
 Chapter
6

Equipment Module

The Equipment Module is used to store information about your organization's assets. The equipment records historical data provides an ongoing mechanism for monitoring equipment costs. This Chapter describes how to use the Web Work Equipment module.

Table of Contents

6.1	OVERVIEW OF THE EQUIPMENT MODULE.....	3
6.1.1	ACCESSING THE EQUIPMENT MODULE	3
6.2	CREATING NEW EQUIPMENT RECORDS.....	4
6.2.1	CREATING EQUIPMENT RECORDS	4
6.2.2	MOBILE VERSUS FIXED EQUIPMENT.....	4
6.2.3	EQUIPMENT TYPE FIELDS	5
6.2.4	WARRANTY DATE FEATURE.....	6
6.2.5	SERIALIZED EQUIPMENT	7
6.2.6	ADDING SERIALIZED EQUIPMENT – DIRECTLY TO THE EQUIPMENT MODULE.....	7
6.2.7	ADDING SERIALIZED EQUIPMENT – BY PURCHASING IT.....	7
6.3	EQUIPMENT SPECIFICATIONS.....	9
6.3.1	ADDING EQUIPMENT SPECIFICATIONS	9
6.3.2	EDITING EQUIPMENT SPECIFICATIONS	11
6.3.3	SEARCHING SPECIFICATIONS	12
6.4	EQUIPMENT HIERARCHIES AND ASSEMBLIES.....	14
6.4.1	CREATING EQUIPMENT HIERARCHIES.....	14
6.4.2	VIEWING EQUIPMENT HIERARCHIES.....	15
6.5	USING EQUIPMENT PARTS LISTS.....	16
6.5.1	ADDING PARTS TO AN EQUIPMENT RECORD	16
6.5.2	EDITING PARTS LISTS	17
6.6	METER READINGS.....	18
6.6.1	VIEWING METER READINGS	18
6.6.2	TO ADD A METER READING:	19
6.7	MODIFYING EQUIPMENT RECORDS AND EQUIPMENT HISTORY.....	20
6.7.1	TO MODIFY AN EQUIPMENT RECORD	20
6.7.2	EQUIPMENT – MODIFICATION HISTORY.....	22

6.8	EQUIPMENT – PM LIST	23
6.8.1	VIEWING PM WORK ORDERS ASSOCIATED WITH AN EQUIPMENT RECORD.....	23
6.9	DEPRECIATION	24
6.9.1	SETUP TO DEPRECIATE EQUIPMENT.....	24
6.9.2	CHOOSING THE DEPRECIATION METHOD.....	24
6.9.3	CALCULATE DEPRECIATION IN WEB WORK	24
6.9.4	VIEW/EDIT DEPRECIATION HISTORY	26
6.10	DUPLICATING EQUIPMENT RECORDS	27
6.10.1	DUPLICATING EQUIPMENT RECORDS – EXAMPLE 1	28
6.11	DELETING EQUIPMENT RECORDS	29
6.11.1	TO DELETE AN EQUIPMENT RECORD:	29
6.12	RESET DOWNTIME	30
6.12.1	TO RESET YOUR DOWNTIME	30
6.13	PRINTING EQUIPMENT RECORDS	31
6.13.1	TO PRINT ONLY THE EQUIPMENT RECORD THAT IS OPEN ON THE SCREEN:	31
6.13.2	PRINTING MULTIPLE EQUIPMENT RECORDS	31
6.14	EQUIPMENT – REPORTS	32
6.15	MANAGE ROUTES	33
6.15.1	CREATE A NEW ROUTE.....	33
6.16	ROUTE READINGS	35
6.16.1	ENTERING ROUTE READINGS.....	35

6.1 Overview of the Equipment Module

The Equipment module is used to store information about a company's assets. All pertinent information relating to any piece(s) of equipment can be stored within this module.

6.1.1 Accessing the Equipment Module

- Go to the Menu Bar on the left hand side of the screen, click on the **Assets** Module Group to expand the menu tree and then click the **Equipment** Module.
- When you enter the Equipment module you will be defaulted to the Mode set in your Users Settings, either Query mode or Add New mode. An example of a screen in Query Mode is shown below:

The **Operations Resources Tools Help** drop down menus contain the various features available in the Equipment module. They will be explored further in this chapter.





Web Work includes “Help Files” for all fields. To access these help files, click on the field label. A popup window will open displaying help for the field selected.

6.2 Creating New Equipment Records

It is recommended that you create an Equipment record for each asset you wish to track. The Equipment record can then be thought of as the “file” that holds information pertaining to the asset. Please note, we will refer to Equipment and Assets interchangeably throughout this manual. They are one in the same. Once you have created an Equipment record it will become available to you in other modules, such as Work Orders.

6.2.1 Creating Equipment Records

To create a new Equipment Record:

- Click on the New icon  at the bottom right of the screen to enter into new mode.
- Enter information into the fields displayed on the screen. Note: Required fields are shaded blue, all others are optional fields. For more help on the specifics of each field, click the field label to launch the online field help.
- Click on the Save icon  at the bottom right hand side of the screen to save the Equipment Record.



The F12 key on your keyboard is a hot key and can be used to SAVE a record instead of clicking on the Save icon.

6.2.2 Mobile Versus Fixed Equipment

Equipment in Web Work must be defined as either “Mobile” or “Fixed”. You would set Equipment like an Air Handling Unit on a roof to Fixed. You would set Equipment like vehicles to mobile as they tend to have no fixed location.

- When creating Work Orders for Fixed Equipment, the Location field on the Work Order is set to the Location of the Equipment record and CANNOT be changed. You can only change the Location using the Modify Equipment feature explained in detail later in this chapter.
- When creating Work Orders for Mobile Equipment the Location field on the Work Order is defaulted to the Location of the Equipment record and CAN be changed.

6.2.3 Equipment Type Fields

The Equipment Type fields (commonly referred to as EQ Type fields) are made up of EQ Type, SubType1, SubType2, SubType3, SubType4, and SubType5. The EQ Type fields can be used to group similar Equipment records into categories that can later be used to query and report with. An example of Equipment Types might be pump, fan, and motor.

EQ Type fields can be used independently or in a hierarchy:

Independent: means that you use the fields just as any other field with validation. The fields work independent of one another.

Hierarchy: means that the fields are linked. The data entry of the first EQ Type field is the same as independent but then the choices for Sub Type 1 are limited by the entry made in the EQ Type field. The Sub Type 2 field choices become limited to the entry in the Sub Type 1 field and so on down to Sub Type 5. Setting the behavior of these fields is done in the Admin Module and is described in detail in the Admin Chapter under System Defaults Setup.

To add a new Sub Type:

- Click the Lookup icon beside the Sub Type field you want to add to.

SubType1 






- You should now see the screen as shown here only your data will be different.





- Click [New](#) to add the new Sub Type. The following screen should appear.

Select an Equipment Type - Microsoft Internet E...


Select an Equipment Type (Level=1)

Code	Description	
BIK	Bikes	
LEVELA	Trailers	
TRUCK	Trucks	
V	Cars	
VAN	Vans	

 
New Close

Done Local intranet

- Enter the new Type in the EQ Type field. This is generally a code of some sort.
- Enter a description for the code in the Description field.
- If you have set your Equipment Sub Types to hierarchal in the Admin Module you will need to fill in the Parent field to define which EQ Type code is the Parent to the new EQ Type you are entering. Note that the choices for Parents are limited to the EQ Types on the next level up.

- You can edit an existing EQ Type at anytime by retrieving it from the lookup list and clicking the edit icon  beside the record you want to edit.

Code	Description	
BIK	Bikes	
LEVELA	Trailers	
TRUCK	Trucks	
V	Cars	
VAN	Vans	

- Click here to edit the Code "VAN"

6.2.4 Warranty Date Feature

When a Warranty Date is entered on an Equipment record Web Work will warn the user when the Equipment is entered on a Work Order and the warranty period is not expired. The message you will receive is shown here.



6.2.5 Serialized Equipment

Equipment records can be set up so they are recognized and linked to Inventory Items. When this is done we call the Equipment "Serialized". A serialized Equipment record is defined by having its Item Number field populated. Serializing Equipment tightens up the control of the Equipment and makes for better auditing.

If you wish to use the Serialized Equipment feature you must first setup your Inventory Items. This will allow you to establish the link between the Equipment and its corresponding Item Number when the time comes.

New Serialized Equipment is purchased on a Purchase Order and received to stores where it can then be issued to the field. All steps are audited and recorded in the database. Unlike regular Equipment. Serialized Equipment can move in and out of Inventory Storerooms. For more information on receiving serialized equipment, see the Inventory chapter of this manual.

