

Version 25



Trapeze

Enterprise Asset Management

Module Customization and General Information

Reference Guide

Trade Secret | August 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.

Module Customization and General Information Guide

Version 25.x

August 2025

Contents

1. Table Settings and Customization	1
General Features	1
Column Sorting	1
Advanced Customization	1
Admin Options	2
Hide/Show Columns	2
Resize Columns	4
Rearrange Columns	4
2. Location Settings Profiles	5
Work Order Settings	7
Types of Scheduling to display in Calendar	14
Labor Tracking Settings	14
Timesheet Settings	15
Asset Settings	15
Visualization Settings	16
Feature Service Settings	16
Customer Scheduling Options	16
Finishing the Location Settings	17
3. Custom Gadget Layout	18
Personalizing Gadget-Based Portals	18
Personalizing Your Layout	18
Layout Options	18
Edit the Layout	21
Add or Edit a Gadget	21
Single-Instance Gadgets	21
Multiple-Instance Gadgets	22
Standard Gadgets	22
Add a Gadget	30
Edit a Gadget Title	30
Reorder Columns and Gadget Layout	31
Delete a Gadget	31
Add or Edit a Gadget Group	32
Add a Gadget Group	32

Resize Column Width	33
Reorder Gadget Groups	33
Delete a Gadget Group.....	34
4. Assets	35
General Asset Information	35
Asset Chooser	35
Asset Chooser Filters	36
View and Select an Asset	40
Location Security Rights in Asset Chooser	44
Filters in Asset Chooser	45
Asset Viewer	45
General Information	46
Basic Information	47
Codes.....	48
Scheduled Services	49
Warranty	49
Attributes	49
Additional Data.....	51
Bill of Materials.....	51
Parts Used	52
Related Links/Files.....	52
Comments/Notes	53
Relationships	53
Map	56
5. Access Control Security	57
Location and Department Access Control Limitations.....	57
Location-level Access Control	57
Department-level Access Control	59

1. Table Settings and Customization

General Features

Tables throughout the system are designed to display results and information in a simple and clear manner. The following information highlights the basic features of all tables.

Column Sorting

Columns can be sorted by clicking on the header of the column by which you would like to sort the table. An arrow appears in that box indicating that the information is being sorted by that column and the direction in which it is being sorted. Click the header again to reverse the direction of the sorting.

Task Code	Description	WAC	Repair Reason	Priority	Work Class	Est Hours
CNT	CN REPAIR GROUP		J	1		0.00
001	ELECTRICAL SYSTEM		J	1		4.00
TH	REPAIR GROUP		J	1		6.00

Advanced Customization

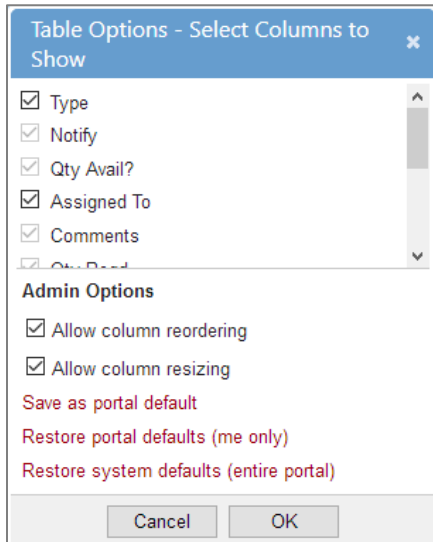
Certain tables throughout the system allow features such as hiding/showing columns, changing column order, filtering, sorting, column-resizing, and saving the layout and sort order automatically to each user's profile. The following information describes the functionality of the advanced features.



Not all tables have the following advanced capabilities. Tables will automatically display the features if they have the capability.

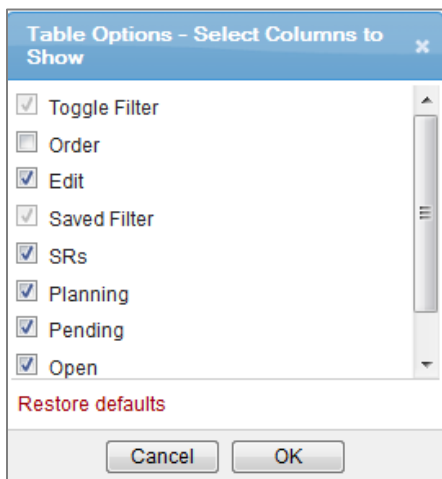
Admin Options

Administrators can configure tables in the Web portals on a per-table basis to allow users to reorder or resize columns. Check the **Allow column reordering** or **Allow column resizing** to enable or disable this feature for users. Both of these options are enabled by default.



Hide/Show Columns

Columns can be hidden or shown based on your organization's preferences. To select which columns to display, right click on any column header. The Table Options pop-in will launch allowing you to check or uncheck the columns.



Some column options will appear greyed-out indicating that they cannot be un-checked. These columns represent critical data needed to display on the table.

❗ Never hide all columns as the table will not display and there will be no way to access the table options menu to restore it.

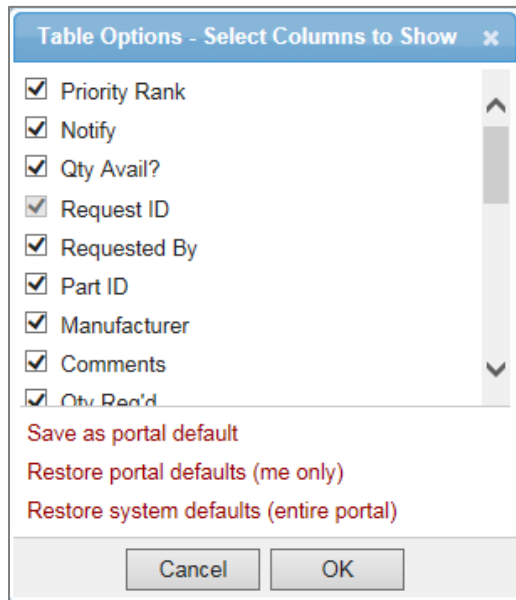
Click **OK** when you have checked the columns you would like displayed in the table.

Restore defaults

Click the **Restore defaults** option to reset all settings to the default for that portal.

Administrator View for Table Options

If you are logged in as an Administrator, your Table Options screen will display with the following additional choices.



Save as portal default

The **Save as portal default** option allows you to set the selected options as the default table setting for the portal. This setting applies the options for your currently selected portal tab and can be set separately for each instance of a portal tab.



User-groups can be accommodated by setting-up a new tab specific to a user group and then setting defaults for that group.

Restore portal defaults (me only)

This option allows you to reset all settings to the defaults for that portal. The change only impacts your instance, allowing you to have different settings than the default or to revert in case you have made changes you do not wish to keep. This change effects the resizing and rearranging of the columns, as well as the selected columns you have chosen to display.

Restore system defaults (entire portal)

If you have Administrator rights, the **Restore system defaults (entire portal)** option is displayed and allows you to reset all settings to the system defaults for the entire portal.

Resize Columns

Columns can be resized by placing the cursor on the white divider line between the columns.

Request ID	Requested By	Part ID	Qty Req'd	Qty on Hand	Qty on Order
------------	--------------	---------	-----------	-------------	--------------

A resizing cursor icon  will appear indicating you can move the columns. Hold the left mouse button down and drag the column to the size you would like it to display. The entire column will adjust to the size of the header when the button is released.

Rearrange Columns

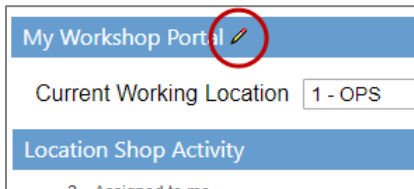
Rearranging the columns allows you to display the most important information for your user group first or arrange the information according to your organization's workflow. In order to rearrange a column, click and hold the left mouse button on the column header and drag it to the location where you would like it to display. The entire column will shift when the button is released.

2. Location Settings Profiles

Use the Location Profiles to create settings profiles for various locations. Location Profiles are available for setup in the Work Management, Supervisor, Technician, and Production Manager Shop Activity web portals, along with the MobileFocus, Asset, and Customer Access web portals.

To access the Location Profiles page:

1. From the portal you are working in, click the edit pencil.



The main settings page displays (the settings available for each portal will differ).

2. Do one of the following to open the Location Profiles page:

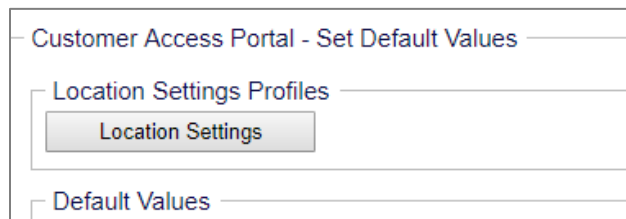
For the Shop Activity and Mobile portals:

- Click **Work Order Locations Settings**.



For the Customer Access portal:

- Click **Location Settings**



For the Asset portal:

- Click **Location Profiles**.

Module Settings

Portal-wide Options

Date/Time Values in 24 hour or 12 hour format: 24 Hour ▼

Shop Activity Tab to Use for Creating Work Orders ⚠: Work Management ▼

Capital Project Tab to Use for Creating Capital Projects: Capital Project Portal ▼

Equipment / Part Lookup Search String: Eq ID - License # - Asset # - VIN

New Asset Wizard Options

Default DATA PREP lifecycle code for new assets ⚠: DP - REVIEW AND FINALIZE ASSE

Default TEMPLATE lifecycle code for template assets ⚠: TM - TEMPLATE FOR CREATING A

Buttons: Cancel, Save, Location Profiles (circled in red)

To add a new or edit a Location Settings Profile:

1. From the Location Profiles page, click **New Location Profile** to create a settings profile for a location, or click **Edit** on an existing profile to edit that profile's settings.

 The **Search** field narrows the list to only display Profile Names or Locations that contain the search characters entered.

Location Profiles

Search:

		Profile Name	Location(s)
Edit		Default Settings	
Edit	Delete	AB-LOC-000	AB-LOC-000
Edit	Delete	ACA	ACA
Edit	Delete	Assign WOs	RA
Edit	Delete	AUTO-RPR	AUTO-RPR
Edit	Delete	CNLOCS	CNLOC1, CNLOC2, CNLOC3
Edit	Delete	cntestfiles	CNTEST1, CNTEST2, CNTEST3

Buttons: Back, New Location Profile

The Work Order Location Setting Detail Edit page displays.

2. Complete your entries and selections by entering a profile name, locations and setting the appropriate options as needed.

For more information on individual settings, refer to the settings sections below.

Work Order Settings

Complete your entries and selections by entering a profile name, locations, desired work order settings, labor tracking settings, timesheet settings, and customer scheduling options.

Require Service Requests for Tasks

This setting allows you to require tasks to be assigned to service requests. The following examples provide more information. This setting defaults to **No**.

- When this setting is set to **YES**, on the Work Order Main page, the tasks button is hidden for non-service request tasks, and the button to start a task will be hidden on the Technician portal.
- When this setting is set to **No**, the Service Request drop-down menu on the Receipt and Line Item page can be left blank, since a service request is not required.

Do Not Default Date and Time in

When this setting is enabled, when a user creates or opens a pending work order, the date and time value is left blank on the work order center screen instead of assigning a time. This option is default to know, which will set the date and time for this action instead.

Show details of fully reversed postings

This checkbox allows you to enable the display of postings that have been fully reversed. When this option is enabled, the details of fully reversed postings, including postings with 0 labor or cost, will display on the Work Order Postings page. This option specifically applies to Labor and Commercial postings. When these postings are displayed, the edit pencil does not display with them since users can only edit postings that are not 0 or not fully reversed. This option is disabled by default.

Allow edit of SR 3C information when posting labor, parts, and commercial work

This checkbox allows you to enable technicians to edit 3C information when posting labor, parts, or commercial work. This setting is off by default. When enabled, it will allow technicians/supervisors on a per location basis to directly edit 3Cs information for tasks that have an associated service request.

Minimize showing Service Request information by default

This setting allows more control around displaying service request information. If enabled, it will minimize most information shown in work order posting dialogs by default.

Redirect technician to portal home upon finishing work order

Enabling this setting forces technicians back to the portal home page upon successfully finishing a work order.

Allow supervisors to job on technicians

Check this option to enable supervisors to job on technicians for real-time labor. If this setting is enabled, supervisors will be able to see the **Start** button on the Work Order Main page next to individual tasks. When a supervisor starts a new task, a button called **Select Employees** is available on the action toolbar. This opens the Employee select dialogue to choose which employee or crew to start on the task. This option is disabled by default.

Allow technicians to make assignments on WO

Check this option to allow technicians to access assignments through the Work Order Main and Postings pages without switching to the Supervisor portal. This option is disabled by default.

Show multi-asset work order comments, files and notes on child work orders

When enabled, this setting will give additional context to technicians for work orders created or associated to a top-level multi-asset work order. This option is disabled by default.

Months of work history to download (Mobile only)

Set the number of months of work history to display. This option only applies to MobileFocus.

WO Completion method allowed (Mobile only)

Allow the completion methods of FINISH, CLOSE, or allow BOTH of these options.

Allow reopen of finished/closed WO (Mobile only)

If this is set to **Yes**, users will be able to reopen closed or finished work orders on their mobile device. If this is set to **No**, the reopen buttons are hidden from users. On the work order summary, this option will also hide the close button if this setting is set to **No**.

Prompt user for WAC when jobbing off work order (Mobile only)

When enabled, this setting will prompt the user for a Work Accomplished Code in the mobile application when they job-off of a work order. This option is disabled by default.

Default Part Action for Location

The **Default Part Action for Location** setting under the **Work Order Settings** for a given location is the setting that controls the default parts action on the Post Work Order Parts pop-in. The default parts action is set to REQUEST or ISSUE based on the following rules:

- If this setting is set to LABOR METHOD, or the setting is not set (due to an upgrade), the default part action is determined by the location's labor method. By default, the location labor method is considered REALTIME.
 - If the location labor method is POST, then the default action is set to ISSUE.
 - If there are any other methods set, then the default action is set to REQUEST.
 - If this setting is set to POST or ISSUE, this sets the default action to POST or ISSUE, respectively.
-  **Note:** If the user does not have rights to an action, then the action is set to the other action, regardless of what the default part action is set to. If the user does not have rights to any action, they will be unable to perform either POST or ISSUE.

For example:

- If a user does not have the right to POST, then the action will be set to ISSUE.
- If a user does not have the right to ISSUE, then the action will be set to POST.

It is recommended that you do not hide or disable the Issue and Request buttons via user interface (UI) rights. Use portal settings instead.

Allow positional information on Part Actions when not required

If enabled, the position fields will be available for use when issuing or requesting parts for a work order.

Allow serialization information on Part Actions when not required

If enabled, the serial number fields will be available for use when issuing or requesting parts for a work order.

Allow adding files to requests

Allow adding notes to requests

Prompt for delay code when last technician jobs off work order

When enabled, this setting adds a prompt that reminds technicians to input a delay code when the last technician jobs-off of a work order. This option has three radio-buttons: NONE, WARNING, REQUIRED.

- If set to NONE, the delay prompt will not display on the Task Detail page.

- If set to **WARNING**, a message is displayed on the Task page indicating that they are the last technician on the open work order and if they stop the task without a delay entered, labor will be stopped.
- If set to **REQUIRED**, a message is displayed on the Task page indicating that they are the last technician on the open work order and requires them to enter a delay code.

