



OMS EQUIPMENT USER GUIDE For Field Personnel

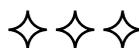


DEPARTMENT OF HIGHWAYS
Division of Maintenance
Revision June 2012



 EQUIPMENT USER GUIDE FOR FIELD PERSONNEL	Chapter	INDEXES
	Subject	Table of Contents

00	INDEXES	
01	Table of Contents	11/10
02	List of Figures	11/10
100	INTRODUCTION	
101	Design of This Manual	11/10
102	Overview	11/10
103	Definition of Terms	11/10
200	EQUIPMENT MANAGEMENT MODULE: SETUP/INVENTORY MENU OPTIONS	
201	Equipment Inventory Window	11/10
	201-01 Fueling	11/10
	201-02 Repair History	11/10
	201-03 Transfer History	11/10
300	EQUIPMENT MANAGEMENT MODULE: REPAIR MENU OPTIONS	
301	Overview	11/10
302	Issue Window (Internal Repair Order)	11/10
303	Progress Window	11/10
304	Completion Window	11/10
305	Issue Window (External Repair Order)	11/10
400	MATERIAL SALES TO OUTSIDE AGENCIES	
401	Work Orders	06/12



 <p>EQUIPMENT USER GUIDE FOR FIELD PERSONNEL</p>	Chapter	INDEXES
	Subject	List of Figures

**200 EQUIPMENT MANAGEMENT MODULE:
SETUP/INVENTORY MENU OPTIONS**

Figure 201-1: Equipment Inventory Window: Inventory Tab.....	11/10
Figure 201-01-1: Equipment Inventory Window: Fueling Tab	11/10
Figure 201-02-1: Equipment Inventory Window: Repair History Tab	11/10
Figure 201-03-1: Equipment Inventory Window: Transfer History Tab	11/10

**300 EQUIPMENT MANAGEMENT MODULE:
REPAIR MENU OPTIONS**

Figure 302-1: Access to Issue Window	11/10
Figure 302-2: Insert Repair Work Order	11/10
Figure 302-3: Explorer User Prompt Pop-up Window.....	11/10
Figure 302-4: Activities Sub-Window.....	11/10
Figure 303-1: Access to Progress Window	11/10
Figure 303-2: Employees Short List: Labor Tab	11/10
Figure 303-3: Material Tab	11/10
Figure 303-4: Direct Costs Tab	11/10
Figure 304-1: Costs and Accomplishments Sub-Window	11/10
Figure 304-2: Repair Orders Sub-Window	11/10



 <p>EQUIPMENT USER GUIDE <i>FOR FIELD PERSONNEL</i></p>	Chapter
	INTRODUCTION
	Subject
	Design of This Manual

Organization & Numbering

Chapter Title—the subject matter in the manual is divided into chapters. The chapter title appears in the upper right-hand corner of the first page of a subject and in the upper left-hand corner of any subsequent page.

Subject Title—the title of a subject appears in the upper right-hand corner of the first page of a subject and in the upper left-hand corner of any subsequent page.

“EQP” Prefix—preceding each subject number, this prefix stands for the manual title *Equipment User Guide for Field Personnel*.

Date—the latest issuance date of a subject appears at the bottom of each page of the subject. This date agrees with the latest issuance date shown for the subject in the Table of Contents ().

Page Numbering—each subject has its own page numbering, which appears at the bottom of each page.

Locating Information

Two indexes appear at the front of the manual, and one index appears at the back:

- ◆ **Table of Contents**—this index at the front lists the titles of the manual’s chapters and their subjects, as well as other information, in numerical order. It includes the latest issuance dates of all the subjects. As the manual matures, these dates may change.

**Locating
Information (Cont)**

- ◆ List of Figures—this index at the front lists the titles of the figures referenced in the manual. It includes the latest issuance dates of all the subjects. As the manual matures, these dates may change.

**Cross References
In Manual**

Subject Numbers within Narrative—a subject number within the narrative on a page directs the user to more information about the subject.

Questions

Who to Contact—for answers to questions about the contents of the manual and copies, please contact:

Operations and Pavement Management Branch
Division of Maintenance
Transportation Cabinet Office Building
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 <p>EQUIPMENT USER GUIDE FOR FIELD PERSONNEL</p>	Chapter	INTRODUCTION
	Subject	Overview

Overview

The Setup/Inventory and Repair Menus provide the capability to track equipment inventory, servicing, and fueling. They also provide integrated capabilities to manage a large and varied inventory of maintenance equipment. Some of the capabilities include maintenance and repair, processing of fuel, and tracking of licensing and registration details for each piece of equipment in the inventory.

