

Version 25



Trapeze

Enterprise Asset Management

Notifications - Messenger

User Guide

Trade Secret | February 2025

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Technical Support

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

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

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

E-mail: cc@trapezegroup.com

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

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

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

Product Compatibility

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

Notifications: Messenger - User Guide

Version 25.x

February 2025

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1. Overview

Just as maintenance and fleet management practices are becoming more active and less passive, software systems are expected to do the same. It is recognized that a static maintenance system no longer meets the needs of most organizations. A system that notifies you and provides timely information is essential for efficient and effective business operation. The Notifications Module is an important first step in addressing this need.

In addition to traditional notifications (outlined in *the Notifications Module Administrator Guide*), the Notifications Module also offers an auditable messaging platform that provides the capability of near-real-time messaging through the portals to increase communication and information sharing between departments.

Requirements

Application 25.x

Web Modules 25.x

MAXQueue 25.x

Assumptions

This guide assumes familiarity with workflows and configuration of the application and MAXQueue.

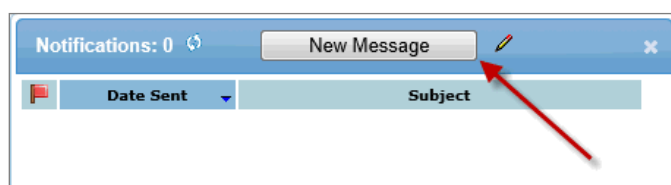
-  Do not use the browser's **Back** button in the Web Modules as unanticipated results may occur.
-  Do not open or use the same instance of the web portals in multiple browser windows or tabs. This can cause errors or unexpected performance issues.

2. Understanding Messenger

This guide provides an overview of the Notifications Messenger. The Messenger is accessed through the Notifications Module's Messages shortcut icon. It enables your agency to communicate directly through the system portals, using an auditable messaging platform and providing the capability of near-real-time messaging. For information on traditional email notifications, please refer to the *Notifications Module Administrator Guide*.

Messenger Setup

For the **New Message** button to display (as shown in the screenshot below) and allow users to send messages, you need to set the screen rights for the user's user group.



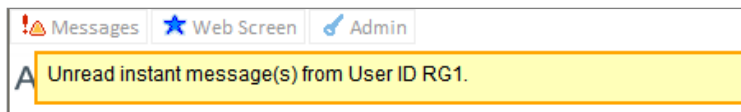
➡ On the Screen Rights screen, set the Send Message screen rights for the User's User Group as desired.

Screen Rights						
Template ID		SYSTEM ADMIN				
Row	Screen ID	Screen name	View	Insert	Update	Copy
316	3000	Screens	X	X	X	X
317	3027	Security - Setup - Options	X	X	X	X
318	2219	Segments	X	X	X	X
319	3015	Send Message	X	X	X	X

When the user accesses the Notifications pop-in, the **New Message** button will display.

Messenger Overview

A pop-up displays when a new message arrives.



To access the messenger:

