

Version 25



Trapeze

Enterprise Asset Management

Service Request

User Guide

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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://ftp.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 Requests - User Guide

Version 25.x

February 2025

Contents

1. Overview.....	1
Requirements.....	1
Assumptions	1
2. Understanding the Portal	2
Request Service or Report a Problem.....	2
Non-Mobile UI Request and Report Process	3
Request Service or Report a Problem (mobile-friendly UI)	15
Mobile UI Request and Report Process.....	15

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 the system workflow and configuration.

-  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. Understanding the Portal

The aim of a service request is to provide asset users (equipment drivers and operators, administrative personnel, employees, etc.) a means 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. The following sections outline how to use the portal.

Request Service or Report a Problem



Note: The fields that display may be different than those noted below as the options showing may have been configured differently. Refer to the *Service Request Administrator Guide* for more information.



If you are logged in as a specific user (not using shared user login), the front page displays your most recent requests for service. The statuses and number of results to display (maximum 50) can be configured in the portal options. If you are accessing the portal using a shared login, you are taken directly to the Report a Problem page instead.

Reporting a problem involves completing the Report a Problem form which consists of three steps. The three steps are presented as the following questions (by default):

1. Who are you?
2. Where is the problem? (What asset or what location/address)
3. What is the problem?

The sections below provide an overview to understand how to complete each step's form to submit a request for service. Form fields will vary based on configuration.



Note: To see the service request process with the mobile-friendly UI look, refer to the [Request Service or Report a Problem \(mobile-friendly UI\)](#) section.

Non-Mobile UI Request and Report Process

To start a service request or report a problem:

➡ Click the Request Service or Report a Problem button.

Date Reported	Asset ID	Problem Code	Problem Description	ID	Status
05/17/2017 15:07	SRV-CAR03 - 2017 JEEP GRAND CHEROKEE JEEP GRAND CHEROKEE LIMITED	SRV-TIRES01 - SRV TIRE SYMPTOM		SRV-CAR03-2941455	Open
05/17/2017 14:52	SRV-CAR03 - 2017 JEEP GRAND CHEROKEE JEEP GRAND CHEROKEE LIMITED	QA-SYMP-CRACK - QA SYMPTOM FOR CRACK	3C TASK GENERATED	SRV-CAR03-2941453	Open
03/22/2017 07:29	SRV-CAR02 - 1997 CHEVROLET BLAZER WORKING CHEVY BLAZER	QA-SYMP-CRACK - QA SYMPTOM FOR CRACK	3C TASK GENERATED	SRV-CAR02-2941004	Open
03/21/2017 11:05	SRV-CAR01 - 2006 JEEP GRAND CHEROKEE JEEP GRAND CHEROKEE	QA-SYMP-CRACK - QA SYMPTOM FOR CRACK	3C TASK GENERATED	SRV-CAR01-2941000	Open
02/09/2017 13:41	SRV-CAR02 - 1997 CHEVROLET BLAZER WORKING CHEVY BLAZER	B02-00 - OIL LEVEL		SRV-CAR02-2939988	Fixed

The Report a Problem Online page (**Step 1: WHO are you?**) displays.

WHO are you?

Report a Problem Online

Use this form to report problems and safety concerns. If this is an emergency please call 911.

1 WHO are you?

Who are You?

Please identify yourself so that we can get back to you if we have any questions or need more information.

Reporting Source: MCC - MAINTENANCE CONTROL CENTER

Employee

Employee ID: SYSADMIN ... SYSADMIN

Name: SYSADMIN

Phone Number: (509) 999 - 9999

Email Address: sysadmin-emp@mytransit.com

Operator

General Public (Guest)

Numeric Attribute:

Date Attribute:

Text Attribute - Custom List Only: ...

☐ Create another for same Asset



The types of who that are available (Employee, Operator, and General Public (Guest)) depend on settings, and all types may not show to the user. If the user has an employee ID, the employee ID defaults and the **Employee** option is selected by default. If the user has an operator ID, the operator ID defaults, and the **Operator** option is selected by default. Otherwise, it defaults to the **Guest** option.

1. Enter the reporting source and Jurisdiction of the problem.
2. Identify yourself by ensuring your ID or (guest) information shows in the appropriate field on this page.
 - **Employees:** If your **Employee ID** is not already defaulted, enter your Employee ID or click the search button and select the ID from the choice-list.