Equipment service or repair is handled with interactive tools at the garage level and is integrated with the central equipment inventory database and management module. This module resides at the central office or district level depending on agency organization. Service information is entered and maintained for each piece of equipment in the inventory (excludes Fleet vehicle repairs since June 1, 2010). Service information is immediately made available to responsible personnel. This assists with scheduling equipment usage and maintenance on individual work orders.

The Setup/Inventory and Repair Menus manage equipment loans or rentals and confirm that the user will fulfill a request made by another organization to borrow equipment. This is accomplished within the **Equipment Transfer/Lease Window** where the system also allows for the re-assignment of equipment once the borrowed equipment is returned.



 <p>EQUIPMENT USER GUIDE FOR FIELD PERSONNEL</p>	Chapter
	INTRODUCTION
	Subject
	Definition of Terms

Equipment Class Codes

A class code is a name given to a group of equipment that is similar. Examples of Class Codes are “1 Ton Crew Cab” or “Compact SUV 4WD.” Keep in mind that class codes aren’t actual pieces of equipment. Instead, they should be considered categories of equipment.

Equipment Name

Equipment name is a number given to an actual piece of equipment. It is different from a class code in that it describes a specific piece of equipment rather than a broad group.

Short List

The **Short List Sub-Window** displays the short list of employees, materials, or equipment defined for your management unit. This may only be a subset of all employees, materials, or equipment available in your management unit. Typically, items contained in this short list will be those that will be assigned to work orders routinely. Items that do not put any time towards maintenance work orders may be excluded from the short list because they will not be worked with on a daily basis. Timekeepers may edit this list at any time.

Day card

A day card is part of a work order. Whenever material, equipment, or labor hours are used on a project, those items must be charged to the work order for that project as a day card.





**EQUIPMENT
USER GUIDE
FOR FIELD PERSONNEL**

Chapter

EQUIPMENT MANAGEMENT MODULE:
SETUP/INVENTORY MENU OPTIONS

Subject

Equipment Inventory Window

Overview

The **Equipment Inventory Window** is mainly used to view equipment details, transfer history, and maintenance history.

Each piece of equipment is viewed through the **Equipment Inventory Window**. Each specific piece of equipment is associated by general equipment types defined by KYTC. The **Equipment Inventory Window** displays equipment details including description, make, model, year, warranty expiration date, routine service frequency, special service frequencies, and a number of other agency-defined variables.

The **Equipment Inventory Window** provides the definition, maintenance, editing and reporting of the equipment inventory on a piece-by-piece basis. The **Equipment Inventory Window** has six tabs: Inventory, Warranties, Accessories, Fueling, Repair History, and Transfer History. We will look at the Inventory, Fueling, Repair History, and Transfer History tabs in more detail.

- **Inventory** - Shows all inventory data fields for equipment or vehicles that your management unit owns.
- **Warranties** - Displays any warranties related to specific piece of equipment.
- **Accessories** - Shows any accessories that may have been equipped on a specific piece of equipment.
- **Fueling** - This window contains all fuel dates, costs, and quantities.
- **Repair History** - This window shows all repair performed on a specific piece of equipment.

Overview
 (Cont)

- **Transfer History** - This window shows all transfers for each specific piece of equipment.

FIGURE 201-1: Equipment Inventory Window: Inventory Tab

* Equipment Name	* Equip Class Code	* Equipment Status	Tank Replacement Date
0000024	TRUCK 1 TON CREW CAB	AVAL	
0000034	TRUCK 1 TON CREW CAB	AVAL	
0000156	TRUCK 1 TON UTILITY	AVAL	
0008973	TRUCK 1 TON UTILITY	AVAL	
0009193	TRUCK 1 TON UTILITY	AVAL	
0009207	TRUCK 1.5 TON FLATBED	AVAL	
0009369	TRUCK 1 TON UTILITY	AVAL	
0009370	TRUCK 1 TON UTILITY	AVAL	
0009444	TRUCK 1 TON CARGO VA	AVAL	
0009489	TRUCK AERIAL BOOM UP	AVAL	
0009490	TRUCK BOX VAN	AVAL	
0009573	TRUCK 1 TON UTILITY	AVAL	
0009757	TRUCK 1 TON UTILITY	AVAL	
0009768	TRUCK 1 TON UTILITY	AVAL	
0009831	TRUCK 1 TON UTILITY	AVAL	

Equipment needs to be purchased into the system and transferred to the appropriate location before that piece of equipment can be seen in the **Equipment Inventory Window**.