Allow users at this Location to issues NFI (not from inventory) parts

This setting allows users of these locations to issue NFI (not from inventory) parts. This setting is the highest level of control. To determine if NFI parts may be issued, check the location setting. The rules are as follows:

- If the location setting allows issue, then check the user group.
- If the user group does not allow, then do not allow.
- If both allow, then it is allowed.
- If the location does not allow, then do not allow.

Allow selection of multiple PM services when opening a PM work order

Check this box to enable you to set a number of sub options including the following:

- The number of days from today to project
- whether to Exclude services on open work orders (to find the PMs that are overdue or due today, set the Number of days from today to project = 0)
- whether to Include services soon due by meter
- Fine-grained filters for reason due that give precise control over what services show when creating a work order: Date, Meter or Fuel override, Meter 1 projected override, Meter 2 projected override, Meter due, and Fuel projected override

 Be careful when using this setting because it will affect system performance. Only use the setting if you want to allow adding PM services when creating work orders.

Allow selection of multiple PM services when opening a PM work order ☒	
Number of days from today to project 66	Only show reason due by ☒ Date
Exclude services on open work orders ☒	☒ Meter or fuel override
Include services soon due by meter ☒	☒ Meter 1 projected override
	☒ Meter 2 projected override
	☒ Meter due
	☒ Fuel projected override

- With the setting selected, the New Work Order page for a PM work order will calculate the PMs due for the asset. When multiple items are due, the main service (e.g., the service that is soonest due) is added to the Basic Info tab and the remaining items are listed as additional tasks on the work order. To select or deselect an item, check or uncheck the box in the Add to Work Order column as shown below

New Work Order 1000-2011-27

Job Type PM
Location 1000 - FULL SERVICE SHOP

Equipment ID C-1003
2010 CHVRL CAVALIER, METERS: 1-4543, 2-0

Messages ☐

WORK ORDER NUMBER	EST	TYPE	STATUS	REASON	PM SERVICE
1000-2010-15	PM	OPEN		B1	
1000-2010-26	REPAIR	OPEN		A	
1000-2010-27	REPAIR	OPEN		A	
1000-2010-28	PM	OPEN		B1	
1000-2010-126	REPAIR	OPEN		A	
1000-2010-137	PM	OPEN		B1	
2000-2010-4	REPAIR	OPEN		A	
2000-2010-9	REPAIR	OPEN		A	

Meter1 4543 Meter1 Validation

Repair reason ID

Work Class

Services and Inspections Due: 1

Add to Work Order	Service / Inspection due	Reason	Date due	Days late	Meter 1 until due	Meter 2 until due
☒	B1 - PM-B1	DATE	02/28/2010	978	457	0

Service Status

Date and Time In 11/02/2012 12:04 PM

Date and Time Due 11/04/2012 12:04 PM

Vendor

The Work Order Main page below shows the newly created work order with the added PM Service.

Work Order Main

Asset ID C-1003: C-1003-CHEVCAVALIER03 2010 CHVRL CAVALIER NAVY BLUE CHEV. CAVALIER
4 DOOR SEDAN

Asset Number CHEV-CAVALIER03 Station Location License Number 65241X12

Work Order ID 1000-2011-27 Job Status OPEN

Job Type PM Technician

Unit In 11/02/2012 12:04 PM Due 11/04/2012 12:04 PM

Repair Location 1000 - FULL SERVICE SHOP Service Status

Meter 1 4543 (EQ UPD)

Tasks: 1

Task ID	Task Description	WAC
B1	PM-B1	

New Task

Service Requests / Defects: 1

Code	Description
Symptom: H-2 - NO LIGHTS	
Task: 19-004 - TIMER - ELECTRIC	

Notes: No notes.

Actions

Main Page	Start Delay	View/Edit Detail
Finish Work Order	Part Actions	
Equipment History	Test Results	Related Files
Messages	Print Work Order	Component Warranty
Commercial Work	Postings	

Enable Workflow for creation of a Service Request from a PM Checklist (Mobile Only)

Check this checkbox to allow mobile users to have the option of creating a service request from a PM checklist.

Capture GPS Coordinates on Work Finish (Mobile only): Check this box to enable MobileFocus to capture the coordinates of the user when the user finishes work.

Technician checklist item access requiring authorized skilltype – Unrestricted Access, Update Only, View and Update: This setting restricts how technicians are able to view and edit PM Checklist items for which their Employee does not support the skill type.

Allow users to bulk edit pm checklists: This checkbox is enabled by default. If unchecked, the bulk edit action will be hidden.

Enable checkbox signoff on PM Checklists for supervisors: This setting allows supervisors to use the “Done” column on PM Checklists that is normally available only to technician. It allows for 1-click signoff for the supervisors, rather than having to type out or search for an Employee ID.

Default Work Accomplished Code (WAC) for PM Tasks (Mobile only): Use this setting when generating a Service Request from a PM Checklist in MobileFocus. This is not a required setting and only affects MobileFocus.

Allow modification of completed checklist items by signoff employee (Mobile only): If enabled, allows modification of completed PM checklist items in Mobile.

Adding comment to checklist item marks the item as done (Mobile only): If enabled, marks the item as done if comment is added to PM checklist item in Mobile.

Default Work Accomplished Code (WAC) for failed PM tasks: Use the chooser button to the right of this option to select a default WAC code to be applied to failed PM tasks.

- **Require a failed PM checklist item when using default failed PM Task WAC:** When this setting is checked, work orders that have a PM checklist with a failed work accomplished code (WAC) must have at least one failed item on their PM checklist, or the work order cannot be finished with that WAC. This adds validations to ensure the proper WAC codes are being assigned based on failures of PM tasks.

Continue editing Service Request after initial entry: Enable this checkbox to stay on the Service Request Detail page after saving a service request. If this option is disabled (which is the default setting), after saving a service request, the user is taken back to the main portal page.

Show multi-asset work order on calendar unscheduled work list: This setting allows you to directly assign and schedule a multi-asset work order from the Shop Calendar. By enabling this setting, you are indicating you wish to manage multi-asset work order assignments rather than their individual children on the shop calendar. Multi-asset work orders awaiting to be scheduled will then be shown in the unscheduled list and any unscheduled child work orders will no longer be shown in the work order list.



Note: If you manually schedule a child work order using the assignment detail page or Work Assignment Enterprise Portal screen, it will then show on the calendar as its own standalone entry.

Hide New Service Request section when creating Work Orders: Checking this setting will hide the New Service Request section for users when they are creating new work orders for that location. This setting is disabled by default, so this section does display by default.

Do not default Work Order title on creation from Service Request: If this setting is enabled, the Work Order Create workflow will not automatically fill in the title based on service request data. This setting is disabled by default.

Hide 3C Summary Section on Work Order Postings: Check this option to hide the 3C summary section on work order postings. This setting is disabled by default.

Show Assignment Contacts on Work Order Postings: Check this option to display the assignment contacts on the work order postings. This option is disabled by default.

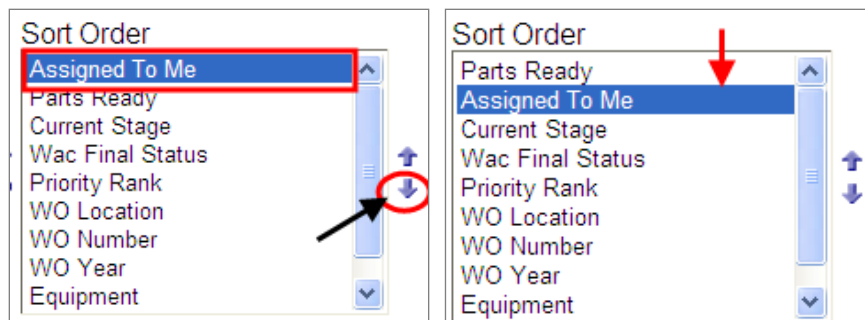
Allow Technician to override Next PM Due Date: Enable this option to allow technicians to override the next PM due date. To enable Technicians to override the PM due date, the option called **Override next PM due date** on the Locations – Primary Information screen, Work Orders – Options tab must be enabled.

Allow entry of number of times a task will be completed: Enable this option to specify the number of times that a task will be completed on a work order. This field is used in Standards Calculations to determine the average time it takes to perform that task.

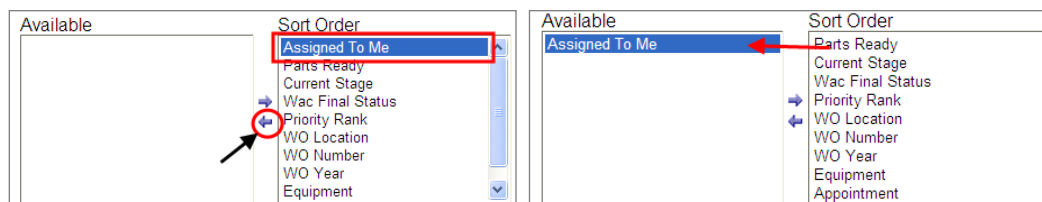
Allow entry of 3C summary data (Mobile only): Check this field to allow users to enter 3C data while in the field. This option is disabled by default.

Select the Hot Sheet sort order: This area allows you to determine the sort order for the Hot Sheet. Select an item in the Sort Order list and click the up and down arrows to move the item up/down in the order. Click the left arrow to remove the item from the sort and place it in the Available list. Select an item in the Available list and click the right arrow to move it to the Sort list.

Example: Moving items up/down in the Sort Order:



Example: Removing items from the Sort Order to the Available List:



SI Certification Report: Enabling this setting allows you to run the Certification report from the Work Order Main and Work Order Postings pages.

Types of Scheduling to display in Calendar

Use the checkboxes in this section to allow **Assignments**, **Appointments**, or **Non-work activity** scheduling items to display in the calendar.

Labor Tracking Settings

Time Management dialog options (Mobile Only): Checking this box will check the following options. This provides control over access to certain Time Management functions in MobileFocus.

- **Use Indirect Time Management:** Controls access to the Indirect Time Management dialog in MobileFocus.
- **Use clock in/out (Mobile Only):** Allows you to set mobile devices to use or not use clock in or clock out.

When the **Labor entry method (Portals only)** is set to **POST** or **BOTH**, three new options appear that you can choose:

- **Use Legacy Indirect Labor Entry Method:** This option forces supervisors to use the legacy workflow where only postings were possible, and this option hides the **Timecode** field on the Indirect Task page.
- **Time entry method (START/END or DATE/HOURS)**
- **Allow Labor entry on New Job dialog** (default is checked)
- **Allow Service Request Selection on New Job dialog** (default is unchecked)

The **Allow Labor entry on New Job dialog** and **Allow Service Request Selection on New Job dialog** settings control what is seen on the New Job dialog.

- When the settings are CHECKED, the ability to select and create Service Requests and add Labor Postings display on the New Job dialog.

The screenshot shows the 'New Job' dialog box. The 'Existing SRs' section is highlighted with a red box, and a red arrow points to it with the text 'Allow Service Request Selection on New Job dialog setting = CHECKED'. The 'Add Labor Posting - Line 1' section is also highlighted with a red box, and a red arrow points to it with the text 'Allow Labor Entry on New Job dialog setting = CHECKED'. The 'Add Labor Posting' section includes fields for Technician, Task ID, WAC, Start, End, Hours, From Marker, To Marker, Time Code, Account ID, Repair Reason, and Comments. There are also 'Undo' and 'Add' buttons. Below this is a 'Pending Labor Postings' table with columns for Line, Task ID, Start, End, Technician, WAC, and Hours. At the bottom are 'Cancel' and 'Save' buttons.

- If the settings are unchecked, the New Job dialog only displays the service request information as shown in the screenshots below.

The screenshot shows the 'New Job' dialog box with the following fields: Complaint (Symptom), Cause, WAC, Correction, and Task ID. There are 'Cancel' and 'Save' buttons at the bottom.

Timesheet Settings

Allow technicians to edit their timesheet: This setting allows technicians to edit their timesheet.

Asset Settings

Default Life Cycle Status Code for new assets (Mobile only): This setting allows you to set a default status for new assets being created in the mobile application.

Allow update of Equipment Status on an asset (Mobile only): Enable this option to allow the Equipment Status to be updated for an asset in the mobile application.

Supported Asset Types: Check the boxes in the supported column to ensure those asset types are supported for the location.

Visualization Settings

Technicians see assigned work on a map: Check this box to allow technicians to see assets and assigned work, including work orders and service requests, on a map on the My Work tab. Refer to the *Shop Activity Technician User Guide* for more information.

Display map of assets in list on Services and Inspections Due page: Check this box to display maps on the Service and Inspections Due page. This option defaults to unchecked, which does not display maps on this page.

Shop map in Work Planning Project Timeline page: Check this option to display a map in the Work Planning Project page. This option is disabled by default.

Display calendar on Services and Inspections Due page: Checking this setting turns on the calendar for the Services and Inspections Due page. This option is default to be unchecked to not display the calendar on this page.

Display calendar in Asset Viewer Services Due section: Check this option to enable a map to display in the Asset Viewer Services Due section. The default of this option is unchecked to hide this map.

Feature Service Settings

The **Supported Feature Services** section allows you to use feature services, such as weather overlays, on maps. Feature services are defined and set up on the Map Services Enterprise Portal screen. To define which service layers are visible on a location's map, check the **Supported** boxes for each layer you want to display for that location.



For more information about mapping, refer to the *Mapping Administrator and User Guide*.

Customer Scheduling Options

Check either the **Specific time** or **Pre-determined drop off times** options to choose specific increments of time (hour or half hour) or pre-determined times for users to request appointments.

You may also set default values for the following options: **Default minimum estimated hours for a task**, the **Average number of techs per day**, **Allow scheduling based on % capacity per day**, and **Allow appointment requests for as soon as X days from now**.

Include PM assignments in remaining capacity calculation: Check this box to enable PM assignments to be included in the remaining capacity calculation (used when determining whether a technician has room for additional assignments).

Finishing the Location Settings

1. Click **Save** to save the profile.

You are returned to the Work Order Location Settings page with your newly created profile added to the list.

1. Click the profile's **Edit** and **Delete** buttons to edit or delete specific profiles.



Depending on your setting for 'Require Service Requests for Tasks,' the **Work Order Main** page will display differently. Likewise, the setting, 'Labor entry method,' will also cause screens to display differently. See the *Shop Activity Supervisor Portal User Guide* for more details about the page differences.

3. Custom Gadget Layout

The following information describes how users can set up and use portal gadgets. Images in this document will vary slightly with available gadgets depending on the portal you are customizing.

-  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.

Personalizing Gadget-Based Portals

Each individual user can customize their layout the portals they have access rights to. Customization is user-based for most portals. However, portals like Capital Plan have layout customized by location instead of by individual user. Customization also affects all devices used to access Web Modules (such as computer vs. tablet). After customizing layout, you may want to access the specific portals from your other devices to ensure they display correctly.

Personalizing Your Layout

When a portal is a gadget-based portal, you can configure the layout of the main page. The front page is highly customizable through the Edit Layout pop-in where you can select from available gadgets and organize them into sections with up to three columns.

-  **Note:** Be aware when configuring the front page as gadgets with large amount of information may use significant resources, and multiple, large gadgets could slow response time.

