Version 25 | Trapeze Enterprise Asset Management

Customer Access

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.

Customer Access - Administrator and User Guide

Version 25.x

February 2025

Contents

1. Overview

The Customer Access Module is designed to provide your organization's maintenance department administrators with an easy to use, browser-based, real-time view into information regarding the vehicles and assets in their departments. It provides a link to enter service requests on vehicles, display assets assigned to the user's department, display open work orders for assets assigned to the user's department, and enter meter readings and usage tickets for assets. Deploying the Customer Access Module allows your organization to provide department administrators with immediate access to valuable information.

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.

Installation

Please refer to the *Administrator Guide,* **Install and Configure Web Modules** section for instructions on installing and upgrading Web Modules.

To make the functions of this module available to Web Modules users, add a tab to the Web Modules installation. Please refer to the *Administrator Guide,* **Web Modules Configuration - Adding Modules and Tabs** section for detailed instructions on adding new tabs and configuring security access for those tabs.

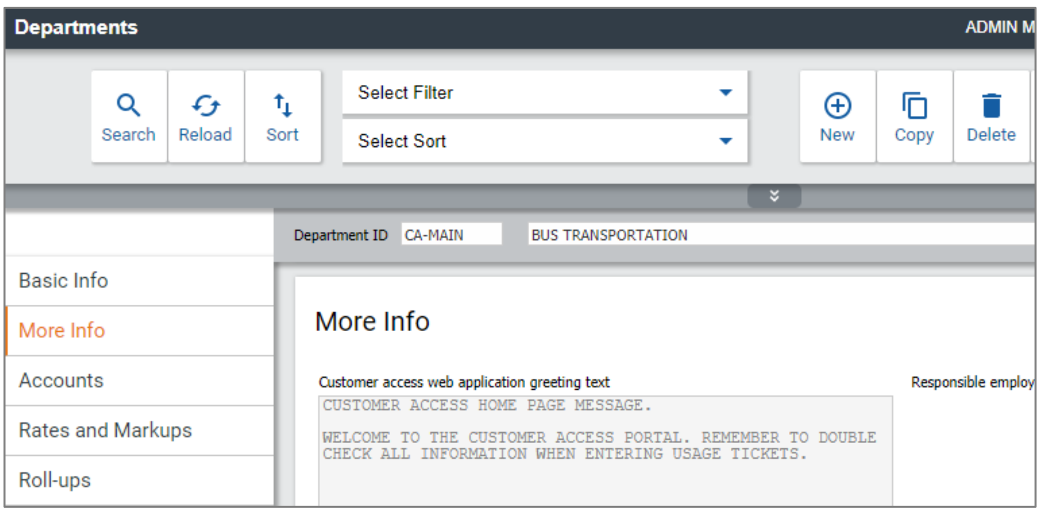
This module does not support anonymous access to all users. A user must be logged into web modules for this module to function.

2. Configure Customer Access

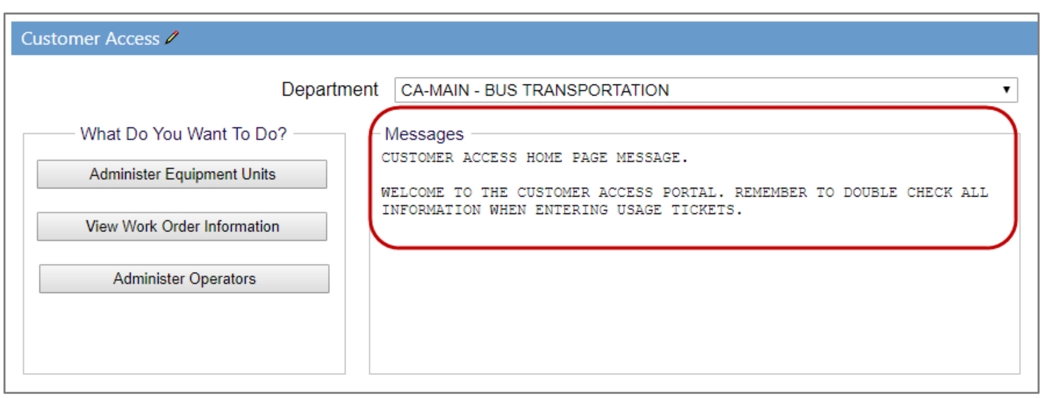
Configure the Customer Access module to best suite your needs. The module must be installed and must have a tab to open in the Web Modules. Use the below sections to configure the module itself and set up the Messages section that can display needed information for users when they open the Customer Access module.

To configure the Messages section:

1. Open the Departments Primary Information screen in the Enterprise Portal.
2. Search for the required record and click **Edit** to open that record for editing.
3. On the More Info tab, enter the message for the Customer Access portal main page.



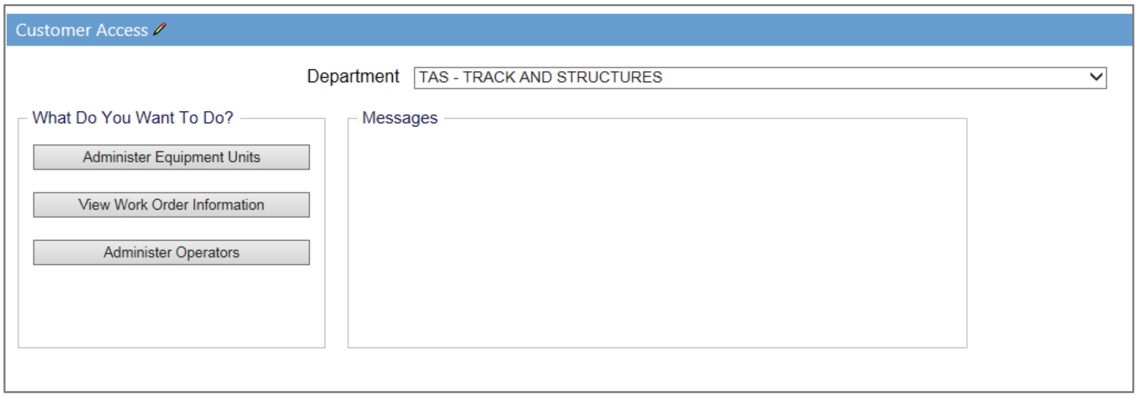
4. Click **Save**.
5. The information displays on the Customer Access portal for the department. You must log out and log in for this to update.



To configure the module settings:

1. Log in as an Administrator, and click the Customer Access tab.

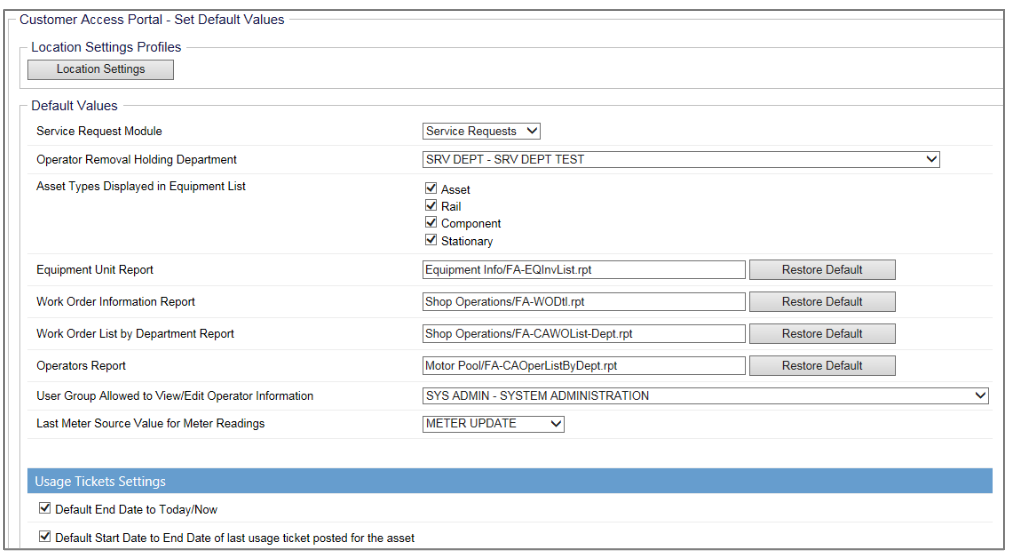
   The Customer Access Page displays.



   This module provides the maintenance department administrators with access to equipment, work orders, and operators assigned to their departments.

2. Click the pencil icon next to the Customer Access title bar.

   The Customer Access Portal – Set Default Values Page displays.



   This page is where you set up the various Default Values and Location Settings Profiles. For more information on individual settings, finish going through the sections below.

Location Settings Profiles

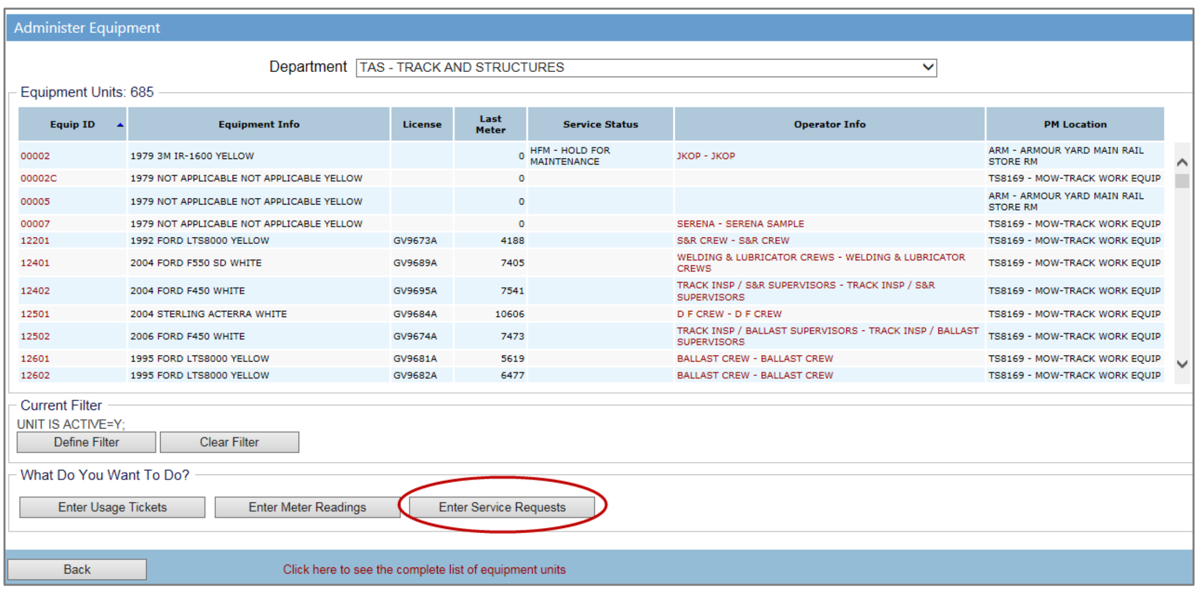
For information on setting up Location Settings Profiles, refer to *General Application Information: Section 2. Location Settings Profiles*.

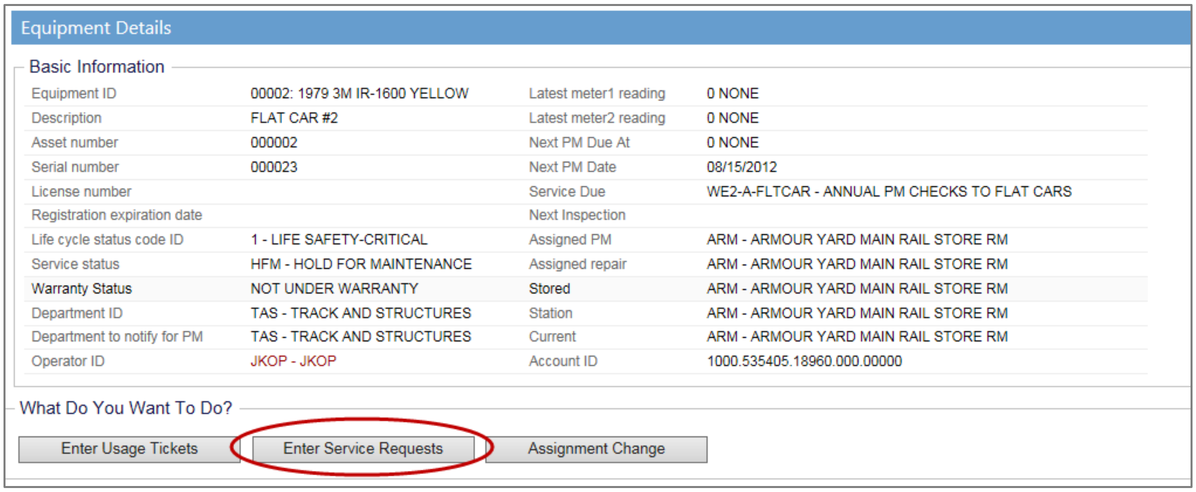
Default Values

The following section provides an overview of the various default values.

Service Request Module

To enter Service Requests, the Service Request Module must be installed. Refer to the *Installation and Access Guide* and the *Service Request Module Administrator Guide* for instructions on installing, upgrading, and configuring the Service Request module. Once you have installed, created a tab for, and configured the Service Request module, you may select the tab that has the Service Request module installed on it from the drop-down list. This default setting allows users to access the Service Request module by clicking the **Enter Service Request** button on the Administer Equipment and Equipment Detail pages as shown on the screenshots below.





Operator Removal Holding Department

Employees in the process of being transferred between departments are placed in a holding department until the system administrator officially changes their assigned department ID from the originating department to the new department. You may also assign users from the holding department to other departments. This default value specifies which department in the system has the function of holding area for employees in the process of being transferred. To set the default holding department, select the desired department from the drop-down selection box.

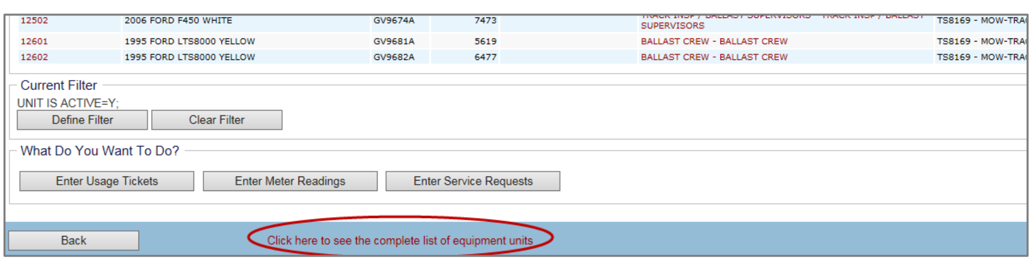
Asset Types Displayed in Equipment List

Check the type of assets to display in the Equipment List (asset, rail, component, and stationary). The default is Asset.

Equipment Unit Report

1. Enter the report name in this field to activate the link on the Administer Equipment page as indicated in the screenshot below.

   If customizing this report, please be aware of the following case sensitive parameters: Department and Asset.

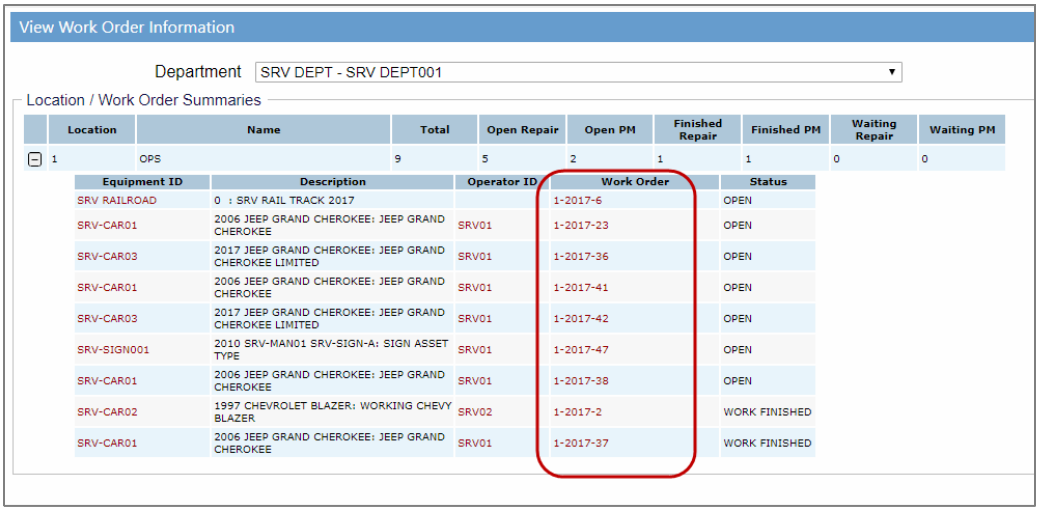


2. Click the **Restore Default** button to restore the setting to the default Equipment Unit Report.

Work Order Information Report

1. Enter the report name to activate the link to the Work Order Detail Report on the View Work Order Information page.

   If customizing this report, please be aware of the following case sensitive parameters: WONum, WOYear, and Location.