 EQUIPMENT USER GUIDE FOR FIELD PERSONNEL	Chapter
	EQUIPMENT MANAGEMENT MODULE: SETUP/INVENTORY MENU OPTIONS
	Subject
	Fueling

Procedure

1. Log into your management unit and access *Equipment Management>Setup/Inventory>Equipment Inventory>Inventory*.
2. Click on the **Inventory** tab.
3. Right-click within the **Inventory Window** and select *Filter* (utilizing the filter option greatly increase your ability to locate equipment quickly and easily).
4. From the pop-up window, click on the “Equip Class Code” line in the left hand sub-window.
5. On the upper right hand, select *in list* from the Select Filter Type drop-down menu.
6. The Class Code Parent Tree will appear in the lower right hand sub-window.
7. Click on the class code for the equipment type you want to view fueling details (notice the  icon) and click “Ok”.
8. Locate and click on the particular equipment of interest and click on the **Fueling** tab to view fueling information associated with the particular vehicle you had selected.
9. Fueling data will be displayed by transaction starting with the most recent, to view further information click on the > to scroll through additional transactions.

Fueling

Procedure
(Cont)

FIGURE 201-01-1: Equipment Inventory Window: Fueling Tab

Roadway		Equipment Management		Network	
Utilities		Setup/Inventory		Repair Tools Reports	
Setup/Inventory > Equipment Inventory > Inventory					
Inventory		Warranties		Accessories	
Fueling		Repair Histor			
635 pages (635 rows)					
* Fuel Date	12/18/2009				
* Fuel amount	17				
Fuel cost (\$)	\$40.82				
Current Meter	239147				
Credit Card	4053261455				
* Fueling Source	From credit card company				
* Fuel Product Code	Diesel				
Comments					
User Update	IMPORT15				
Date Update	2/26/2010				

NOTE: If you fuel any equipment or rental equipment from a 98 gallon tank you will need to manually insert those transactions from the fueling tab by using the right click insert functionality. If fueling Division of Equipment be sure to select the appropriate tank number from the *Fueling Source* drop down. (From 98 gallon tank is no longer an appropriate fueling source for tanks with equipment names.)

When fueling rental equipment insert the fueling transaction under the fueling tab for the tank number that was used.



 EQUIPMENT USER GUIDE FOR FIELD PERSONNEL	Chapter EQUIPMENT MANAGEMENT MODULE: SETUP/INVENTORY MENU OPTIONS
	Subject Repair History

Procedure

1. Log into your management unit and access *Equipment Management>Setup/Inventory>Equipment Inventory>Inventory*.
2. Click on the **Inventory** tab.
3. Right-click in the **Inventory Window** and select *Filter*.
4. From the pop-up window, click on the “Assigned Mgmt Unit” line in the left hand sub-window.
5. On the upper right hand, select “*in list*” from the Select Filter Type drop-down menu.
6. The **Mgmt. Unit Parent Tree** will appear in the lower right hand sub-window.
7. Click in the select checkbox next to the management unit you are logged into (notice the icon) and click “Ok”.
8. Highlight (click on) the line for the piece of equipment who’s repair history you wish to view.
9. Click on the **Repair History** tab to view all repair order information for the selected equipment.

**Procedure
 (Cont)**

FIGURE 201-02-1: Equipment Inventory Window: Repair History Tab

Roadway Equipment Management Network Resources System							
Utilities Setup/Inventory Repair Tools Reports							
Setup/Inventory > Equipment Inventory > Inventory							
Inventory	Warranties	Accessories	Fueling	Repair History	Transfer History		
<< < 1 Go > >> 8 pages (162 rows)							
Project	Management Unit	Status	Start Date	Completi...	Repair Name	Current Meter	Activity
Eq RO:909468	EQ C-1 Garage	Completed	10/4/1999	10/4/1999	EQ C-1999-909468	1	126 Miscellaneous (hours)
Eq RO:909470	EQ C-1 Garage	Completed	10/14/1999	10/14/1999	EQ C-1999-909470	25000	126 Miscellaneous (hours)
Eq RO:909469	EQ C-1 Garage	Completed	10/15/1999	10/15/1999	EQ C-1999-909469	278	101 Tires/Tubes/Wheels (hours)
Eq RO:909475	D8 EQUIPMENT	Completed	6/7/2000	6/7/2000	D8 E-2000-909475	16749	100 Preventive Maintenance (hours)
Eq RO:909474	D8 EQUIPMENT	Completed	6/7/2000	6/7/2000	D8 E-2000-909474	16749	100 Preventive Maintenance (hours)
Eq RO:909473	D8 EQUIPMENT	Completed	6/7/2000	6/7/2000	D8 E-2000-909473	16749	106 Cooling System (hours)
Eq RO:909472	D8 EQUIPMENT	Completed	6/7/2000	6/7/2000	D8 E-2000-909472	16749	103 Engine (hours)
Eq RO:909471	EQ C-1 Garage	Completed	6/7/2000	6/7/2000	EQ C-2000-909471	1	126 Miscellaneous (hours)
Eq RO:909478	EQ C-1 Garage	Completed	8/7/2000	8/7/2000	EQ C-2000-909478	10120	100 Preventive Maintenance (hours)
Eq RO:909476	EQ C-1 Garage	Completed	8/7/2000	8/7/2000	EQ C-2000-909476	10120	100 Preventive Maintenance (hours)
Eq RO:909477	EQ C-1 Garage	Completed	8/7/2000	8/7/2000	EQ C-2000-909477	10120	100 Preventive Maintenance (hours)



