Frequently Asked Questions (FAQ) for the Equipment Module

FAQ's on using the Equipment Module

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FAQ's about the Equipment Module

1. When is the HQ system ready to go live?
2. Is the expectation that we will utilize the system directly or can we feed the system using our existing system and kind of secure data transfer?
3. Is it web based? Is there a disconnected local version that can be used? Is there a PDA version?
4. Does it incorporate Bar Codes and if so what kind of bar code scanning hardware can be used?
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FAQ's about using the Equipment Module

Q: What's the difference between a Maintenance Schedule and a Maintenance Log?
A: A **Maintenance Schedule** is attached to a particular piece of equipment and represents a maintenance activity that needs to be done on a regular basis e.g. monthly, annually, etc. When setting up a Maintenance Schedule, you will select the activity to be done (calibration, etc.) and the frequency that it needs to be completed. Once a Maintenance Schedule has been established in the module, you can generate lists of what maintenance is due during a particular time period.
A **Maintenance Log** is the record of any maintenance activity that is performed for a piece of equipment. These activities can be either scheduled maintenance (as described in the Maintenance Schedule) or unscheduled maintenance or repairs that are done on an "as needed" basis.

Q: What's the best method to add a Maintenance Schedule?
A: There are two methods of adding a Maintenance Schedule, and depending on how many pieces of equipment you are working with will determine the best method. If you have one or two pieces of equipment adding the schedule manually maybe the easiest. You will need to search for the equipment, and then navigate to the Equipment Info page, and select the "Maintenance Schedule Info" link on the left, and then you will need to add the necessary info for the schedule (maintenance type, frequency, start date if necessary). You will need to do this individually for each piece of equipment.

The other method involves using the "Bulk Upload of Maintenance Logs". When adding Maintenance Logs using the bulk upload function, the program will check for existing Maintenance Schedules to link to the performed maintenance in the logs. If no Maintenance Schedules are found a new Maintenance Schedule is created using the maintenance type and frequency that are contained in the Maintenance Log that is being uploaded. However, for the upload to work both the maintenance type and frequency must already be entered into the equipment module. This will allow managers to easily add Maintenance Schedules for a large group of equipment. This could be used to update an existing calibration schedule, or to add schedules for newly acquired equipment.

Q: I changed a Maintenance Schedule, can I remove the old Schedule?
A: Yes, if you no longer want a specific Maintenance Schedule because you've added a new one, or you no longer require that type of maintenance you can delete the old schedule. This will NOT delete the maintenance logs (records) that were recorded using that schedule.
To delete the old schedule, you will need to search for that particular piece of equipment, and then access the Maintenance Schedule from the "Equipment Info" page. Select the old Maintenance Schedule and then click on the "Delete" link on the right hand side.

Q: How can I remove equipment from the Equipment Module?
A: Due to record keeping requirements there is no method for completely removing equipment from the Equipment Module. However, using the equipment status codes you can designate equipment as excessed, destroyed, etc. There is also a code for "deleted, data input error" if that is needed. If you are only working with a few pieces of equipment changing the

status on the "Equipment Info" page will be the easiest method. However, if you are working with a larger group of equipment there is an easier method using the Field Check-out function. First search for the equipment and add it to your Check-out Cart. Once all the equipment is in the cart complete the check-out process and select "disposal" as the check out type. Then go to the "Checked-out Equipment" page and locate the equipment that was just checked out and select it for Check-In. On the check-in page you can select the appropriate status (e.g. excessed, destroyed, returned to owner) for the equipment. Upon completion of the check-in that equipment will no longer appear in searches for available equipment. The only way you can review the equipment again is to search for the equipment using the status code you selected to 'remove' it from the database.

Q: How do I attach an operating manual to equipment within the Module?
A: There are several places where additional information can be added to a piece of equipment. Short descriptions and comments can be added to the fields on the Model Info page; however these are limited to 4000 characters. To add more information such as an Operating Manual, you will need to attach it as a document. Document attaching is done on the Model Info page, which you access after searching for the particular model, and then clicking on the model name. Once you are on the Model Info page, select the "Documents" link in the left margin and complete the necessary information about the document you wish to upload and attach. Click on save and you're done.

Q: When to use Transfer vs. Check-out. Why Transfer if you can Check-out?
A: Short Answer; check out goes to a person, transfer goes to a warehouse.
A: Long Answer; if the equipment is transferred then the new warehouse can checkout to one or more persons and have a record of who checked it out. If the equipment is checked out, then it is the responsibility of borrower (i.e. OSC); if the OSC lends it to another person, there is no record of that use. Transfer also moves responsibility for holding and maintaining the equipment to the new warehouse manager (if different) and includes equipment and any associated P&S in the transferred-to warehouses inventory. It is the warehouse manager's decision whether, in a specific case, to check out the equipment or to transfer the equipment. *See also the discussion of the "assign to OSC" options.*

Q: What's the best method to assign equipment to an OSC?
A: There are numerous ways to do this, each has its advantages and disadvantages. A detailed matrix of these options is available by request.