A screenshot of the 'Employee' section of a form. It features a dropdown menu labeled 'Employee' with a downward arrow. Below the dropdown is a text input field labeled 'Employee ID' containing the value '1000-11'. To the right of the input field is a search button with three dots and a dropdown menu showing 'MARY SMITH'.

- **Operators:** If not already defaulted, enter your **Operator ID** or click the search button and select the ID from the choice-list.

A screenshot of the 'Operator' section of a form. It features a dropdown menu labeled 'Operator' with a downward arrow. Below the dropdown is a text input field labeled 'Operator ID' which is empty. To the right of the input field is a search button with three dots and a dropdown menu.

- **Guests:** Enter identifying information in the freeform fields.

A screenshot of the 'General Public (Guest)' section of a form. It features a dropdown menu labeled 'General Public (Guest)' with a downward arrow. Below the dropdown is a text area with the message: 'Please consider leaving us your name and contact information (your information will be kept confidential, and we will not share it with anyone)'. Below the text area are three text input fields labeled 'Name', 'Phone Number', and 'Email Address'.

3. To advance to the next step, click the next tab (on the left panel) or click the **Next** button.

WHERE is the problem?

When you move on to the next step, the Report a Problem Online page (**Step 2: WHERE is the problem?**) displays a green check next to the completed step.

The screenshot shows the 'Report a Problem Online' form. On the left, a sidebar lists three steps: 1. WHO are you? (marked with a green check), 2. WHERE is the problem? (current step), and 3. WHAT is the problem?. The main area is titled 'Where is the Problem?' and features a map of Spokane, Idaho, with labels for various neighborhoods like Pitcher, BEMISS, Millwood, Spokane Valley, ALPHA, Otis Orchards, East Farn, Liberty Lake, CHESTER, and THORPE. Below the map is a text input field labeled 'Describe the asset or equipment (please be specific)'. Underneath this are three text input fields: 'Text Attribute - BUS ACAT', 'Text Attribute - value required', and 'Text - Supported By Track ACAT only'. At the bottom of the form are buttons for 'Cancel', 'Create another for same Asset' (with an unchecked checkbox), 'Back', and 'Next'.

1. Identify where the problem is using one of the two available methods:

- **Option A:** Enter the asset ID or search for one.

 **Note:** For linear assets, you will need to enter the markers and offsets. If the option is set by the admin, a linear slider displays for you to use to choose them.

The screenshot shows a linear asset selection interface. It includes two rows of input fields: 'From Marker' with values 51100 and 511+00, and 'To Marker' with values 51200 and 512+00. To the right of these are 'Offset' fields with values 1.0 and 47.0. Below these is a summary: 'Asset Length 470.0 ft' and 'Selected Length 146.0 ft'. At the bottom is a horizontal slider with a blue bar representing the selected length. The slider has markers at 510+00, 511+00, 512+00, 513+00, and 514+00. A green triangle is positioned at 511+00, and a red square is positioned at 512+00.

- **Option B:** If the asset ID is unknown or uncertain, please describe the asset to the best of your ability. Follow instructions listed below for the particular option then proceed on to complete the service request.
2. Continue on to the next two sections for completing the where section with either Option A or B.

Option A

1. Enter the asset ID or search for one:
 - i. Click the **Search for Asset ID** button or enter the Asset ID in the field.

Option A: Enter the Asset ID or Search for one.

Search for Asset ID

Lookup

Depending on settings, either the Asset Chooser or an Asset ID choice-list displays.



Note: The Asset Chooser is also used in the Shop Activity portals. Please refer to the *General Application Information Guide* for additional information about the Asset Chooser.

- ii. Filter to narrow the list, and click on an Asset ID to select it.

The system looks up some basic information about the asset, including a thumbnail image (if provided), and a history of the ten most recent problems reported. The asset's basic information is displayed on the page.

Option A: Enter the Asset ID or Search for one.

Search for Asset ID

CAR01

Lookup

Clear

Asset Information

CAR01 2006 JEEP GRAND CHEROKEE==Meters: 1-20100 MILES; 2-200 HOURS==JEEP GRAND CHEROKEE

Asset Type	VEHICLE	Asset Category
Station Location	1 - OPS	Repair Location 1 - OPS

Problems Already Reported:

Date Reported	Problem Code	Problem Description	ID	Status
08/07/2018 14:49	QA-SYMP-CRACK	3C TASK GENERATED	CAR01-2947304	OPEN
03/21/2017 11:05	QA-SYMP-CRACK	3C TASK GENERATED	CAR01-2941000	OPEN

*When the asset's information displays, the map is hidden, and **Clear** shows next to the Asset ID field to reset the form in case the user decides to describe the asset instead.*

- iii. You can choose to enter an address in the Option B area. This will create an address on the service request that can be used as more information (such as area the problem was noticed, accident took place, etc).
2. When the asset location information is complete, click the next step's tab, or click the **Next** button to advance to the next form. Continue with the instructions in the [WHAT is the problem?](#) section

Report a Problem Online

Use this form to report problems and safety concerns. If this is an emergency please call 911.

