State of Alaska
Department of Transportation & Public Facilities

Statewide Equipment Fleet
Equipment Management System
GUI USER GUIDE

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EMS GUI User Guide

Part I: The Basics

Introduction

This document provides information pertaining to the GUI Desktop Client (Graphical User Interface) and navigational aids. Questions and recommendations for this manual should be directed to Sue Smith, Anchorage Statewide Equipment Fleet (SEF) , 269-0790; susan.smith@alaska.gov.

Contacts

EMS Administrator –	-provides statewide user support and System Administration for EMS software
Kerry Harper - EMS Systems Analyst and Programmer	-provides analysis and system programming for EMS
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Diana Rotkis – Statewide Equipment Fleet Manager – oversees entire fleet management

This guide is not intended to replace any policies or procedures currently established. Examples are intended for the purpose of software training only. Policies and procedures can be found at the SEF website: http://www.dot.state.ak.us/sef/index.shtml.

This guide and others can be found at the EMS website: http://www.dot.state.ak.us/sef/ems.shtml. Some examples are provided in this guide. However, based on the types of information different users require, additional position specific "Quick Guides" can be found at the EMS website.

Prerequisites

Prior to attending this training, user's must set-up their log-on credentials for EMS. The EMS Access Form is available on the SEF website: http://www.dot.state.ak.us/sef/ems.shtml. Downloads and installation instructions for the software are located on the SEF website: http://www.dot.state.ak.us/sef/downloads.shtml . The version of the software used by the majority of the State is known as the Appx Desktop Client. The Desktop Client was developed to allow users a "point and click" version of accessing the software.

System Overview

EMS stands for Equipment Management System. Most industries and large private sector companies have computerized systems to track their assets and inventory.

The State of Alaska uses EMS for the State Equipment Fleet and is used to identify vehicles and equipment, track costs, bill customers, maintain inventory, calculate rates, and store historical information about our equipment. This tracking also provides cost information for budgeting and forecasting.

EMS data is divided into several main areas:

Asset Management	Work Orders
Fuel	Time Posting
Parts inventory	Billing

Menus have been developed for users depending on their job descriptions. Menus are as follows: Accounting Staff, Foremen/Mgrs/ and Superintendents, Office Manager, Parts Managers, and a General Inquiry Menu.

For every Menu, additional lower menus are available that supply additional information.

Navigation: Toolbars and Icons

The following icons, or **combinations of them**, will appear on the majority of the screens on the upper left side.

Be aware that certain icons may be disabled when the associated action is not available. For example, if you are running an input function that only allows the display of record information, i.e., the user cannot add, change or delete records. The Add, Change and Delete icons will be dimmed and not accessible to the user (clicking on the icon will have no effect).

Toolbar

| E N T E R | C A N C E L | A D D M O D E | E D I T | I N Q U I R E | D E L E T E | CONFIRM DELETEE |
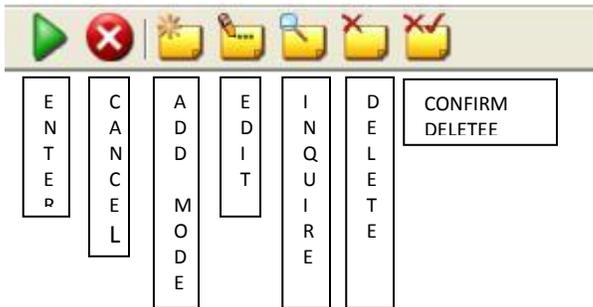
 ENTER   INQUIRE MODE

 CANCEL   DELETE MODE

 ADD MODE   CONFIRM DELETE

 CHANGE MODE
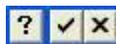
Input Image

These buttons, or a **combination of them**, will appear on each input image at the upper right side of the screen. If they are dimmed, the buttons are not available for selection.

     HELP   (click Help icon, then click on field or Option button for text)

     ENTER

     END

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<u>Report Tool bar</u>

The Report Tool bar provides the user with various navigational aids while displaying the report on-line.

Pan to Left Margin

Pan to Left Margin

Pan Screen Left 1 block

Pan Screen Left 1 character

Pan Screen Right 1 character

Pan Screen Right 1 block

Pan to Right Margin

Scroll to Top of Current Page

Scroll Up 1 block

Scroll Up 1 character

Scroll Down 1 character

Scroll Down 1 block

Scroll to Bottom of Current Page

Search (allows user to enter page number or text string)
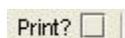
Allows the user to toggle the Print? flag from Y to N.