There are two methods to make an Equipment Record Serialized:

6.2.6 Adding Serialized Equipment – Directly to the Equipment Module

If the Inventory Item record has already been created in the Inventory module, you can create a new Equipment record as described earlier in this chapter and by filling in the Item Number field you create a Serialized Equipment record. This references the Equipment to Inventory Item. It is not mandatory but it is recommended that you also fill in the Serial Number field at the same time.

6.2.7 Adding Serialized Equipment – By Purchasing It

The other method is to add a new Serialized Equipment record is Purchase and Receive an Inventory Item that is set to Serialized. When the Item is Received you will be asked to fill in the Equipment number, Serial number and other pertinent fields to create and setup the new Serialized Equipment. For more on Purchasing and Receiving Serialized Inventory Items, see the Receiving Chapter.)



We recommend referencing the Equipment's actual Serial Number in the Serial Number field of the Equipment record rather than the Equipment number itself because it is possible to have two pieces of completely different Equipment with the same Serial Number. Serial numbers also tend to be quite long and could become cumbersome to use. The Serial Number can generally be queried in place of the Equipment number.

Operations Resources Tools Help **Inventory Module**

Main Specifications Where Used Vendors Show Open PO

Item Number **IN-55** **5 HP Motor GE 3450RPM 7/8" shaft 230V 56HZ**

Short Description Motor Electric Serialized Yes No

Category ELEC Issue Unit EACH Stock Item Yes No

Primary Vendor 1551 Vendor Part # 234245-9 Manufacturer HERMAN

SubType0 SubType1 SubType2

SubType3 SubType4 Markup Rate 0 %

	Storeroom	Aisle	Row	Bin	Vendor	Avg Price	Last Price	Qty Available
ISSUE ITEM	MASTER	1	22	3	1551	£243.8800	£243.8800	0
TOTAL								0

Operations Resources Tools Help **Equipment Module**

Main Specifications Hierarchy Parts List Meter Reading History PM List Depreciation

Equipment **000485** **5 HP Motor GE 3450RPM 7/8** Status OPERATING

Parent 000015 Compressor Operator

Location BLDG-A1 Building A1 Room 4

Item Number IN-55 Meter Reading Unit

Avg. Reading In (Interval) days Rate 0

Position Fixed Mobile

Operations Resources Tools Help **Equipment Module**

Main Specifications Hierarchy Parts List Meter Reading History PM List Depreciation

Equipment **000486** **5 HP Motor GE 3450RPM 7/8** Status OPERATING

Parent Compressor Operator JOHN

Location B2 Building 2 - Steve Jones Bldg Room 4

Item Number IN-55 Meter Reading Unit

Avg. Reading In (Interval) days Rate 0

Position Fixed Mobile

Above we illustrate the “one to many” relationship creating by linking the Item Number on the Equipment records back to the Item Number on the Inventory record. We have shown two Equipment records linked to the Inventory record by a common Item Number “IN-55.” You can have as many Equipment records linked to a single Inventory record as you wish.

Equipment

6.3 Equipment Specifications

Additional information about a piece of equipment can be added using the Equipment Specifications feature. This feature allows for adding an UNLIMITED number of user defined fields, called Attributes, pertaining to a piece of Equipment. The fields/attributes can be grouped into templates and applied to similar pieces of Equipment. You can later do searches on equipment specifications to find Equipment records with similar attributes.

A unique feature of Web Work is that these Attributes can also be used as Meters for taking readings and developing routes. By designating an Attribute to be a Meter you can take readings that can then be entered against the Meter to track Equipment Usage or other Measures. The Meter Readings can then be used to trigger Preventive Maintenance (PM) work. These Meters can, in addition, be designated as Palm Readings if you have the Palm Module to take Meter Readings. Please see the Palm Chapters for more on using Palm features.

6.3.1 Adding Equipment Specifications

To add Specifications to an Equipment record:

- Click on the Specification tab to access the Specifications screen as shown here.

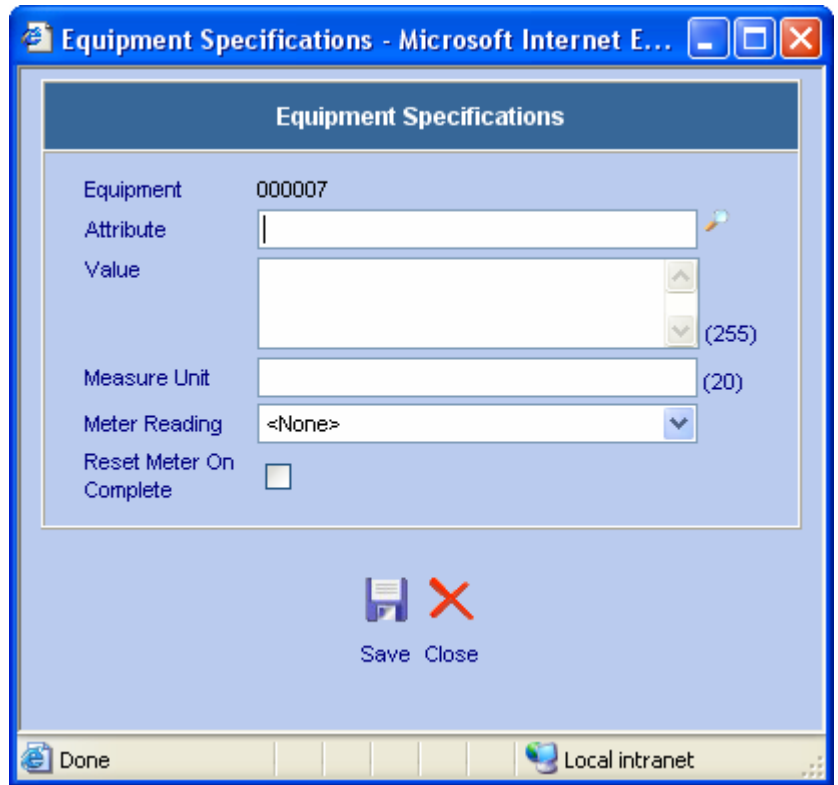
Attribute	Value	Meas Unit
ABS	Yes	Each
Door	4	Each
Engine	2000	cc
Odometer	456	KM
Oil Level	Full, Put in	Amount
Power	150	HP
Pri Meter	1	Km
Wheels	4	Each

spec (1 / 50)

Navigation icons: back, forward, search, and a 'New' icon (document with green plus) which is highlighted by a callout box.

Click on the New icon at the bottom of the screen to add a Equipment Specification.

- Click on the New icon at the bottom of the screen to open the Equipment Specification screen as shown here.
- The Equipment ID field will automatically be filled in.
- Enter the name of the Attribute. IE: color, size, speed etc.
- Enter the Value associated with the attribute. IE: number of pounds, speed, name of color etc.
- If you wish to make the a Meter, pick on of the options from the Meter Reading drop down.
- Enter the Measure unit. IE: Tons, Meters, Feet
- Pick a Meter Reading type if you wish to make this Attribute into a Meter that can accept meter readings and generate PM's. The four options are explained below:



<None>	Not used as a Meter. (Generally means that the Value does not change.) If the Value is changed the old value is NOT saved. An example would be an Attribute that denotes the color of a room or the horsepower of a motor.
Primary Meter	Makes this Attribute the main Meter used to track some kind of usage like Kilometers. The Primary Meter might be the odometer on a vehicle. You can only have one Primary Meter for a single piece of Equipment. This is the Meter that is updated on the Main screen of the Equipment record. If you only have one Meter for a piece of Equipment, it should be set as the Primary Meter. This Meter can be used to generate PM's. Meter readings must always be increasing and cannot decrease in value over time.
Secondary Meter	Makes the Attribute a Meter that tracks other usages than the Primary Meter. Secondary Meters function the same as Primary Meters with the exception of the current reading showing on the main Equipment screen. You can have as many Secondary Meters for a single piece of Equipment as you wish. Your secondary Meter might track time on a Vehicle. This Meter can also be used to generate PM's.
Measurement	The Measurement Attribute is used to take readings that fluctuate forward and backward. An example would be taking pressure readings on a boiler. Measurement Attributes cannot be used to Generate PM's.

- Reset Meter on Complete: check this box if you want Web Work to reset your Meter to zero each time a PM Work Order is completed that was created from a PM using this Meter. An example of this might be a tank that is monitored for volume by a Meter. When the meter reading reaches a certain level a PM using the Meter creates a Work Order to empty the tank. When the Work Order is completed the Meter needs to be reset to zero to start tracking the fullness of the tank again.



