Version 25 | Trapeze Enterprise Asset Management

Mobile Portal

Administrator Guide

Trade Secret | February 2026

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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Contents

1. Overview

MobileFocus is a suite of software applications that allows integration of system applications with Mobile devices. The purpose of the products in the suite is to make the applications portable, enabling employees to access and update data related to work orders, asset meter readings, part transactions, etc., from where the work occurs rather than tied to a computer or kiosk.

This guide is specific to the Mobile portal. For MobileFocus PocketPC (PPC) and tablet compatibility and guides, please contact Customer Care with a request for your specific device and version.

The intended audience for this Administrator Guide is IT (Information Technology) and admin staff for setup and configuration

Requirements

- Application 25.x
- Web Modules 25.x
- Depending on the type of device being used for MobileFocus, once the Mobile portal is configured, see the requirements in specific documentation for your device:
    - Tablet Devices: Product Compatibility
    - PocketPC: MobileFocus PocketPC (PPC) Device Compatibility List

You will need the following items to install MobileFocus on your server and on your PocketPC or Mobile tablet device:

MobileFocus Server Components

- MobileFocus 25.x install/upgrade files.

  ⚠ The setup cannot run from files copied to a network share. MobileFocus must be installed on the local machine and not from a network.

- Ability to log in to the local machine as a user with Administrator rights.
- A system User ID having Administrator rights.

MobileFocus Client Components

- The MobileFocus 25.x install/upgrade files

  ⚠ The setup cannot run from files copied to a network share. MobileFocus must be installed on the local machine and not from a network.

- The server name or IP address of the MobileFocus server, port used for the HTTP protocol, and the installed Web Module application name (the web sharing alias defined during the base installation).
- A user ID having an associated employee ID in the system. Refer to Appendix B for associating employee IDs to user IDs.

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 (such as ‘, “, &, >, etc.) 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 portals in multiple browser windows or tabs. This can cause errors or unexpected performance issues.

2. Install/Upgrade Instructions

Installing MobileFocus Server Components

If you have not installed the base system, please follow the instructions in the *Administrator Guide* to install a new instance. The necessary MobileFocus server components will be installed at that time. If you have already installed it, no further action is required.

Upgrading MobileFocus Server Components

If you already have a previous version of MobileFocus installed, and have not yet upgraded your instance, please follow the instructions in the *Administrator Guide* to upgrade your instance. The necessary MobileFocus server components will be upgraded at that time. If you have already upgraded it, no further action is required.

3. Mobile System Settings

The Mobile module provides the ability to establish certain settings centrally via a Web Modules setup screen. These settings are then used by all mobile devices to determine program access rights and workflow rules.

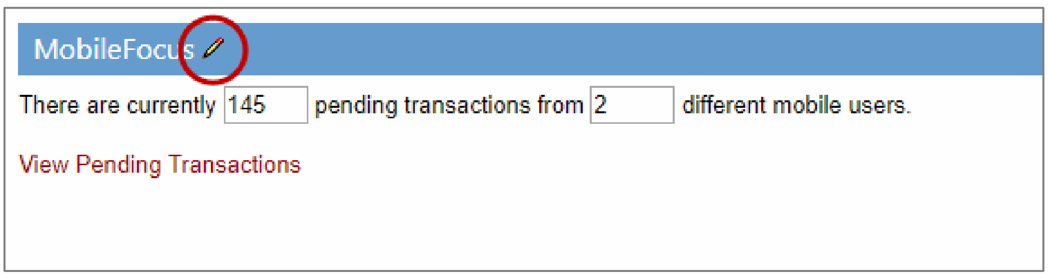
Note: All settings listed as **Mobile only** are version, type, and application specific.

To access and edit settings:

1. To view and update Mobile system settings, log into your Web Modules portal and open the Mobile module.

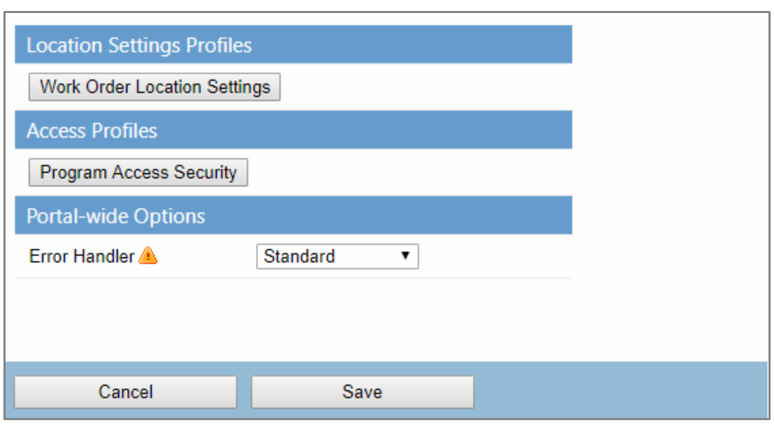
   Note: Your tab may be named something other than simply **Mobile**.

