

Frequently Asked Questions (FAQ) & Quick Start Guides (QSG) for the Equipment Module

FAQ's on using the Equipment Module

1. When to use Transfer vs. Check-out. Why Transfer if you can Check-out?
2. What's the best method to assign equipment to an OSC?
3. If you mark a Maintenance Schedule as "Not Current" (inactive), can you go back and make it "Current" (active)?
4. Can you build a Kit with only Parts & Supplies?
5. When a Kit is transferred, do the parts & supplies go with it?
6. How can I get a report on maintenance activities that are due next month?
7. How do I Record Maintenance on a Kit
8. Functional tests - how do you record these tests for large numbers of equipment in a minimal amount of time?
9. How do you add a PDF version of a service invoice?

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?
5. If we are to utilize the system will they pre-load our data?
6. Are there training materials available (Manuals, PowerPoint's, etc.)

Quick Start Guides (QSG)

1. Equipment Search
2. Recording Maintenance/Repairs
 - a. Adding a Maintenance Type
3. Select a Service Organizations & Invoice
 - a. Adding a New Service Organization

FAQ's about using the Equipment Module

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: 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.

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.

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.

Equipment Module – Quick Start Guide – Equipment Search

This QSG details how to search for equipment, and some of the functions that you can access once you have located the appropriate equipment.

Equipment Search

<i>Main Search page</i>	Clicking on the “Home” tab will bring up the main Search page. From this page you can search for an individual piece of equipment or for a group of equipment.
<i>Search for SINGLE piece of equipment</i>	Entering the barcode number will locate that piece of equipment provided all the necessary fields are properly filled in. Status: Check that this is set correctly. Checked In is not the same as Available. Warehouse: The system default may not be the warehouse that you need. Selecting ALL will let you find equipment but it will limit what you can do with the equipment (i.e. Service Check-out)
<i>Search for a GROUP of equipment</i>	One of the best ways to search for a group of equipment is to use a combination of search terms such as the Model Name/Number, Manufacturer, and Keyword Search. NOTE: Check the Status and Warehouse as discussed above. Model Name/Number: This field will search on partial names and numbers. Manufacturer: Use the ‘pick’ link, begin typing the name and the system will fill in the matching names, use the ‘pick link to select the company. Keyword (Classification): This field uses the Nomenclature system as keywords to search for equipment. (i.e. pump, SCBA, radiological)
<i>Unsuccessful Search Results</i>	When your search is complete you will see a list of equipment that matches your search criteria. If the equipment you are interested in is not listed, then you can select “New Search” and revise your criteria.
<i>Successful Search Results</i>	When the search is complete you can select several pieces of equipment or a single piece of equipment to work with. Some of the functions that you perform are briefly listed below.
<i>SINGLE piece of equipment</i>	Clicking on the Barcode Number will open the Equipment Info page where you have access to the Maintenance links for adding or reviewing maintenance records (See the QSG, Recording Maintenance/Repairs for more information)
<i>MULTIPLE pieces of equipment</i>	Select the desired equipment using the check boxes on the left. This will allow you to select one of the function buttons at the top & bottom of the list. “Add to Field Check Out Chart, Add to Transfer Cart, Add to Service Check Out Cart”

Related Quick Start Guides

- Recording Maintenance/Repairs
- Service Organizations and Invoices

Equipment Module – Quick Start Guide - Recording Maintenance/Repairs

This QSG details how to record a Repair and/scheduled Maintenance on a single piece of equipment.

