Version 25 | Trapeze Enterprise Asset Management

Service Request

Administrator Guide

Trade Secret | February 2025

Technical Support

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

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

Toll-Free Telephone:	1-877-411-8727
E-mail:	cc@trapezegroup.com
FTP Site:	https://ftps.trapezegroup.com/
Web Site:	https://collaborate.trapezegroup.com

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

Product Compatibility

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

Service Request - Administrator Guide

Version 25.x

February 2025

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1. Overview

The Service Request Portal is designed as an easy to use, browser-based interface for deploying Service Request entry and display to any user in your organization. This portal is easy to deploy and provides your organization with the option to relieve the burden on shops or call centers that record requests from employees and operators for asset maintenance or vehicle service by allowing individuals to log the requests themselves. Using the kiosk feature eliminates the need for each operator to have a login for entering and displaying vehicle service requests through the Web Modules interface.

Requirements

Application 25.x

Web Modules 25.x

Assumptions

Familiarity with system workflow and configuration.

Do not use this module in a shared tab with another module (such as Storekeeper, Technician, etc.) as it could cause unexpected behavior. This module must be set on its own tab for proper functionality. For more information, refer to the *Administrator Guide Section 2. Web Modules Configuration, Adding Modules and Tabs*.

User defined required fields that do not appear in Web Modules will return validation messages.

Do not use the browser's **Back** button in the Web Modules as unanticipated results may occur.

Do not open or use the same instance of the web portals in multiple browser windows or tabs. This can cause errors or unexpected performance issues.

2. Install or Upgrade the Service Request Portal

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

3. Add a Service Request Tab to Web Modules

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

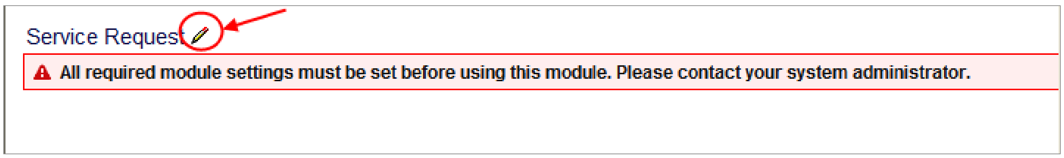
Please refer to the *Administrator Guide, Web Modules Configuration – Adding Modules and Tabs* section for detailed instructions on adding new tabs and configuring security access for those tabs.

The Service Request Portal supports anonymous access to all users. Therefore, a default user may be configured to serve as the background user for any number of anonymous end users. This configuration is allowed to support kiosk deployments of the portal's functionality.

4. Module Settings and Configuration

Follow the steps below to configure the Service Request Portal.

1. While logged into Web Modules as an Administrator, click on the Service Request portal tab.
2. Click the pencil icon next to the portal title bar to edit the Service Request settings.



3. On the Service Request Settings screen, you may configure the portal according to your organization's utilization. Continue to configure this module for first time use.

Refer to the Security Information, Default Values, Portal-wide Options, and Report a Problem Page Options sections below for instructions on configuring the portal.

Configuring the Service Request Module

Before the portal has been configured, users may receive the above error message.

Example: under the Service Request Portal Settings, if no ***Asset Types*** are selected, then the message will display, prompting the need to re-configure the portal settings.

To resolve this issue:

1. Login to the Web Modules as an administrative user.
2. Open the Service Request portal.
3. Click the pencil icon.
4. Under the **Asset Types** section, select either of the checkboxes for the list of types under Authenticated User or Unauthenticated User for an Asset Type
5. See more details in the Options setup below

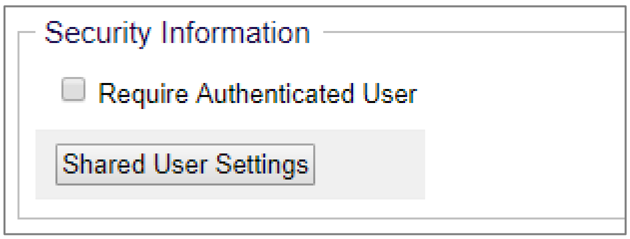
To ensure that users are able to access the module properly after an upgrade, review all settings listed below for this version after upgrading.

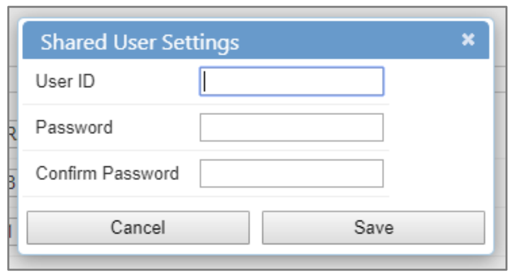
Security Information

The Security Information section of the Service Request Settings screen is where you determine whether service request portal users will be authenticated or not.

Authenticated User versus Shared User

The Service Request portal default setting for **Require Authenticated User** is checked. When this option is selected, all users are required to log in to Web Modules with their User ID prior to entering a new service request.