1) Create/Assign a warehouse for the OSC. This method has the following advantages:
    a. It allows for checking-out the equipment to other users while maintaining the OSC relationship.
    b. The equipment in the OSC warehouse can be managed by either the OSC or the regular warehouse manager.
    c. Complete records (check-out, Maintenance, etc.) are maintained within the system.

There are only minor disadvantages to this method; the OSC will need to be given rights as a warehouse manager to work with the equipment, and the OSC equipment will need to be transferred from the main warehouse to the OSC warehouse.

2) Permanent Check-out: prevents the equipment from being used by others since it is checked-out. Maintenance activities & records will be problematic since the equipment is checked-out.
3) Assign a Sub-Location for the OSC; this method will allow the equipment to be checked-out by others, but the 'link' to the OSC will not be maintained (other than in comment fields, etc.). Other records (maintenance, etc.) will not be affected using this method.
4) Link OSC and Equipment: The linked equipment will be treated the same as 'regular' equipment in terms of check-out and maintenance, but there will not be a historical record of the OSC link in the tracking records.

Q: Can you build a Kit with only Parts & Supplies?
A: Yes, but with qualifications. Since Kits are considered to be equipment there needs to be a piece of equipment that is used as the parent or anchor of the kit. If there is not any appropriate equipment to anchor the kit, warehouse managers can create a piece of equipment (i.e. R2 ___ Parts Kit). It will be necessary to make the kit name somewhat descriptive (i.e. AreaRAE Parts Kit) so that it can be properly classified within the Nomenclature system. Once the anchor is created then the appropriate P&S can be added to the kit.

Q: When a Kit is transferred, do the parts & supplies go with it?
A: Yes, All equipment and P&S that have been included in the kit are transferred to the new warehouse. The P&S inventories for both warehouses will be adjusted to reflect the transfer. NOTE: recommended equipment and recommended P&S will not be transferred automatically. These items will need to be manually added to the Transfer Cart if you wish to transfer them as well.

Q: How can I get a report on maintenance activities that are due next month?
A: There are several ways to generate this report;
1) Pre-configured Reports- from the "Reports" menu you can list maintenance activities by selecting "Equipment Maintenance Data" and after selecting your region you can list any or all maintenance types that are due next month or quarter. This report will list the following data; Serial Number, Barcode, Model Name/Number, Maintenance Type, Frequency Type, Due Date, and Status . The report can be saved as either an Excel, PDF or HTML file. NOTE: in Version 6 you will be able to select a date range rather than the predefined ranges (30 or 90 days from the current date).
2) From within the Module you can select Equipment > Equipment Maintenance from the main menu and that will generate a list of all equipment that has a Maintenance Schedule associated with it. This list can then be filtered by Maintenance type and frequency (monthly, quarterly, etc.). This report will list the following data; Model, Name/Number, Warehouse, Barcode, Serial Number, Status, Maintenance Type, Maintenance Frequency, Performed Date, and Due Date. The resulting list of equipment can be exported as an Excel or PDF file.

3) From the Equipment Search page within the Module you can search for all equipment that has Maintenance due with a time range that you select. This search can also be filtered by Maintenance Type. NOTE: This report will not list as many Maintenance details as method #2 only the last calibration date and the last repair date, no due dates are listed. The resulting list of equipment can be exported as an Excel or PDF file.

Q: How do I Record Maintenance on a Kit
A: After you build a kit with several pieces of equipment you will eventually need to perform and record the maintenance for that equipment. However recording maintenance on kits is different from a single piece of equipment.

A kit can be "**Checked Out for Service**" and the Maintenance Log for the kit will be updated with the appropriate maintenance, however the equipment contained in the kit will **NOT** have any maintenance recorded. For example if the kit (i.e NDT-155-0, an AreaRAE Rapid Deployment Kit) consists of multiple AreaRAE units (NDT-156, NDT-157…NDT-161), and you record a maintenance task (i.e. Functional Test or Inventory Check) on the kit, NDT-155, only the Maintenance Log for NDT-155 will show that task. The Maintenance Logs for the individual units will not show that task. In order to properly record the maintenance performed on the components of the kit, you will need to locate each component and then record the necessary maintenance.

One way to locate the equipment is by using the "**Maintenance Schedule Search**". Using a model name combined with the appropriate "**Maintenance Frequency**" or "**Maintenance Type**" should help in easily locating the desired equipment. Once you have your search results, you can select one or all of the components for maintenance. After selecting the kit component(s), press the "**Perform Maintenance**" button and complete the necessary information for that maintenance. Now the Maintenance Logs for each component will be updated with that maintenance task.