- Click on the **Save** button to save this Specification and return to the specifications screen for this piece of Equipment.

6.3.2 Editing Equipment Specifications

To edit equipment details:

- Click on the **RESOURCES** menu at the top of the screen and select Specifications from the drop down menu.
- The Equipment record will open in Spec mode.


Operations Resources Tools Help **Equipment Module**

Main **Specifications** Hierarchy Parts List Meter Reading History PM List Depreciation

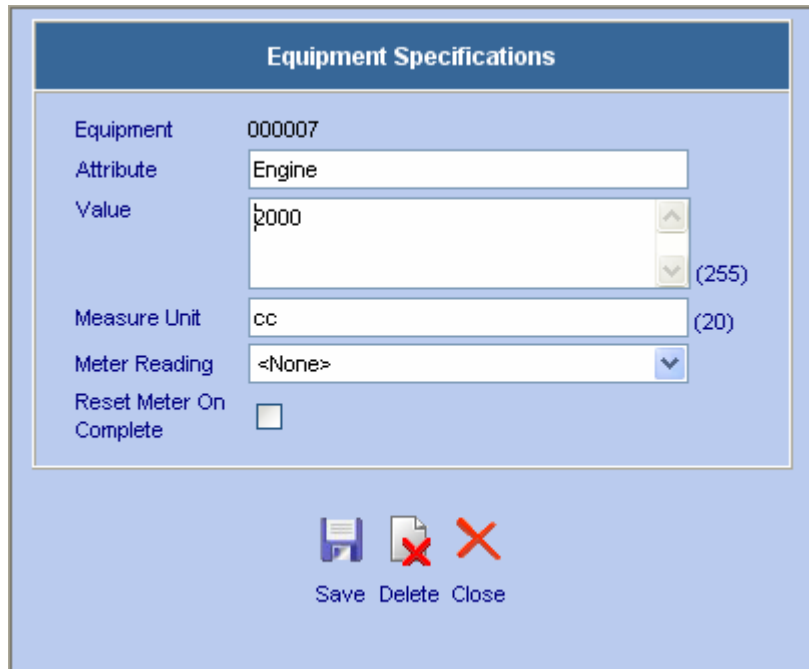
Equipment: 000007 Landcruiser
 Parent: 000008 Landcruiser FT70
 Location: SHOP garage

Attribute	Value	Meas Unit
ABS	Yes	Each
Door	4	Each
Engine	2000	cc
Odometer	456	KM
Oil Level	Full, Put in	Amount
Power	150	HP
Pri Meter	1	Km
Wheels	4	Each

Click on the record you wish to Edit.

- Make the edits you wish to make and click the  Save icon to save your record and return.

- You can Delete an Attribute by clicking the  Delete icon.



Equipment Specifications	
Equipment	000007
Attribute	Engine
Value	2000 (255)
Measure Unit	cc (20)
Meter Reading	<None>
Reset Meter On Complete	<input type="checkbox"/>

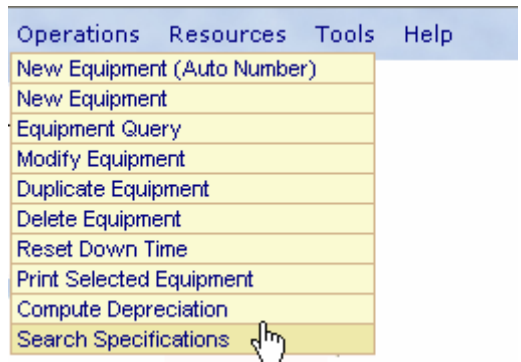
Save Delete Close


6.3.3 Searching Specifications

The search specifications feature in Web Work permits you to query the Web Work database to locate Equipment with similar Specifications. If you wanted to find all your 240 Volt motors you could search Specifications for all Equipment with an Attribute of Voltage equal to 240 Volts.

To locate Equipment containing specific Specifications:

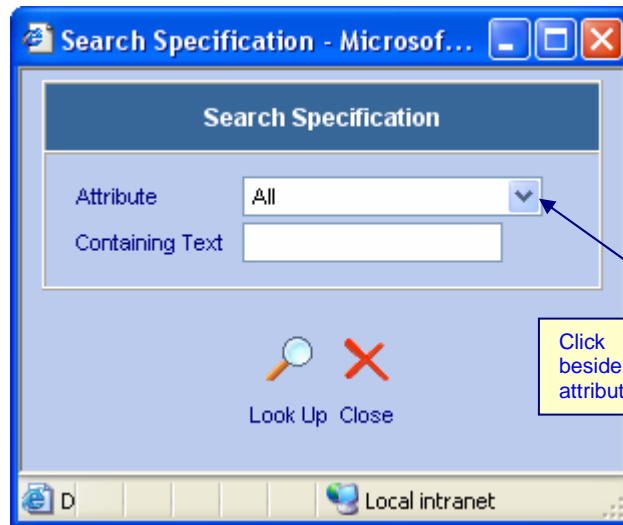
- Click on the **Operations** menu at the top of the screen and select Search Specifications from the drop down menu.



- The following screen will open.
- Click on the arrow  beside the Attribute field to select an attribute to search on.
- Enter the selection criteria into the Containing Text field.



- Click on the **Look Up** icon. A table showing all equipment records containing the selected specification will be displayed.
- Click on the check box beside the records you wish to retrieve or on **SELECT ALL** to retrieve all the records containing the specified criteria.



6.4 Equipment Hierarchies and Assemblies

6.4.1 Creating Equipment Hierarchies

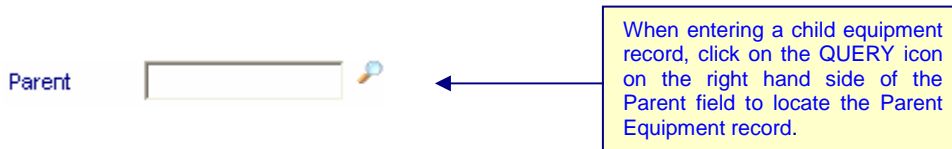
Web Work allows you to create hierarchical relationships between Equipment records by using the Parent field. You can think of them as Parent – Child relationships that make-up families of Equipment. The families are generally referred to as Assemblies.

Each Equipment record has a Parent field that can be used to establish a hierarchy between Equipment records. When you enter an Equipment number in the Parent field of an Equipment record the Equipment becomes a Child of the Parent Equipment (entered in the Parent field.)

- When entering equipment records, always enter parent equipment records first. (the main piece of equipment)
- There is no limit to the number of Children you can assign to a Parent.
- Each Child can have only one Parent.

For example:

A vehicle may be set up as the Parent Equipment record. Then the motor can be set up as the Child Equipment, linked to the Parent Equipment (the vehicle.)



- When Parent Equipment is added to an Equipment record, the Parent Description, Contact and Contact Description and Account fields will automatically be filled in with the information that was entered on the Parent Equipment record.

6.4.2 Viewing Equipment Hierarchies

When finished setting up the relationships, you will be able to view them by using the View Hierarchy feature.

To view the Equipment Hierarchy for the current Equipment Record:

- Query and retrieve the Equipment record you wish to view.
- Click the Hierarchy tab on the Equipment screen



The screenshot displays the 'Equipment Module' interface. At the top, there is a navigation bar with 'Operations', 'Resources', 'Tools', and 'Help'. Below this is a tabbed interface with tabs for 'Main', 'Specifications', 'Hierarchy', 'Parts List', 'Meter Reading', 'History', 'PM List', and 'Depreciation'. The 'Hierarchy' tab is currently selected. Below the tabs, there are two input fields: 'Equipment' with the value '000007' and 'Landcruiser'. The main content area shows a hierarchical list of parts for the selected equipment:

- 000008(Landcruiser FT70)
 - 000007(Landcruiser)
 - 000014(Handle Tool)
 - 000264(Engine)
 - 000265(Starter)
 - 000270(Carburator)
 - 000271(Butterfly Valves)
 - 000266(Chassis)
 - 000267(Transmission)
 - 000273(Torque Converter)
 - 000268(Ignition)

6.5 Using Equipment Parts Lists

The Equipment Parts List function permits you to list parts associated with a piece of equipment. This is especially useful to trades who will require this information when replacing parts on a piece of equipment. Rather than having to research the correct part, the information is readily available to them. Equipment Parts can be directly linked to Inventory Items or can be Non-Inventory Items.

6.5.1 Adding parts to an Equipment Record

To add parts to a piece of equipment:

- Click on the Parts List Tab to access the Part List screen.
- A screen similar to the one shown below will open.