1. Click the **Messages** shortcut icon.

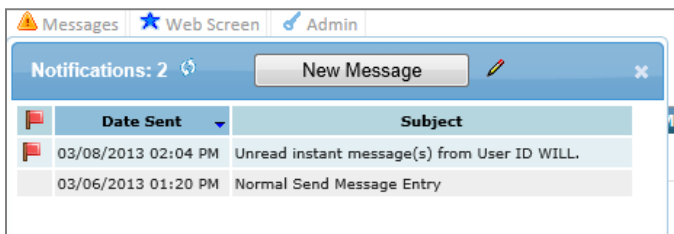


Messages button with no new notifications or messages



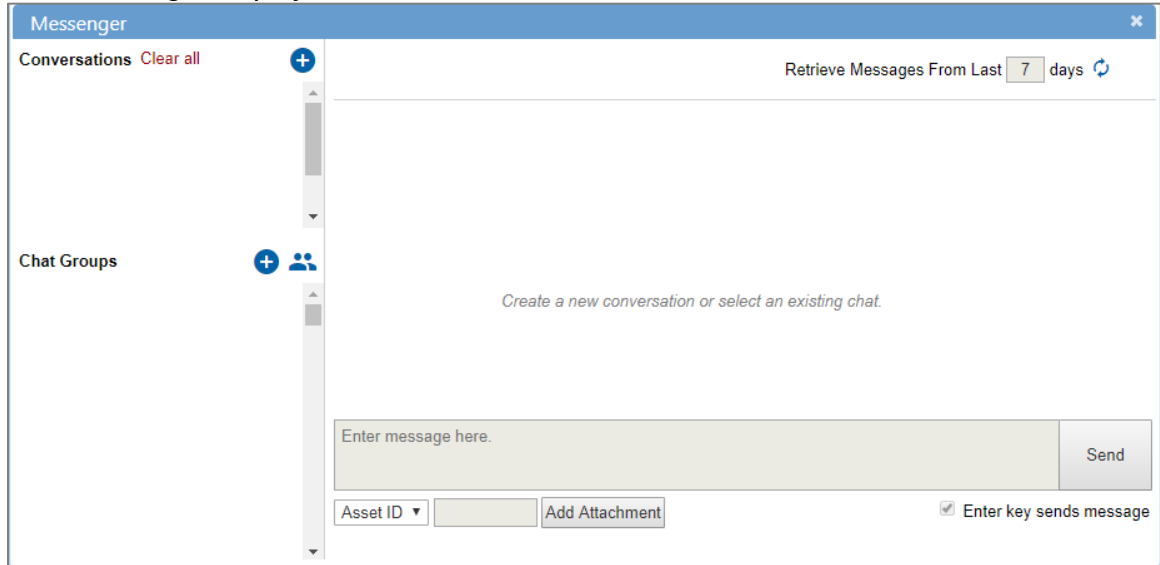
Messages button with a red exclamation point indicates new notifications or messages

The Notifications pop-in displays a list of existing instant messages as well as regular notifications. Please refer to the Notifications Administrator Guide for details about notifications.



2. Click **New Message** or click on the instant message itself to go to the Messenger.

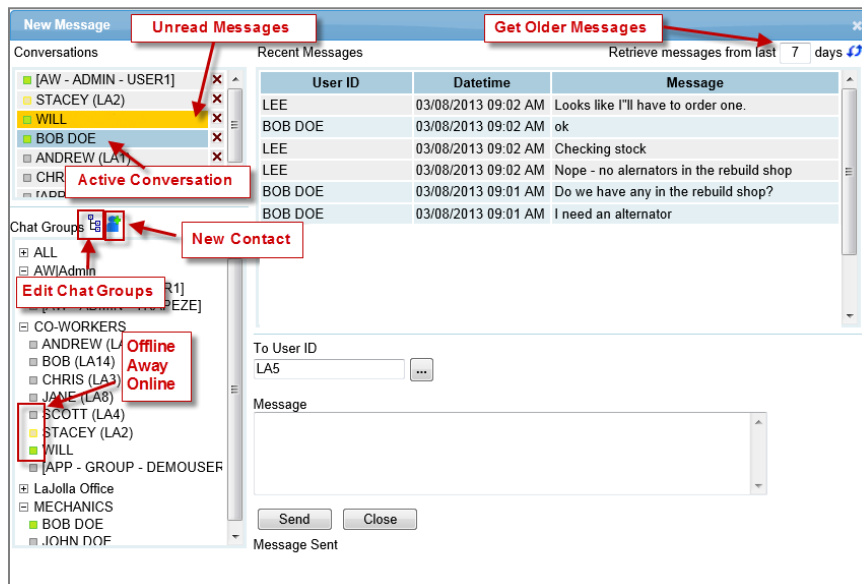
The Messenger displays.



Messenger functionality includes the ability to send messages, add attachments, create and edit chat groups, record messages, and see a history of messages sent and received. Users can communicate with each other and subscribe to each other's chat groups.

Messenger Information

The screenshots, explanations, and steps below provide an overview of the Messenger.



The following color key outlines various statuses of conversations and users:

Color and Format	Description
Orange Highlighted Conversation	Unread Conversation

Color and Format	Description
Blue Highlighted Conversation	Current Conversation
Gray Box	Offline
Yellow Box	Away
Green Box	Online

Messaging Functions

Edit Chat Groups



Use the **Edit Chat Groups** button to manage your Chat Groups.