When **Require Authenticated User** is unchecked, **Shared User Settings** button displays. Shared User Settings allow for customizing screen and control rights based on the shared user's user group and rights templates. For example, use Shared User Settings if you do not need to associate a User ID with each service request or if you want to configure the system to allow anonymous entries of service requests.

Shared User Settings fields are **not** validated.

To use shared user settings, enter a default **User ID** and **Password** and confirm the password by entering the same password in the **Confirm Password** field. This could be a User ID set up specifically for entering Service Requests through Web Modules. A reason for choosing this set up would be to allow users who do not have User IDs to enter service requests through a kiosk or standard intranet page.

The **Confirm Password** textbox validates the passwords entered in the **Password** and **Confirm Password** textboxes are the same. The validation is client side and IS case sensitive. The User/Password is not tested against the system until you after you successfully save the settings, logout, and then try to access the module (tab) while not logged in. If you get kicked back to the login form, you entered the wrong password. Additionally, for security reasons, it is necessary to re-enter the shared user's password every time the settings are saved, otherwise the password is cleared and will not allow unauthenticated users to access the module.

To confirm that shared user settings work, create a service request while not logged into Web modules by doing the following:

Make the tab containing Service Request portal visible to unauthenticated users and disable the module setting "Require Authenticated User" to allow people to submit service requests who do not have EAM log ins.

There are two primary ways to allow these users to access this portal:

1. Via the Log In page menu
    - Users may click the menu icon in the top-left corner to view tabs that are available to unauthenticated users. Service Request portal will display and can be accessed here.
2. Via the Log In page Quick Links
    - You can add the URL to the tab containing Service Request module as a quick link on the Home tab to allow easy access to it for anonymous users.
        a. Open the menu on the log in page, right click on the Service Request link, and select “Copy Link”.
        b. Sign into Web Modules.
        c. If there is not one already, add a Quick Links module to your Home tab.
            i. Go to Admin → Admin Center.
            ii. Select the Home tab in the Tabs ListBox. Click the edit pencil.
            iii. Select QuickLinks in the Module Type dropdown.
            iv. Enter a name in the Module Name field.
                - This is the title that will show at the top of it on the Log In page. You may want to pick a context-appropriate name like “EAM Services” instead of the default “Quick Links”.
            v. Click the “Add to ‘Organize Modules’ Below” button.
                - Optionally select the module in the “Content Pane” ListBox and click the left arrow to move it to the left mini page.
            vi. Click the Save button.
            vii. Click the Home tab in the website banner.

d. Click the (+) icon in the Quick Links module and add a new URL link.

ii. Give the link a good title like “Create Service Request”.

iii. Paste the URL you copied to your clipboard (e.x. https://host/IISSiteName/Default.aspx?tabid=X) into the URL textbox.

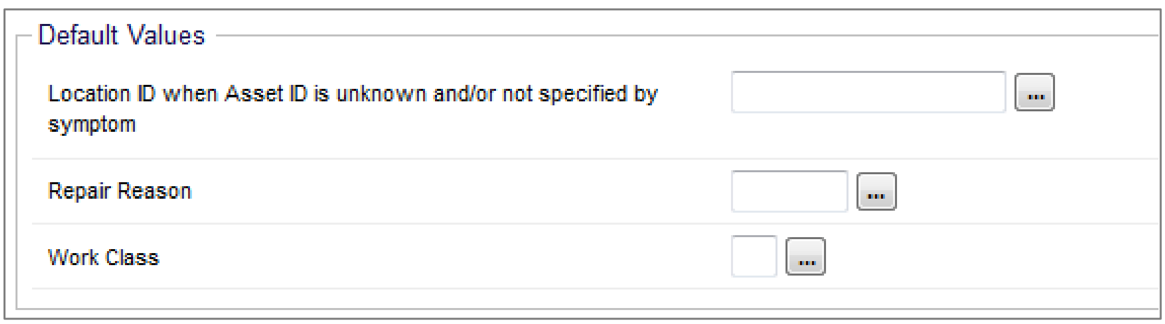
iv. Save.

e. The Quick Link will now be available on the log-in page.

Notes:

1. As of version 24.1.0, the URL to the tab containing Service Request module cannot be directly accessed via URL. It will result in a message shown to the user that module settings are not configured.
2. Tab IDs are unique. If a new tab is made with Service Request portal in it and you want users to access that one instead, you will need to do the above process for the new tab.

Default Values



The Default Values section is where you define values that may be required to create service requests, but are not available as fields for user input. Note that not all of these default values are required for the portal to work. Default value requirements depend on your organization’s setup.

Location ID when Asset ID is unknown and/or not specific by symptom

When an Asset ID is unknown and/or not specific by symptom, Location ID is a required field. Enter a valid Location ID in this field to define the default Location ID for times when the Asset ID is unknown and/or not specific by symptom.

It is **highly recommended** that organizations define a default location, otherwise users may receive an error message stating that **Location is required** when there is no place to enter Location ID manually.