 <p>EQUIPMENT USER GUIDE FOR FIELD PERSONNEL</p>	Chapter
	EQUIPMENT MANAGEMENT MODULE: SETUP/INVENTORY MENU OPTIONS
	Subject
	Transfer History

Procedure

1. Log into your management unit and access *Equipment Management>Setup/Inventory>Equipment Inventory>Inventory*.
2. Click on the **Inventory** tab.
3. Right-click on the “Equipment Name” column and select *Filter*.
4. From the pop-up window, click on the “Equipment Name” line in the left hand sub-window.
5. On the upper right hand window, select “=” from the Select Filter Type drop-down menu.
6. A pop up box will appear, click in the box and type the Equipment Name for the equipment of interest and click “OK” (this should return 1 vehicle only).
7. Click on the **Transfer History** tab to view all transfer information for the filtered/selected equipment.

FIGURE 201-03-1: Equipment Inventory Window: Transfer History Tab

Roadway	Equipment Management	Network	Resources	System	
Utilities	Setup/Inventory	Repair	Tools	Reports	
Setup/Inventory > Equipment Inventory > Inventory					
Inventory	Warranties	Accessories	Fueling	Repair History	Transfer History
<< 1 Go >> 1 pages (1 rows)					
Start Date	Final Date	Mgmt. Unit Assigned	County Where Located	District Assigned	Crew Number
6/24/2002	6/24/2052			00	150



 EQUIPMENT USER GUIDE FOR FIELD PERSONNEL	Chapter EQUIPMENT MANAGEMENT MODULE: REPAIR MENU OPTIONS
	Subject Overview

Overview

The Repair Menu for equipment is mainly used for creating, updating and closing repair orders.

By the completion of this chapter, you will be able to:

- Create an “in-house” repair order
- Create an “external” repair order
- Process repair orders
- Close repair orders

There are four options within the Repair Menu: Issue, Progress, Commercial and Completion. We’ll look at the Issue, Progress and Completion options and talk about their functions.

Repair orders may be created for in-house garages or for work performed by external garages. A KYTC garage performing repair work initiates an in-house repair order. An external garage (Midas, Jiffy Lube) would perform repair work and the parts, labor, etc. would be initiated on an external repair order.

Both in-house and external repair orders will be demonstrated. First, we’ll look at issuing an in-house repair order.



 <p>EQUIPMENT USER GUIDE FOR FIELD PERSONNEL</p>	<p>Chapter</p> <p>EQUIPMENT MANAGEMENT MODULE: REPAIR MENU OPTIONS</p>
	<p>Subject</p> <p>Issue Window (Internal Repair Order)</p>

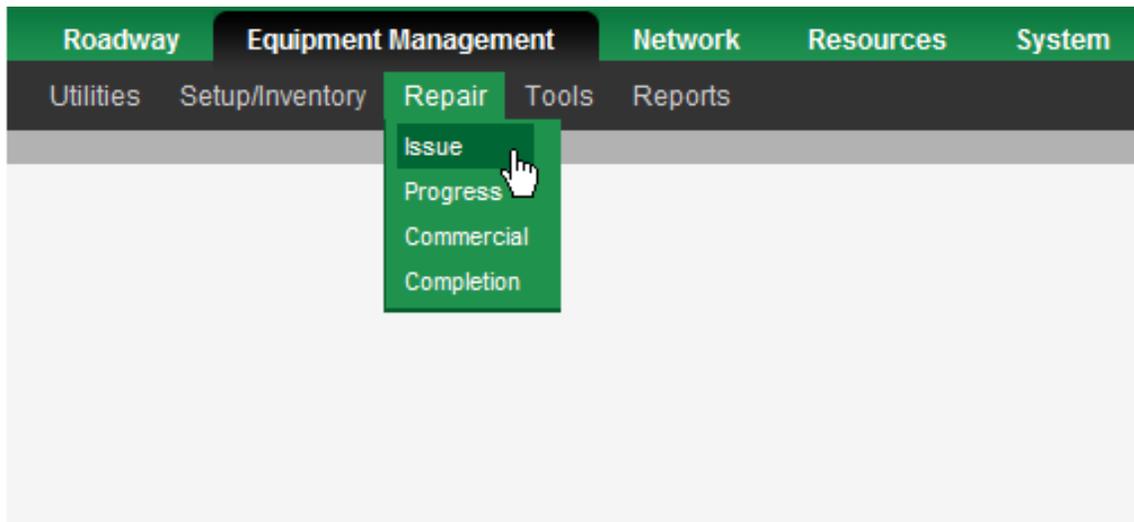
Scenario

A flat bed truck owned by your management unit was towed from the work site to one of your county garages because it wouldn't start. You receive the truck and begin processing a repair order.

