EQ2 Web Enterprise 5.x

User & Administrator Guide

Microsoft
GOLD CERTIFIED
Partner

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AUTHORED BY ANTHONY HERNANDEZ (415)786-2081 - anthony94122@outlook.com

EQ2, Inc.

Mailing address:
P.O. Box 1483
Burlington, VT 05401

Technical Support: (802)865-0920 ext. 2 *or* support@eq2.com

Sales: (888)312-HEMS *or* sales@eq2.com

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CHAPTER 1: Welcome!

About EQ2 Web Enterprise

Today's environment of care means that work requests are constantly arriving from across the hospital, physician office buildings, and cross-town surgery centers. EQ2 Web Enterprise 5.x (Web Enterprise) harnesses the power of the web to connect technicians and administrators to HEMS Enterprise from any computer within your organization. With Web Enterprise, you can:

- Review pending work orders.
- Accept unassigned work orders (technicians).
- Assign work orders to technicians (administrators).
- Update and/or close one or more work order(s) at once.
- Add equipment to the HEMS inventory.
- Locate parts.
- Run reports.

The ability to access Web Enterprise from any computer in the organization means that you spend more time maintaining and repairing your equipment and less time documenting it.

Note: For simplicity, this guide will refer to EQ2 Web Enterprise 5.x as "Web Enterprise" throughout.

About This Guide

This guide provides comprehensive information about using Web Enterprise and also uses specific formatting conventions to present special information such as lists, procedures, cautions, and tips/hints.

Organization

This guide is organized as follows:

- **Welcome:** Introduces Web Enterprise and this *User Guide*.
- **Navigating Web Enterprise:** Describes the Web Enterprise **Home** screen and how to use the Calendar and Search functions. This chapter begins on page 7.
- **Work Orders:** Creating, finding, assigning/accepting, and updating work orders. This chapter begins on page 11.
- **Equipment:** How to add equipment items. This chapter begins on page 29.
- **Parts:** How to find parts. This chapter begins on page 33.
- **Reports:** Accessing reports. This chapter begins on page 35.
- **Printing & Exporting Data:** How to print and export data from Web Enterprise. This chapter begins on page 41.

Formatting Conventions

This manual uses several formatting conventions to present information of special importance.

Text

Lists of items, points to consider, or procedures that do not need to be performed in a specific order appear in bullet format:

- Item 1.
- Item 2.

Procedures that must be followed in a specific order appear in numbered steps:

1. Perform this step first.
2. Perform this step second.

Specific keyboard keys are depicted in square brackets and are capitalized, for example: [ESC]. If more than one key should be pressed simultaneously, the notation will appear as [KEY1]+[KEY 2], for example [ALT]+[F4].

Interface elements such as document titles, fields, windows, tabs, buttons, commands, options, and icons appear in **bold** text.

Menus and submenus are indicated with the notation **Menu>Submenu**. For example, "Select **Activities>Work Order**" means that you should first select **Activities** in the menu, and then select **Work Order** in the submenu.

Special Information

The following icons and text format appear throughout this document to provide additional information that complements the main text where necessary:

CAUTION: CAUTIONS INDICATE A POSSIBILITY OF UNPREDICTABLE RESULTS AND/OR DATA LOSS IF THE SPECIFIED PROCEDURE IS NOT FOLLOWED OR IS FOLLOWED INCORRECTLY.

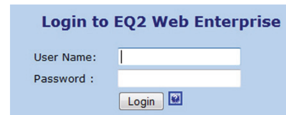
Note: Notes provide tips, hints, and other useful information to make using Web Enterprise faster and easier.

Logging into Web Enterprise

You must have a valid HEMS Enterprise account to log into Web Enterprise.

Existing User

To log into Web Enterprise with an existing user account:



1. Access the Web Enterprise **Login** page by opening your Web browser and navigating to the Web Enterprise URL for your organization.
2. Enter your Web Enterprise user name in the **User Name** field.
3. Enter your Web Enterprise password in the **Password** field.
4. Click the **Login** button.

The **EQ2 Web Enterprise Home** page appears. Please see “The Web Enterprise Home Page” on page 8 for information about the **EQ2 Web Enterprise Home** page.

Note: Contact your HEMS administrator if you need to change your password or if you forget your password.

Clicking the **?** icon next to the **Login** button opens this manual in HTML (WebHelp) format.

Logging Out of Web Enterprise

To log out of Web Enterprise, you may either:

- Click a **Logoff** link from any Web Enterprise page.
- Click the **Logoff** button below the Work Order Search Area in the Web Enterprise **Home** page.
- Close your Web browser or current browser tab.

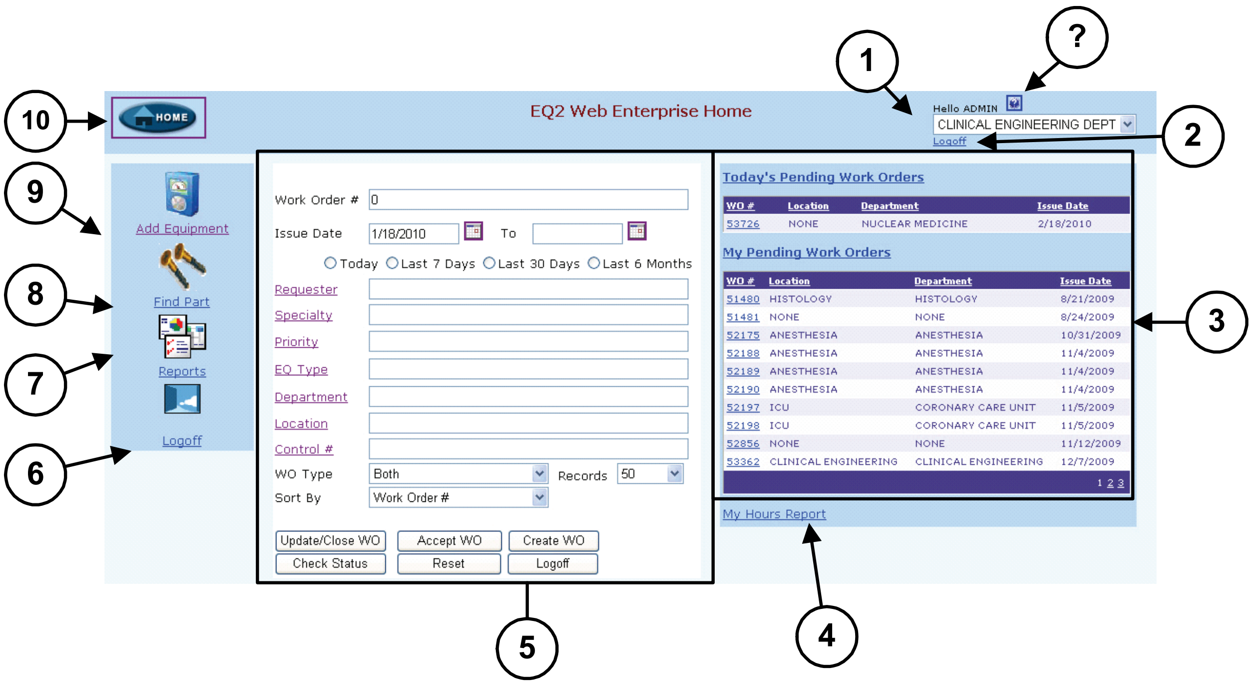
Note: Web Enterprise automatically logs you out of the system after 20 minutes of inactivity.