   *If your user ID is configured to allow system settings access (on the User Groups screen's Special Rights tab, the **System Administrator Rights** checkbox must be checked), then the Edit pencil will appear next to the tab's module name as shown in the screenshot below:*

2. To access the MobileFocus Settings screen, click the Edit pencil.

   The MobileFocus Settings screen displays.

The MobileFocus Settings screen currently supports three functions:

- **Work Order Location Settings:** Allows customization of certain application rules, such as number of months of maintenance history to download and labor tracking method;
- **Program Access Security:** Allows you to control which MobileFocus sub-applications (such as Work Orders, Parts Issues, Fuel Tickets, etc.) should be available to which user groups.
- **Portal-wide Options:** Allows you to set the portal-wide setting to use the new standard error handler, or the standard error handler for mobile error transactions.

Location Settings Profiles

These settings allow the System Administrator to customize certain settings regarding how the application should function. These centrally-managed settings are distributed to EAM Mobile clients when the clients perform a **Download Users** command.

Access Profiles

This page allows you to control which user groups may access which MobileFocus sub-applications. When a user logs into the MobileFocus client, only those sub-applications that the user has access to appear on the Welcome screen.

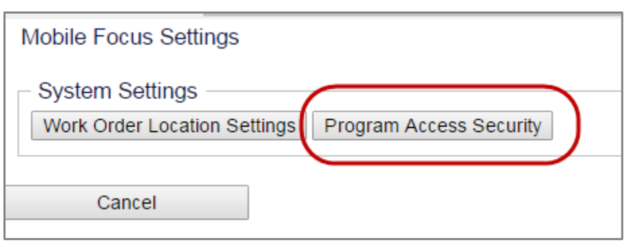
Note: The applications that display on the Program Access Security page vary according to the setting on the Error Handler setting in the Portal-wide Options section. Applications will only display if they are available in the chosen mode (Standard vs Classic).

The following applications are available for access security:

- Asset Management
- Assignment Verification
- Condition Inspection
- Crew Management
- Direct Issues
- External Fuel Tickets
- Fuel Tickets
- Inventory County
- Label Printing
- Linear Work
- Meter Readings
- Parts Inventory
- Parts Issues
- Pick lists
- Put-away Cards
- Regulatory Inspections
- Service Requests
- Test Results
- Time Clock
- Work Orders

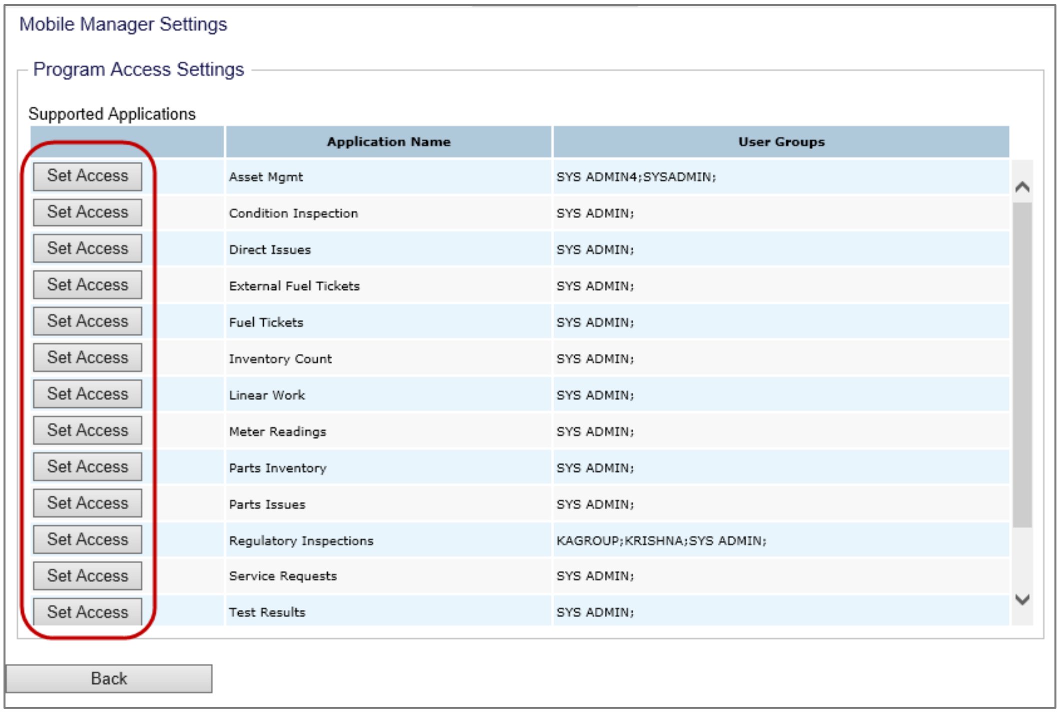
To change the access settings:

1. From the MobileFocus Settings page, click **Program Access Security**.

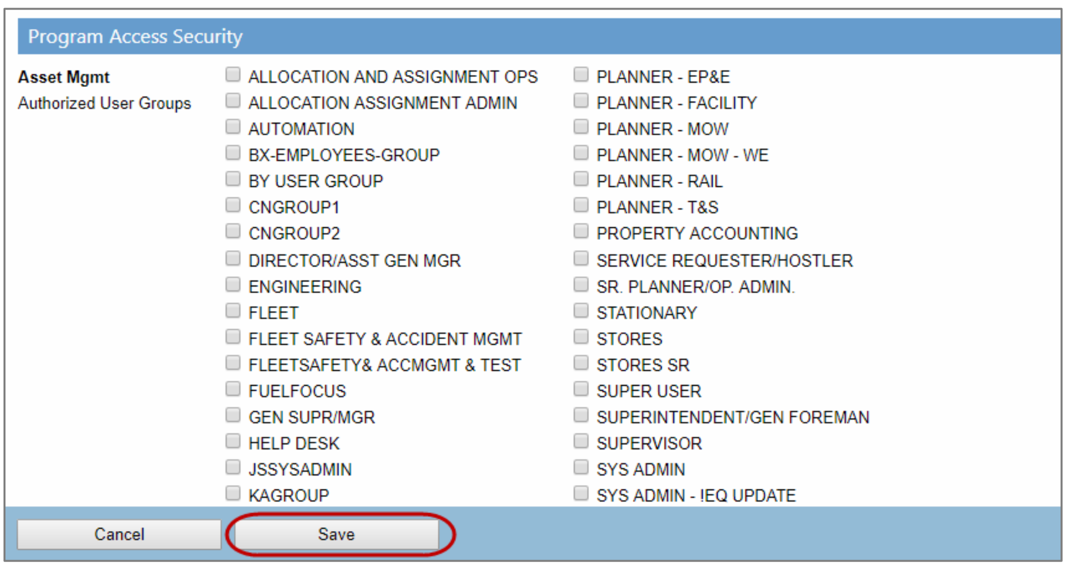


2. To alter the user groups who may access a MobileFocus sub-application, click **Set Access** next to that application's name:

   Note: If an application does not show in this list, be sure to use the **Update InfoCenter** button on the Admin Center, Installation Manager page. For more information, refer to the Administrator Guide. Also, applications will only show if you have access to that module, and the correct product to run the application (for example, MobileFocus for tablets).



3. On the Mobile Manager Settings screen, check all user groups who need access to the application and click **Save**.



Remember that updated Program Access Settings are not transferred to the MobileFocus devices until each client performs the download users command.

You are returned to the Program Access Settings page where the updated user groups display.

Layout Settings

Card Layout Settings – Clicking this button takes you to the Card Layout Summary where you can view existing Card Layouts. Clicking a name takes you to the Card Layout Detail where you can edit the existing layout.

Clicking **New Mobile Card Layout** takes you to the Card Layout Detail page where you can configure a new mobile card.

