

Version 25



Trapeze

Enterprise Asset Management

Capital Asset Management

Configuration Guide

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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://ftp.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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Version 25.x

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1. Overview

Managing the life cycle of assets is an important objective to any organization. Knowing when to replace an asset at the optimal point in its life cycle, and effectively managing the procurement and disposal process can help an organization get the most out of its assets for the least total cost. The Capital Asset Management (CAM) application is specifically designed to help asset managers do their job more efficiently and economically.

The CAM MAXQueue services send data to, and request data from, the main CAM application REST services. There are currently seven different MAXQueue interface services that perform basic data manipulation to make the data more generic for the CAM system.

- CAM Import service is used for importing created or updated equipment units done in CAM to the internal system.
- CAM Export server is used for exporting equipment units updated or created in the internal asset management system to CAM.

History and maintenance data relating to an equipment unit are performed in five other MAXQueue services:

- CAM – Capital History: Extracts capital history data from the internal asset system to CAM from a specific date range.
- CAM – Downtime: Sends downtime data from the internal the asset system to CAM.
- CAM – Energy: Sends fuel ticket data from the internal asset system to CAM.
- CAM – Meters: Sends meter data for an asset (as they are updated from various sources) from the internal asset system to CAM.
- CAM – Maintenance: Sends maintenance cost data from the internal asset system to CAM.

2. Setup

Use the following setup information to set up the base CAM information.

Requirements

The following items are required to use the CAM services.

MAXQueue

- Install MAXQueue base
- Install MAXQueue.CAM.dll
- Install CAM MAXQueue packages
- Configure each MAXQueue CAM interface service

System Configuration

The following items must be set up to use this interface.

Shared Variables

Each interface has their own set of variables that need setting up. However, the following items are shared variables that may already be configured for an interface (if they were set up for previous CAM interfaces).

Instance Variables

Variable	Value
vars.Company	Enter a unique company name
vars.FAUser	Enter the internal system user (used by MAXQueue for internal system posting)
vars.FAPass	Enter Password for internal system User
vars.ODBCName	Enter valid ODBC Name
vars.ODBCUser	Enter valid ODBC User
vars.ODBCPassword	Enter valid ODBC User Password
vars.Company	Enter valid CAM company name
vars.DebugLogLevel	CAM Asset Import Endpoint URL

Customizing the last run date

The following CAM MAXQueue interfaces can have their last run date customized:

- CAM Import
- CAM Export
- CAM – Maintenance
- CAM – Capital History

The last run time can be overwritten by creating a specific account ID, as indicated in their respective sections below. Each account ID can have the **Other 1** and **Other 2** values (as found in the External Identifiers tab of the Account screen) changed to indicate if a custom date is to be used. Set the **Other 1** to **Y**, and **Other 2** to either blank (the earliest possible date) or to a specified date (with the format M-D-YYYY, for example 1-20-2019).

After each run of the interface the account's **Other 2** field is updated with the last run date. If the **Other 1** field has been changed to **Y**, it is then changed to **N** after the successful completion of the first batch run. The system uses the run time value stored in maxq_staging.EventDetail for each successive run. If multiple records are found in maxq_staging, the system uses the oldest run time and then deletes all remaining maxq_staging records with the appropriate EventType value.

AccountsADMIN MODECHANGE REQUEST

 Search

 Reload

 Sort

Select Filter

Select Sort

 New

 Copy

 Delete

 Edit

Row #	Account ID	Name
1	CAM ASSET EXPORT LAST RUN DATE	CAM ASSET EXPORT LAST RUN DATE
2	CAM ASSET IMPORT LAST RUN DATE	CAM ASSET IMPORT LAST RUN DATE
3	CAM CAPITAL HIST LAST RUN DATE	CAM CAPITAL HIST LAST RUN DATE

