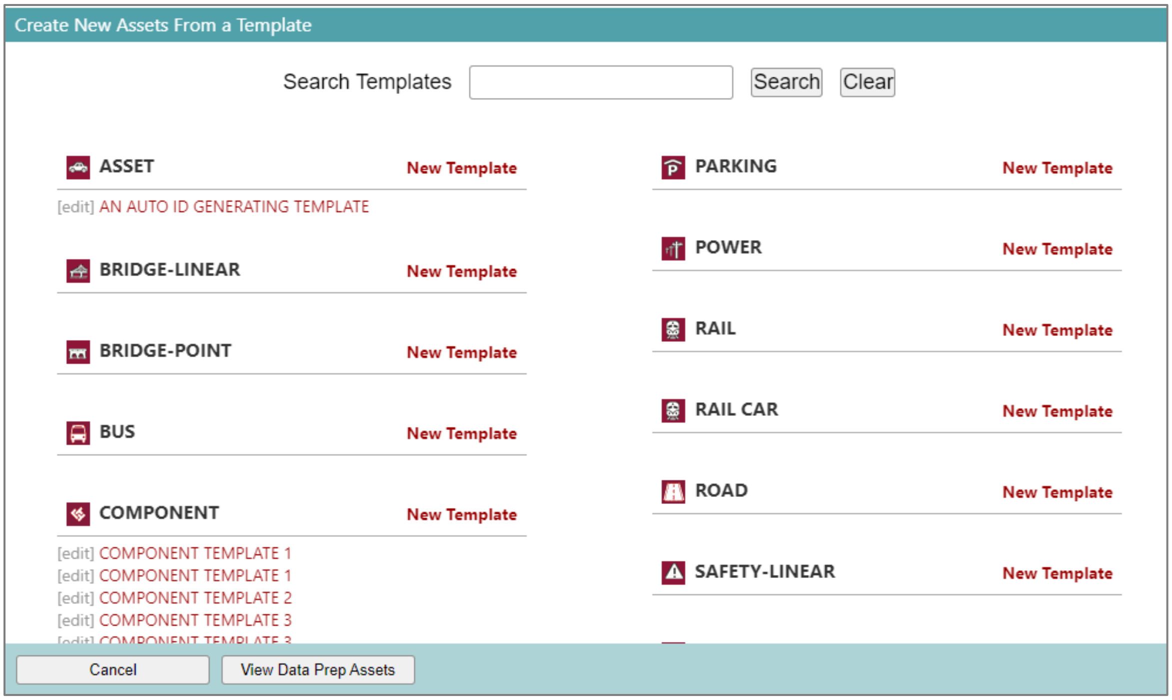
Cancel: Cancel creating actions on this page and return to the main Assets page.

View Data Prep Assets: Opens the Asset Chooser to see all assets with DATA PREP status based on the **Default DATA PREP lifecycle code for new assets** setting in the Module Settings page.

Create a New Template

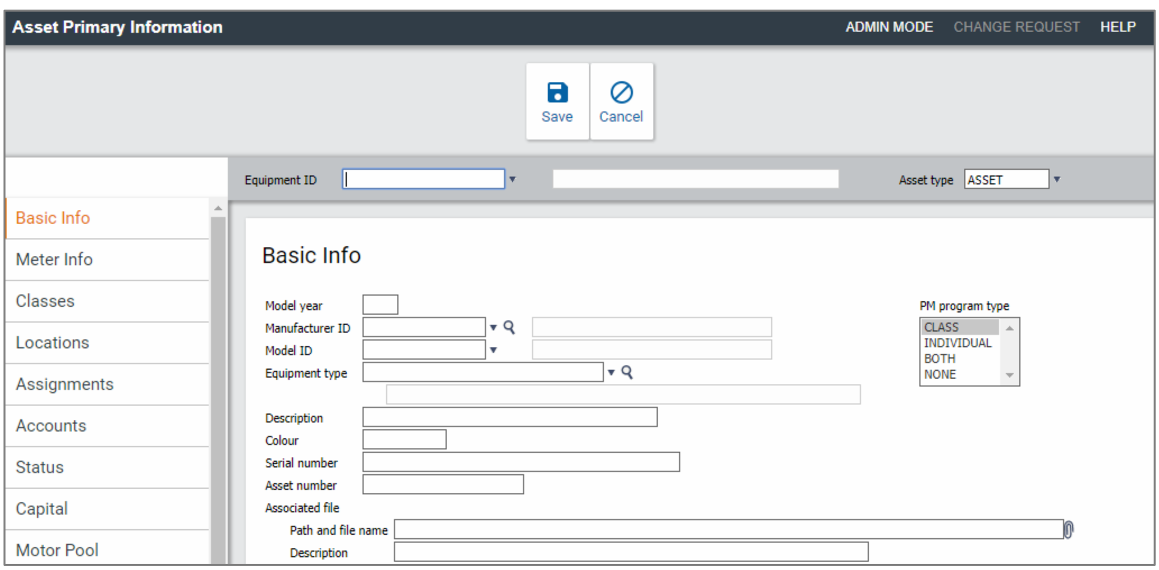
1. From the main Asset page, click **New Asset**.

   The Create New Assets From a Template page displays.



2. Click **New Template** in the needed category.

The screen for that type of asset displays ready to edit and enter the information.



3. Enter the information for the template as needed.

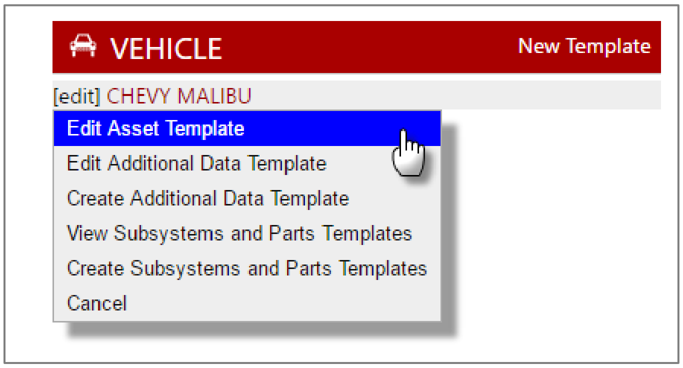
4. Click **Save**.

Edit a Template

To edit a template:

1. From the Create New Assets From a Template page, click edit next to the template that needs editing.

   The edit menu displays.

2. Choose the option needed for editing:

   - **Edit Asset Template:** Opens the screen to edit the main asset information.
   - **Edit Additional Data Template:** Opens the appropriate additional data screen to edit additional data.
   - **Create Additional Data Template:** Opens the appropriate additional data screen to add additional data.
   - **View Subsystems and Parts Templates:** Opens the appropriate subsystem and parts screen to view subsystems and parts templates.
   - **Create Subsystems and Parts Templates:** Opens the appropriate subsystem and parts screen to add subsystems and parts templates.
   - **Cancel:** Cancels editing and does not change the template.

3. When you are done editing a template, click **Save**.

Create a New Asset

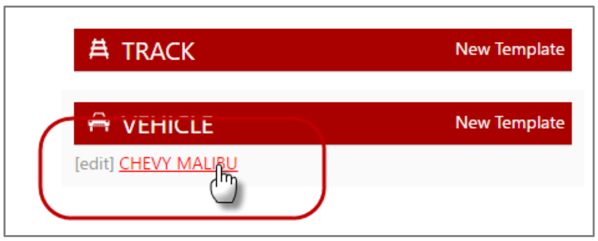
Create an asset with the New Asset pop-in. This process allows you to create an asset from a template that has automatically fills in the basic information. This allows you to easily duplicate the most basic information and fill in specific asset information for each new asset you create.