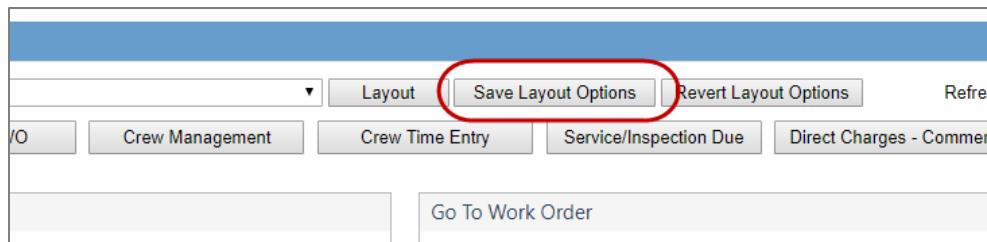
Layout Options

Default layouts can be saved for locations to allow administrators to set up general layouts for users, based on location-specific needs. Any changes to the default for a specific location will override the layouts for all users using default layouts for that location. Any user-defined layouts will take precedent over default layouts.

Save Layout Options

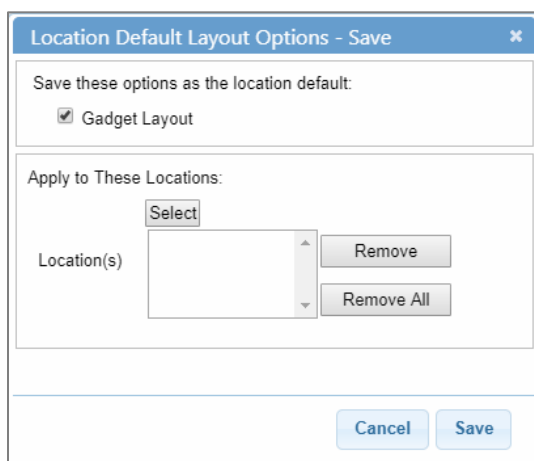
Use the **Save Layout Options** button to save the current layout for a location default.

-  **Note:** This button is only available to users that have administrative rights in the system (users who see the administrator edit pencil icon).

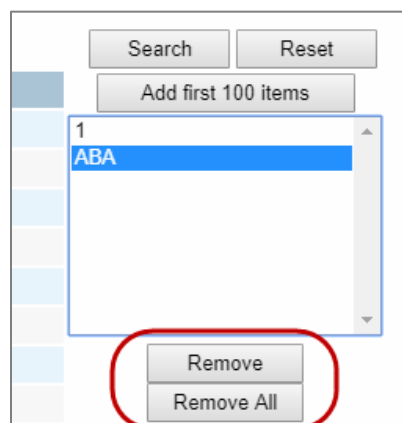


To save current layout options:

1. Click **Save Layout Options**.
2. The Location Default Layout Options – Save pop-in displays.



3. To add locations for this layout to apply:
 - i. Click Select to open the Locations pop-in.
 - ii. Choose the locations from the list as needed.
 - iii. To remove a location from the list, select the location in the right pane, and click **Remove**, or click **Remove All** to remove all added locations.



- iv. Click **Apply** to add the selected locations to the layout options pop-in.
4. Click **Save**.

Location Default Layout Options - Save

Save these options as the location default:

☒ Gadget Layout

Apply to These Locations:

Select

Location(s) 1 ABA Remove Remove All

Cancel Save

5. A confirmation message displays.

This will overwrite any location default layouts at the selected location(s). Do you wish to continue?

OK Cancel

6. Click **OK**.
7. The default layouts are set for the locations.

Revert Layout Options

This allows you to revert back to default layout options. Use the same process as laid out in the above section ([Save Layout Options](#)), except the defaults will be reverted for the selected locations.

Layout Save Layout Options Revert Layout Options Refresh

Crew Management Crew Time Entry Service/Inspection Due Direct Charges - Commercial

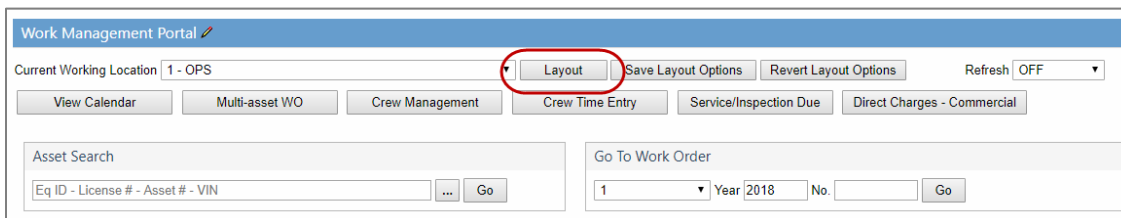
Go To Work Order

1 Year 2018 No. Go

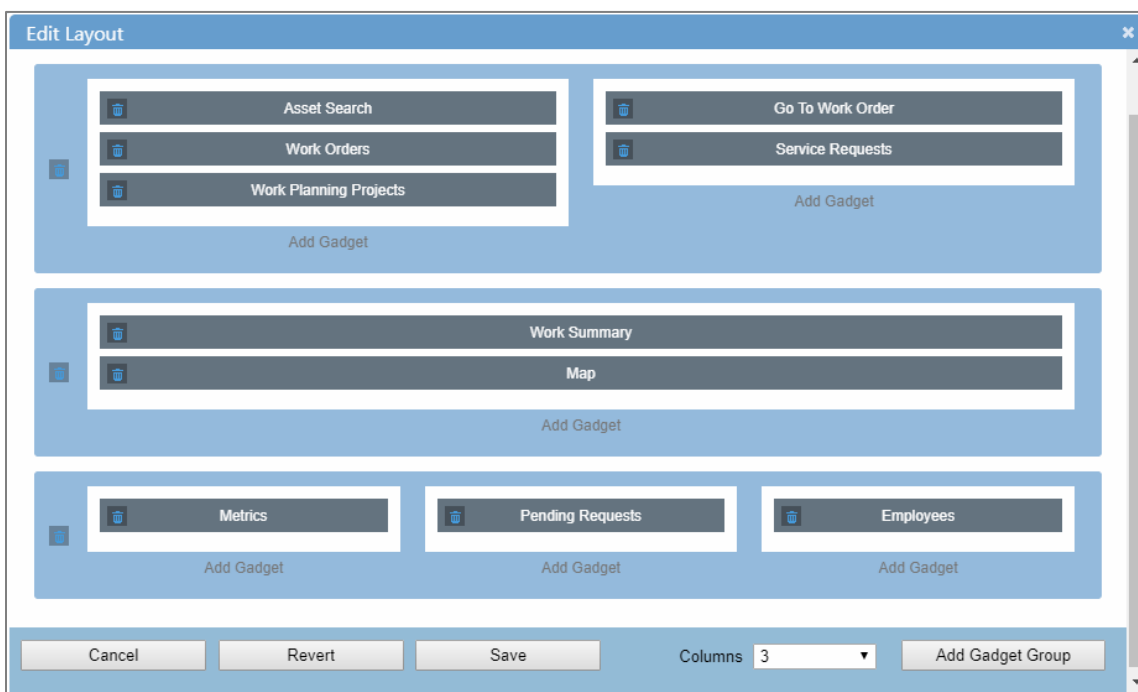
Edit the Layout

To edit your layout:

1. To edit the front page layout, click the **Layout** button on the front page of the portal.



The Edit Layout pop-in allows you to change the size of columns, organize gadgets and groups, and has buttons to let you add gadgets and gadget groups.



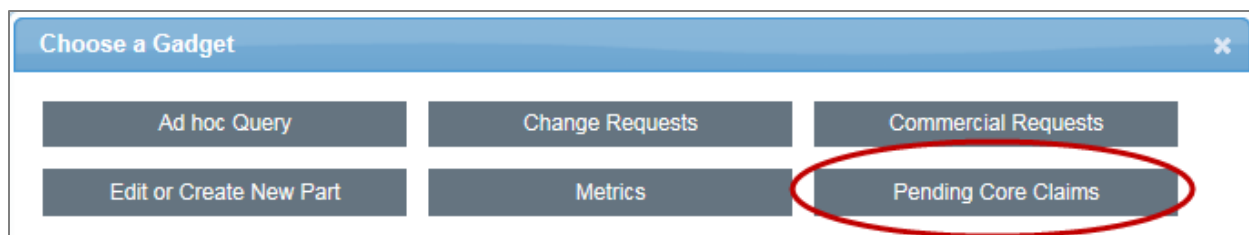
2. To continue editing your layout, follow the instructions in the sections below.

Add or Edit a Gadget

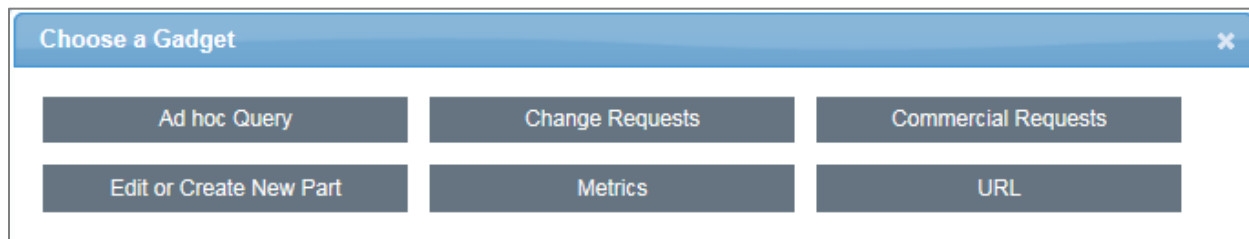
Single-Instance Gadgets

Some gadgets can only be used once in the portal page. These gadgets are single-instance gadgets. Single-instance gadgets will show in the Choose a Gadget screen until they are chosen. Once they are used on the page, they will disappear from the list of options, as shown below with the Pending Core Claims gadget.

Before Added to the Portal



After Added to the Portal



Multiple-Instance Gadgets

Some gadgets can be used multiple times in a portal. These gadgets are called multiple-instance gadgets, and will always show in the Add Gadget list, even if already used on the page.

Standard Gadgets

The gadgets listed and described here are standard for gadget-based portals such as Work Management and Storekeeper. If you do not see a gadget listed below and need additional information on portal-specific gadgets, these gadgets are described in their respective portal guides.

Ad hoc Query

Ad hoc Query  			
Search:			
Task ID	Description	Avg. Hours	Min
P	POLLUTION (EMISSION INSPECTION)	53.17	.02

The Ad hoc Query multiple-instance gadget provides flexibility by allowing almost any saved Ad hoc Query report (that the user has access to) to be embedded in the gadget. Search and sort functions are included, as well as the ability to launch the report in a separate window. Refer to the *Ad Hoc Query Administrator or User Guides* for information about using the Ad Hoc Query module.

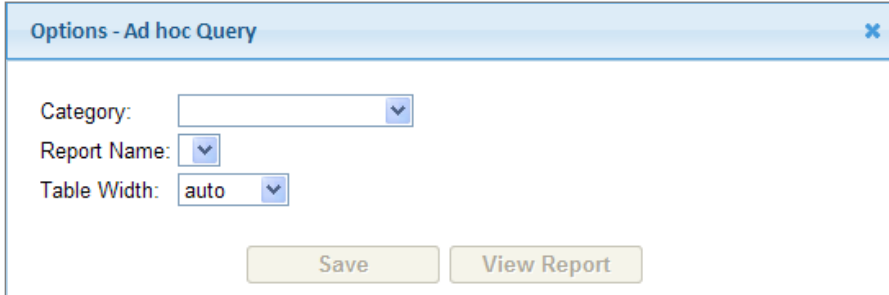
For the gadget to work properly, the query must return a single table.

To create an Ad hoc Query:

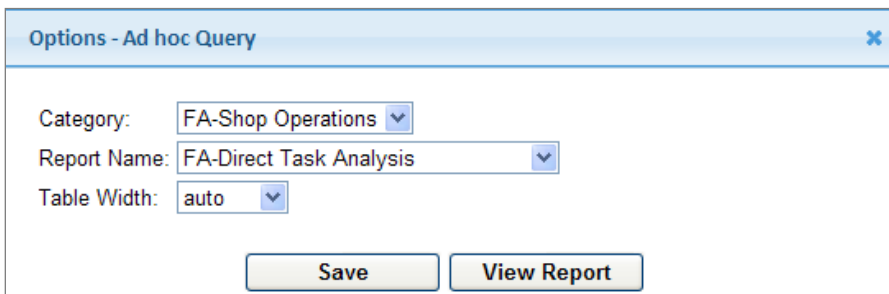
1. Click the **Edit Pencil** .



The Options- Ad hoc Query pop-in displays.



2. Select the **Category**, **Report Name** and **Table Width** from the drop-down selection boxes. There are three different table width settings for embedded data tables:
 - Auto (recommended/default) - Automatically spaces out columns based on approximately 140 pixels per column.
 - Fit (only recommended for tables where horizontal scrolling is not expected) - Attempts to fit the table to fill available space.
 - Custom (recommended only when Auto and Fit do not look good, e.g., in tables with very long column names or very large data values) - User specifies the table width and horizontal scrolling is automatically enabled if the table width exceeds the available area.



3. Click **Save** to save the query to the gadget on the portal page.

Options - Ad hoc Query [X]

Category: FA-Shop Operations [v]
 Report Name: FA-Direct Task Analysis [v]
 Table Width: auto [v]

Save **View Report**

The query shows on the front page.

Ad hoc Query [edit] [search]

Search: [text box]

Task ID	Description	Avg. Hours	Min.
P	POLLUTION (EMISSION INSPECTION)	53.17	.02

To view the report:

1. Click **View Report** (on the Options – Ad hoc Query pop-in)

Options - Ad hoc Query [X]

Category: FA-Shop Operations [v]
 Report Name: FA-Direct Task Analysis [v]
 Table Width: auto [v]

Save **View Report**

2. Click the **Zoom** [search icon] button.

Ad hoc Query [edit] [search]

Search: [text box]

Task ID	Description	Avg. Hours	Min.
P	POLLUTION (EMISSION INSPECTION)	53.17	.02

The report displays in the Ad hoc Query Viewer.

FA-Shop Operations > FA-Direct Task Analysis

Print | Results 1000 | Design

Hide Filters | Add Field | Delete Field | Update Results

Filter Field	Operator	Value(s)	Blank
LaborHours	Is Greater Than	0	☐
IndirectLabor	Equals	N	☐
Date	In Time Period	Current Year	☐
...	...		☐

Task Analysis

Task Analysis for tasks with
hours posted > 0
LaborHours > 0
IndirectLabor = N
Date In Time Period Current Year

Average Hours Summary

Average(Labor Hours)	
Task ID	53.17

Task ID	Description	Avg. Hours	Min. Hours	Max. Hours	Tasks Count
P	POLLUTION (EMISSION INSPECTION)	53.17	.02	118.73	3

The reports can be saved in a category or uncategorized.

 The Ad Hoc Query gadget is limited to 1000 rows maximum. If the query results exceed this limit, it is indicated at the bottom of the gadget with instructions for how to get full report.

 To see all rows, click the **Zoom** button or the **View Report** button (using pagination) in the Ad Hoc Query viewer as indicated in the screenshots below.

Ad hoc Query

Search:

Department ID	Department Name	EQ #	
1000	MOTORPOOL DEPARTMENT	101H	2007 SILVERAC
1000	MOTORPOOL DEPARTMENT	C-1000	CHEV. CAVALIE
1000	MOTORPOOL DEPARTMENT	C-1002	CHEV. CAVALIE
1000	MOTORPOOL DEPARTMENT	C-1003	CHEV. CAVALIE
1000	MOTORPOOL DEPARTMENT	C-1004	CHEV. CAVALIE
1000	MOTORPOOL DEPARTMENT	C-1005	CHEV. CAVALIE
1000	MOTORPOOL DEPARTMENT	A-1000	CHEV. MALIBU
1000	MOTORPOOL DEPARTMENT	A-1002	CHEV. MALIBU
1000	MOTORPOOL DEPARTMENT	A-1003	CHEV. MALIBU

Showing 1 to 1,000 of 1,000 entries Data may be truncated. Zoom for full report.