CAUTION: EXITING WEB ENTERPRISE WITHOUT SAVING YOUR UNSAVED CHANGES WILL CAUSE THOSE CHANGES TO BE LOST.

CHAPTER 2: Navigating Web Enterprise

The Web Enterprise Home Page

The Web Enterprise **Home** page appears when you log into Web Enterprise.



The Web Enterprise **Home** page contains the following functional elements:

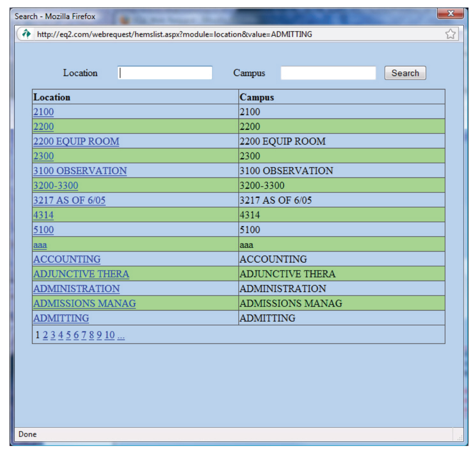
- **Help (?):** Clicking the **Help** icon opens this manual in HTML (WebHelp) format.
- **Change Service Area (1):** Selecting a Service Area using the **Change Service Area** pull-down menu refreshes the Web Enterprise **Home** page to display and work with data for that Service Area.
- **Logoff (2) and (6):** Clicking a **Logoff** link logs you out of Web Enterprise.
- **Pending Work Orders Area (3):** The Pending Work Orders Area allows you to view pending work orders, as described in "Today's Pending Work Orders" on page 12 and "My Pending Work Orders" on page 12.
- **My Hours Report (4):** Clicking the **My Hours Report** link allows you to view and compare your scheduled shift hours vs. logged work hours, as described in "My Hours Report" on page 13.
- **Work Order Search Area (5):** Entering search criteria and then clicking a button allows you to find and perform actions on work orders, as described in "CHAPTER 3: Work Orders" on page 11.
- **Reports (7):** Clicking the **Reports** link opens the **EQ2 Web Enterprise Reports** page in a separate browser window, which is described in "Accessing Reports" on page 36.

- **Find Part (8):** Clicking the **Find Part** link opens the **Find Part** page, which is described in “Finding Parts” on page 34.
- **Add Equipment(9):** Clicking the **Add Equipment** link opens the **Add Equipment** page, which is described in “Adding an Equipment Item” on page 30.
- **Home (10):** Clicking the **Home** link in any Web Enterprise page returns you to the Web Enterprise Home page.

Finding Information

Many fields within Web Enterprise contain hyperlinks. Except where noted in this guide, clicking a hyperlink opens a **Search** page that lets you search for the value to enter into that field.

Note: You should use the Search function instead of simply entering text in a field. This helps avoid entering duplicate information that can cause confusion.

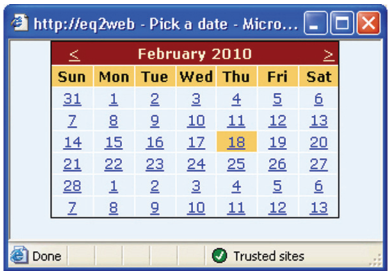


The **Search** page will have one or more search fields, as shown here. To use the **Search** page, enter your desired search criteria in the fields at the top of the page. When using the **Search** page:

- In general, most fields return matches that begin with the text entered in that field. For example, entering “def” retrieve both “defib” and “defibrillator.”
- The **EQ Type** field returns results that contain the text entered in that field. For example, entering “pump” will return “infusion pump.”
- The **ECRI** field returns results that contain the text entered in that field and also searches for matches by ECRI name and number.
- If you enter search criteria in more than one field, the **Search** page will return only those results that match all of your search criteria in all fields that contain text.
- To return all records, click the **Search** button without entering anything in the search fields.

Links that don’t open a **Search** page will open a report or the **Calendar** page. These links are described elsewhere as appropriate.

Using the Calendar



Web Enterprise generates all default dates and times based on the system date and time, and uses military (24-hour) time.

Calendars are available on many date fields within Web Enterprise. You can enter dates manually, or you can select the **Calendar** icon next to the date field to open the **Calendar** page. To use the **Calendar** page:

• Navigate months by selecting the forward or backward arrow.

• View a list of months by clicking on the month.

• Change the year by clicking the year and using the forward and backward arrows to select your desired year.

• Click a date to select it and input into the date field.

CHAPTER 3: Work Orders

Viewing Work Orders and Hours

You may view pending work orders using the Pending Work Orders Area of the Web Enterprise **Home** page. You may also view your scheduled versus actual hours worked.

- **Today's Pending Work Orders:** Displays pending work orders created during the current day.
- **My Pending Work Orders:** Displays all pending work orders assigned to you.
- **My Hours Report:** Displays your scheduled shift hours versus actual work order labor hours.

Today's Pending Work Orders

The **Today's Pending Work Orders** section of the Pending Work Orders Area displays the following information about pending work orders that have been created during the current day:

- **WO #:** Work order number. This number is unique to each work order in HEMS.
- **Location:** Location of the equipment and/or where the work needs to be performed.
- **Department:** Department making the request (typically the department that owns the equipment, if the work order is for equipment).
- **Issue Date:** Date the work order was issued (or requested using EQ2 Web Request).

Clicking the **Today's Pending Work Orders** link opens the **Work Events - Pending vs. Closed by EQ Type** report in a new browser window. This report displays the number and percentage of pending and closed work orders by equipment type for the logged-in engineer for the current day. Details include work order labor and parts costs, labor hours, and average and maximum days opened.

My Pending Work Orders

The **My Pending Work Orders** section of the Pending Work Orders Area displays the following information about pending work orders that have been assigned to you:

- **WO #:** Work order number. This number is unique to each work order in HEMS.
- **Location:** Location of the equipment and/or where the work needs to be performed.
- **Department:** Department making the request (typically the department that owns the equipment, if the work order is for equipment).
- **Issue Date:** Date the work order was issued (or requested using EQ2 Web Request).

Clicking the **My Pending Work Orders** link opens the **Work Events - Pending vs. Closed by EQ Type** report in a new browser window. This report displays the number and percentage of all pending and closed work orders by equipment type for the logged-in engineer. Details include work order labor and parts costs, labor hours and average and maximum days opened.

My Hours Report

Clicking the **My Hours Report** link below the Pending Work Orders Area opens a labor hours report in a separate browser window. This report displays the following information:

- **Date/Day:** Date and day of the week.
- **Shift hours:** Number of hours you are scheduled to work on each day.
- **Hours Worked:** Number of hours that actually worked (labor hours on work orders for that day). Clicking the link opens the **Work Orders** report, which lists all of the work orders you worked on during that day and the hours for each work order.
- **Difference:** Difference between your shift hours and the listed number of hours worked.