To create an asset from a template:

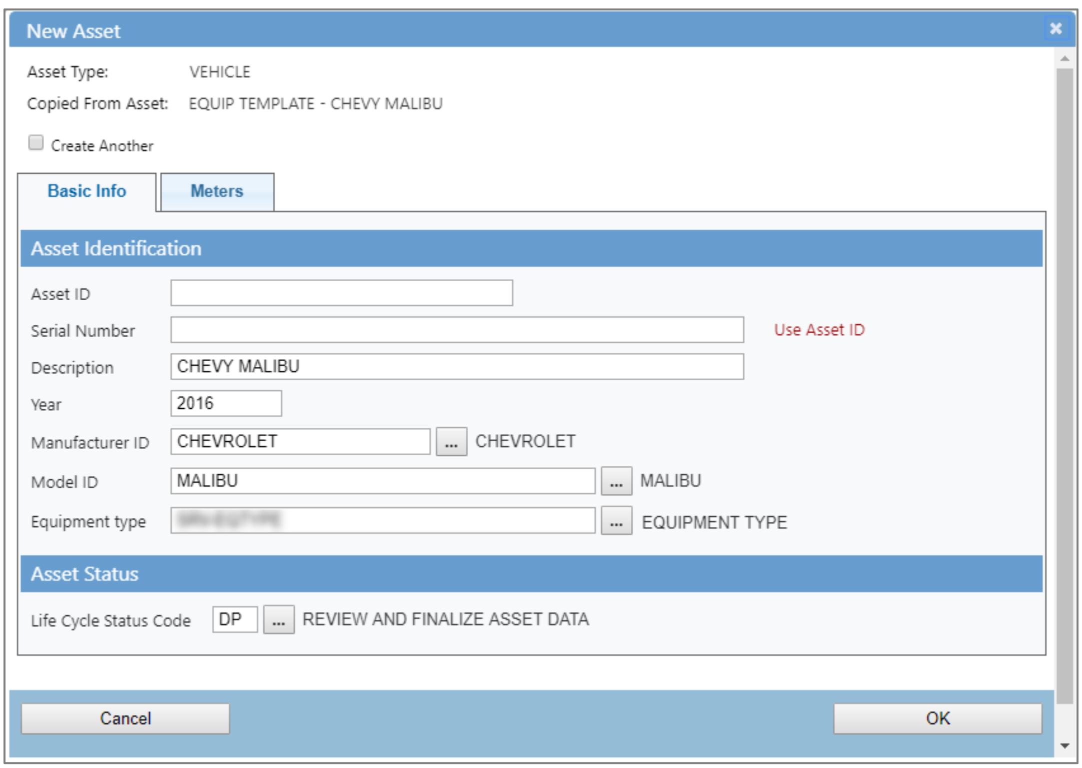
1. From the main Assets page, click **New Asset**.

   The Create New Assets From a Template page displays.

2. Click the template needed for a new asset.



   The New Asset pop-in displays.



3. Fill out the information tabs. There are several tabs that will display depending on the type of asset you are creating.

   - **Basic Info Tab:** Enter the basic asset information. This tab always displays.

  - **Asset ID:** This field is required. To auto-generate the asset ID, the template must be assigned an asset category that is setup to automatically generate asset IDs.

    Note: Asset IDs can only contain the following characters: **A** - **Z**, **0** - **9**, hyphens (**-**), periods (**.**) and spaces.

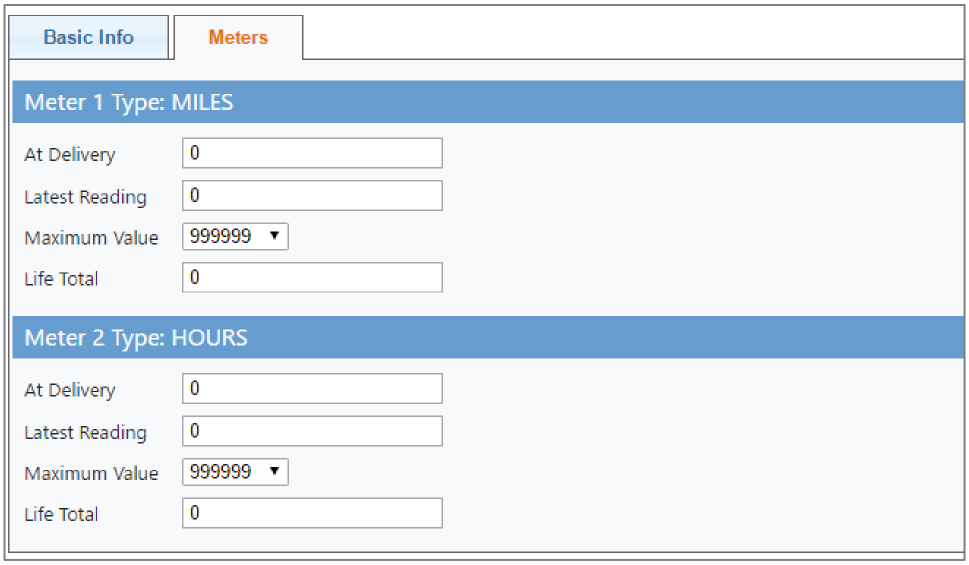
  - **Serial Number:** This field is required based on asset type (for example, types such as SIGN and FORESTRY do not typically require serial numbers, so this field is optional in some cases). Copy the asset ID into the serial number field by clicking the **Use Asset ID** hyperlink. If the serial number is required, and left blank, an error will display when you click **OK**.

  - **Description:** This field is required based on asset type (for example, some linear assets do not require a description). It is recommended to always enter a description since it helps end users identify this asset in the system.

  - **Year, Manufacturer ID, Model ID, Equipment Type:** These fields are editable, but are preloaded from the asset template. The choice-lists for these items show only active items.

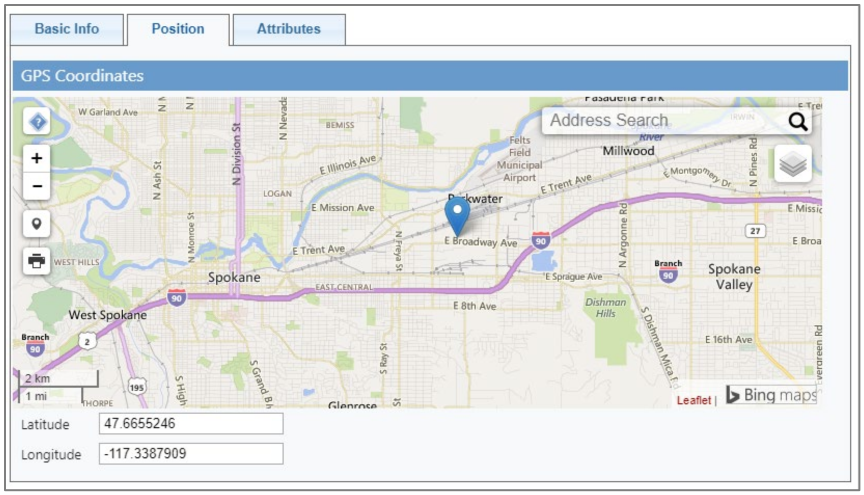
  - **Life Cycle Status Code:** This code defaults to the DATA PREP status code defined by the module settings. You can override this if, for example, you choose to make the asset immediately active. This value will reset to the default value each time a new asset is created (it will not preserve the previously entered value if overridden).

- **Meters Tab:** This tab shows only if the template asset has at least one meter type defined by its meters class. Assets can have zero, one, or two meters defined. Each set of meter fields is grouped by the meter type under a heading that shows the meter type name (for example, MILES, HOURS, HUBOMETER, etc.).