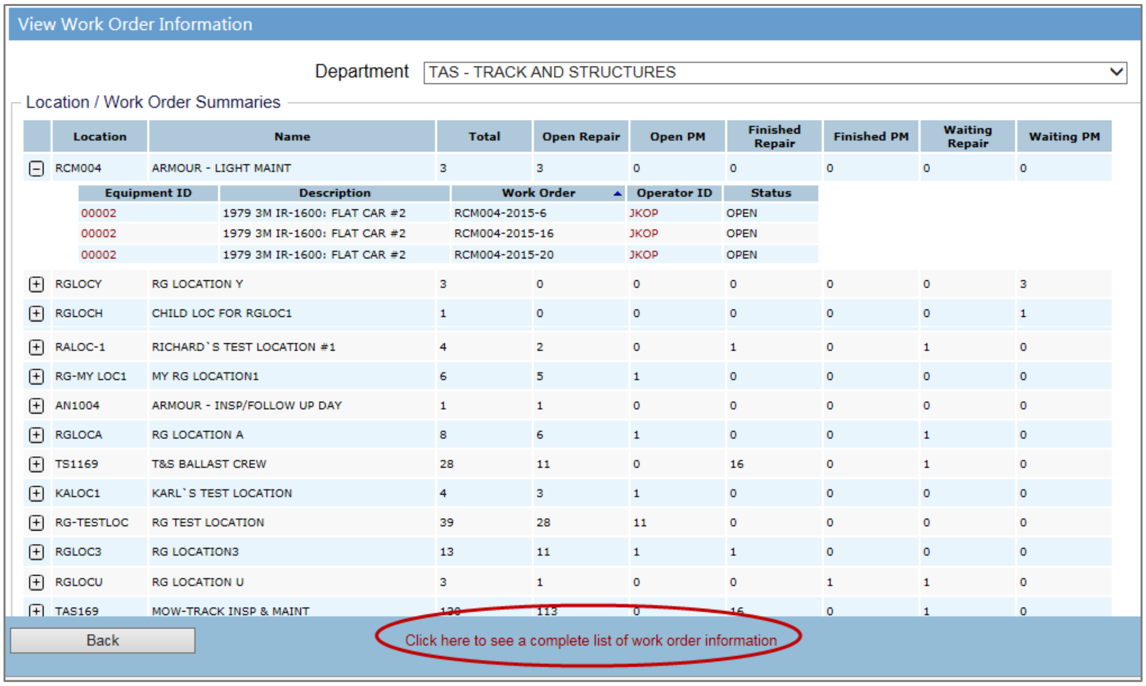
   Note: If you do not enter a valid report in this area, the work order will only be the work order number as shown above instead of a red link to the report.

2. Click the **Restore Default** button to restore the setting to the default Work Order Information Report.

Work Order List by Department Report

1. Enter the report name to activate the link to the Work Order List by Department Report on the View Work Order Information page as shown below.

   If customizing this report, please be aware of the following case sensitive parameters: DeptID and WOStatus.

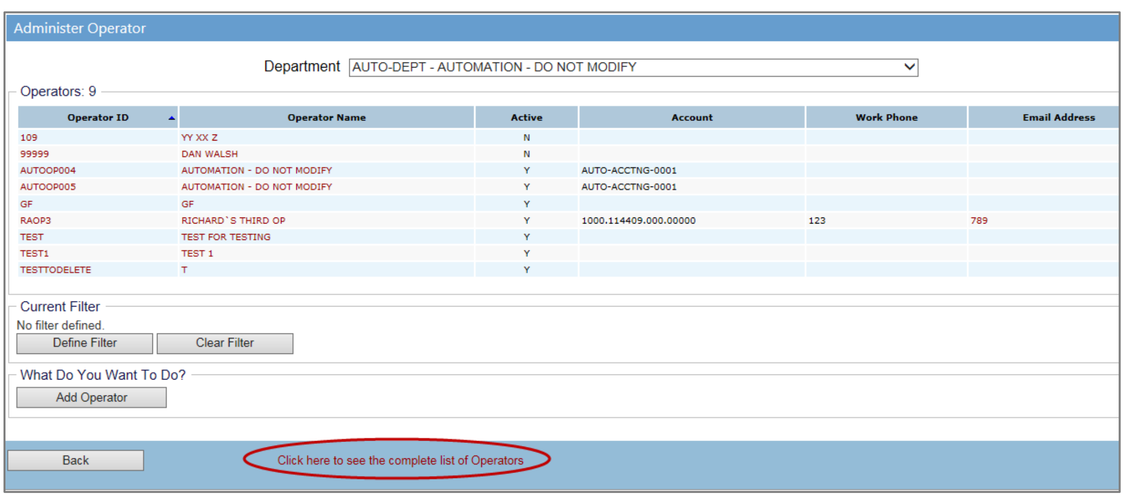


2. Click the **Restore Default** button to restore the setting to the default Work Order List by Department Report.

Operators Report

1. Enter the report name to activate the Operators Report link. This link can be found on the Administer Operator page as shown in the screenshot below.

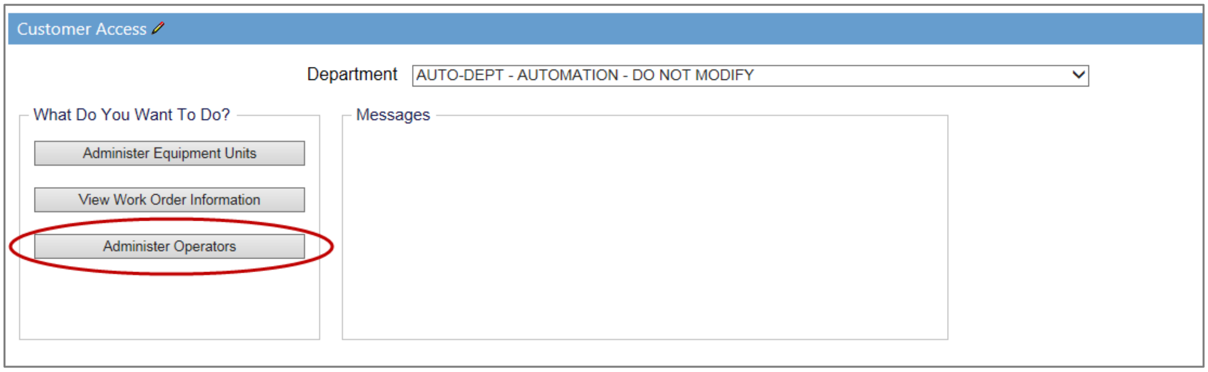
   If customizing this report, please be aware of the following case sensitive parameters: Departments and Asset.



2. Click the **Restore Default** button to restore the setting to the default Operators Report.

User Group Allowed to View/Edit Operator Information

This default setting determines whether a user group is allowed to view/edit operator information. If allowed, the user group is given access to an **Administer Operators** button on the Main Customer Access Page. Refer to the Administer Operator Page section below for more information regarding this page.



Last Meter Source Value for Meter Readings

This default setting determines the source for the last meter reading.

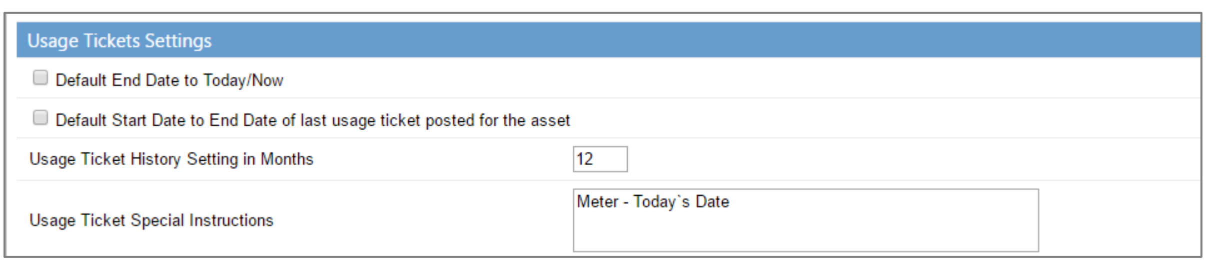
Allow users to view Closed work orders

Check this option to display closed work orders in the View Work Order Information page.

Display Soon Due PMs When Posting Usage or Meters

Check this checkbox to enable the pop-in that displays soon due PMs when saving usage tickets or meter readings.

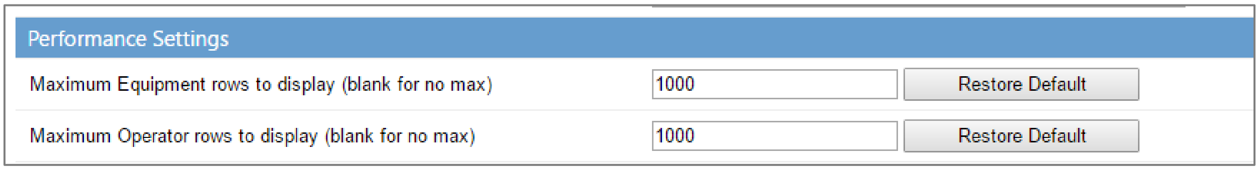
Usage Ticket Settings



- **Default End Date to Today/Now:** This default sets the end date to today when checked.
- **Default Start Date to End Date of last usage ticket posted for the asset:** When checked, this default sets the start date to the end date of the last usage ticket posted for the asset.

- **Usage Ticket History Setting in Months:** This setting allows you to determine how many months to display usage ticket history.
- **Usage Ticket Special Instructions:** To display special instructions for usage tickets, enter the instructions in the field provided and click **Save**.

Performance Settings



- **Maximum Equipment Rows to Display (blank for no max):** Enter a number in this field to determine a maximum number of rows to display.
- **Maximum Operator Rows to Display (blank for no max):** Enter a number in this field to determine a maximum number of operator rows to display.

Finishing Up

After you have configured the Customer Access module, be sure to click **Save** to save your changes. Then, exit your browser and open a new browser window prior to using the Customer Access tab to access equipment, work order and operator information, or to enter Service Requests, Meter Readings, and Usage Tickets.

MAXQueue and Notification Setup

MAXQueue and Notifications must be set up to run correctly.

To enable notifications for the Customer Access module:

1. Install and configure the MAXQueue base application.

   Refer to the *MAXQueue Installation, Upgrade, and Configuration Guide.*

2. Configure MAXQueue for Customer Access by following the instructions below. This includes setting up the MAXQueue variables in the MAXQueue Designer as instructed in the MAXQueue Variable Setup section.

3. Enable the following services.

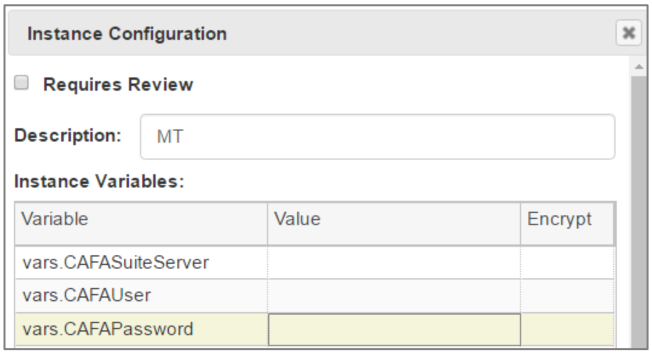
   - WF – Schedule PM Appt
   - Notification Rules

MAXQueue Variable Setup

To use the notifications, the correct variables must be configured.

To configure the variables:

1. Click the edit pencil to open the Instance Configuration pop-in.



2. Configure the instance variables. Click in the fields in the Value column to enter the information. The variables needed are as follows:

    - vars.CAFASuiteServer: Enter the URL to be user. This includes the local host name or IP address, and the application name. For example: http://[*LocalhostName*]/[*AppName*]
    - vars.CAFAUser: Enter the username for appointment creation
    - vars.CAFAPassword: Enter the user password for the appointment creation

3. Configure the following service variables.

    - vars.AttachCalendarToNotification: **Y** or **N**. If **Y**, then the notification will have calendar items attached to the notification. This allows the notification to send out an .ics file
    - vars.PickupPaddingMinutes: The number of minutes that the pickup will be scheduled after the work is scheduled to be completed.
    - vars.AttachCalendarOrganizer: The email address of the person who will organize the calendar.

4. When you are done editing the variables, close the pop-in and commit the changes.

5. Click the adapter called Configure Message and set the following vars.

    i. vars.SubjectTemplate

    ii. vars.MessageTemplate

To configure the subject and message template vars, use the following variables. These variables will gather the necessary information and insert them into the message as you have entered.

[DropOffDateTime]	[EstimatedHours]	[OperatorName]
[OperatorID]	[Phone]	[WOLoc]
[WOYear	[WONumber]	[TaskDescription]
[TaskID]	[LocationID]	[LocationName]
[EquipmentDescription]	[EquipmentID]	[TaskID]

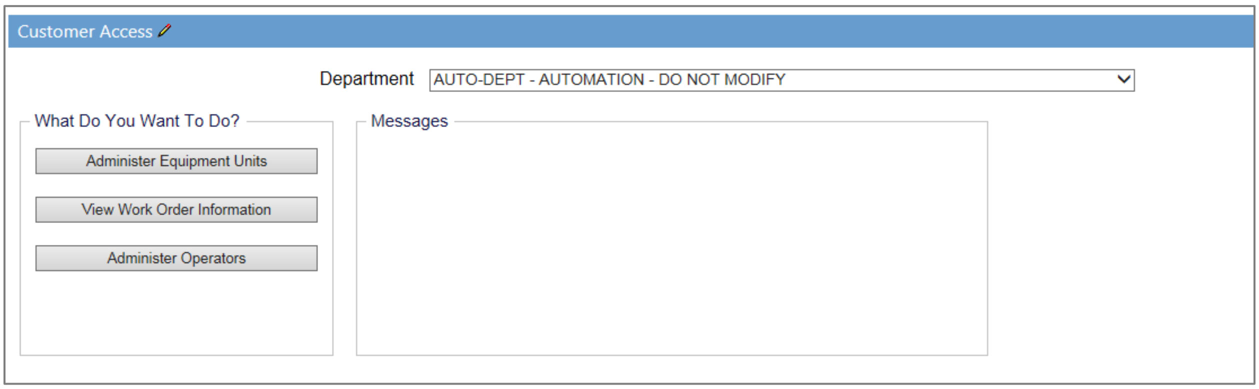
6. Once the subject and message templates are configured, close the adapter.

3. Understanding Customer Access

The Customer Access Module displays data that is based on the department code for the logged-in user's associated Operator ID. As such, in order for any data to be displayed to a user, the User's ID must have a valid associated Operator ID on the Users screen's Basic Info tab. Please see the Department section below for information on department association.

Main Customer Access Page

The Main Customer Access Page allows users to set their department and select the action they would like to perform.



Department

The Department drop-down box allows users to select the department to view information.

Department Drop-down

The drop-down selections are determined by the Department Administrator's Supported Departments list and Department ID on both the Operator and Employee screens.

What Do You Want To Do?

The What Do You Want To Do? section allows users to select from the following options:

Administer Equipment Units

The **Administer Equipment Units** button takes you to the Administer Equipment page. For more information about this page, see the Administer Equipment Page section below.

View Work Order Information

To go to the View Work Order Information page, click the **View Work Order Information** button. For more information about this page, see the View Work Order Information Page section below.

Administer Operators

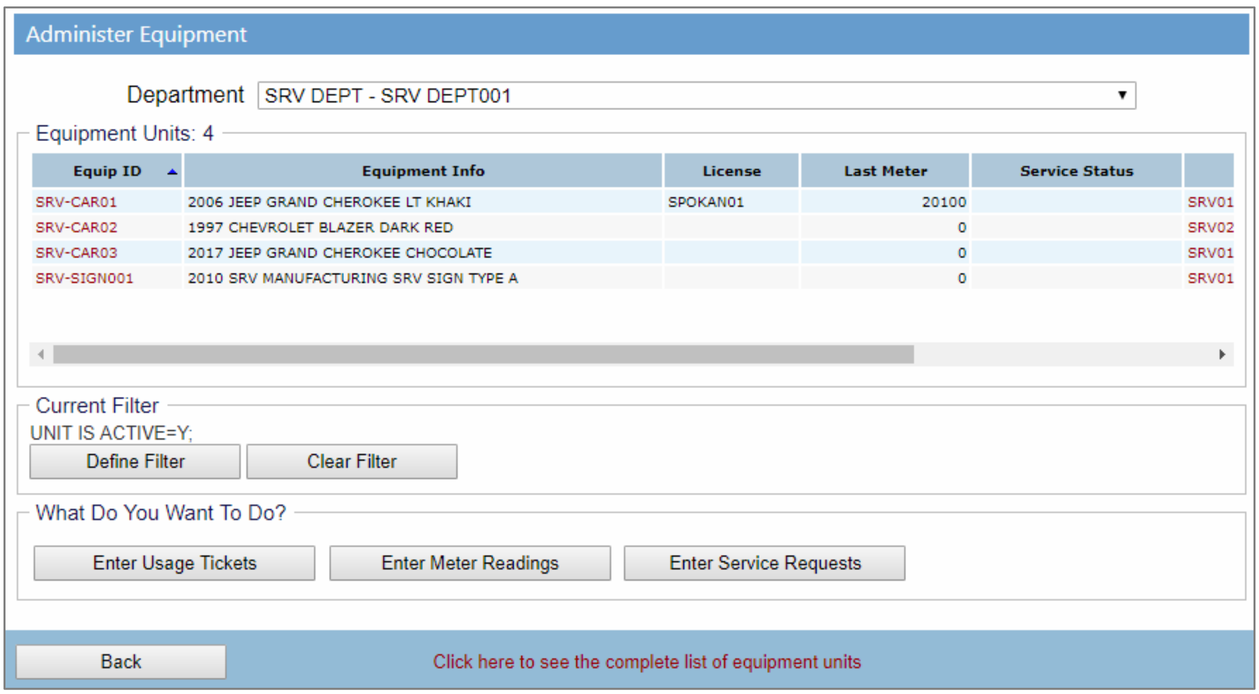
Click the **Administer Operators** button to go to the Administer Operator page.