Repair Reason

Repair Reason is not a required field. However, if used, it must be entered as a valid Repair Reason in this field for users to correctly create Service Requests through Web Modules. To allow for tracking of Service Requests that were created through Web Modules, it is recommended that you use a valid Repair Reason that indicates the Service Request was created through Web Modules (e.g., Customer Reported or Web Modules).

Work Class

Work Class is not an out-of-the-box required field, but your installation of may be configured to require this field (as set on the Work Orders – Options tab by following the path: Setup → Organization Structure → Locations → Primary Information). If entered, the Work Class must be a valid Work Class.

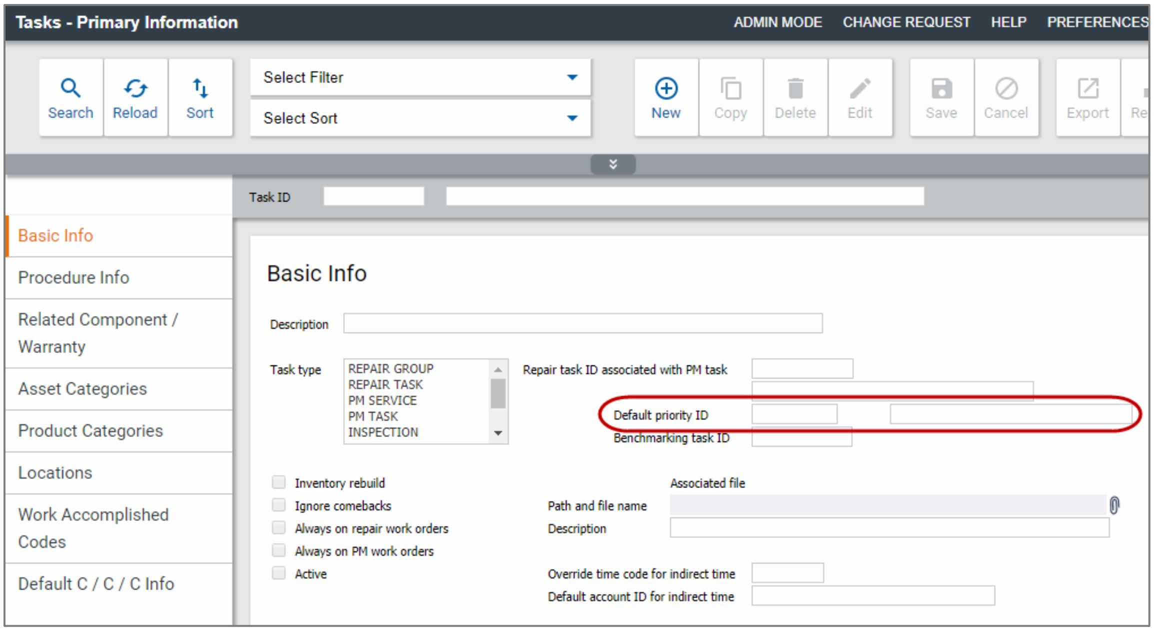
Default Priority for New Service Requests

The default priority for new service requests may be set at the Task ID level (and optionally the Task ID/Asset Category) or the Symptom level (and optionally the Symptom/Asset Category). The Tasks - Primary Information screen has a **Default Priority ID** field. On the Tasks - Primary Information screen's Asset Categories tab, each Asset Category has a **Default Priority ID** field. When a new service request is added with a Task ID, the system checks the Task/Asset Category level, then the Symptom level, and then the Equipment level to find a default Priority ID. If both task and symptom are present, task takes priority.

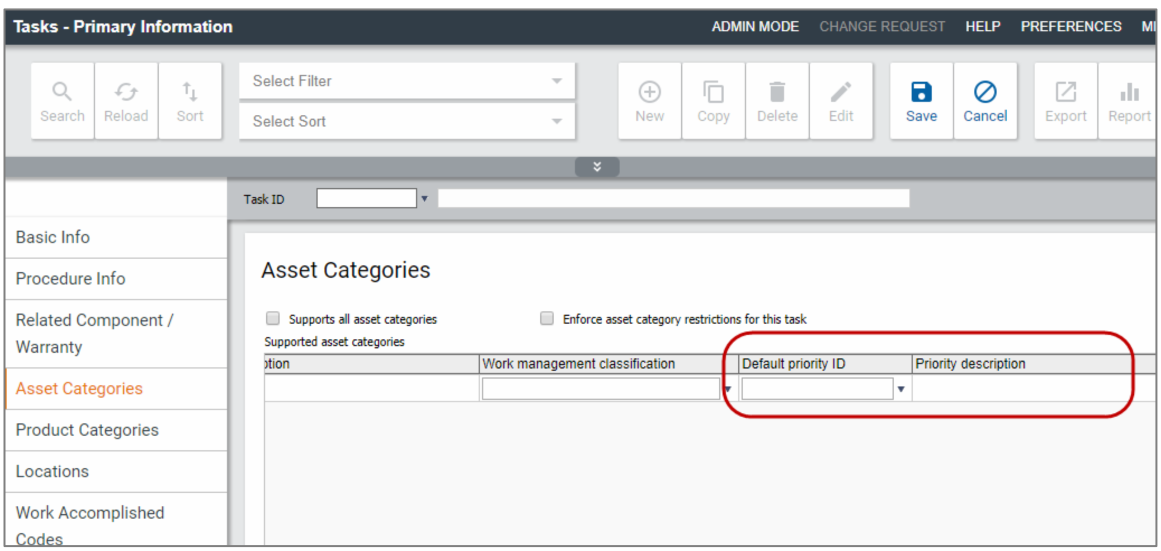
The defaulting hierarchy for service request priority is as follows:

1. Task/EQ Asset Category Priority (DES_ACAT)
2. Task Default Priority (DES_MAIN)
3. Symptom/EQ Asset Category Priority (SYMP_ACAT)
4. Symptom Default Priority (SYMP_MAIN)
5. Equipment Default Priority (EQ_MAIN)

   The system uses the first priority found.



Default Priority ID for Task



Default Priority ID for Asset Category

Portal-wide Options

The Portal-wide Options section is where you set the date/time format and the option for mobile friendly UI for the portal.

Date/Time Values in 24 hour or 12 hour Format: Select the value for 12 or 24 hour format from the drop-down selection box. The default value is 24-hour format.

Use mobile-friendly UI: Check this box to enable the option for creating service requests in a mobile-friendly environment. When this option is enabled, the tab for that module will use the mobile-friendly UI for any device that uses that tab, regardless of accessing it from a computer or a mobile device. If your organization requires the Service Request module to have both types of UI available, set up two Service Request tabs; one with standard UI, and one with this option enabled for mobile-friendly UI. Refer to the *Service Request User Guide, Understanding the Portal* section for the variations between the standard UI, and mobile-friendly UI.

Report a Problem Page Options

The Report a Problem Page Options section consists of four parts (Header Options, Step 1 Options, Step 2 Options, and Step 3 Options) that correspond to specific areas on the Report a Problem page. Header is the main title and subtitle for the page. Steps 1-3 correspond to identifying the following:

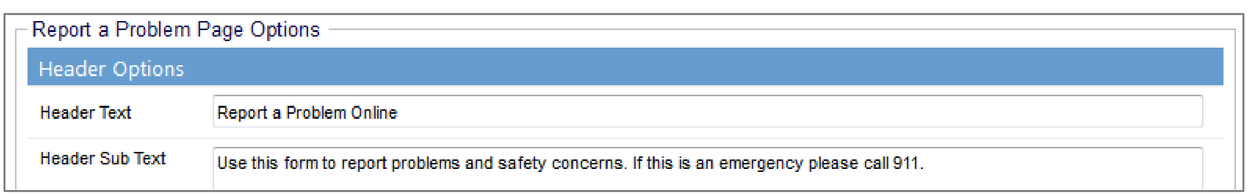
- WHO is reporting the problem
- WHERE the problem is located
- WHAT problem exists

Please note that most options are required and will restore to the default value if saved with a blank value.

The four Report a Problem Page Options are outlined below with screenshots of the corresponding area on the Report a Problem page.

Header Options

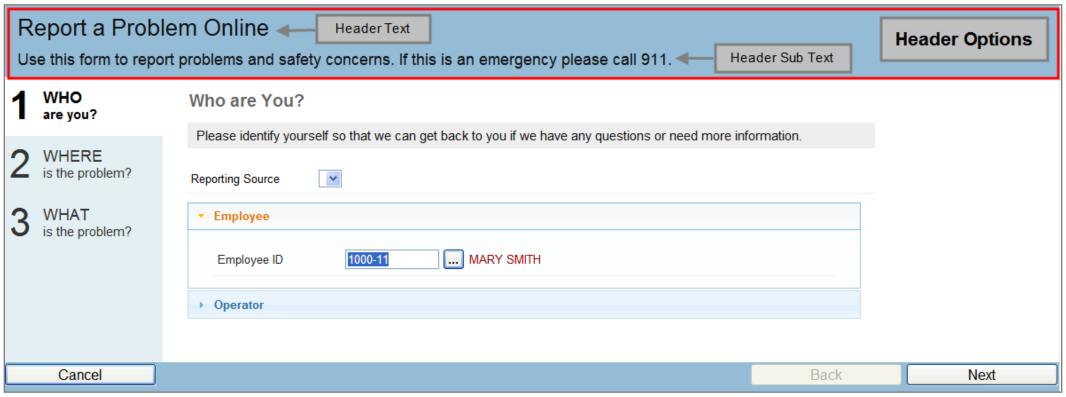
The **Header Options** section is where you configure the **Header Text** and **Header Sub Text** for the Report a Problem page. Enter text for the header and sub header (or leave default).