Click the Parts List tab to view the Parts List for this Equipment.

Operations Resources Tools Help **Equipment Module**

Main Specifications Hierarchy **Parts List** Meter Reading History PM List Depreciation

Equipment: 000007 Landcruiser
 Parent: 000008 Landcruiser FT70
 Location: SHOP garage

Item #	Description	Quantity	Inventory
115-1179	Turbocharger GP	1	Yes
12121-11	Oil Filter	1	No
BEARING 6	6" Bearing	3	Yes
C	Valve Seals	1	No
CAPS	Oil Cap	1	Yes
IN-31	Sock Absorbers	2	Yes
SCREWS	2" screws	4	Yes

- To add a new Part, click on the  icon to open the Add Parts window as shown here.
- Enter Item #, Description and Quantity into the applicable fields. If this item is in Inventory the inventory checkbox will be ticked automatically.



- Click on the **Save** icon save the parts and return to the equipment record in Parts mode.

Add Part



Equipment: 000007

Item #:

Description: (255)

Quantity:

Inventory:

Save Close

6.5.2 Editing Parts Lists

To edit parts associated with a piece of equipment:

- Click on the Specifications Tab at the top of the screen and to access the Specifications screen
- Click on the record you wish to edit as seen here.

Operations Resources Tools Help
Equipment Module

Main Specifications Hierarchy **Parts List** Meter Reading History PM List Depreciation

Equipment	000007		Landcruiser
Parent	000008		Landcruiser FT70
Location	SHOP		garage

Item #	Description	Quantity	Inventory
115-1179	Turbocharger GP	1	Yes
12121-11	Oil Filter	1	No
BEARING 6	6" Bearing	3	Yes
C	Valve Seals	1	No
CAPS	Oil Cap	1	Yes
IN-31	Shock Absorbers	2	Yes
SCREWS	2" screws	4	Yes

- Edit the fields as required and



click the **Save** icon to save the changes and return to the equipment record.

- To delete a part from the Parts List, retrieve the record as described above and click the



Delete icon.

Edit Part

Equipment	000007
Item #	12121-11
Description	Oil Filter (255)
Quantity	1
Inventory	<input type="checkbox"/>

Save Delete Close

6.6 Meter Readings

Use the meter readings function to keep track of meter readings for a piece of equipment. Web Work has the ability to add unlimited number of meters for a single piece of Equipment. For example, you can track Mileage and Hours used for a vehicle.

Meters are created and deleted from the Specifications screen. For more details please see the Equipment Specification section found earlier in this chapter.

6.6.1 Viewing Meter Readings

To view Meter Readings:

- Access the Meter Readings screen by clicking the Meter Reading Tab as seen here.


Reading Date	Meter Reading	Meter Name
6/10/2005	1276	HRMeter
5/23/2005	750	HRMeter
5/2/2005	523	HRMeter
6/10/2005	12634	Pri Meter
6/7/2005	11875	Pri Meter
6/5/2005	10234	Pri Meter
6/2/2005	7563	Pri Meter
5/30/2005	5436	Pri Meter
5/27/2005	2304	Pri Meter
5/24/2005	200	Pri Meter
5/20/2005	1	Pri Meter

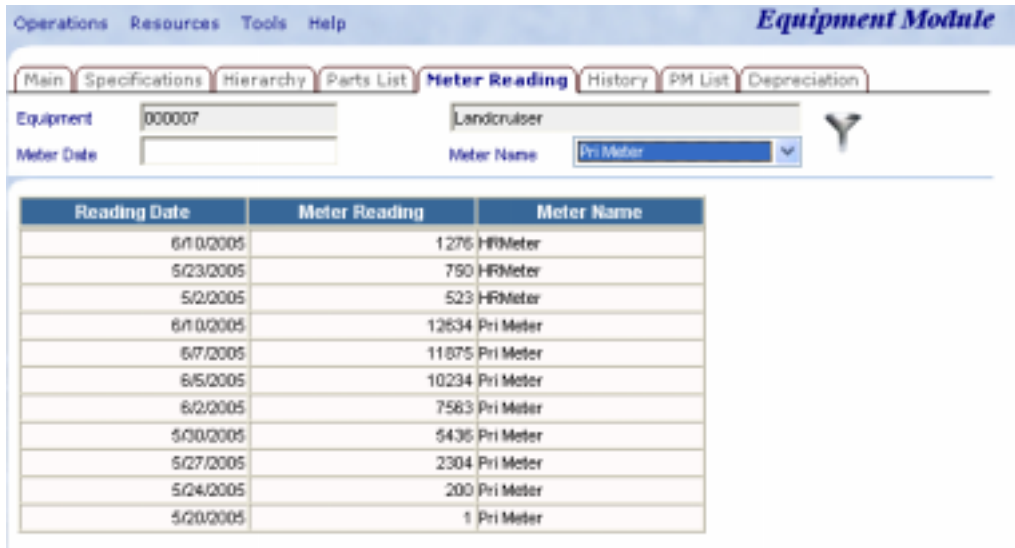
- You can filter the readings on the screen to only show a single meter.
- Click the drop down beside the Meter Name field as shown below. Choose a Meter and then click the

Filter  icon.

- To edit a Meter Reading, just click the Reading you want to edit.

6.6.2 To add a meter reading:

- Click on the  icon at the bottom of the screen to open the New Equipment Meter Reading window.



Operations Resources Tools Help **Equipment Module**

Main Specifications Hierarchy Parts List **Meter Reading** History PM List Depreciation

Equipment 000007 Landcruiser
 Meter Date Meter Name Pri Meter


Reading Date	Meter Reading	Meter Name
6/10/2005	1276	HRMeter
5/23/2005	750	HRMeter
5/2/2005	523	HRMeter
6/10/2005	12634	Pri Meter
6/7/2005	11875	Pri Meter
6/5/2005	10234	Pri Meter
6/2/2005	7563	Pri Meter
5/30/2005	5436	Pri Meter
5/27/2005	2304	Pri Meter
5/24/2005	200	Pri Meter
5/20/2005	1	Pri Meter


Click on the NEW button to add a new meter reading.

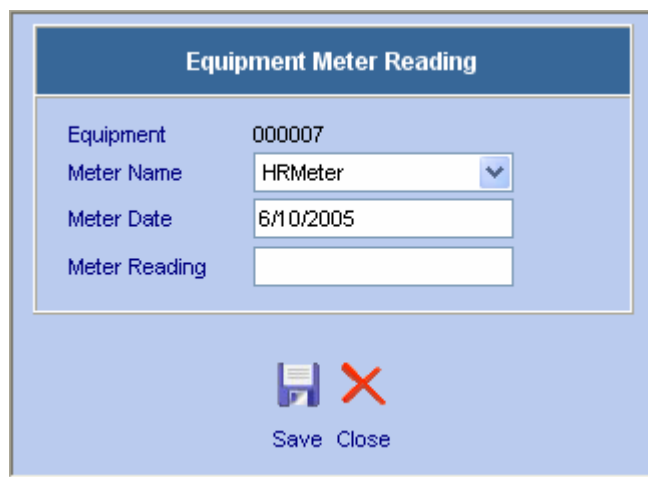
Click on the CANCEL button to cancel this operation and return to the main screen of the equipment record.



meter (1 / 50)



 

- The following screen will open.
- The Equipment ID and Meter Date will fill in automatically. To change the default Date just delete it and enter the applicable date into the Meter Date field.
- Choose the Meter Name you wish to enter reading for.
- Enter the Meter Reading and click on the  Save icon to save the meter reading and return to the Meter Reading main screen. The meter reading you just entered will appear in the table on this screen.



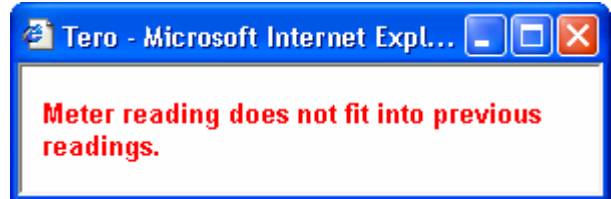
Equipment Meter Reading

Equipment 000007
 Meter Name HRMeter
 Meter Date 6/10/2005
 Meter Reading

 
 Save Close



Meter readings can be added for a date earlier than the current date, but not later than the current date. Note when entering meter readings the reading must fall into sequence or a message box such as the one shown here will open stating the reading does not fit into the previous readings.



