

Version 25



Trapeze

Enterprise Asset Management

Documoto

Configuration Guide

Trade Secret | February 2026

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Technical Support

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

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

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

E-mail: cc@trapezegroup.com

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

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

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

Product Compatibility

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

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1. Overview

The asset management system allows users to access digital part catalogs to view part assemblies, find individual parts, and review asset documentation.

This document focuses on the setup required to support the Documoto illustrated parts catalog.

This will require some assistance from Documoto support staff. Please read through this guide and reach out to Documoto with the next steps that you need from them.

2. Configuring EAM

Deploying EAM

As of version 19.0, Documoto makes requests to EAM's Data Services REST API and Web Modules part catalog SOAP web services across the public internet. This requires that these two applications be publicly available.

When installing EAM on premises, the customer's IT department will need to setup a DMZ in their network and host a VM inside of it to run our software. This VM will need:

1. To be accessible across the internet.
 - i. For additional security, IT can whitelist Documoto's IP addresses for inbound traffic in the Firewall. This does add technical complexity and can make it more difficult to troubleshoot why the integration is not functioning.
2. To be able to talk to the database on the internal network.
 - i. The standard MSSQL or Oracle database ports will need to be opened between the DMZ VM and the EAM database server on the internal network.

If the customer is hosted in Trapeze Cloud, the Data Services API and Web Modules should already be publicly available. Take special consideration of this if implementing a VPN requirement to access the web services.

Data Setup

API Licensing & Integration

An EAM API license is not required for this functionality; however, EAM Data Services API must be running and accessible via a public URL so that Documoto can integrate with it.

Web Modules Portals & Settings

Illustrated Parts Catalog Portal

Access to Documoto is facilitated through a portal called Parts Catalog.

1. If you have a parts catalog portal tab already, skip to step two. If not, do the following:
 - i. Log into Web Modules as an admin user.
 - ii. Click on **Admin** and click on **Admin Center**.

- iii. Click the **Add New Tab** button.
 - iv. Provide an adequate name for the tab in the Tab Name textbox (for example, Parts Catalog, IPC, or Documoto).
 - v. Select the authorized user roles / groups that should have access to it. Any users of Technician / Work Management portals should have access to it.
 - vi. Select **Parts Catalog Portal** in the Module Type dropdown.
 - vii. Click the **Add to Organize Modules Below** button.
 - viii. Click the **Save** button.
2. Configure the Parts Catalog portal module settings.
- i. Click on the Parts Catalog tab in Web Modules.
 - ii. Click the edit pencil to modify the module's settings.
 - iii. Provide the User Name, Tenant Encrypted Key, and Parts Catalog URL that was given to you by Documoto.
 -  The URL must be just the base URL and should not have any extra pathing after the base URL. Otherwise, the default document redirect will not work.
 - iv. Example URL formats
 - a. <https://mytansit.integration.documoto.com>
 - b. <https://integration.documoto.com>
 - v. Click the **Save** button.
 - vi. Verify access by clicking the **Illustrated Parts Catalog (IPC)** button.

This should launch Documoto in a new tab and sign you in automatically.

Technician & Work Management portals

Access any Technician and Work Management portals as a system admin and do the following to them.

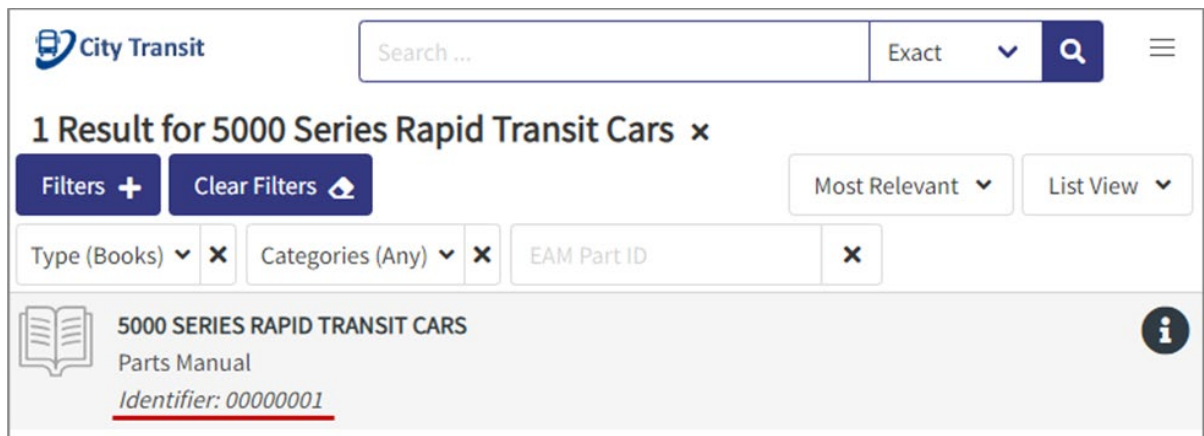
1. Click the edit pencil to modify the module's settings.
2. Scroll down to the **Parts Actions Settings** section.
3. In the **Configured Parts Catalog** dropdown, select the Parts Catalog tab that you made in the prior step.