The 'Edit Chat Groups' dialog box contains the following elements and annotations:

- Public Group Choice-list**: A red box with an arrow pointing to the dropdown menu next to the 'Chat Group Name' field.
- Unsubscribe From Public Group**: A red box with an arrow pointing to the 'X' icon in the 'Delete' column for the 'ALL' group.
- Delete Personal Group**: A red box with an arrow pointing to the 'X' icon in the 'Delete' column for the 'CO-WORKERS' group.
- Remove User From Personal Group**: A red box with an arrow pointing to the 'X' icon in the 'Delete' column for the 'MECHA' group.
- Save Changes** and **Cancel** buttons are at the bottom.

*	Chat Group	Type	Delete
+	ALL	PUBLIC	X
-	AW\Admin	PUBLIC	X
[AW - ADMIN - USER1] [AW - ADMIN - TRAPEZE]			
+	CO-WORKERS	PERSONAL	X
-	LaJolla Office	PERSONAL	X
X	WILL		
+	MECHA		X

New Contact

Use the **New Contact** button to add contacts (as individuals and to groups).

The 'New Contact' dialog box contains the following elements and annotations:

- Add New Contact**: A red box with an arrow pointing to the 'Add New Contact' button.
- Personal Groups**: A red box with an arrow pointing to the 'CO-WORKERS' dropdown menu.
- Save** and **Cancel** buttons are at the bottom.

Fields in the dialog:

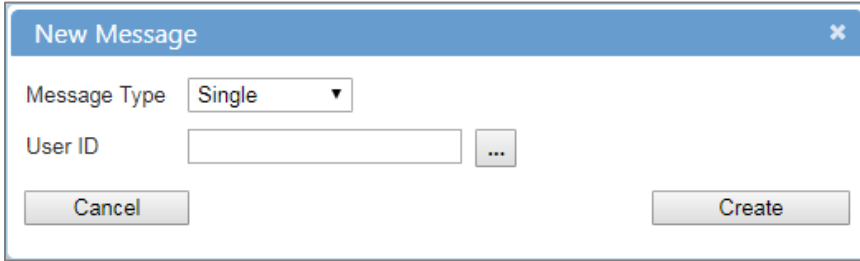
- User ID: USER11
- Nickname: JOE SMITH
- Add to Group: CO-WORKERS

New Conversation

To create a new conversation, do the following:

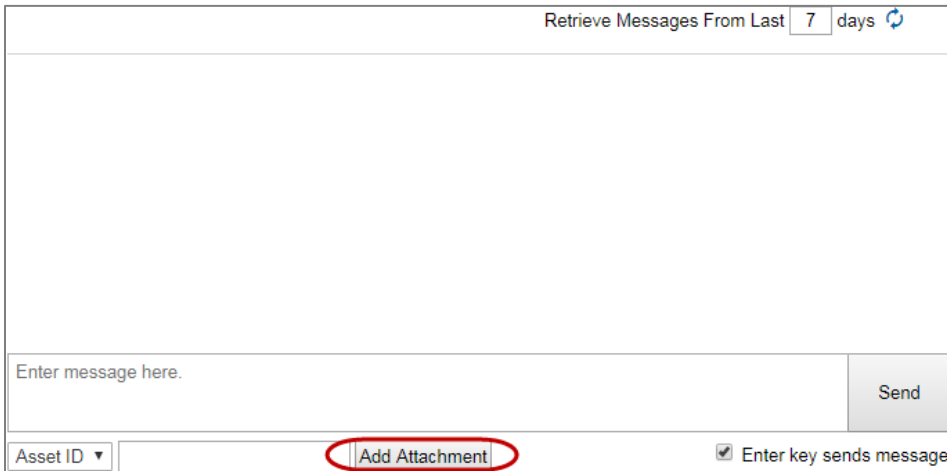
1. Click the  icon in the Conversation section header.

A New Message dialog appears.



The 'New Message' dialog box has a blue header with a close button. It contains a 'Message Type' dropdown menu set to 'Single', a 'User ID' text input field with a three-dot menu icon to its right, and two buttons at the bottom: 'Cancel' and 'Create'.