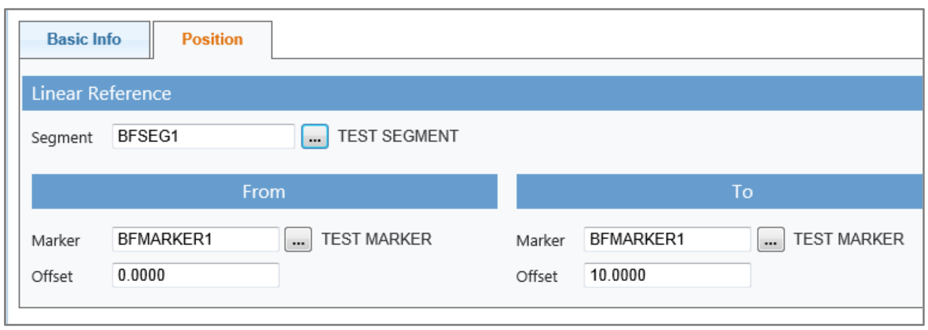


  - **At Delivery:** The value of the meter at delivery.
  - **Latest Reading:** The latest meter reading (in the case of creating an asset, if the meter reading has changed at all since delivery).
  - **Maximum Value:** The maximum meter value (this determines the meter rollover and digit limit).
  - **Life Total:** The total meter value in case the meter has rolled over.

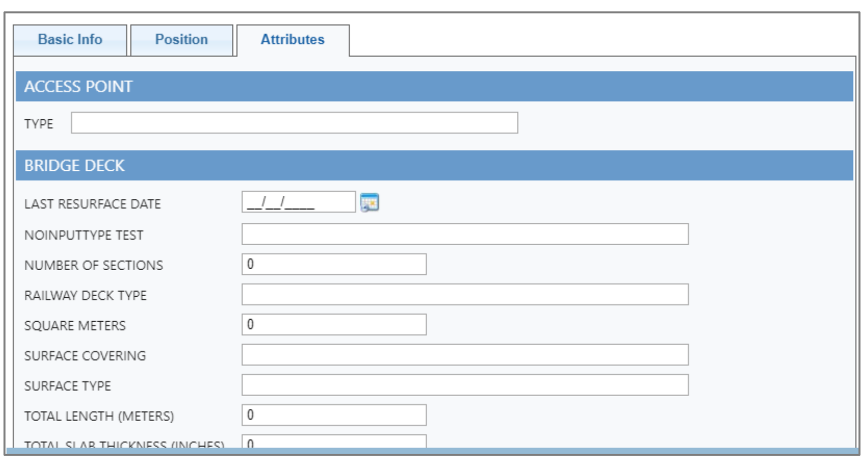
- **Position Tab:** The Position tab shows only if the template asset is a linear referenced asset, or have latitude and longitude defined.
  - **Latitude and Longitude:** The pair of geographic coordinates that identify the location of the asset on planet Earth. Note that to integrate with the Mapping module, the latitude and longitude must be expressed in decimal degrees notation (such as 45.01234, -117.01234, not 51° 28' 38" N). This information can be obtained by adding a pin to the map. The map then displays the latitude and longitude information.



- **Segment, Marker, and Offset:** The set of linear reference points that define this asset. The template asset determines whether the linear reference is single-point or dual-point. The linear reference fields are required if the template asset is related to a segment. The tab can display one or two markers depending on if the asset is a singular point asset or linear referenced with multiple markers.



- **Attributes Tab:** Use this tab to add attributes to the new asset.

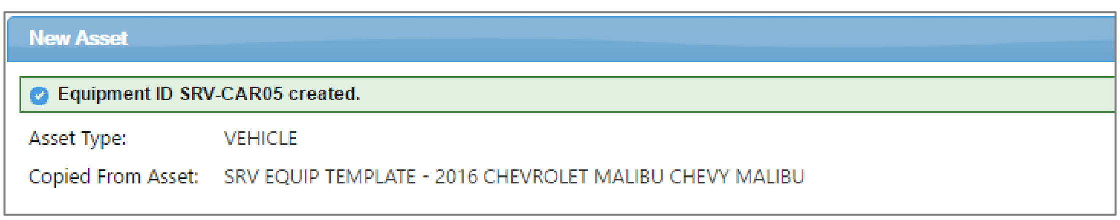


4. Check the needed checkboxes for parts and subsystems or creating another asset.

- **Copy Subsystems and Parts:** This option is displayed only if the template asset has at least one record defined via the Equipment – Subsystems and Parts screen where the template's asset ID is saved to the **Equipment ID** field on that screen. Note that this should only be used when the subsystems and parts will have data that is specific to and different for each individual asset being created. Defining subsystems and parts via equipment type or equipment class for maintenance is the alternative method where information is defined that is common to all assets of that equipment type or maintenance class, respectively. If this checkbox displays, the checkbox is checked by default and will stay checked (or unchecked) after each asset is created. If checked you click **OK**, all of the asset-specific subsystems and parts records defined for the template asset ID will be copied to the new asset.
- **Create Another:** This option always displays. Check this checkbox to create another asset from the same template. This can be useful when creating multiple assets from the same template. This is unchecked by default. If you check this box, it will stay checked after each asset is created.
- **Copy Additional Data:** This is displayed only if the template asset has additional data defined via the Equipment - Additional Data screen. If shown, this box is checked by default and will stay checked (or unchecked) after each asset is created. If checked when you click **OK**, the additional data defined for the template asset ID will be copied to the new asset.

5. When you are done entering asset information, click **OK**. You can also click **Cancel** to leave this pop-in without creating the current asset.

   A confirmation message displays.



6. Click **OK** to exit the New Asset pop-in.

Asset Profiles

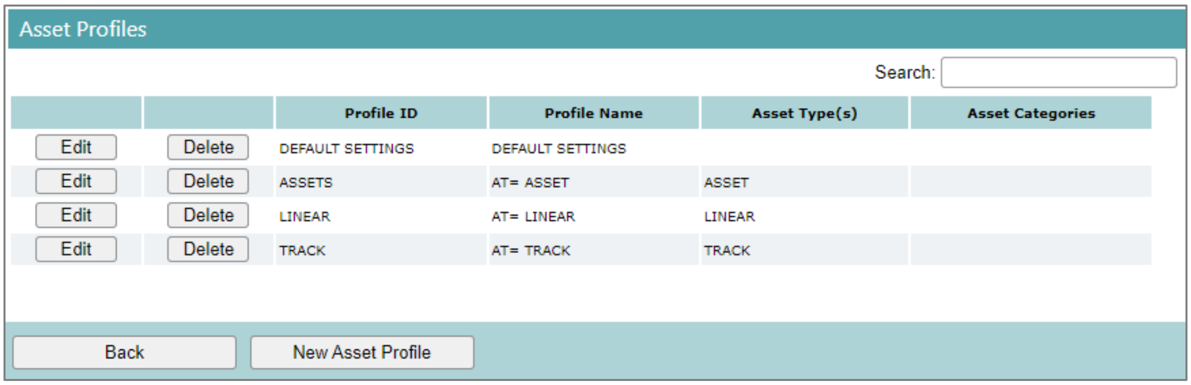
This workflow allows you to set customizable header control that supports different profiles based on the asset's asset type (i.e., asset, component, linear, inventory rebuild, etc.). Choose which fields, depending on the context, to display in the page's header for each asset type. Clicking this button opens the Asset Profile Detail page where you may add, edit, or delete different profiles.

To open the Asset Profiles page:

From the Asset Management portal page, click **Asset Profiles** to open the **Asset Profile Detail** page.

The list of currently-defined header profiles and their associated Asset Types display.

The Search field narrows the list to only display profile names and locations that contain the search characters entered.