6.7 Modifying Equipment Records and Equipment History

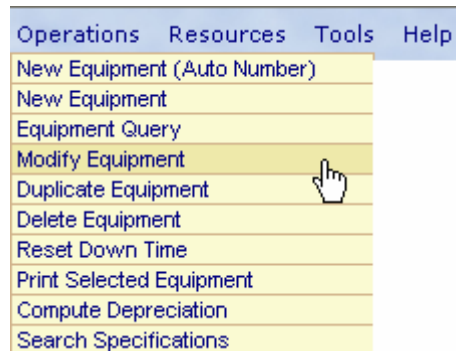
6.7.1 To Modify an Equipment Record

The modify equipment feature can be used to change the location of a piece of equipment, the operator of a piece of equipment or the status of a piece of equipment. In each case an audit trail of the change is kept and can be reported on.

To modify Equipment:

- Retrieve an Equipment record by performing an Equipment query.

- Click on the **Operations** menu and select Modify Equipment from the drop down menu as shown here.



- The following screen will open:

Equipment Modifications

Equipment: 000007 Landcruiser

Modify Date: 6/8/2005

Current Location: SHOP garage

New Location: SHOP garage

New Parent: 000008 Landcruiser FT70

Current EQ Status: OPERATING

New EQ Status: OPERATING

Current Operator: ERIC

New Operator: ERIC


Save Close

Done Local intranet


Click on the CALENDAR icon to open a calendar and select an alternative date.

Click on the LOOKUP icon to see a list of codes in the Web Work database.

- Enter a new Modification date if applicable or click on the **CALENDAR** icon and select the date from the calendar.
- You can enter the new Location into the New Location field or click on the **LOOKUP** icon to select the Location from the Web Work database. The Location Description will fill in automatically.
- You can enter a new Parent Equipment or click on the **LOOKUP** icon to select the Parent from the Web Work database. Note that if you change the Parent and the Parent has a different Location than the Equipment, the Location will change to the Parent's Location.
- You can enter a new EQ Status if applicable into the New EQ Status field or click on the **LOOKUP** icon to select one from the Web Work database.

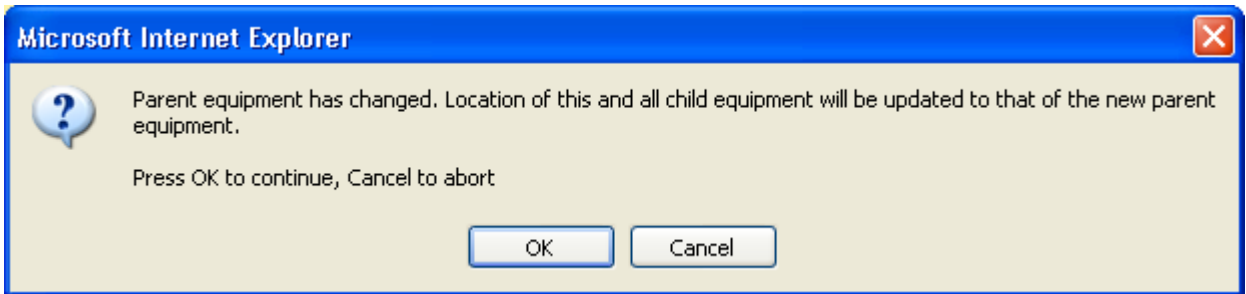
- You can enter a new Operator into the New Operator field or click on the **LOOKUP** icon  to select the Operator from the Web Work database.



- Click on the **SAVE** icon  to save your modifications. The Equipment record will be updated with the new information and an audit trail is created.



If the equipment has any child equipment associated with it a message box like the one shown below will be displayed. Click on the **OK** button to update the child equipment, click on the **CANCEL** button if only the current equipment's location is to be changed.



6.7.2 Equipment – Modification History

The Equipment Modification History feature is used to view the modification history for an equipment record.

To view Modification History:

- Click on the History Tab at the top of the screen.
- This will display Modification History as shown here.

Click the History Tab to view Modification History.

Operations Resources Tools Help **Equipment Module**


Main Specifications Hierarchy Parts List Meter Reading **History** PM List Depreciation

Equipment: 000007 Landcruiser

Modify Date:

Modify Date	Status Old/New	Operator Old/New	Location Old/New	Parent Old/New
5/16/2005	OPERATING OPERATING	LOUIS ERIC	SHOP SHOP	000008
5/4/2005	OPERATING OPERATING	LOUIS	SHOP SHOP	

- The equipment modification feature shows all modifications, which have been done, to the Status, Operator or Location and Parent of an equipment record.

- You can query this list by entering a date in the Modify Date field and clicking the  filter icon. Enter a specific date to search a single day or use the greater than ">" or less than "<" character in front of the date you enter to search a date range.

6.8 Equipment – PM List

The PM List feature is used to view the PM work orders associated with a piece of Equipment.

6.8.1 Viewing PM Work Orders Associated with an Equipment Record

- Go to the Equipment Module and use a query to retrieve the Equipment record you wish to view the PM List for.
- Click on the PM List tab at the top of the screen and the following screen should appear.

Operations Resources Tools Help
Equipment Module

Main Specifications Hierarchy Parts List Meter Reading History **PM List** Depreciation

Equipment	000007	Landcruiser
Parent	000008	Landcruiser FT70
Location	SHOP	garage

PM #	Description	Last PM	Next Due	Has Open WO	PM Type	Last PM Reading	Next PM Reading
000004	I changed this description Routine Inspection11 Procedure task no.1 Procedure task no. 2	1/20/2005	8/23/2003	Yes	Calendar		
000149	test for nested procedure		1/19/2006	Yes	Calendar		
000158	Routine Inspection	5/12/2005		No	Meter	7400	8400
000160	PM1			No	Meter		
000162	Landcruiser PM Services			No	Meter		

- The table shows the Preventive Maintenance Work Orders for this equipment record.
- If you wish to view or change a PM, click on a PM # or Description. This will open the Preventive Maintenance module of the Web Work System with the PM you choose open in edit mode.



If you want to add a PM to the list displayed you must go to the PM module to create the PM record for the applicable piece of equipment.

6.9 Depreciation

Web Work accommodates a few different methods of depreciation for Equipment so that the full life cycle costing of an Equipment record can be done. This becomes very handy when it is time to decide if you should fix or buy new.

6.9.1 Setup to Depreciate Equipment

The following fields **MUST** be entered on the Main tab of the Equipment record to begin using the depreciation tool:

Purchase Date:	The date the asset is acquired
Purchase Price:	The original cost of the asset
Salvage Value:	The value of the asset at the end of its useful life
Useful Life:	The number of periods over which the asset is being depreciated
Depreciation Method:	Way of calculating depreciation
Depreciation Factor:	The rate at which the balance declines. Only required when using Other Declining Balance Method

6.9.2 Choosing the Depreciation Method

In Web Work, depreciation is calculated on a monthly basis. You can choose four different methods of calculating depreciation for a piece of Equipment. They are as follows:

Straight Line: $(\text{Cost} - \text{Salvage}) / \text{Life} * 12$

Fixed-Declining Balance: $(\text{Cost} - \text{Total Depreciation from prior periods}) * \text{Rate}$
Where Rate = $1 - ((\text{Cost} / \text{Salvage}) ^ (1 / (\text{Life} * 12)))$ rounded to 4 decimal places.

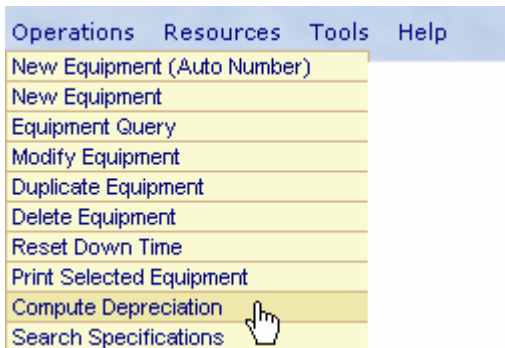
Double-Declining Balance: $(\text{Cost} - \text{Total Depreciation from prior periods}) * 2 / (\text{Life} * 12)$
The Double-Declining Balance method computes depreciation at an accelerated rate. Depreciation is highest in the first period and decreases in successive periods.

Other Declining Balance: $(\text{Cost} - \text{Total Depreciation from prior periods}) * \text{Factor} / (\text{Life} * 12)$

Where depreciation period is less than a month, depreciation will be proportional to the number of days in that month.

6.9.3 Calculate Depreciation in Web Work

To calculate Depreciation:



- In Equipment module, from the Operations menu select Compute Depreciation.

