

Version 25



Equipment Portal

Administrator Guide

Trade Secret | February 2025

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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 Web Modules Equipment Portal is an easy to use, browser-based interface that allows users to add new Fleet Equipment units.

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. Install/Upgrade the Equipment Portal

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

- ✔ When upgrading the Equipment Portal, if you previously customized the .aspx file, the new .aspx file will overwrite the existing one. Please contact Customer Service for assistance in saving your changes prior to upgrading the Equipment Portal.

3. Add an Equipment Portal Tab to Web Modules

To make the functions of the Equipment Portal available to Web Modules users, add a tab to your Web Modules installation for the Equipment Portal definition.

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.

4. Configuring the Equipment Portal

The Equipment Portal interfaces with the GUI's Fleet Equipment screen.

The Equipment Portal facilitates adding new fleet equipment units by allowing users to enter only a few fields when adding new Fleet Equipment as shown in the screenshot below.

Similar to the GUI, certain fields are required when adding new fleet equipment units through the Equipment Portal. However, not all the required fields are visible to the user. The Administrator configures the Equipment Portal by setting defaults for the required fields (that are not going to be entered by the user) on the Set Defaults for New Equipment screen. Follow the steps below to configure the Equipment Portal.

1. While logged into Web Modules as Administrator, click on the tab for the Equipment Portal.

The Main Equipment Portal Page displays.

- Click the pencil icon to go to the Set Defaults for New Equipment page.

The Set Defaults for New Equipment page displays.

- Complete the fields as desired.



Make sure to set defaults for all required fields that will be hidden from users when adding new equipment.

- Click the **Save Defaults** button to save your entries.

The Equipment Portal Main page displays.



The Equipment Portal is now configured.

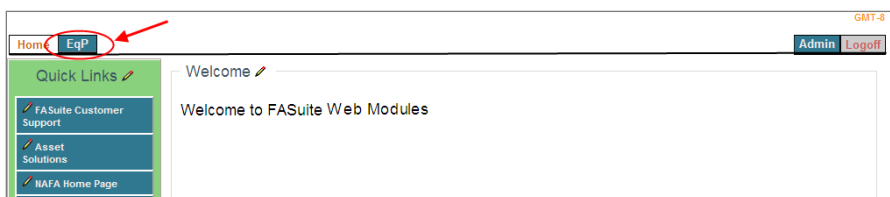
5. Finishing

After you have configured the Equipment Portal, be sure to exit your browser and open a new browser window prior to using the Equipment Portal tab to add fleet equipment units.

6. Adding Fleet Equipment Units

This section outlines how to use the Equipment Portal to add new Fleet Equipment units.

1. Click on the tab for Equipment Portal.



The Main Equipment Portal Page displays.



2. Click the **Add New Equipment Unit** button to add a new Fleet Equipment unit.



The Add Equipment Unit Page displays.

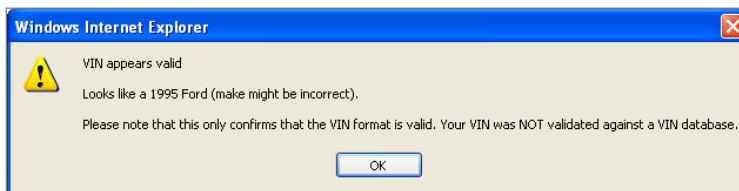


- ✓ You may tailor the look of this screen by selecting the fields to make visible to the user. Please contact Customer Support for assistance with customizing your Add Equipment Unit screen.

3. Enter the Serial number and click the Check VIN button to validate the Vehicle Identification Number.

 **Note:** Clicking the **Check VIN** button checks whether the VIN is 17 characters and has the correct check sum.

A dialog box displays information regarding the VIN (whether it appears valid or invalid).



4. Click **OK**.

You are returned to the Add Equipment Unit page.

5. Click **Add Equipment Record** to add the Fleet Equipment unit.

A message indicates successful equipment unit creation.