Options - Ad hoc Query

Category: FA-Shop Operations

Report Name: FA-Direct Task Analysis

Table Width: auto

Save View Report

The report displays in the Ad hoc Query Viewer.

EQ #	Description	Model Year	Manufacturer ID	Model ID	VIN	Life Total Meter	License #	Life Cycle Status Code ID	PH Loc	Repair Loc	Operat
10-01	2007 SILVERADO 1500 4x4 CREW CAB	2007	CHVRL	1500 CREW CAB	2GCEK133271664150	20,146	569676	A	EG	EG	0280
C-1000	CHEV. CAVALIER 4 DOOR SEDAN	2010	CHVRL	CAVALIER	C-1000-CHEVCAVALIER01	3,212	65241X23	A	1000	1000	
C-1002	CHEV. CAVALIER 4 DOOR SEDAN	2010	CHVRL	CAVALIER	C-1002-CHEVCAVALIER02	2,353	65241X43	A	1000	1000	
C-1003	CHEV. CAVALIER 4 DOOR SEDAN	2010	CHVRL	CAVALIER	C-1003-CHEVCAVALIER03	4,543	65241X12	A	1000	1000	
C-1004	CHEV. CAVALIER 4 DOOR SEDAN	2010	CHVRL	CAVALIER	C-1004-CHEVCAVALIER04	3,215	65241X72	A	1000	1000	
C-1005	CHEV. CAVALIER 4 DOOR SEDAN	2010	CHVRL	CAVALIER	C-1005-CHEVCAVALIER05	1,000	65241X91	A	1000	1000	
A-1000	CHEV. MALIBU 4 DOOR SEDAN	2010	CHVRL	MALIBU	A-1000-CHEVMALIBU01	35,000	54241X23	A	1000	1000	
A-1002	CHEV. MALIBU 4 DOOR SEDAN	2010	CHVRL	MALIBU	A-1002-CHEVMALIBU02	3,000	54241X25	A	1000	1000	

Metrics

Metrics	
Open WOs	4998
Add	

The Metrics gadget displays user-defined metrics consisting of a single data value (similar to a Dashboard gauge but with only a label and a value). This gadget uses the same data sources supported by Dashboard module gauges: saved Ad hoc Query reports (with category KPI only), and advanced Key Performance Indicators (KPIs), including ad hoc SQL statements (requires Dashboard module administrator access).

The Metrics gadget supports the variables in the following table.

Keyword	Keyword Code	Description
User's Location ID	{FAVAR_UsersSessionLoc}	The logged-in user's Session Location ID, as defined on the Users screen.
User's Employee ID	{FAVAR_UsersEmployeeID}	The logged-in user's Associated Employee ID, as defined on the Users screen.
User's Operator ID	{FAVAR_UsersOperatorID}	The logged-in user's Associated Operator ID, as defined on the Users screen.
User's Vendor ID	{FAVAR_UsersVendorID}	The logged-in user's Associated Vendor ID, as defined on the Users screen.
User's Operator's Department	{FAVAR_UsersOperatorsDept}	The Department ID of the logged-in user's Associated Operator ID.
Now	{FAVAR_Now}	Current datetime (at the time the dashboard is viewed)

Keyword	Keyword Code	Description
Today	{FAVAR_TodayStart}	Today's date, with a time of midnight.
This Week Start	{FAVAR_WeekStart}	The date of the previous Sunday, at midnight.
This Month Start	{FAVAR_MonthStart}	The date of the first of the current month, at midnight.
This Quarter Start	{FAVAR_QuarterStart}	The date of the first of the current quarter, at midnight.
This Year Start	{FAVAR_YearStart}	January 1st of the current year, at midnight.
Shop Activity Supervisor Portal Current Working Location	{WEBVAR_CurrentLoc}	The current working location as specified in the Supervisor Portal.
Shop Activity Storekeeper Portal Current Working Location	{WEBVAR_CurrentPartsLoc}	The current working location as specified in the Storekeeper Portal.

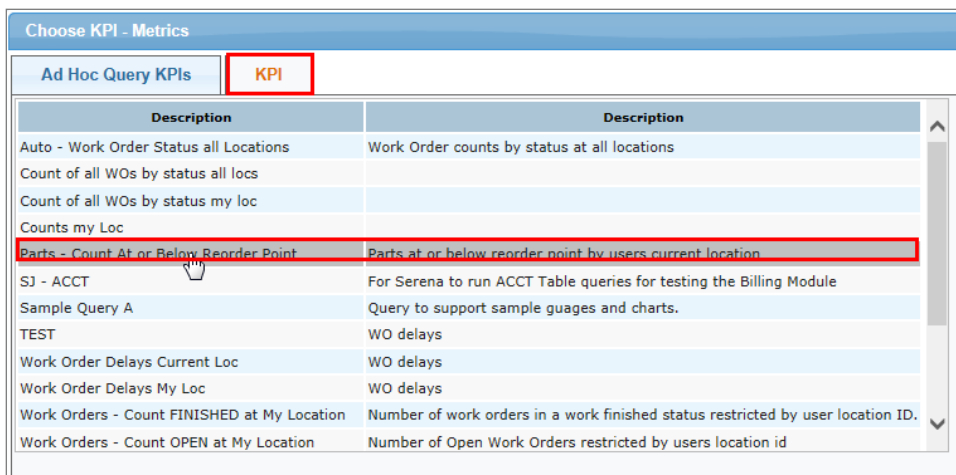
To add a metric to the gadget, follow the steps below:

1. Click **Add**.



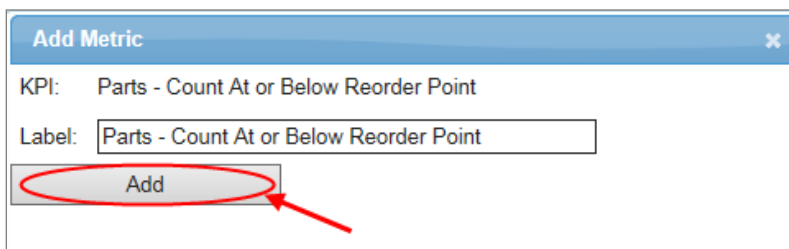
The Choose KPI-Metrics pop-in displays.

2. Select the desired tab (Ad Hoc Query KPIs or KPI) and choose an item from the list.



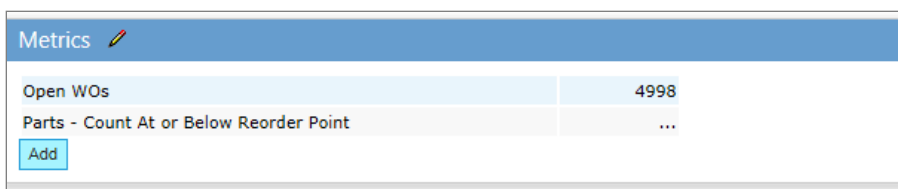
The Add Metric pop-in displays.

3. Modify the label if desired and click the **Add** button.



The 'Add Metric' dialog box is shown. It has a title bar with a close button. Inside, there is a label 'KPI:' followed by the text 'Parts - Count At or Below Reorder Point'. Below that is a 'Label:' field containing the same text. At the bottom is an 'Add' button, which is circled in red with an arrow pointing to it.

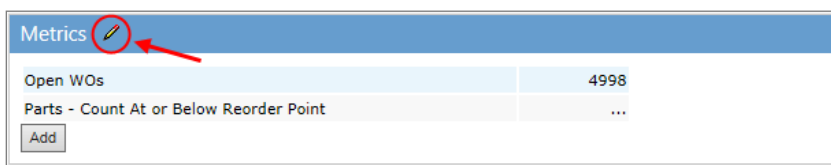
The metric displays in the Metrics gadget on the front page.



The 'Metrics' gadget is shown. It has a title bar with a pencil icon. Below the title bar is a table with two rows. The first row is 'Open WOs' with a value of '4998'. The second row is 'Parts - Count At or Below Reorder Point' with a value of '...'. Below the table is an 'Add' button.

Metrics	
Open WOs	4998
Parts - Count At or Below Reorder Point	...

4. Continue adding metrics by repeating steps 1-3 if desired.
5. Click the **Edit Pencil**  to edit the metrics listed.



The 'Metrics' gadget is shown. The pencil icon in the title bar is circled in red with an arrow pointing to it. The table below it is the same as in the previous image.

Metrics	
Open WOs	4998
Parts - Count At or Below Reorder Point	...

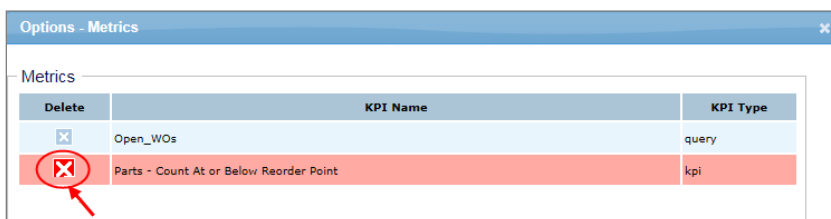
The Options – Metrics pop-in displays.



The 'Options - Metrics' dialog box is shown. It has a title bar with a close button. Inside, there is a section titled 'Metrics' containing a table with three columns: 'Delete', 'KPI Name', and 'KPI Type'. The table has two rows. The first row is 'Open_WOs' with type 'query'. The second row is 'Parts - Count At or Below Reorder Point' with type 'kpi'.

Delete	KPI Name	KPI Type
	Open_WOs	query
	Parts - Count At or Below Reorder Point	kpi

6. Click the **Delete**  button to delete a metric from the list.



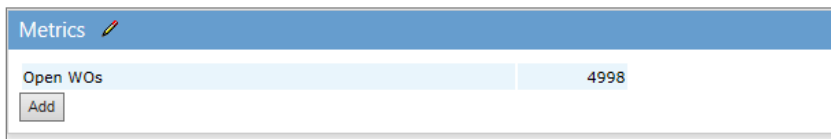
The 'Options - Metrics' dialog box is shown. The 'Delete' button (a red X icon) for the 'Parts - Count At or Below Reorder Point' row is circled in red with an arrow pointing to it. The table below it is the same as in the previous image.

Delete	KPI Name	KPI Type
	Open_WOs	query
	Parts - Count At or Below Reorder Point	kpi

The metric no longer displays in the Metrics list. Click the X in the upper, right corner of the pop-in to return to the Work Management front page.



The metric no longer shows in the Metrics gadget on the front page.



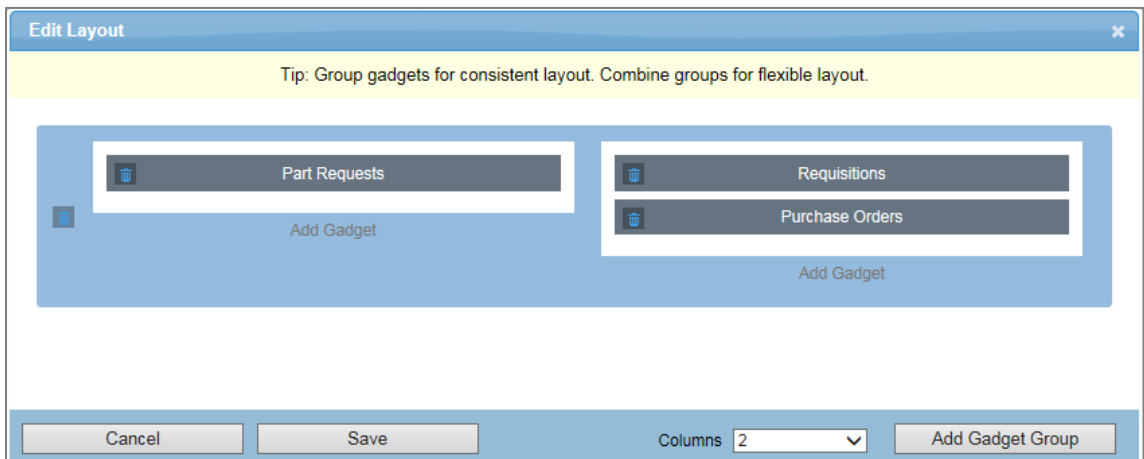
Add a Gadget

The available gadgets will vary depending on the portal you are customizing.

To add a gadget:

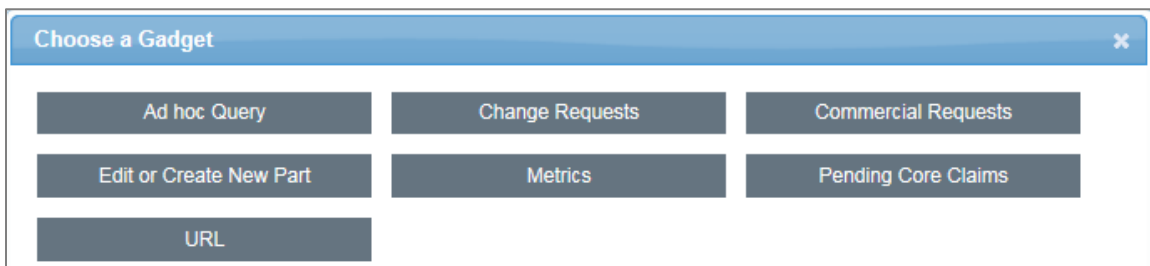
1. To see available gadgets, click **Layout**.

The default gadgets that already show in the portal will show in the Edit Layout pop-in.



2. To see additional gadgets, click **Add Gadget** in the column you want to add your gadget to.

The Choose a Gadget pop-in displays additional gadgets.



3. Click the gadget you want to add.

*Your new gadget displays in the column where you clicked **Add Gadget**.*

4. When you are done, click **Save** to save your changes and update the main page.

Edit a Gadget Title

Each gadget's default title is usually consistent with the gadget's name. However, you may override gadget titles and specify custom text, which is especially useful for multiple-instance gadgets.

- For example, the Open Period Detail gadget can be customized to choose a period. You may want to have two instances to show you the previous open period and current open period, and name these gadgets as such.

To edit the gadget label:

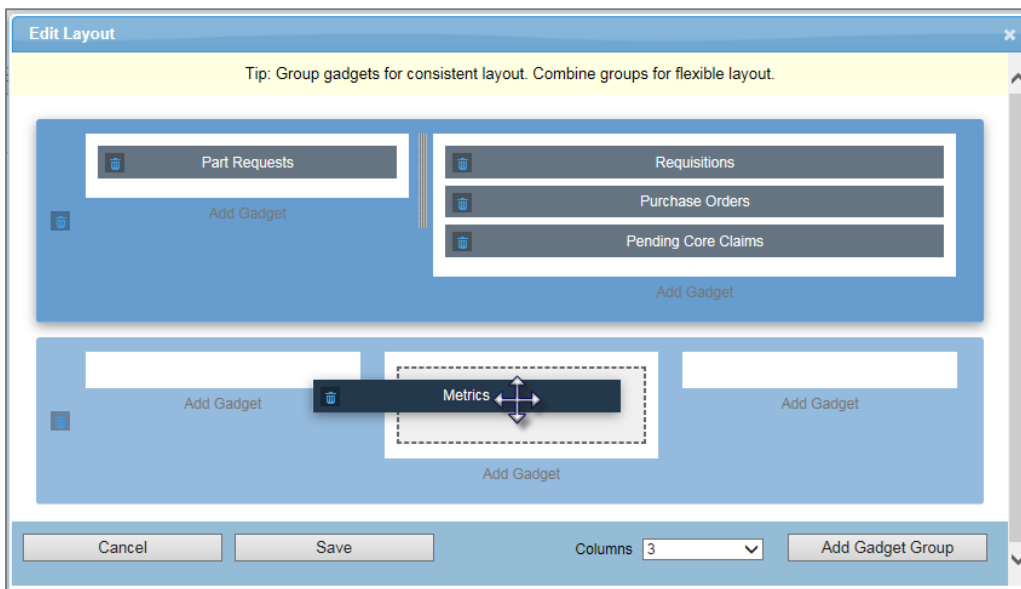
1. Click the name of the gadget.
2. Type the new label text, and press **Enter**.
3. When you are done, click **Save** to save your changes and update the main page.

