Equipment Tracking System

User Guide
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Overview

The Equipment Tracking System (ETS) enables campus users to:

- View details about equipment held in the Oracle Fixed Assets module; and
- Request that Property Services record a disposition of equipment in Oracle.

ETS enforces rules so that users will only have access to equipment they are authorized to see. For more information, go to the section *Who Gets to See What?*

The User Guide is organized into four major sections:

- ETS User Roles
- What all users can do in ETS
- What ETS Administrators can do
- Who gets to see what in ETS

Questions relating to equipment data (e.g., why am I the assignee, equipment in the wrong room, etc.) or requests for additional help may be directed to PropertyServices@caltech.edu.
ETS User Roles

Assignees and Delegates

- **Assignee**: The primary owner of equipment, typically a Principal Investigator of a grant funded Research project or a Manager of a general budget funded project through which equipment was purchased.

- **Delegate**: An individual who has been delegated with responsibility for an item of equipment.

- **Equipment Level Access**: Both Assignees and Delegates are roles associated with specific items of equipment.

Administrators

- **Organization Administrators (Org Admins)**: Individuals that are delegated with responsibility for all equipment for their Organization.

- **Property Services Administrators (PS Admins)**: Individuals that are delegated with responsibility for all equipment for the Institute.

- **View Only Users**: Administrators who have view only access to all equipment for the Institute.

- **Organization Level Access**: Org Admin, PS Admin and View Only User roles are associated with organizations responsible for items of equipment.
What All Users Can Do in ETS

1. View and Export a list of equipment to which they have access;
2. Request disposition of equipment;
3. Add a comment about a piece of equipment; and/or
4. Assign a delegate to the equipment.

Search for Equipment

The Equipment Search is the ETS Home.

1. Enter your search criteria into the search field(s); and
2. Click the Next button.

Please Note: The Search icon is extremely useful for assuring that the criteria that you have entered is in the proper format. Clicking on the icon will open the Search Dialog window. Try clicking on the Search button BEFORE entering any search criteria to see the format of the data.
View and Export Equipment Report

The results for the Equipment Search appear on the Equipment Report.

Buttons

**Refine Search:** Takes you back to the Equipment Search page, keeping your search criteria.

**New Search:** Takes you back to the Equipment Search page with all search criteria removed.

**Equipment Request:** Takes you to the Request List from which you can generate a request for equipment disposition. This functionality will be covered in the next section.

**Action:** Presents a list of different options for modifying the Equipment Report including:

- Downloading/Exporting to Excel (photos will NOT export);
- Modifying the report format including removing or reordering columns, additional filtering, determining number of rows showing, etc.; and
- Saving the modified report.

**TIP:** To get a printable report that includes photos, create a custom report. Please see Modifying Equipment Reports for more details.
Request Disposition of Equipment and Other Requests

1. Choose the Request Type Retired, Donated, Sold, Traded-in, Internally Transferred, or Externally Transferred

2. Select the check box(es) for the Equipment for your request

3. Click the Take Action button

4. Enter the information into the fields
   a. Fields with an asterisk (*) preceding are required fields for data entry

5. Click the Submit button
E-mail Notifications for Requests

Equipment Disposition Request: When an equipment disposition request is submitted, ALL parties authorized access to the equipment will receive an e-mail notification similar to the one below. Any recipient of the e-mail may question the request by contacting Property Services at PropertyServices@caltech.edu.

![Example E-mail Notification]

Approval of Disposition Request and Confirmation of Recording in Oracle: When an equipment disposition request is approved and the disposition has been recorded in the Oracle Fixed Asset and Financial modules, ALL parties authorized access to the equipment will receive another e-mail notification.

![Example E-mail Notification]
Add a Note to an Equipment Record

1. Choose Request Type Add Note
2. Select the check box(es) for the Equipment
3. Click Take Action button
4. Add your note
5. Click Submit/Resubmit

Notes added will appear on the Equipment Record in the last column to the right.
Add Delegate(s) to Equipment

1. Choose Request Type Assign Delegate
2. Select the check box(es) for the Equipment
3. Click Take Action button

4. Choose the preferred option from For All Assets Listed Below
5. Search for the delegate you want to assign
6. Click Apply button

**PLEASE NOTE:** If the delegate is already a user of ETS, access to the item of equipment will be immediate. Otherwise, the delegate must wait overnight for the ETS link to appear in access.caltech.
Modify Equipment Reports

The search results in the Equipment Report may be modified in many different ways by utilizing the options available with the Actions button.