*There is always at least one profile available, which is named **Default Settings**, and this is used when there is no other profile to apply. Because Production Runs do not have an Asset Type, the **Default Settings** profile is also the profile that is used to customize the display of production run fields.*

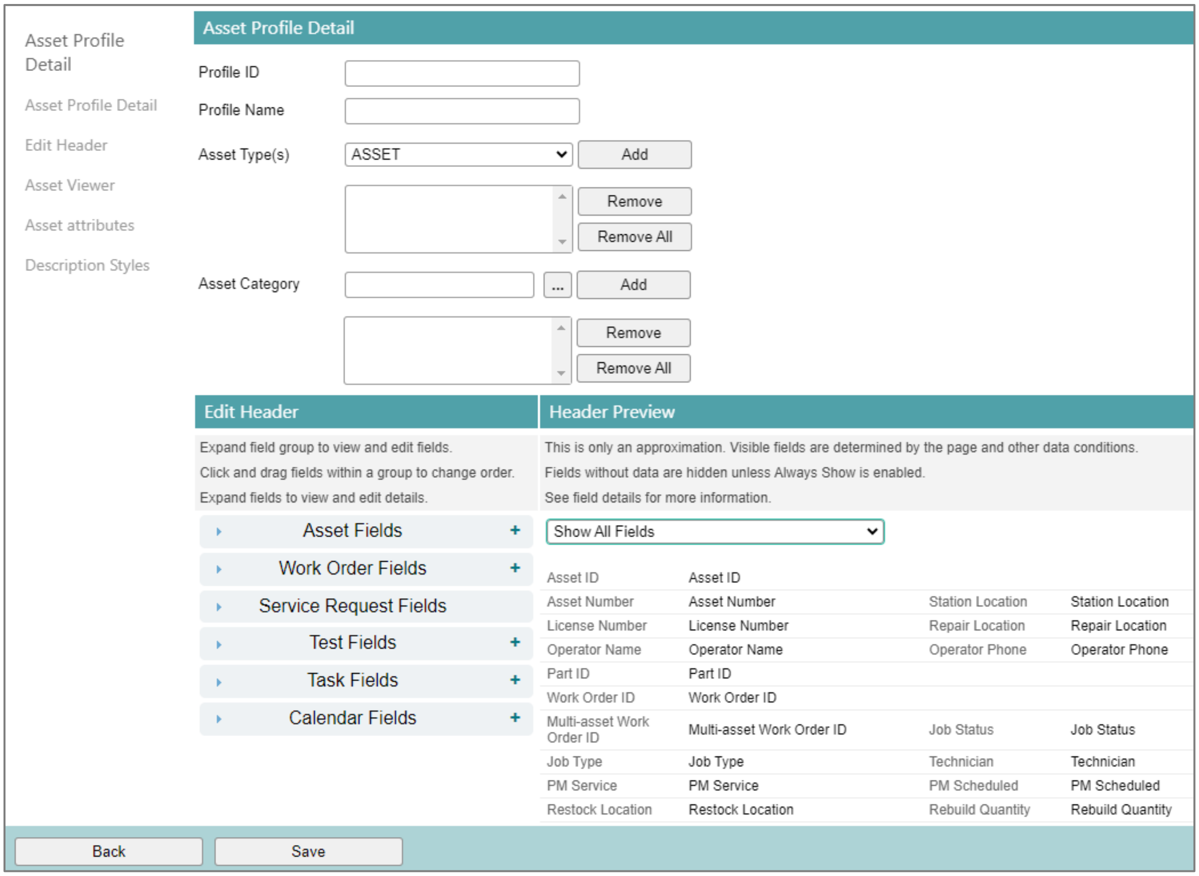
Add New Profiles or Edit Existing Profiles

When adding a new profile or editing an existing profile, use the Header Profile Detail page.

From the Asset Profiles page do one of the following:

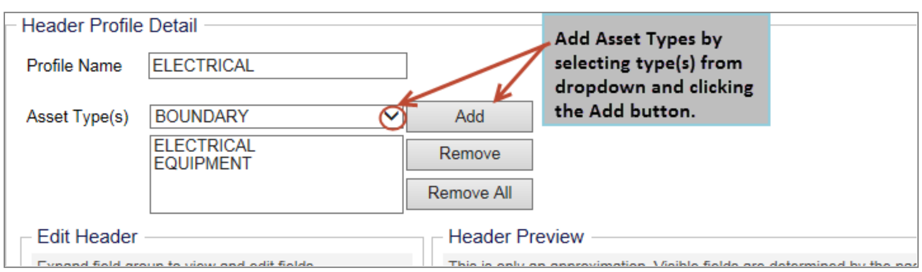
- Click **Edit** on an existing profile, or **New Asset Profile** to create a new profile.
- Click **Delete** to delete a profile. Click **OK** to verify that you want to delete the profile.

If you clicked Edit or New Asset Profile, the Asset Profile Detail page displays.



The Header Profile Detail Edit page

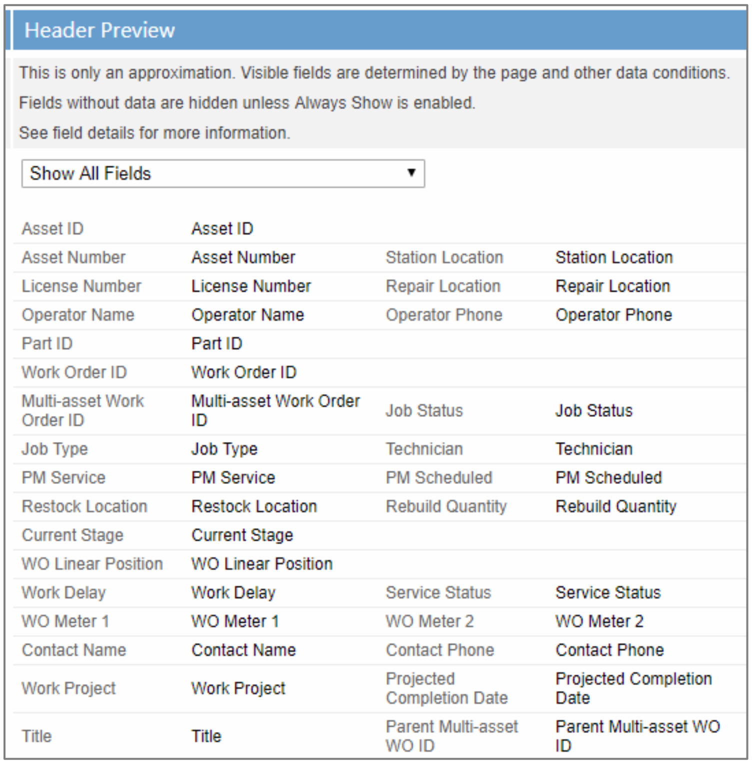
From this page, you can choose one or more asset types to assign to the profile. Asset type assignment is not available for the **Default Settings** profile.



Select asset types to add to the profile as desired

Header Preview Section

From the Header Profile Detail page, it is possible to customize header profiles, and it is also possible to preview the header in the Header Preview section.


Header Preview

This is only an approximation. Visible fields are determined by the page and other data conditions.
Fields without data are hidden unless Always Show is enabled.
See field details for more information.