Reorder Columns and Gadget Layout

You can move individual gadgets to reorder the columns or move to another gadget group. You can also reorder the gadget groups themselves to move them up or down on the page.

To reorder your gadget layout:

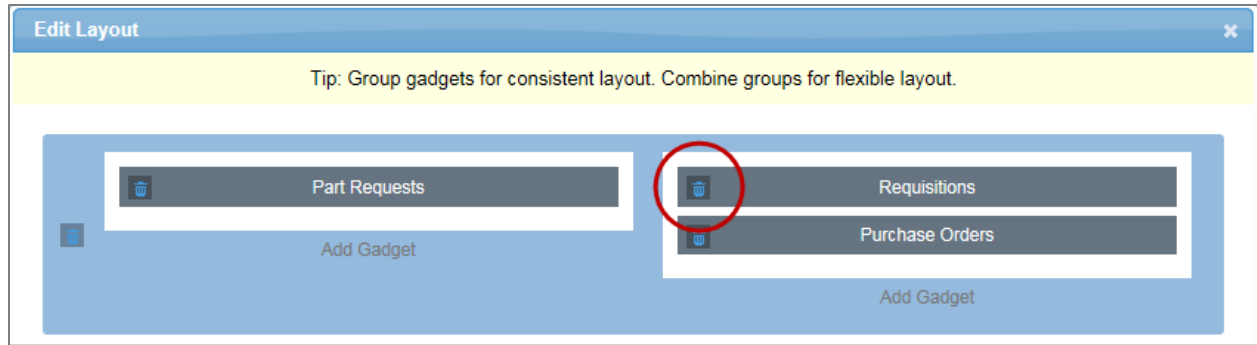
1. Click on the gadget you want to move.
2. Drag the gadget from one column to the other, up and down in the list, or to another gadget group (as shown in the screenshot below).



3. When you are done, click **Save** to save your changes and update the main page.

Delete a Gadget

You can delete an individual gadget on your page.



To delete a gadget:

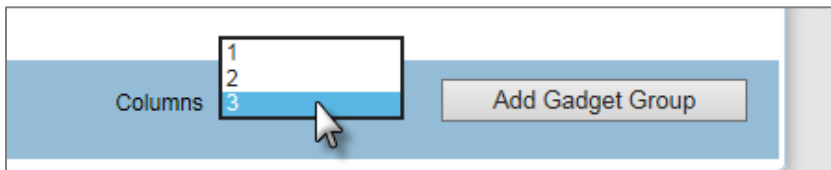
1. Click the trash can icon on the left side of the individual gadget.
2. When you are done, click **Save** to save your changes and update the main page.

Add or Edit a Gadget Group

Add a Gadget Group

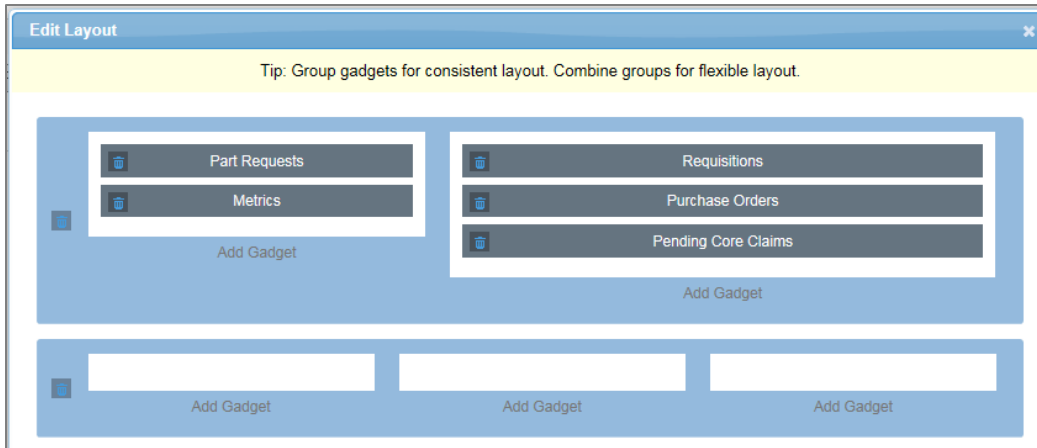
1. In the **Columns** drop-down, choose the number of columns you want the new group to have.

 **Note:** You cannot change the number of columns in an existing group. To add or take away columns, you must add a new gadget group and drag your gadgets to that group.



2. Click **Add Gadget Group**.

Your new gadget group is displayed.



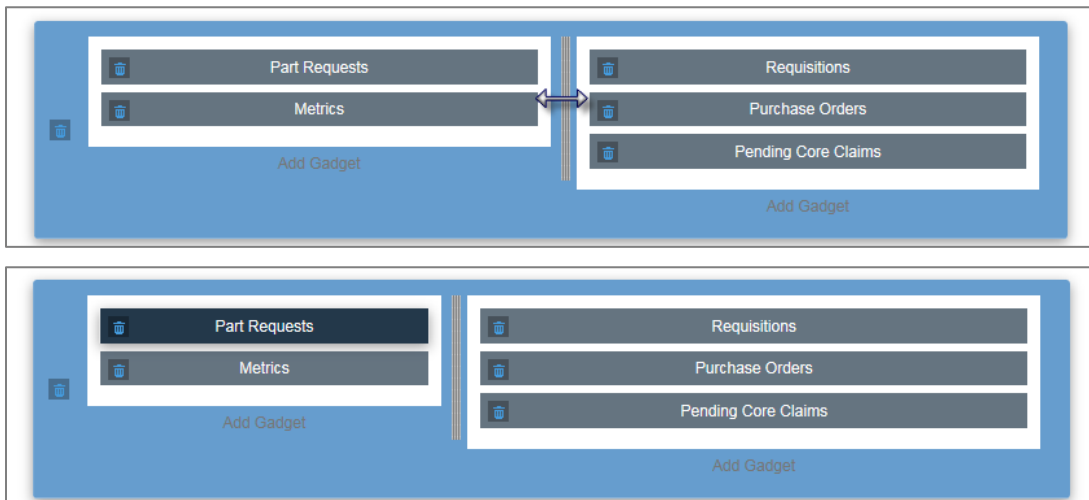
- When you are done, click **Save** to save your changes and update the main page.

Resize Column Width

You can change the size of the columns in the gadget groups. Columns can be sized down to 25% of the page in a multi-column group, or up to 100% of the page if you have one column in a gadget group.

To change the size of a column:

- Hover between two columns to show the double-sided arrow.
- Click and drag the handle to change the size, and release.



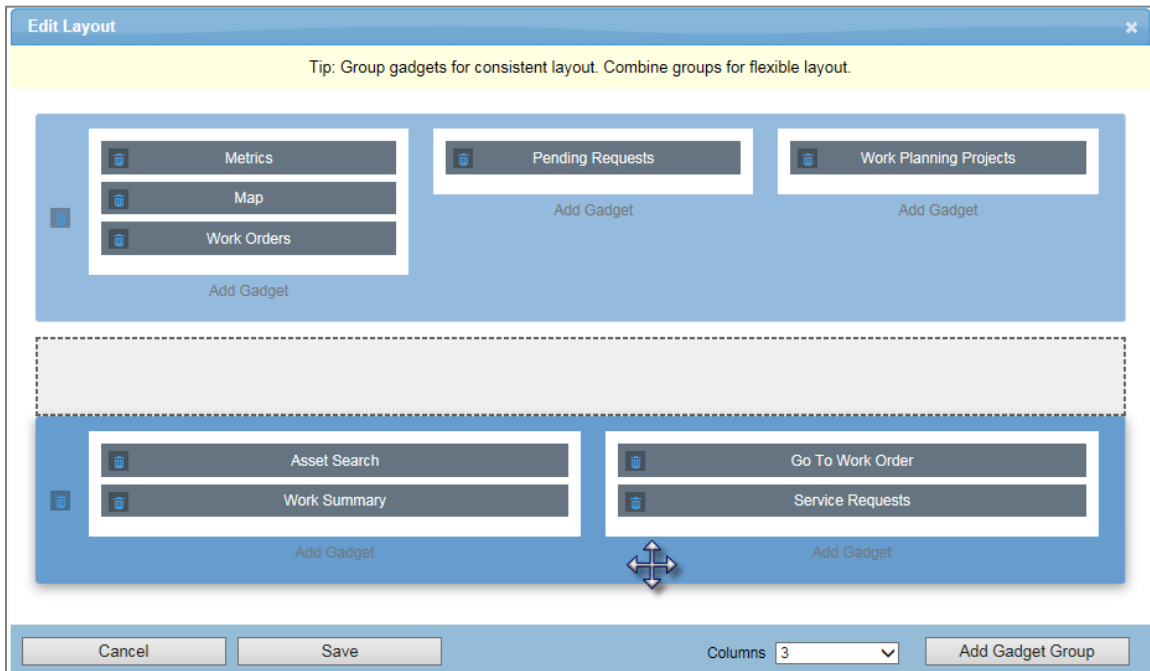
- When you are done, click **Save** to save your changes and update the main page.

Reorder Gadget Groups

You can move individual gadgets to reorder the columns or move to another gadget group. You can also reorder the gadget groups themselves to move them up or down on the page.

To reorder your gadget group layout:

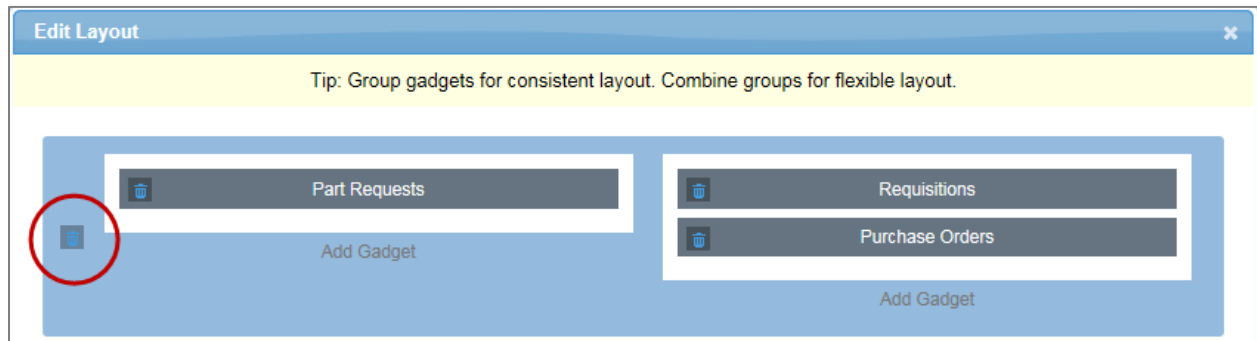
1. Click on the gadget group you want to move.
2. Drag the gadget group up or down. Gadget groups can only be moved up or down the list of groups.



3. When you are done, click **Save** to save your changes and update the main page.

Delete a Gadget Group

You can delete a gadget group on your page.

**To delete a gadget group:**

1. Click the trash can icon on the left side of the gadget group.
2. When you are done, click **Save** to save your changes and update the main page.

4. Assets

This section contains information for assets, along with information for the Asset Chooser and Asset Viewer.

General Asset Information

- When creating assets, the asset IDs can only contain the following characters: **A - Z, 0 - 9**, hyphens (-), periods (.) and spaces.

Asset Chooser

To view detailed asset or component information, or find a specific asset or component, use the Asset Chooser from a search field (such as the **Search Assets** button from the Assets portal, or the **Search** bar from the Shop Activity portals).



Note: Components only display if the **Include Component Assets** option is checked on the Configurator, Asset Index tab.



The Job Scheduler service must be installed and running to create the index files used by the Asset Chooser.

To open the Asset Chooser:

Perform one of the following options:

- Click **Search Assets** on the main Asset portal page
- In the Asset Search gadget click the ellipsis or **Go** buttons
- Click one of the chooser buttons from other search bars throughout the web application

The Asset chooser will open either blank, if no search has been entered yet, or will auto-populate with the information that matches the search entered.

Choose an Asset

Select Attributes profile ▼

Asset ID ▼ Add Filter

Clear Search Assets Search

Saved filters... Save Filter

☐ Include Inactive Assets

Showing 100 of 19977

List Table Map

Map	Details	Asset ID	Description	Asset Type	Asset Category	Address
		2720	1996 NEW FLYER G40 1996 COMPRESSED NATURAL GAS	ASSET	BUS	
		2822	2000 NEW FLYER C40LF 2000 NEW FLYER COMPRESSED	ASSET	BUS	
		2823	2000 NEW FLYER C40LF 2000 NEW FLYER COMPRESSED	ASSET	BUS	
		2824	2000 NEW FLYER C40LF 2000 NEW FLYER COMPRESSED	ASSET	BUS	
		2825	2000 NEW FLYER C40LF 2000 NEW FLYER COMPRESSED	ASSET	BUS	
		2827	2000 NEW FLYER C40LF 2000 NEW FLYER COMPRESSED	ASSET	BUS	
		2830	2000 NEW FLYER C40LF 2000 NEW FLYER COMPRESSED	ASSET	BUS	
		2831	2000 NEW FLYER C40LF 2000 NEW FLYER COMPRESSED	ASSET	BUS	
		2832	2000 NEW FLYER C40LF 2000 NEW FLYER COMPRESSED	ASSET	BUS	
		2833	2000 NEW FLYER C40LF 2000 NEW FLYER COMPRESSED	ASSET	BUS	
		2836	2000 NEW FLYER C40LF 2000 NEW FLYER COMPRESSED	ASSET	BUS	
		2837	2000 NEW FLYER C40LF 2000 NEW FLYER COMPRESSED	ASSET	BUS	
		2844	2000 NEW FLYER C40LF 2000 NEW FLYER COMPRESSED	ASSET	BUS	
		2845	2000 NEW FLYER C40LF 2000 NEW FLYER COMPRESSED	ASSET	BUS	
		2847	2000 NEW FLYER C40LF 2000 NEW FLYER COMPRESSED	ASSET	BUS	
		2850	2000 NEW FLYER C40LF 2000 NEW FLYER COMPRESSED	ASSET	BUS	
		2857	2000 NEW FLYER C40LF 2000 NEW FLYER COMPRESSED	ASSET	BUS	

Cancel

Asset Chooser Filters

Create New or Edit an Asset Chooser Filter

To view and edit an asset chooser filter:

Filters in the Asset Chooser are not saved to the Asset portal filters. Filters are saved in the Asset Chooser, which is then accessible from all other portals that use the Asset Chooser.

1. Open the Asset Chooser.
2. Select a filter from the **Saved Filters** drop-down menu, or enter individual parameters for a new search as follows.
 - If you have attribute profiles set up, select a profile from the Select Attributes profile drop-down.

- Add a parameter to the filter.

 **Note:** Specific asset types can now be used in filters. If selecting ALL for asset types filter, only the types supported by the location and user group will be displayed.

- Use the filter parameter drop-down to choose a different asset type.

- Enter the parameter to the right.