Note: This button may not display depending on your administrative settings.

Refer to the Administer Operator Page section below for more information about this page.

Administer Equipment Page

Click the **Administer Equipment Units** button on the Main Customer Access page to display the Administer Equipment page.



This page is where users access the Equipment List for specific departments.

Department Drop-down

Select the desired department from the drop-down selection box in the top, center of the page.

The equipment list for the selected department displays.

Equipment Units Section

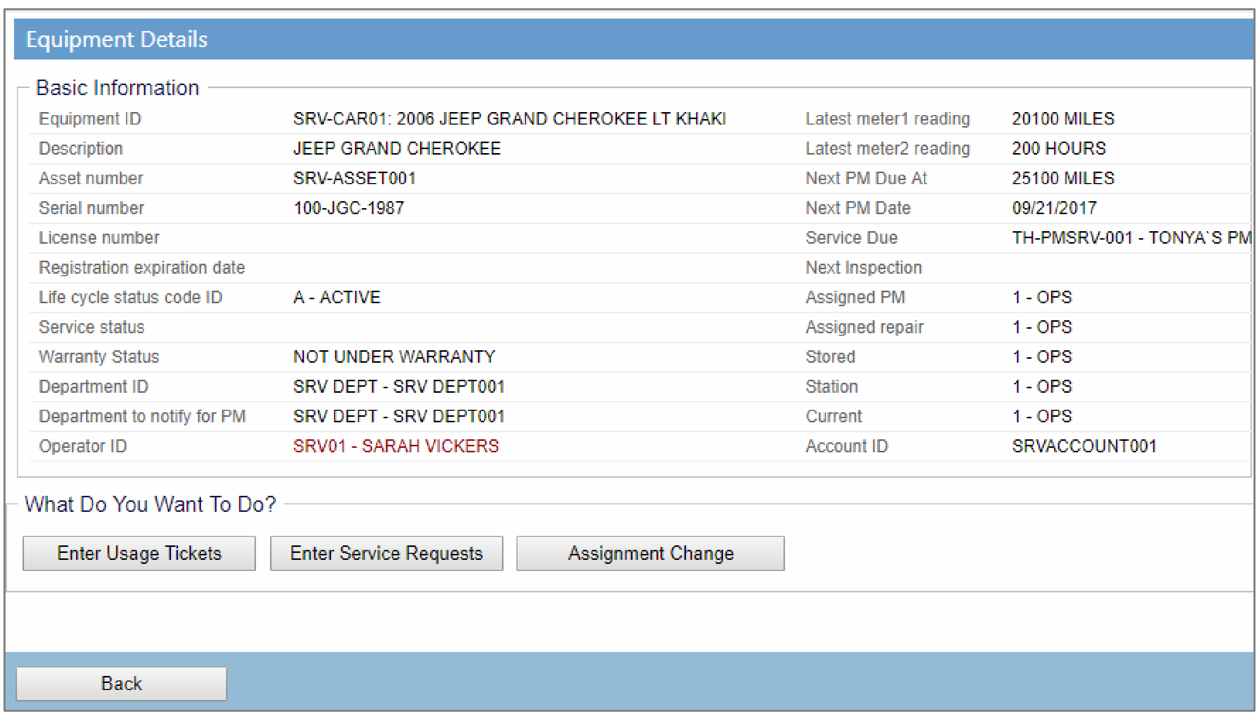
The Equipment Units section lists the number of active equipment units (default) and their corresponding equipment IDs, equipment information, license, last meter, service status, operator information, and PM location. Clicking on each title in this section sorts the list by that title in alphanumeric order.

If the user's department has a lengthy list of equipment assigned, a scroll bar displays on the right side of the section that allows scrolling through the entire equipment list.

Click on an **Equip ID** to go to the Equipment Details Page. See the Equipment Details section below for more information regarding this page. You may also click on an Operator ID to go to the Operator Details Page. See the Operators Section below for more information regarding this page.

Equipment Details

Upon clicking on an Equip ID on the Administer Equipment Page, the Equipment Details Page displays.



This page allows you to enter usage tickets and service requests as well as make assignment changes. See the Enter Usage Tickets and Enter Service Requests sections below for more information regarding these topics. Refer to the next section to learn about assignment changes.

Enter Usage Tickets

For more information on usage tickets, refer to the Enter Usage Tickets section.

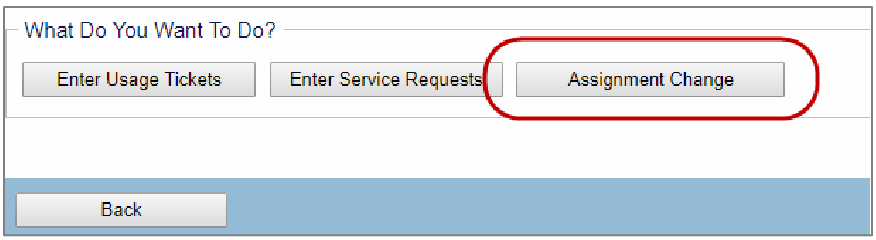
Enter Service Requests

For more information on service requests, refer to the Enter Service Requests section.

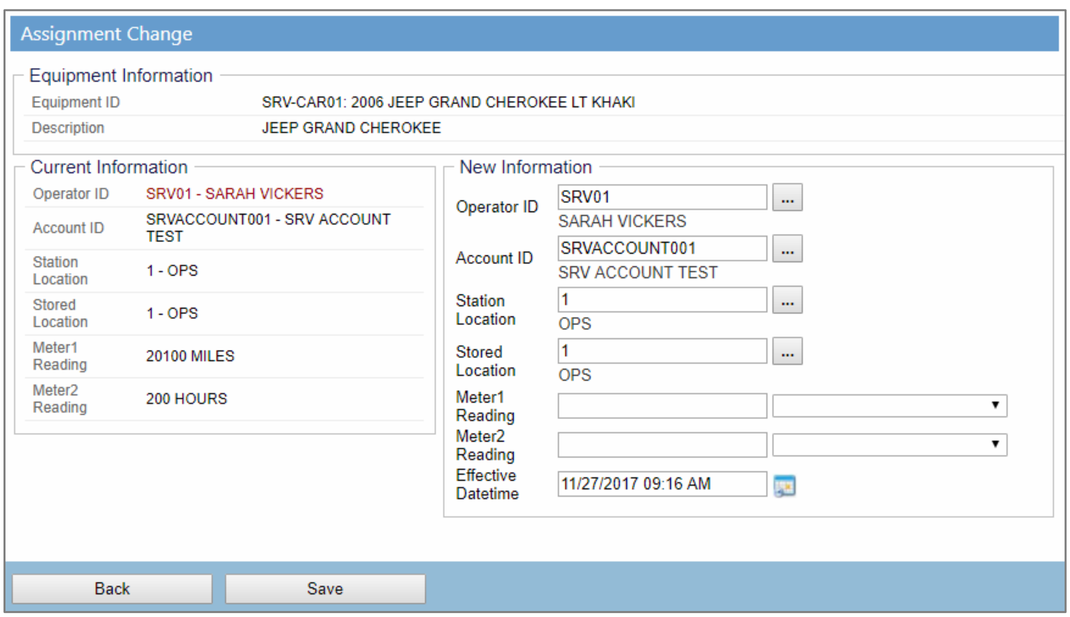
Assignment Change

Follow the steps below to make equipment assignment changes.

1. From the Equipment Details page, click **Assignment Change**.



The Assignment Change page displays.



2. Enter changes as desired and click **Save** to save your entries.

   You are returned to the newly updated main Equipment Details Page.

Current Filter Section

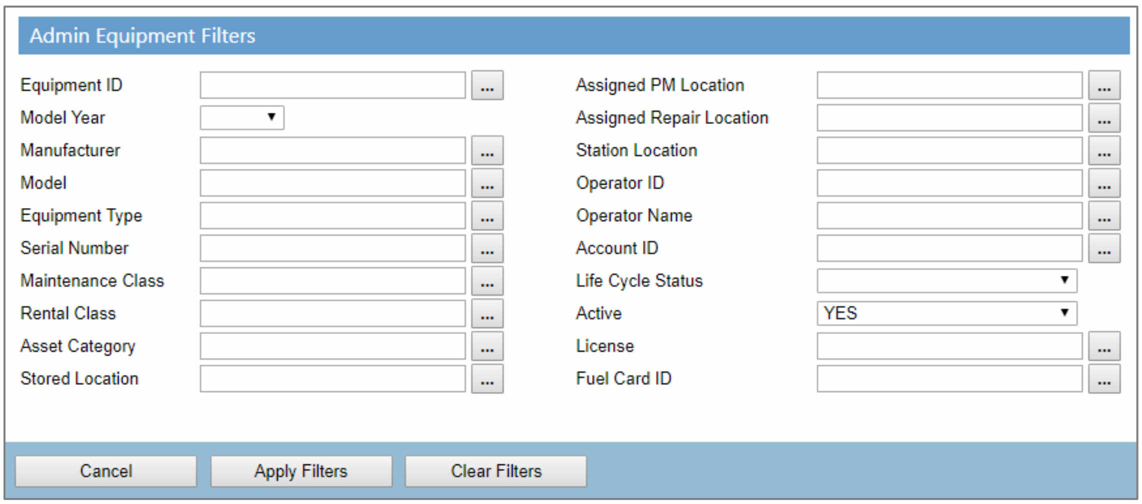
In the Current Filter section, you may decide whether or not to filter the search for your equipment list.

The default filter is to show only active units and reads, **UNIT IS ACTIVE=Y**.

To define a filter for your equipment list:

1. Click the **Define Filter** button.

   The Admin Equipment Filters page displays.



2. Complete the desired fields to filter your search.

   Note: To filter for all active and inactive units, set the **Active** field to blank. To filter for all inactive units, set **Active** to **NO**.

3. Click one of the following:

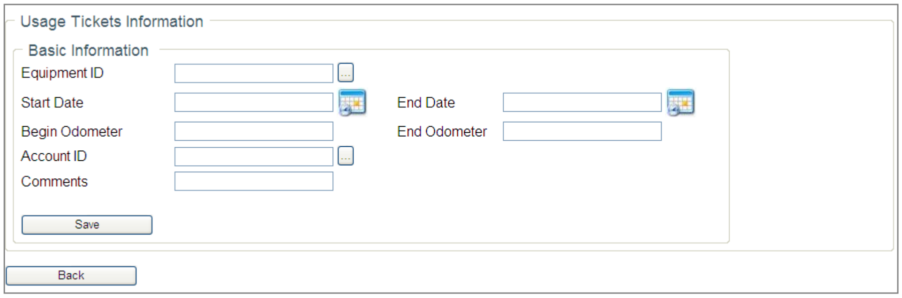
   - **Apply Filters:** Applies the filters and returns to the Administer Equipment page.
   - **Clear Filter:** Clears the filter for your equipment list.
   - **Cancel:** Leave the filters as they are, and return to the Administer Equipment page.

What Do You Want To Do? Section

In the What Do You Want To Do? Section you may choose from the following two options: Enter Usage Tickets and Enter Service Requests.

Enter Usage Tickets

The Enter Usage Tickets button takes you to the Usage Tickets Information Page.



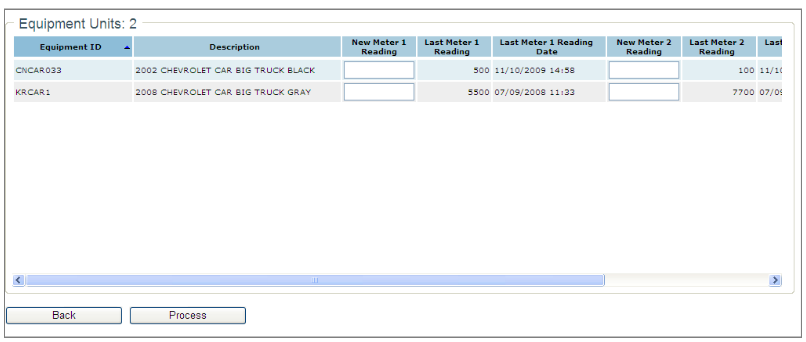
Complete the fields and click **Save** to create a usage ticket. Click **Back** to go back to the Administer Equipment Page.

Enter Meter Readings

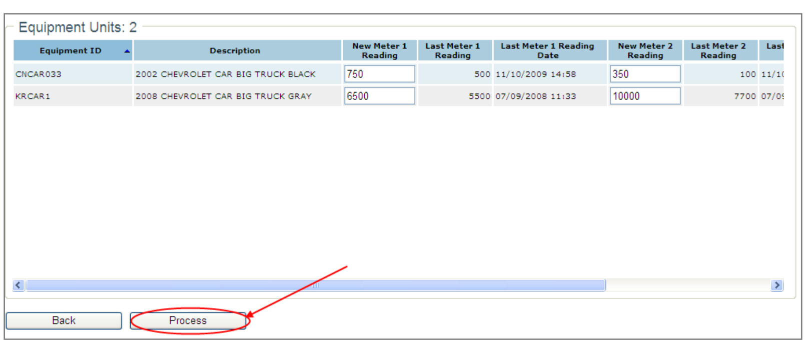
To go to the Meter Readings Page:

1. Click **Enter Meter Readings**.

   The Equipment Units page displays.



2. Enter the meter readings and click **Process**.



   The values update accordingly.

3. Click **Back** to return to the Administer Equipment Page.

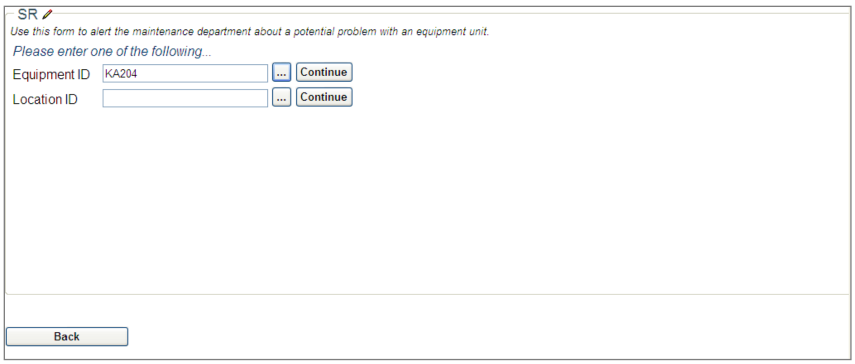
Enter Service Requests

To go to the Service Request Page

1. Click **Enter Service Requests**.

   The Service Request module must be installed for this button to function.

   The initial Service Request Page displays.

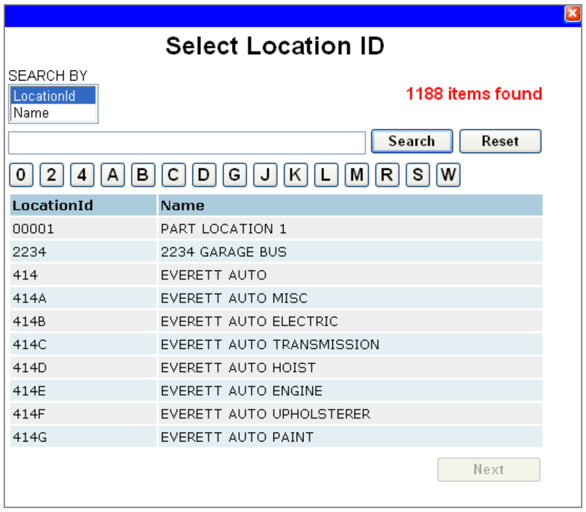


2. Enter an ID or location as follows:

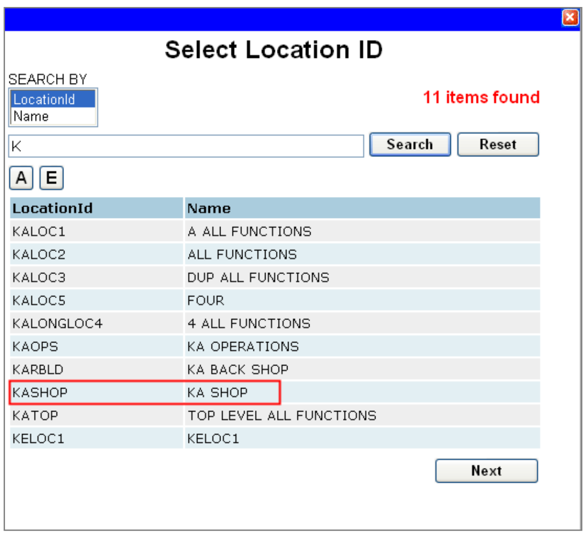
   i. Enter or search for the equipment ID or location ID:

      - If you know the Equipment ID, enter it in the Equipment ID field or click the chooser button (**...**) button to select an Equipment ID from the search list. The Service Request Page will display. Skip to step 7 upon entering the Equipment ID.
      - If you do not know the Equipment ID, you may enter the Location ID. Click the chooser button (**...**) button if you do not know the exact Location ID.

