State of Alaska
Department of Transportation & Public Facilities
Statewide Equipment Fleet

Equipment Management System

Catalog of EMS Quick References
Superintendents, Managers and Foreman Menu

2011
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Log On Procedure

Before signing on to EMS, you must have a Log on and Password set up. Once you have received these, enter the information into the appropriate block.

Remember to enter a “u” before your employee number.

The Main Menu for Managers and Foremen will display additional sections of the database which you can navigate to.

By selecting the option you need, you’ll find an additional new menu displayed.

The Main Menu also contains the options for administrative tasks such as changing your password and exporting to Excel.
Log Off Procedure

Before signing on to EMS, you must have a Log on and Password set up. Once you have received these, enter the information into the appropriate block.

Remember to enter a “u” before your employee number.

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Navigating in EMS

EMS uses function keys to start up the screens that you want to query. The function keys are located on your keyboard above the standard numbers.

By using a combination of keys, you can gain additional queries—For example: to access option “13)” you would use the “shift” key and the “F3” button.

PF1 - F1; also used to Acknowledge Delete
PF2 - F2; also used to Scan (record/key lookup)
PF3 - F3; also used to Select Access Path
PF4 - F4; also used to display Previous Image/Activity
PF5 - F5; also used to display Next Record
PF6 - F6; also used for text editing (join text)
PF7 - F7; also used for text editing (split text)
PF8 - F8; also used for text editing (end paragraph)
PF9 - F9; also used to switch to Add Mode
PF10 - F10; also used to switch to Delete Mode
PF11 – F11 or <shift> F1; also used to switch to Inquire Mode
PF12 – F12 or <shift> F2; also used to switch to Change Mode
PF13 - <shift> F3
PF14 - <shift> F4; executes Set Item Attributes option
PF15 - <shift> F5; executes Set Item Attributes option
PF16 - <shift> F6
PF17 - <shift> F7
PF18 - <shift> F8
PF19 - <shift> F9
PF20 - <shift> F10
PF21 - <ctrl> F1
PF22 - <ctrl> F2
PF23 - <ctrl> F3
PF24 - <ctrl> F4
PF25 - <ctrl> F5
PF26 - <ctrl> F6
PF27 - <ctrl> F7
PF28 - <ctrl> F8
PF29 - <ctrl> F9
PF30 - <ctrl> F10
PF31 - <alt> F1 or <ctrl> F11
PF32 - <alt> F2 or <ctrl> F12
Cancel option – Home/End keys (press Home then End)
End option – press the End key to exit screen or menu
Help – Esc F3; displays available help text for field or menu item
Navigating in EMS

Additional Keys

Descriptions

Additional keys defined:

- **Tab** – Tab; moves cursor to next modifiable field to right of current position. The numeric keypad “-” is also defined as a Tab key

- **Back tab** - <shift>

- **Tab**; moves cursor to first modifiable field to left of current position

- **Delete Character** – Delete key; deletes character at cursor position

- **Delete to Item End** – Home Delete; pressing Home key, then Delete key results in all text, from current cursor position to end of field, being deleted

- **Vertical Tab** – Numeric Keypad +; positions cursor at first modifiable field on next line (bypass all modifiable fields on current line)

- **Refresh Screen** - <ctrl> w; redraws screen contents in event screen “looks funny” or contains operating system messages

- **Show Message** – Home m; if multiple informational/warning/error messages are generated, you will be prompted with ‘-- more --’. By pressing Home key, followed by the letter m, the additional messages will be displayed. When finished with the display, simply press <enter> to return to the original input screen.

- **Toggle Print** – Backtick 4; press and release the Backtick key (above the Tab key) and then the number 4 key will toggle the print flag when running reports/lists.
Foremens-Managers-Supt Menu
Menus are developed depending on the job descriptions of those who use them.

Menus are layered and additional menus may be available once options are selected.

Menus will indicate if the screens are for inquiring purposes, reporting or entry.

The WO Processing screen has numerous options for finding WO information., PM option will bring forth Preventative Maintenance screens.

Note: Reporting in EMS is extensive. Additional training and “Quick References” are available to instruct users in creating and printing reports.