Searching for Work Orders

The Work Order Search Area of the Web Enterprise **Home** page allows you to search for work orders and select an action to perform on those work orders. You can enter as much or as little information as needed to find the work order(s) you are looking for in any combination of fields. Web Enterprise returns work orders that match all of your search criteria.

Clicking a link next to a field opens a search page for that field. Please see “Finding Information” on page 9 for more information about searching for data.

The available search options are:

- **Work Order #:** Work order number. This number is unique to each work order in HEMS.
- **Issue Date Range:** Enter your desired date range in the Issue Date and To fields in mm/dd/yyyy format. For convenience, you may check the **Today**, **Last 7 Days**, **Last 30 Days**, or **Last 6 months** radio buttons.
- **Requester:** Initials of the person who is requesting the work order.
- **Specialty:** Maintenance specialty or trade required to complete the work order (such as BMET, Carpentry, etc.).
- **Priority:** Work order priority.
- **EQ Type:** Type of equipment covered by the work order (for equipment work orders).
- **Department:** Department requesting the work order and/or that owns the equipment.
- **Location:** Location of the equipment and/or where the work needs to be performed.
- **Control #:** Unique number assigned to each equipment item in Web Enterprise/HEMS (for equipment work orders).
- **WO Type:** Type of work order, such as regular preventive maintenance (**Scheduled**), corrective or on demand (**Unscheduled**), or **Both**.
- **Records:** Check the appropriate radio button to select whether Web Enterprise should return the first **50**, **100**, or **500** matches.
- **Sort By:** Use the pull-down menu to select how to sort matching work orders. Available options are: **Work Order #**, **Issue Date**, **Department Name**, **Location**, **Specialty**, **Equipment Type**, **Control #**, **Requester**, and **Priority**.

The bottom of the Work Order Search Area contains the following buttons:

- **Update/Close WO:** Entering your desired search criteria and clicking the **Update/Close WO** button allows you to update and/or close one or more work order(s). Please see “Updating/Closing Work Orders” on page 16.
- **Accept WO:** If you are a technician, entering your desired search criteria and clicking the **Accept WO** button allows you to accept unassigned work orders and assign them to yourself to complete. Please see “Accepting Work Orders” on page 19.

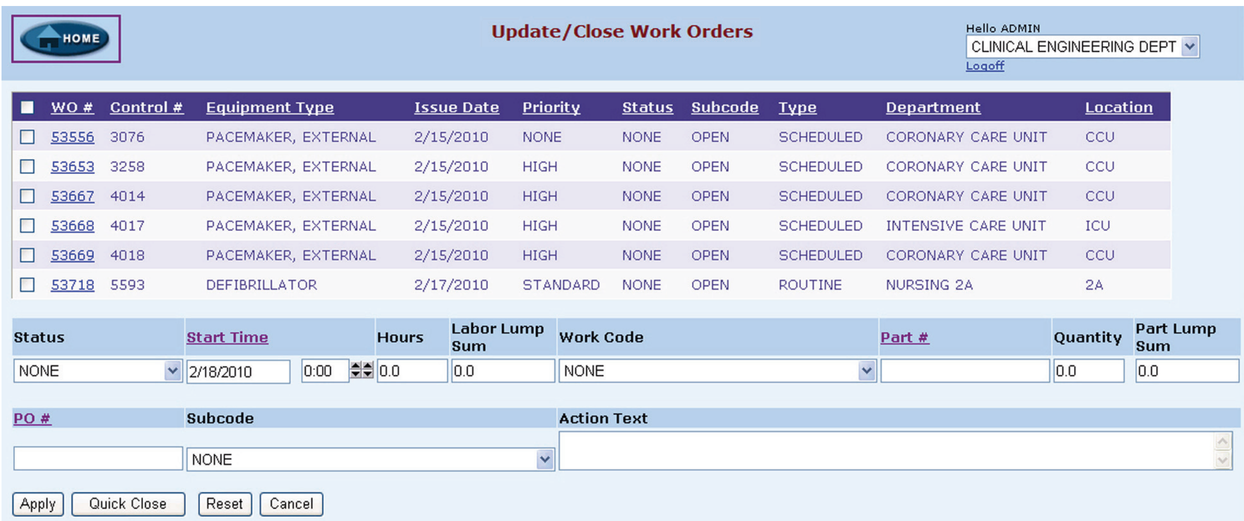
- **Assign WO:** If you are a coordinator or administrator, entering your desired search criteria and clicking the **Assign WO** button allows you to assign work orders to complete. Please see “Assigning Work Orders” on page 21.
- **Create WO:** Clicking the **Create WO** button allows you to create a new work order. Please see “Creating Work Orders” on page 23.
- **Check Status:** Entering your desired search criteria and clicking the **Check Status** button allows you to check the status of the selected work order(s). Please see “Checking Work Order Status” on page 27.
- **Reset:** Clicking the **Reset** button clears your search criteria so you can begin a new search.
- **Logoff:** Clicking the **Logoff** button logs you out of Web Enterprise.

Updating/Closing Work Orders

Clicking the **Update/Close WO** button in the Web Enterprise **Home** page opens the **Update/ Close Work Orders** page, which allows you to quickly update multiple work orders at once.

The Update/Close Work Orders Page

The **Update/Close Work Orders** page appears as follows:



	WO #	Control #	Equipment Type	Issue Date	Priority	Status	Subcode	Type	Department	Location
☐	53556	3076	PACEMAKER, EXTERNAL	2/15/2010	NONE	NONE	OPEN	SCHEDULED	CORONARY CARE UNIT	CCU
☐	53653	3258	PACEMAKER, EXTERNAL	2/15/2010	HIGH	NONE	OPEN	SCHEDULED	CORONARY CARE UNIT	CCU
☐	53667	4014	PACEMAKER, EXTERNAL	2/15/2010	HIGH	NONE	OPEN	SCHEDULED	CORONARY CARE UNIT	CCU
☐	53668	4017	PACEMAKER, EXTERNAL	2/15/2010	HIGH	NONE	OPEN	SCHEDULED	INTENSIVE CARE UNIT	ICU
☐	53669	4018	PACEMAKER, EXTERNAL	2/15/2010	HIGH	NONE	OPEN	SCHEDULED	CORONARY CARE UNIT	CCU
☐	53718	5593	DEFIBRILLATOR	2/17/2010	STANDARD	NONE	OPEN	ROUTINE	NURSING 2A	2A

The **Update/Close Work Orders** page displays the following information for work orders that match your search criteria:

- **WO #:** Unique number assigned to each work order. Clicking the link opens a separate browser window with detailed information about the selected work order.
- **Control #:** Unique number assigned to each equipment item in Web Enterprise/HEMS, if applicable.
- **Equipment Type:** Type of equipment covered by the work order (for equipment work orders).
- **Issue Date:** Date the work order was issued (or requested using EQ2 Web Request).
- **Priority:** Work order priority.
- **Status:** Most recent status of the work order (such as “Awaiting Parts,” etc.).
- **Subcode:** Additional tracking information for the work order. For preventive maintenance work orders, this documents the outcome (such as “PM Successful”). For corrective work orders, this field documents the cause (such as “Failure”).
- **Type:** Type of work order, such as regular preventive maintenance (**Scheduled**), corrective or on demand (**Unscheduled**), or **Both**.