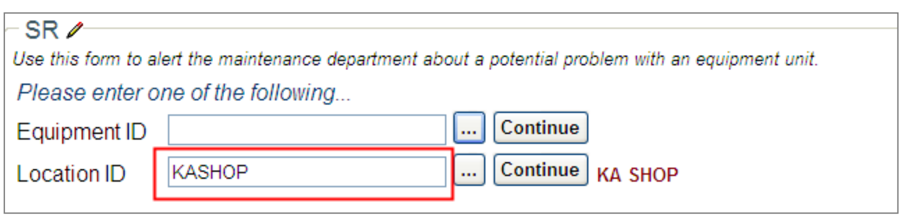
   After clicking either search button, a search list displays.



ii. Select the desired location.

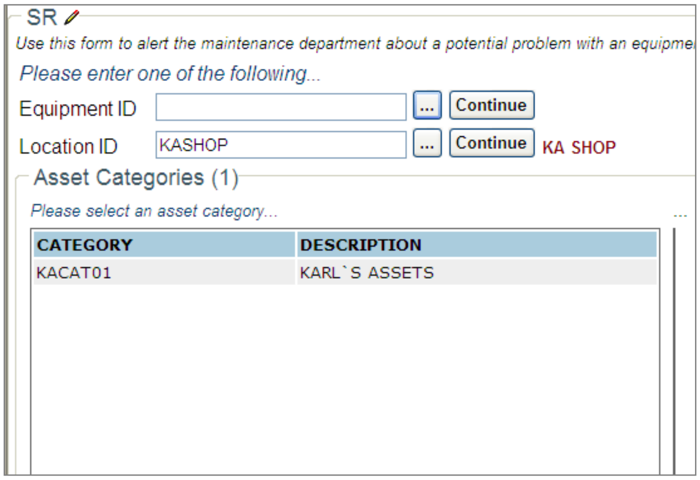


The Location ID is populated on the Main Service Request Page.

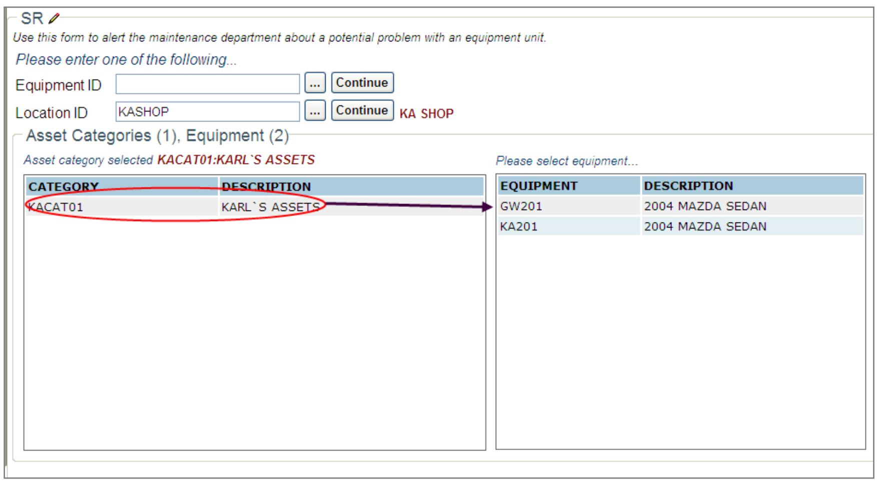


3. Once a Location ID is entered, click **Continue**.

   The Asset Categories list for the selected location displays.

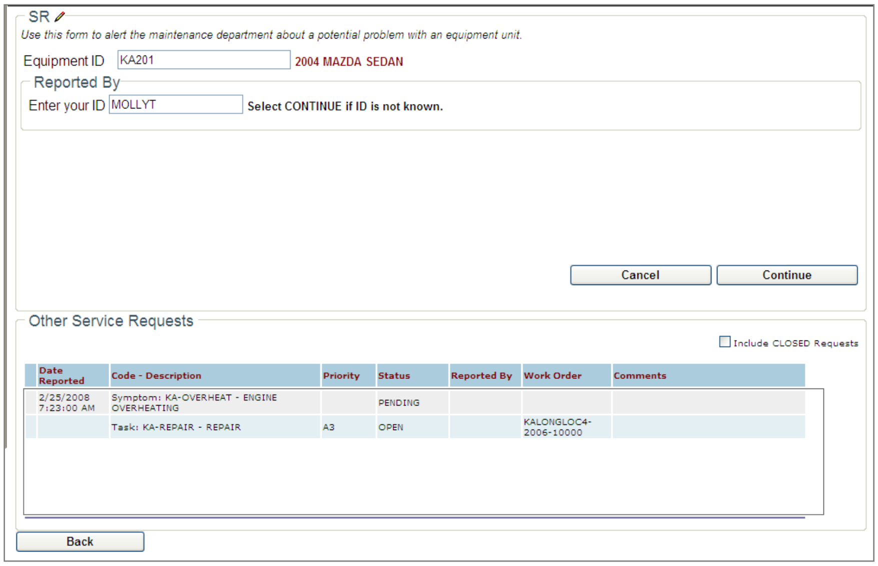


4. Click the desired Asset Category and the Equipment List displays to the right.



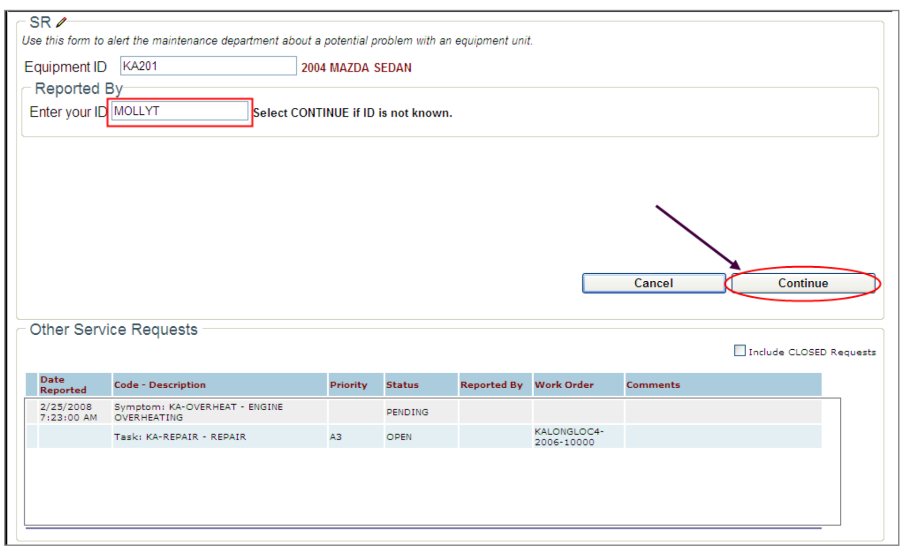
5. Click the desired Equipment ID.

The Service Request Page displays with the Equipment ID field populated.

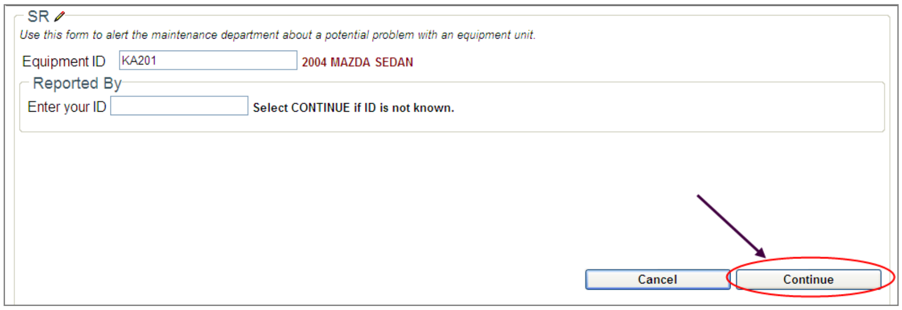


6. Depending on how you configured the security information for the Service Request module will determine the next step to follow:

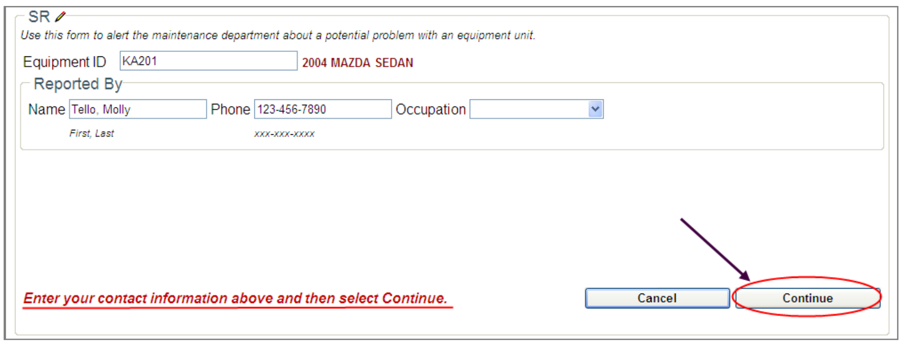
   i. If you configured the Service Request module to require an authenticated user, the **Enter your ID** field will be prepopulated. Click **Continue** and go to the next numbered step. Otherwise, proceed to the next step below.



   ii. If you configured the module to **Allow Anonymous Entries**, the user may either enter their Operator ID or Employee ID, and then click **Continue**. Then skip to the next numbered step and continue following the instructions. If a user does not have an operator ID or employee ID, they may click **Continue** to enter their contact information.

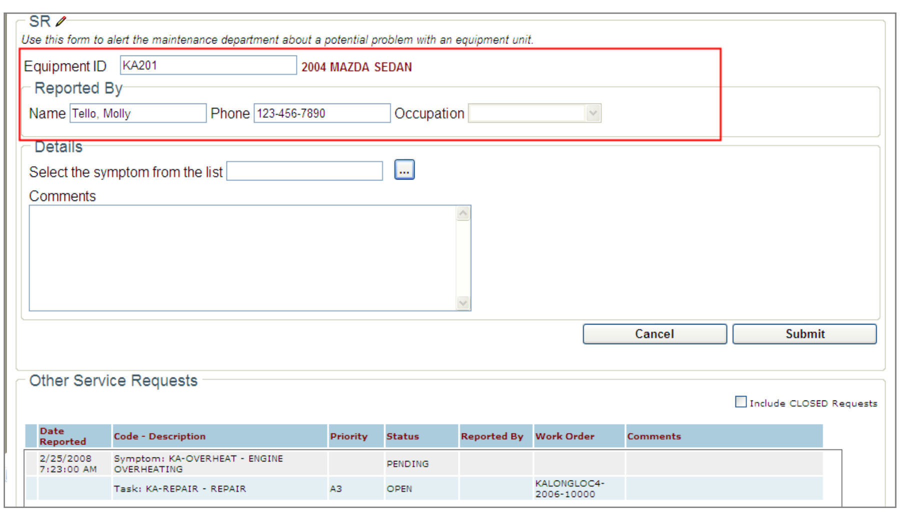


A page appears where the user enters contact information and then clicks the ***Continue*** *button.*

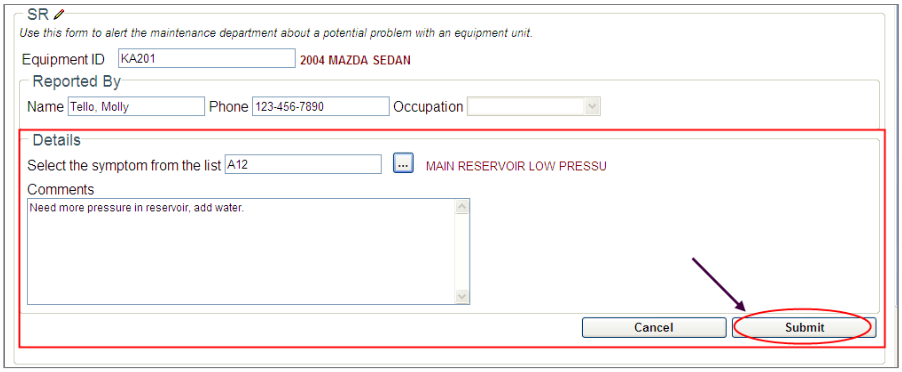


- After clicking the **Continue** button (in all cases - when the ID prepopulated, the ID is known, or the ID is unknown and the user has entered the contact information), the user's information is displayed in the Reported By section. The Details section of the Service Request Page also appears on the bottom half of the page.

The Service Request Page displays with the selected Equipment ID and Contact information complete.

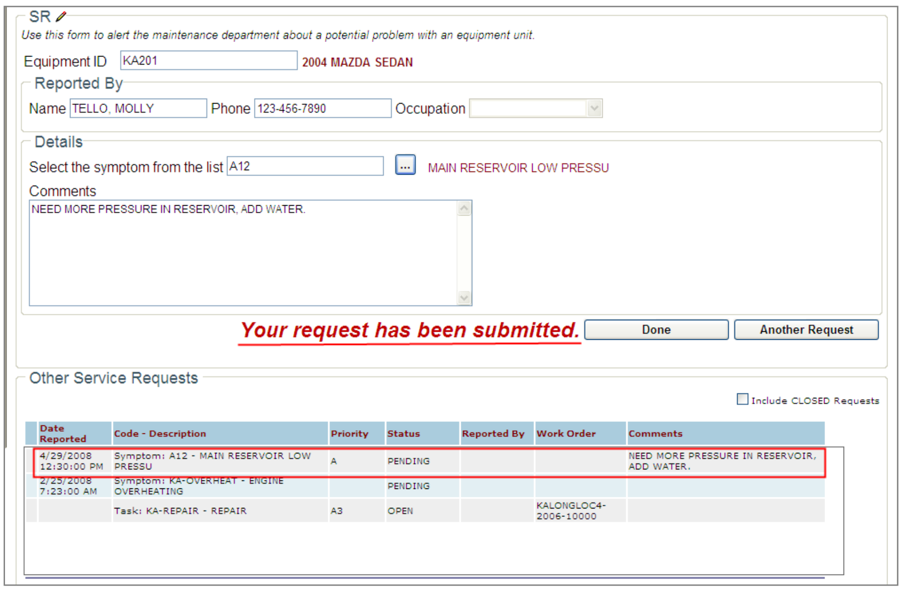


7. In the Details section, select the symptom from the search list and enter comments as necessary in the Comments field.



8. Click **Submit** to submit the Service Request.

   *The message, **Your request has been submitted**, displays on the page and the new service request is at the top of the list.*



The Other Service Requests section at the bottom of the page lists all open and pending service requests associated with the equipment ID. Users may also check the **Include CLOSED Requests** box to view the history of all service requests for the particular equipment ID.