1 WHO are you? ✓

2 WHERE is the problem? ✓

3 WHAT is the problem?

What is the Problem?

Please choose a symptom code that best fits the problem, and describe the problem in your own words.

Symptom Code

Priority Code

Describe the Problem

(Optional) Photos/Files

Text Attribute - All Acat - Acat Required

☐ Create another for same Asset

Option B

1. If the asset ID is unknown or uncertain, please describe the asset to the best of your ability using option B.

In this workflow, it is best to provide as much information as possible. If insufficient information is provided, the organization will not know how to uniquely identify the asset

and may have to either ignore the service request, or contact you for more information (assuming contact details were provided).

 **Note:** Please note that user input is not validated here so it is possible to enter incorrect addresses.

2. Select the **Asset Type** from the drop-down list.

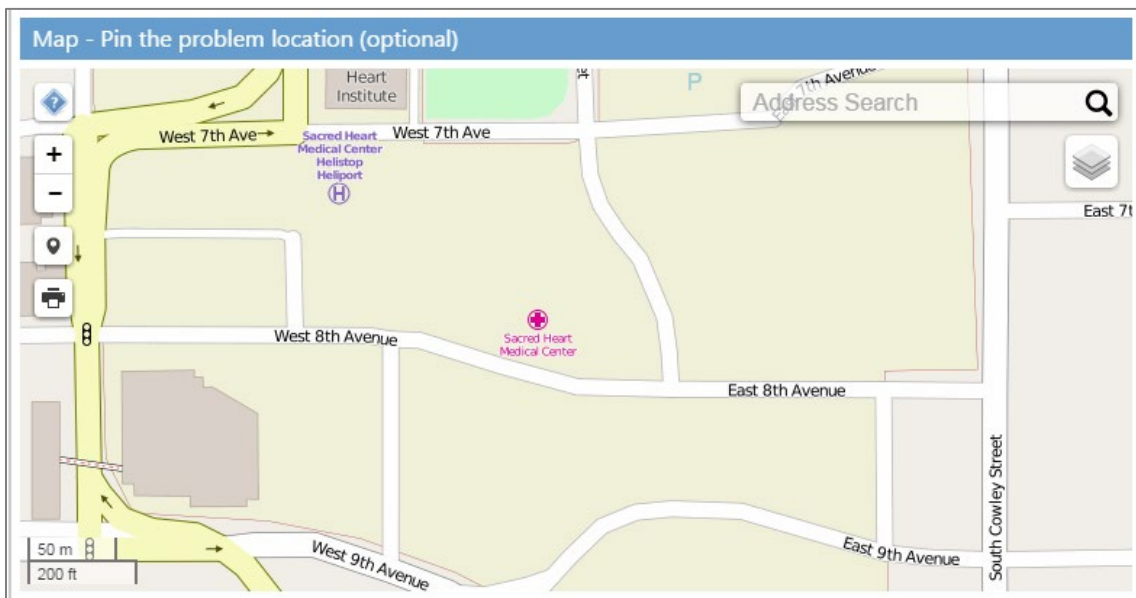
Asset Type choices are driven by portal options depending on whether user is authenticated or not. **Asset Category** populates based on the selected Asset Type.

What Kind of Asset is it:

Asset Type

Asset Category

3. Pin the problem location to a map. This is optional.



4. Complete the location information in the **Asset is Located Near this Address** section. For fixed or stationary assets such as traffic lights, fire hydrants, buildings, etc., the address can be entered. You can also click Pin Address on Map to pin the location.

Asset is Located Near this Address:	
Address	
Address line 2	
City	
State / Province	
Pin Address on Map	

- Complete the description information in the **Describe the asset or equipment** section.

Describe the asset or equipment (please be specific)	Show Examples



This section allows free form entry to describe the asset. There are a few out-of-box examples. Click **Show Examples** to see examples and click **Hide Examples** to hide them.