- **Department:** Department requesting the work order and/or that owns the equipment.
- **Location:** Location of the equipment and/or where the work needs to be performed.

Clicking a column header sorts the work orders by the clicked column.

Updating/Closing Work Orders

To update work order(s):

1. Select the work order(s) to update by checking the appropriate checkbox(es) in the list of work orders. To select all, click the checkbox at the top of the listing.
2. Enter some or all of the following information, as appropriate:
   - **Status:** Update the work order status using the **Status** pull-down menu. To close the selected work order(s), select **CLOSED** (or click the **Quick Close** button as described below).
   - **Start Date:** Enter the date you started work in the **Start Date** fields. For the date, use the format mm/dd/yyyy. Clicking the **Start Date** field opens a calendar, which allows you to select the date. Please see "Using the Calendar" on page 10 for more information about using the **Calendar**. You may either enter the time manually in the time field, or use the up and down arrows to update the hour and minutes as needed.
   - **Hours:** Enter the number of hours you spent performing work on the selected work order(s). Use decimals to record your time. For example, if you worked 4 hours and 45 minutes, enter 4.75 in the **Hours** field.
   - **Labor Lump Sum:** Enter any lump-sum labor charges in dollars and cents in the **Labor Lump Sum** field.
   - **Work Code:** Enter the appropriate code to describe the labor performed using the **Work Code** pull-down menu.
   - **Part #:** Enter the part number in the **Part #** field. Clicking the **Part #** link opens a **Search** page that allows you to search for the part. You may also add a part that is not in the list to reflect using a non-inventory part.
   - **Quantity:** Enter the number of parts you used in the **Quantity** field.
   - **Part Lump Sum:** Enter any lump-sum parts charges in dollars and cents in the **Part Lump Sum** field.
   - **Purchase Order:** Enter the purchase order number in the **PO#** field. Clicking the **PO#** link opens a **Search** page that allows you to locate the appropriate purchase order.
   - **Subcode:** Additional tracking information for the work order. For preventive maintenance work orders, this documents the outcome (such as "PM Successful"). For corrective work orders, this field documents the cause (such as "Failure").
   - **Action Text:** Describe this update in the **Action Text** field, being sure to include adequate detail.
3. Finish the update as appropriate:

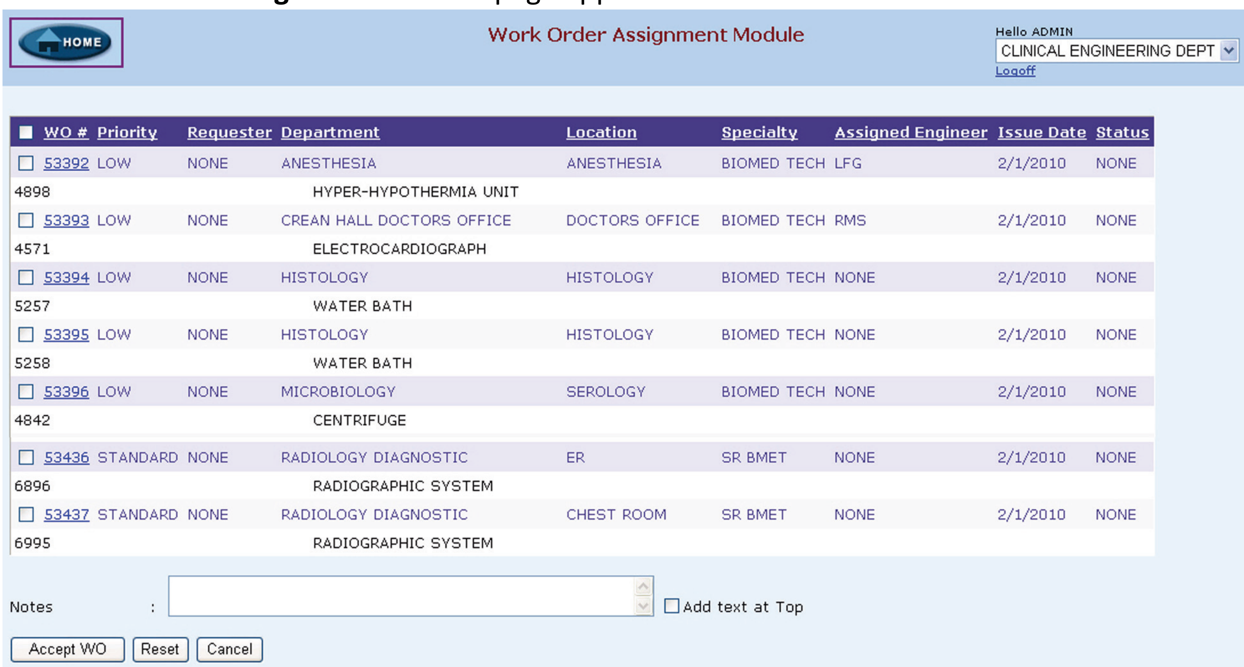
- Clicking the **Apply** button applies your update to the selected work order(s).
- Clicking the **Quick Close** button changes the status of the selected work order(s) to **CLOSED**.
- Clicking the **Reset** button clears your entries and allows you to re-enter information from scratch.
- Clicking the **Cancel** button returns you to the Web Enterprise **Home** page without making any changes.

Accepting Work Orders

If you are a technician, clicking the **Accept WO** button in the Web Enterprise **Home** page opens the **Work Order Assignment Module** page, which allows you to accept (assign to yourself) multiple work orders at once for you to work on.

The Accept Work Orders Page

The **Work Order Assignment Module** page appears as follows:



The **Work Order Assignment Module** page displays the following information for work orders that match your search criteria:

- **WO #:** Unique number assigned to each work order. Clicking the link opens a separate browser window with detailed information about the selected work order.
- **Priority:** Work order priority.
- **Requester:** Initials of the person who is requesting the work order.
- **Department:** Department requesting the work order and/or that owns the equipment.
- **Location:** Location of the equipment and/or where the work needs to be performed.
- **Specialty:** Maintenance specialty or trade required to complete the work order (such as BMET, Carpentry, etc.).
- **Assigned Engineer:** Engineer assigned to work on the work order and/or equipment item(s).
- **Status:** Most recent status of the work order (such as "Awaiting Parts," etc.).

Clicking a column header sorts the work orders by the clicked column.

