Version 25 | Trapeze Enterprise Asset Management

Equipment Planning

Administrator 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.

Equipment Planning - Administrator Guide

Version 25.x

February 2025

Contents

1. Overview

The Equipment Planning Module is designed as an easy to use, browser-based interface to assist with replacing dated equipment and adding new equipment to an organization.

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. Equipment Planning Setup

Following is background information regarding Equipment Planning setup. The following areas must be defined in the system for the Equipment Planning module to work properly.

Miscellaneous Event Types

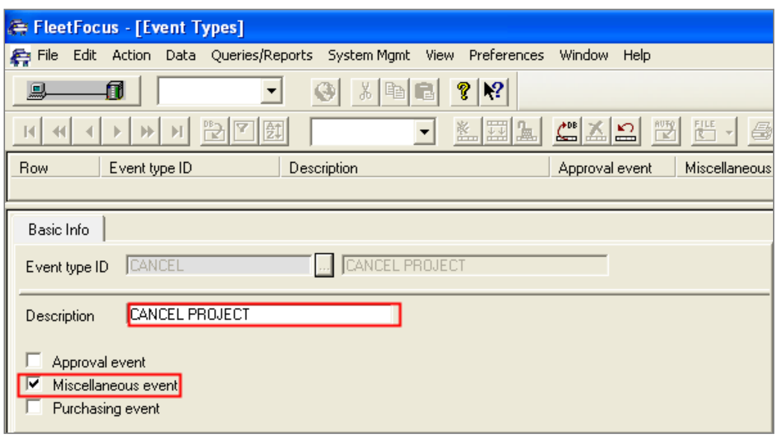
Miscellaneous event types must be defined to be able to associate to employees. To setup miscellaneous event types, follow the menu path:

Data > Equipment Management > Equipment Planning > Setup > Event Types

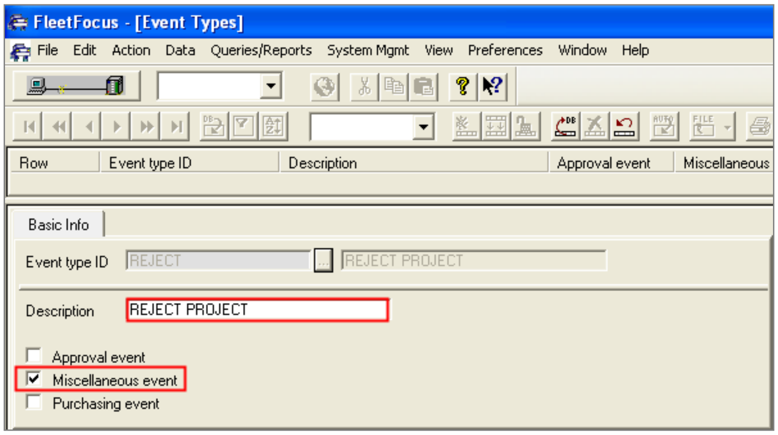
The following event types should be established as Miscellaneous Events:

- CANCEL: Allows users to cancel projects.
- REJECT: Allows users to reject projects.
- JUSTIFY: Allows users to justify projects.

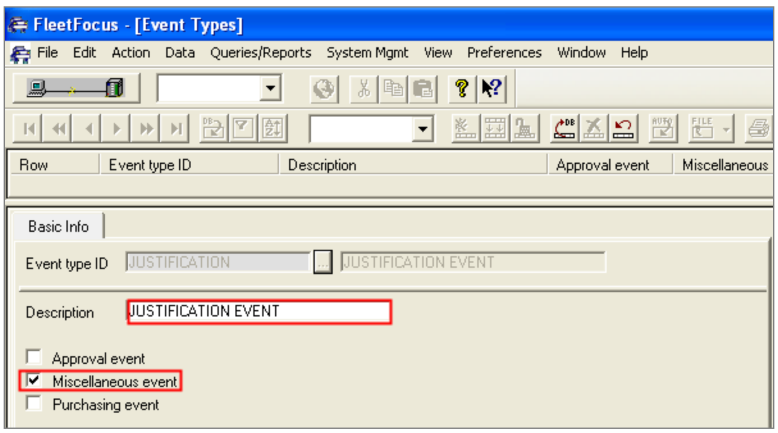
The following screenshots provide details of the required fields for the above Miscellaneous Event setup.



Setup Miscellaneous Event Type: Cancel Project



Setup Miscellaneous Event Type: Reject Project



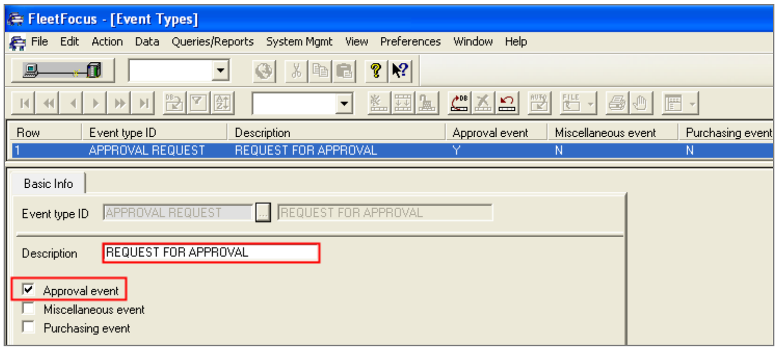
Setup Miscellaneous Event Type: Justify Project

Approval Event Types

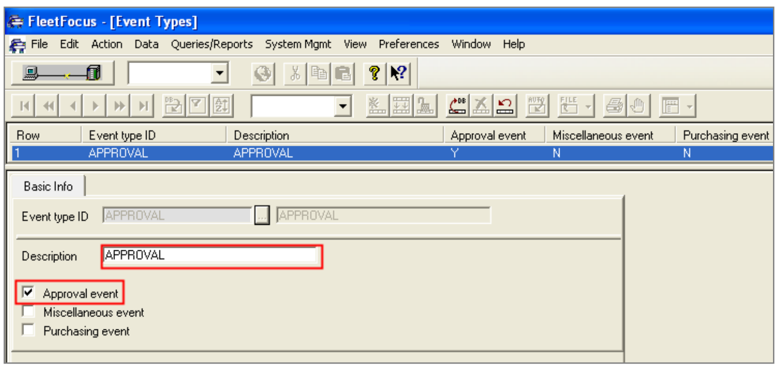
Approval Event Types must be defined to be able to associate to employees. To setup approval Event Types, follow the menu path: Data > Equipment Management > Equipment Planning > Setup > Event Types. The following Event Types should be established as Approval Events:

- REQUEST APPROVAL: Allows users to forward projects to Event Approvers for approval.
- APPROVAL: Allows users to approve projects.
- FINAL APPROVAL: Allows users to give last and final approval required before equipment is ordered.