2. Select the type of message you would like to. For single messages, continue with these steps. For bulk message, refer to following section.
3. Enter a **User ID** or select one from the chooser.
4. Enter a message.
5. To add an attachment, click **Add Attachment**, then select your attachment.



The message composition interface shows a large text area for the message body. At the top right, it says 'Retrieve Messages From Last 7 days' with a refresh icon. Below the text area is a 'Send' button. At the bottom, there is an 'Asset ID' dropdown, an 'Add Attachment' button (circled in red), and a checkbox labeled 'Enter key sends message'.

The attachment shows below the Asset ID field.

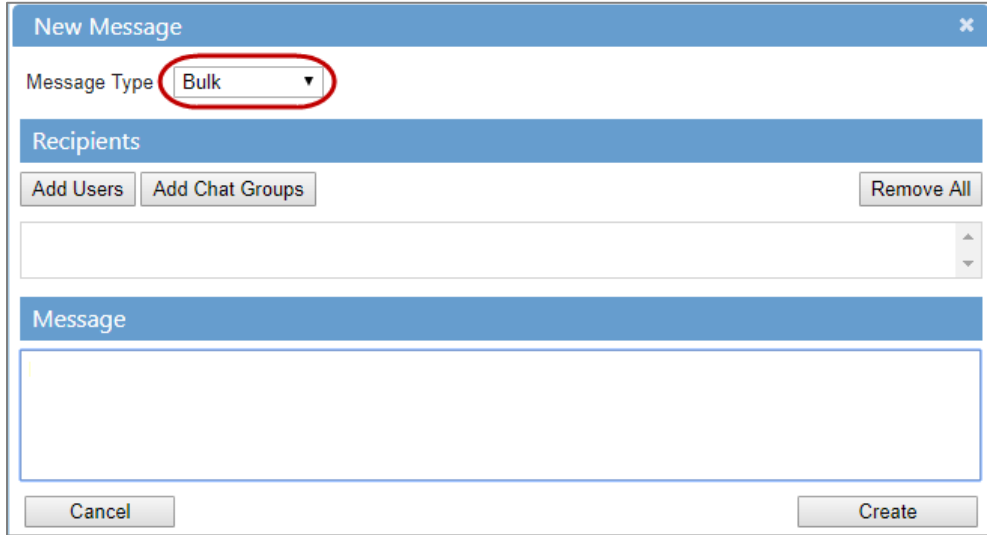
6. Click **Send** to send the message.

In the recipient's Recent Messages section of the Messenger, the message displays with an icon to indicate an attachment.

Recent Messages		Retrieve Messages From Last 7 days	
	From user name	Datetime	Message
	MARY SMITH	05/07/2013 03:38 PM	Beginning work on 7187.

Bulk Messaging

Messages can be sent to a list of users or chat groups using bulk messaging functionality. Selecting the Bulk type from the New Message dialog allows you to select a list of Users and Chat Groups and then generate individual messages to each of the users.



To send a bulk message:

1. Select **Bulk** from the **Message Type** drop-down list.
2. Click **Add Users** or **Add chat Groups** to select who receives the bulk message. The following recipient types may be selected:
 - 1 or more active users
 - 1 or more private chat groups
 - 1 or more public chat groups to which you are subscribed.



For each chat group, the list of users that belong to it are retrieved and the message is sent to each of them.

3. Enter message text in the Message section.
4. Click **Create**.

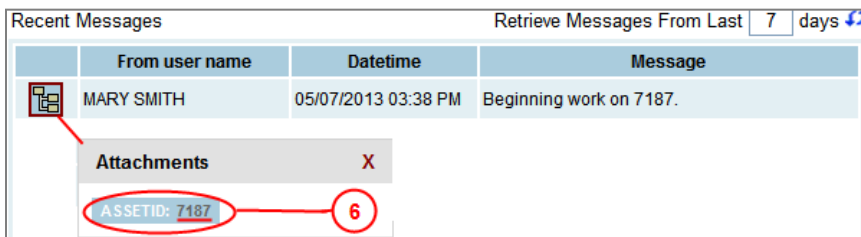
A confirmation dialog will display and allow you to confirm the number of users that will receive messages.