Card Layout Detail

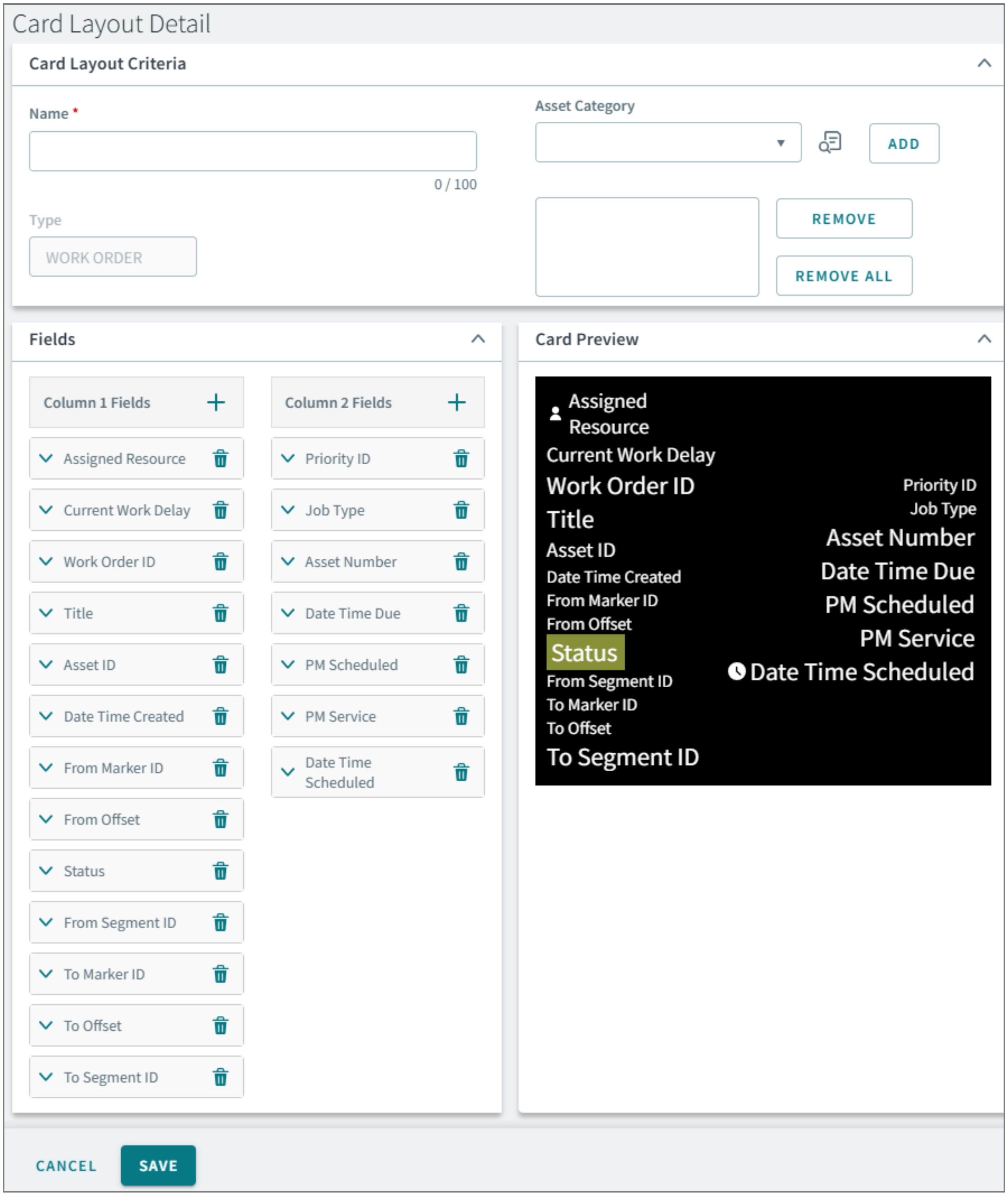
Layout settings for a mobile card, such as a work order list item, can be edited on the Card Layout Detail. At the top of the page, the Mobile Card Type is shown. The "Work Order" mobile card type allows editing of the layout of a work order item in a work order list. In the future, other mobile card types may be supported and selected here.

A Layout Name can be selected to identify the Layout. An Asset Category can be selected to choose which assets a Mobile Card Layout will apply.

In the Fields section, various fields can be selected and configured. If a field is irrelevant to an Asset Category, it can still be added, but it will not display on the card. Fields can be added to either Column 1 or Column 2 and dragged within or between columns.

A Text Size input allows users to switch between L1 (largest), L2, or L3 (smallest) sizes.

A Mobile Card Preview area approximates the Mobile Item's appearance on EAM Mobile



Portal-wide Options

Error Handler: Choose between using the standard or classic error handler. Refer to the Handling Centralized Errors section for more information and workflow processes. The choice of error handler also changes which applications display on the Program Access Security as that page only displays applications available to either Classic or Standard MobileFocus.

- **Classic Error Handler:** The classic Error Handler page works will the previous mobile platforms with the Windows store application (WSA), PocketPC (PPC), and Regulatory Inspections.
- **Standard Error Handler:** The standard Error Handler page works with the cross platform mobile solution and REST API.

Set up Map Services

To use mapping on mobile devices, you must set up mapping, and have a mapping provider available with a proxy.

For more information and processes for setting up mapping services, refer to the *Mapping Administrator and User Guide*.

4. Handling Centralized Errors

All mobile device errors that are ignored by the end user are sent to a centralized error handling web page. When the error cannot be remedied by the user directly on the device, the user should ignore the error so that an administrator can fix the error via the Web Modules MobileFocus Error Handler webpage.

Standard Error Handler

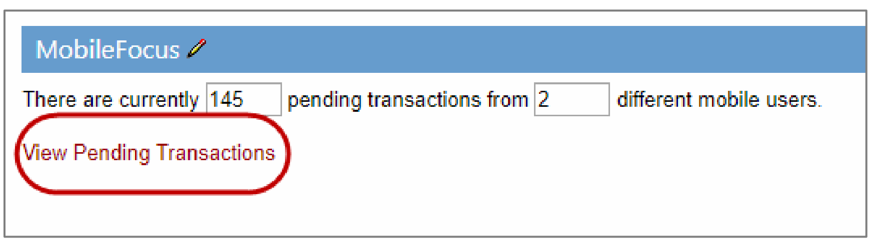
To handle centralized errors in Web Modules:

1. Log in to the Web Modules.
2. Click on the **Mobile** tab.

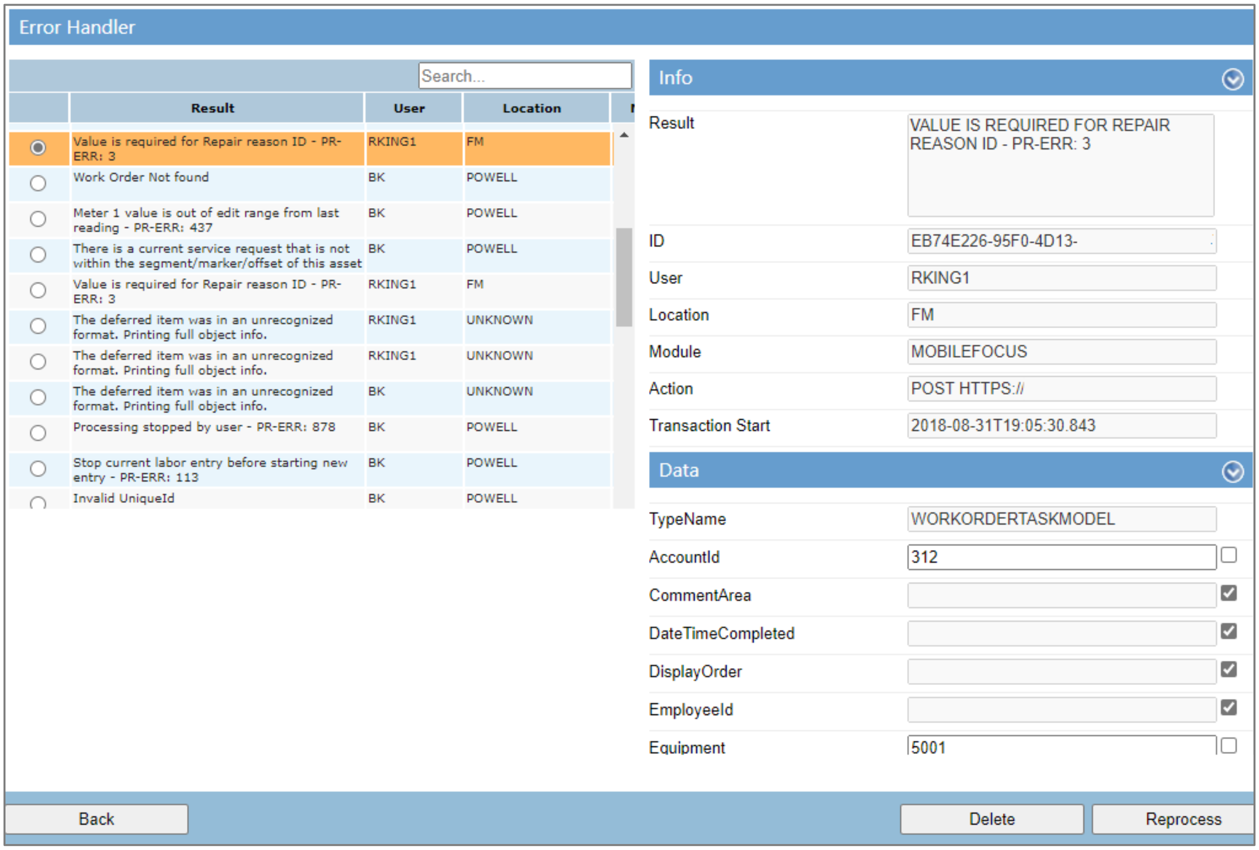
   The main Mobile portal page displays the current number of pending transactions for your default location.

   If you do not have a **Mobile** tab, please see the *Administrator Guide* for assistance in creating a tab.

3. Click the **View Pending Transactions** link.



The Pending Mobile Transactions screen appears.

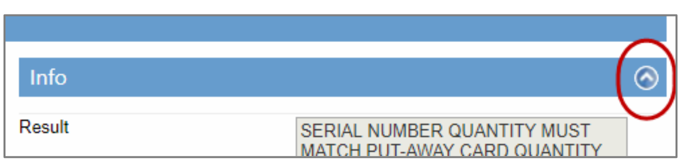


Viewing Errors on the Error Handler

The standard error handler allows you to view or hide information as needed to make your page adaptable to your needs.

Search: Use the search field to narrow the error list. The search field is a responsive list and will narrow the error list as you enter characters. This search searches all column items for the errors.

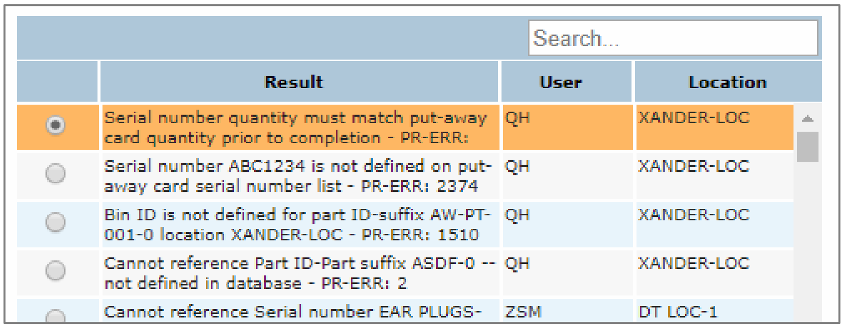
Hiding sections: Use the blue arrow icons on the Info and Data sections to show or hide that section.