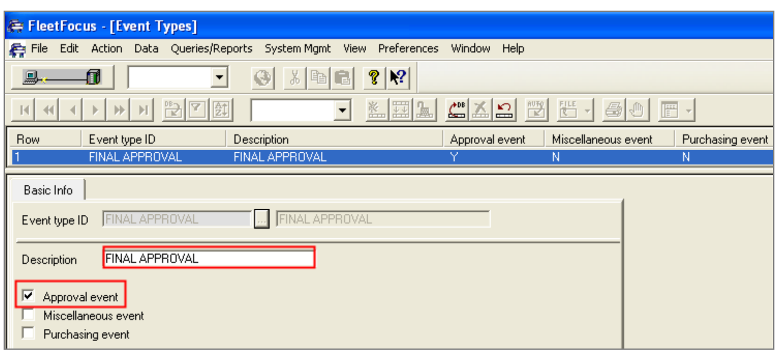
The following screenshots provide details of the required fields for the above Approval Event setup.



Setup Approval Event Type: Request Approval



Setup Approval Event Type: Approval



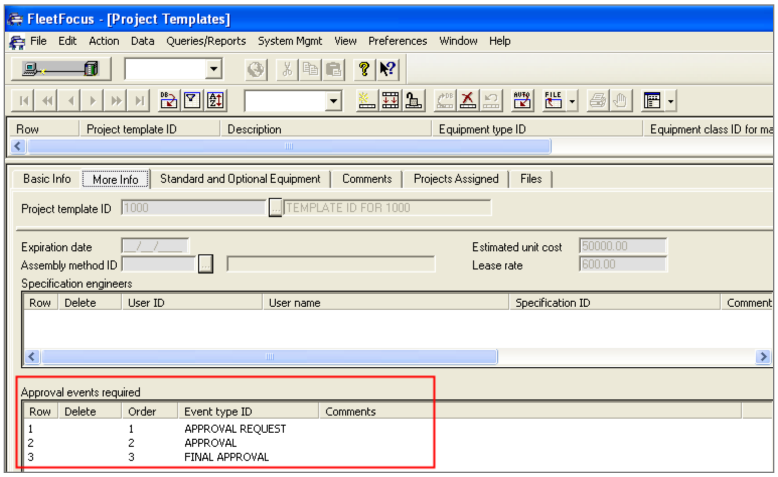
Setup Approval Event Type: Final Approval

Project Template Required Approval Events

The GUI or Enterprise Portal may be used to define project templates. An element of the project template is an approval events required structure (for example, approval level 1 and approval level 2) which defines the approval process for a project using the particular project template.

After setting up the approval event types, they must be associated within the project templates screen to define the number/level of required approvals for each associated project to be considered completed.

Approval events are entered in the order in which they are to be obtained (such as first level to highest level). This approval event required structure applies to all projects that use this particular project template (although the specific approving employees may vary by department).



Departments

Departments must be defined with detail including the Responsible employee ID. Then the Roll-up relationships must be established by defining the various Department Types:

Base (level 1)

OR

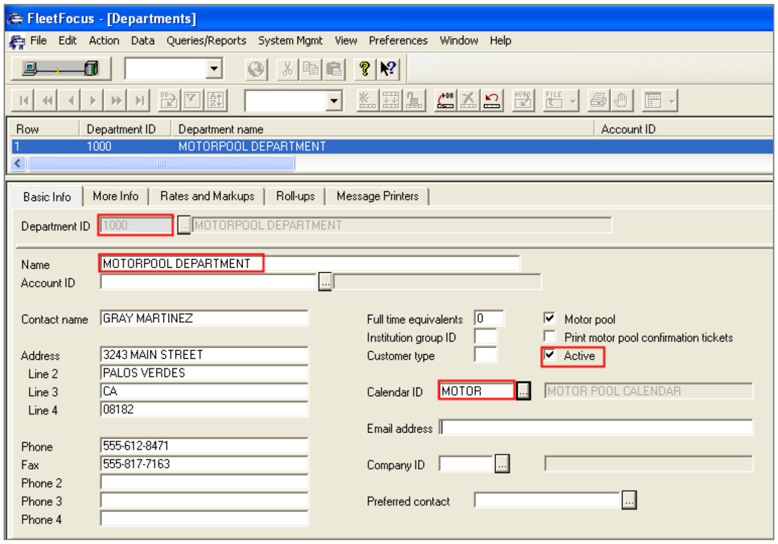
Higher (level 2)

To set up Departments (and the responsible employee for the department), Department Types, and Department Roll-up relationships, follow the menu path: Data > Setup > Organization Structure > Departments > Primary Information.

The following screenshots provide details of the required fields for the Department setup.