Basic Info

External Identifiers

Account ID

CAM ASSET EXPORT LAST RUN DATE

CAM ASSET EXPORT LAST RUN DATE

External Identifiers

External account identifier

External credit account

External debit account

Entity

Fund

Organization

Account

Project

Program

Source

Other 1

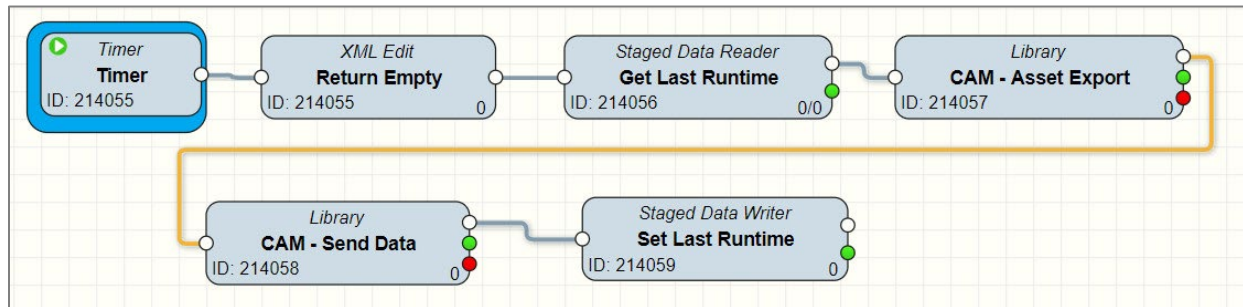
Other 2

N

12-05-2019

3. Asset Export

This service runs periodically depending on the last time it was run. This service exports new or updated assets from the internal system. This interface extracts new or updated assets from the internal asset management system in one-month batch increments and brings them into the CAM interface. This is done using the custom start date with CAM ASSET EXPORT LAST RUN DATE account ID.



Data Sent to CAM

XML Tag	Internal Database	Notes	Order
BatchID	NA	Date Time Stamp for batch	1
Company	NA	MAXQueue setting: vars.Company	2
Username	NA	MAXQueue setting: vars.CAMUser	3
PublishToErrorQueue	NA	Always false	4
AcquisitionDate	eq_main.delivery_date		5
AssetRowID	NA	Always blank	6
UnitID	eq_main.row_id		7
UnitNumber	eq_main.Eq_Equip_no		8
BookAmount	NA	Always blank	9
Category	Derived from vars.CategoryAssetObjName referencing desired EQ_MAIN column. Default: BenchmarkingClassType		10
DispFinalDate	eq_main.sale_date		11

XML Tag	Internal Database	Notes	Order
DispStatus	eq_main.procst_proc_status		12
DomicileLocation	eq_main.loc_station_loc		13
InServiceDate	eq_main.In_Service_Date		14
MaintenanceLocation	eq_main.Loc_Assign_Repr_Loc		15
OwningDepartmentEffectiveDate	eq_main.delivery_date		16
OwningDepartmentNumber	eq_main.dept_dept_code		17
UsingDepartmentEffectiveDate	eq_main.delivery_date		18
UsingDepartmentNumber	eq_main.dept_pm_notify_dept		19
SerialNumber	eq_main.serial_no		20
SpecNumber	eq_main.Eqtype_Equip_Type		21
Manufacturer	eq_main.manufacturer		22
Model	eq_main.model		23
Year	eq_main.year		24
FAPmClass	eq_main.class_class_pm		25
FAStandardsClass	eq_main.class_class_stds		26
FARentalClass	eq_main.class_class_rental		27
FAResourcesClass	eq_main.class_class_shop_sch		28
FAStoredLocation	eq_main.loc_stored_loc		29

Configuration

Configure the Variables

In MAXQueueDesigner on the Settings tab, create (or verify if they already exist) the following variables:

Instance Variables

Variable	Value
vars.AssetExportURL	CAM Asset Export Endpoint URL
vars.CategoryAssetObjName	Object Name as found in the UI Ctrl Info popup dialog. Only controls residing in the EQ_MAIN table maybe used on the Asset screen (2424). If this variable has not been configured in MAXQueue settings or is empty, the BenchmarkingClassType object name is used by default to populate CAM Category value.
vars.CAMUser	CAM User ID
vars.AuthCode	CAM Authorization code
vars.TestON	Set this to Y to turn the test on. This setting is specifically for Asset Import interface. When enabled, it logs the requests set to CAM and responds if vars.DebugLogLevel = 3. This is defaulted to N (disabled).
vars.CAMAssetExportAccount	Account ID for overwriting last run date. Value: CAM ASSET EXPORT LAST RUN DATE
vars.CategoryAssetObjName	Object Name as found in the UI Ctrl Info popup dialog. Only controls residing in the EQ_MAIN table maybe used on the Asset screen (2424). If this variable has not been configured in MAXQueue settings or is empty, the BenchmarkingClassType object name is used by default to populate CAM Category value.