4. Click **Save**.

Default Catalog for Asset

You may end up with tens or hundreds of part catalogs loaded in Documoto. Rather than having users search through all of them to find the relevant catalog, we support mapping the catalog identifier to Equipment Types. When this is configured and the user opens Documoto, the system will automatically take the user to the mapped catalog.

1. Sign into Web Modules as a system admin.
2. Launch the Equipment Types screen, then switch back to your main Web Modules tab.
3. Go to the Parts Catalog tab and click the button to launch Documoto.
4. Click into the search textbox and search for your catalog.
5. Find your catalog in the list of results. Its related identifier will be shown below its name. Copy this identifier.



6. Switch to the Equipment Types screen window that you opened earlier.
7. Search for any Equipment Types that you want to automatically map to that catalog.
8. Edit the record(s) and paste the catalog identifier you copied earlier into the Document ID field.
9. Save the screen.

Any time that a user opens Documoto from a Work Order against an asset with one of those Equipment Types, they will be taken directly to that catalog.

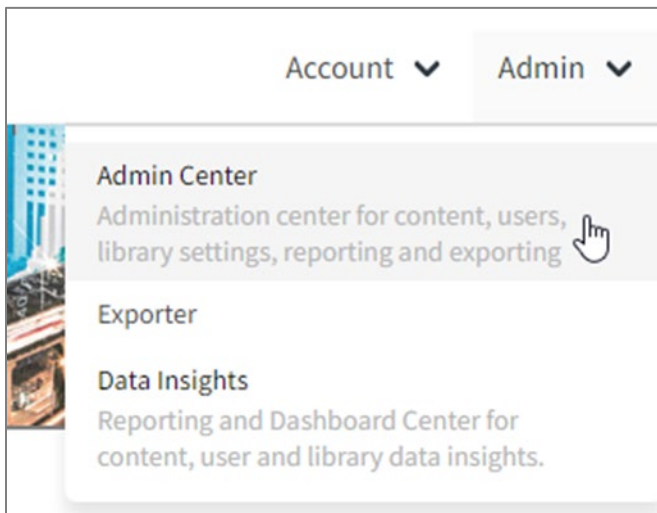
3. Configuring Documoto

There are two URLs that need to be configured in Documoto so they can make web service calls to our SOAP and REST APIs.

Please reach out to Documoto staff to assist with this process.

ERP System Integration

1. Launch Documoto.
2. The current user is normally a view-only user. Log out of Documoto using their top banner.
3. You should have received separate admin credentials from Documoto staff for your Documoto tenant. Log in with those credentials.
4. Click on Admin and click on Admin Center.



5. Click on Users.
6. Click on Organizations, and then click on your Organization name in the table.
7. Click on the Integrations tab.
8. In the **Service URL** textbox, enter the following URL, replacing your domain name and IIS site name with your own. If EAM is installed on-premises, this will be the domain name and site name of your DMZ server Web Modules.
 - i. `https://domain/site/FAPartsCatalog/WS/PartCatalogWS.asmx`
9. Click the **Save** button.

Weekly Part Synchronization

1. Construct the URL to the Data Services API. If installing EAM on-premises, this will be the Data Services installed on your DMZ.
 - i. `https://domain:serviceport/`
 - ii. Use the port from Data Service's configurator.
2. Send this URL to your Documoto point of contact and tell them to use it for your nightly part synchronization script.

4. End User Workflows

Part Requests / Issues

The primary workflow that Documoto is used for is requesting / issuing parts for a work order. When the technician is not sure what the Part ID is, they may open Documoto, view the part diagram, and select the specific part. The system will automatically look up the related Part ID and create a part request or part issue.