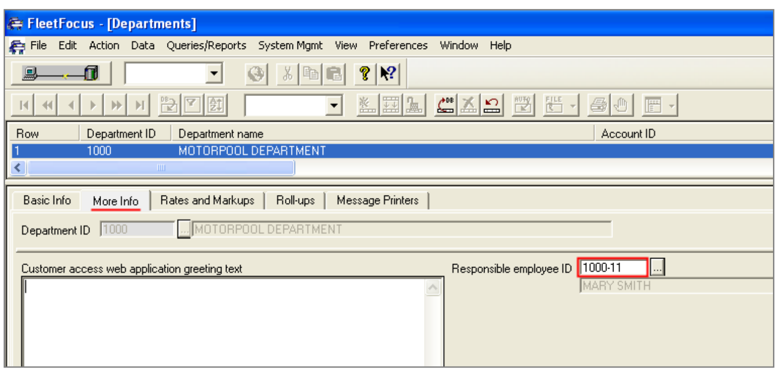
Define Departments

To define departments, it is necessary to complete the following required fields: **Department ID**, **Name**, **Active**, and **Calendar ID**.



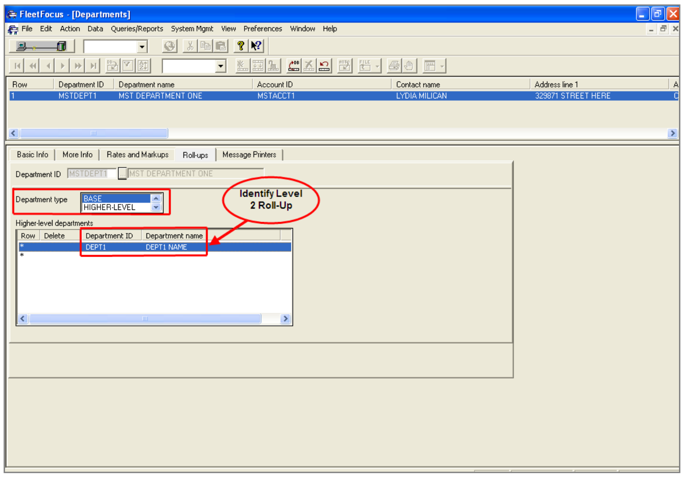
Associate a Responsible Employee ID to the Department

Upon defining the department, you must associate a responsible employee ID with the department as shown in the screenshot below.



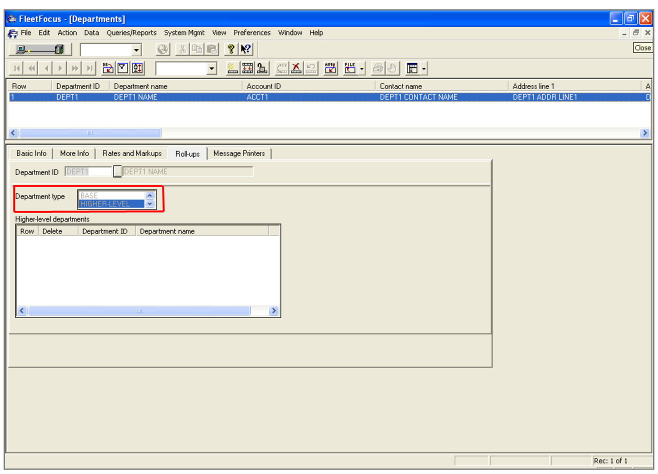
Department Type – Base Level

Continue setting up the departments by defining the roll-up relationships in your organization. Identify the department type by indicating the base level and higher level department as shown in the screenshot below.



Department Type – Higher Level

To complete the department setup, establish the higher level department type by selecting higher for the department type on the higher level department's Roll-ups tab.



Employees

Employees must be defined including detail about their event level approval authority and supported departments. To setup employees, follow the menu path: Data > Shop Activity > Setup > Employees > Primary Information.

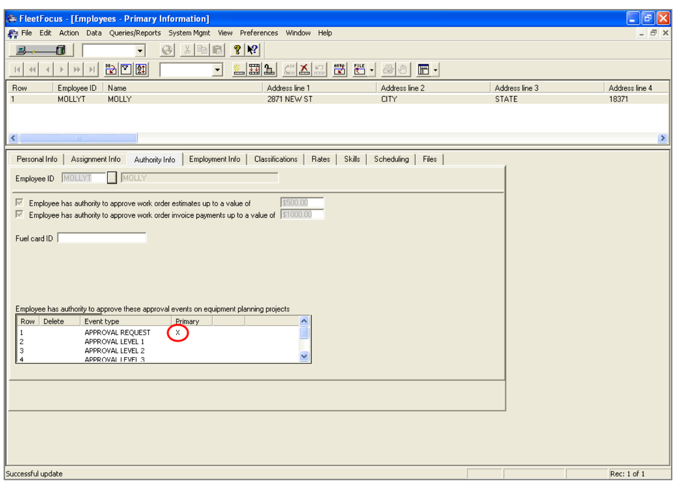
The following sections provide details of the required fields for the employee setup.

Employee – Primary Event Type

The primary check box for each event type grants access to notifications and filtering within the Equipment Planning module:

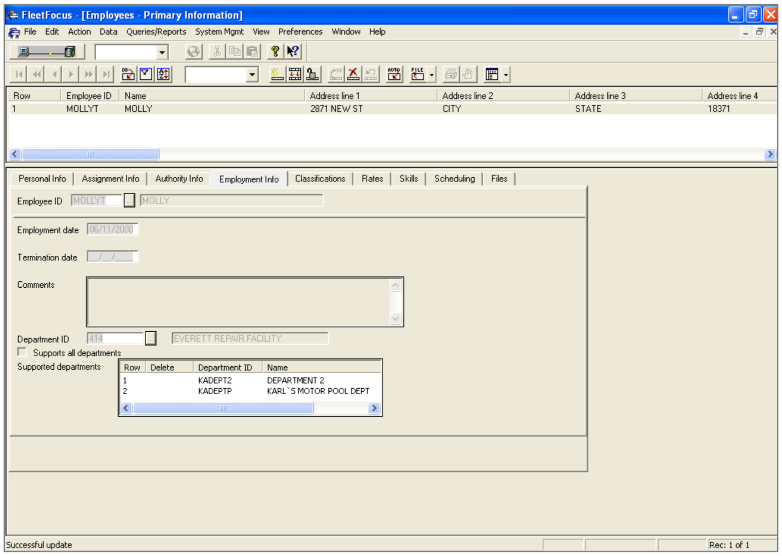
- Notifications: When a project passes each event type phase, the associated primary employees are notified. Defined phases as outlined above include: Request Approval, Approval, and Final Approval.
- Filtering: When viewing My Approvals, web modules show only those projects awaiting the user’s primary approval level.