Configure the Adapters

Timer: This setting determines how often the service runs.

Additional Setup

Account IDs: Use the Account Primary Information screen to set up accounts with the following IDs if customized run dates are needed.

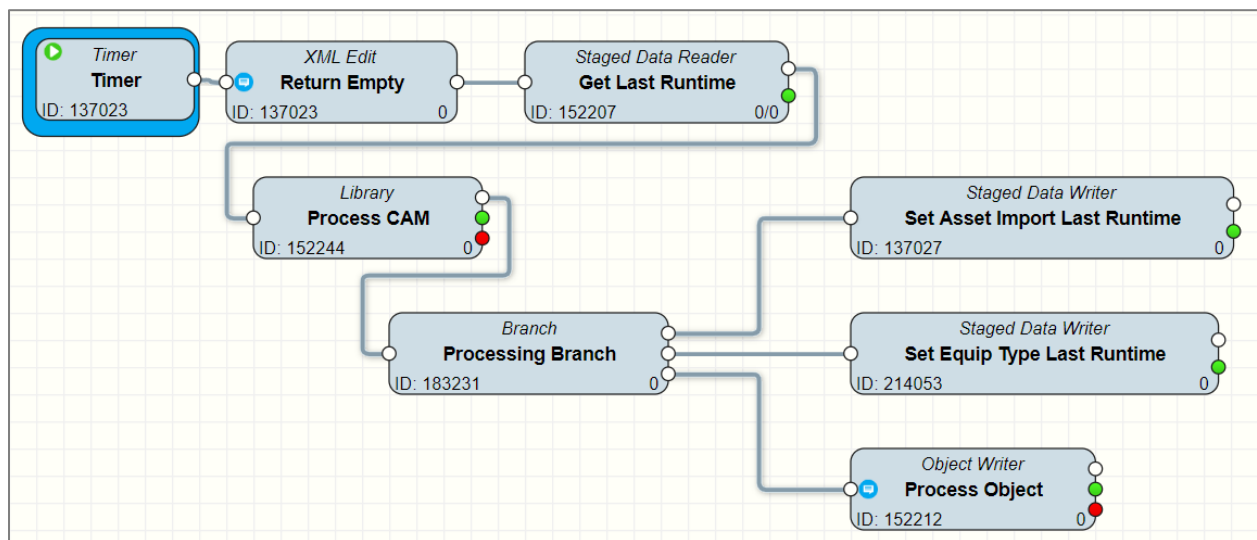
- CAM ASSET EXPORT LAST RUN DATE

4. Asset Import

This service runs periodically depending on the last time it was run. Once this service runs, it then contacts two CAM endpoints.

- The first endpoint verifies if any equipment types and their properties have been created since the last runtime.
- The second endpoint verifies if any assets and their attributes have been created since the last runtime.

If equipment types or assets have been created in CAM, the integration sends those assets to the internal system to be created or updated.



Notes

- ⚠ Do not include a Pool Vehicle Type. Creating assets with a department ID that has the Motor Pool option enabled fail without a Pool Vehicle Type set.
- The Asset Import interface does not process assets types of component.
- If a new equipment type is created in the internal system but fails, all assets that use the expected equipment type will fail too.

Configuration

Configure the Variables

In MAXQueueDesigner on the Settings tab, create (or verify if they already exist) the following variables:

Instance Variables

Variable	Value
vars.EquipTypeImportURL	CAM Equipment Type Import Endpoint URL
vars.AssetImportURL	CAM Asset Import Endpoint URL
vars.CAMUser	CAM User ID
vars.AuthCode	CAM Authorization code
vars.TestON	Don't request Asset and Equipment Type data from CAM web endpoints, but read the xml data found in \MAXQueue\DataFiles\FaEquipTypeImportResponse.xml and \MAXQueue\DataFiles\FaAssetsImportResponse.xml
vars.CAMAssetImportAccount	Account ID for overwriting last run date. Value: CAM ASSET IMPORT LAST RUN DATE
vars.CAMEquipTypeAccount	Account ID for overwriting last run date. Value: CAM EQUIP TYPE LAST RUN DATE

Configure the Adapters

Timer: This setting determines how often the service runs.