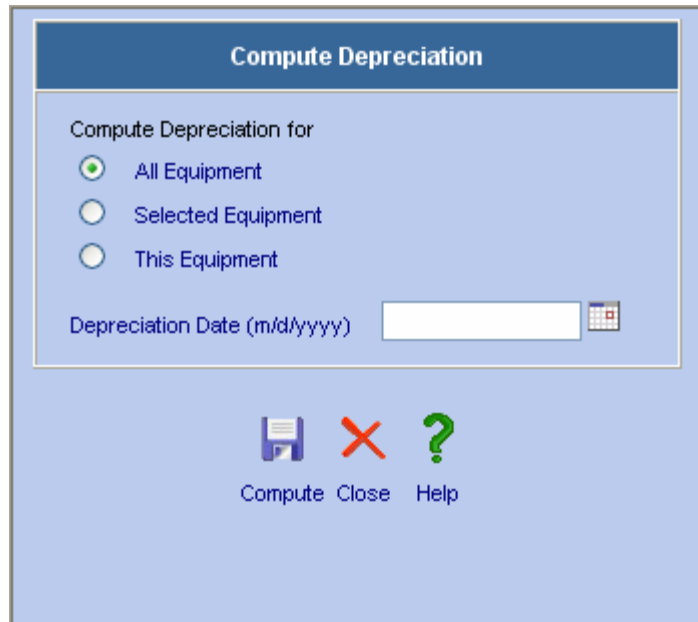
- The Compute Depreciation window will pop up as seen here.
- If you are in Edit mode, you will be presented with 3 options regarding which equipment to compute their depreciation:

All Equipment: Calculate depreciation on all equipment records that have been set up for depreciation calculation.

Selected Equipment: Calculate depreciation on records you have selected from the query.

This Equipment: Calculate depreciation on the current equipment only.

If you are in New or Query mode, only All Equipment option is available.



- Type in the depreciation date or pick a date from the calendar. Depreciation date is the last date of the period within which you want to calculate depreciation. The first date of the depreciation period will be the date following the last depreciation period or the asset purchase date if no depreciation has ever been calculated.
- Click the Generate button to perform depreciation calculation. When the process is completed, a list of equipment assets with their depreciation at each period will be displayed as seen here.

Equipment	Date	Depreciation
1150	3/31/2005	\$100.00
1150	4/30/2005	\$100.00
1150	5/1/2005	\$3.23

6.9.4 View/Edit Depreciation History

You can view and edit Depreciation records from the Depreciation tab on in the Equipment Module as seen here.

Operations Resources Tools Help **Equipment Module**

Main Specifications Hierarchy Parts List Meter Reading History PM List **Depreciation**

Equipment 1150 Chevy 1/2 Ton Pickup Truck

Depreciation History			
Date	Depreciation	Total Depreciation	Asset Value
12/31/2000	\$41.94	\$41.94	\$22,958.06
1/31/2001	\$100.00	\$141.94	\$22,858.06
2/28/2001	\$100.00	\$241.94	\$22,758.06
3/31/2001	\$100.00	\$341.94	\$22,658.06
4/30/2001	\$100.00	\$441.94	\$22,558.06
5/31/2001	\$100.00	\$541.94	\$22,458.06
6/30/2001	\$100.00	\$641.94	\$22,358.06
7/31/2001	\$100.00	\$741.94	\$22,258.06
8/31/2001	\$100.00	\$841.94	\$22,158.06
9/30/2001	\$100.00	\$941.94	\$22,058.06
10/31/2001	\$100.00	\$1,041.94	\$21,958.06
11/30/2001	\$100.00	\$1,141.94	\$21,858.06
12/31/2001	\$100.00	\$1,241.94	\$21,758.06
1/31/2002	\$100.00	\$1,341.94	\$21,658.06
2/28/2002	\$100.00	\$1,441.94	\$21,558.06
3/31/2002	\$100.00	\$1,541.94	\$21,458.06
4/30/2002	\$100.00	\$1,641.94	\$21,358.06
5/31/2002	\$100.00	\$1,741.94	\$21,258.06
6/30/2002	\$100.00	\$1,841.94	\$21,158.06

depreciation (1 / 1) X

- Click on any record to edit the depreciation amount and click Save to save the changes.
- Only the most recent (the bottom one in the list) depreciation history record can be deleted.

Edit Depreciation

Equipment	1150
Transaction Date	1/31/2001
Depreciation	<input style="width: 100%;" type="text" value="100"/>

Save
X

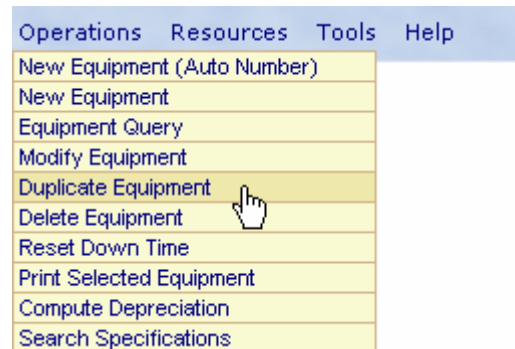
Save Close

6.10 Duplicating Equipment Records

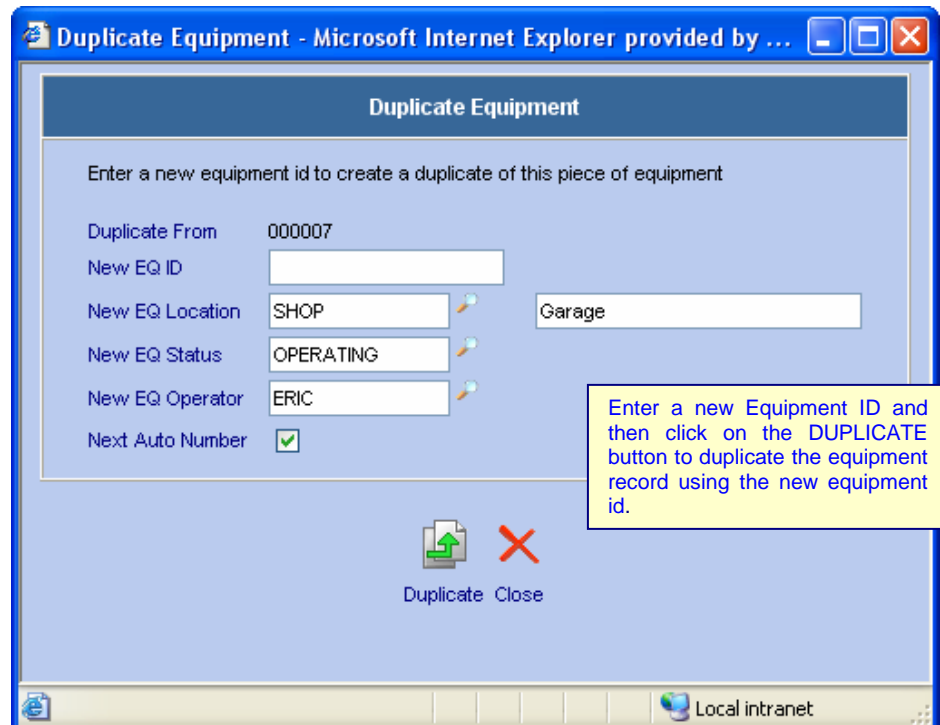
Instead of having to retype similar information for similar pieces of Equipment you can create a duplicate Equipment record and then edit the information for the new piece of Equipment.



To Duplicate an Equipment Record:

- The equipment record you wish to duplicate must be displayed on the screen. Do a query to locate and open the Equipment record you want to copy from (see Equipment Queries for more on performing Equipment Queries).
- Click on the **Operations** menu and select Duplicate Equipment from the drop down menu.



- The following screen will open.
- Enter a New Equipment ID or click on the checkbox beside Next Auto-Number to have the Web Work system assign the next available auto-number to the equipment record.



- Click on the  Duplicate icon.
- The new record will open in Edit mode.
- Edit the duplicate equipment record as required and then click on the  button to save the new equipment record.

6.10.1 Duplicating Equipment Records – Example 1

Instead of having to retype similar equipment records, you can create a duplicate equipment record and then edit the information as required for the new equipment records.

For example if you have 12 vehicles that are all similar, instead of having to create 12 equipment records, you can create one record and duplicate it 11 times.