1. Sign into Web Modules and access Technician or Work Management portal.
2. Go to a work order whose asset has a valid Equipment Type Document ID.
3. Click on the Part Actions button.
4. Pick if you are going to request parts or issue parts.
5. Click on the IPC button in the action bar.
6. Navigate through the part assemblies and find your part.
 - i. You may either click the part on the diagram or find the part in the table.
7. Click the Shopping Cart icon in the table of data.

#		EAM Part ID	Name	OEM Part Number	Quantity
			. PILOT INSTALLATION (SEE FIG. 2-03 FOR DETAIL BREAKDOWN.)	076-493002	REF. EA
1		1550223^0	. PILOT BLADE	42120217S	2 EA
2		4520050^0	RETAINER : PLATE, PILOT BLADE,	A4930008	2 EA

8. Specify the number of parts you want.

Add

. PILOT BLADE

42120217S

Quantity

-

2

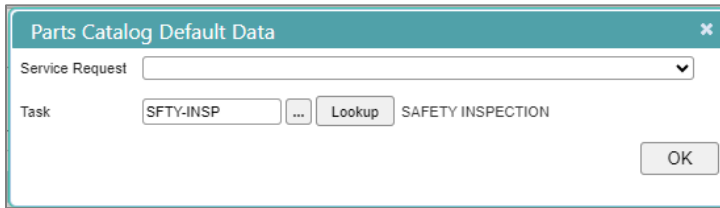
+

Add

Cancel

9. Click Add.
10. Click Done in the lower-right corner.

11. A dialog will be displayed in Web Modules to confirm the Task ID and/or Service Request ID. Click OK.



12. The parts will have been added as pending requests or issues.
 - i. If there is no mapped EAM Part ID and/or no defined cross references, then the OEM Part ID and description will be entered as a description on the part request.

Part Quantity on Hand

When viewing a part in Documoto, if Documoto was launched from the context of a work order, the user will be able to see the current quantity on hand in the part details view in Documoto. This quantity on hand will be for either a) the work order location or b) the location that supplies the work order location.

To view part quantity on hand:

1. Navigate to a work order in EAM.
2. Open the Parts Actions dialog.
3. Click the IPC button.
4. Navigate through to a part that has a cross-reference and/or EAM Part ID mapped to it.
5. Click on the Part ID to view its details page.

The quantity on hand will be shown underneath a label called “AVAILABILITY”.

City Transit

Search ... Exact Q

Search / ... / . PILOT BLADE

Info 3 Comments Related Where Used 2 Suggestions 2

. PILOT BLADE
OEM Part Number: 42120217S
Created on: Jun 11, 2018
Last updated on: May 7, 2019

AVAILABILITY 256

- 1 + Add

Filter

EAM Part ID:	1550223^0
UO Code:	A, B

Weekly Part Synchronization

Documoto will maintain a mapping of their OEM Part IDs to EAM's internal Part IDs. Quite often the Part IDs in EAM do not match the OEM Part IDs. Having these two IDs mapped to each other means that when a technician requests / issues a part for their work order, they can use the EAM Part ID for it.

These part mappings are defined in EAM on the Part Cross-references screen.

Documoto has an automated process that will reach out to EAM's API, query all the Part Cross-references, and update the mappings in their system.

To setup the Part Cross-references in EAM:

1. Launch the Parts – Cross-references screen.
2. Insert a new record.
3. Set the Part ID and Part Suffix fields to the EAM Part ID and Part Suffix.
4. Set the Cross-reference Part ID to the OEM Part ID from Documoto.
5. Set the Cross-reference part suffix to 0.
6. Set the Cross-reference manufacturer to the part's supplied from Documoto.

7. Set the Association type to “TWO-WAY”.
8. Save the record.

Parts - Cross-references

Search Reload Sort Select Filter Select Sort

EAM Part ID / Suffix

Part ID EAM PART ID
Part suffix 0

Basic Info

Vendor for reference part ID
Manufacturer for reference part ID

MFG Part ID from IPC Parts Book

Cross-reference part ID MFG PART ID FROM DOCUMOTO PARTS BOOK
Cross-reference part suffix
Cross-reference vendor ID
Cross-reference manufacturer ID DOCUMOTOSUPPLIER KEY (MFG)

Association type TWO-WAY ONE-WAY

Manufacturer ID (Documoto Supplier Key)