Note: An event type can have multiple primary employees. However, an employee can only be primary to one approval event.



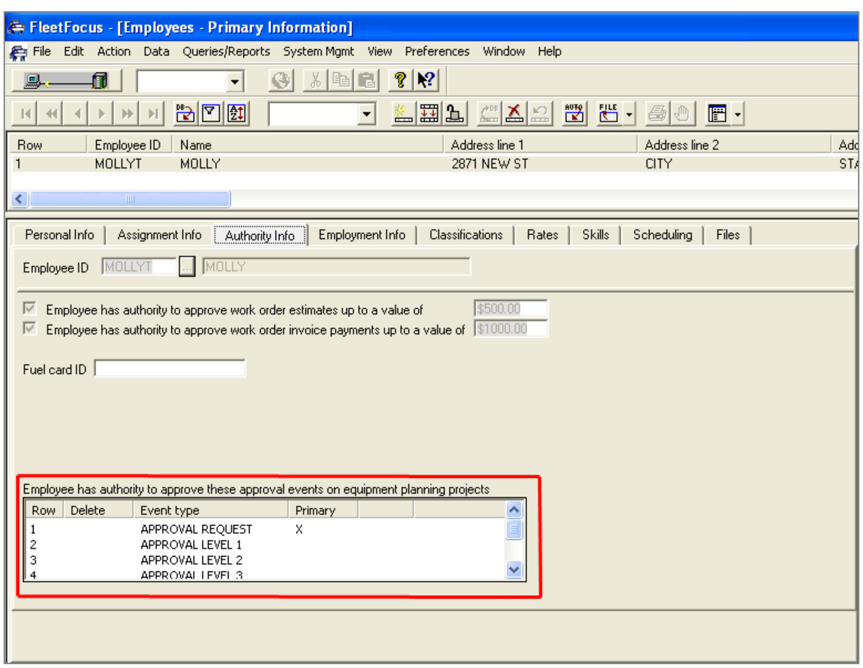
Employee – Supported Departments

Each Employee ID supports one or more departments, which are defined using the GUI or Enterprise Portal. This definition determines what equipment IDs and project IDs a user can see through web modules.



Employee ID – Approval Event Authority

Each employee ID has authority to approve one or more approval events, which are defined using the GUI or Enterprise Portal. This definition determines which events of a project a user can action through web modules. Each employee ID has an approval attribute that authorizes him or her to approve a particular level of approval events.



Using this definition for Approval Event authority, organizations may enable a user to see all pending approvals for which their Employee ID has authority (i.e., they are able to see his or her pending approvals, as well as those pending for lower level approvers for his or her Department).

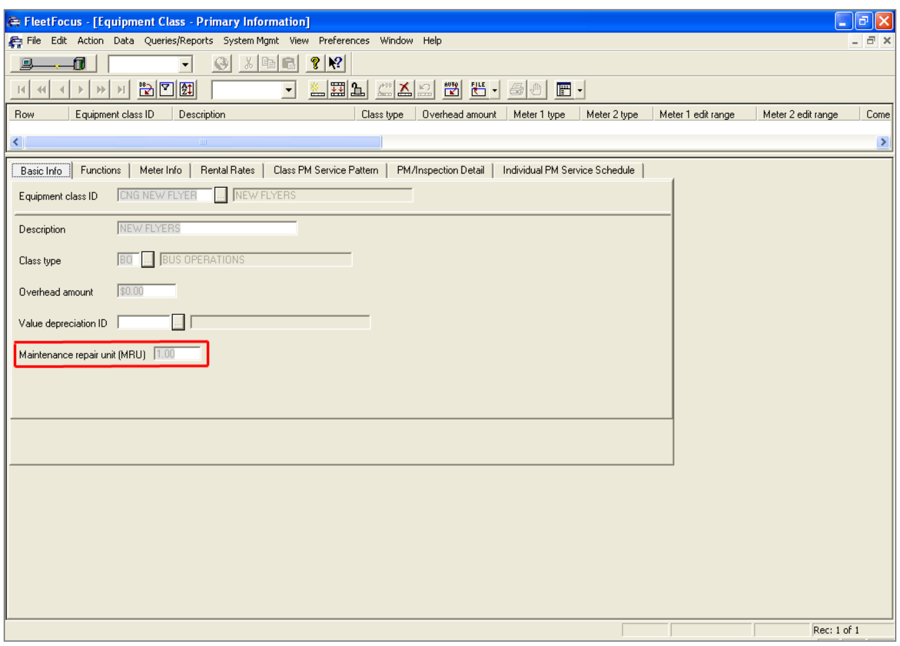
An employee is allowed to give approval to any approval event defined in the list. However, only the projects expecting that employee's Primary approval event(s) are visible via the "My Approvals" filter.

Organizations may require different levels of approval. For example, a company may require 2 levels of approval by 2 different people prior to the 3rd and final approval. Therefore, a level 2 approval cannot approve projects waiting for level 1 approval. Approvers can only approve at the levels for which they are authorized.