Additional Setup

Account IDs: Use the Account Primary Information screen to set up accounts with the following IDs if customized run dates are needed.

- CAM ASSET IMPORT LAST RUN DATE
- CAM EQUIP TYPE LAST RUN DATE

XML Attribute Actions

The following attribute actions work with the internal asset management system to communicate what the system should do with the information in that information point.



Note: All CAM attributes that become additional data in the internal system also appear on the Interface System of Record screen, and the actions work the same way.



Note: Two system-of-record records determine whether to create master records in the internal system at all. NEW FA ASSET and NEW FA EQUIPMENT TYPE become the respective interface's tags. If any action is used other than Insert, the internal side of the interface will not create a new record.

- **Insert:** The internal system uses the entered value when creating new records, but not use this value when updating an existing record. With this value, the internal system is the system of record.
- **Update:** The internal system uses this value when updating records, but not when creating a new record. With this value, CAM is the system of record. If this is left blank, the internal system data is set to null.
- **Insert/Update:** The internal system uses this value both when creating and updating records.
- **Ignore:** The internal system does not use the entered value at all. This action may be used when the data is not applicable to a particular asset, unit, component, etc., but the tag must be included for completeness.
- **None:** None means the tag does not apply. The effect of this action is the same as **Ignore**.
-

Asset Information

The following settings must be set with the necessary information, otherwise the interface could fail.

Setting/Field	Requirement
AssetType	Must be set with an asset type
MaintenanceClass	Class must exist in the asset management system with function: maintenance enabled
MeterTypesClass	Class must exist in the asset management system with function: meter types enabled
PMProgramClass	Class must exist in the asset management system with function: PM program enabled
RentalRatesClass	Class must exist in the asset management system with function: Rental rates enabled

Setting/Field	Requirement
StandardsClass	Class must exist in the asset management system with function: Standards enabled
DepreciationMethod	Method must be valid in the asset management system
DepartmentID:	Department must exist in the asset management system
DepartmentToNotifyForPM:	Department must exist in the asset management system
EquipmentDescription	Must have a description
EquipmentType:	Equipment Type must exist in the asset management system
AssignedPMLocationID	Location ID must exist in the asset management system
AssignedRepairLocationID	Location ID must exist in the asset management system
StationLocationID	Location ID must exist in the asset management system, must be provided if setting: Equipment Units Setup Options - 'Require Location ID for equipment units'
ManufacturerID	Manufacturer ID must exist in the asset management system
MeterDistanceType	Type must exist in the asset management system
MeterTimeType	Type must exist in the asset management system
ModelID	Must be a model for the manufacturer ID provided in the asset management system
DefaultPriorityIDForEquipment	Must be a valid priority ID in the asset management system
LifeCycleStatusCodeID	Must be a valid life cycle status code ID in the asset management system
SerialNumber	The asset must have a serial number
ModelYear	The asset must have a model year
Pool Vehicle Type	If department ID has the Motor Pool option enabled
CompanyCode	Must be provided if Require company ID for equipment units option on the Equipment Units – Setup – Options screen is enabled. The value provided must be a valid Company Code in the asset management system.
VendorID	If provided, must be a valid vendor ID in the asset management system
MotorPoolDispatchLocationID	Must be a valid location ID in the asset management system