Procedure

1. Log into your management unit in OMS and access *Equipment Management>Repair>Issue*.

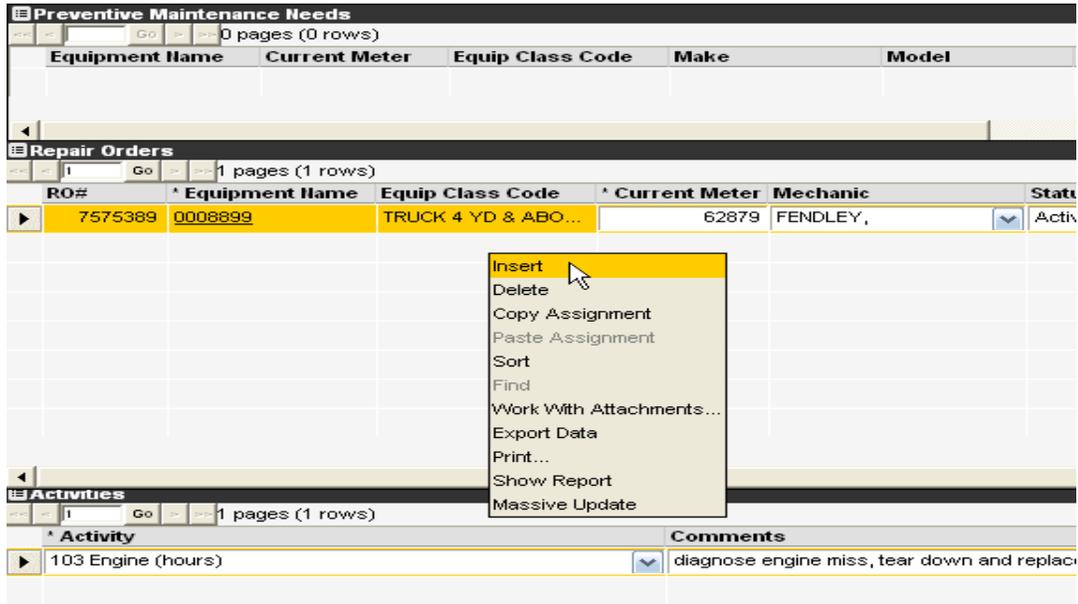
FIGURE 302-1: Access to Issue Window



2. Right-click in the **Repair Orders Sub-Window**.
3. Click "Insert".

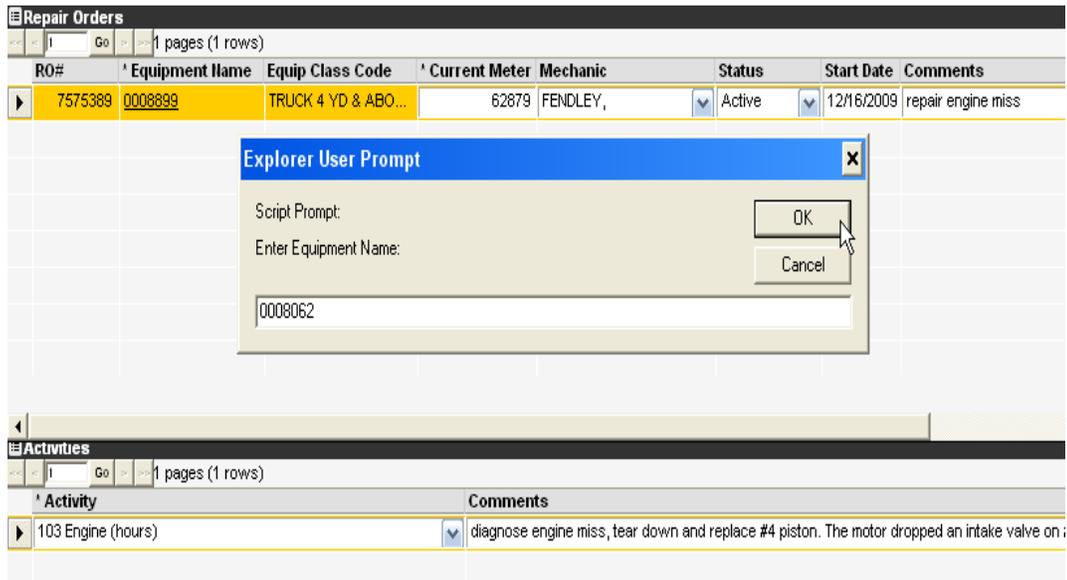
Procedure
(Cont)