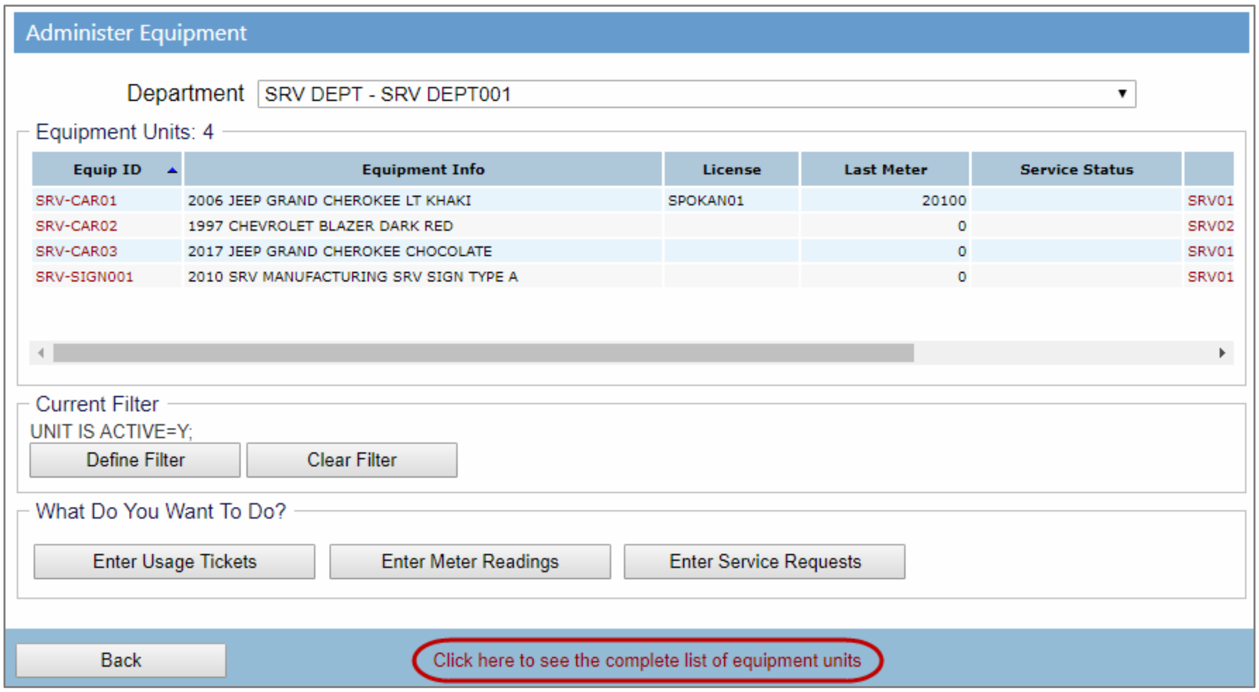
You now have the option to:

- Click **Another Request** to submit another service request
- Click **Done** to go to the initial Service Request page
- Click **Back** to go back to the Main Customer Access page

Reports Link

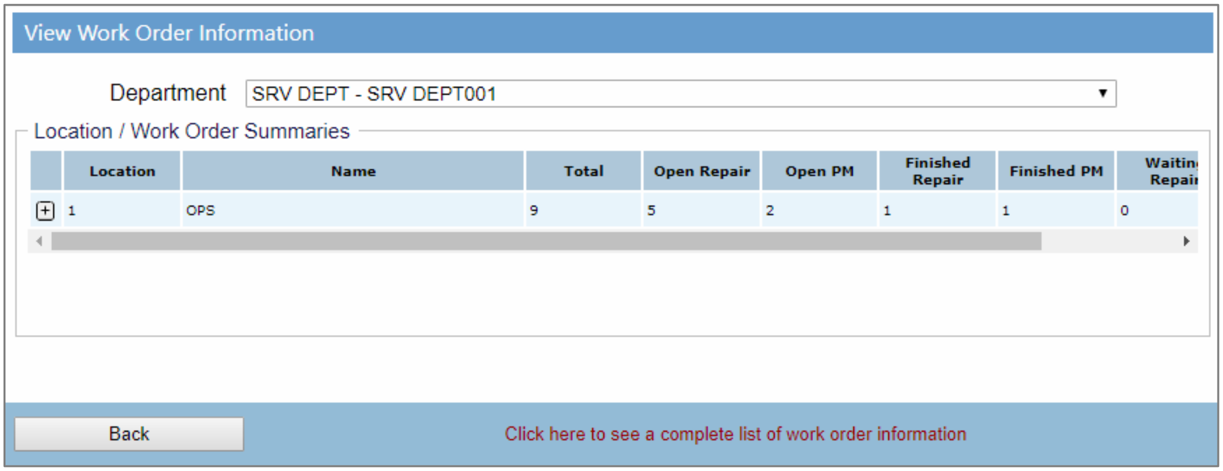
Clicking the **Click here to see the complete list of equipment units** link connects you to the report specified in the **Equipment Unit Report** setting on the Customer Access Portal settings page. This report displays all equipment assigned to the user's department. The report also allows the user to print and save information, and provides drill-down for detail on individual equipment IDs.

Using this feature requires that you have installed the Reporting module and the user must also have authorization to view reports.



View Work Order Information Page

Click the **View Work Order Information** button on the main Customer Access page to open the View Work Order Information page.



Click the red **Click here to see a complete list of work order information** link to go to a work order list report (if a report was set in the **Work Order List by Report** setting).

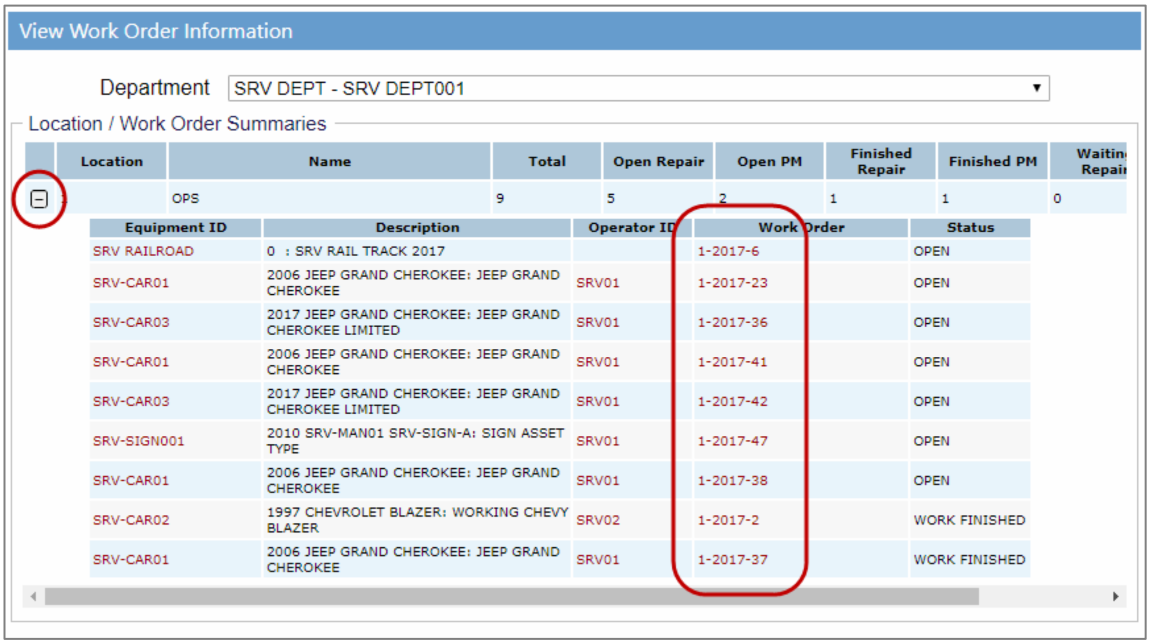
Department Drop-down

Select the desired department from the department drop-down. The work order information list for the selected department displays for the chosen department.

Location/Work Order Summaries Section

The Location/Work Order Summaries section lists the following columns for the selected department: Location, Name, Total, Open Repair, Open PM, Finished Repair, Finished PM, Waiting Repair and Waiting PM.

Click the **+** button to expand the selection to view detailed work order information for the specific locations. The expanded selections display the Equipment ID, Description, Operator ID, Work Order, and Status columns.



Location	Name	Total	Open Repair	Open PM	Finished Repair	Finished PM	Waitin Repair
	OPS	9	5	2	1	1	0

Equipment ID	Description	Operator ID	Work Order	Status
SRV RAILROAD	0 : SRV RAIL TRACK 2017		1-2017-6	OPEN
SRV-CAR01	2006 JEEP GRAND CHEROKEE: JEEP GRAND CHEROKEE	SRV01	1-2017-23	OPEN
SRV-CAR03	2017 JEEP GRAND CHEROKEE: JEEP GRAND CHEROKEE LIMITED	SRV01	1-2017-36	OPEN
SRV-CAR01	2006 JEEP GRAND CHEROKEE: JEEP GRAND CHEROKEE	SRV01	1-2017-41	OPEN
SRV-CAR03	2017 JEEP GRAND CHEROKEE: JEEP GRAND CHEROKEE LIMITED	SRV01	1-2017-42	OPEN
SRV-SIGN001	2010 SRV-MAN01 SRV-SIGN-A: SIGN ASSET TYPE	SRV01	1-2017-47	OPEN
SRV-CAR01	2006 JEEP GRAND CHEROKEE: JEEP GRAND CHEROKEE	SRV01	1-2017-38	OPEN
SRV-CAR02	1997 CHEVROLET BLAZER: WORKING CHEVY BLAZER	SRV02	1-2017-2	WORK FINISHED
SRV-CAR01	2006 JEEP GRAND CHEROKEE: JEEP GRAND CHEROKEE	SRV01	1-2017-37	WORK FINISHED

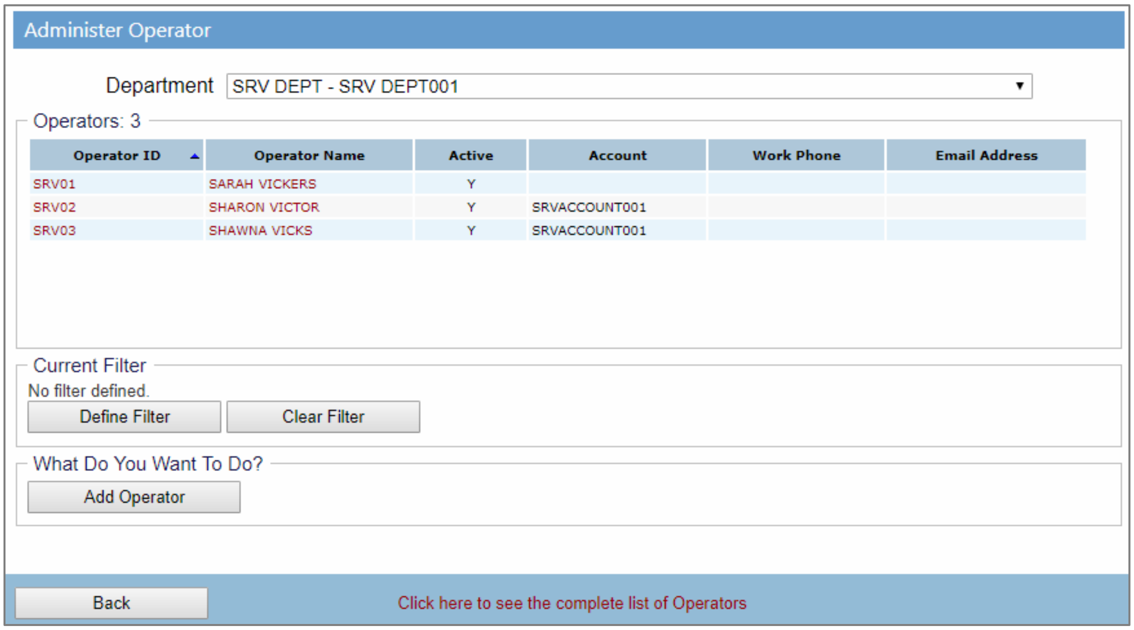
In the expanded selection, click the **Work Order** link to go directly to the Work Order Detail Report.

Click **Back** to return to the Main Customer Access Page.

Administer Operator Page

This page is only available if configured in your administrative settings.

Click the **Administer Operators** button on the Main Customer Access page to open the Administer Operator page. This page displays the list of operators available for the selected department.



Department Drop-down

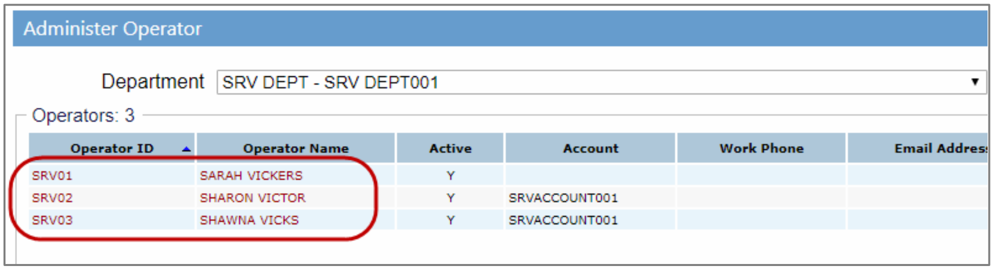
Select the desired department from the department drop-down. The operator list displays for the selected department.

Operators Section

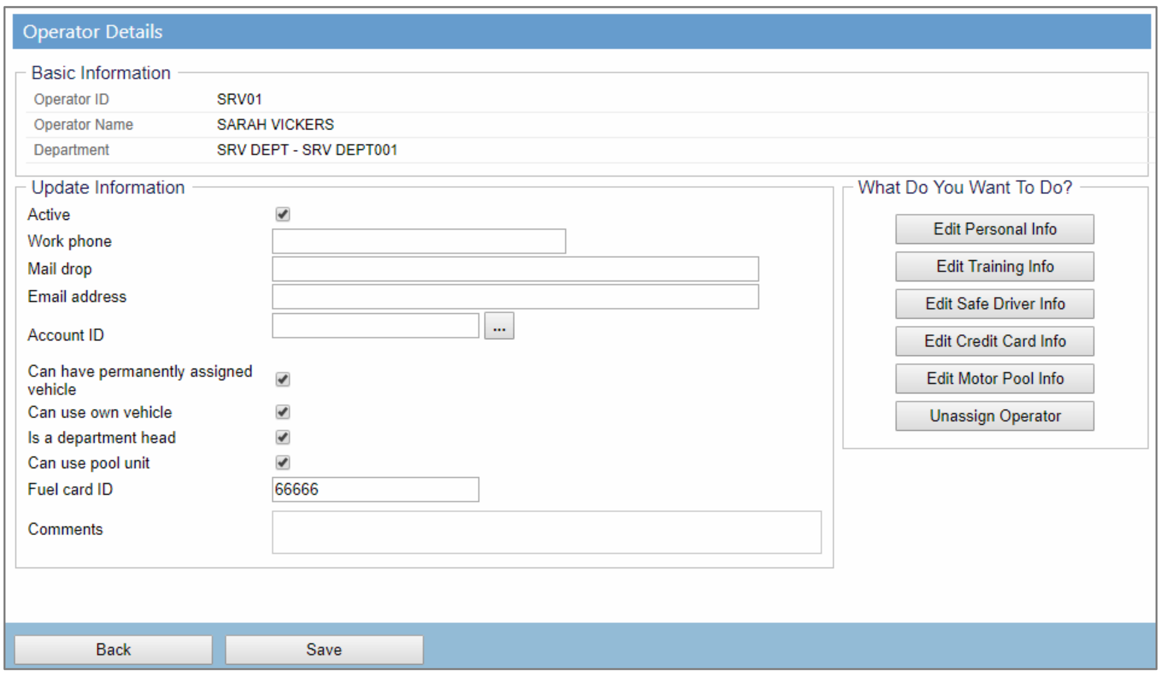
The Operators section lists the number of operators and their corresponding Operator ID, Operator Name, Active (Y/N), Account, Work Phone, and Email Address.

To view more operator information:

1. Click either the **Operator ID** or **Operator Name** column links.



The Operator Details page displays.



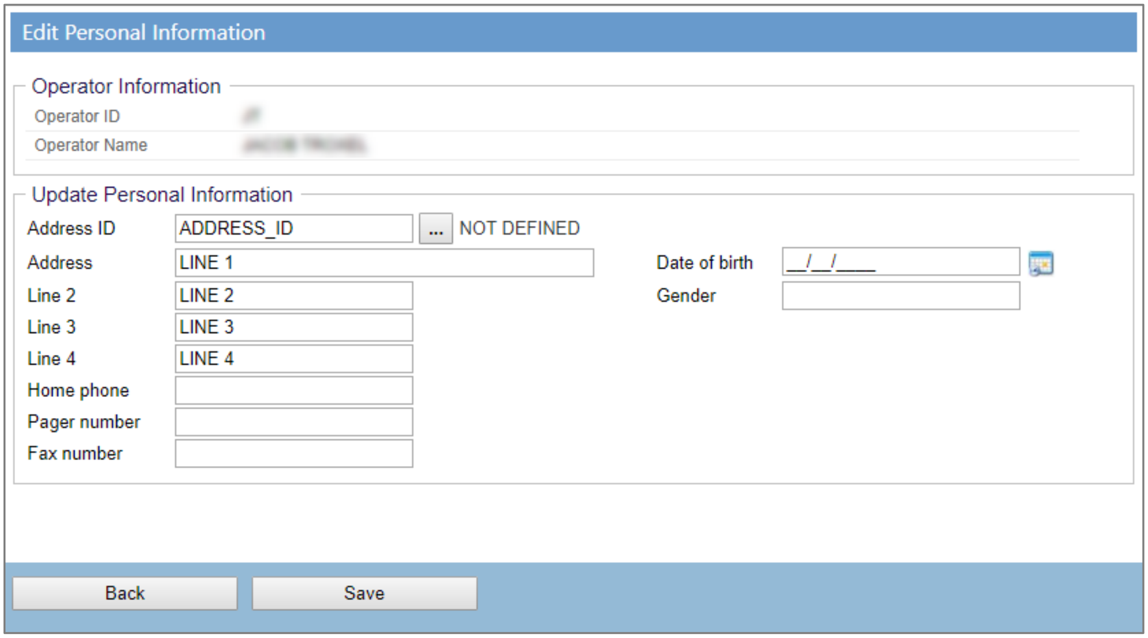
*The fields displayed in the Update Information section are based on the user's control rights for **Deny View** as settings. The ability to update the fields is controlled by the **Deny Update** settings in the GUI.*

All account IDs listed in the Customer Access module drop-downs are all the active account IDs defined for a department. These IDs are set on the Accounts – Primary Information screen with the **Assign to equipment units or departments or operators** checkbox.