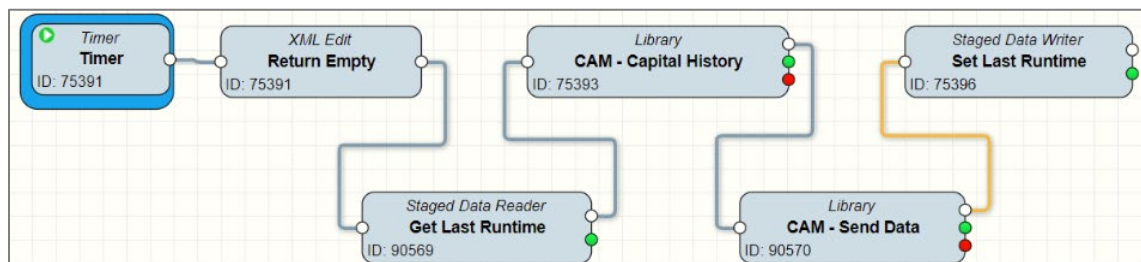
5. Capital History Update

This service sends capital history data from the internal asset management system to CAM. The data used for this transfer is from the Job Main table.

The interface extracts capital history data in seven-day increments, and sets the last run date seven days from the previous last run date.



Note: You can overwrite the last run date by creating an account ID on the Account Primary screen called **CAM CAPITAL HIST LAST RUN DATE**, then setting the **Other 1** and **Other 2** fields to either blank (to go back to the earliest possible date) or a specified date in the format MM-DD-YYYY.



Configuration

Configure the Variables

In MAXQueueDesigner on the Settings tab, create (or verify if they already exist) the following variables:

Instance Variables

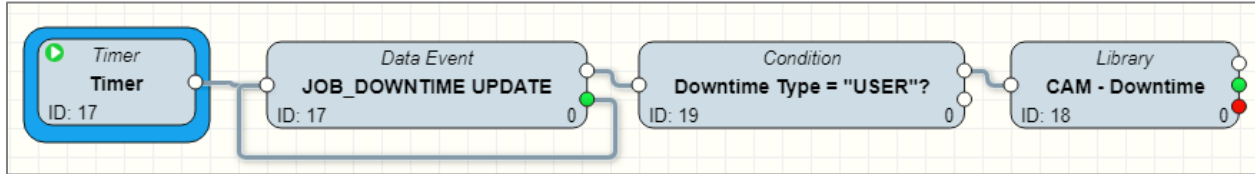
Variable	Value
vars.CapitalURL	CAM Capital History Endpoint URL
vars.CAMUser	CAM User ID
vars.AuthCode	CAM Authorization code
vars.TestON	'Y' - This setting is specifically for Asset Import interface, although when enable it logs the request set to CAM and responses if vars.DebugLogLevel = 3
vars.CAMCapitalHistoryAccount	Account ID for overwriting last run date. Value: CAM CAPITAL HIST LAST RUN DATE

Configure the Adapters

Timer: This setting determines how often the service runs. It is recommended to run this service on a weekly basis.

6. Downtime Update

This service sends downtime data from the internal asset management system to CAM. The data used for this transfer is from the Job Downtime table.



Configuration

Configure the Variables

In MAXQueueDesigner on the Settings tab, create (or verify if they already exist) the following variables:

Instance Variables

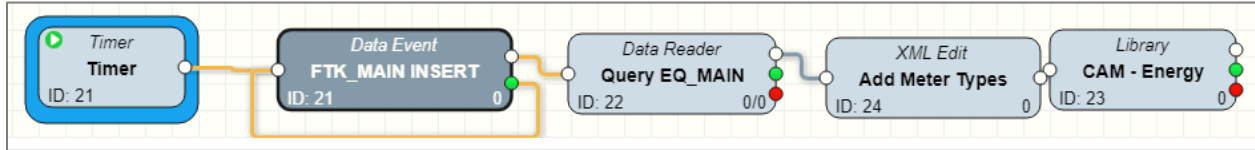
Variable	Value
vars.DowntimeURL	CAM Downtime Endpoint URL
vars.CAMUser	CAM User ID
vars.AuthCode	CAM Authorization code
vars.TestON	'Y' - This setting is specifically for Asset Import interface, although when enable it logs the request set to CAM and responses if vars.DebugLogLevel = 3

Configure the Adapters

Timer: This setting determines how often the service runs.

7. Energy Update

This service sends fuel ticket data from the internal asset management system to CAM. The data used for this transfer is from the Fuel Ticket Main table.