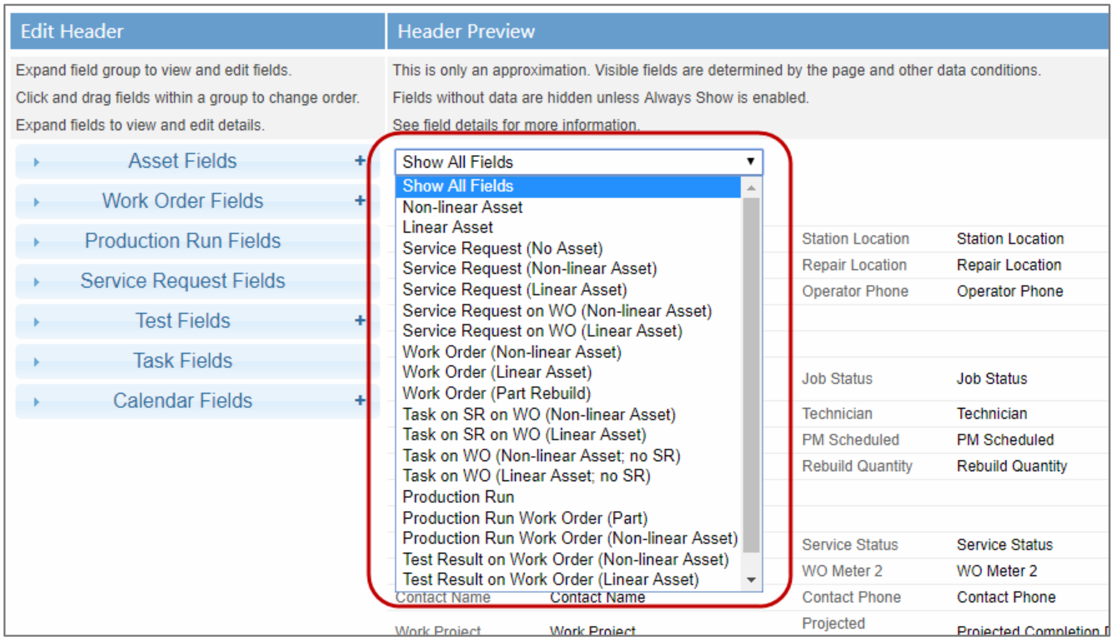
Show All Fields

Asset ID	Asset ID		
Asset Number	Asset Number	Station Location	Station Location
License Number	License Number	Repair Location	Repair Location
Operator Name	Operator Name	Operator Phone	Operator Phone
Part ID	Part ID		
Work Order ID	Work Order ID		
Multi-asset Work Order ID	Multi-asset Work Order ID	Job Status	Job Status
Job Type	Job Type	Technician	Technician
PM Service	PM Service	PM Scheduled	PM Scheduled
Restock Location	Restock Location	Rebuild Quantity	Rebuild Quantity
Current Stage	Current Stage		
WO Linear Position	WO Linear Position		
Work Delay	Work Delay	Service Status	Service Status
WO Meter 1	WO Meter 1	WO Meter 2	WO Meter 2
Contact Name	Contact Name	Contact Phone	Contact Phone
Work Project	Work Project	Projected Completion Date	Projected Completion Date
Title	Title	Parent Multi-asset WO ID	Parent Multi-asset WO ID

Because not all fields or contexts are available at the same time, use contexts to preview for different fields. For example, the user can see what the header will look like for the Task Detail page, on a Service Request, on a Work Order, for an Asset. You can see different possible preview options as describe below.

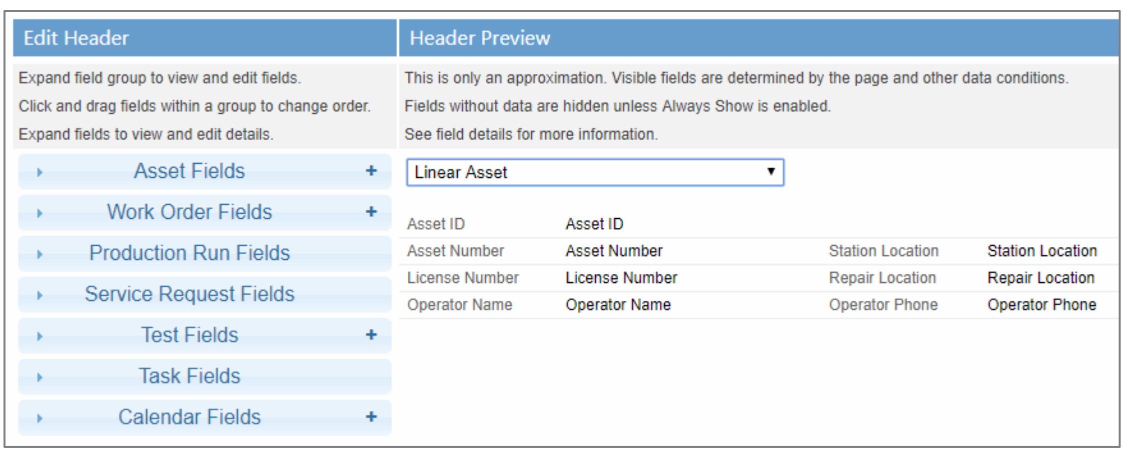
To see possible header preview options:

1. In the Header Preview section, click in the drop-down menu that displays **Show All Fields**.



2. Select the option to preview.

   The selected Header Preview displays.

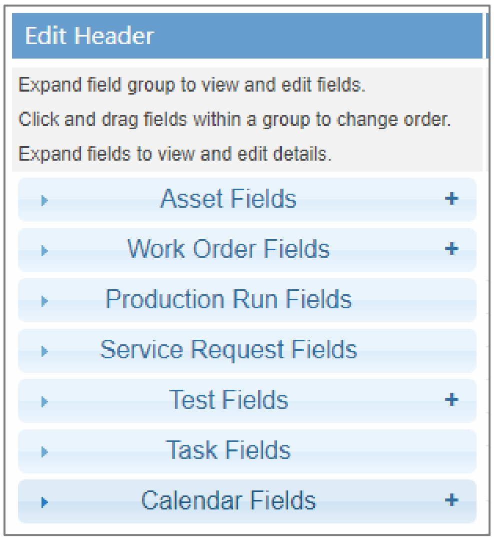


Note that this is just a rough approximation, as the data itself may drive what fields are displayed. For example, meter information is determined by the meters class defined for the asset. If the asset has no meters defined, then the meter fields will be hidden. Another example is PM service which will, by default only show for work orders that define a PM service value.

Edit Header

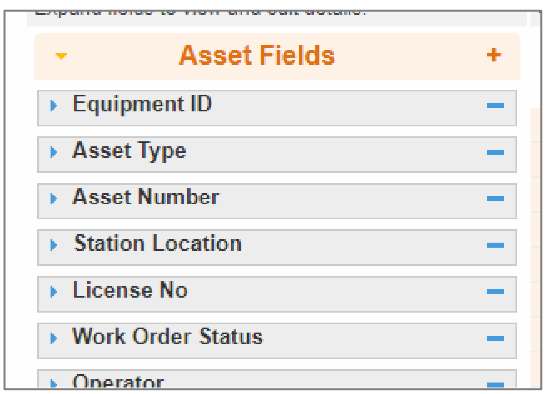
The Edit Header section shows an accordion menu with each Context that the header supports.

1. Click on a context (field group) to view and manage the fields within that group. For example, the **Asset Fields** context shows all fields that are specific to assets (typically meaning fields available in EQ_MAIN and EQ_MAIN_ADDL tables, though not all columns are supported at this time).

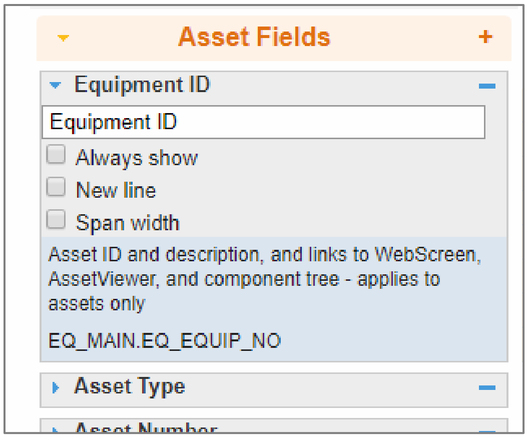


2. Click the Field Group to view and manage the fields within that group

The fields within the selected field group display.



3. For each field, click the arrow icon to expand field details.



The following information displays:

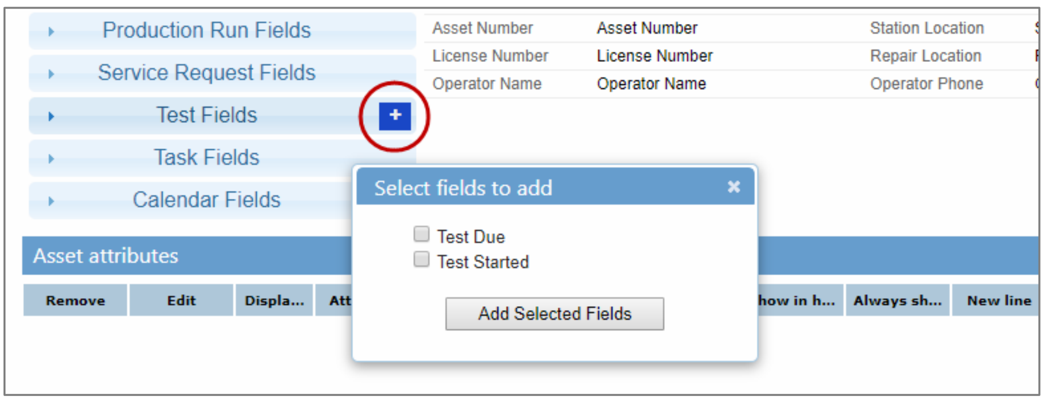
- Current field label text
- New field label text (textbox)
- **Always show** checkbox option
  - Checking this means the field will show even if value is empty or blank. Otherwise, field will only show if data is present.
  - Note that, unlike other changes, this option will not be preview-able because the preview always shows all fields already (since there is no live data to drive the header during editing). To see the results of "Always show" you must save the header profile and view the header on a page with actual data.
- **New line** checkbox option
  - Checking this means the field will always be in the left-most column and will not wrap via flow layout like default behavior does.
- **Span width** checkbox for option
  - Checking this means the field will span the width and occupy the entire row.
- Brief description of field, its context, and any special rules.
- List of database table names and column names that are queried to get the value of this field.