2. Complete the fields and click **Save** to update the operator details.

3. To edit personal, training, safe driver, credit card, or motor pool information, or unassign an operator, click the corresponding button in the What Do You Want To Do? section. The following sections provide information about each of these functions.

Edit Personal Information



To edit personal information:

1. From the Operator Details page, click **Edit Personal Info**.

   The Edit Personal Information page displays.

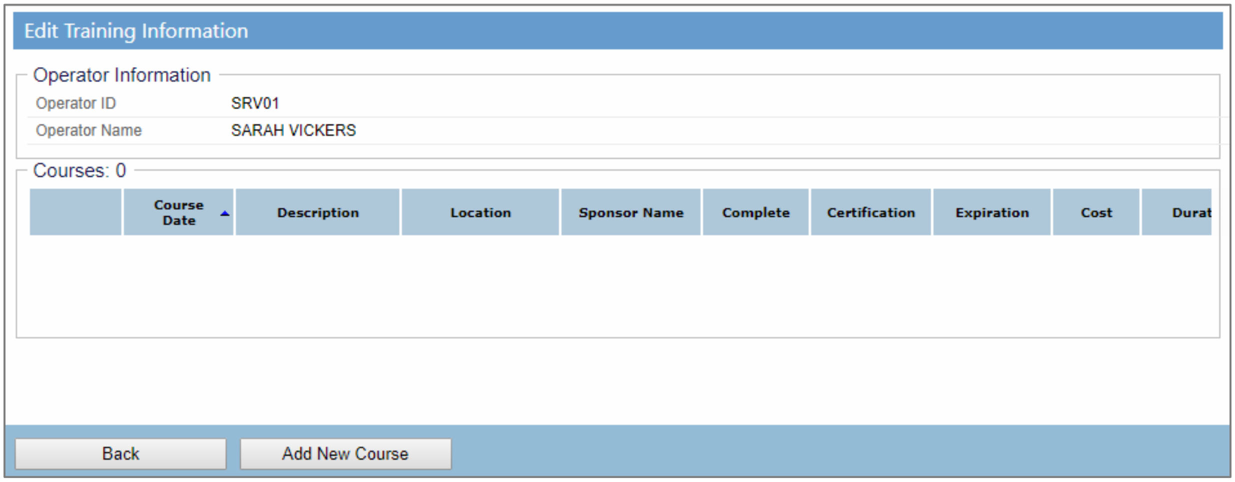
2. Complete the desired fields as needed.

3. Click **Save** to save your entries.

   A message displays to indicate the information was successfully updated.

4. Click **Back** to return to the Operator Details Page.

Edit Training Information



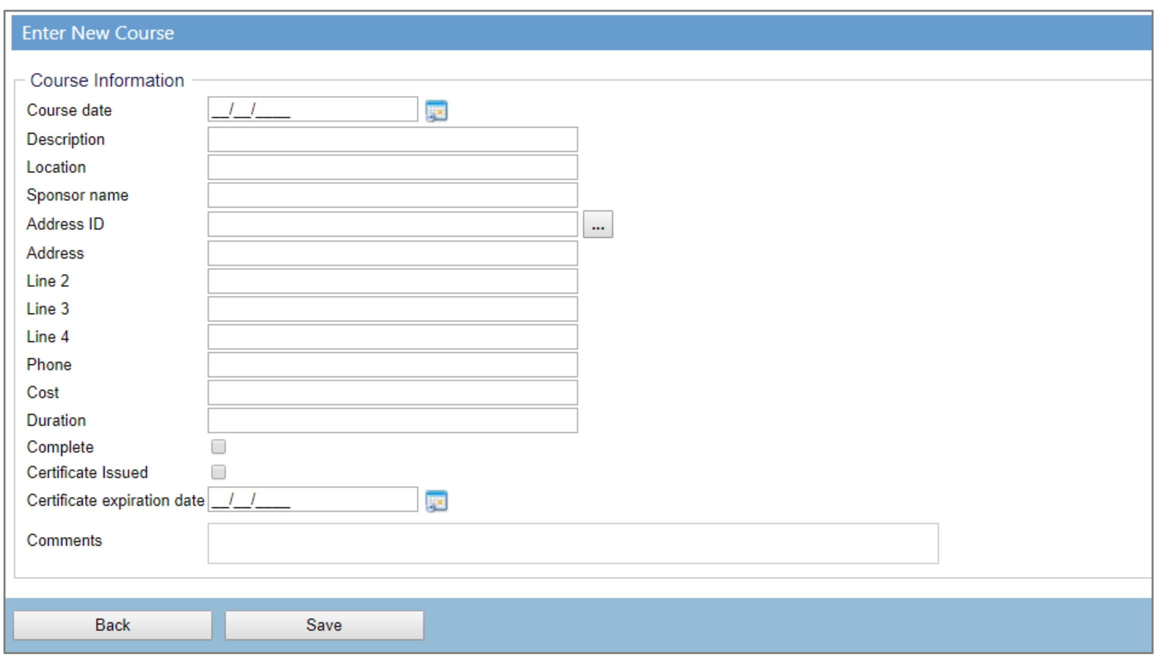
To edit training information:

1. From the Operator Details screen, click **Edit Training Info**.

   The Edit Training Information page displays with training courses listed.

2. To add a new course, click **Add New Course**.

   The Enter New Course page displays.

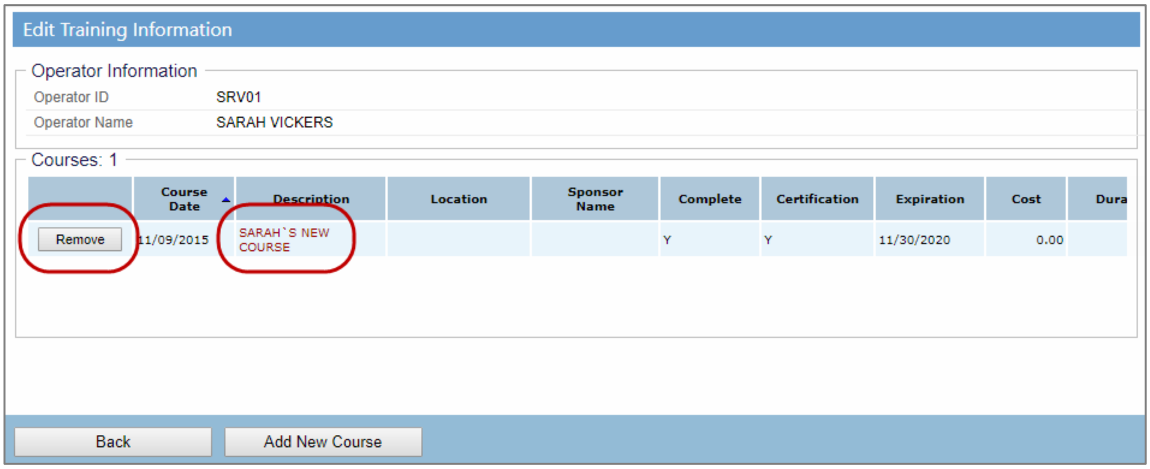


3. Complete the fields with the course information.

4. Click **Save** to add the course.

5. Click **Back** to go back to the Edit Training Information page.

6. Once training information exists, you can delete it by clicking **Remove,** or edit the data by clicking the course link.

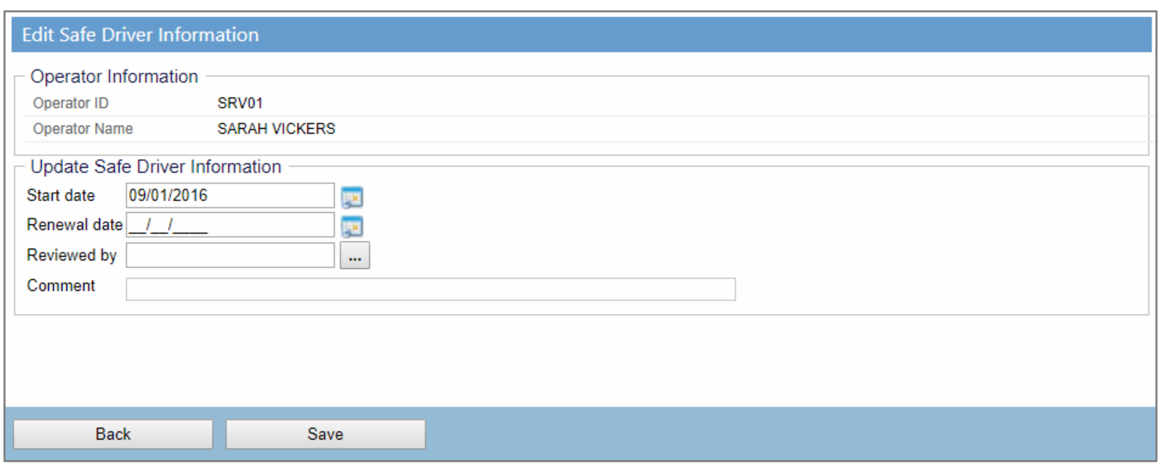


Edit Safe Driver Information

To edit safe driver information:

1. From the Operator Details screen, click **Edit Save Driver Info**.

   The Edit Safe Driver Information Page displays.



2. Complete the fields.

3. Click **Save** to save your entries.

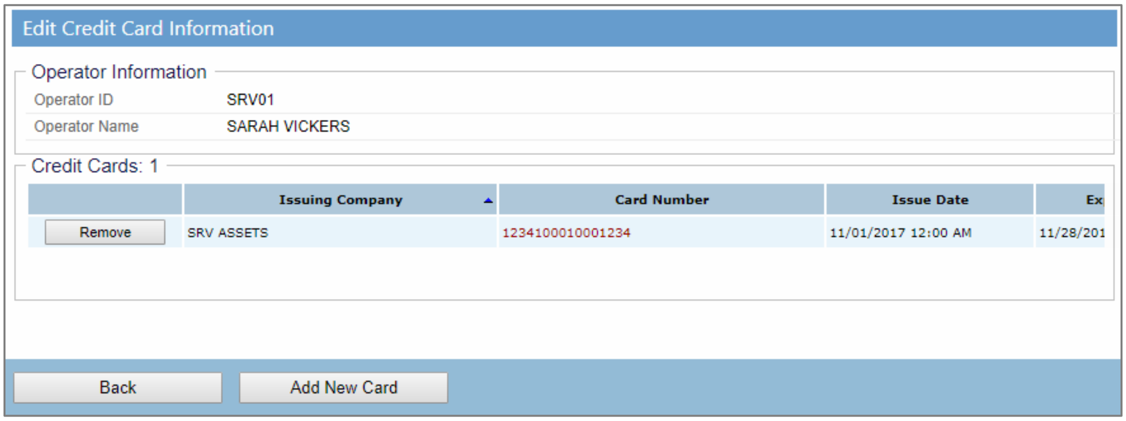
4. Click **Back** to go back to the Operator Details page.

Edit Credit Card Information

To edit credit card information:

1. From the Operator Details screen, click **Edit Credit Card Info**.

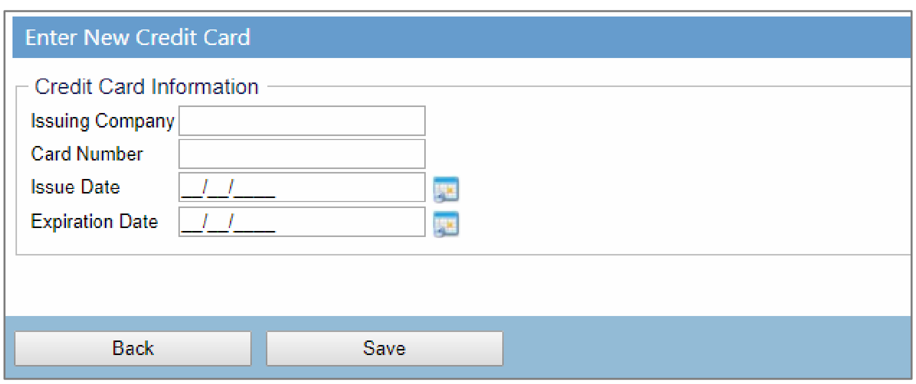
   The Edit Credit Card Information page displays.



2. To add a new card:

   i. Click **Add New Card**.

   ii. The Enter New Credit Card page displays.



   iii. Enter the card information.

   iv. Click **Save**.

   v. Click **Back**.

3. To edit an existing card:

   i. Click the red link in the **Card Number** column.

   ii. Edit field as needed.

iii. Click **Save**.

iv. Click **Back**.

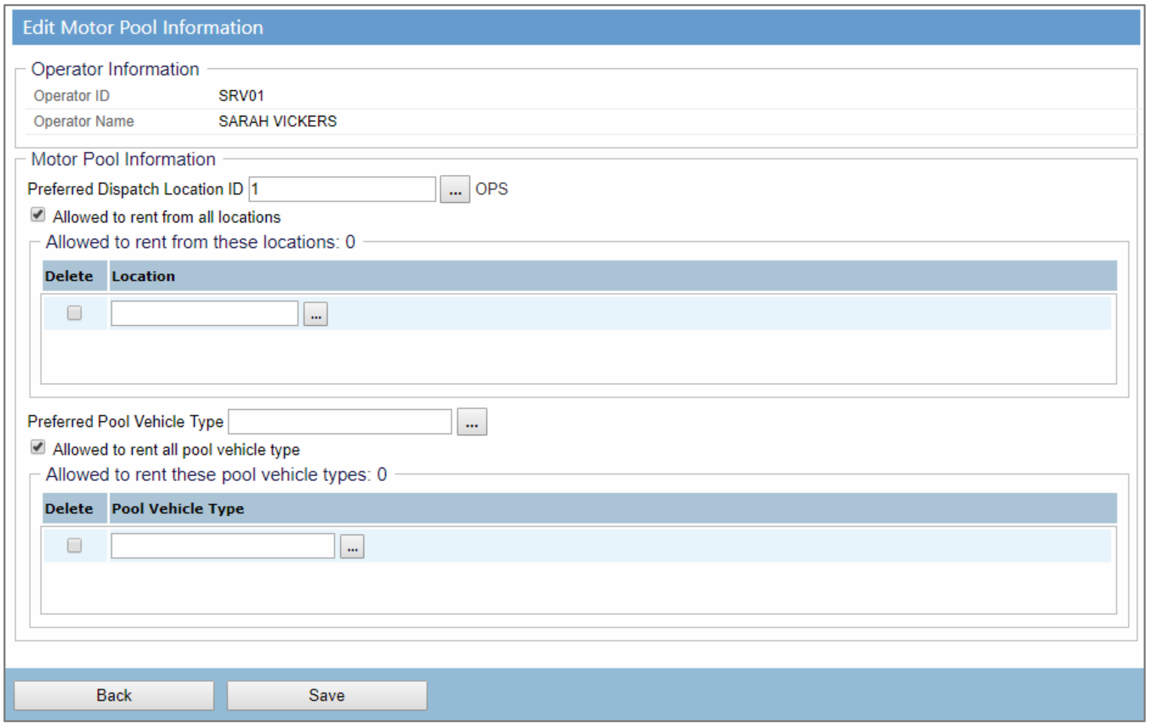
4. To remove an existing card, click **Remove**.
5. Click **Save** to save your entries.
6. Click **Back** to go back to the Operator Details page.

Edit Motor Pool Information

To edit motor pool information:

1. From the Operator Details screen, click **Edit Motor Pool Info**.

   The Edit Motor Pool Information page displays.

2. Complete the fields as needed to add dispatch locations and preferred pool vehicle types.

   When a motor pool location or vehicle type is assigned to an operator on the Edit Motor Pool Information Page, the **Can Use Pool Unit** check box is automatically checked on the Operator Details Page so that reservations can be made.

3. To delete locations or pool vehicle types, check the Delete checkbox and when you click **Save**, the item is deleted.

4. Click **Save** to save your entries.

   A message displays to indicate the information was successfully updated.

5. Click **Back** to return to the Operator Details Page.

Unassign Operator

Alert: When you click **Unassign Operator**, the operator will be unassigned with no further confirmation message.

Click **Unassign Operator** to remove an operator from the assignment. The operator goes into the holding department, becomes unassigned, and no longer appears on your Operators list for the department.