FIGURE 302-2: Insert Repair Work Order



4. Enter the equipment name in the **Explorer User Prompt Pop-up Window** for the vehicle that needs repair.

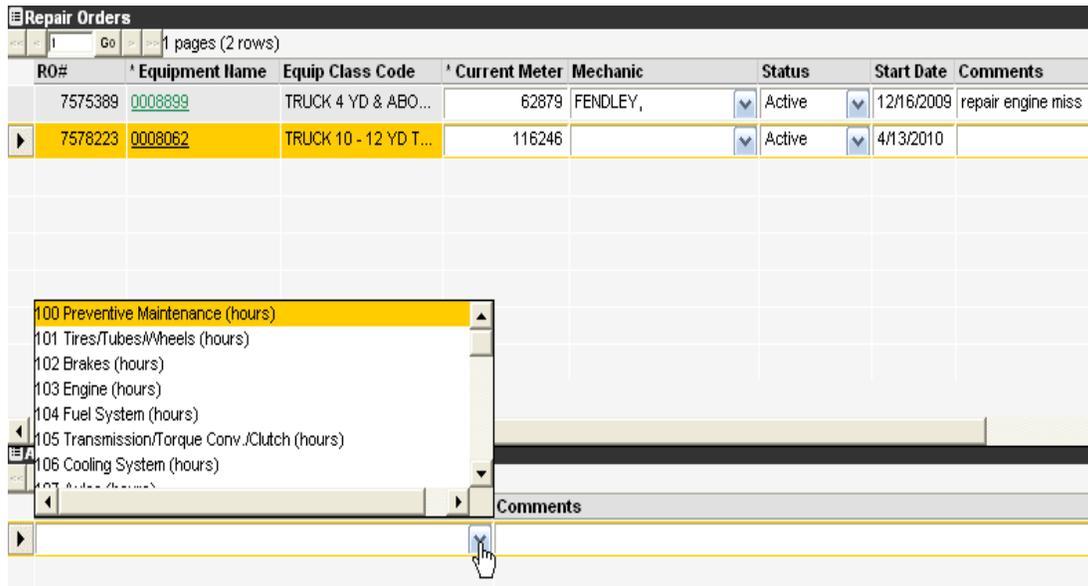
FIGURE 302-3: Explorer User Prompt Pop-up Window



**Procedure
(Cont)**

5. Repeat steps 2-4 to add any additional equipment in need of repair.
6. Input necessary information in the Mechanic, Status, and Comments fields for each repair order.
7. Ensure the correct repair order is highlighted in the **Repairs Sub-Window**.
8. Right-click in the **Activities Sub-Window**.
9. Click “Insert”.
10. Select appropriate activity from drop-down list.

FIGURE 302-4: Activities Sub-Window



11. Repeat steps 7-10 for each necessary activity.
12. Save .
13. Write down each equipment name and repair order number.
14. Exit the **Issue Window** .



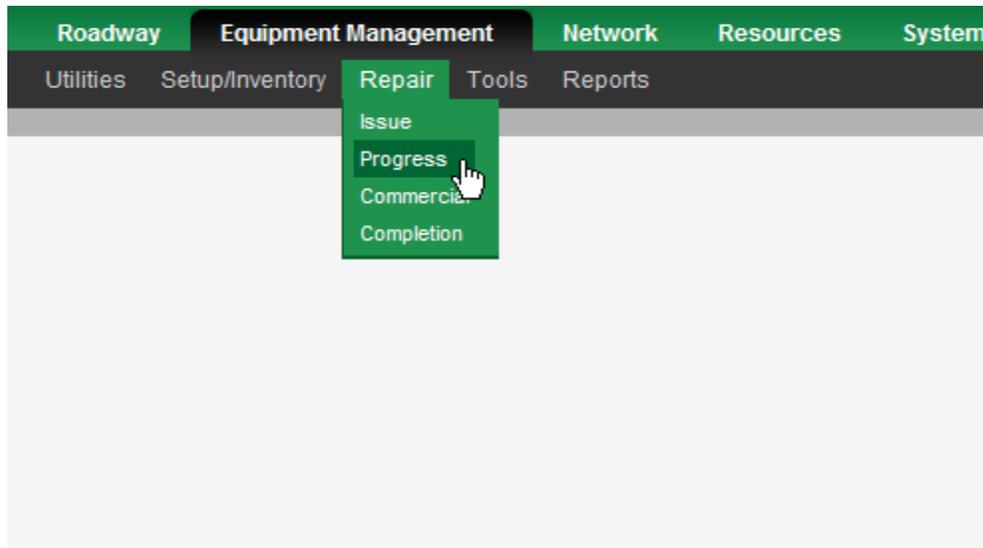
 <p>EQUIPMENT USER GUIDE FOR FIELD PERSONNEL</p>	<p>Chapter</p> <p>EQUIPMENT MANAGEMENT MODULE: REPAIR MENU OPTIONS</p>
	<p>Subject</p> <p>Progress Window</p>

Procedure

In this window, you will continue processing the repair order.