Regarding field order

- Fields can be re-ordered via click and drag.

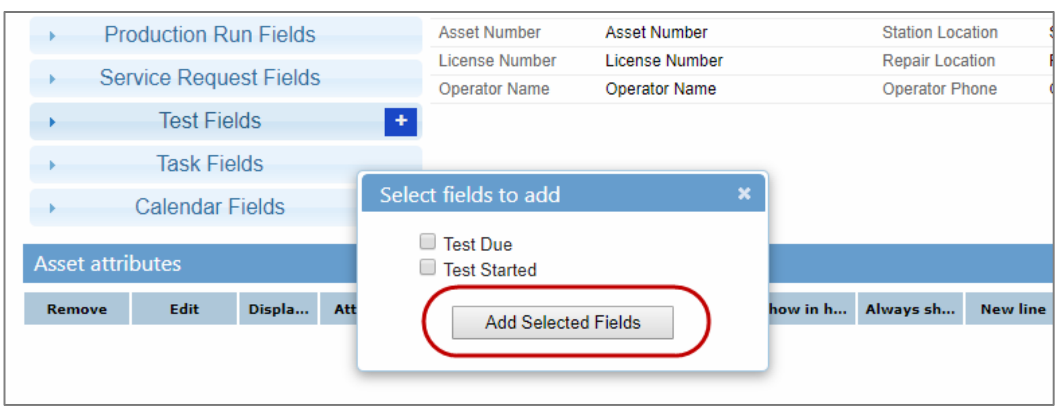
- Field groups are fixed and cannot be reordered. Fields will be ordered relative to the field group (context) in which they occur. For example, it is not possible to move work order-level information above asset-level information.
- Fields can be re-named, and other properties modified, via editing the details information. Renaming applies only to the current profile, and can be used, for example, to show manufacture year instead of model year based on asset type ID.
- Fields can be added or removed via the plus or minus buttons. Following is an example of adding fields to the header.

    i. Click the **+** to open the **Select fields** to add dialog.



    ii. Check the box next to the fields to add.

    iii. Click **Add Selected Fields** to add the fields to the header profile.



The new fields display in the Header Preview area.

    iv. At the bottom of the page, click **Save** to save your additions.

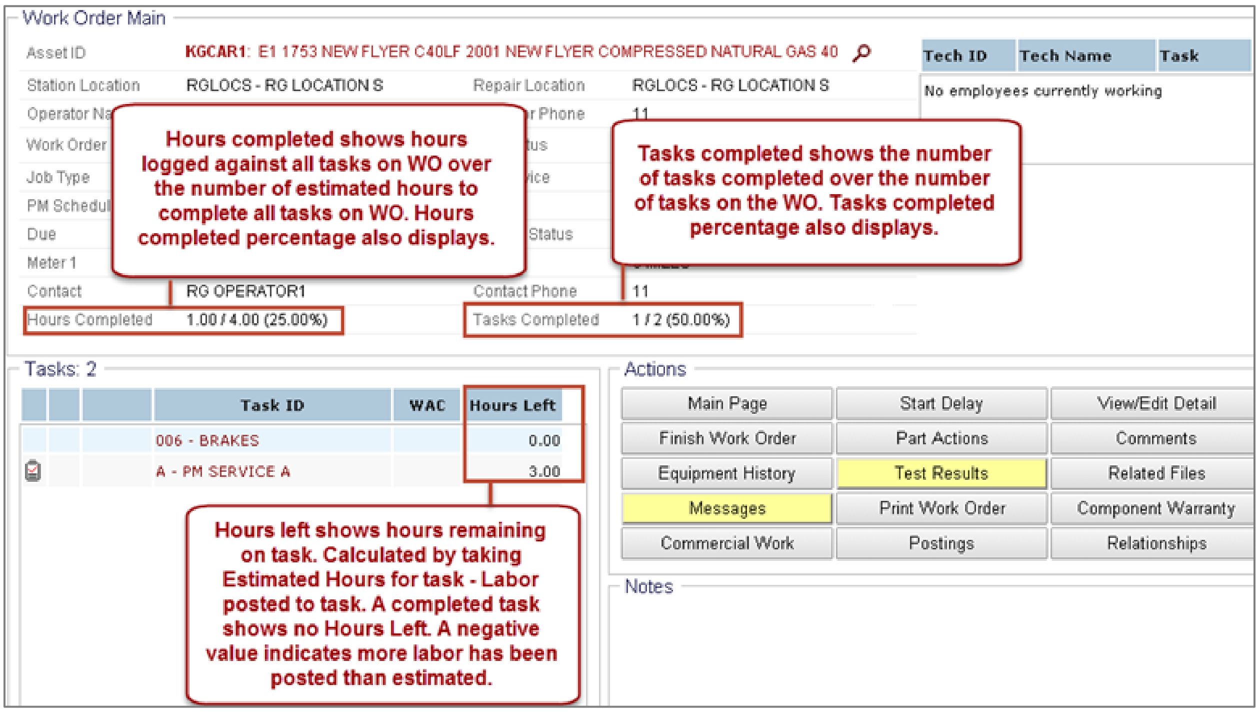
Regarding label text

Field's label text can be overridden, but defaults from corresponding user interface (UI) controls. For information about modifying UI controls, please refer to the *Administrator Guide*.

Other Fields

Hours Completion and Work Completion are not defaulted to display but once you have added them, they will display in the list.

When you add fields to the Work Order Header, the Work Order Main page will display the fields in the header. The **Remaining Hours** column in the Tasks section shows the hours left on the task as indicated in the screenshot below.



Hours Completed: Total posted time of all tasks on work order/Total of all the estimated hours for the tasks on the work order.

Tasks Completed = Number of completed tasks on the work order / Number of tasks on the work order. (Percentage Completed is also shown for Hours Completed and Tasks Completed.)

Note**:** If there are no estimated hours for the tasks, the label will be hidden.

To determine the total hours to complete the work order for each task, it takes the hours logged against the task and the estimated hours and it uses the ***greater*** value for the particular task. In the example above, if you estimated 1 hour for the BRAKES task and it ended up taking 2 hours, it will update the total to 5 hours (Hours Completed would read 2/5).