Default values for Header Options include the following:

- **Header Text:** Report a Problem Online
- **Header Sub Text:** Use this form to report problems and safety concerns. If this is an emergency please call 911.

  The corresponding Report a Problem page Header Text and Header Sub Text show in the screenshot below.



Step 1 Options

The **Step 1 Options** section is where you configure the Report a Problem page for the first step of the process – identifying WHO is reporting the problem.

The default values for Step 1 Options include the following:

- **Step 1 Tab Code:** 1
- **Step 1 Tab Text:** WHO
- **Step 1 Tab Subtext:** are you?
- **Step 1 Header Text:** Who are You?
- **Step 1 Header Instructions Text:** Please identify yourself so that we can get back to you if we have any questions or need more information.
- **Show Reporting Source:**
  - For Authenticated Users - unchecked
  - For Unauthenticated Users - unchecked
- **Default Reporting Source:** blank
- **Display Jurisdiction**
  - **For Authenticated Users:** Check this option to show the Jurisdiction field for authenticated users
  - **For Unauthenticated Users:** Check this option to show the Jurisdiction field for unauthenticated users
- **Jurisdiction List Type ID:** Select the list type ID for the correct list of jurisdiction choices (created on the Custom List Values screen).
- **Types of WHO:**
  - **Employee**

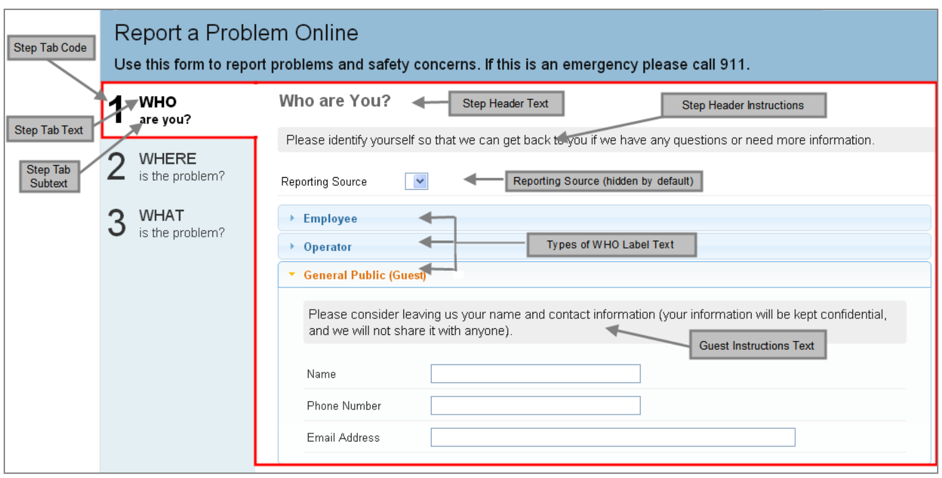
- Label text = Employee
- Show to Authenticated Users: checked
- Show to Unauthenticated Users: unchecked

- **Operator**
  - Label text = Operator
  - Show to Authenticated Users: checked
  - Show to Unauthenticated Users: unchecked

- **Guest**
  - Label text = General Public (Guest)
  - Show to Authenticated Users: unchecked
  - Show to Unauthenticated Users: checked

- Guest instructions text
  - Please consider leaving us your name and contact information (your information will be kept confidential, and we will not share it with anyone).

The corresponding Report a Problem page Step 1 text and selection options show in the screenshot below.



Steps 2 and 3 use the same process to define the Step Tab Code, Text, Subtext, Header, and Header Instructions.

Step 2 Options

The **Step 2 Options** section is where you configure the Report a Problem page for the second step of the process – identifying WHERE the problem is located.

The Service Request history list will display based on the settings configured.

The default values for Step 2 Options include:

- **Step 2 Tab Code:** 2
- **Step 2 Tab Text:** WHERE
- **Step 2 Tab Subtext:** is the problem?
- **Step 2 Header Text:** Where is the problem?
- **Step 2 Header Instructions Text:** Please identify where the problem is and what asset or piece of equipment it affects.
- **Allow Enter/Search for Asset ID**
    - **For Authenticated Users:** checked
    - **For Unauthenticated Users:** checked
    - **Asset ID lookup instructions:** Option A: Enter the Asset ID or search for one.
    - **Use Asset Chooser Instead of Choice-list**
        - For Authenticated Users: checked
        - For Unauthenticated Users: checked
    - **Use Symptom Chooser Instead of Choice-list**
        - For Authenticated Users: checked
        - For Unauthenticated Users: checked
    - **Display Asset Viewer On Asset Information**
        - For Authenticated Users: checked
    - **Supported Asset Categories:** Select one or more options to be added to allow the user to filter what assets are selectable.
        - **Add Asset Category(ies):** Select one or more categories to add to the filter list.
        - **Remove Asset Category(ies):** Select one of more of the current categories to remove.
    - **Asset Type**
        - Authenticated User: Checked