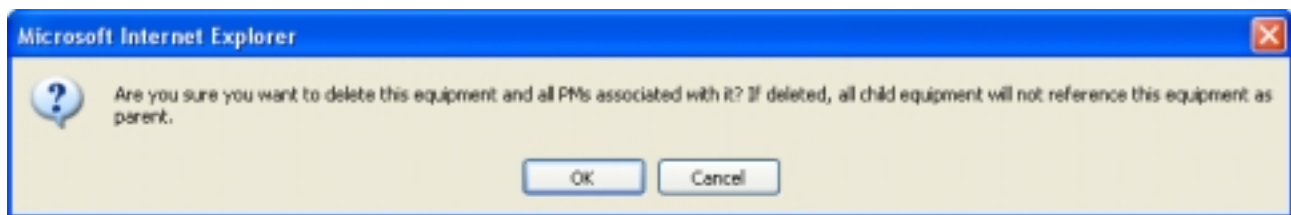
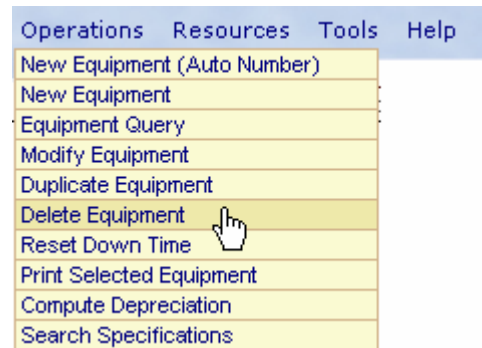
When you duplicate a record, all that you have to change is the equipment code. You can use auto-numbering to do this or select your own codes for the duplicate records. Duplicate records can be edited as required.

6.11 Deleting Equipment Records

Caution should always be used when deleting any records from the Web Work database. However, there may be times when this is necessary. An example would be when an equipment record was entered in error. Since you cannot edit an equipment code, you would have to delete the record and begin again.

6.11.1 To delete an Equipment record:

- Go to the Equipment Module and use a query to retrieve the Equipment record you wish to delete.
- Click on the **Operations** menu at the top of the Equipment Screen to display the drop down menu.
- Select Delete Equipment from the drop down menu.
- A message box such as the one shown below will open:



- Click on the **OK** button to delete the record or the **CANCEL** button to cancel the operation.



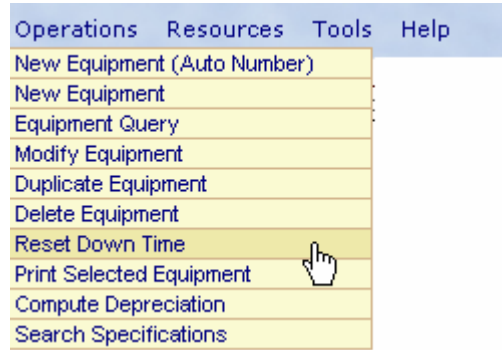
When you delete equipment records you delete all PMs associated with the Equipment record and all Child Equipment will not reference the deleted Equipment record as its Parent.

6.12 Reset Downtime

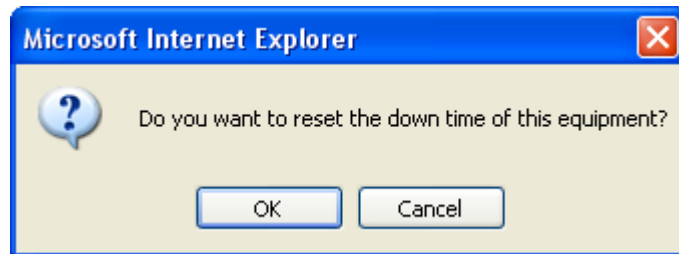
As your reporting periods change, you may want to reset the Downtime field for a piece of Equipment. As an example, you might complete year end reports and reset your downtime each year.

6.12.1 To Reset Your Downtime

- Click on the **Operations** menu and select Reset Downtime from the drop down menu.




- You will be prompted with this message.
- Click OK to reset the downtime.
- Click Cancel to quit without making any changes.



6.13 Printing Equipment Records

There are two ways to print equipment records. You can print an individual Equipment record or multiple Equipment records that you have selected and retrieved.

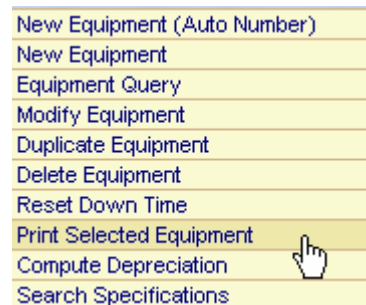
6.13.1 To print only the equipment record that is open on the screen:

- Click on the  icon at the bottom right hand side of the screen.
- The selected record will open in a new browser, print preview window.
- Click on the Browser File menu and select Print from the drop down menu to proceed with printing.

6.13.2 Printing Multiple Equipment Records

To print a batch of equipment records:

- Perform an equipment query to retrieve the desired Equipment records. See Equipment Queries for more information on performing equipment queries.
- Click on the **Operations** menu and choose Print Selected Equipment from the drop down menu as seen here.
- The selected records will open in a new browser, print preview window. Click on the Browser File menu and select Print from the drop down menu to proceed with printing.

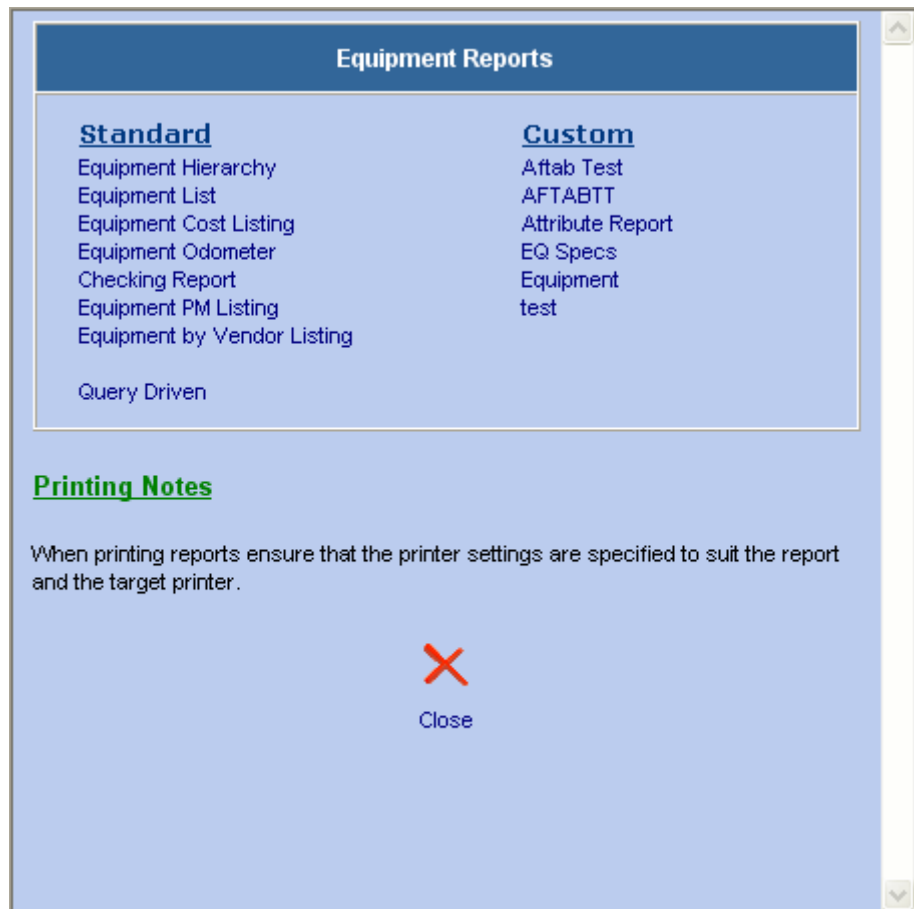


6.14 Equipment – Reports

- To access Equipment reports click on the **Tools** menu and select Reports from the drop down menu as seen here.



- A screen similar to this one shown will open.
- Click on any of the Reports listed under Standard or Custom, to open them.



Only reports applicable to the Equipment module will be displayed. To view all reports, click on the **REPORTS** module button on the left hand side of the Web Work screen. For more information about reports, see the Reports section of this manual.