5. Click **Cancel** to stop the process or click **Confirm** to send the message.

Opening an Attachment

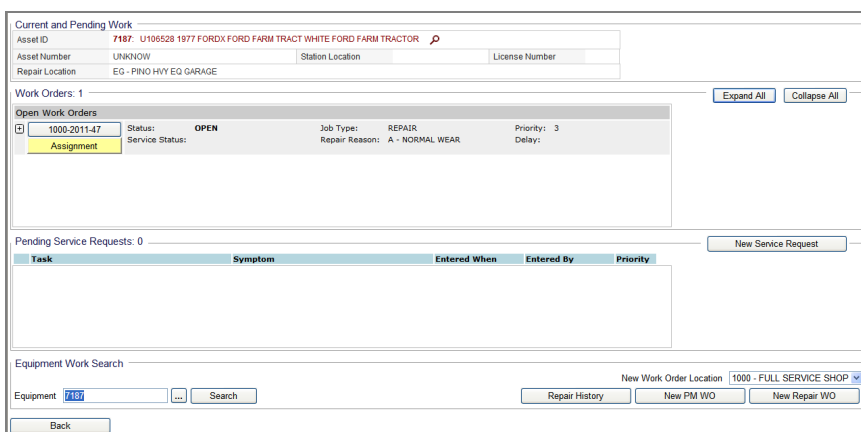
To open an attachment:

1. Click the attachment icon.
2. The attachments link displays.



3. Click the **Attachment** link in the message.

The attachment will open the Equipment Management page in the highest portal you have access to (Work Management, Supervisor, or Technician portal) as displayed below. This page displays the current and pending work for the asset.



Chat Groups

Public chat groups are created by administrators, and personal chat groups are created by users. The Enterprise Portal Chat Groups screen is used by administrators to set up and populate public chat groups such as mechanics or drivers. This screen may be used to add individuals to groups, but the Messenger offers an easy way for users to subscribe to and edit chat groups (as discussed in the [Edit Chat Groups](#) section below).

Once an administrator adds a user to a public chat group, that chat group shows in the user's Messenger Chat Groups list. Users can create and manage their chat groups via Messenger's **Edit Chat Groups** icon as outlined in the next sections. Administrators, please refer to [Appendix A](#) for more information about creating public chat groups.

Editing Chat Groups

To edit chat groups:

1. Click the **Edit Chat Groups** icon .

The Edit Chat Groups pop-in displays.

2. Edit information as needed.
3. When you are done editing, click **Save Changes**.

Creating a Personal Chat Group

To create a new personal chat group:

1. In the messenger, click the edit chat groups icon.
2. Enter a Chat Group Name.
3. Click **New Personal Group**.

The new personal chat group shows in the Users in Groups list as shown below.

Edit Chat Groups

Chat Group Name ...

New Personal Group **Subscribe to Group**

Users in Groups

*	Chat Group	Type	Delete
+	Morning Status	PERSONAL	X

Save Changes **Cancel**

- Since no one has been added to the Personal Chat Group yet, if you click the plus sign + next to the chat group name, nobody will show in the group. Once users have been added to the chat group, click the plus + to display the users in the chat group as shown in the screenshot below.

Edit Chat Groups

Chat Group Name ...

