



US EPA, OSWER, OEM EMP - Equipment Module Newsletter

Volume 4

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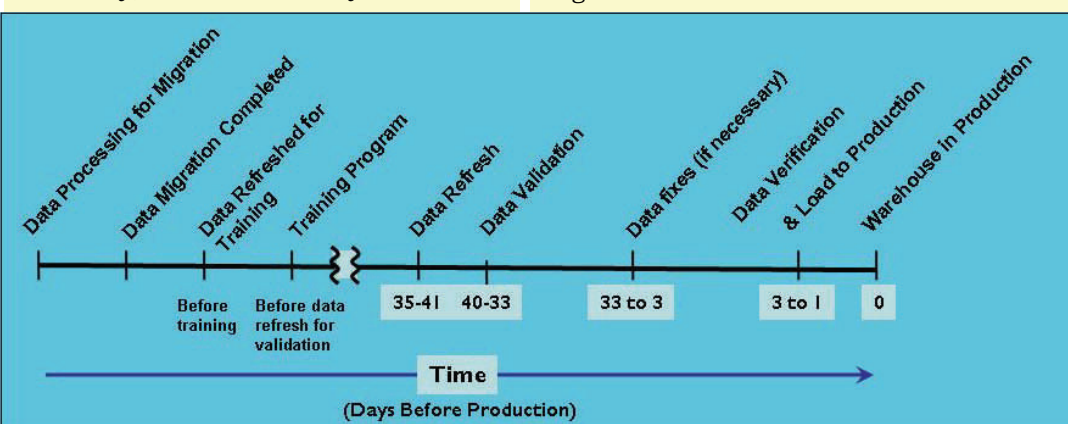
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Timeline for Production

The process to transfer your data into the new Equipment Module has many steps. The data sent by the Regions is first received by Lockheed Martin (LM) contractors, then data are processed for migration into the Equipment Module. This is completed through email exchanges between the regions and LM. When the information is migrated correctly, the data are ready for

Training. NDT will visit the region and provide training to all potential users of the Equipment Module. After training, the data are "Refreshed", and then must be "Validated" by the Region. If errors are found, they are fixed by LM, and then the validated data are loaded into "Production". The Region is fully functional in the Equipment Module! See figure below for timeline.



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Training & New Versions

FAQ's (Frequently Asked Questions)

In this month's newsletter, we are providing the FAQ's on page 3. FAQ's will also be uploaded into the EMP-Equipment Module workstation. After you log into the EPA Portal (Enterprise Portal) under My Communities

- > Emergency Management Community
 - > Emergency Management
 - > Equipment - you have successfully navigated yourself to the EMP-Equipment Module workstation.

Web Conferencing HELP!

We are excited to announce our "User Help" upcoming monthly Web Conference. Instructions are on page 3. Web Conferencing will be provided to new users on the training for Equipment Module and the first 3 proposed dates/topics are:

- **April 23** - Kits, Maintenance, & Search
- **May 21**—Check in/out, Reports, P&S
- **June 18** - V6!!

Training and New Versions

Training for the Equipment Module is coordinated by Jeanelle Martinez, NDT and Ed Mullin, Dynamac. We provide user help, support and training. The following is the current Production schedule planned for the Regions:

- In Production: R2, R3, R4 & ERT/NDT
- Next in line for Production: R5, R6, R7, and maybe R9
- Scheduled for Sept/Oct.: R1, R8, ERT-LV,
- Scheduled for Nov: ERT-NJ, RERT-LV, RERT-AL.

V6 is scheduled for release June 15. The new V6 enhancements contain many of the recommended changes received early in 2008. The changes will be discussed in the June Web Conferencing so mark your calendars!

V7 will be released the end of 2009. V7 will provide the synchronization necessary for the offline version that was released in V5.