Correcting the Error

To correct an error:

1. Select an error in the error table.



Search...

	Result	User	Location
◉	Serial number quantity must match put-away card quantity prior to completion - PR-ERR:	QH	XANDER-LOC
○	Serial number ABC1234 is not defined on put-away card serial number list - PR-ERR: 2374	QH	XANDER-LOC
○	Bin ID is not defined for part ID-suffix AW-PT-001-0 location XANDER-LOC - PR-ERR: 1510	QH	XANDER-LOC
○	Cannot reference Part ID-Part suffix ASDF-0 -- not defined in database - PR-ERR: 2	QH	XANDER-LOC
○	Cannot reference Serial number EAR PLUGS-	ZSM	DT LOC-1

2. Enter the correct data into the appropriate fields for the current transaction.

    - Greyed out fields are not editable.
    - The checkbox on the right side of the editable fields indicates if the value will be saved when reprocessing the transaction. When checked, the related field will be disabled, and its value will not be saved when reprocessing the transaction. This is useful if it is decided that a field value should not be saved, but you would still like the transaction to be processed.

3. Click **Reprocess**.

    The error reprocesses.

    If the correction is successful, the error list will refresh with one less error and the next error's data will be available to correct.

Deleting the Error

If an error does not need to be corrected, click **Delete**.

The error is deleted from the list.

All transactions having errors deleted at this step are lost and cannot be reprocessed. Before you delete an error from this list, make sure that either the transaction was truly in error, or has otherwise been manually corrected in the system.

*The message **No Pending Transactions** will appear when all pending transaction errors have been corrected.*

Classic Error Handler

To handle centralized errors in Web Modules:

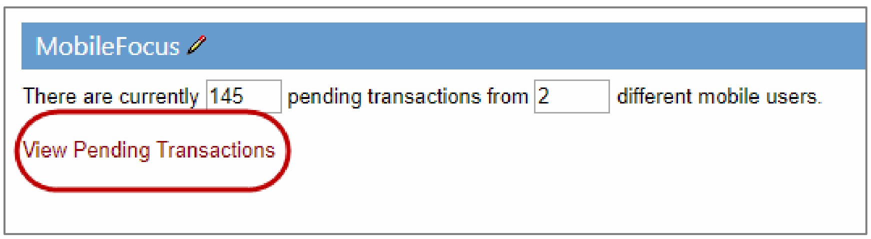
1. Log in to Web Modules.

2. Click on the **Mobile** tab.

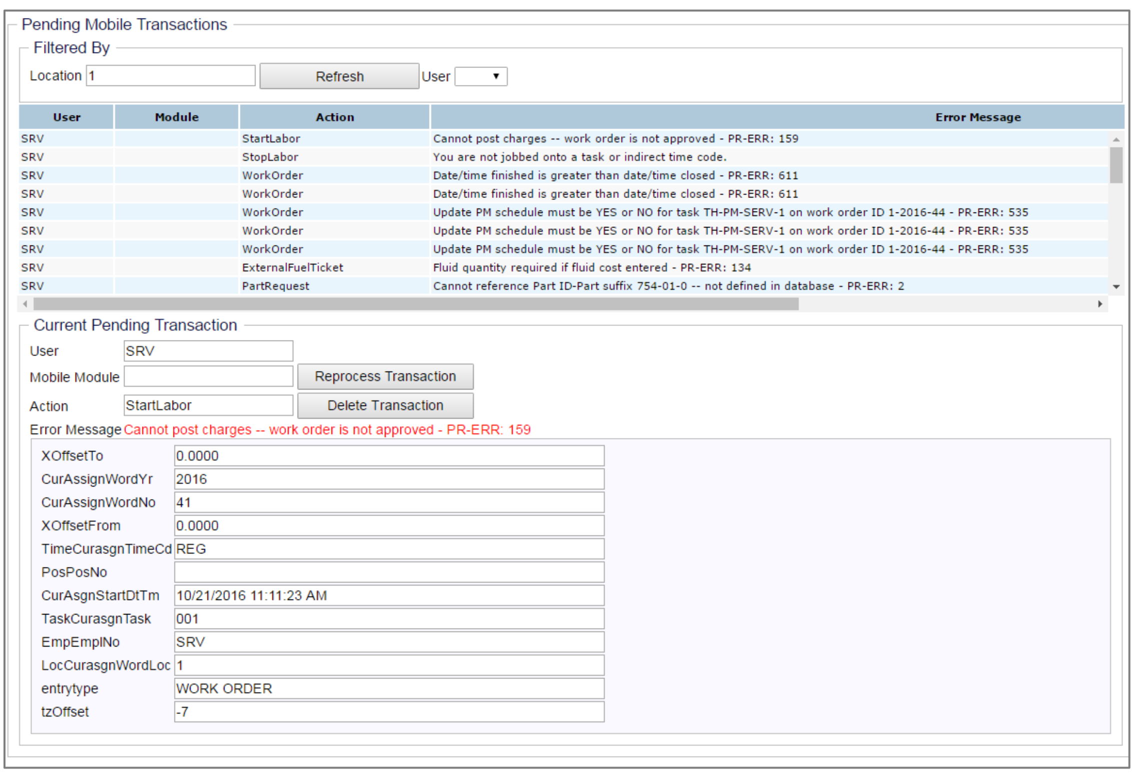
   The main Mobile portal page displays the current number of pending transactions for your default location.