1. Access *Equipment Management*>*Repair*>*Progress*.

FIGURE 303-1: Access to Progress Window



2. Locate and select the repair order you just created.

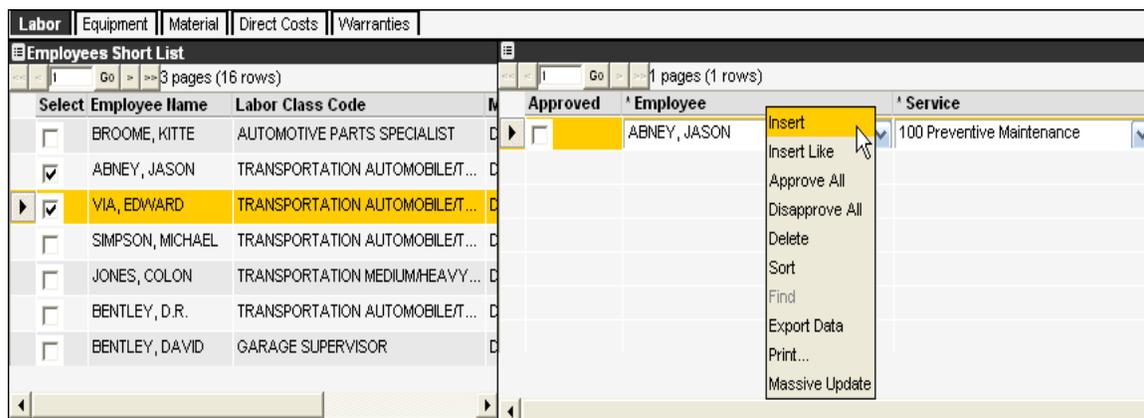
NOTE: If necessary, check the Odometer Change check box if the actual odometer is different from what is reported in the system.

3. In the **Employees Short List Sub-Window** (lower left hand), click on the **Labor** tab.
4. Check the “Select” box next to the employee performing the repair.

**Procedure
(Cont)**

5. In the lower right hand sub-window, right-click and select *Insert* to add an employee.
6. Repeat steps 4 and 5 to add additional employees assigned to the repair order.

FIGURE 303-2: Employees Short List: Labor Tab



7. Enter the necessary information in the Service, Employee, and Total Hours fields to complete the activity for each employee.
8. Check the “Approved” check box to accept the labor.
9. In the lower left hand sub-window, click on the **Material** tab.



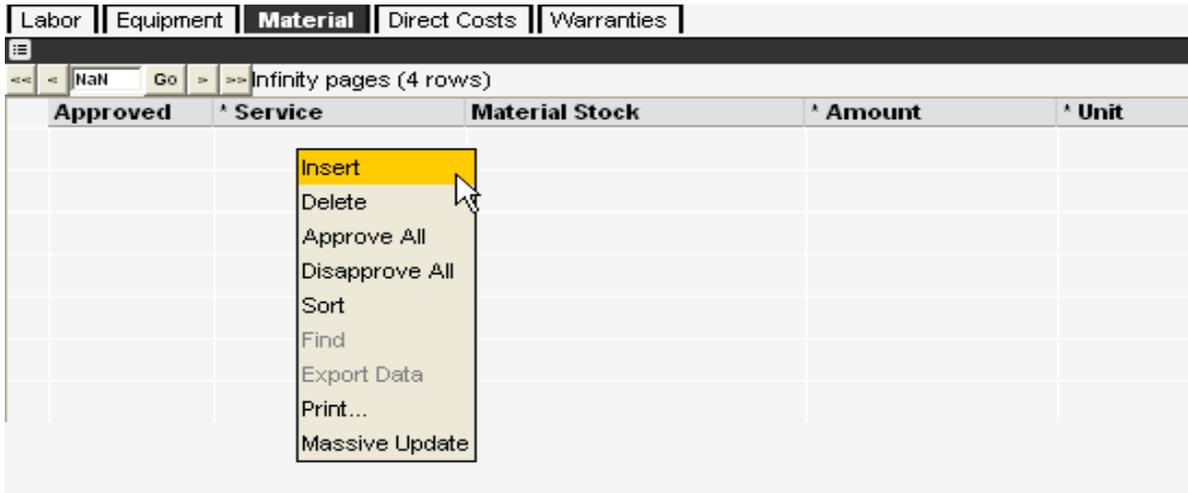
What if the materials I need are not displayed?