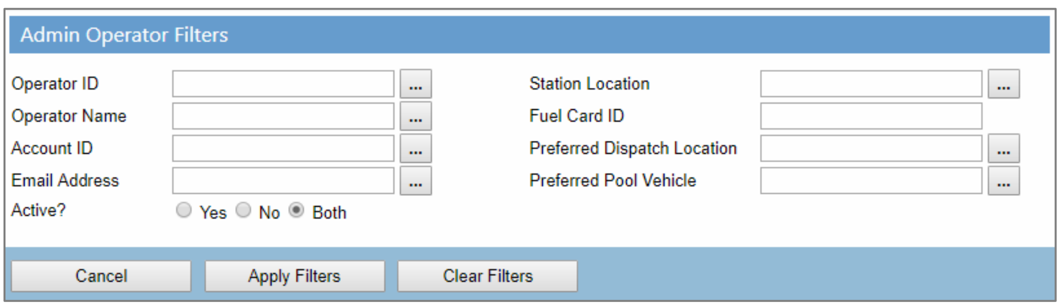
Current Filter Section

In the Current Filter section, you may decide whether or not to filter the search for your operator list. If you have not previously defined a filter, this section reads, “No filter defined…”

To define a filter for your operator list:

1. Click the **Define Filter** button.

   The Admin Operator Filters page displays.



2. Complete the desired filter fields for the filter.

3. Click **Apply Filters** to apply the new filter parameters, or **Clear Filters** to clear the filters.

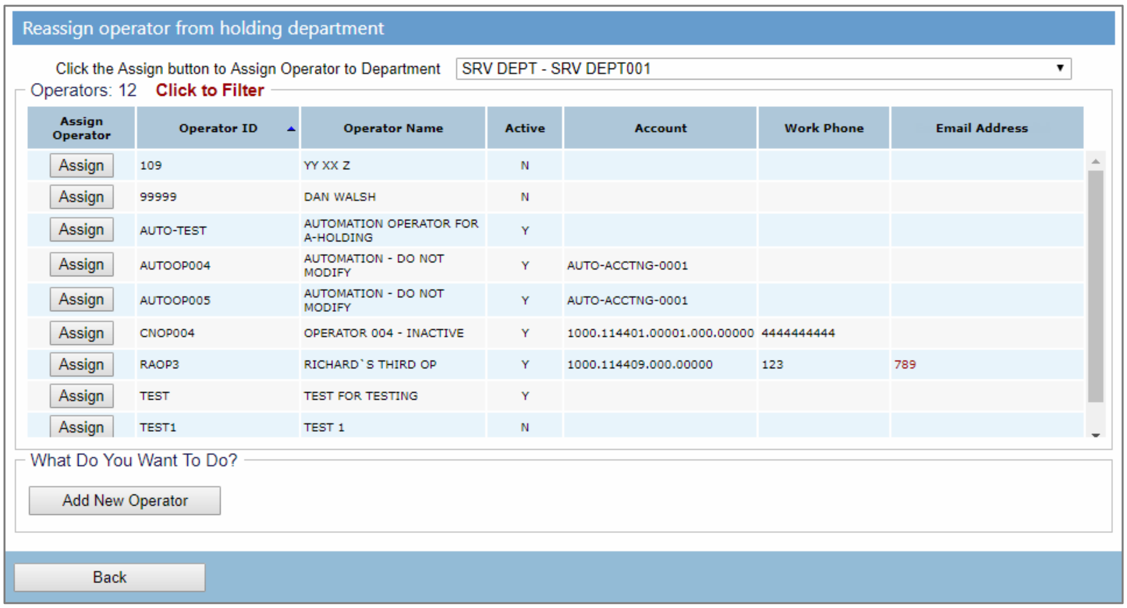
   You are returned to the Administer Operator page with the Operator list displaying information based on your filter.

What Do You Want To Do? Section

In the What Do You Want To Do? Section of this page, there is an **Add Operator** button, which allows you to reassign or add operators.

To assign an operator:

1. From the main Customer Access page, click **Add Operator**.
2. *The Reassign operator from holding department page displays.*



Reassign operator from holding department

Click the Assign button to Assign Operator to Department SRV DEPT - SRV DEPT001

Operators: 12 Click to Filter

Assign Operator	Operator ID	Operator Name	Active	Account	Work Phone	Email Address
Assign	109	YY XX Z	N			
Assign	99999	DAN WALSH	N			
Assign	AUTO-TEST	AUTOMATION OPERATOR FOR A-HOLDING	Y			
Assign	AUTOOP004	AUTOMATION - DO NOT MODIFY	Y	AUTO-ACCTNG-0001		
Assign	AUTOOP005	AUTOMATION - DO NOT MODIFY	Y	AUTO-ACCTNG-0001		
Assign	CNOP004	OPERATOR 004 - INACTIVE	Y	1000.114401.00001.000.00000	4444444444	
Assign	RAOP3	RICHARD`S THIRD OP	Y	1000.114409.000.00000	123	789
Assign	TEST	TEST FOR TESTING	Y			
Assign	TEST1	TEST 1	N			

What Do You Want To Do?

Add New Operator

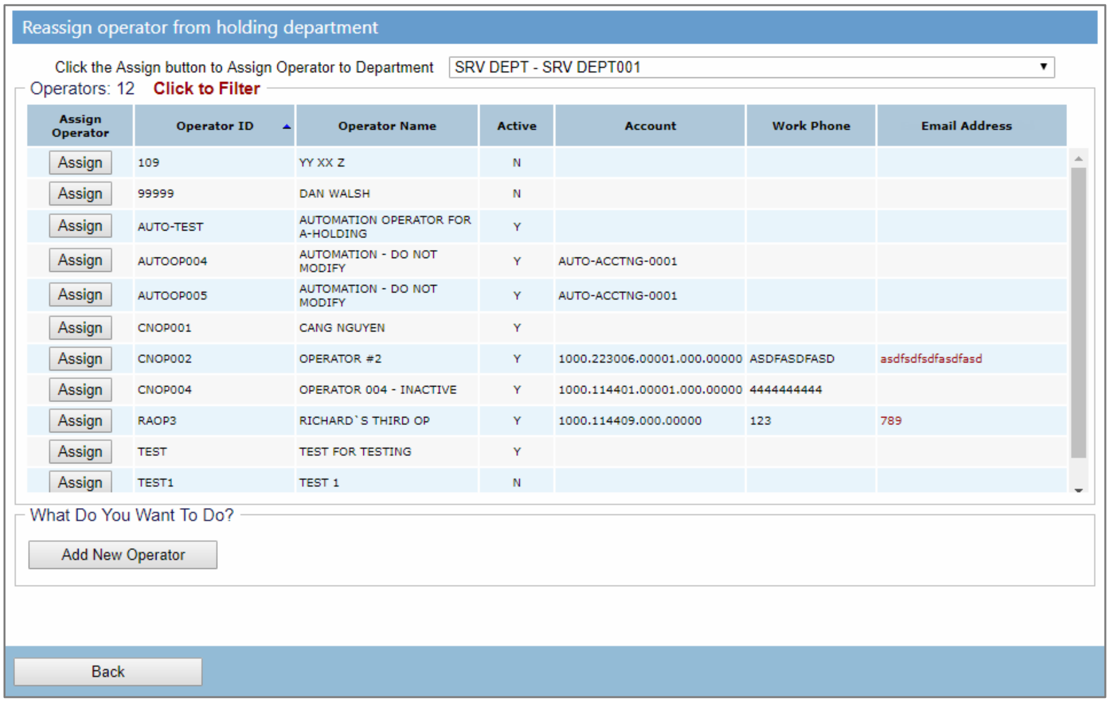
Back

3. In the drop-down menu, choose which department the operator will be assigned to.
4. Find the operator in the Operators list, and click **Assign**.
5. The operator is assigned from the holding area to the department in the department drop-down at the top of the page.

To add a new operator:

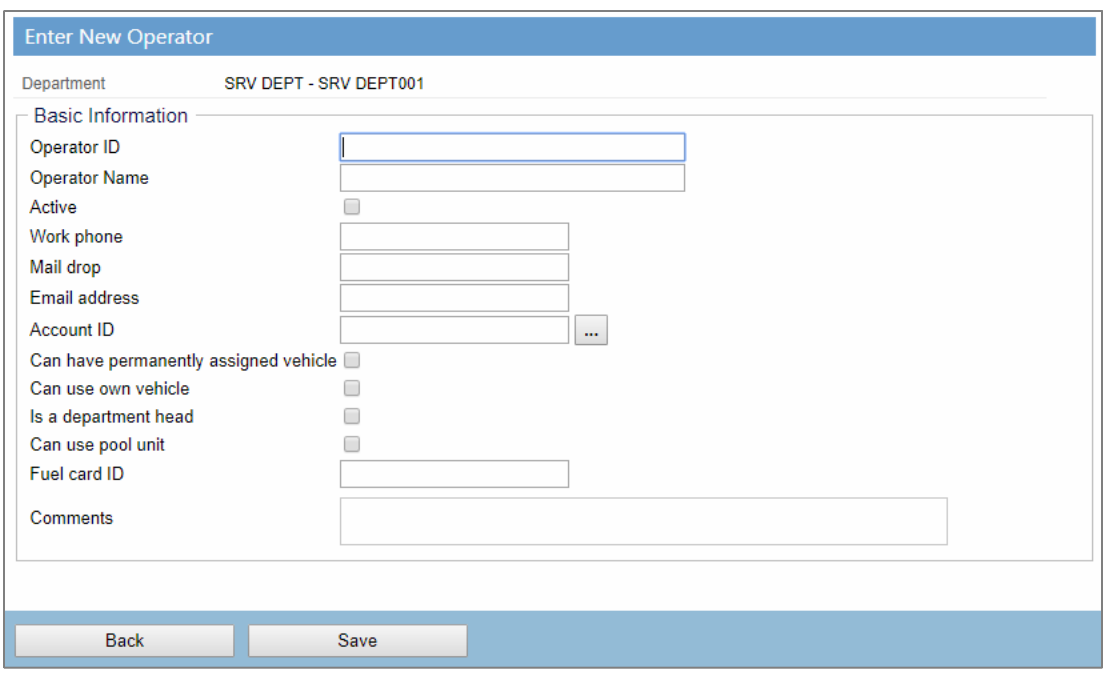
1. From the main Customer Access page, click **Add Operator**.

   The Reassign operator from holding department page displays.



2. Click **Add New Operator**.

   The Enter New Operator page displays.



3. Complete the desired fields as needed.
4. Click **Save** to enter a new operator.
5. Click the **Back** button to go to the Administer Operator Page.

The Back Button

The **Back** button on the Administer Operator Page takes you back to the Main Customer Access Page.

4. PM Appointments

Within the system, your customers (internal or external) can set up PM appointments as needed. This section describes the workflow for this process. Working from email or from the Messages section in the instance follows the same steps, even though images from the Messages window are shown in the following section. For more information on setting up MAXQueue for notifications, refer to the MAXQueue and Notification Setup section.

The following processes are set up according to the user creating the appointment, and the supervisor who then approves the appointment request.

Creating a PM Appointment

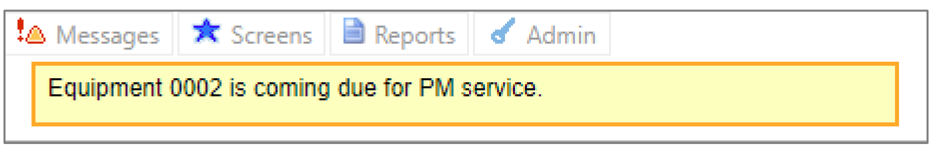
To schedule a PM appointment:

1. A supervisor creates the PM work order.

   The PM appointment workflow (WF – Schedule PM Appt) is triggered by a supervisor creating a PM work order in PENDING status.

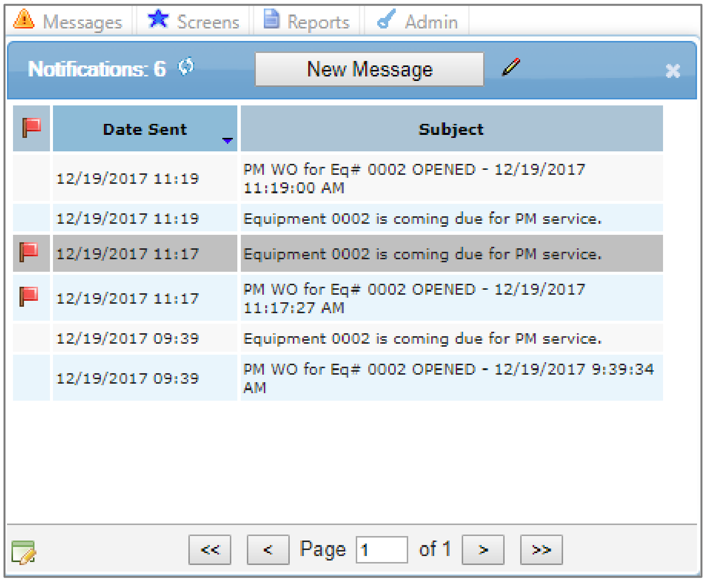
   MAXQueue sends a notification to the point of contact for that vehicle.

   Note: To receive emails and notifications, notification rules must be set up and enabled. Refer to the *Notifications Administrator Guide, Section 4. Configuring Notifications* for information to set up these rules.

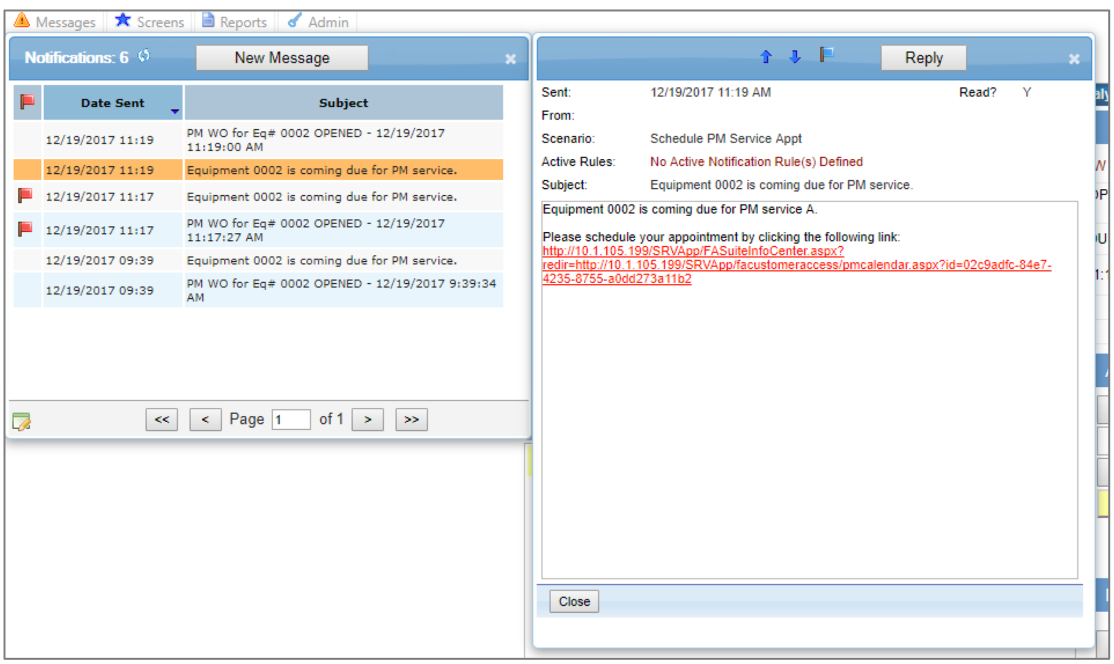
2. Open your email or click **Messages** in the instance. ‘

The message list displays.