   If you do not have a **Mobile** tab, please see the *Administrator Guide* for assistance in creating a tab.

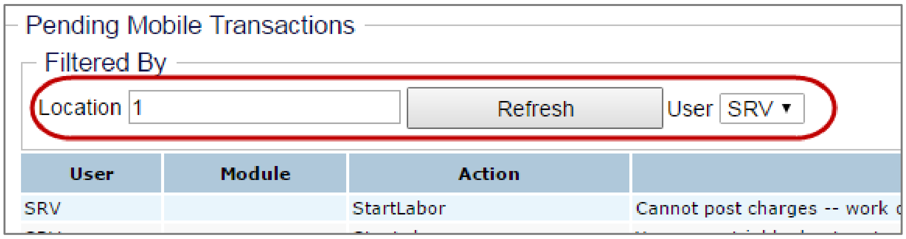
3. Click the **View Pending Transactions** link.



   The Pending Mobile Transactions screen appears.



4. If needed, type in a **Location** if the location displayed is different than your default location, and click **Refresh**.
5. Select the desired **User** from the drop-down list to limit the transactions list.



6. From here, you may choose to either correct or delete the error as described in the next section.

Correcting the Error

To correct the error:

1. If the current error displaying needs to be corrected, in the Current Pending Transaction area enter the correct data into the appropriate fields for the current transaction.
2. Click **Reprocess Transaction**.

   The transaction reprocesses.

   If the correction is successful, the error list will refresh with one less error and the next error's data will be available to correct.

Deleting the Error

If the error does not need to be corrected, click the **Delete Transaction** button.

The error is deleted from the list.

All transactions having errors deleted at this step are lost and cannot be reprocessed. Before you delete an error from this list, make sure that either the transaction was truly in error, or has otherwise been manually corrected in the system.

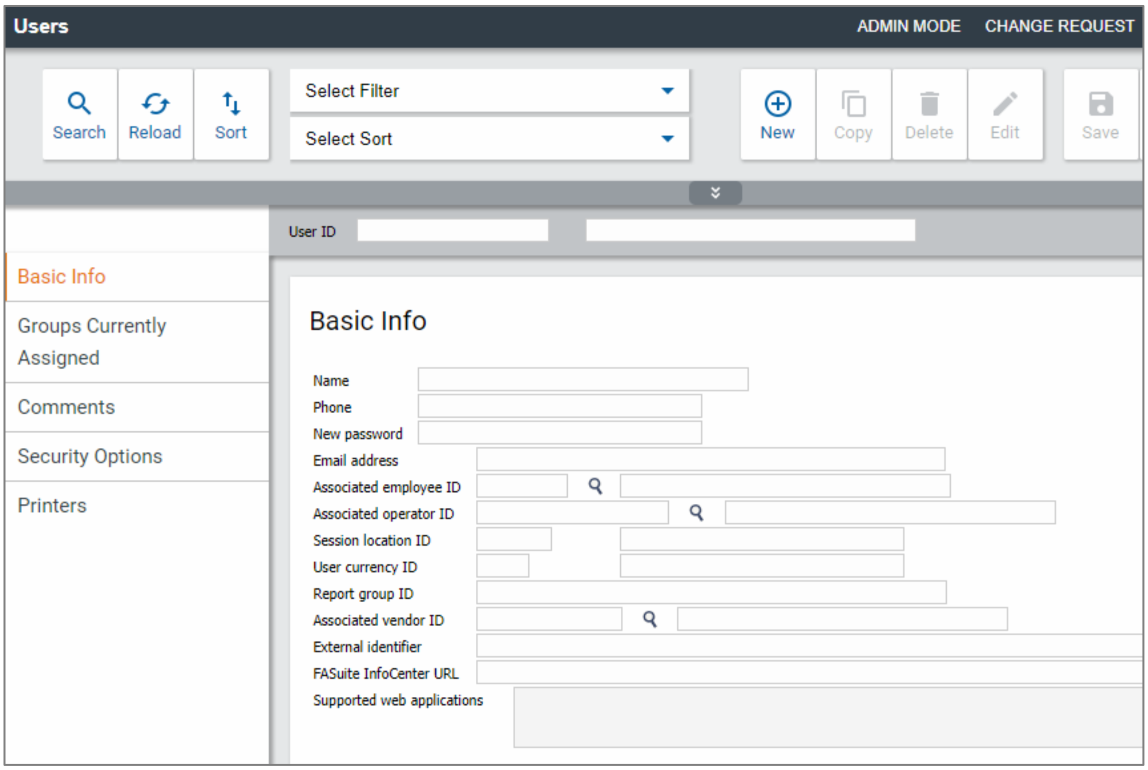
*The message **No Pending Transactions** will appear when all pending transaction errors have been corrected.*