Close the Report Viewer (return to EMS menu and process report based on Disposition screen settings).

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Function Key Mapping

Function	Key or Key Combination
Field Help	F1
Option Help	Ctrl + F1
Scan	F2
Select Access Path	F3
Set Item Attributes	Ctrl + F3
Previous Image	F4
Next Record	F5
End	F8 or Esc or Ctrl + E
Cancel	Ctrl + F8 or Ctrl + Esc
Add Mode	F9
Delete Mode	F10
Confirm Delete	Ctrl + F10
Inquire Mode	F11
Change Mode	F12
Move To End of Item	End
Move to Begin of Item	Home
Show Messages	Ctrl + M
Page Up	Page Up
Page Down	Page Down
Scroll Rpt to First Page	Ctrl + Page Up
Scroll Rpt to Last Page	Ctrl + Page Down
Scroll Rpt Up 1 Line	Alt + Page Up
Scroll Rpt Down 1 Line	Alt + Page Down
Pan Rpt Left/Right 1 Cell	Shift + Arrow Key (← or →)
Pan Rpt Left/Right 1 Block	Ctrl + Arrow Key (← or →)
Pan Rpt to Left/Right Margin	Alt + Arrow Key (← or →)
Enter	Enter
Tab	Tab
Back Tab	Shift + Tab
Copy	Ctrl + C
Cut	Ctrl + X
Paste	Ctrl + V

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Customizing your Desktop Client

The user has the ability to modify various settings and presentation style associated with the Appx Desktop Client (ADC). The ADC is a program that resides on your PC or notebook (laptop) computer. It is used to establish a graphical (point & click) user session with EMS.

Modifications to the ADC settings <u>must</u> be made prior to establishing a session with EMS. Once the ADC is running (you are in EMS), changes to the ADC settings have no effect. Changes to the ADC are made from the *Appx Client Login* dialog box; this is the window that is displayed when you run the ADC.

To make changes, simply click on the *Options* tab.

Two types of modifications are currently available: 1) GUI Look (Presentation Style) and 2) Advanced settings.

Presentation Styles

The user can choose from the six available options; Appx is the default setting. Simply click on the desired style, then click on the *Remote* tab to complete the login process.

Some of the styles are very similar and it may be difficult to discern the differences. You will have to experiment and decide which style you like. Microsoft Windows settings may also affect the ADC presentation.

Advances Options

To change other settings, click on the *Advanced* button in the *Options* tab. You will be presented with a number of settings that control the ADC. **It is highly recommended that you <u>not</u> modify most of these settings.**

The only setting you may wish to experiment with is the *Font Size* (located in *Startup* section) – increasing the size will enlarge the ADC window, decreasing the size will reduce the size of the ADC window.

To change the Font Size, either press Page Down and Page Up keys or click on the scroll bar located on the right-hand margin of the *Client Preferences* dialog. Continue to scroll until you locate the *Startup* section. Position the mouse pointer on the Value column of the Font Size field and double-click the left-mouse button. The field should be modifiable. Enter the desired value and press Enter key.

After you have completed your changes, click on the located in the top right-hand corner of the *Client Preferences* dialog. Then click on the *Remote* tab to complete the login process.

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User Menus

Menus are assigned to EMS users based on their job descriptions. Examples follow for the Foremen/Managers/Superintendents Menu, Office and Accounting Staff. If you are not able to obtain the information you need, please call EMS support. Menus can be modified if required.