*The Show Examples link changes to **Hide Examples** and sample asset descriptions display.*

Describe the asset or equipment (please be specific)	Hide 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	



The examples can be tailored via the portal settings page so organizations can show what types of details are expected.

- When all the asset location information is complete, click the step 3 tab on the left panel, or click the **Next** button to advance to the last step in reporting a problem online.

WHAT is the problem?

When you move on to the next step, the *Report a Problem Online* page (**Step 3: WHAT is the problem?**) displays a green check next to the previously completed steps.

Report a Problem Online
Use this form to report problems and safety concerns. If this is an emergency please call 911.

1 WHO are you? ✓

2 WHERE is the problem? ✓

3 WHAT is the problem?

What is the Problem?

Please choose a symptom code that best fits the problem and describe the problem in your own words.

Symptom Code

Priority Code MILEAGE CARD COMPLAINT

Describe the Problem

(Optional) Photos / Files

☐ Create another for same Asset. Next and Back bts?

Identify what the problem is by completing the form as follows:

- Enter a Symptom Code. Symptom Code is a required field.
 - Click the **Chooser** button to choose a symptom from the list. The list is arranged for easy selection of the symptom and offers hierarchical symptom selection if desired.
 - The setup for hierarchical symptom selection is shown in the example screenshots:

- If desired, you may create a hierarchy of symptoms that include parent, child, and related symptoms. Create symptoms on the Shop Activity Symptoms screen, Basic Info tab.

The screenshot shows the 'Symptoms' screen with the 'Basic Info' tab selected. The interface includes a top navigation bar with 'Symptoms' and 'ADMIN MO'. Below the navigation bar are buttons for 'Search', 'Reload', and 'Sort', along with 'Select Filter' and 'Select Sort' dropdown menus. On the right, there are buttons for 'New', 'Copy', and 'Delete'. The left sidebar contains a list of tabs: 'Basic Info' (selected), 'Manufacturers', 'Asset Categories', 'Corrections', 'Reporting Sources', 'Procedure Info', and 'Related Symptoms'. The main content area displays the 'Basic Info' form with fields for 'Name' and 'Description'. Below the form is a table titled 'Supported tasks' with columns for 'Row #', 'Delete', 'Task ID', and 'Task description'.

- To create a hierarchy and relate symptoms to each other, use the Related Symptoms tab on the Symptoms screen. The first screenshot shows, the Child (FLAT TIRE) symptom related to its Parent (BACK LEFT) symptom. While the next screenshot shows the Parent (TIRES) symptom related to its Child (Front Left, Front Right, Back Left, and Back Right) symptoms.



Note: The Parent/Child relationship is established by checking the box for **This symptom to be used only as a parent to related symptoms**. If the box is not checked, the related symptoms listed on the Related Symptoms tab are simply related to the symptom on the Basic Info tab above.

After clicking the **Chooser** button, the choice-list displays. The example screenshot below shows our example organization that has set up main (parent) symptoms from which to choose when identifying the problem.

2. Select the symptom. Or, in this example, you may select the main (parent) symptom.

Name	Description	Symptom ID	colS...
TIRES		TIRES	>
ELECTRICAL SYMP CATEGORY		ELECTRICALCATEGORY	>
TIRES		PUNCTURE	
DIRTY	COVERED IN MUD	AC-SYM-DIRTY	

The next choice-list displays child items related to the main parent symptom.

3. Select the desired child symptom.

Choose a Symptom

ALL > TIRES Tires child symptoms are displayed in choicelist

Search

Name	Description	Symptom ID	colS...
TIRES		BACK LEFT	>
TIRES		BACK RIGHT	>
TIRES	THE FRONT LEFT TIRE	FRONT LEFT	>
TIRES		FRONT RIGHT	>

Select desired child symptom

The next choicelist (if setup) displays any Child items related to the previously selected symptom.

Choose a Symptom

ALL > TIRES > TIRES

Search

Name	Description	Symptom ID	colS...
A FLAT TIRE	THE TIRE IS ... FLAT!	FLAT TIRE	

Continue selecting Symptoms as choicelist offers to provide as much detail as desired.

4. Continue drilling-down by selecting the desired symptoms to provide as much detail as possible about the problem you are reporting.
 - **Priority Code:** Depending on settings, priority code may default based on Symptom Code. This field is optional.
 - **Describe the Problem:** Describe the problem and its impact in this free-form text field. Problem description may default based on Symptom Code. This field is optional.
 - **Photos or Files:** Optionally attach files, URLs, or Crystal Reports to the service request by clicking the **Attach Photos and/or Files** button. The Add Link dialog displays for you to upload a file, add a URL link, or add a report link. Please refer to the *Shop Activity Supervisor or Technician User Guides* for details on using the Add Link dialog.