Accepting Work Orders

To accept work order(s):

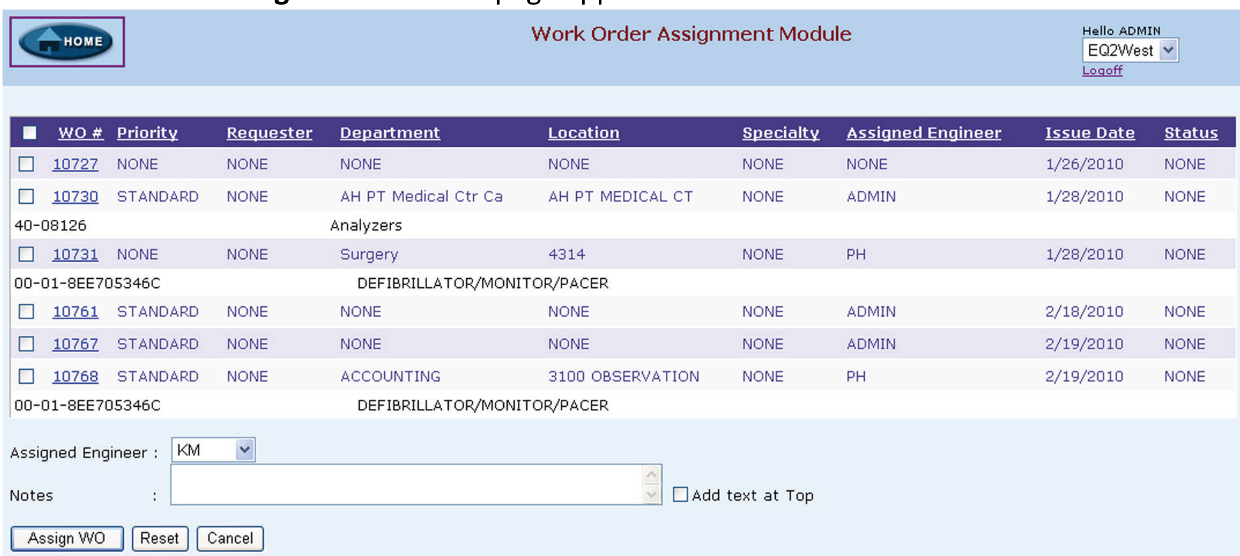
1. Select the work order(s) to accept by checking the appropriate checkbox(es) in the list of work orders. To select all, click the checkbox at the top of the listing.
2. Enter any necessary information in the **Notes** field. Checking the **Add text at Top** checkbox adds your text to the top of the selected work order(s) Action Text field:
3. Finish accepting the work order(s) as appropriate:
    - Clicking the **Accept WO** button indicates your acceptance of the assigned work order(s) and updates the work order(s) to reflect this change.
    - Clicking the **Reset** button clears your entries and allows you to re-enter information from scratch.
    - Clicking the **Cancel** button returns you to the Web Enterprise **Home** page without accepting any work orders.

Assigning Work Orders

If you are a work coordinator or administrator, clicking the **Assign WO** button in the Web Enterprise **Home** page opens the **Work Order Assignment Module** page, which allows you to assign or reassign multiple work orders at once to a maintenance technician.

The Assign Work Orders Page

The **Work Order Assignment Module** page appears as follows:



The **Work Order Assignment Module** page displays the following information for work orders that match your search criteria:

- **WO #:** Unique number assigned to each work order. Clicking the link opens a separate browser window with detailed information about the selected work order.
- **Priority:** Work order priority.
- **Requester:** Initials of the person who is requesting the work order.
- **Department:** Department requesting the work order and/or that owns the equipment.
- **Location:** Location of the equipment and/or where the work needs to be performed.
- **Specialty:** Maintenance specialty or trade required to complete the work order (such as BMET, Carpentry, etc.).
- **Assigned Engineer:** Engineer assigned to work on the work order and/or equipment item(s).
- **Status:** Most recent status of the work order (such as “Awaiting Parts,” etc.).

Clicking a column header sorts the work orders by the clicked column.

Assigning Work Orders

To assign work order(s):

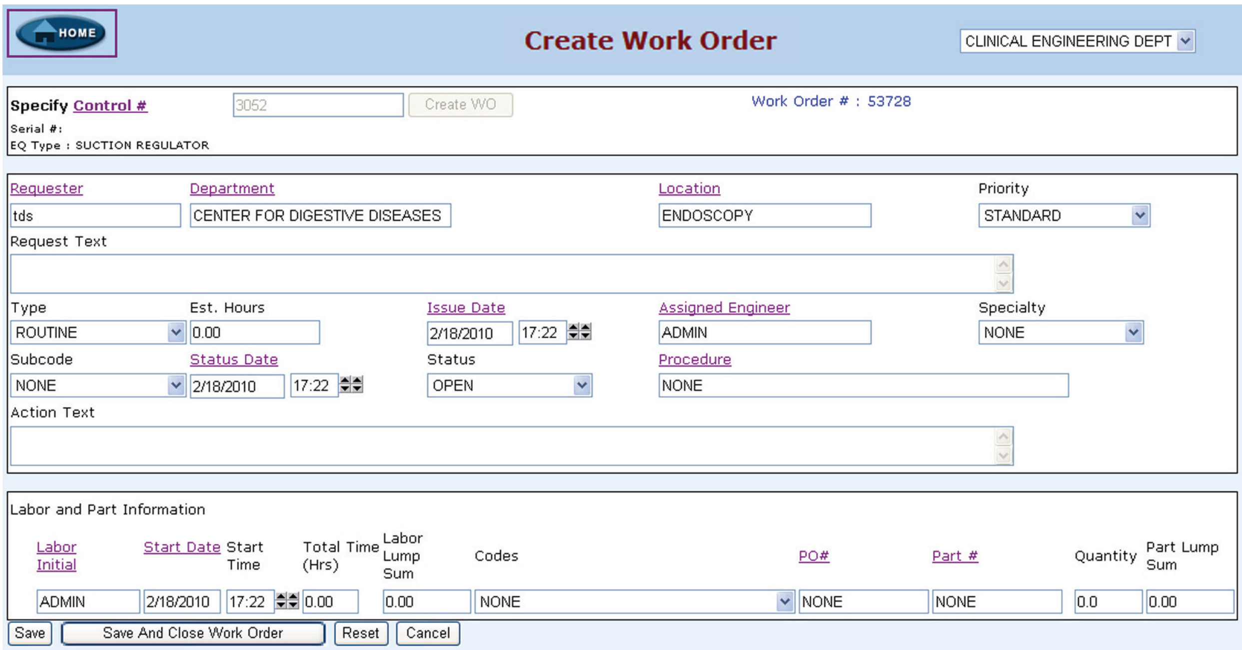
1. Select the work order(s) to assign or reassign by checking the appropriate checkbox(es) in the list of work orders. To select all, click the checkbox at the top of the listing.
2. Select the engineer to assign the work order(s) to using the **Assigned Engineer** pull-down menu.
3. Enter any necessary information in the **Notes** field. Checking the **Add text at Top** checkbox adds your text to the top of the selected work order(s) Action Text field:
4. Finish assigning the work order(s) as appropriate:
   - Clicking the **Assign WO** button assigns the selected work order(s) to the selected engineer.
   - Clicking the **Reset** button clears your entries and allows you to re-enter information from scratch.
   - Clicking the **Cancel** button returns you to the Web Enterprise **Home** page without assigning any work orders.

Creating Work Orders

Clicking the **Create WO** button in the Web Enterprise **Home** page opens the **Create Work Order** page, which allows you to create a new work order.

The Create Work Order Page

The **Create Work Order** page appears as follows.



The **Create Work Order** page contains the following information:

Note: Non-equipment work orders will automatically fill with your HEMS Enterprise defaults, if configured.