1) WO Processing—Work orders, Inquiries, Summary Reports
2) File Lists—Op Data, Classes, Collocation Codes, Employee Records, and Vehicle Lists
3) Rpt & Inquiries—Assets; Repl Rates, Pool Groups, Part Cards, Drive Components, Employee Records, Items by Warehouse, Op Rates, Op History, Parts issued to Assets
4) Cost Reports—Asset and Employee cost reports; Projected cost reports
5) PM—Preventive Maintenance reports
6) Issue Parts—Inventory issues and reports—Issue Parts screen, Inquire on items by Warehouse and Parts issued to WO (by Asset)
7) Warranty—Warranty information
15) Rpts Avail in Excel
18) Change Password
Understanding the Information

ASSET NUMBERS

Asset Numbers are assigned to each piece of equipment you wish to track. The main panel of the asset screen provides you with all the basic information. Behind some of these fields are additional panels of information which “drive” the system.

The lower half of the screen allows you to navigate directly to more information pertaining to the Asset.

Navigation is performed as previously mentioned:
17) - Shift F7
20) - Control F2

Page Down and up by using your keyboard keys

End to exit or F12 to Inquire
Understanding the Information

ASSET CLASSES

Asset Classes are assigned to each asset and provide critical pieces that relate to your Work Orders and PM’s.

Class 149—1/2T 4x4
- Light Duty
- PM is required
- Tracked by Mileage
- Also includes unit life, etc.

<table>
<thead>
<tr>
<th>Class 149</th>
<th>1/2T 4x4 PickUp</th>
</tr>
</thead>
<tbody>
<tr>
<td>Level</td>
<td>01 Light Duty</td>
</tr>
<tr>
<td>Pri Op Unit</td>
<td>Miles</td>
</tr>
<tr>
<td>Group</td>
<td>01 Type 003</td>
</tr>
<tr>
<td>PM Required?</td>
<td>Y</td>
</tr>
<tr>
<td>Amortization</td>
<td>07 Lo 02 Mhi 10</td>
</tr>
<tr>
<td>Bypass 1000 Maint N</td>
<td></td>
</tr>
<tr>
<td>Pool Billing Grp 2</td>
<td>LIGHT DUTY 4X4</td>
</tr>
<tr>
<td>Active Units</td>
<td>1 MI Y 2 HR N</td>
</tr>
<tr>
<td>3 GAL N 4 DAY N</td>
<td></td>
</tr>
<tr>
<td>5 WK N 6 MTH Y</td>
<td></td>
</tr>
<tr>
<td>7 N 8 N</td>
<td></td>
</tr>
<tr>
<td>9 N 10 N</td>
<td></td>
</tr>
<tr>
<td>Fuel Use Comp Ty</td>
<td>2 Op Units per Fuel Un</td>
</tr>
<tr>
<td>Data Post Src</td>
<td>2 Op Data from Fuel Tk</td>
</tr>
</tbody>
</table>

Added On: 03/03/1991 By: KEN
Changed On: 07/27/2006 By: JWP

Class 338—Wheel Loader
- Heavy Duty
- PM is required
- Tracked by Hours

<table>
<thead>
<tr>
<th>Class 338</th>
<th>LOADER WHL 4.5 - 5CY</th>
</tr>
</thead>
<tbody>
<tr>
<td>Level</td>
<td>01 Heavy Duty</td>
</tr>
<tr>
<td>Pri Op Unit</td>
<td>Hours</td>
</tr>
<tr>
<td>Group</td>
<td>04 Type 002</td>
</tr>
<tr>
<td>PM Required?</td>
<td>Y</td>
</tr>
<tr>
<td>Amortization</td>
<td>15 Lo 12 Mhi 20</td>
</tr>
<tr>
<td>Bypass 1000 Maint N</td>
<td></td>
</tr>
<tr>
<td>Pool Billing Grp 4</td>
<td>LOADERS, GRADERS, DOZERS</td>
</tr>
<tr>
<td>Active Units</td>
<td>1 MI N 2 HR Y</td>
</tr>
<tr>
<td>3 GAL N 4 DAY N</td>
<td></td>
</tr>
<tr>
<td>5 WK N 6 MTH Y</td>
<td></td>
</tr>
<tr>
<td>7 N 8 N</td>
<td></td>
</tr>
<tr>
<td>9 N 10 N</td>
<td></td>
</tr>
<tr>
<td>Fuel Use Comp Ty</td>
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<td>Data Post Src</td>
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</table>

Added On: 03/03/1991 By: KEN
Changed On: 01/17/2006 By: JWP
Adding a new Work Order

1. WO Entry
   Follow the same steps as creating a “Routine WO”.—Select F1 and enter to Work Order Processing

2. At WO Processing, Select F1 and enter to the Maintain WO panel

3. At the Maintain WO panel, select “F9” to add WO number and information.

WO Entry
Select F1 and enter to Work Order Processing

At WO Processing, Select F1 and enter to the Maintain WO panel

At the Maintain WO panel, you can hit the F2 key to gain access to the existing WO’s, F11 to inquire on a specific WO, or F9 to add a WO
Adding an “Accident” Work Order

Prior to beginning this entry, you’ll need a hard copy of the Work Order and all accident documentation available.