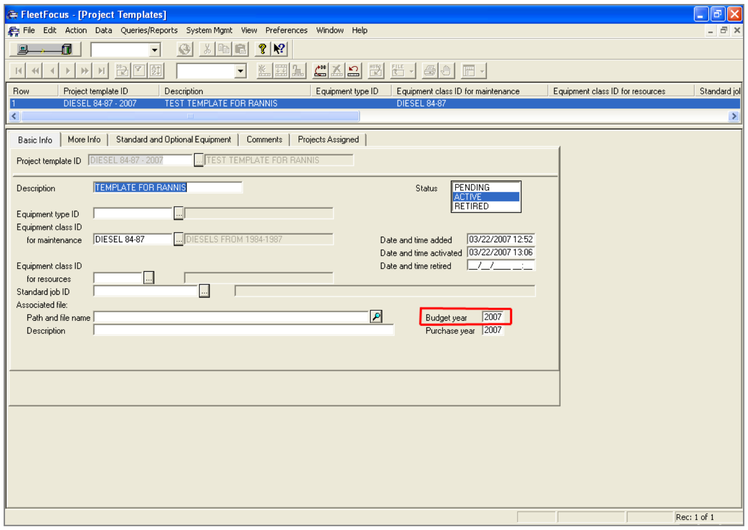
Defining Additional Fields

The following additional fields may be defined in for use in Equipment Planning.

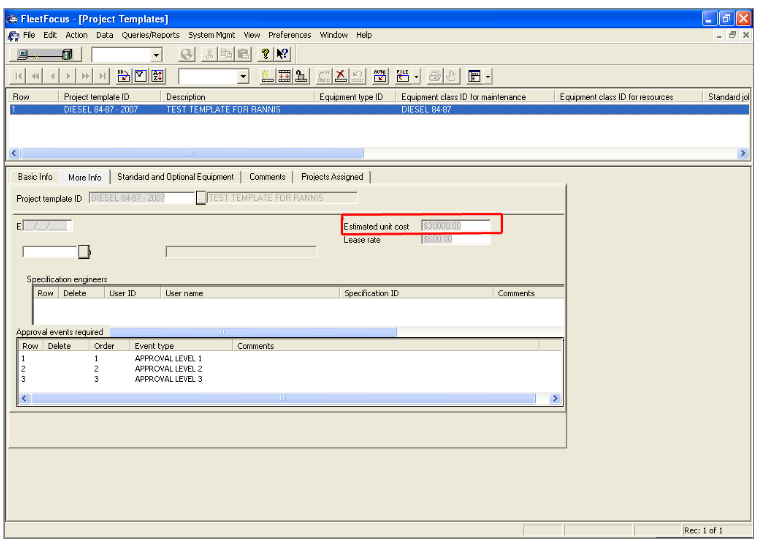
Maintenance Repair Unit (MRU): To define MRU in, follow menu path Data > Equipment Units > Setup > Equipment Class > Primary Info as indicated in the screenshot below.



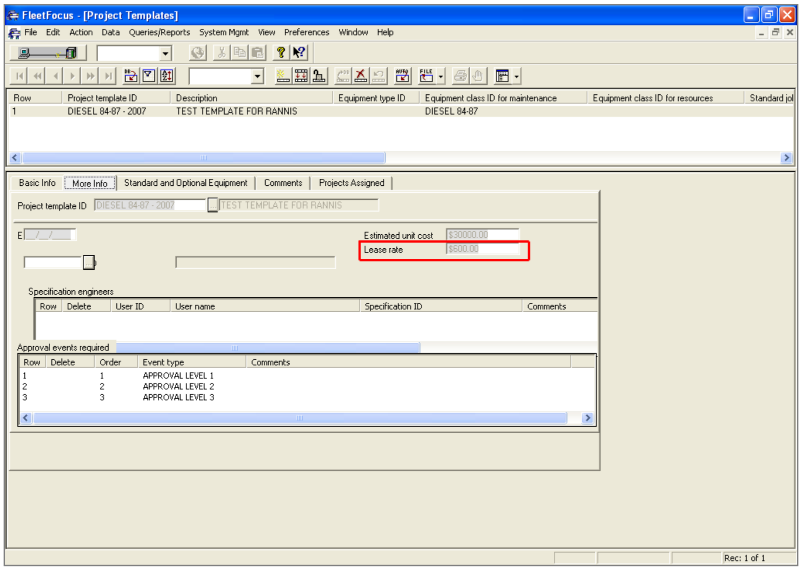
Budget Year: To define the Budget Year in, follow menu path Data > Equipment Management > Equipment Planning > Templates as indicated in the screenshot below.



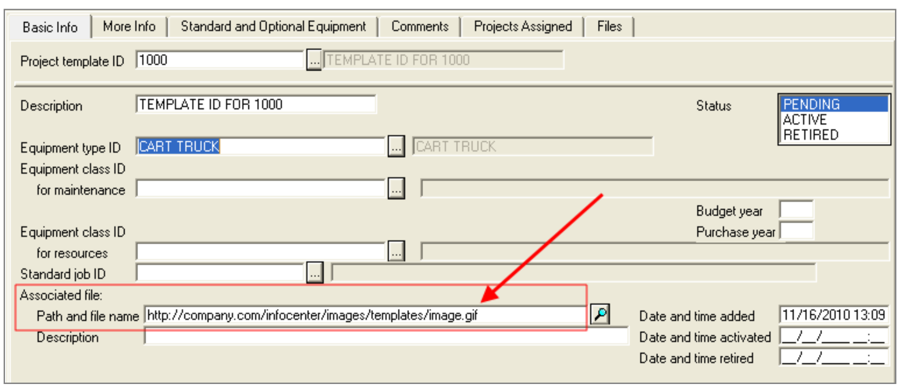
Budget Amount: To define the Budget Amount in, follow the menu path Data > Equipment Management > Equipment Planning > Templates as indicated in the screenshot below.



Lease Rate: To define the Lease Rate in, follow menu path Data > Equipment Management > Equipment Planning > Templates as indicated in the screenshot below.