For example: Select **Department Code** and enter the department of the assets you want to see.

 **Note:** Autocomplete does not display more than 100 suggestions and will only display supported types. For fields which are for unique records (such as individual records like Asset ID, Description, etc), autocomplete is not enabled, as this would slow down performance.

For example (in the screenshots below), you can further refine the filter by using wildcards (%) to search. In this example, the Description attribute is selected, and %**HONDA**% is the search criteria to display assets that have **HONDA** in the description when this user clicks **Add Filter**. Place the % on the end of the text

you are omitting, or on both sides of the text to search for that text that is not on an end of the entry.

Map	Details	Asset ID	Description	Asset
		AUTO001	2011 HONDA CIVIC AUTOMATION - DO NOT MODIFY	ASSET
		AUTO002	2012 HONDA CIVIC AUTOMATION - DO NOT MODIFY	ASSET
		AUTO003	2012 HONDA CIVIC AUTOMATION - DO NOT MODIFY	ASSET

Add a search for Description.

Map	Details	Asset ID	Description	Asset Type	Asset
		AUTO001	2011 HONDA CIVIC AUTOMATION - DO NOT MODIFY	ASSET	AUTO
		AUTO002	2012 HONDA CIVIC AUTOMATION - DO NOT MODIFY	ASSET	AUTO
		AUTO003	2012 HONDA CIVIC AUTOMATION - DO NOT MODIFY	ASSET	AUTO

The search is refined down with the new parameter.

- Type an asset ID into the Search field. You can search for partial matches as well, along with common search methods using **and**, **or**, **-**, or **+**.

- Click the **X** next to any filter to delete that filter.

Choose an Asset

Select Attributes profile ▾

Description ▾ Add Filter Clear All ?

Department Code X AUTO% Description X %HONDA%

Asset Category
☐ AUTO-SEDAN-01: 9

Asset Type
☐ ASSET: 9

Showing 9 of 9

Map	Details	Asset ID	Description
		AUTO001	2011 HONDA CIVIC A - DO NOT MODIFY
		AUTO002	2012 HONDA CIVIC A - DO NOT MODIFY

- To include inactive assets, check the **Include Inactive Assets** checkbox.

Search Search

Saved filters... Save Filter

☒ Include Inactive Assets

- Check one of the checkboxes on the left to add other filters to filter the results down further.

Choose an Asset

Select Attributes profile ▾

Description ▾ Add Filter Clear All ?

Department Code X AUTO% Description X %HONDA%

Asset Category
☐ AUTO-SEDAN-01: 9

Asset Type
☐ ASSET: 9

Color
☐ GRAY: 9

Condition ID
☐ AUTO-GOOD: 3

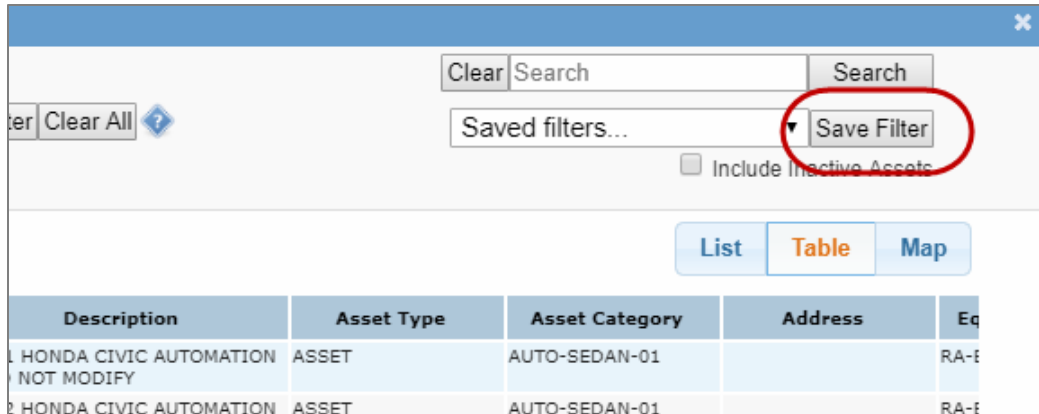
Equipment Type
☐ RA-EQTYPE-01: 9

Lifecycle Status Code

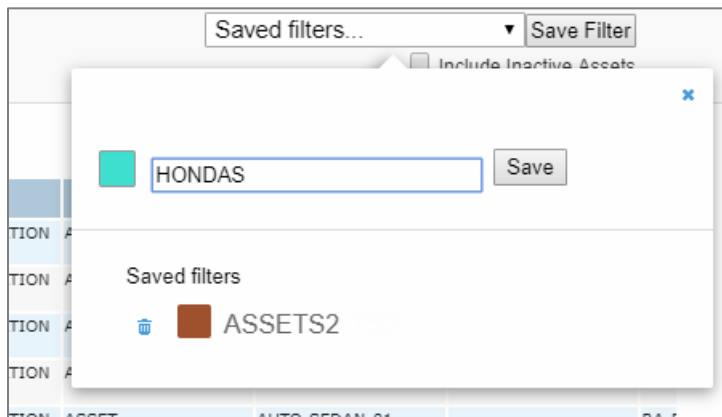
Showing 9 of 9

Map	Details	Asset ID	Description
		AUTO001	2011 HONDA CIVIC AUTOMAT - DO NOT MODIFY
		AUTO002	2012 HONDA CIVIC AUTOMAT - DO NOT MODIFY
		AUTO003	2012 HONDA CIVIC AUTOMAT - DO NOT MODIFY
		AUTO004	2012 HONDA CIVIC AUTOMAT - DO NOT MODIFY
		AUTO005	2012 HONDA CIVIC AUTOMAT - DO NOT MODIFY
		AUTO006	2013 HONDA CIVIC AUTOMAT - DO NOT MODIFY
		AUTO007	2013 HONDA CIVIC AUTOMAT

- When you are done editing, in the top-right corner of the page, click **Save Filter**.



4. Enter a name and choose a color for the new filter. If saving over a previous filter, select that filter from the list.



5. Click **Save**.

The filter options are saved. This filter will be accessible throughout the other portals that use the Asset Chooser.

To update an old filter:

If using filters created prior to version 18.0, update the filter if it was pointing to a specific asset type by changing the asset type field to ALL or choose the specific type.

View and Select an Asset

You can view detailed information for an asset from the asset viewer, or, if you open the asset viewer from an area where you need to select a certain asset for a task (such as choosing an asset for a work order), you can select an asset, or multiple assets from the chooser as well.

1. Open the Asset Chooser.
2. Select a filter from the **Saved Filters** drop-down menu, or enter individual parameters for a new search as follows.

- If you have attribute profiles set up, select a profile from the Select Attributes profile drop-down.

- Add a parameter to the filter such as **Asset ID**.
 - Use the filter parameter drop-down to choose a different asset type. Note: Only supported types will auto-complete.

- Enter the parameter to the right.

For example: Select **Department Code** and enter the department of the assets you want to see.

For example (in the screenshots below), you can further refine the filter below by using wildcards to search. In this example, the Description attribute is selected, and **%HONDA%** is the search criteria to display assets that have **HONDA** in the description when this user clicks **Add Filter**. Place the **%** on the end of the text you are omitting, or on both sides of the text to search for that text that is not on an end of the entry.

Choose an Asset

Select Attributes profile ▾

Description ▾ %HONDA% Add Filter Clear All ⓘ

Department Code X AUTO%

Asset Category

- ☐ ATC: 2
- ☐ AUTO-SEDAN-01: 9
- ☐ BUS: 1

Asset Type

- ☐ ASSET: 12
- ☐ RAIL: 1

Showing 13 of 13

Map	Details	Asset ID	Description	Asset
		AUTO001	2011 HONDA CIVIC AUTOMATION - DO NOT MODIFY	ASSET
		AUTO002	2012 HONDA CIVIC AUTOMATION - DO NOT MODIFY	ASSET
		AUTO003	2012 HONDA CIVIC AUTOMATION - DO NOT MODIFY	ASSET

Add a search for Description.

Choose an Asset

Select Attributes profile ▾

Description ▾ Add Filter Clear All ⓘ

Department Code X AUTO% Description X %HONDA%

Asset Category

- ☐ AUTO-SEDAN-01: 9

Asset Type

- ☐ ASSET: 9

Color

- ☐ GRAY: 9

Condition ID

- ☐ AUTO-GOOD: 3

Equipment Type

- ☐ RA-EQTYPE-01: 9

Lifecycle Status Code

- ☐ 3: 9

Maint Class

- ☐ AUTO-SEDAN-01: 4
- ☐ RA-SEDAN-01: 5

Showing 9 of 9

Map	Details	Asset ID	Description	Asset Type	Asset
		AUTO001	2011 HONDA CIVIC AUTOMATION - DO NOT MODIFY	ASSET	AUTO
		AUTO002	2012 HONDA CIVIC AUTOMATION - DO NOT MODIFY	ASSET	AUTO
		AUTO003	2012 HONDA CIVIC AUTOMATION - DO NOT MODIFY	ASSET	AUTO
		AUTO004	2012 HONDA CIVIC AUTOMATION - DO NOT MODIFY	ASSET	AUTO
		AUTO005	2012 HONDA CIVIC AUTOMATION - DO NOT MODIFY	ASSET	AUTO
		AUTO006	2013 HONDA CIVIC AUTOMATION - DO NOT MODIFY	ASSET	AUTO
		AUTO007	2013 HONDA CIVIC AUTOMATION - DO NOT MODIFY	ASSET	AUTO
		AUTO008	2011 HONDA CIVIC AUTOMATION - DO NOT MODIFY - FUEL LIMIT	ASSET	AUTO
		AUTO009	2011 HONDA CIVIC AUTOMATION - DO NOT MODIFY - FUEL LIMIT	ASSET	AUTO

The search is refined down with the new parameter.

- Search for assets by entering information such as an asset ID, address (this includes assets with multiple addresses), etc. You can search for partial matches as well, along with common search methods using **and**, **or**, **-**, or **+**. Note: Searches will only include supported types.

Clear 2015 Search

Saved filters... Save Filter

☐ Include Inactive Assets

Clear 2000 and chevy Search

Saved filters... Save Filter

☐ Include Inactive Assets

- To include inactive assets, check the **Include Inactive Assets** checkbox.

Search Search

Saved filters... Save Filter

☒ Include Inactive Assets

- Click the **X** next to any filter to delete that filter.

Choose an Asset

Select Attributes profile ▾

Description ▾ Add Filter Clear All ?

Department Code X AUTO% Description X %HONDA%

Asset Category Showing 9 of 9

☐ AUTO-SEDAN-01: 9

Asset Type

☐ ASSET: 9

Map	Details	Asset ID	Description
		AUTO001	2011 HONDA CIVIC AUTOMAT - DO NOT MODIFY
		AUTO002	2012 HONDA CIVIC AUTOMAT - DO NOT MODIFY
		AUTO003	2012 HONDA CIVIC AUTOMAT - DO NOT MODIFY
		AUTO004	2012 HONDA CIVIC AUTOMAT - DO NOT MODIFY
		AUTO005	2012 HONDA CIVIC AUTOMAT - DO NOT MODIFY
		AUTO006	2013 HONDA CIVIC AUTOMAT - DO NOT MODIFY
		AUTO007	2013 HONDA CIVIC AUTOMAT

- Check one of the checkboxes on the left to add other filters to filter the results down further.

Choose an Asset

Select Attributes profile ▾

Description ▾ Add Filter Clear All ?

Department Code X AUTO% Description X %HONDA%

Asset Category Showing 9 of 9

☐ AUTO-SEDAN-01: 9

Asset Type

☐ ASSET: 9

Color

☐ GRAY: 9

Condition ID

☐ AUTO-GOOD: 3

Equipment Type

☐ RA-EQTYPE-01: 9

Lifecycle Status Code

Map	Details	Asset ID	Description
		AUTO001	2011 HONDA CIVIC AUTOMAT - DO NOT MODIFY
		AUTO002	2012 HONDA CIVIC AUTOMAT - DO NOT MODIFY
		AUTO003	2012 HONDA CIVIC AUTOMAT - DO NOT MODIFY
		AUTO004	2012 HONDA CIVIC AUTOMAT - DO NOT MODIFY
		AUTO005	2012 HONDA CIVIC AUTOMAT - DO NOT MODIFY
		AUTO006	2013 HONDA CIVIC AUTOMAT - DO NOT MODIFY
		AUTO007	2013 HONDA CIVIC AUTOMAT

- To view specific information for an asset, click the zoom icon for the asset.

Note: If you click the asset itself and not the zoom button, the Asset Chooser closes and you either the Asset Viewer opens for that asset, or the asset is selected for the task. Do not click the row itself if you wish to keep the Asset Chooser open.

Map	Details	Asset ID	Description
		AUTO001	2011 HONDA CIVIC AUTOMATION - DO NOT MODIFY
		AUTO002	2012 HONDA CIVIC AUTOMATION - DO NOT MODIFY
		AUTO003	2012 HONDA CIVIC AUTOMATION - DO NOT MODIFY
		AUTO004	2012 HONDA CIVIC AUTOMATION - DO NOT MODIFY
		AUTO005	2012 HONDA CIVIC AUTOMATION - DO NOT MODIFY
		AUTO006	2013 HONDA CIVIC AUTOMATION

The Asset Viewer for that asset displays in a separate pop-in.

Asset Viewer

Equipment ID: **AUTO002** 2012 HONDA CIVIC AUTOMATION - DO NOT MODIFY MILES **1840**

Service Status:

Manage Work Work History

Basic Info

Codes

Scheduled Svcs

Warranty

Attributes

Bill of Materials

Parts Used

Files

Comments/Notes

Relationships

Basic Info

Model Year: 2012
 Manufacturer: HONDA
 Model: CIVIC
 Equipment Type: EQTYPE-01
 Description: AUTOMATION - DO NOT MODIFY
 Color: GRAY
 Serial Number:
 Asset Number:
 Asset Category: AUTO-SEDAN-01 - AUTOMATION ASSET
 Asset Type: ASSET

Meter Info

Meter Types Class: SEDAN-01
 Meter 1: 1840 MILES
 Meter 1 Life Total: 1840 MILES

Locations

Assigned PM: AUTO-RPR2 - AUTOMATION - REPAIR - ALT
 Assigned Repair: AUTO-RPR2 - AUTOMATION - REPAIR - ALT
 Assigned Mobile:
 Station:
 Stored:
 Current:
 Parking Stall:

Assignment Info

Department: AUTOMATION - AUTOMATION - DO NOT MODIFY
 Operator:
 Work Phone:
 Email Address:
 Department: AC-DEPT - AC DEPARTMENT
 License Expires: 04/10/2024

Acquisition

Delivery Date:
 In Service Date:
 Months Remaining: 0
 Original Cost:
 Capitalized Value:
 Original Cost + Capitalized Value:
 Estimated Replacement Month: 0
 Estimated Replacement Year: 0

Historical Costs

Motor Pool:

4. Click the x in the top-right corner to close the viewer when you are done.
5. Select the assets you want to use.
 - To select one asset, click the line to select the asset.
 - To select multiple assets if necessary, hold Shift and click to select a range in the list, or hold Ctrl and click single assets to select multiples scattered in the list.