1. Follow the same steps as adding a new Work Order. This example follows the process from the Foremen’s Menu.
   A. Select Work Order Processing and enter to the “Maintain WO” screen
   B. Select “F9” to add WO number and information.

2. When entering WO info, at the “MaintTyp” field, enter a code of “A” for Accident. Enter “Problem” information as best as can be determined at the time of creating the Work Order. Once information is entered, Select the “Enter” key. The Accident Entry screen will appear.

3. Fill in the Accident date and hit “Enter”. An Accident # will auto-generate and the Asset, Mfg.then model info will default. Add comments or other information. By hitting the “Enter” key, EMS will navigate to the WO panel and allow you to enter the Work Performed, Labor, Parts, etc.
Adding an "Accident" Work Order

1. Work performed comments can be added, along with labor, parts, and other costs.

To navigate back to the Accident Entry Form, Select 22) — (Ctrl F2)

5. Costs that are added at the Work Order are tabulated on the Accident Entry Form.

SEF Costs are rolled from Work Order
3rd Party costs and reimbursements (Pmts Rcvd) are manually entered.
Total Cost = (SEF + 3rd Party) - Pmts Rcvd

Accident Entry Form
The Accident Entry form has been edited and now contains costs and a comments section. Accidents can be added independently of work orders but SEF costs will not tabulate unless the WO No is added. A Department Code is required. If accident occurred during a prior departments ownership, research should be completed to ensure costs are appropriately billed.

Rules: Only one WO per Asset/Accident Date combination.
A WO can be added to the Accident Entry Form after its been created.
WO Reporting

By selecting these Function key, displays or reports are made available.

F5) Clsd WO Recs—Displays WO Individually

F6) Clsd WO Inquiry—Reports

F7) Clsd WO List—Prints listing of WO numbers in a spreadsheet view

F8) Clsd WO Print—Allows a range of Work Orders to be printed. Full WO is printed

F9) Clsd WO Summary by Veh—Report by Asset in a spreadsheet view

F10) Clsd WO Metr Update List—Reports by Asset in a spreadsheet view of meter reading history
Preventive Maintenance

At the Foremen’s Menu, select F5) PM

Select the function key that corresponds to the work you are doing.
Condition Reports

Asset Condition Reports are available either from an associated Work Order or from the PM Menu. The screen is modeled after the current Condition Report section of PM Work Orders.

1. To access from Work Order; enter information as per your current procedure. You’ll see a new option F21) CondRpt at the lower menu. Select Shift F11 to navigate to the screen.

2. At the Condition Report screen, the Asset number will automatically populate. Change to “ADD” mode by selecting F9. Enter information as needed.

3. Once in “ADD” mode, the Work Order and date will automatically populate. Fields required are: “Rpt by:” and Y/N; yes or no, to “Road Ready”.

4. Although all fields are not required, the more informative the better. Ensure your report is complete and tells the story. Once you hit enter, the email is automatically sent to SEF HQ.

Rules:
The Rpt Date must be within the WO date. (You cannot add a report in 2011 for a 2007 WO) Duplicate reports cannot be submitted for the same asset, WO, and date.

Asset Rules:
Only Active “AIS” or “C” status assets can have a condition report added.
**Condition Reports**

1. To access the Asset Condition Reports from the PM Menu, navigate to option 1).

2. At the Condition Report screen, you can Inquire, Scan, or Add depending on your requirements.

3. Select and enter the asset to display or manually enter the asset number you’d like to report.

4. Once asset is entered, the “Rpt Date”, “Rpt by”, and “Road Ready” fields are required. Ensure your report is complete and tells the story.

   Once you hit enter, the email is automatically sent to SEF HQ.

   To print a copy for your records, Shift F8 will print the report.

**Rules:**

- WO is not required but if used, the Rpt Date must be within the WO date(s); i.e. you cannot add a report in 2011 for a 2007 WO.
- Duplicate reports cannot be submitted for the same asset, WO, and date.

**Asset Rules:**

- Only Active “AIS” or “C” status assets can have a condition report added.
Printing Reports
Record Selection

Similar to searching on the Web, EMS allows users to narrow their search by entering in criteria at the “RECORD SELECTION” screen. This screen will display when navigating through report screens. The field name displays on the left. The center column allows for parameters or conditions to be selected. The “Field name or Constant” is what your comparing.