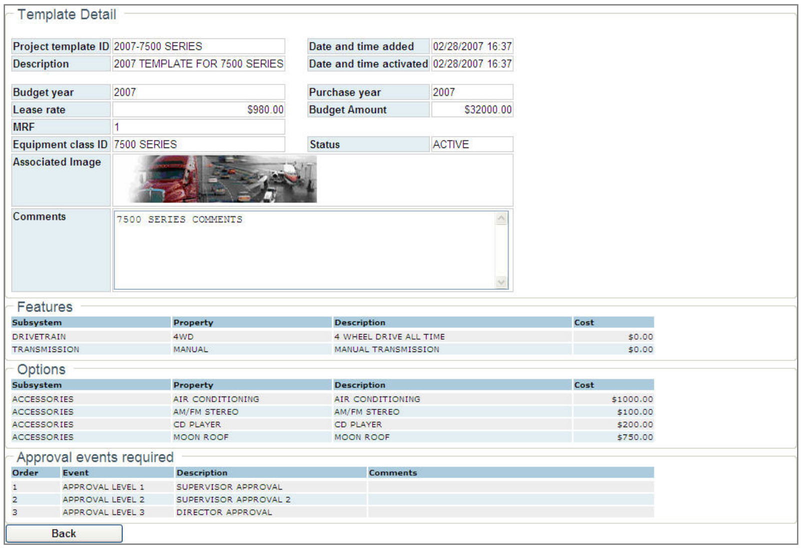
Associated Image: To define the link to an associated image, follow menu path Data > Equipment Management > Equipment Planning > Templates as indicated in the screenshot below.



Helpful information regarding Associated Image:

It is important to test the URL in the browser prior to setting the URL on the template screen.

For example, if the following is the WEB URL to your image file: http://www.google.com/intl/en_ALL/images/srpr/logo1w.png, paste this URL into the IE address bar and view it. Confirm that you can see the image. Then paste the URL (EXACTLY as it appears in the address bar) into the **Path and file name** field on the Project Templates screen. When you view the Template Detail page, you will see the image as shown below.



Template Detail

Project template ID	2007-7500 SERIES	Date and time added	02/28/2007 16:37
Description	2007 TEMPLATE FOR 7500 SERIES	Date and time activated	02/28/2007 16:37
Budget year	2007	Purchase year	2007
Lease rate	$980.00	Budget Amount	$32000.00
MRF	1		
Equipment class ID	7500 SERIES	Status	ACTIVE
Associated Image			
Comments	7500 SERIES COMMENTS		

Features

Subsystem	Property	Description	Cost
DRIVETRAIN	4WD	4 WHEEL DRIVE ALL TIME	$0.00
TRANSMISSION	MANUAL	MANUAL TRANSMISSION	$0.00

Options

Subsystem	Property	Description	Cost
ACCESSORIES	AIR CONDITIONING	AIR CONDITIONING	$1000.00
ACCESSORIES	AM/FM STEREO	AM/FM STEREO	$100.00
ACCESSORIES	CD PLAYER	CD PLAYER	$200.00
ACCESSORIES	MOON ROOF	MOON ROOF	$750.00

Approval events required

Order	Event	Description	Comments
1	APPROVAL LEVEL 1	SUPERVISOR APPROVAL	
2	APPROVAL LEVEL 2	SUPERVISOR APPROVAL 2	
3	APPROVAL LEVEL 3	DIRECTOR APPROVAL	

Back

It is recommended to place an image file into the InfoCenter Images folder. Make sure that the path is one that you can access via an URL in the form HTTP://hostname/folder/filename.img.

Note: Be sure to avoid conventions like localhost, etc.

Assuming that your path to Web Modules looks like this: http://company.com/webmodules/ and that you have dropped the file image.gif into a folder named the following:

- c:\company\FASuite\<DeploymentName>\webmodules\web\images\templates\

Then your image URL will be http://company.com/webmodules/images/templates/image.gif.

3. Install/Upgrade Equipment Planning Module

Please refer to the Administrator Guide – Install/Upgrade Steps and Web Modules Configuration, Adding Modules and Tabs sections for instructions on installing and upgrading modules.

4. Add an Equipment Planning Tab to Web Modules

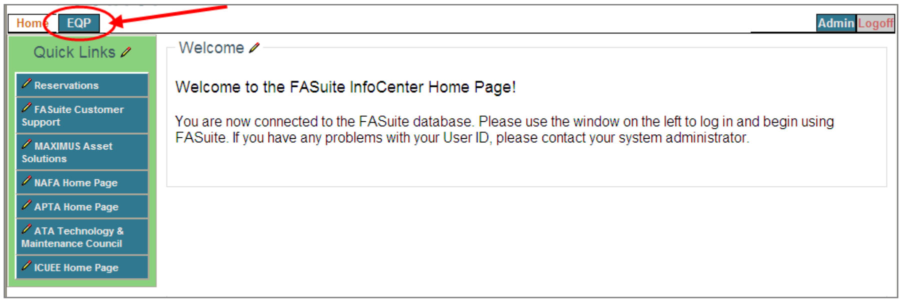
Once you have installed the Equipment Planning Module, you will need to add a tab to your Web Modules installation for the Equipment Planning Module definition to make the functions of Equipment Planning available to Web Modules users.

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.

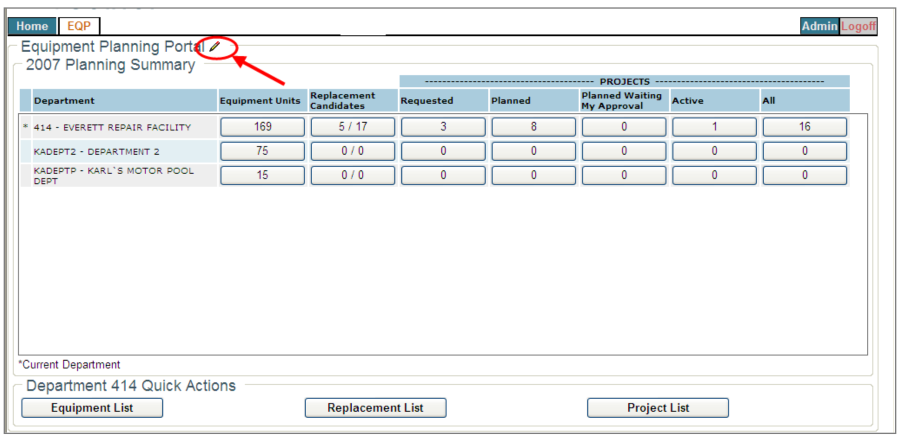
5. Configure Equipment Planning

Follow the steps below to configure the Equipment Planning Module.