Map	Details	Asset ID	Description	Asset Type	Asset Category	Address
		AUTO001	2011 HONDA CIVIC AUTOMATION - DO NOT MODIFY	ASSET	AUTO-SEDAN-01	
		AUTO002	2012 HONDA CIVIC AUTOMATION - DO NOT MODIFY	ASSET	AUTO-SEDAN-01	
		AUTO003	2012 HONDA CIVIC AUTOMATION - DO NOT MODIFY	ASSET	AUTO-SEDAN-01	
		AUTO004	2012 HONDA CIVIC AUTOMATION - DO NOT MODIFY	ASSET	AUTO-SEDAN-01	
		AUTO005	2012 HONDA CIVIC AUTOMATION - DO NOT MODIFY	ASSET	AUTO-SEDAN-01	
		AUTO006	2013 HONDA CIVIC AUTOMATION - DO NOT MODIFY	ASSET	AUTO-SEDAN-01	
		AUTO007	2013 HONDA CIVIC AUTOMATION - DO NOT MODIFY	ASSET	AUTO-SEDAN-01	
		AUTO008	2011 HONDA CIVIC AUTOMATION - DO NOT MODIFY - FUEL LIMIT	ASSET	AUTO-SEDAN-01	
		AUTO009	2011 HONDA CIVIC AUTOMATION - DO NOT MODIFY - FUEL LIMIT	ASSET	AUTO-SEDAN-01	

6. When you are done selecting assets, click **OK**.

Location Security Rights in Asset Chooser

The Asset Chooser will appropriately restrict access to assets based on the current users Location Access Rights template. There are places across the web modules where organizations may want it to display all assets in the system, such as the Service Request

portal. In this case, the Screen ID must be % on the location rights template. The asset chooser will detect this and will not enforce location security rights when it is opened from that web page.

Filters in Asset Chooser

Administrators can now share saved Asset Chooser filters to defined User Groups by clicking the "Share" button after selecting a saved filter.

- Asset Chooser filters are organized into shared and personal sections.
- Filters that you have shared with other users will be indicated with a sharing icon.
- Administrator can overwrite filters shared with them by other admins, but only if no other filters with that name are in the list.
- To rename or edit an existing filter, click on the name of the filter from the filter save dialog. To rename it, click one from the list before changing the name. To simply overwrite it, click it and then click Save.

Asset Viewer

Throughout several portals, including the Asset portal and Shop Activity, the Asset Viewer gives you the ability to view an equipment unit's relationship tree. It provides many details about the equipment unit including PM information, meter and usage information, links to Enterprise Portal screens, and more. Information and fields that display depend on the type of asset, and if the information is available or entered for those items. For instance, if an asset is not a linear asset, linear asset information and fields will not display.

On many Shop Activity pages or from the Asset Chooser, click the Equipment ID zoom icon to open the Asset Viewer.

 **Note:** For linear assets, to the right of the asset ID and zoom button, there is an Attributes icon . Click this icon to see attributes and information for the liner asset.

Work Order Main			
Asset ID	CAR01: V-EQTYPE 		
Asset Number	ASSET001	Station Location	OPS
License Number		Repair Location	OPS
Operator Name			
Work Order ID	1-2017-38 	Job Status	OPEN
Job Type	REPAIR	Technician	
WO Meter 1	0 MILES	WO Meter 2	0 HOURS
Contact Name		Projected Completion Date	04/04/2017 04:00

The Asset Viewer displays the following key information about the asset (accessed from the tabs on the left side of the viewer).

General Information

The information in the top section of the Asset Viewer is available no matter which tab is open below.

The screenshot shows the 'Asset Viewer' window for a specific asset. At the top, there's a header bar with the title 'Asset Viewer'. Below it, a small image of the asset (a blue bus) is shown on the left. To the right of the image, key information is displayed: Equipment ID (GI-PH-2019-0001), Service Status (2019 GILLIG PHANTOM 2019 GILLIG PHANTOM), and Configuration Compliance (checked). Below this, there are two buttons: 'Manage Work' and 'Work History'.

The main content area is divided into several sections:

- Basic Info:** A table listing details like Model Year (2019), Manufacturer (GILLIG CORPORATION), Model (PHANTOM), Equipment Type (GI-PH-2019), Description (2019 GILLIG PHANTOM), Color (BLUE), Serial Number (GI-PH-2019-0001), Asset Number, Asset Category, and Asset Type (BUS).
- Assignment Info:** A table showing Department (MAINT - SPOKANE MAINTENANCE).
- Position:** A table showing Latitude (47.680281) and Longitude (-117.224432).
- Motor Pool:** A table showing Dispatch Status and Dispatch Location.
- Meter Info:** A table showing Meter Types Class (ROLLING-STOCK-MILEAGE), Meter 1 (0 MILES), and Meter 1 Life Total (0 MILES).
- Locations:** A table showing Assigned PM (SPO-MAINT - SPOKANE MAINTENANCE FACILITY), Assigned Repair (SPO-MAINT - SPOKANE MAINTENANCE FACILITY), Assigned Mobile, Station (SPO-BUS - SPOKANE BUS STORAGE), Stored (SPO-BUS - SPOKANE BUS STORAGE), Current (SPO-BUS - SPOKANE BUS STORAGE), and Parking Stall.
- Acquisition:** A table showing Delivery Date, In Service Date, Months Remaining (0), Original Cost, Capitalized Value, Original Cost + Capitalized Value, and Estimated Replacement Month (0).

On the left side of the main content area, there is a sidebar with various tabs: Basic Info, Codes, Scheduled Svcs, Warranty, Attributes, Bill of Materials, Parts Used, Files, Comments/Notes, Relationships, and Map.

Image or Icon

If there is an image associated with the asset, the image displays in the top-left corner. If an asset's image is not valid, the Asset Type icon will be displayed instead. If the associated file has been deleted or removed, the browser will display a broken link icon. The following extensions are allowed for image fields: .gif, .bmp, .jpg, .png, .jpeg.

Links

The hyperlinked item opens the following screen. When the screen opens, it opens to the record associated with the asset.

- **Equipment ID:** Opens the Asset Primary Information screen.

Service Status

Configuration Compliance

Indicates the current Configuration Compliance result for the asset. The following icons are used to indicate whether the asset is compliant or not:

-  No compliance violations.
-  Configuration violations exist but do not require taking the asset out of service.
-  Configuration violations exist that require taking the asset out of service

Manage Work Button

Click **Manage Work** to open the Current and Pending Work page for the asset currently loaded in the viewer.

Work History Button

Click **Work History** to open the Equipment History page for the asset currently loaded in the viewer.

Basic Information

- Basic Info - Codes - Scheduled Svcs - Warranty - Attributes - Bill of Materials - Parts Used - Files - Comments/Notes - Relationships	Basic Info Model Year: 2012 Manufacturer: HONDA Model: CIVIC Equipment Type: EQTYPE-01 Description: AUTOMATION - DO NOT MODIFY Color: GRAY Serial Number: Asset Number: Asset Category: AUTO-SEDAN-01 - AUTOMATION ASSET Asset Type: ASSET Assignment Info Department: AUTOMATION - AUTOMATION - DO NOT MODIFY Operator: Work Phone: Email Address: Department: AC-DEPT - AC DEPARTMENT License Expires: 04/10/2024 Motor Pool:	Meter Info Meter Types Class: SEDAN-01 Meter 1: 1840 MILES Meter 1 Life Total: 1840 MILES Locations Assigned PM: AUTO-RPR2 - AUTOMATION - REPAIR - ALT Assigned Repair: AUTO-RPR2 - AUTOMATION - REPAIR - ALT Assigned Mobile: Station: Stored: Current: Parking Stall: Acquisition Delivery Date: In Service Date: Months Remaining: 0 Original Cost: Capitalized Value: Original Cost + Capitalized Value: Estimated Replacement Month: 0 Estimated Replacement Year: 0 Historical Costs
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Links

The hyperlinked items open the following screens. When the screens open, they open to the record associated with the asset.

- **Manufacturer:** Opens the Equipment Manufacturers screen.
- **Equipment Type:** Opens the Equipment Types screen.

- **Department:** Opens the Departments screen.
- **Operator:** Opens the Operators – Primary Information screen.
- **Meter Types Class:** Opens the Equipment Class – Primary Information screen.
- **Locations Section:** All links in the Locations section open the Locations – Primary Information screen.
- **Historical Costs:** Opens the Equipment – Historical Costs screen.

Codes

Basic Info	Codes	
Codes	License No Issuing Government Registration expiration date Life Cycle Status Code 3 - OPERATION SUPPORT Supports Any Fuel or Fluid Type N Condition Rating	
Scheduled Svcs	Standards Class/Task Info	
Warranty		
Attributes		
Bill of Materials		
Parts Used		
Files		
Comments/Notes		
Relationships		

Supported Fuel/Fluid Types		
Fuel/Fluid Type	Description	Capacity
D	DIESEL	25.00

Links

The hyperlinked items open the following screens. When the screens open, they open to the record associated with the asset.

- **Standards Class/Task Info:** Opens the Class/Task Information screen.
- **Fuel/Fluid Type:** Opens the Fuel Types or Fluid/Product Types screen depending on the type of fluid.

Scheduled Services

- Basic Info - Codes - Scheduled Svcs - Warranty - Attributes - Bill of Materials - Parts Used - Files - Comments/Notes - Relationships	Scheduled Services		Last Performed				
	PM Program Type	CLASS	Last Performed	11/06/2013			
	Next PM Service	A - PM SERVICE A	Last Performed Service	B - PM SERVICE B			
	Next PM Due Date	11/08/2013	Last performed work order ID	AUTO-RPR2-2013-2188			
	Next PM due at Meter 1 reading	5350 MILES	Life Meter 1 at Last PM	350 MILES			
			Quantity Fuel Used Since Last PM	0.0			
	Maintenance Calendar						
	< > Today October 2018 Month Week Day						
	Sun	Mon	Tue	Wed	Thu	Fri	Sat
	30	1	2	3	4	5	6
7	8	9	10	11	12	13	
14	15	16	17	18	19	20	

Warranty

- Basic Info - Codes - Scheduled Svcs - Warranty - Add Data - Bill of Materials - Parts Used - Files - Comments/Notes - Relationships	Warranty Info				
	Vendor ID	Expiration Date	Meter 1 Expiration	Meter 2 Expiration	Warranty Type
	3596-12337	01/01/2017	0	0	
	Component Warranty Info				
	Component	Vendor	Expiration Date ▲	Meter 1 Expiration	Type

Attributes

Associated attributes are listed in the Attributes section. Only attributes that are marked active will display in the Asset Viewer. The **Active** checkbox is in the Enterprise Portal Equipment Units Attributes screen.

Asset Viewer

Equipment ID: **0000001** 2005 DETROIT DIESEL S50CNG SERIES 50 DETROIT DIESEL GAS ENGINE
 Service Status: **SS-001** SERIES 50 DETROIT DIESEL GAS ENGINE MILES **2751**

Manage Work **Work History**

Basic Info
Codes
Scheduled Svcs
Warranty
Attributes
Bill of Materials
Parts Used
Files
Comments/Notes
Relationships

Attributes

Add Attribute **Expand All** **Collapse All**

☒ Include Data from Related Assets

☐ 0000001: 2005 DETROIT DIESEL S50CNG==Meters: 1-2751 MILES; 2-0 NONE==SERIES 50 DETROIT DIESEL GAS ENGINE

☐ **ACCESS POINT**

LENGTH - : 1.0000

☐ **-SUB-002**

PROP-005 - PROP 5: 5.0000 1005-0 DEF5

From this section do the following to add or edit attribute information:

- To add attributes:

Note: Adding attributes will clear any edits you have already made that have not been saved.

- Click **Add Attributes**.
- The Attributes pop-in displays.

Attributes

Add Attribute

Attribute: ...

Property: ...

Text Value:

Numeric Value:

Date Value:

Cancel **Add**

- Select the attribute from the attribute chooser, and enter attribute information.
- When you are done adding information, click **Add**. Click **Cancel** at any time to cancel this action and close the pop-in.

The attribute is added.

- To edit values on the attributes listed:

- i. Click **Edit Values** to open the Edit Asset Attributes pop-in.

Attribute	Property	Value
ACCESS POINT	TYPE	Text Value: TEST ...

Cancel Save

- ii. Edit the information as needed.

- iii. Click **Save**.

- To edit asset class and type level attributes:

- i. Click the property to launch the Enterprise Portal attributes screen.



Note: This screen will only launch if you have rights to it.

Additional Data

Basic Info		Additional Data	
Codes		☒ Include Data from Related Assets	
Scheduled Svcs		BRIDGE DECK BRG-BARKER	
Warranty		LAST RESURFACE DATE DATE TEST Jul 7 2010 12:00AM	
Add Data		BRIDGE DECK BRG-BARKER	
Bill of Materials		NUMBER OF SECTIONS QTY TEST 4.0000	
Parts Used		BRIDGE DECK BRG-BARKER	
Files		SQUARE METERS 3600.0000 CNPART001-0	
Comments/Notes		BRIDGE DECK BRG-BARKER	
Relationships		SURFACE COVERING DESC TEST ASPHALT CONCRETE	
Map		BRIDGE DECK BRG-BARKER	

Bill of Materials

Basic Info		Bill of Materials				
Codes		☒ Include Data from Related Assets				
Scheduled Svcs		Equipment ID	Attribute	Property	Description	Part ID
Warranty		AUTO002	ALTERNATOR	AIR CONDITIONING	AIR CONDITIONING	Qty
Attributes		AUTO002	ALTERNATOR	AIR PUMP	AIR PUMP	OEM Part No
Bill of Materials		AUTO002	ALTERNATOR	ALTERNATOR	ALTERNATOR	
Parts Used		AUTO002	SUB-001	PROP-001	PROP 1	1.0000
Files						
Comments/Notes						
Relationships						

Parts Used

Basic Info	Parts Used Most Often					
Codes	☒ Show Parts for Equipment Type Instead of Individual Asset					
Scheduled Svcs	Part Number	Suffix	Manuf Part No	Manufacturer	Keyword	Description
Warranty	12658	0			FILTER- OIL (GE	FILTER, OIL, SIZE 1036, TYPE CHEVY, DESC V-6, PACKAGED 12/EA
Addl Data	12965	0			BATTERY- WET CE	BATTERY, WET CELL, TOP/SIDE POST, VOLTAGE 12, SIZE 10 1/4 (L
Bill of Materials	20303	0			SOLVENT- WINDSH	SOLVENT, WINDSHIELD WASHING, WITH ETHANOL, ONE GALLON CONTAI
Parts Used	27485	0			FILTER- AIR	FILTER, AIR, 1998 TRUCK, ENGINE, 4.3 V6. USE ON YEAR MODEL T
Files	27486	0			PAD- BRAKE	PAD, BRAKE, BLAZER, REAR END, LEFT-RIGHT. USE ON YEAR MODELS
Comments/Notes	27763	0			DEODORIZER- ENZ	DEODORIZER, ENZYME, 1 GALLON BOTTLE, LIQUID, CLEANER, USED F
Relationships	28920	0			PAD- BRAKE	PAD, BRAKE, 1998-99, S-10 BLAZER, HEAVY DUTY PADS FITS 4X4 A
	30806	0			FILTER- OIL	FILTER, OIL, 04 L/VAN, ENGINE, SPIN ON USED ON 2004 L/VANS W
	Showing 8 records					

Related Links/Files

Basic Info	Related Links / Files	
Codes	2000-chevrolet-blazer.jpg	
Scheduled Svcs		
Warranty		
Addl Data		
Bill of Materials		
Parts Used		
Files		
Comments/Notes		
Relationships		

Links

The hyperlinked item opens the following screen. When the screen opens, it opens to the record associated with the asset.

- **Related Links/Files:** Opens the attached file.