ASSET	BOUNDARY
ELECTRICAL	EQUIPMENT

FACILITY	FORESTRY
LINEAR	OTHER
PIPELINE	POWER
RAIL	RAIL CAR
ROAD	SIGN
SIGNAL	STATIONARY
STRUCTURE	TRACK
VEHICLE	

- Unauthenticated User: Checked

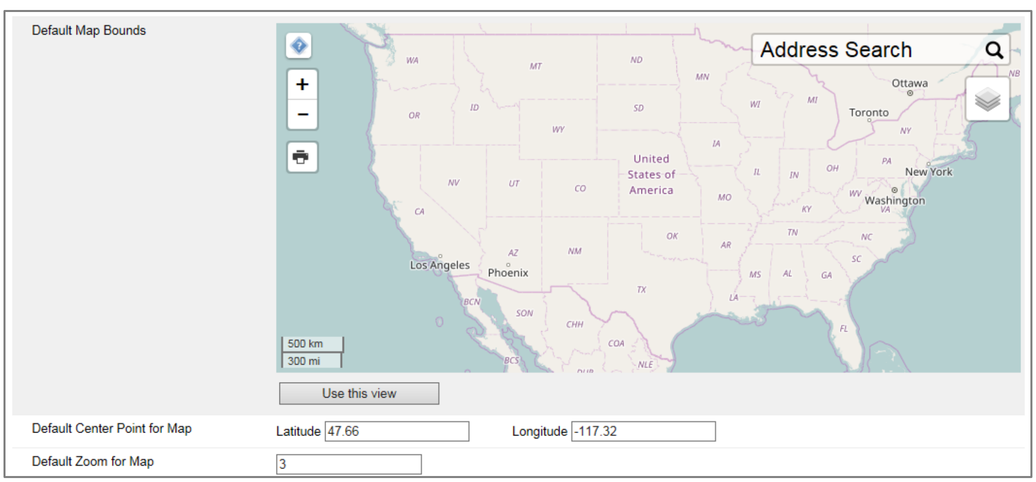
  ASSET

- **Show Recent Requests for Service**
  - For Authenticated Users: checked
  - For Unauthenticated Users: checked
- **Maximum Requests to Show (Blank for ALL):** 10
- **Include Requests with Status**
  - For Authenticated Users: OPEN / PENDING checked
  - For Unauthenticated Users: OPEN / PENDING checked

- **Use slider for linear reference offsets:** checked
- **Allow Describe Asset**
  - **For Authenticated Users:** checked
  - **For Unauthenticated Users:** checked
  - **Asset description instructions:** Option B: If Asset ID is unknown or uncertain, please describe the asset to the best of your ability.
  - **Allow Entry of Asset Type and Category:**
    - For Authenticated Users: checked
    - For Unauthenticated Users: checked
  - **Asset Type Label Text: Asset Type**
  - **Asset Category Label Text: Asset Category**
  - **Allow Entry of Asset Address (Location):**

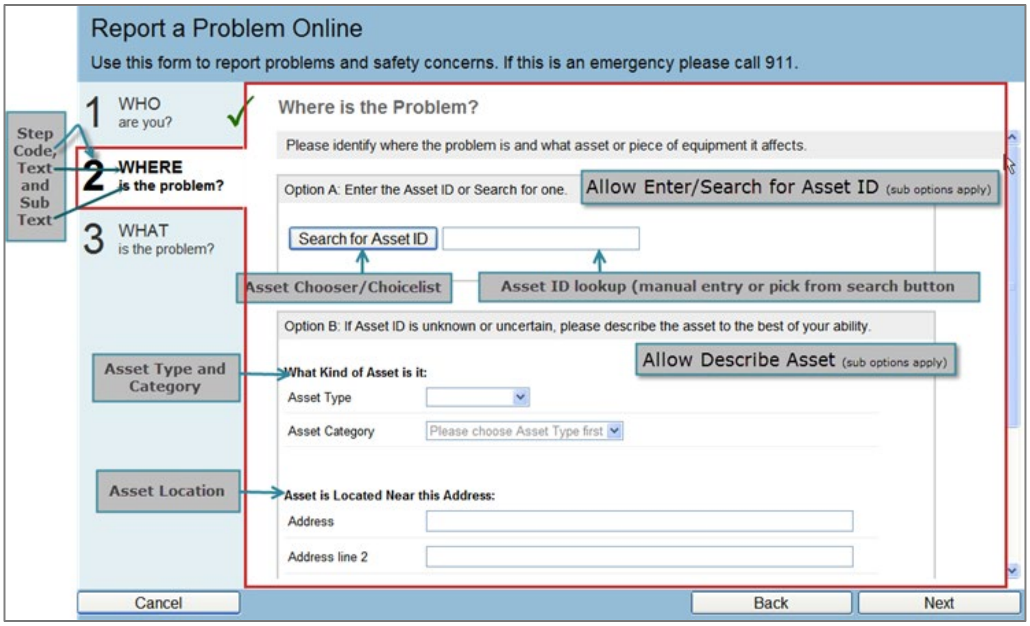
  - For Authenticated Users: checked
  - For Unauthenticated Users: checked