Appendix A. Associating an Employee ID to a User ID

For MobileFocus to recognize your user ID, you must have previously associated your employee ID and user ID in the system (the MobileFocus user download process only downloads user IDs related to active employee IDs). The following steps outline how to create an associated employee ID and link your employee and user identifications.

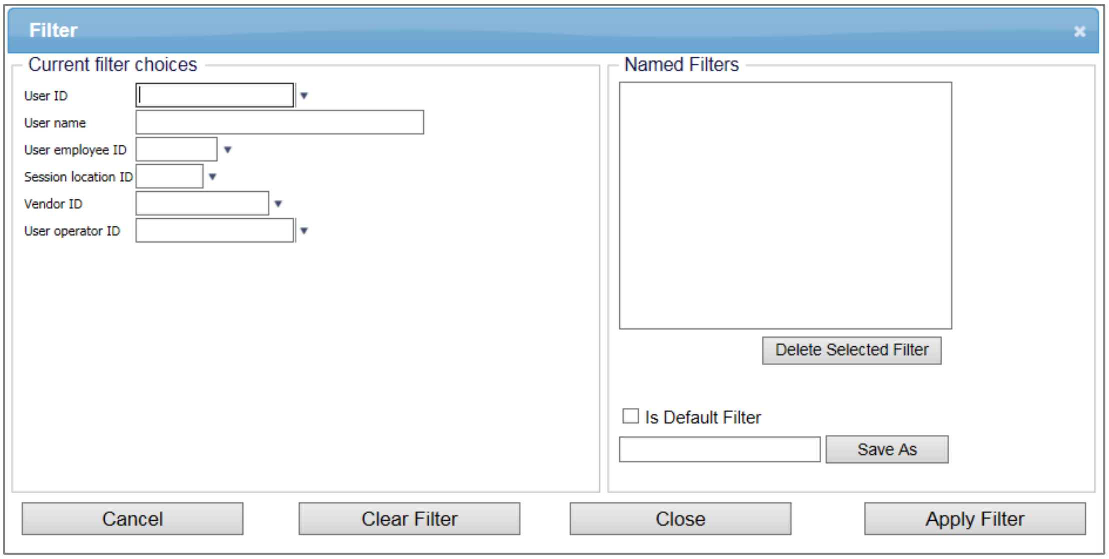
To create and link your employee and user ID:

1. Open the Users screen.



2. Click **Search**.

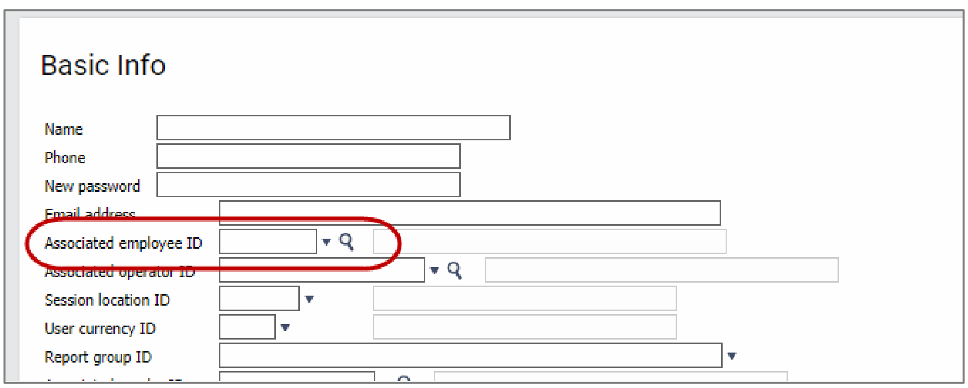
   This opens the Filter pop-in.



3. Click the **User ID** drop-down and select your ID.
4. Click **Apply Filter**.

   The data associated with your user ID is displayed in the Users screen.

5. Click **Edit**.
6. Choose an **Associated employee ID** from the drop-down list.



If you do not have an employee ID, you must first create it on the Employees - Primary Information screen.

7. Click **Save**.

   ***Successful update** displays at the bottom-left corner of the screen and your **Associated employee ID** will appear in the grid below the **User employee ID**.*

   After re-downloading users on your device, you can now login to MobileFocus using your user ID and password.