1. The Field Name in the first column is derived from the database fields of the report. To display additional fields available, scroll down by selecting the “Page Down” key. The text “(more)” will display at the bottom if more fields are available. The Field Names cannot be changed. These fields have been identified for the report and are programmed.

2. The parameters in the center column are displayed by scanning (F2) or by typing the parameter desired. Scanning is preferred to ensure the correct text is entered.

Parameter Translations
EQ—Equals
EX—Excludes
GE—Greater than or equal to
GT—Greater than
IN—Includes
LE—Less than or equal to
LT—Less than
NE—Not equal to
RI—Regular expression, case insensitive
RS—Regular expression, case insensitive
Printing Reports
Sort Order and Disposition

1. EMS reports allow you to select sorting options. A sort order will default but is easily changed.

2. Change the sort order of the report by changing the “Sort Level” to your requirements. In this example, I’ve changed the primary sorting to the Asset ID. If I wanted to sort by Asset ID and Location, I’d enter the number “2” at the Location Field Name and hit “Enter”.

To view more fields available to sort, select Page Down. The (more) at the bottom of the page indicates more fields are available.

3. Select “Enter” once you’ve made your selections and you’re ready to navigate to the Report Disposition screen.

The defaults are set up individually per user. Printers are identified for the location you are assigned and the default “Format” is normally a text version. For more information, contact EMS support directly.

Select “Enter” to display your report. If you would like to cancel the report, select the “Home” and “End” keys in sequence.
Printing Reports

Example—Veh List by Location

Before you begin, determine what information you want to find. In this example, the report requirements are: Print a list of vehicles in “AIS” status and location. Report title: Vehicle by Location Report

1. From the Foremen’s menu, Select F2), “File List”.

2. Select F15 (Shift F5) for the report titled Veh List (Location)

3. A dialogue box will appear asking for the meters to display. Select F1) for the Current Meter, F2) for the Life to Date Meter readings. For this example, I’ve selected F1).

4. An additional dialogue box will appear asking if you want to include only Billable Maintenance Assets. For this example, I’ve left the default to “No”. Hit the “Enter” key to move forward to the record selection.

5. The Record Selection screen will appear allowing you to enter in the criteria for the report. Examples follow.

Note: A guide has been developed to explain the use of this screen. New users should review it prior to moving forward.
Printing Reports
Example—AIS Vehicles in Ninilchik

Report requirements: Print a list of vehicles in “AIS” status located in Ninilchik.

1. In this example, the report “Vehicle List” report has been selected. The Record selection screen will default as shown. At row 5, Vehicle Status, place your cursor in the center column. When you scan, the options will appear. Select “EQ” or enter the text “EQ” for equals.

2. Enter in the Vehicle Status “AIS”. Remember, you are asking for assigned vehicles.

3. The Location Field Name does not appear on the first page. Use the “Page Down” key to find Location Description. At row 21, Location Description is displayed. The center column is changed to “EQ” for equals and the text “NINILCHIK” is typed in. Hit enter to the Sort Order and Disposition screens. Make selections and enter to display report.
Printing Reports
Example—AIS Vehicles by Location

Report requirements: Print a list of vehicles in “AIS” status located in Ninilchik.

1. In this example, the report “Vehicle List” report has been selected. The Record selection screen will default as shown. At row 5, Vehicle Status, place your cursor in the center column. When you scan, the options will appear. Select “EQ” or enter the text “EQ” for equals.

2. Enter in the Vehicle Status “AIS”. Remember, you are asking for assigned vehicles.

3. At the Mgr Name, scan to Jon’s name.
Printing the PM Report

Select F9) PM Report

Select the type of report you want
Standard or Summary by selecting the appropriate Function key

Enter the PM Date requirements
Printing PM Reports

At the Record Selection Screen, select any number of parameters.

To print for your specific shop, change the following:
Scroll down to line 8 and change the text in the center to “EQ”. Enter “VA” to specify that only shop code “VA” will be displayed.

Change any of the print options or leave blank for the defaults.
Preventive Maintenance

Changing Next PM Date

Prior to changing a PM Date, determine new date desired. Foreman only have the option of deferring a PM 6 months out. If further delay is needed, contact the SEF District Manager and the EMS System Administrator for instructions.

1. At the Foreman’s Menu, select F5), “PM”

2. At the Preventive Maintenance Menu, select F1); “Asset Inspections”

3. Enter the Asset Number you would like to review and hit enter to display.

4. Once displayed, select F12 in order to be in “Change” mode. The field named “Nxt PM Date” is available to be changed to the new date. A deferral code is required—located at the bottom left section.

You will be required to enter a deferral code.

Ensure you are in “Change”