Configuration

Configure the Variables

In MAXQueueDesigner on the Settings tab, create (or verify if they already exist) the following variables:

Instance Variables

Variable	Value
vars.EnergyURL	CAM Energy Endpoint URL
vars.CAMUser	CAM User ID
vars.AuthCode	CAM Authorization code
vars.TestON	'Y' - This setting is specifically for Asset Import interface, although when enable it logs the request set to CAM and responses if vars.DebugLogLevel = 3

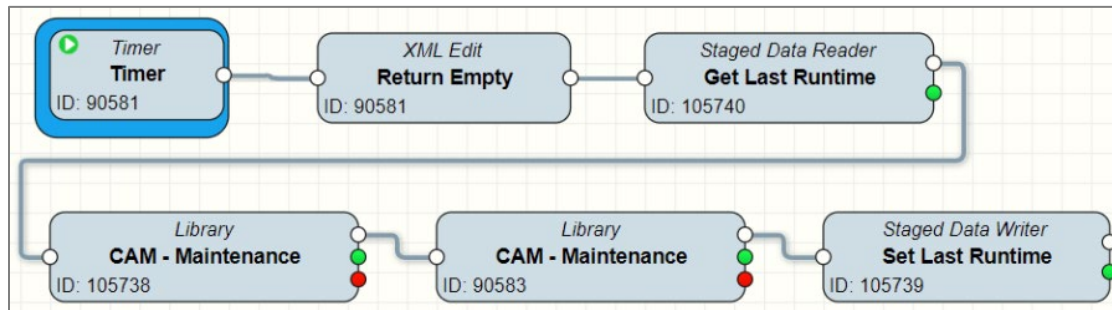
Configure the Adapters

Timer: This setting determines how often the service runs.

8. Maintenance Update

This service sends maintenance cost data from the internal asset management system to CAM. The data used for this transfer is from the Task Main table.

The interface extracts maintenance cost data in one-month increments and sets the last run date one month from the previous last run date.



Configuration

Configure the Variables

In MAXQueueDesigner on the Settings tab, create (or verify if they already exist) the following variables:

Instance Variables

Variable	Value
vars.MappingTypes	External Data Mapping Data Type
vars.MaintenanceURL	CAM Equipment Type Import Endpoint URL
vars.CAMUser	CAM User ID
vars.AuthCode	CAM Authorization code
vars.TestON	'Y' - This setting is specifically for Asset Import interface, although when enable it logs the request set to CAM and responses if vars.DebugLogLevel = 3
vars.CAMMaintAccount	Account ID for overwriting last run date. Value: CAM MAINT LAST RUN DATE

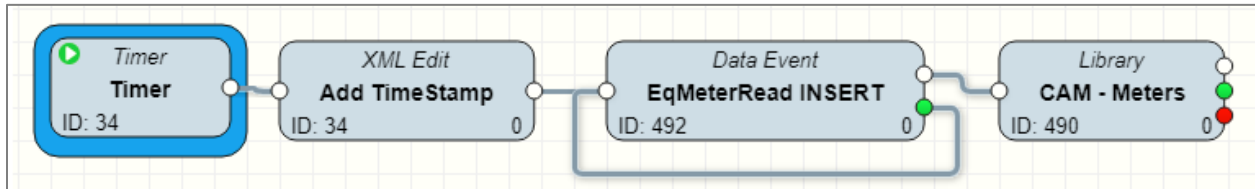
Configure the Adapters

Timer: This setting determines how often the service runs. It is recommended to set this interface to run once a month.

9. Meter Update

This service sends meter data from the internal asset management system to CAM. The data used for this transfer is from the Equipment Meter Read table.

The interface extracts maintenance cost data in one-month increments and sets the last run date one month from the previous last run date.



Configuration

Configure the Variables

In MAXQueueDesigner on the Settings tab, create (or verify if they already exist) the following variables:

Instance Variables

Variable	Value
vars.MetersURL	CAM meter Import Endpoint URL
vars.CAMUser	CAM User ID
vars.AuthCode	CAM Authorization code
vars.TestON	'Y' - This setting is specifically for Asset Import interface, although when enable it logs the request set to CAM and responses if vars.DebugLogLevel = 3

Configure the Adapters

Timer: This setting determines how often the service runs.