Comments/Notes

Basic Info	Comments
Codes	THIS IS A SOLID CAR, BUT HAS BEEN AROUND THE BLOCK AND MAY NEED SOME BODY WORK.
Scheduled Svcs	Messages
Warranty	TECH NEEDS TO TAKE A FULL LOOK AT ENGINE TO ENSURE PROPER WORKING ORDER.
Addl Data	Notes
Bill of Materials	
Parts Used	
Files	
Comments/Notes	
Relationships	

Relationships

Basic Info	Component Relationships ☐ Show Attributes ☐ Show Bill of Materials Expand All Collapse All 121: 1970 ALUMINUM HEAVY RAIL TRANSIT CAR 00016: FRONT TRUCK RAIL CAR 121: 1980 BRAKE SYSTEM
Scheduled Svcs	
Bill of Materials	
Parts Used	
Comments/Notes	
Relationships	

Expand All and **Collapse All** buttons control the visual state of the component hierarchy that displays.

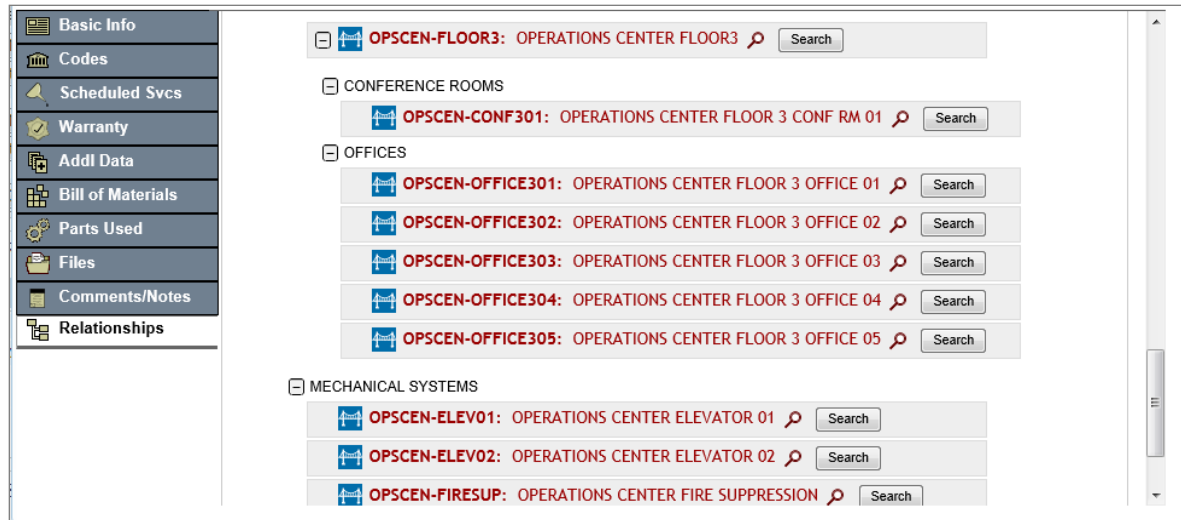
Links

The hyperlinked item opens the following screen. When the screen opens, it opens to the record associated with the asset.

- **Relationship hyperlink:** Opens the Asset Primary Information screen.
- **Property hyperlink:** Opens the Attributes screen if the user has rights to that screen.

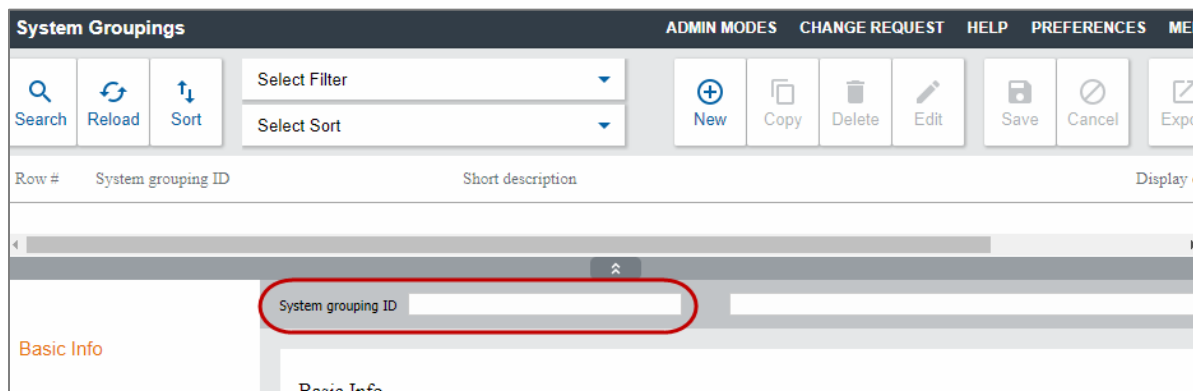
Positional Information

The Position field displays for components with positional information (as shown below).



The component tree above is grouped by child asset System Group. The Equipment Unit System Groupings screen allows you to organize large systems comprised of multiple subsystems. For example, this screen may be used to define a building as one system comprised of several subsystems such as electrical, HVAC, lighting, plumbing, etc. System grouping allows you to assign like assets to groups such as assigning the electrical system grouping ID to all assets associated with the electrical system including wiring, switches, bulbs, etc.

Define a system grouping ID on the Equipment Units System Groupings screen.



On the System Groupings screen Basic Info tab, complete the following fields as desired:

- **Short description:** Brief description of system group
- **Active:** Check sets as Active
- **Display order:** Display order sets the order for the system group to display in the Asset Viewer. System Grouping Display Order can be negative integer and "0" is considered higher than "9999".

For Example: The numbers below illustrate how display order works:

- -999, -99, -3, -2, -1, 1, 2, 3, 99, 999, 9999, 0, null
where **null** is any asset that does not have a system group assigned, and where **0** is any asset whose system group has the default display order of "0".

- **Long description:** Additional information describing the system group

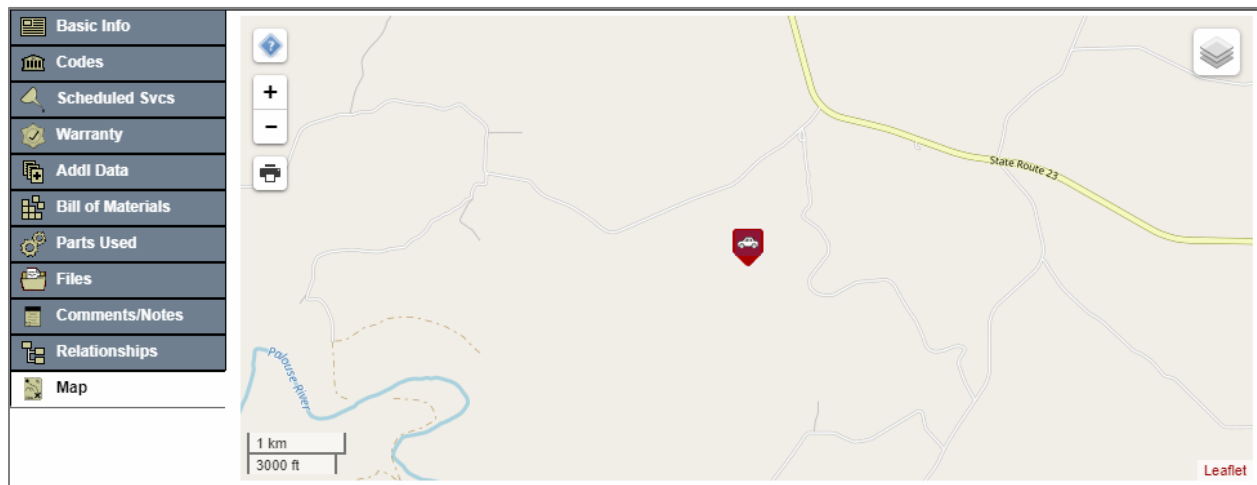
Once system grouping has been defined, you may assign system grouping IDs to assets on the Classes tab of the Asset Definition screens (i.e., Fleet Equipment, Rail Equipment, etc.). Refer to online help for more information.

Fleet Equipment

Search Reload Sort Select Filter Select Sort New Copy Delete

Row #	Equipment ID	Model year	Manufacturer ID	Model ID	Equipment description																								
Basic Info ⚠ Meter Info ⚠ Classes Locations Assignments Accounts Status Capital ⚠ Motor Pool Authorization Comments Equipment ID New equipment unit Classes Equipment class for: Maintenance PM program Standards Rental rates Resources SLA equipment category Benchmarking class type Asset category ID System grouping ID Emergency class ID System grouping ID <table border="1"> <thead> <tr> <th>ID</th> <th>Description</th> </tr> </thead> <tbody> <tr><td>A/C</td><td>A/C</td></tr> <tr><td>AGROUP</td><td>AGROUP</td></tr> <tr><td>APT</td><td>APT</td></tr> <tr><td>ASTOR</td><td>ASTOR</td></tr> <tr><td>AUTOMATIC PUBLIC TOILETS GROUP</td><td>AUTOMATIC PUBLIC TOILETS GROUP</td></tr> <tr><td>BETA</td><td>BETA TEST</td></tr> <tr><td>BGROUP</td><td>BGROUP</td></tr> <tr><td>BRG</td><td>BRG</td></tr> <tr><td>CGROUP</td><td>CGROUP</td></tr> <tr><td>DELTA</td><td>DELTA DESC</td></tr> <tr><td>-----</td><td>-----</td></tr> </tbody> </table>						ID	Description	A/C	A/C	AGROUP	AGROUP	APT	APT	ASTOR	ASTOR	AUTOMATIC PUBLIC TOILETS GROUP	AUTOMATIC PUBLIC TOILETS GROUP	BETA	BETA TEST	BGROUP	BGROUP	BRG	BRG	CGROUP	CGROUP	DELTA	DELTA DESC	-----	-----
ID	Description																												
A/C	A/C																												
AGROUP	AGROUP																												
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DELTA	DELTA DESC																												
-----	-----																												

Map



The map tab only displays if your organization uses maps, and the asset has a location to where it can be shown on a map. For details about using web maps and requirements, refer to the *Mapping Administrator and User Guide*.

5. Access Control Security

The system supports location and department level access control rights. Setting up these control rights allows administrators to choose what assets, locations, etc. that users see when using the system. This security is at the application level and works based on roles set up for individual users and user groups. The following sections give more information on the specific location and department rights information.

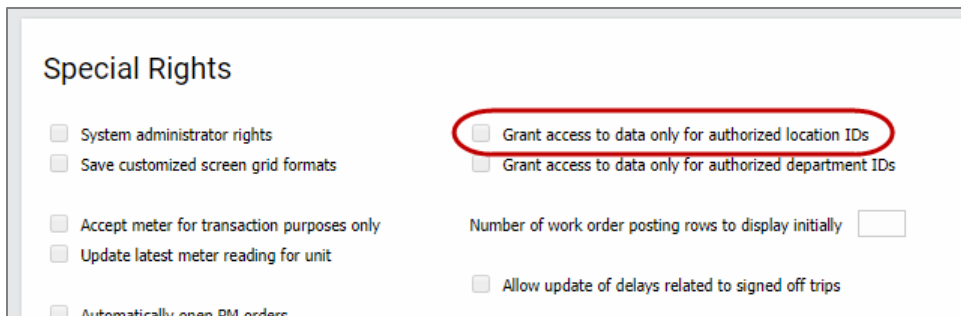
For a list of screens affected by location and department level access control, refer to the *Location-level access control* and *Department-level access control* pages.

Location and Department Access Control Limitations

Location and Department access control can only be applied to Enterprise Portal screens, not to Web portals. Specifying a screen ID in the 7000-8000 range on the Location Access or Department Access screens, and specifying location IDs to enable access will have unintended consequences for users. Access to locations or equipment units in the Web portals, such as the Technician portal, are controlled by a user's Employee configuration, not by the Location or Department Access controls described here.

Location-level Access Control

To enable location-level access control for a user, check the **Grant access to data only for authorized location IDs** option on the User Groups screen, Special Rights tab, for the user groups to which the user is assigned.



The screenshot shows the 'Special Rights' configuration interface. It contains several checkboxes for different permissions. The checkbox labeled 'Grant access to data only for authorized location IDs' is circled in red. Other visible checkboxes include 'System administrator rights', 'Save customized screen grid formats', 'Grant access to data only for authorized department IDs', 'Accept meter for transaction purposes only', 'Update latest meter reading for unit', 'Automatically open PM orders', and 'Allow update of delays related to signed off trips'. There is also a text input field for 'Number of work order posting rows to display initially'.

Location-level access control prevents users from viewing or interacting with any location that they have not been granted access to. To enable access to a location on a specific screen, a user must be assigned to a user group that has a check in either the **View** or **Update** fields on the Location Access screen for the location ID to which the unit is assigned. Location IDs are specified in the **Access rights** field on the Locations tab of the Fleet Equipment screen.

Location Access					
ie	Screen ID	Screen name	Location ID	Name	
	7002	supervisorportal_ascx	%		☒ ☒
	7003	technicianportal_ascx	ACA	ASSET CENTRAL ADMINISTRATION	☐ ☐
	7011	equipmentmanagement_aspx	A%		☒ ☐

Location Access screen **View** and **Update** fields

Locations

Location type

Assigned PM

Assigned repair

Assigned mobile

Station

Stored

Current

Availability

Last fuel

Access rights

Preferred PM shift

Work assignment profile ID

Vehicle location

Building location

Other location data

Last fuel date

Fleet Equipment screen, Locations tab, Access rights field.

Location-level access is applied on Enterprise Portal screens in the following ways:

- Users are unable to view locations they do not have access to via choice-lists.
- Users are unable to filter for records on a screen that have a location they do not have access to on that screen. This applies to any field which contains a location ID.
- Users are unable to save a record with a location ID field if the value in that field is a location they do not have access to on that screen.

Location-level access is also applied to equipment units, using the **Access rights** field on the Locations tab of the Fleet Equipment screen. For screens that have equipment ID fields, location-level access is applied as follows:

- Users are unable to view units assigned to locations that they do not have access to via choice-lists.
- Users are unable to filter for records on a screen that have an equipment ID they do not have access to on that screen. This applies to any field which contains an equipment ID.

- Users are unable to save a record with an equipment ID field, if the value in that field is an equipment unit assigned to a location they do not have access to on that screen.

Department-level Access Control

The system supports department-level access control for data related to equipment units. Access to data for any such object is granted only if there is a check in the **Grant access to data only for authorized department IDs** field, on the Special Rights tab of the User Groups screen, for all user groups to which the user is assigned.

Special Rights

- ☐ System administrator rights
- ☐ Save customized screen grid formats
- ☐ Grant access to data only for authorized location IDs
- ☐ Grant access to data only for authorized department IDs
- ☐ Accept meter for transaction purposes only
- ☐ Update latest meter reading for unit
- Number of work order posting rows to display initially
- ☐ Allow update of delays related to signed off trips
- ☐ Automatically open PM orders

Department-level access control prevent users from viewing or interacting with any department that they have not been granted access to. To enable access to a department on a specific screen, a user must be assigned to a user group that has a check in either the **View** or **Update** fields on the Department Access screen for the department ID.

Department Access

Delete	Screen ID	Screen name	Department ID	Name	View	Update
☐	2024	Fleet Equipment	AB-DEPT-01	AB - FUTURECORP MAIN DIVISION	☒	☒
☐	2024	Fleet Equipment	LAT-DPT-01	LAT-DPT-01	☒	☒

Similarly to Location-level access control, Department-level access control prevents users from viewing departments in choice-lists, filtering for records with these departments, and saving records using these departments.

Likewise, department rights also extend to equipment units that have been assigned, to those departments.