Accessing the System

Logging On

1. Using your mouse, Select Appx Icon	

2. Enter your Login ID: your SOA employee number preceded by a "u*"*
 	
3. Enter your Password
 	
    ****Server should default to *"viper.dot.state.ak.us"*
    ****Server Port should default to *"8060"*	

4. Select *"Connect".* The Opening Screen will display. The Database will default and show "*SEF".* Select "*Enter"* to access additional menu. Menus are assigned to EMS users based on their job descriptions. The example here is for the Foremen/Managers/Superintendents Menu.	
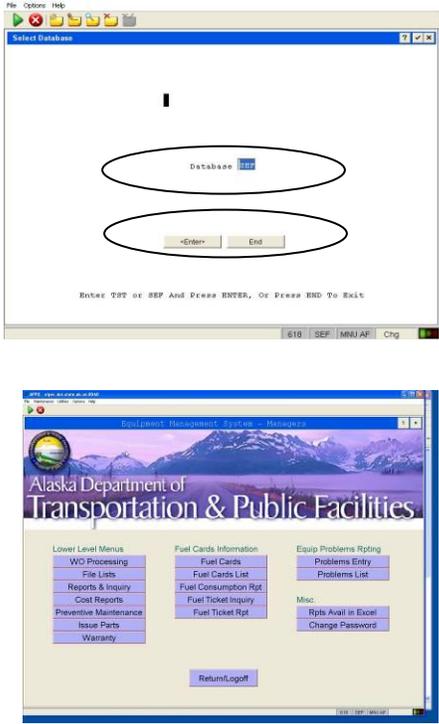
Logging Off

1. When logging off EMS, it is important to follow the *"Exit"* buttons. An example from the Inquiry Users Menu. The Exit button is located at the bottom.	**1**
2. An example from the Accounting Users Menu. The Exit button is located at the bottom.	**2**
3. Exit or Logoff until you reach the main screen. At this point, when you select "End", you have properly ended your session.	**3**
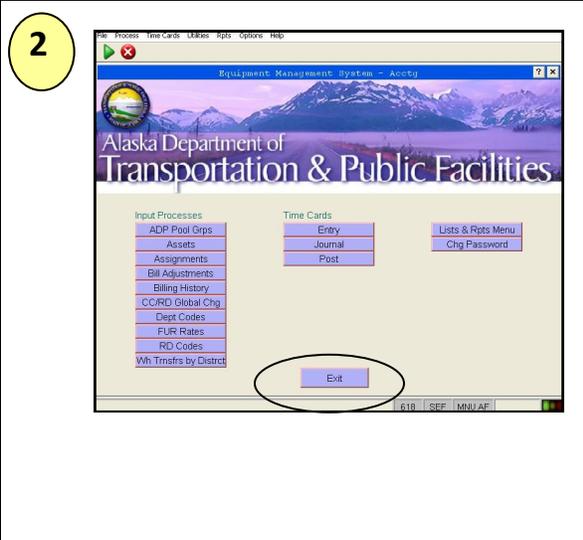
Part II: Database Basics

Definitions

Asset Numbers

Asset Numbers, Equipment Numbers and Vehicle Numbers are unique numbers assigned to equipment. Many of us use the three terms interchangeably. We find this useful in confusing most of our customers. Asset Numbers is the desired term as it correlates to the fields within EMS. Asset numbers are assigned regardless if the item is a Police vehicle, Plow truck , or Farm tractor.

Shop Codes

Shop Codes and Location Codes are assigned to the geographic location of the shop where the Asset will be serviced.

Financial Codes

Normally refer to the Collocation Codes assigned to each Asset.

Specification Class Code (Spc Class)

A classification assigned to similar equipment for establishing work management protocols.

Bill Class

A classification assigned to similar equipment for establishing billing.

Bill Status

A method to determine what charges an Asset will receive based on the maintenance service a customer selects, i.e. W07, NN.

Billing Life

The expected life, in years, of an Asset. The Bill Status along with the Billing Life combine to establish replacement rates for the equipment.

Database Fields

Many of the terms used above are incorporated into the database as fields. Database fields are included into multiple tables and are integrated into multiple panels that you may query. A field has certain defining characteristics.
> Name: every field has a name that uniquely identifies the field within a table.
> Data type: determine the information to be stored, i.e. dates, currency, text.
> Size: how many characters are stored, how much storage space is to set aside set aside for each value.
> Properties: defines multiple attributes of the field such as formatting.

Relational Database

Simply put, this term is used to describe a database that relates to multiple areas. The database fields are linked to each other within the system programming. In EMS, the Asset Number could be considered one of the core fields. The Asset Number relates to multiple areas such as work orders, parts issues, and billing documents to name a few. The goal is to extract the information into something useful for analysis and forecasting.

Reports

Reports are a product of the fields within a relational database. Once the fields are understood, users can identify the requirements for their reporting. Reports represent a snapshot in time of the information that has been extracted.   Reports allow users to customize their information into data that is useful for making business decisions.

Part III: Using EMS

Finding Information

Inquiring Asset Information

Based on your menu, select the Asset Menu.
In this example of the Accounting Menu, the Asset Menu is the second button.

After the Asset screen is displayed, either enter the Asset number, select the binoculars to search, or select F2 to scan the list.

In this example, Asset 35249 information has been displayed.