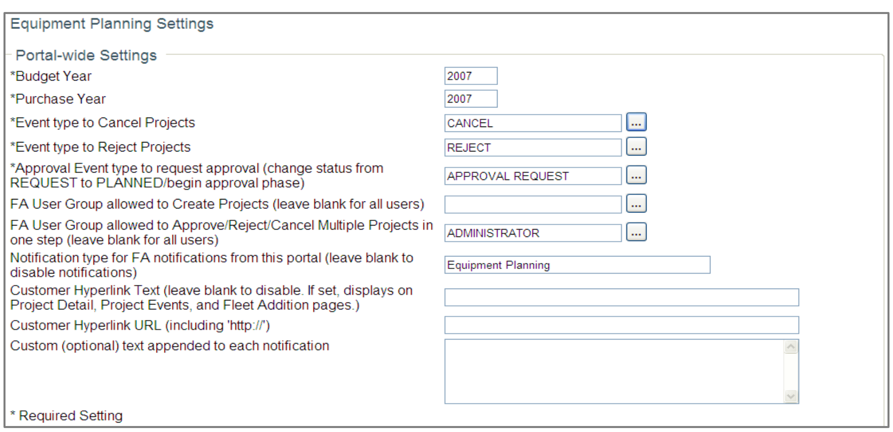
1. While logged into Web Modules as an administrator, click on the tab for Equipment Planning.

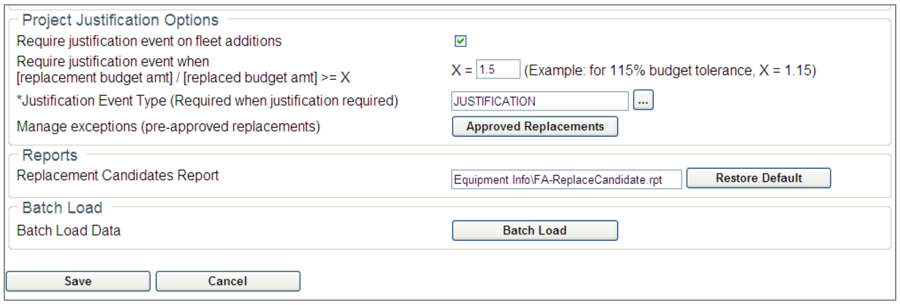


2. Click the pencil icon next to the module title bar to edit the Equipment Planning Portal settings.



The Equipment Planning Settings Page displays.





On the Equipment Planning Settings screen, you may configure the module according to your organization's use. Refer to the Portal-wide Settings, Project Justification Options, Reports, and Batch Load sections below for detailed instructions on configuring the module.

Portal-Wide Settings

The Portal-wide Settings section of the Equipment Planning Settings screen allows you to configure the following settings.

Note: An asterisk indicates a required setting.

- ***Budget Year:** Define the year the replacement/addition is budgeted.
- ***Purchase Year:** Define the year the equipment will be purchased.
- ***Event type to Cancel Projects:** Set the event type for project cancellation.
- ***Event type to Reject Projects:** Set the event type for project rejection.
- *Approval Event type to request approval (change status from REQUEST to PLANNED/begin approval phase): Set the approval event type to request approval.
- **User Group allowed to Create Projects (leave blank for all users):** Determine the User Group that has permission to create projects. If your organization allows all users to create projects, leave this field blank.
- **User Group allowed to Approve/Reject/Cancel Multiple Projects in one step (leave blank for all users):** Determine the User Group that has permission to approve, reject, and cancel multiple projects in one step. If your organization allows all users to approve, reject, and cancel multiple projects in one step, leave this field blank.
- **Notification type for notifications from this portal (leave blank to disable notifications):** Define the notification type for this portal (a code used to identify from where the notifications are coming).
- **Customer Hyperlink Text** (leave blank to disable. If set, displays on Project Detail, Project Events, and Fleet Addition pages.) : Define the customer hyperlink text. Leave the field blank if not using the hyperlink.

- **Customer Hyperlink URL** (including ‘http://’): Define the customer hyperlink text and URL.
- **Custom (optional) text appended to each notification:** Define the optional email text to be appended to each automatic email message. **NOTE:** Each email will include the following:

    From: <from email defined in settings>

    Subject: Project <ID> information

    Body:

        Auto Generated email Please DO NOT REPLY

        <Employee ID – Employee Description> has <Approved/Rejected/Canceled? <Project ID(s)> on <date>

        Project is currently in <status> status.

        <Optional text defined in settings>

Project Justification Options

In Equipment Planning, the Justification Rule is as follows: If the new unit’s budget amount before options (defined on the template for the class/year) is X% more than the old unit’s budget amount (also defined on template for the class/year), then justification is required. The system will force the user to populate the “Justification” before approving the project. Projects that require justification are highlighted in yellow.

The formula is: If (NewBudgetAmount/OldBudgetAmount >= 1.X

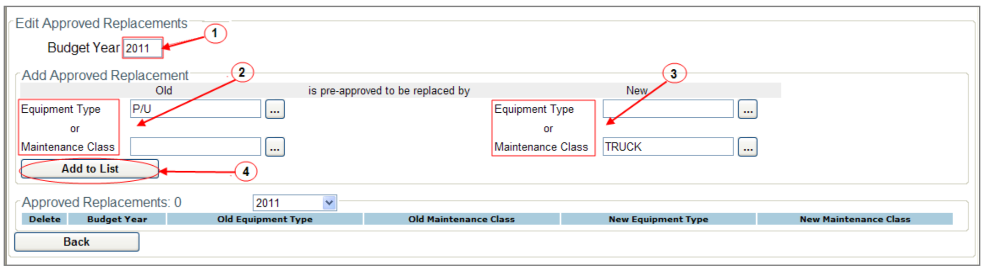
Configure this section according to the following instructions:

- **Require justification event on fleet additions:** Check this box to require justification on fleet additions.
- **Require justification event when [replacement budget amt]/[replaced budget amt]>=X:** Fill in the value for X where X = _____. (Example: for 115% budget tolerance, X=1.15.)
- ***Justification Event Type:** Click the search button and select the Event ID. **Note:** Event type is required when justification is required.
- **Manage exceptions** (pre-approved replacements): Click the **Approved Replacements** button to edit the Edit Approved Replacements List. You are taken to the Edit Approved Replacements page as outlined in the following section.