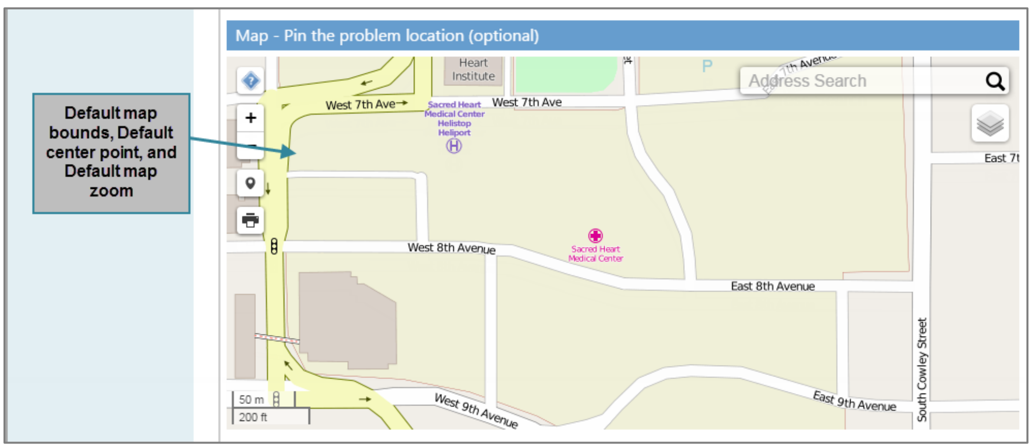
- **Address Line 1 Label Text:** Address
- **Address Line 2 Label Text:** Address line 2
- **Address Line 3 Label Text:** City
- **Address Line 4 Label Text:** State/Province
- **Allow Entry of Asset Description:**
  - For Authenticated Users: checked
  - For Unauthenticated Users: checked
- **Asset Description Label Text:** Describe the asset or equipment (please be specific)
- **Asset Description Examples:**
  - Green fire hydrant at corner of 7th and Oak St
  - Drinking fountain near elevator on 3rd floor of Administration Building
  - Front bicycle rack on City Bus #4505
- **Allow users to pin problem location on map**
  - For Authenticated Users: checked
  - For Unauthenticated Users: checked
- **Default Map Bounds:** Move the map and click **Use this view** to set the default map bounds.



- **Default Center Point for Map:** You can also set the default map view with latitude and longitude coordinates.

- **Default Zoom for Map:** Defaulted to 17





Step 3 Options

The **Step 3 Options** section is where you configure the Report a Problem page for the third step of the process – identifying WHAT the problem is.

Default values for Step 3 Options include:

- **Step 3 tab code:** 3
- **Step 3 tab text:** WHAT
- **Step 3 Tab Subtext:** is the problem?
- **Step 3 Header Text:** What is the Problem?

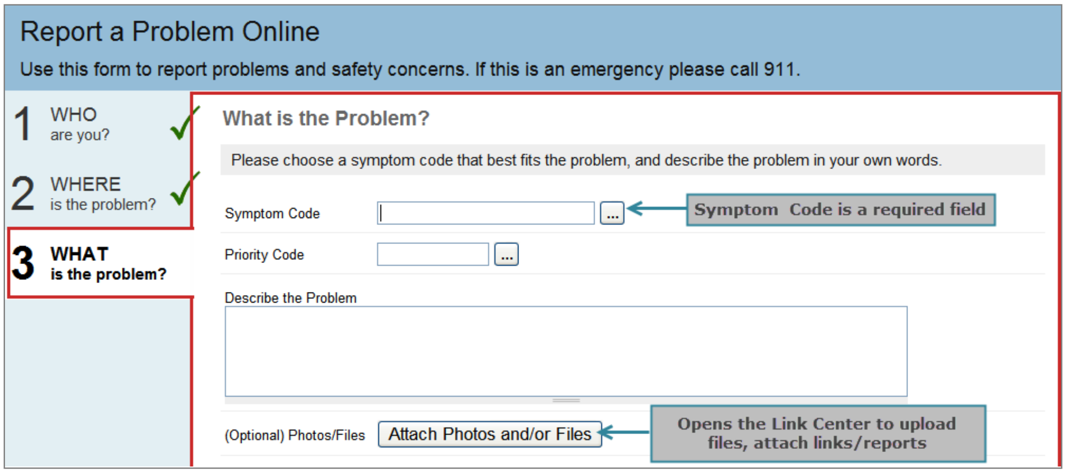
- **Step 3 Header Instructions Text:** Please choose a symptom code that best fits the problem, and describe the problem in your own words.
- **Symptom Code Label Text:** Symptom Code

  Note: Symptom Code is a required field. Location code is also required, but will either default based on the symptom or from the settings page. It is highly recommended for organizations to define a default location. Otherwise, the user may receive a misleading error message stating that “location is required” but there is no place to enter location ID manually.