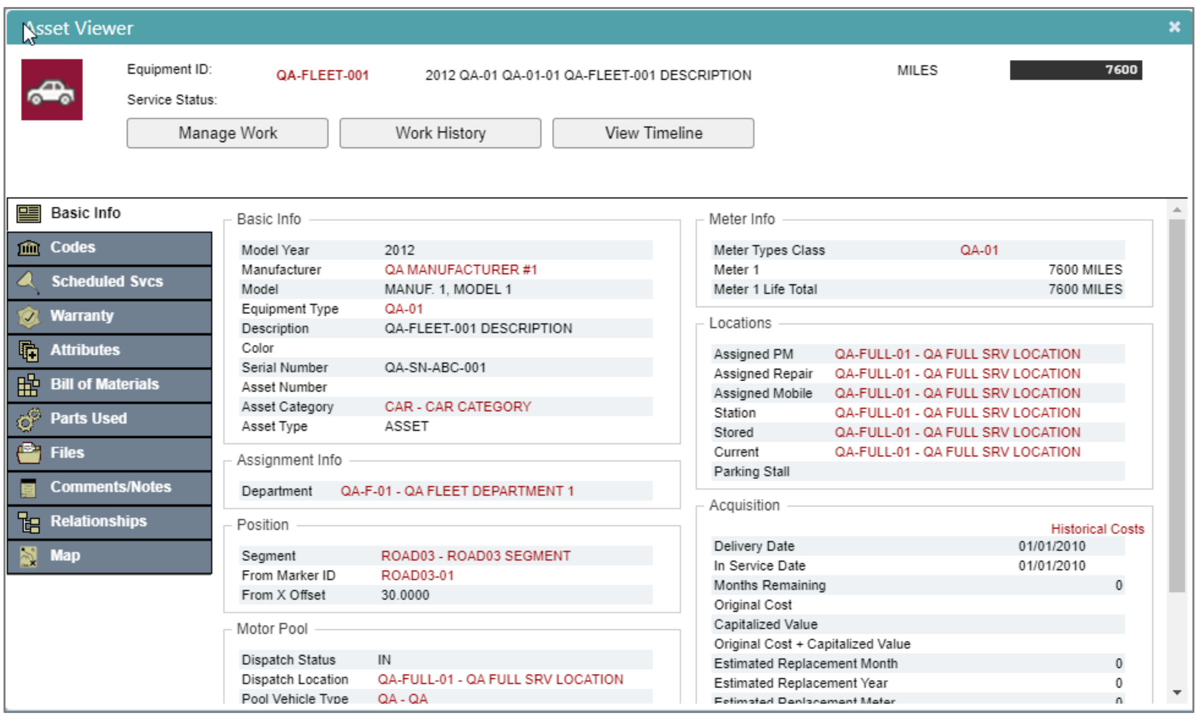
- Fields that show a lock icon instead of a minus button are required for that context and cannot be removed. However, they can still be reordered via click and drag.

Asset Viewer

Use the Asset Viewer section to edit which information to display in the asset viewer. Functionality works the same as the sections above. Check the boxes along the left side to choose whole tabs and sections to display and use the drop-down area in the middle to choose specific fields.

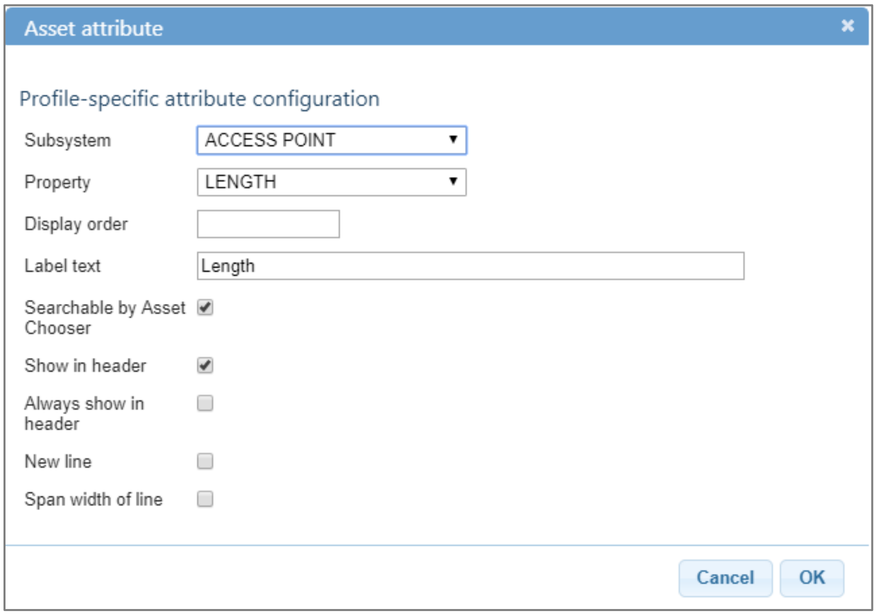
Note: Fields in the Asset Viewer will still only show as available for assets. For example, the Map tab only displays for assets that are geolocatable, and fields related to linear assets will not display on non-linear assets.

Note: Existing profiles will not be updated and must be configured manually as needed. The Default profile has all fields enabled and will not change the current settings for the Asset viewer.



Asset Attributes

Add asset attributes in this section. Click **Add Attribute** to open the Asset Attribute pop-in, add details, and save the attribute.

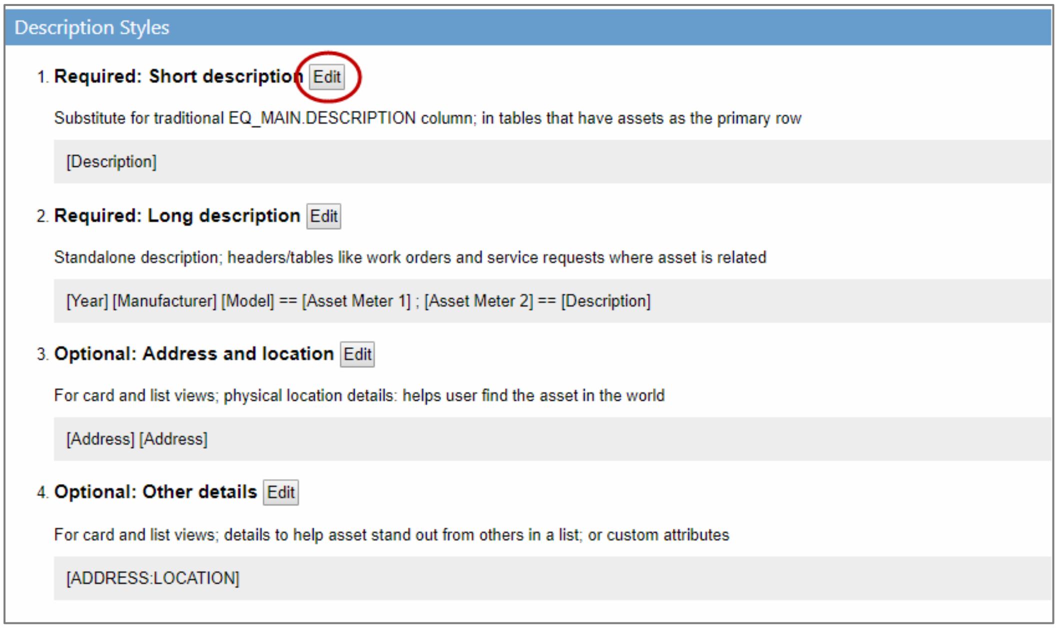


Description Styles

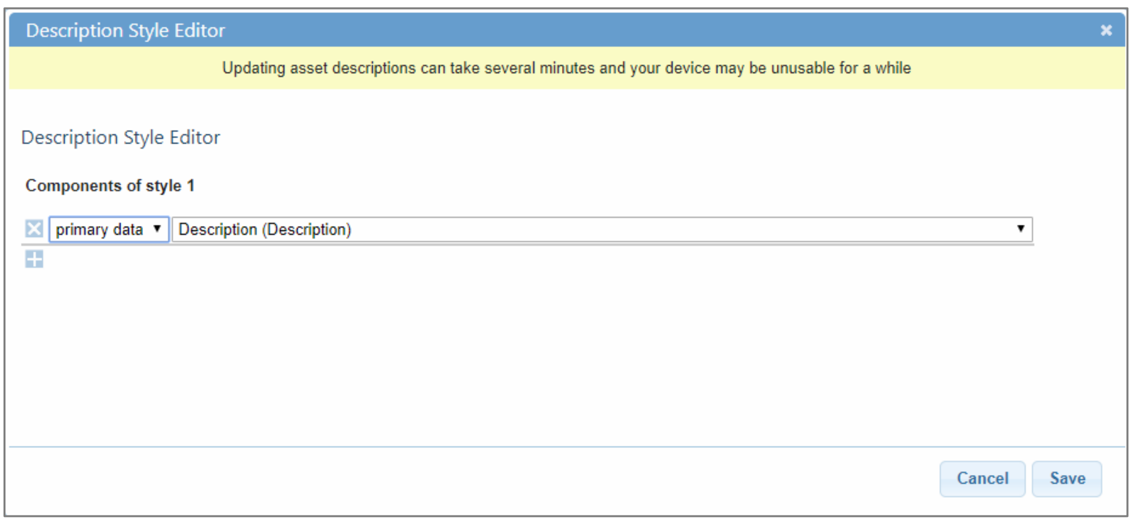
You can edit description styles to match the needs of your organization. Descriptions are built as components, like labels and data values. There are four description styles used throughout the system. Edit each of these to match your organizational needs.