6.15 Manage Routes

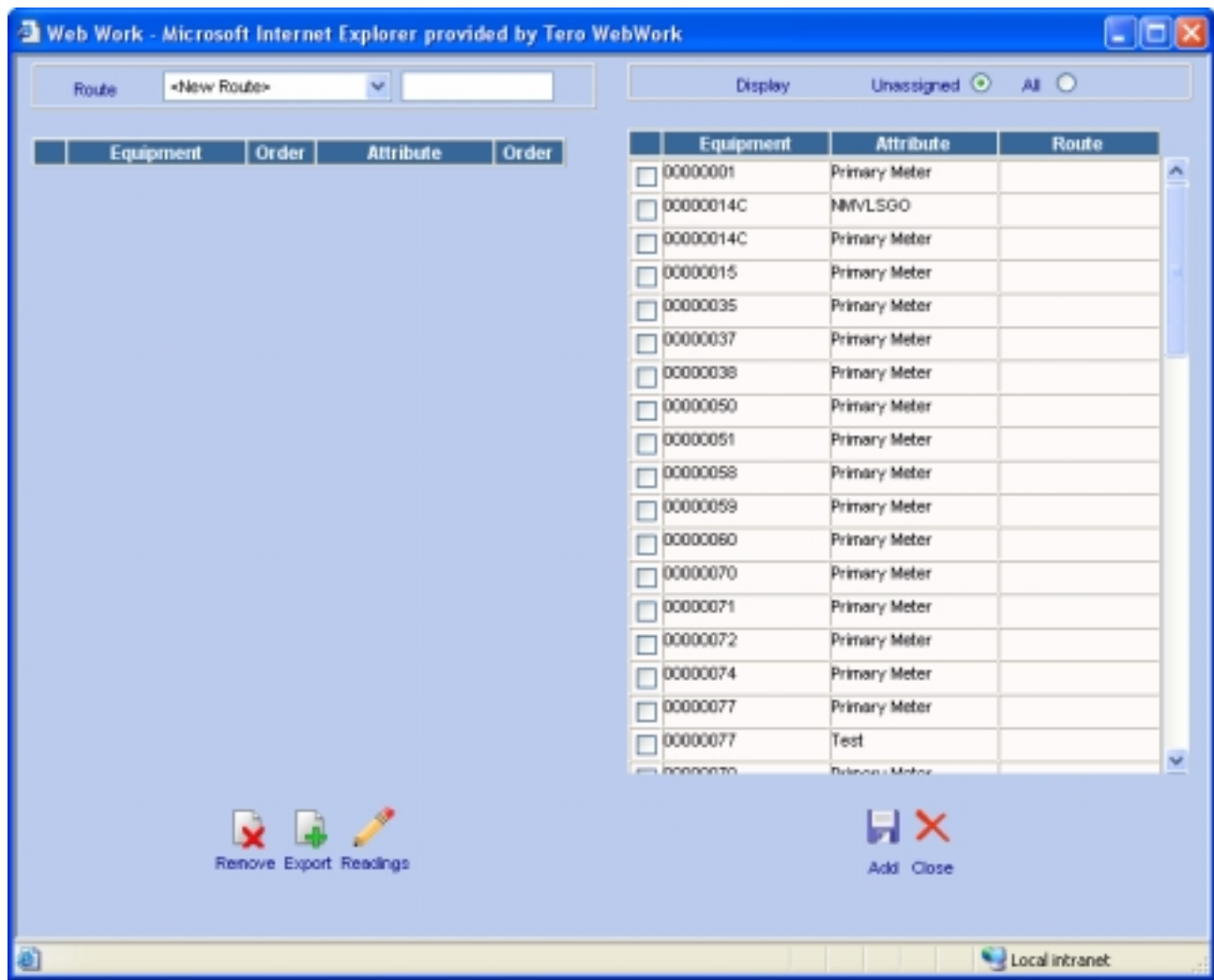
We often have the need to create a list of readings or inspection points that need to be done. Web Work allows us to create a list of Specifications that can be saved as a Route. To learn more about creating Specifications and making them into meters or measurement points, please see the Equipment Specifications section above.

Once you have created a Route it can be downloaded to a Hand Help PDA device to take readings and upload them to Web Work. Please see the Palm Module manuals for more information on this subject.

6.15.1 Create a New Route

To create a new Route or Edit an existing one:

- Go to the Tools menu in the Equipment Module and select Manage Routes.
- This will launch the Routes worksheet screen as seen here.



- Click the drop down arrow beside the Route field to start entering a new Route. Note: you must do this before you will see the screen populate as shown above.
- The right half of the screen show the Meters and Measurement points you have created from the Specifications tab of all Equipment.
- Click the Unassigned button to see only Meters and Measurement points that have not yet been assigned to a Route. Or click the All button to see them all.
- Enter a Route name in the blank field beside the Route field.
- Click and check the Meters and Measurement points on the ride side of the screen you want to add to your Route on the left side of the screen.



- When you have checked the Meters and Measurement points you want, click the **Add** icon.
- If you decide you want to add to the Route, simply repeat the last two steps.
- Your Route list should start to grow as see here, until you have all the stops you want.
- If you want to remove a Meter or Measurement point from the list, click the check box beside the record and click the



Remove icon.

Attribute	Order
Primary Meter	2
Engine light	1
brake fluid	3

Route		WestG4		
	Equipment	Order	Attribute	Order
<input type="checkbox"/>	00000035		Primary Meter	
<input type="checkbox"/>	00000037		Primary Meter	
<input type="checkbox"/>	00000107		brake fluid	
<input type="checkbox"/>	00000107		Engine light	
<input type="checkbox"/>	00000107		Primary Meter	
<input type="checkbox"/>	00000121		Amperes	
<input type="checkbox"/>	00000121		Switch	
<input type="checkbox"/>	00000122		Primary Meter	

- Click on a line to launch the Order screen and then you can set the order in which the records appear on your Route
- First enter a number to order the Equipment and then enter numbers to order the readings.



- Click the **Save** icon to save the order and repeat the previous two steps for the rest of the Equipment on your list.

- When finished your list should look like the one seen here.

Route: WestG4				
	Equipment	Order	Attribute	Order
<input type="checkbox"/>	00000107	1	Engine light	1
<input type="checkbox"/>	00000107	1	Primary Meter	2
<input type="checkbox"/>	00000107	1	brake fluid	3
<input type="checkbox"/>	00000121	2	Amperes	1
<input type="checkbox"/>	00000121	2	Switch	2
<input type="checkbox"/>	00000037	3	Primary Meter	1
<input type="checkbox"/>	00000122	4	Primary Meter	1
<input type="checkbox"/>	00000035	5	Primary Meter	1

- You are now ready to Export your Route to a Palm to take external readings. Use



the **Export** icon to begin the process and refer to the Palm Module user manual for more information.



- You can now also, use the **Readings** icon to access the Reading input screen which will be described in the next section in detail.

6.16 Route Readings

Web Work provides for three ways to take readings:

- Interfaces to third parties (See Interface Module)
- PDA devices
- Manual Entry

We will now explore the manual entry method.

6.16.1 Entering Route Readings

There are two ways to access the Route Readings screen. You can access it as described at the last step of the previous section. You can also access it from the Web Work menu bar as described below.



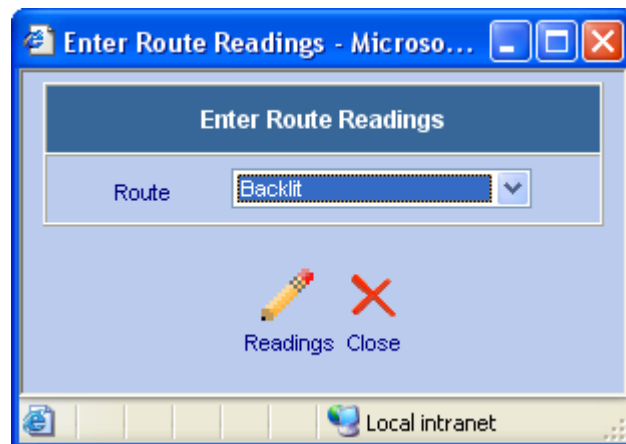
- Click Assets and then Route Readings from the Web Work Menu Bar to access the Route Reading screen as seen here.

- You can then click the arrow beside the Route field to access the Route list and choose a Route from it.

- Once you have chosen a



Route, click the **Readings** icon to access the Readings screen.




- Here we see the Route Reading screen.



- To enter a reading you can accept or edit the Date, enter your Readings and click the **Save** icon when done to save your work.

Enter Route Readings					
Equipment	Meter Name	Meter Date	Reading	Meter Date	Reading
00000107	Engine light		not sure	7/8/2005	
00000107	Primary Meter	3/22/2002	850	7/8/2005	
00000107	brake fluid		half full	7/8/2005	
00000121	Amperes		2	7/8/2005	
00000121	Switch		On	7/8/2005	
00000037	Primary Meter	3/12/2001	1	7/8/2005	
00000122	Primary Meter	1/9/2002	100	7/8/2005	
00000035	Primary Meter	3/25/2001	6002	7/8/2005	


Back Save Close