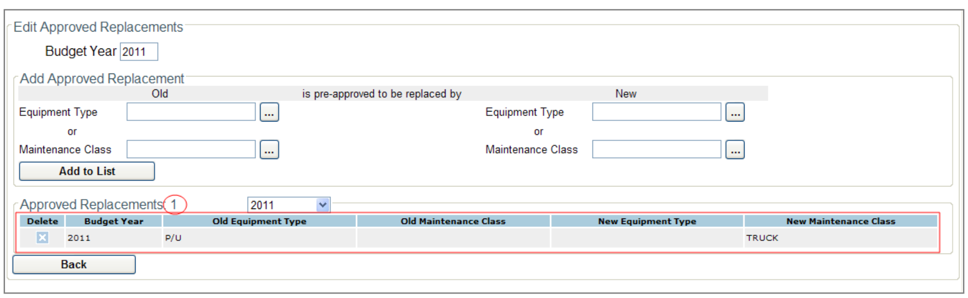
Edit Approved Replacements Page

Administrative users have the option of defining, in advance, the approved replacement classes for each year. To do this, follow the steps below.

1. Enter a Budget Year.
2. Choose the (*old*) Equipment Type or Maintenance Class to be replaced.
3. Choose the pre-approved replacement (*new*) Equipment Type or Maintenance Class.
4. Click the **Add to List** button.

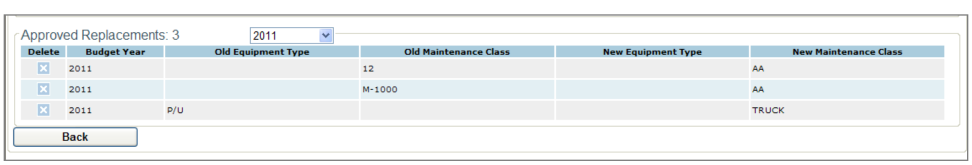


The Approved Replacement is added to the list.

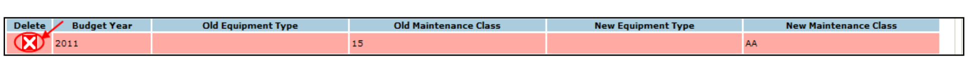


5. Continue to add to the Approved Replacements list by repeating **Steps 2-4** as desired. You may optionally include the same Equipment Type and Maintenance Class as pre-approved replacements.

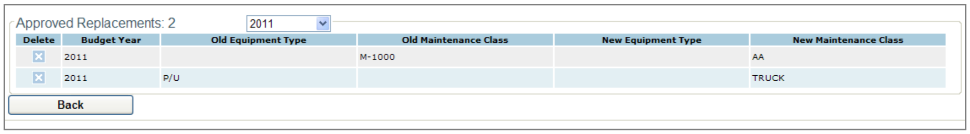
   Note: Projects can be created regardless of whether the replacement is approved. However, unapproved replacement projects require the system-defined justification event, described above, before they can be approved.



6. Click the **X** button to delete an approved replacement from the list.



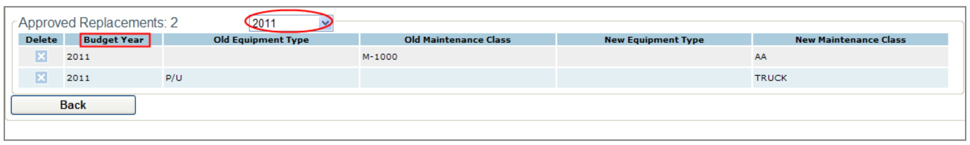
The replacement no longer displays.



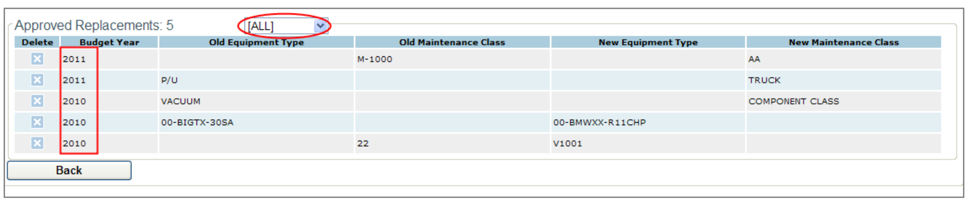
7. Click the **Back** button to return to the Equipment Planning Settings Page.

Pre-Approved Replacement List Information

Users are able to view existing approved replacement data. The view is based on budget year, or [ALL], and can be selected via the as shown in the screenshots below. Additionally, the count of Approved Replacements will be shown after each selection.



Select a year to filter on that budget year's approved replacements



Select ALL to show all years' approved replacements

The pre-approved replacement list can be pre-populated via a batch load process. See the Batch Load section below for more information about batch loading data.

Reports Section

Replacement Candidates Report: provides a default Replacement Candidates Report. Enter the default or custom report location for the Replacement Candidates Report. Click the **Restore Defaults** button to restore to the default Replacement Candidates Report.

Batch Load

See the *Batch Processing User Guide* for details on loading data into the system.

6. Finishing

After you have configured Equipment Planning, be sure to exit your browser and open a new browser window prior to using the Equipment Planning tab to enter acquisition requests, approvals, and denials.