- **Control #:** Unique number assigned to each equipment item in Web Enterprise/HEMS. Clicking the **Control #** link opens a **Search** window that allows you to locate the correct equipment item. The work order will automatically fill with the selected equipment item's information (such as **Department** and **Location**). If you are creating a work order that does not involve equipment, leave this field set to **None**.
- **Requester:** Initials of the person who is requesting the work.
- **Department:** Department requesting the work order and/or that owns the equipment.
- **Location:** Location of the equipment and/or where the work needs to be performed.
- **Priority:** Work order priority.
- **Request Text:** The **Request Text** field is where the work request is documented.

- **Type:** Type of work order, such as regular preventive maintenance (**Scheduled**), corrective or on demand (**Unscheduled**), or **Both**.
- **Est Hours:** Estimated number of hours required to complete the work order.
- **Issue Date:** Date the work order was issued (or requested, if the work order was entered using EQ2 Web Request).
- **Assigned Engineer:** Engineer assigned to work on the work order and/or equipment item(s).
- **Specialty:** Maintenance specialty or trade required to complete the work order (such as BMET, Carpentry, etc.).
- **Subcode:** Additional tracking information for the work order. For preventive maintenance work orders, this documents the outcome (such as “PM Successful”). For corrective work orders, this field documents the cause (such as “Failure”).
- **Status Date:** Date and time of the last action taken on the work order.
- **Status:** Most recent status of the work order (such as “Awaiting Parts,” etc.).
- **Procedure:** The preventive maintenance procedure.

Creating a Work Order

To open a work order using the **Create Work Order** page:

1. Select the following:
   - If this work order is for an equipment item, enter the item’s control number in the **Control #** field, which will automatically include the appropriate equipment information in the work order.
   - Leave the **Control #** field set to **None** (the default value) if this work order is not for any equipment.

Note: Non-equipment work orders will automatically fill with your defaults, if configured.

2. Click the **Create WO** button to create a new work order.
3. Select the initials of the person requesting the work order using the **Requester** field.
4. Enter the department making the request in the **Department** field.

Note: You may either click a field or press [TAB] to move from field to field.

5. Select the location using the **Location** field (if this work order is for equipment).
6. Define the work order priority (urgency) using the **Priority** field.
7. Enter your request in the **Request Text** field, making sure to be as detailed as possible.

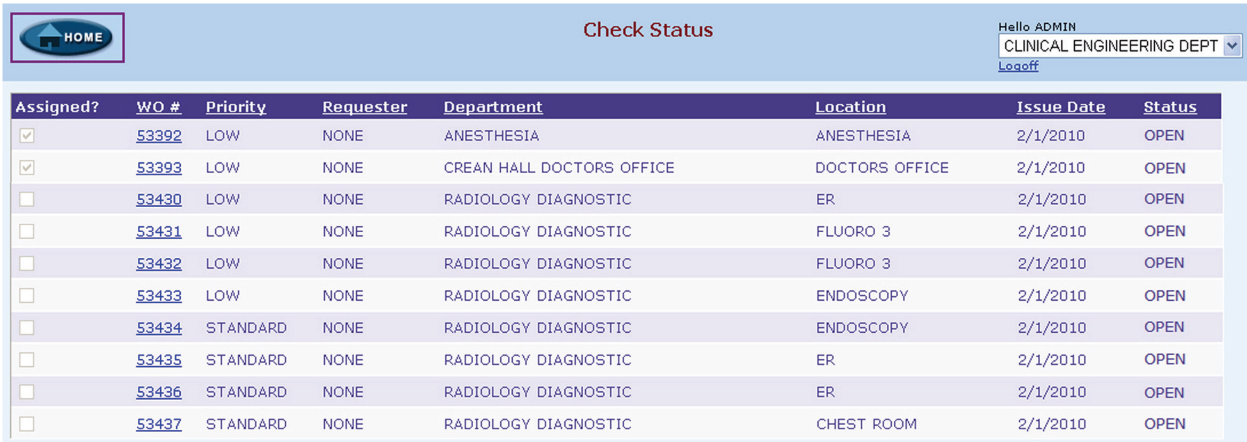
8. Select the work order type using the **Work Order Type** field.
9. Estimate the hours to complete the work using the **Est Hours** field.
10. The **Issue Date** field defaults to the current date/time. If you need to change the date, use the format mm/dd/yyyy. Clicking the **Issue Date** link opens a calendar, which allows you to select the date. Please see "Using the Calendar" on page 10 for more information about using the **Calendar**. You may either enter the time manually in the time field, or use the up and down arrows to update the hour and minutes as needed.
11. By default, the **Assigned Engineer** field displays your information. If needed, you may change the assigned engineer. The **Speciality** field will automatically fill depending on the assigned engineer. You can also manually select the specialty, if needed.
12. Select the appropriate subcode using the **Subcode** field. For preventive maintenance work orders, this field documents the outcome, such as "PM Successful." For corrective work orders, this field documents the cause, such as "Battery Failure."
13. The **Status Date** field defaults to the current date and time. To enter a different date, use the format mm/dd/yyyy. Clicking the **Status Date** link opens a calendar, which allows you to select the date. Please see "Using the Calendar" on page 10 for more information about using the **Calendar**. You may either enter the time manually in the time field, or use the up and down arrows to update the hour and minutes as needed.
14. Enter the most recent work order status in the **Status** field, such as "Awaiting Parts," "Device in Use," etc. until work is completed.
15. Select the procedure to use to complete the work order using the **Procedure** field, if necessary.
16. You can add labor information to the work order (such as if you have already performed work before creating the work order). To add labor information:
    - **Labor Initial:** Initials for the technician who performed the work. This field defaults to your initials.
    - **Start Date:** The **Start Date** field defaults to the current date and time. To enter a different date, enter the time you started work in the **Start Date** fields. For the date, use the format mm/dd/yyyy. Clicking the **Start Date** field opens a calendar, which allows you to select the date. Please see "Using the Calendar" on page 10 for more information about using the **Calendar**. You may either enter the time manually in the time field, or use the up and down arrows to update the hour and minutes as needed.
    - **Hours:** Enter the number of hours you spent performing work on the selected work order(s). Use decimals to record your time. For example, if you worked 4 hours and 45 minutes, enter 4.75 in the **Hours** field.
    - **Labor Lump Sum:** Enter any lump-sum labor charges in dollars and cents in the **Labor Lump Sum** field.
    - **Codes:** Enter the appropriate code to describe the labor performed using the **Work Code** pull-down menu.
    - **PO#:** Enter the purchase order number in the **PO#** field.

- **Part #:** Enter the part number in the **Part #** field. Entering a part number that is not in inventory will populate the HEMS Enterprise work order **Part # (Non Inventory)** field.
- **Quantity:** Enter the number of parts you used in the **Quantity** field.
- **Part Lump Sum:** Enter any lump-sum parts charges in dollars and cents in the **Part Lump Sum** field.

17. Finish creating the work order as appropriate:
    - Clicking the **Save** button saves the work order.
    - Clicking the **Save and Close Work Order** button saves the work order and immediately changes the status to **Closed**.
    - Clicking the **Reset** button clears your entries and allows you to re-enter information from scratch.
    - Clicking the **Cancel** button returns you to the Web Enterprise **Home** page without making any changes.