Go to *Equipment Management > Setup/ Inventory > Short List > Material*. All materials available for your Management Unit will be displayed. Click the check box next to the material you wish to add to your short list. Save and exit the window.

10. Right-click and select *Insert* to add material necessary for the repair order. Repeat step to add additional materials.

Procedure
(Cont)

FIGURE 303-3: Material Tab



11. Select the Service (activity) you want to assign materials.
12. Select Material Stock necessary for specific activity.
13. Click in the amount box and enter the number of units of material used on the selected activity.
14. Click on the “Approved” check box.
15. Repeat steps 10-14 for any additional materials.
16. Click on the **Direct Costs** tab in the lower left hand sub-window.
17. Right-click and select *Insert* for each direct cost accrued for this repair order.

FIGURE 303-4: Direct Costs Tab



**Procedure
(Cont)**

18. Enter all necessary information in the Repair Vendor, Comments, and Labor Cost fields for each direct cost accrued.

19. Click on the “Approved” check box to approve the direct costs.

20. In the **Repairs Sub-Window** (upper left hand), check the “Ready for Completion” box.

21. Save  and exit .



 <p>EQUIPMENT USER GUIDE FOR FIELD PERSONNEL</p>	<p>Chapter</p> <p>EQUIPMENT MANAGEMENT MODULE: REPAIR MENU OPTIONS</p>
	<p>Subject</p> <p>Completion Window</p>

Procedure

This is the final step in completing repair work on equipment.

1. Access *Equipment Management*>*Repair*>*Completion*.
2. Once all work is completed, check to make sure all day cards are correct for each activity in the lower left hand **Costs and Accomplishments Sub-Window**.

FIGURE 304-1: Costs and Accomplishments Sub-Window

Costs and Accomplishments						
Activity	DESCR	MIN DATE WORK	MAX DATE WORK	NOT APPROVED	Total Cost (\$)	Man Hour Used
▶ 100 Preventive Maintenanc...	Labor Day Cards	4/13/2010	4/13/2010	0	\$81.83	3
100 Preventive Maintenanc...	Material Day Cards	4/13/2010	4/13/2010	0	\$13.67	0
	Labor Direct Report	4/13/2010	4/13/2010	0	\$0.00	0
	Material Direct Report	4/13/2010	4/13/2010	0	\$13.13	0

3. In the **Repairs Sub-Window**, click the “Completed” check box to complete the repair order.

**Procedure
(Cont)**

FIGURE 304-2: Repair Orders Sub-Window

Completed	RO#	Ready For Completion	Equipment Name	Odometer Change	Old Odometer
<input checked="" type="checkbox"/>	7578223	<input checked="" type="checkbox"/>	<u>0008062</u>	<input type="checkbox"/>	

4. Save  and exit .



 EQUIPMENT USER GUIDE FOR FIELD PERSONNEL	Chapter EQUIPMENT MANAGEMENT MODULE: REPAIR MENU OPTIONS
	Subject Issue Window (External Repair Order)

Overview

The process for creating repair orders for work that is performed outside of an in-house garage, you would follow the steps for in-house repairs, except that you would enter all external work information (material and labor) in the **Direct Costs** tab. You would not enter anything in the **Material** or **Labor** tabs since the vendor is doing the labor and not using any of your materials.

Procedure

1. Access the *Equipment Management* module.
2. Create a repair order using previous steps.
3. Access *Equipment Management>Repair>Progress*.
4. Select the repair order to be processed.
5. Click on the **Direct Costs** tab in the lower left sub-window.
6. Right-click *Insert*. Enter the information regarding the external repair in the required fields. Enter comments about the work, including any PO# if desired. Save and Exit.
7. Follow steps outlined previously in **EQP-304** once all direct costs have been applied to the repair order.



 EQUIPMENT USER GUIDE <i>FOR FIELD PERSONNEL</i>	Chapter
	MATERIAL SALES TO OUTSIDE AGENCIES
	Subject
	Work Orders

Operations

In order to sell material from Traffic (FE04), Equipment (FK01) or Maintenance (FE01): There are two options to properly handle the inventory quantities and financial transactions. They are as follows:

1. Use the “Ask for Transfer from this Stock” functionality in the **Material Management Window** as it exists in OMS (which will move the inventory from the "transfer from" to the "transfer to" management unit). Since this transfer does not handle the accounting, an ITI/ITA document has to be generated in eMARS to move the money between the different agencies material overhead accounts; **OR**
2. Create a work order in OMS. The accounting string on the work order should specify where the material is being charged, ("sold to"). This will ensure the accounting information (the transaction) will be included in the MAT-05 interface as well as remove the material from the inventory of the crew that performed the work order. In order to properly add the material to the receiving crew, the receiving crew must purchase the material into their inventory (See Chapter 305-02, Purchases).

Contact your OMS Coordinator for assistance with this transaction.