New Personal Group **Subscribe to Group**

Users in Groups

*	Chat Group	Type	Delete
-	Morning Status	PERSONAL	X
X	ANNC		
X	KARL		

Save Changes **Cancel**

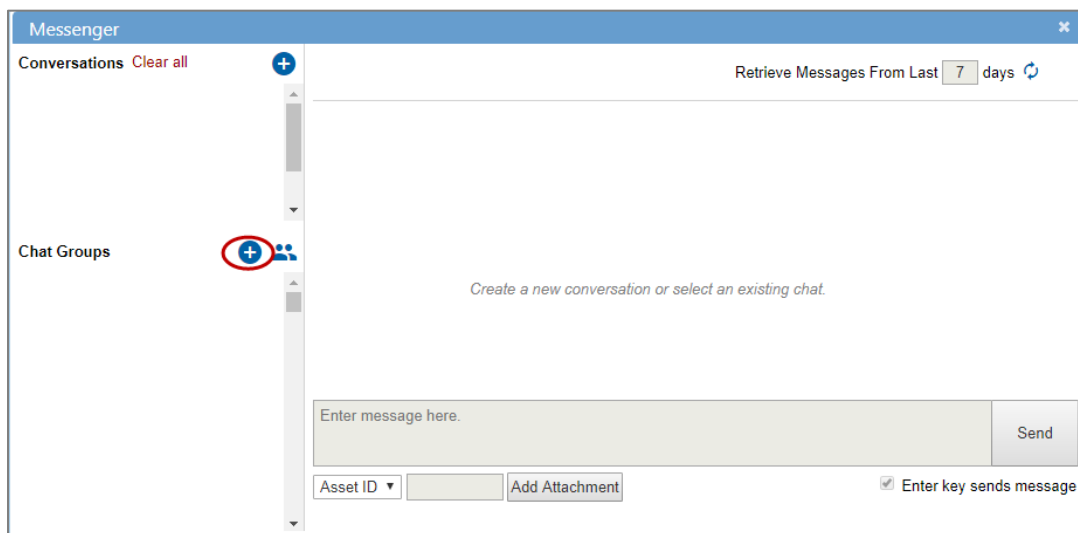
- Click the **X** next to the chat group to delete the chat group.
- To remove a user from the group, click the **X** next to a user.
- Click **Save Changes** to save the chat group.

The new chat group shows in the list.

Adding a Contact to the Group

To add a contact to the group:

- Click the **Add Contact**  icon.



The New Contact pop-in displays.

2. Complete the following fields:

Enter or select a **User ID**

Enter a **Nickname**. This is optional.

Select a group from the **Add to Group** dropdown list.

3. Click **Save** to add the contact to your Chat Group.

The new contact displays in the Chat Group.

Subscribing to a Chat Group

Subscribing to a chat group follows the same flow as creating a new personal group.

To subscribe to a chat group:

1. Enter or select a chat group name.
2. Click the **Subscribe to Group** button.

Edit Chat Groups

Chat Group Name: ... PUBLIC

Users in Groups

*	Chat Group	Type	Delete
+	Morning Status	PERSONAL	✗

The newly subscribed to group displays in the Users in Groups Chat Group list.

3. Click **Save Changes** to save the group.

Edit Chat Groups

Chat Group Name: ...

Users in Groups

*	Chat Group	Type	Delete
+	Morning Status	PERSONAL	✗
+	MECHANICS	PUBLIC	✗

The newly subscribed to group also displays in the Chat Groups list on the Messenger pop-in.

Chat Groups – For Administrators

Administrators use the Enterprise Portal Chat Groups screen to create public groups (such as mechanics or drivers). This screen is also used to add individuals to groups.

The Chat Groups screen allows mixed case group names and group types as well as mixed cased user IDs and nicknames on the Users tab. Please note that since mixed case is allowed, the correct case must be used when filtering on Group Name, Group Type, User ID, and Nickname. The following two examples illustrate the importance of using the correct case.

Example 1: A group name **My Group** exists, entering **MY GROUP** will not return **My Group**. However, **M%** will return the record.

Example 2: User IDs must be entered in the correct case on the Users tab. Since the system supports only capitalized user IDs, administrators setting up a group using this screen need to enter **USER1** not **user1**. Otherwise, you will see a validation that **user1** does not exist. This affects administrators setting up public groups and does not affect users setting up personal groups using the web interface.

Setting up a Public Chat Group, Administrators only

To setup a new public chat group:

1. Click **New**.
2. Complete the **Basic Info** tab by entering a **Name**, **Product** (EAM), and **Group type** (Public).



Note: **Owned by user ID** is only used for personal chat groups.

3. Complete the **User Groups** tab information by selecting a **User Group ID**, and selecting **Subscribe to group** or **Include in group**.
 - **Subscribe to group:** Everyone in the group is automatically subscribed to the group.
 - **Include in group:** Puts all the users inside the group.
4. Click the **Save** button.

*Now, when you click the **New Message** button (Notifications), the Messenger dialog opens and shows the newly added Public Chat Group.*