Select Columns: Removing and Reordering Columns

The Select Columns option enables you to choose and reorder the columns that you want to display in your report. Select Columns opens a window in which you can:

1. Select the column(s) you would like to display or not display
   a. Use the Ctrl key to select more than one column at a time
2. Use the side arrows to move the columns from Display to Do Not Display and back
3. Use the up and down arrows to change the order of the columns
Filter on Columns

The Filter option enables you to further fine-tune your search on the specific found set. Filter opens a window that enables you to select the column on which you want to filter, the Operator for that search, and enter or select the details for which you want to search.

You can also filter on a specific column by simply clicking on the column, which will open up a drop-down that allows you to:

1. Sort on the column
2. Delete the column
3. Enter a search phrase
4. Select the filter item from a list of values
**Rows Per Page**

The *Rows Per Page* option enables you to determine how many rows are displayed on a page. This is a great option for creating a report that will be printed out.

![Equipment Report](image)

**Format**

The *Format* option enables you to format the report in a variety of ways.

**Sort**

*Sort* opens a window that enables you to select the columns on which you want to sort, and the order in which the sorts occur.

![Sort](image)
Highlight

Highlight opens a window that enables you to highlight both by row or column and for specific data, as dictated by you.

Save Report

Save Report opens a window that enables you to save all of the formatting that you have just completed for reuse in the future.

Upon saving a list of reports will now be available each time you run an equipment search.
**Reset**

Reset opens a window to validate that you would like to restore the report to the default settings.

![Reset Window]

**Help**

Help opens a new window with very detailed help on the available actions.

**Download**

Download opens a window that prompts you to choose the report download format.

![Download Window]

**PLEASE NOTE:** Downloads, regardless of the format, DO NOT include the images that are in the Equipment Report.

**TIP:** To get a printable report that includes photos, create a custom report. Set Rows Per Page to All, and limit the number of columns to 7 (including the photo column) for portrait or 9 columns in landscape.

If you absolutely need more columns, then use the Shrink to Fit option in the Print Preview.

Don’t forget to save your custom report so you can reuse it in the future!
What Administrators Can Do in ETS

Organization Administrators (Org Admins)

Org Admins are able to maintain their organization’s Org Admin roster by:

- Adding a new Org Admin;
- Removing an Org Admin; and
- Replacing an existing Org Admin with a new Org Admin.

**PLEASE NOTE:** If the person added as Org Admin is already a user of ETS, access to the organization’s equipment will be immediate. Otherwise, the Org Admin must wait overnight for the ETS link to appear in access.caltech.
Property Services Administrators (PS Admins)

PS Administrators are able to:

- Approve disposition requests
- Maintain equipment and tag images
- Maintain the roster of Org Administrators
- Maintain the roster of PS Administrators
- Maintain the roster of View Only Users

Approve Disposition Requests

Use the *PS Admin Actions* tab to Approve/Reject disposition requests.
Maintain Equipment and Tag images

1. Search for the equipment

2. Click on the page view icon on the far left:

3. Click on Upload Image button to add a new image or replace the existing image

4. Click on Remove Image button to remove the existing image
Use the PS Admins tab to maintain the roster of PS Administrators; Use the View Only Users tab to maintain the roster of View Only Users.
Who Gets to See What?

Access to equipment data is determined at one of two levels: Equipment and Organization.

Equipment-Level Access

Equipment-level data access is provided to Assignees and Delegates.

- **Assignee**: The primary owner of the equipment. For equipment purchased under research grants, the Assignee is typically the Principal Investigator of the project.
  - Assignees are able to view and make requests for any equipment for which they are the Assignee.
  - Assignees are able to name delegates for equipment on which they are the Assignee.
- **Delegate**: An individual who has been delegated with responsibility for an item of equipment.
  - Delegates are able to view and make requests for any equipment for which they are a Delegate.
  - Anyone with an access.caltech account may be named as a delegate for an asset.
  - Each item of equipment may be assigned to one or more delegates.
  - While each item of equipment must have an Assignee, delegates are not required.

Organization-Level Access

Organization-level equipment data access is provided to those individuals identified as ETS Org Admins, PS Admins or View Only Users

- **Organization**: Each item of equipment is associated with the Assignee’s primary HR assignment organization.
  - Organization-level access is given at the Division level, thus Org Admins have access to the equipment assigned to people whose primary HR assignment is for an organization within the division.
- **Org Admins** are able to view and make requests for all equipment assigned to their Division.
- **PS Admins and View Only Users** are able to view all of Caltech’s equipment.