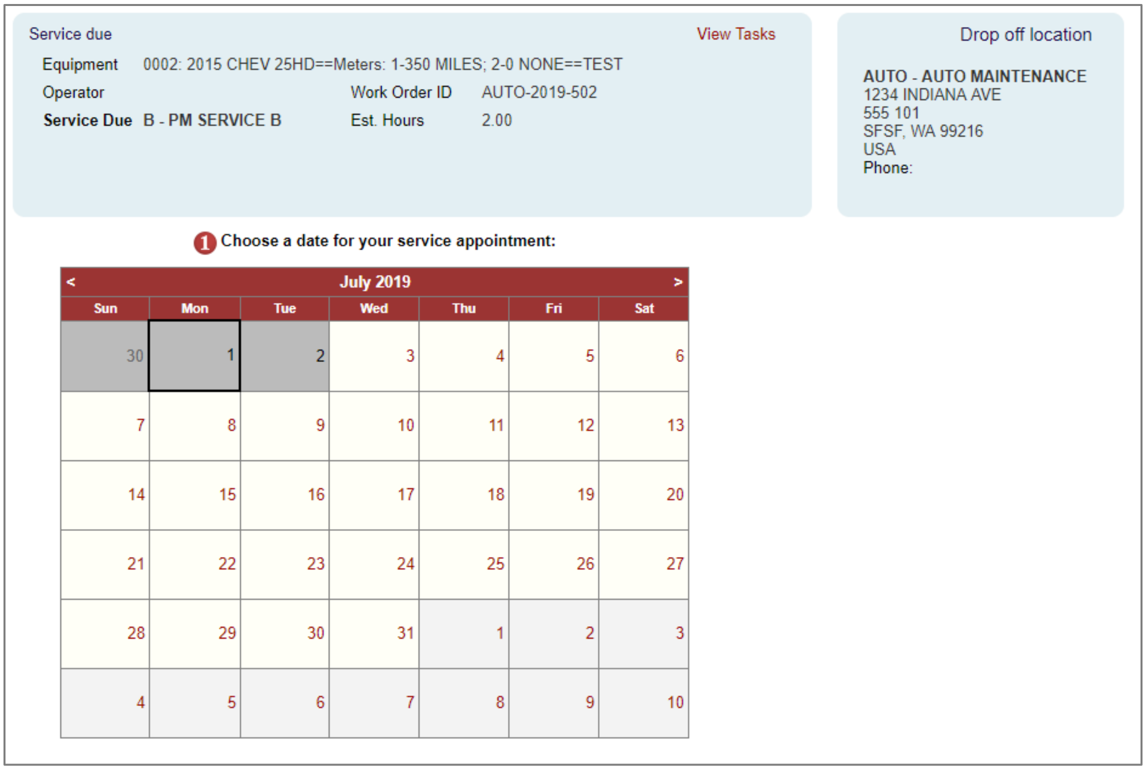


3. Click the **coming due for PM service** message.

   The message displays. To ensure you have the correct message, the Scenario listed in this message should display ***Schedule PM Service Appt****.*



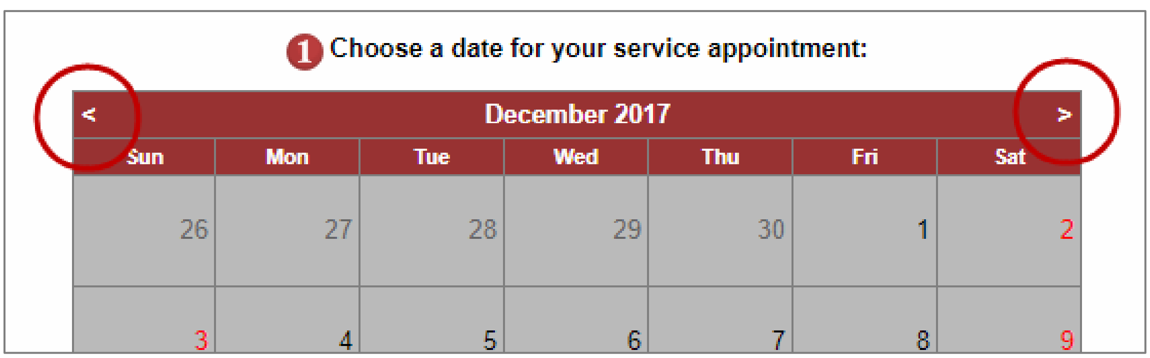
4. Click the hyperlink to open the scheduling calendar.



Days that are available for scheduling display in white. Days that are unavailable display in dark grey. Light grey days show for days in the next month.

5. To schedule a day, click one of the available days.

Note: To see more days, click the arrows in the top-left and top-right corners to navigate from month to month.

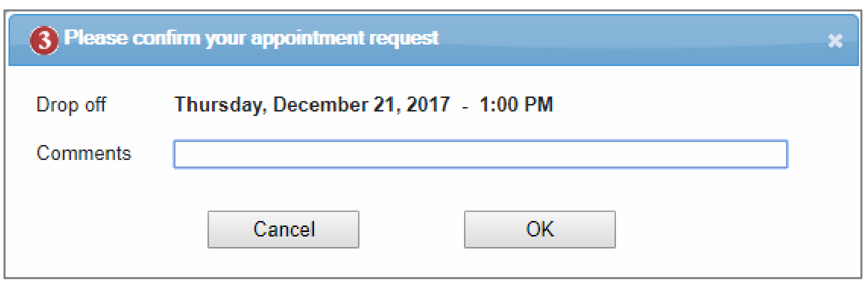


The drop-off time area displays.

Note: Times that display here depend on both the Customer Scheduling Options section in the Location Settings Profiles section, and the calendars set in the Shop Activity modules for the location.

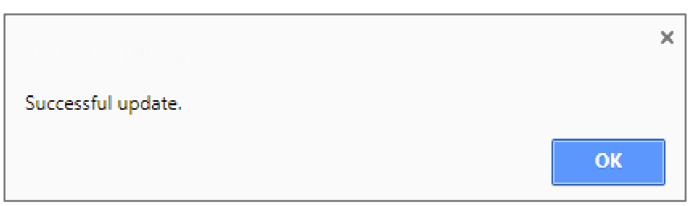
6. Click one of the available times to set a drop-off time.

   A dialogue displays to confirm your time selection.



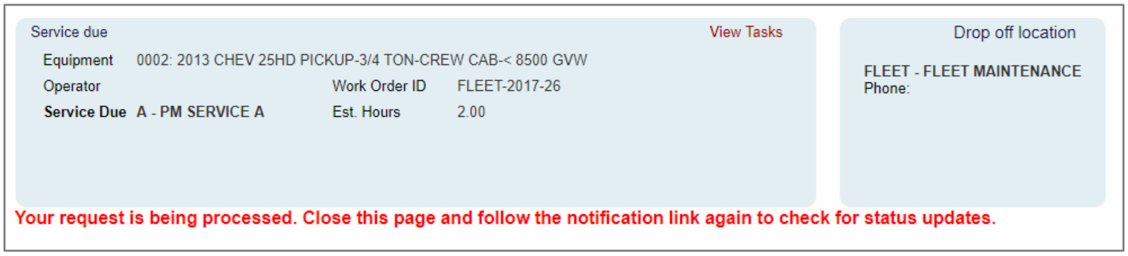
7. Enter a comment or relevant message regarding the appointment.
8. Click **OK** to save your appointment, or click **Cancel** to choose a different time.

   A confirmation message displays when the appointment is created.

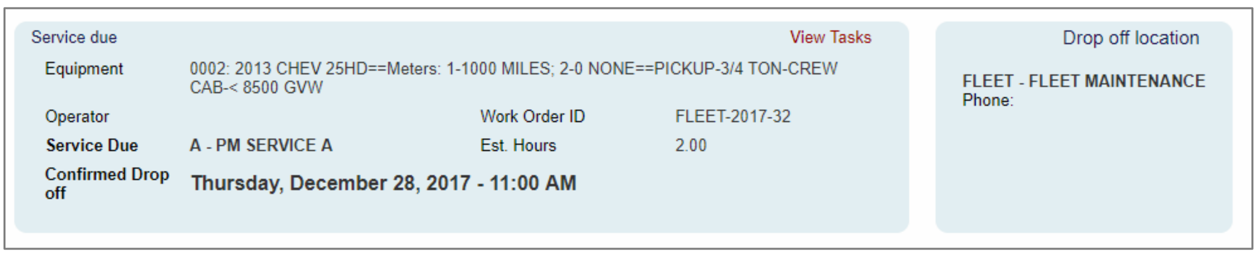


9. Click **OK**.

10. The scheduling page updates and displays a message that your request is being processed. At any point forward, come back to this page to check the status of the request.



Note: When you click the schedule link to check the status after an appointment is approved, the page displays new information for your confirmed appointment as shown below.

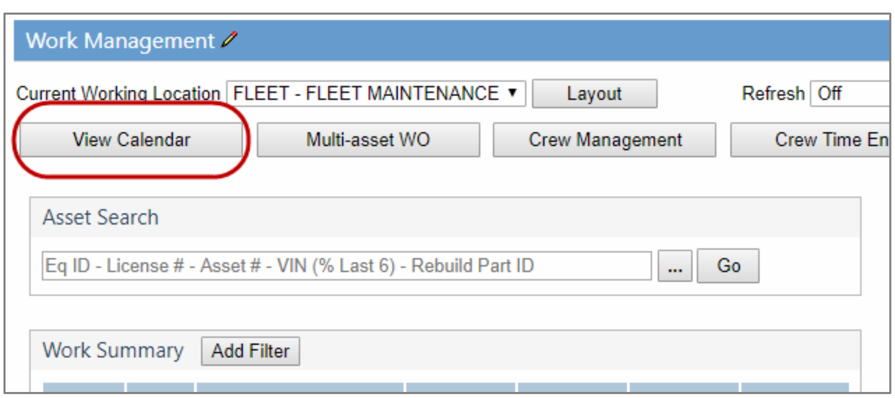


Approving or Denying an Appointment

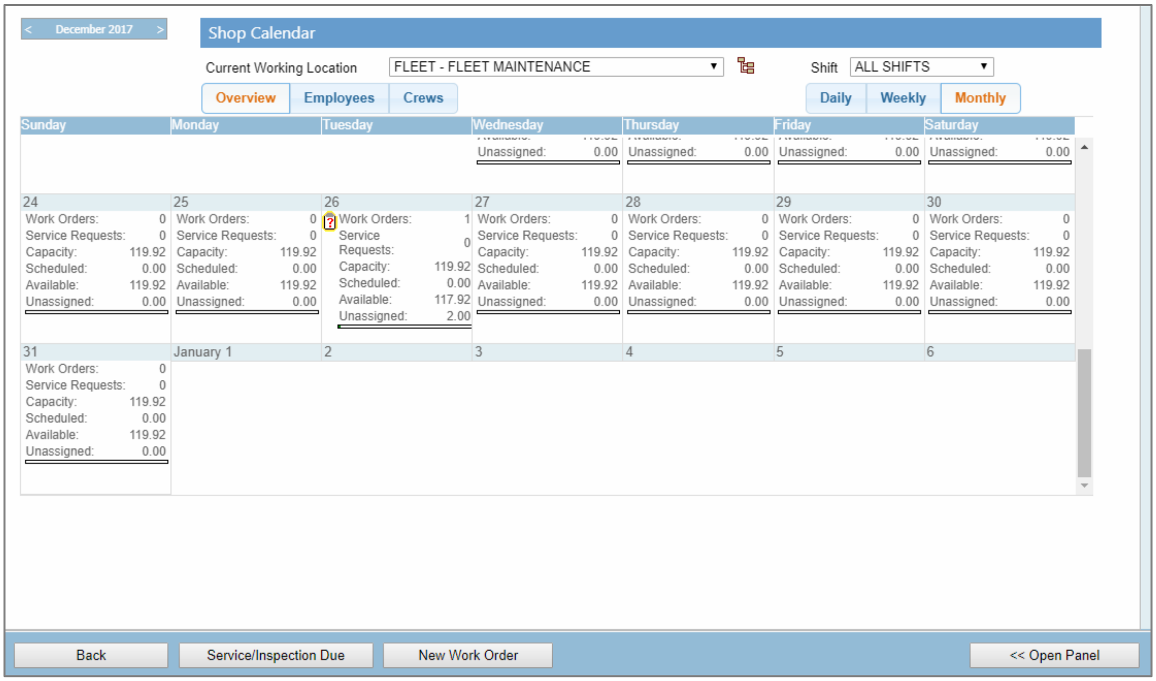
After an appointment has been scheduled by a user, it falls to a supervisor to be approved or rejected. The following process is used for both items.

To approve or deny an appointment:

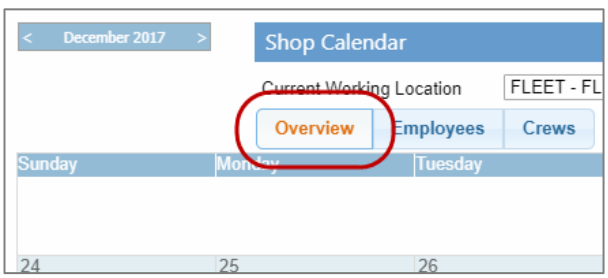
1. Open the Work Management portal.
2. On the main Work Management page, click **View Calendar**.



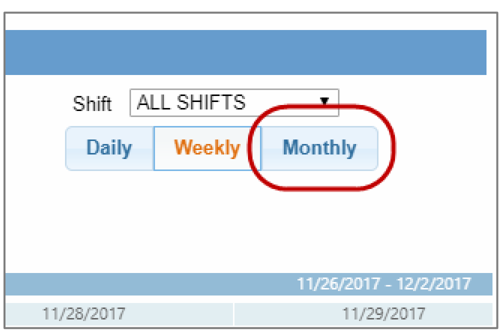
The Shop Calendar page displays.



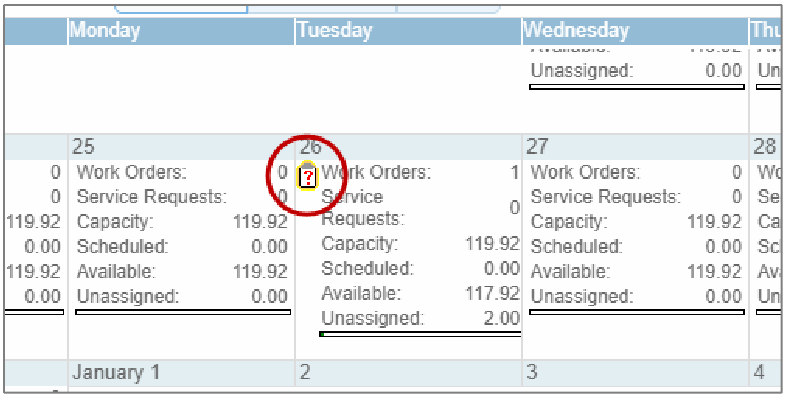
3. Click **Overview** to view the calendar details.



4. If you are on any view other than monthly, click **Monthly** to display the month calendar view.

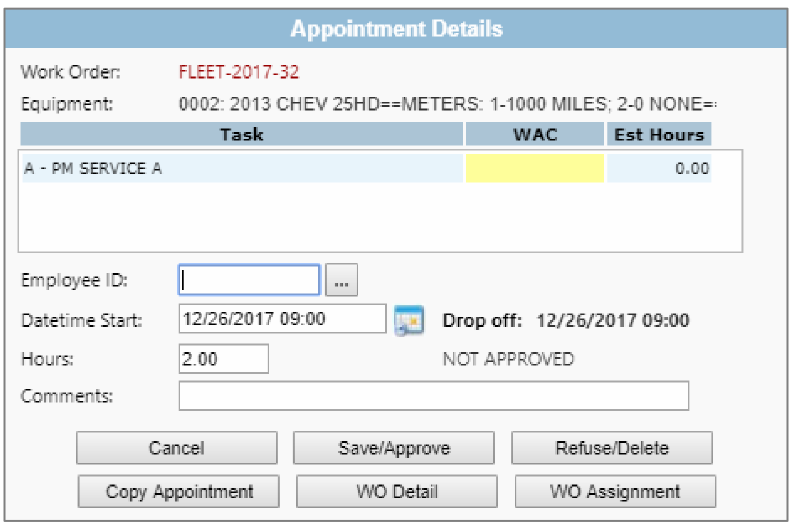


5. Scroll down the calendar to find the item needing approval. Any appointments needing approval are marked with a question mark icon.



6. Click the appointment icon.

   The Appointment Details pop-in displays. There are several buttons available on this pop-in. For this workflow, only the Save/Approve and Refuse/Delete buttons are described. For more information on the other buttons and fields, refer to the Shop Activity Supervisor User Guide, Section 7. The Shop Calendar.



7. Approve or reject the appointment.

   To approve the appointment:

   i. Add an employee in the **Employee ID** field if desired.

      Note: You can change the date if needed, or reject the appointment to cause the user to choose another date for the appointment.

   ii. If the user added a comment, it displays in the **Comments** field. Add or change the comment as necessary.

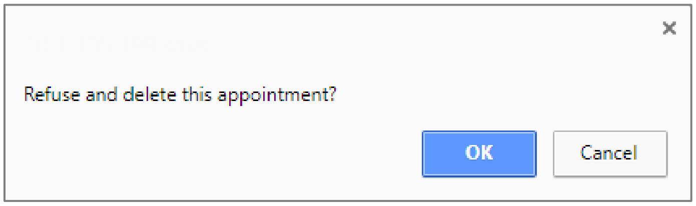
   iii. Click **Save/Approve** to approve the appointment for the date and time set.

The appointment is approved and displays a successful save message.

To reject the appointment:

i. Click **Refuse/Delete** to delete the appointment for the date and time set.

A confirmation message displays.



ii. Click **OK**.

The appointment is deleted. The user then gets a message the appointment has been cancelled and needs to reschedule the appointment.

Approved or Refused Requests

After an appointment has been approved or rejected, users received notification for information or further action.

Approved Appointments

Once an appointment has been approved, no further action is taken by the system.

Refused Appointments

If an appointment has been rejected by a supervisor (or the selected approver), the user receives a message that the appointment request has been refused, and they can use the link to schedule another appointment time.