To define a description style:

1. From the Asset Profile Detail page, find the description you want to edit and click **Edit**.

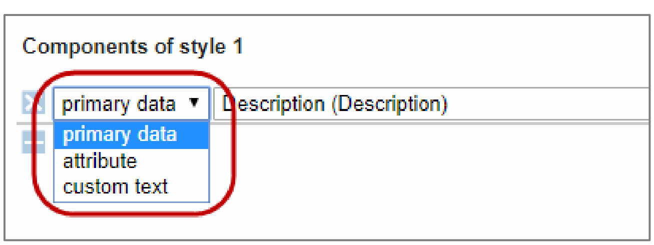


The Description Style Editor displays.



2. Build the style with the needed components.

   i. In the drop-down, select the component. Options include primary data, attribute, and custom text.

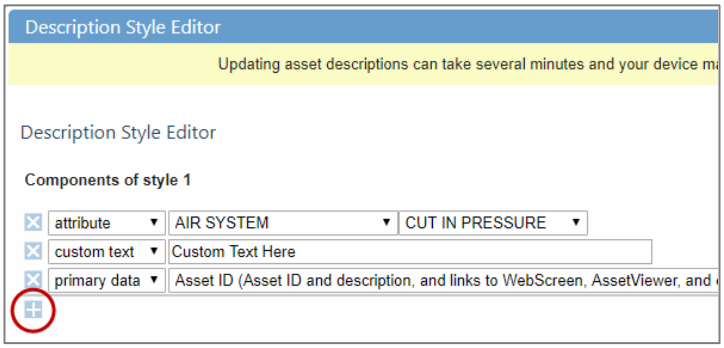


   a. **Primary data:** These are primary fields such as address, asset ID, serial number, etc.

   b. **Attribute:** Asset attributes. Refer to help for more information.

   c. **Custom text:** Any needed custom text in the description.

ii. To add another level, click the plus button.



iii. When you are done adding items, click **Save**. Or at any time, click **Cancel** to leave the editor and return to the detail page.

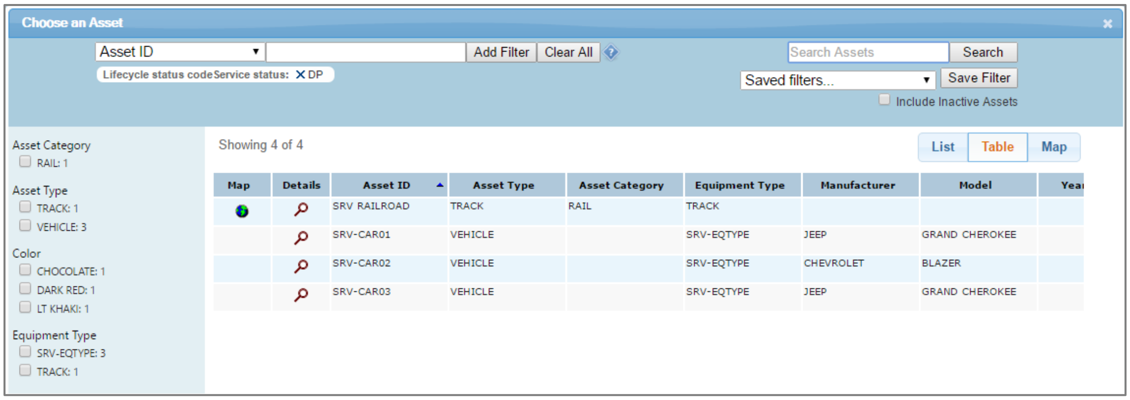
View Data Prep Assets

The **View Data Prep Assets** button allows you to view assets with a life cycle status code of DATA PREP. Data prep is a status for newly created assets. The data prep status is useful when rapidly entering newly-acquired assets, and for cases where some other person in the organization may need to review the assets before they become active. For example, an asset needs cost information, assignments, or any other details that are necessary before the asset goes into service and begins its maintenance schedule. You can assign newly created assets to have the DATA PREP status by default in the New Asset Wizard Options section when setting up the Asset portal.

To view assets with a DATA PREP status:

Click the **View Data Prep Assets** button. This button is found on the main Asset portal page, or the Create New Assets From a Template page.

The Asset Chooser displays with the assets that currently have the status code of DATA PREP.

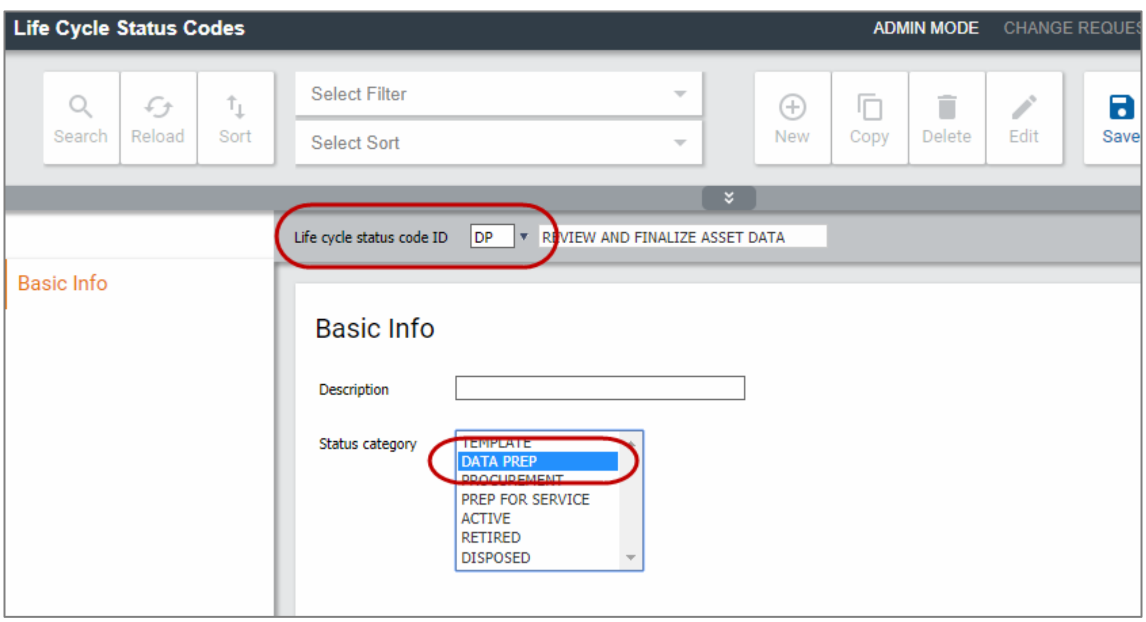


You can narrow down the list to find a particular asset, or a group of assets using the Search Assets field, the checkboxes to the left, or filter search fields.

If needed, save the filter using the **Save Filter** button. This saves the filter to the Asset Chooser which can be used in any portal that uses the Asset Chooser.

Life Cycle Status Codes

Life cycle status codes are created in the Life Cycle Status Codes screen. The codes track the status of fleet equipment, rail equipment, stationary equipment, components, and linear assets through their entire life cycles, from ordering to disposition. For the Asset portal, the most used code from this screen is DATA PREP, as discussed above.



To check the life cycle status code:

Open the Primary Information screen for your type of asset (for example, Asset Primary Information or Linear Assets – Primary Information).

Search for asset you need to check.

On the Status Tab, check the code in the **Life cycle status code ID** field.