Recording Maintenance/Repairs

<i>Locate the Equipment</i>	Perform an Equipment Search using the barcode, model name/number, or keyword.
<i>Select the proper unit</i>	Click on the barcode number to get the “Equipment Info” page.
<i>Go to Log page</i>	On the left hand menu select “Add Scheduled Maintenance/Repair Log”
<i>Select from Maintenance Schedule List.</i>	All Maint. Schedules will be selected by default, Un-Check the Maintenance Types that you are not performing. Use “Select All” if you are not doing Sched. Maint.
<i>Select “Unscheduled Maintenance and Repairs” tab</i>	Using the dropdown box select the necessary repair. If it is not listed you will need to add it before recording the repair. <i>Please see “Adding Maintenance Type” below.</i>
<i>Required Items</i>	The “Performed Date” and “Serviced By” are the only required fields
<i>Add Cost information</i>	Enter the cost data and Service Invoice info – if any (See Service Invoice QSG for details on Service Org & Invoices)
NOTE: Before saving the information, check that only the desired Maintenance Types are selected. The system defaults to selecting ALL Maintenance Types.	
<i>Save Repair info</i>	Press the Save button
<i>Review Repair Log</i>	You should see “Add is Successful” and a list of the Maint/Repairs for the equipment.

Adding Maintenance Type

<i>Go to “Maintenance Types”</i>	Under the “Administration” tab select “Maintenance Types”
<i>Add new type</i>	Select “Add Maintenance Type” link at top of page
<i>Required Items</i>	The “Name” and “Maintenance Type Group” are the only required fields
<i>Enter new information</i>	Enter the name, a description (if needed), and select a “Maintenance Type Group” NOTE: “Repairing” makes the most sense for one-time repairs.
<i>Add new type</i>	Press the “Add” button; Currently you do not see the “Add is Successful” message.

Related Quick Start Guides

- Equipment Search
- Service Organizations and Invoices

Equipment Module – Quick Start Guide - Service Organizations & Invoices

This QSG details how to add a Service Organization and related Invoices. In order to properly record Maintenance and Repair activities and costs, you will need to designate a Service Organization. Once that company is in the system it's relatively easy, however you may need to add a Service Organization at some time. The steps below will help you do that.

This QSG assumes that you have already selected the equipment and the appropriate maintenance and/or repairs (Please see the QSG on Recording Maintenance/Repairs)

Select a Service Organizations & Invoice

These steps start on the “Add Scheduled Maintenance Log” page
(open this page from the link in the left sidebar menu on the Equipment Info page)

<i>Attach an Invoice to the repair</i>	There are two options to do this depending on whether the invoice has already been added to the system.
<i>Invoice is IN the system</i>	Click on “Pick Service Invoice” and locate the invoice by either number or company name.
<i>Invoice is NOT IN the system</i>	To add the invoice you will need to select an organization first.
<i>Select a Service Organization</i>	Use the “Pick Organization” link to open the popup window, type the company name and select from the listing. If the Organization is not listed follow the steps for Adding a Service Organization below.
<i>Add the new invoice</i>	After selecting the company, click on the “Add Service Invoice” and new entry fields will appear.
<i>Add invoice details</i>	Fill in the required fields: Invoice Number, Date, and Cost, and any additional fields that are necessary.
<i>Select the location(optional)</i>	Use the drop down menu, or select “Add New Address” link
NOTE: Before saving the information, check that only the desired Maintenance Types are selected. The system defaults to selecting ALL Maintenance Types.	
<i>Save the Service Information</i>	Press the “Save” button at the bottom. NOTE: This will save the invoice and service company info as well as the actual Repair or Scheduled Maintenance information – Check that all fields are filled in correctly.
<i>You are finished</i>	If you get the “Add is Successful” message

Add Service Organizations

<i>Go to “Company/Organizations”</i>	Under the “Administration” tab select “Company/Organizations”
<i>Go to the Add screen</i>	Click on the “Add Organization” link at the top
<i>Add the necessary information</i>	Fill in the required fields: Name, Address, City, and Zip Code, and any additional fields that are necessary. NOTE: Since companies often have multiple names and offices, enter enough information to make the new entry as specific as possible.
<i>Save the new company/organization</i>	Press the “Add” button when you have filled in the necessary information.
<i>You are finished</i>	If you get the “Add is Successful” message

Related Quick Start Guides

- Equipment Search
- Recording Maintenance/Repairs