Web Conferencing on the EPA Portal

One of the features of the EPA Portal is the ability to conduct a Web Conference, which will let you share computer screens among logged in users. We will be using this tool to provide help in using the Equipment Module. Listed below are the steps needed to configure your computer to use Web Conferencing and how to join a conference. NDT will be hosting Equipment Module web conferencing on the following dates:

April 23 - Kits, Maintenance, & Search
May 21—Check in/out, Reports, P&S
June 18 - V6!!

Configuring your computer

- Once you are logged into the Portal, there is a link for "[Web Conferencing](#)" at the top of the page just below the header.
- Clicking on that link will open a new window titled "Oracle Real-Time Collaboration"
- You will need to login to the Collaboration site using your Portal login information.
- To configure your computer click on the "[New User](#)" link in the blue header to get to the "New User" page.
- On the New user page, Click on the "[Run](#)" button on the far right side. This will start the testing program.
- Depending on your computer you may be asked to install software that is needed to enable the conferencing.
- Assuming that your system passed the tests you are ready for web conferencing.

Joining or Starting a Conference

You can either join a conference or start your own Instant Conference depending on how the conference was initiated (i.e. use Start if you want someone else to join you, use Join if someone has invited you). For the most part any help sessions will be setup as Instant Conferences as that is the quickest way to get 2 or 3 people together to go over an issue.

Join a Scheduled Conference

- Once you are logged in, select the "**Scheduled Conference**" tab, and then select the Conference Title, (you can also search for the title)
- Enter your name, email and the Conference Key (if needed). In a few seconds your screen will be showing either the desktop or application window of the Conference host.
- At the top of your screen will be an Oracle toolbar with the conference controls & settings.

Join an Instant Conference

- Once you are logged in, there are three boxes on the right hand side of the page. In the box titled "**Join Conference**" enter the Conference ID and the Key if there is one.
- Press the "[Join Conference](#)" button. In a few seconds your screen will be showing either the desktop or application window of the Conference host.
- At the top of your screen will be an Oracle toolbar with the conference controls & settings.

Start an Instant Conference

- Once you are logged in there are three boxes on the right hand side of the page. In the box titled "**Start Conference**" enter a Conference title and the Key if you would like to use this feature (it's optional)
- Press the "[Start Conference](#)" button. In a few seconds your screen will be show the Oracle toolbar at the top of the screen.
- An Oracle information window will popup, this window will contain the Conference ID (i.e. 351459) that you will need to provide those who will be joining your conference.
- Any applications that are running (Internet Explorer, etc.) will now have a button (Click to Share or Click to Stop Sharing) at the top of the window.



Equipment Module FAQ's

Q: When is the HQ system ready to go live? My understanding is that some regions are piloting it now but it is not ready for mainstream use.

A: Short Answer; The system is live.

A: Long Answer; Currently Regions, 2,3,4, and ERT?NDT-Erlanger have their equipment data in mainstream use.

Q: Is the expectation that we will utilize the system directly or can we feed the system using our existing system and some kind of secure data transfer?

A: It is expected that the user will feed the system directly.

Q: Is it web based? Is there a disconnected local version that can be used? PDA version?

A: Yes it is web based and the disconnected local version will be ready by November, 2009. No, there is no PDA version.

Q: Does it incorporate Bar Codes and if so what kind of Bar code scanning hardware can be used?

A: The Equipment Module incorporates a Nonemclature ID number (also called an RCMS or ENL-ID). The bar code scanning is not in the near future plans.

Q: If we are to utilize the system will they pre-load our data?

A: Yes, HQ-IT will work on getting the equipment data migrated into the software.

Q: Are there training materials available (Manuals, PowerPoint's, etc.).

A: Yes, there is help available on the EMP-Equipment Portal Workstation.

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) Preferred Method: 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) Alternate Methods:
 - a. 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.
 - b. 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.
 - c. Link OSC and Equipment; this method is not recommended at this time. 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: If you mark a Maintenance Schedule as "Not Current" (inactive), can you go back and make it "Current" (active)?

A: No, you will need to add a new Maintenance Schedule with same information as the inactive schedule. Don't forget that you can use the Copy Maintenance Schedule with a similar piece of equipment.

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.