Add Link

 The upload file option requires that the organization correctly setup the system to enable file uploads. Refer to the *Administrator Guide* and the *Configurator Guide* for details on setting up file uploads.

 Note: When adding a report link, use the following steps to get the link to use in the Add Link pop-in.

- From your web browser, copy the part of the report's URL that identifies the report. This contains the folder name (seen below as Shop Activity) and the name of the report (Work Order Detail.rpt).

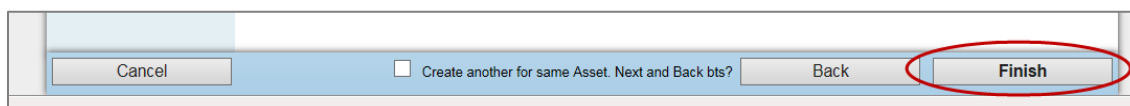
For example:

`http://host/icapp/reporting/Shop Activity/Work Order Detail.rpt`

becomes

`Shop Activity/Work Order Detail.rpt`

5. When you have completed all steps of the Report a Problem Online form, click **Finish**.



You are returned to the Service Request Portal Main page. A message indicates you created a new service request and provides the service request ID. The newly created service request displays at the top of the list of Your Most Recent Requests for Service as shown in the following screenshot.

Add/View Service Requests 

Request Service or Report Problems Online

Request Service or Report a Problem

Your Most Recent Requests for Service

Created new Service Request with ID: KA305-2974507

Date Reported	Asset ID	Problem Code	Problem Description	ID	Status
06/30/2015 09:45	KA305 - CRUISER	FLAT TIRE - A FLAT TIRE	TIRES > TIRES > A FLAT TIRE	1364899	PENDING
05/07/2015 17:03	KGCAR1 - E1 1753 NEW FLYER C40LF 2001 NEW FLYER COMPRESSED NATURAL GAS 40	B07-11 - AIR LEAK		1364899	OPEN
03/03/2015 09:25	RACAR16 - RASNCAR16 2012 HONDA CIVIC GRAY MOTOR POOL SEDAN	ELEC1 - ELEC 1		1364899	OPEN

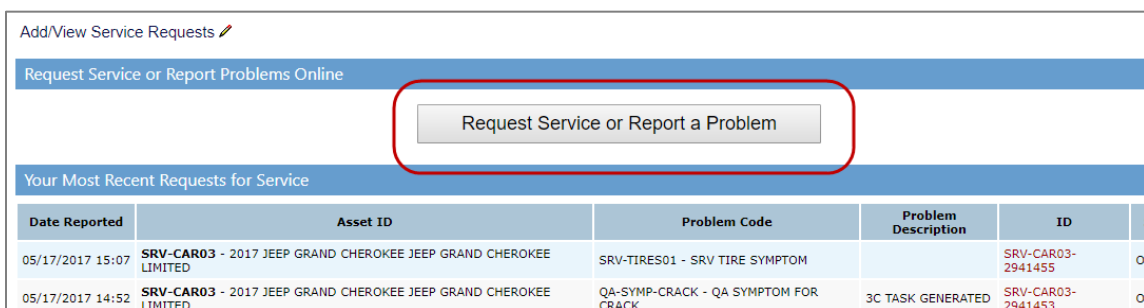
You have now completed the problem report or service request.

Request Service or Report a Problem (mobile-friendly UI)

Mobile UI Request and Report Process

To start a service request or report a problem:

1. Click the Request Service or Report a Problem button.



Add/View Service Requests ✎

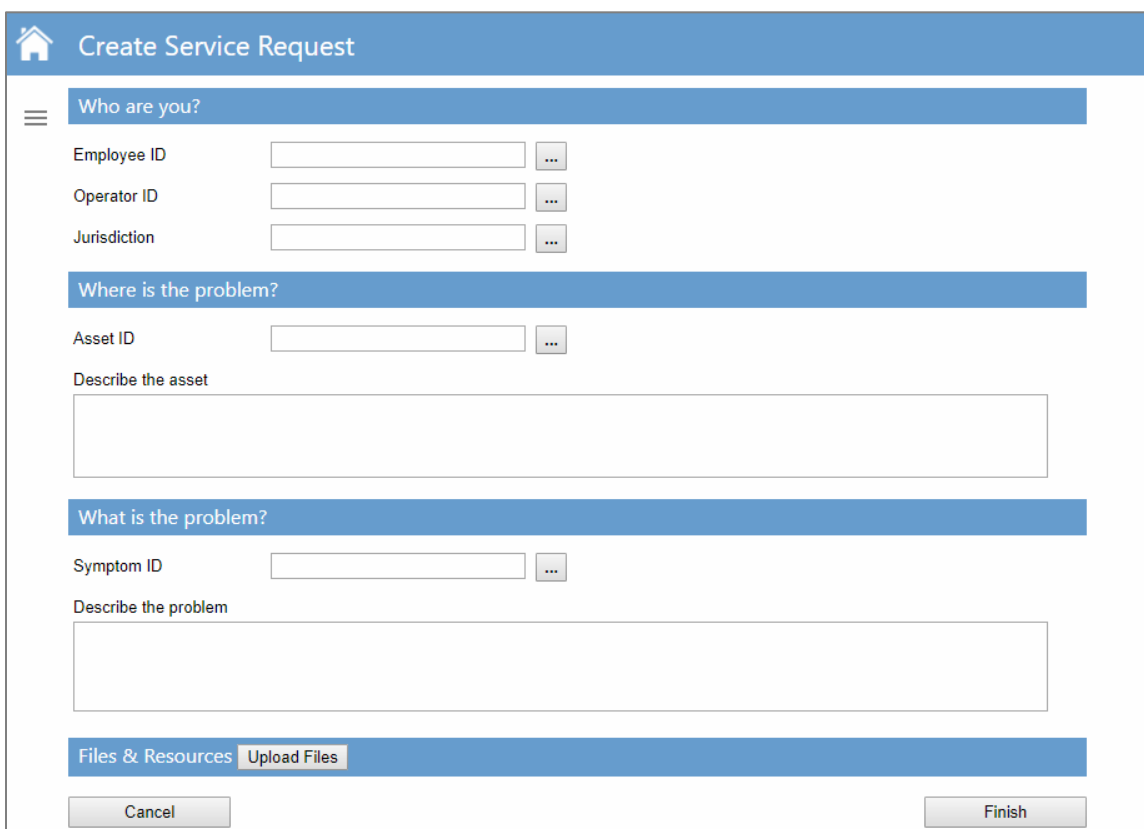
Request Service or Report Problems Online

Request Service or Report a Problem

Your Most Recent Requests for Service

Date Reported	Asset ID	Problem Code	Problem Description	ID	S
05/17/2017 15:07	SRV-CAR03 - 2017 JEEP GRAND CHEROKEE JEEP GRAND CHEROKEE LIMITED	SRV-TIRES01 - SRV TIRE SYMPTOM		SRV-CAR03-2941455	OF
05/17/2017 14:52	SRV-CAR03 - 2017 JEEP GRAND CHEROKEE JEEP GRAND CHEROKEE LIMITED	QA-SYMP-CRACK - QA SYMPTOM FOR CRACK	3C TASK GENERATED	SRV-CAR03-2941453	OF

The Create Service Request page displays.



Create Service Request

Who are you?

Employee ID

Operator ID

Jurisdiction

Where is the problem?

Asset ID

Describe the asset

What is the problem?

Symptom ID

Describe the problem

Files & Resources



Note: Use the navigation menu on the left side to quickly jump to a section on the screen. On devices with smaller screens or resolutions, this navigation menu will display as shown in the right image below. Click the menu button to expand the menu and choose where to go.

2. Fill out the Who are you? section.
 - i. **Employee ID** or **Operator ID**: Enter or use the chooser button to select either the employee or operator ID for who is making the request. An employee or operator is required for the service request.
 - ii. **Jurisdiction**: Enter the jurisdiction for the service request. For example, city or state jurisdiction.
3. Fill out the Where is the problem? section. All fields are required.
 - i. **Asset ID**: Enter or use the chooser button to select an asset ID.
 - ii. **Describe the asset**: Enter a description of the asset.
4. Fill out the What is the problem? section. All fields are required.
 - i. **Symptom ID**: Enter or use the chooser button to select a symptom ID.
 - ii. **Describe the problem**: Enter a description of the problem.
5. Click the **Upload Files** button to add a file or resource if necessary or available.
6. When you are done entering information, click **Finish**, or click **Cancel** to go back to the main Service Request page.
7. If you click **Finish**, a service request is created and the ID is displayed with the confirmation message.