Q: Functional tests - how do you record these tests for large numbers of equipment in a minimal amount of time?
A: One way to accomplish this is to search for the equipment using the "**Maintenance Schedule Search**". However, this assumes that the equipment has a Maintenance Schedule set up for "Functional Test", if it doesn't then you will need to set up that schedule in order to make recording that maintenance easier.

Within the "**Maintenance Schedule Search**" locate the desired equipment by selecting the appropriate warehouse, the **Maintenance Type** and/or the **Maintenance Frequency**, or possibly the **Date** range when the maintenance is due. On the search results page, select the desired equipment and then press the "**Perform Maintenance**" button and complete the necessary information for that maintenance. Now the Maintenance Logs for each component will be updated with that maintenance task. NOTE: In Version 6 if your search results cover more than one page, you will need to record the maintenance for EACH page of equipment. The system will not record the maintenance on the complete list. The "Select All" button will only work on the equipment that is on the page that is displayed.

Q: How do you add a PDF version of a service invoice?
A: When you record a maintenance task or repair for a piece of equipment, you can also associate that maintenance/repair with an invoice using the appropriate fields on the maintenance log screen (see the QSG "Select a Service Organizations & Invoice" for more information on this). However to add a PDF version of the invoice you need to edit the Maintenance Log entry for that activity.

To accomplish this you need to use the "**Equipment Maintenance/Repair Log Search**" under the "**Equipment Service**" tab. Search for the log entry using the barcode number, the Date performed, or any of the other search fields. Once the appropriate entry is located, click on the "**Edit**" link to open that Maintenance Log entry. On the Log entry page select the "**Maintenance Documents**" link in the left sidebar menu. This will take you to a page where you can upload a copy of the service invoice. In the present system you will need to upload this document for each Maintenance Log entry that you wish to associate with this invoice. A possible work around for this limitation would be to upload the file once, and then use the comment field on the Maintenance Log entry to note which piece of equipment has the invoice linked to it.

Q: How do you add people to the system and/or warehouse?
A: When checking equipment in or out for maintenance or service you need to select a person for both the "**Borrower**" and "**Checked Out To**". Many times this person maybe a contractor or other non-EPA personnel and that means they will not be found using the person search function (unless they have already been added to the system).

To add a person for a Field or Service check out, you do this from the check out page. Click on the "**Pick Person**" link next to the "**Check Out To**" box. When the new window opens up, there is a button for "Add Person". That screen will let you add someone to the system. The required fields are: name, email address, address (street, city, etc.) and phone number. ***NOTE***: The "**Pick Person**" link next to the "**Borrower**" box does not have this option.

Because the system doesn't automatically select the person that you just added, you have to use the search page and then select them. ***NOTE:*** Even though the "Add Person" button only shows up for the "**Check Out To**" field, once you have added them to the system, you can use the pick link on the "**Borrower"** field to add them there also.

FAQ's about the Equipment Module

Q: When is the HQ system ready to go live?
A: The new system, the Equipment Module of the Emergency Management Portal, is online and Regions 2, 3, 4, 5, and the NDT & ERT-KY warehouses are already in production. Regions 6, 7 and 9 are expected to be online in early July 2009. All emergency response warehouses are required to be live and in production by the end of 2009.

The Equipment Module provides functionality to capture data about warehouse management, Check-in/check-out of equipment and parts & supplies, equipment maintenance and repair, search functionality for equipment across the nation, as well as other functionality.

Q: Is the expectation that we will utilize the system directly or can we feed the system using our existing system and kind of secure data transfer?
A: There are no plans to continuously migrate data from Regional systems into the new system once a region is in production. The Equipment Module is intended to be used by all Regions as the sole source for emergency response equipment management.

Q: Is it web based? Is there a disconnected local version that can be used? Is there a PDA version?
A: The Equipment Module's primary data entry point is web-based and is accessed through the EPA Portal, to which all EPA staff has access and contractors can be granted access. In addition, for those warehouses with inadequate internet access, we have provided an off-line version which the warehouse managers can use on a day-to-day basis, with data sync to the on-line database on a periodic basis (due in October 2009). There is no "PDA version" of the Equipment Module

Q: Does it incorporate Bar Codes and if so what kind of bar code scanning hardware can be used?
A: Only one region has requested data entry via barcode reader; however, the Java application that is our front end should have no trouble reading barcodes from an input device. We will work on providing this functionality in future versions, along with other feature requests as they received and prioritized.

Q: If we are to utilize the system will they pre-load our data?
A: All warehouses are required to use EMP-Equipment directly; no ongoing data transfer will be supported. Once your current data is received and processed, it will be migrated into EMP-Equipment for your use there.

Q: Are there training materials available (Manuals, PowerPoint's, etc.)
A: The National Decontamination Team (NDT) is the module "owner" and provides all user support and training as well as support of the Equipment Nomenclature. NDT can answer many of your questions and arrange for training on the use of the Equipment Module.