Checking Work Order Status

Clicking the **Check Status** button in the Web Enterprise **Home** page opens the **Check Status** page, which displays the status of the work orders matching your search.



Assigned?	WO #	Priority	Requester	Department	Location	Issue Date	Status
☑	53392	LOW	NONE	ANESTHESIA	ANESTHESIA	2/1/2010	OPEN
☑	53393	LOW	NONE	CREAN HALL DOCTORS OFFICE	DOCTORS OFFICE	2/1/2010	OPEN
☐	53430	LOW	NONE	RADIOLOGY DIAGNOSTIC	ER	2/1/2010	OPEN
☐	53431	LOW	NONE	RADIOLOGY DIAGNOSTIC	FLUORO 3	2/1/2010	OPEN
☐	53432	LOW	NONE	RADIOLOGY DIAGNOSTIC	FLUORO 3	2/1/2010	OPEN
☐	53433	LOW	NONE	RADIOLOGY DIAGNOSTIC	ENDOSCOPY	2/1/2010	OPEN
☐	53434	STANDARD	NONE	RADIOLOGY DIAGNOSTIC	ENDOSCOPY	2/1/2010	OPEN
☐	53435	STANDARD	NONE	RADIOLOGY DIAGNOSTIC	ER	2/1/2010	OPEN
☐	53436	STANDARD	NONE	RADIOLOGY DIAGNOSTIC	ER	2/1/2010	OPEN
☐	53437	STANDARD	NONE	RADIOLOGY DIAGNOSTIC	CHEST ROOM	2/1/2010	OPEN

The **Check Status** page displays the following information:

- **Assigned?:** Whether (checked) or not (cleared) a work order has been assigned to a technician.
- **WO #:** Work order number. This number is unique to each work order in HEMS. Clicking the link opens a separate browser window with detailed information about the selected work order.
- **Priority:** Work order priority.
- **Requester:** Initials of the person who is requesting the work order.
- **Department:** Department requesting the work order and/or that owns the equipment.
- **Location:** Location of the equipment and/or where the work needs to be performed.
- **Issue Date:** Date the work order was issued (or requested using EQ2 Web Request).
- **Status:** Most recent status of the work order (such as "Awaiting Parts," etc.).

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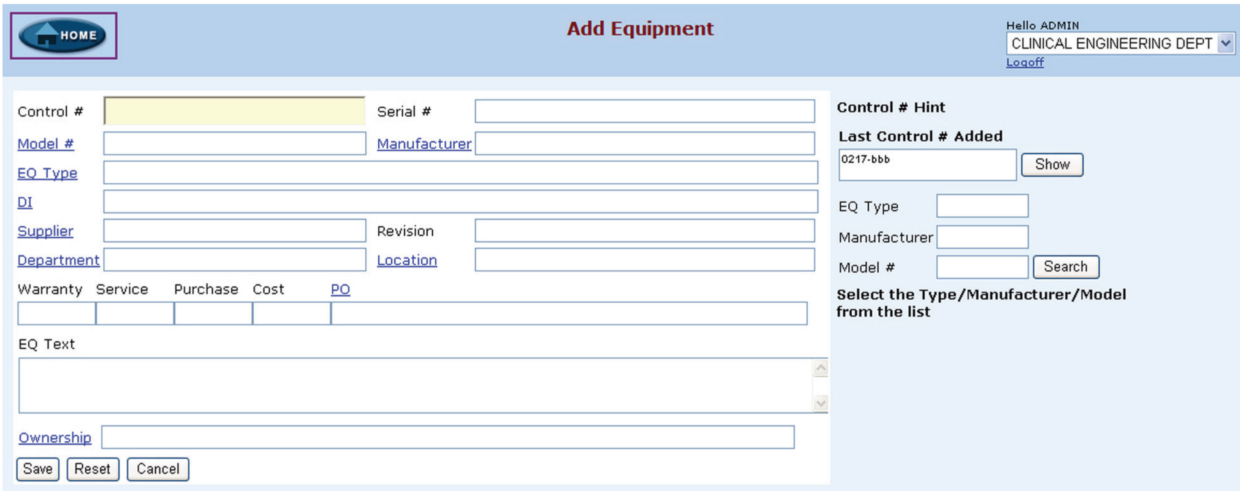
CHAPTER 4: Equipment

Adding an Equipment Item

Clicking the **Add Equipment** link in the Web Enterprise **Home** page opens the **Add Equipment** page.



To add an equipment item:

1. Enter the following information for the equipment item you are adding:
   - **Control #:** Unique control number for the equipment item you are adding. If you need help selecting a new control #, click the **Show** button next to the **Last Control # Added** field to see the most recently created control number.

Note: You may either click a field or press [TAB] to move from field to field.

   - **Serial #:** Unique number assigned by the manufacturer to the equipment item you are adding.
   - **Model #:** Equipment item model number.
   - **Manufacturer:** Manufacturer that makes the equipment item.
   - **EQ Type:** Type of equipment item being added.

*Note: The Search Area on right side of the page can help you auto-fill equipment information. Entering search criteria and then clicking the **Search** button creates an expandable list of matching equipment types and models. Find the appropriate type/model in the list and click it to auto-fill this information for the equipment item you are adding.*

- **DI:** Device inclusion category for the equipment item. Device inclusions allow you to classify equipment for identification purposes such as, “Utility Management,” “Fire Safety,” etc.
- **Supplier:** Vendor who supplies the equipment item.
- **Revision:** The software/firmware revision that is running on the equipment. You may use this as a custom field if revision is not applicable.
- **Department:** Department that owns the equipment.
- **Location:** Where the equipment item is located.
- **Warranty**: Warranty expiration date, in mm/dd/yyyy format.
- **Service:** Service contract expiration date, in mm/dd/yyyy format.
- **Purchase:** Purchase date, in mm/dd/yyyy format.
- **Cost:** Purchase price, in dollars and cents.
- **PO:** Purchase order that covered the purchase of the equipment item.
- **EQ Text:** Additional information about the equipment item.
- **Ownership:** Entity that owns the equipment item.

2. Finish adding the equipment item as appropriate:
   - Clicking the **Save** button adds the new equipment item to HEMS.
   - Clicking the **Reset** button clears your entries.
   - Clicking the **Cancel** button returns you to the Web Enterprise **Home** page without making any changes.

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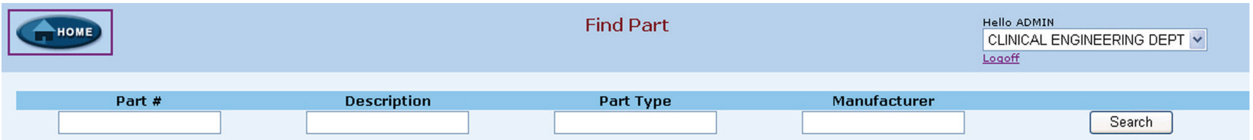
CHAPTER 5: Parts

Finding Parts

Clicking the **Find Part** link in the Web Enterprise **Home** screen opens the **Find Part** page.



Search for parts by entering info in one or more of the following fields:

- **Part #:** Part number. This number is unique for each part entered in HEMS.
- **Description:** Description of the part.
- **Part Type:** Type of part.
- **Manufacturer:** Manufacturer that makes the part.