- **Default Priority:** blank

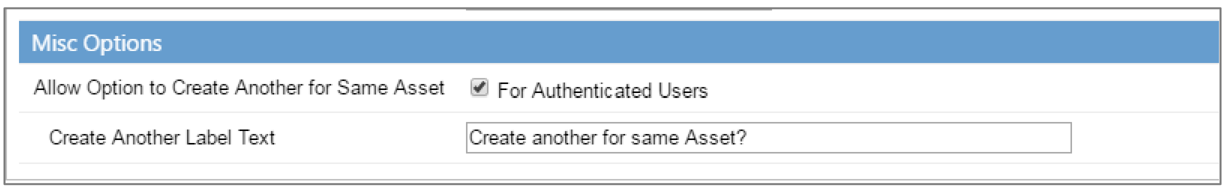
  Note: Priority Code is optional. Priority Code is a legacy setting. The default serves as a visual cue to the user that “something” can be entered in this field. However, it is recommended that Priority Code be hidden and defaulted (via Symptom) instead of allowing users to enter their own priority codes. There is currently no way to restrict the list of priority codes that are shown in the choice-list. If this is a problem, use user interface (UI) rights to hide the choice-list, or simply use portal settings to hide the entire Priority Code field.

- **Allow Entry of Priority:**
  - For Authenticated Users: checked
  - For Unauthenticated Users: checked
- **Priority Label Text: Priority Code**
- **Describe the Problem Label Text:** Describe the Problem
- **Allow Uploads of Photos and Files**
  - For Authenticated Users: checked
  - For Unauthenticated Users: checked
- **Photo/File Upload Label Text**
  - (Optional) Photos/Files
- **Photo/File Upload Button Text**
  - Attach Photos and/or Files



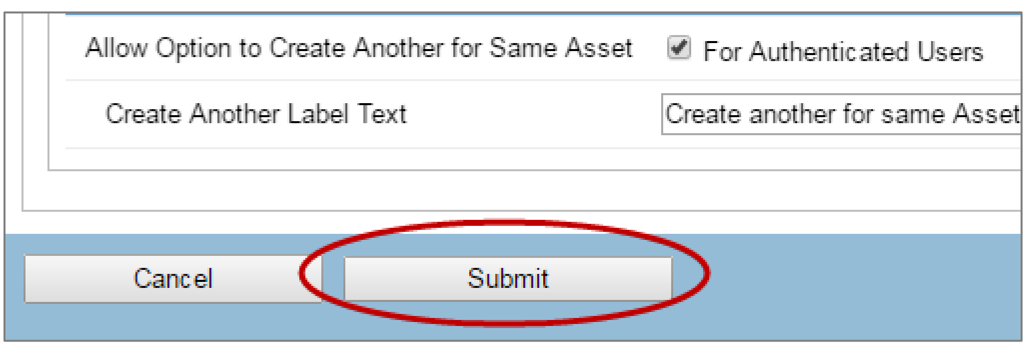
After entering all values to configure the Service Request portal, click the **Submit** button at the bottom of the Service Request Settings page.

Miscellaneous Options

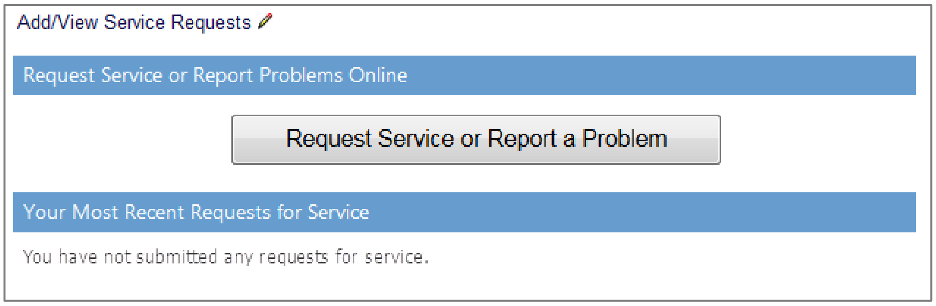


- **Allow Option to Create Another for Same Asset**
  - For Authenticated Users: checked
- **Create Another Label Text:** Defaults as Create another for same Asset?

When you are done entering information, click **Submit**.



The values are stored and automatically populate the appropriate fields when a user creates a Service Request. The Service Request Portal displays.


Add/View Service Requests
Request Service or Report Problems Online
Request Service or Report a Problem
Your Most Recent Requests for Service
You have not submitted any requests for service.

5. Finishing

After you have configured the Service Request Portal, be sure to exit your browser and open a new browser window prior to using the Service Request tab to enter Service Requests.

You have now successfully installed and configured the Service Request Portal. Please refer to the *Service Request User Guide* for information about how to navigate the Service Request portal to enter and view the status of requests for maintenance to assets (vehicles, busses, rooms, etc.) without having to email or phone the maintenance department.