Note: You may either click a field or press [TAB] to move from field to field.

To find a part, enter your desired search criteria, and then click the **Search** button. Web Enterprise returns the following information for matching part(s)

- **Service Area:** Service Area where the parts store is located.
- **Part #:** Part number. This number is unique for each part entered in HEMS.
- **Description:** Description of the part.
- **Part Type:** Type of part.
- **Manufacturer:** Manufacturer that makes the part.
- **Stock On Hand:** How many of that part you have in inventory.

Please see “Finding Information” on page 9 for more information about searching within Web Enterprise.

Note: Part searches only return parts with stock on hand.

CHAPTER 6: Reports

Accessing Reports

Clicking the **Reports** link in the Web Enterprise **Home** page opens the **EQ2 Web Enterprise Reports** page in a separate browser window.

Web Enterprise includes the following reports:

- **Equipment Listing:** This report shows the equipment inventory in list format. Technicians can run this report for a quick glance at equipment with next due date for preventive maintenance.
- **Equipment History:** Lists equipment items and the maintenance history for each item.
- **Work Order Review:** Review pending versus closed work orders including percentages, costs, and hours.
- **Work Order Summation by Department:** Summarizes total work orders count, percentage, hours, and costs by department.
- **Work Order Summation by Priority:** Summarizes total work orders count, percentage, hours, and costs by priority
- **Procedure Review:** Displays a procedure and its associated tasks in sequence. This report also shows all of the equipment associated with the procedure, if selected.

Clicking a report link opens the selected report in a separate browser window.

Web Enterprise Reports

This section provides additional information about the reports included with Web Enterprise.

Equipment Listing

The **Equipment Listing** report shows the equipment inventory in list format. Technicians can run this report for a quick glance at equipment with next due date for preventive maintenance. You can sort this report by **Equipment Type**, **Model # + Manufacturer**, **Manufacturer + Model #**, **Manufacturer**, **Department**, **Cost Center #**, **Location**, **Device Inclusion**, **Control #**, **Serial #**, **ECRI #**, and **ECRI Name**.

This report presents the following information:

- **Control #:** Unique number assigned to each equipment item in HEMS.
- **Serial #:** Unique number assigned to the equipment item by the manufacturer.
- **EQ Type:** Type of equipment.
- **Model #:** Equipment model number.
- **Manufacturer:** Equipment manufacturer name.
- **Department:** Department that owns the equipment.
- **Location:** Location of the equipment.
- **DI:** Device inclusion for the selected equipment.
- **Next Date (PM):** Date the equipment item is next due for preventive maintenance.
- **Interval:** Preventive maintenance interval.
- **Risk Factor:** Level of risk assigned to the equipment item.

Equipment History

The **Equipment History** report displays the maintenance history for the specified equipment item control number. You can specify whether or not to include work order details in this report. This report includes equipment details, schedule information, contract information (if defined), work history grouped by scheduled and unscheduled. It also includes graphs for replacement matrix and cost of ownership.

Work Order Review

The **Work Order Review** report allows you to review pending versus closed work orders including percentages, costs, and hours. You can display this summary by **Work Order Type**, **Work Order Priority**, **Assigned Engineer**, **Location**, **Department**, **Specialty**, **Subcode**, and **Requester**. You must specify either an **Issue Date** (when the work order was issued) or **Status Date** (either the close date or the most recent work order status date if still pending) for this report.

This report presents both a bar graph that displays pending and closed work orders and a pie chart that shows the relative number of work orders by summary type for the "top 10" types on the first page. The second page presents the following information:

- Total number and percent of work orders that are opened, closed or pending.
- Cost of labor and parts.
- Hours spent.
- Maximum and average days work orders remain open.

Work Order Summation by Department

The **Work Order Summation by Department** report summarizes the total work order count, percentage, hours, and costs by department. To report on preventive maintenance work orders only, filter the report by setting the **WO Type** to **Scheduled**.

This report presents a pie chart showing a graphical overview of work order statuses and then presents a breakdown of work orders by hours, percentages, and costs.

You must specify a date range for this report.

Work Order Summation by Priority

The **Work Order Summation by Priority** report summarizes the total work order count, percentage, hours, and costs by priority. To report on preventive maintenance work orders only, filter the report by setting the **WO Type** to **Scheduled**.

This report presents a pie chart showing a graphical overview of work order statuses and then presents a breakdown of work orders by hours, percentages, and costs.

You must specify a date range for this report.

Procedure Review

The **Procedure Review** report displays a procedure and its associated tasks in sequence. This report also shows all of the equipment associated with the procedure, if selected. You can sort this report by **Procedure Name**, **Procedure #**, **Specialty + Procedure Name**, **Specialty + Procedure Number**, **Procedure Type + Procedure Name**, and **Procedure Type + Procedure #**.

This report presents the following information for each procedure:

- **Procedure Name:** Name of the maintenance/repair/etc. procedure.
- **Proc #:** Number assigned to the procedure.
- **Procedure Type:** Type of procedure.
- **Specialty:** Maintenance specialty.
- **Source:** Where the procedure originated (such a ASHE).
- **Task Sequence:** Order in which the tasks are performed.

Then, for each task in the procedure, the report displays:

- **Task name:** Name of the task.
- **Task #:** Unique number associated with each task.
- **Interval:** The interval of the task.
- **Est Hrs:** Estimated hours.

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CHAPTER 7: Printing & Exporting Reports

Printing

Web Enterprise allows you to print report data from reports generated by clicking the **Reports** link in the Web Enterprise **Home** page.

To print Web Enterprise data:

1. Launch the report you want to run. See “CHAPTER 6: Reports” on page 35 for more information about Web Enterprise reports.
2. In the browser window, select your desired filter criteria and then click the **View Report** button.
3. When your report appears, click the **Print** icon next to the **Export** link (not in your browser toolbar).

4. The Windows **Print** window appears, allowing you to specify such options as:
    - Which printer to print to.
    - Which page(s) to print.
    - How many copies of the report to print.
    - Other advanced options (by clicking the **Properties** button).
5. Select your desired print options and then click the **Print** button.

Exporting

Web Enterprise allows you to export report data from reports generated by clicking the **Reports** link in the Web Enterprise **Home** page.

To export Web Enterprise data:

1. Launch the report you want to run. See “CHAPTER 6: Reports” on page 35 for more information about Web Enterprise reports.
2. In the browser window, select your desired filter criteria and then click the **View Report** button.
3. When your report appears, select your desired export format using the **Export** pull-down menu. The available options are:

   - XML with report data
   - CSV (comma delimited)
   - TIFF
   - Adobe Acrobat (PDF)
   - Web archive
   - Microsoft Excel (1997-2003 format)
4. Click the **Export** link, which highlights once you select your desired export format.

5. The Windows **File Download** window appears, allowing you to specify the drive/folder in which to save or open the exported data.

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EQ2, Inc.

Mailing address:
P.O. Box 1483
Burlington, VT 05401

Technical Support: (802)865-0920 ext. 2 *or* support@eq2.com

Sales: (888)312-HEMS *or* sales@eq2.com