

# Caltech

Office of Property Services

# Equipment Tracking System

February-March 2019

# Overview

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

- View details about equipment held in the Oracle Fixed Assets module.
- Generate and print equipment reports
- Add notes about equipment (helps during inventory)
- Add pictures of equipment
- Request that Property Services update an equipment's record when the equipment is
  - Moved from one PI's lab space to a different PI's lab space, or moved from one building or site to another (Internal Transfer),
  - Retired or disposed
  - Loaned

# Overview

ETS enforces rules so that users will only have access to equipment they are authorized to see, take action, or notified when an asset's information is changed, etc.

- **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.
- **Organization Administrator:** An individual that is delegated with responsibility for all equipment for their organization.

# Overview

## Using ETS

- At this time, Campus is not required to use ETS; however, some users find this tool beneficial to help them track the movement of their equipment for inventory purposes
- Although ETS has other features, Campus is not required to use those features at this time.

# Objective

Provide Campus Users a hands-on tutorial on how to use the ETS to:

- I. Access the application
- II. View and Export a list of equipment to which they have access
- III. Add equipment pictures
- IV. Add notes or a comment about a piece of equipment
- V. Provide Notification (not certification or processing) of intent to Retire, Dispose, Transfer, or change information related to Equipment

# Comments about Dispositions, Retirements, and Internal Transfers

- Retirements & Dispositions
  - ETS is only a reporting tool.
  - Submitting a request via the tool does not automatically retire the asset in the system but it starts the disposition process by notifying PS of intent to change equipment status
  - The Equipment Disposal Certification (EDC) process must be used to retire or dispose of all equipment.

# Comments about Dispositions, Retirements, and Internal Transfers

- Internal Transfers
  - Types
    - From one PI to another (Intra or Inter Division)
    - Change from one PTA to another (Cost Transfers)
    - Change in equipment ownership
    - Change in Caltech location
  - Other than cost transfers, all other transfers can be reported using ETS even when the transfers do not involve changes in location (Movements)
  - All equipment internal transfers must flow through the Equipment Internal Transfer process by completing the new Equipment Internal Transfer Form

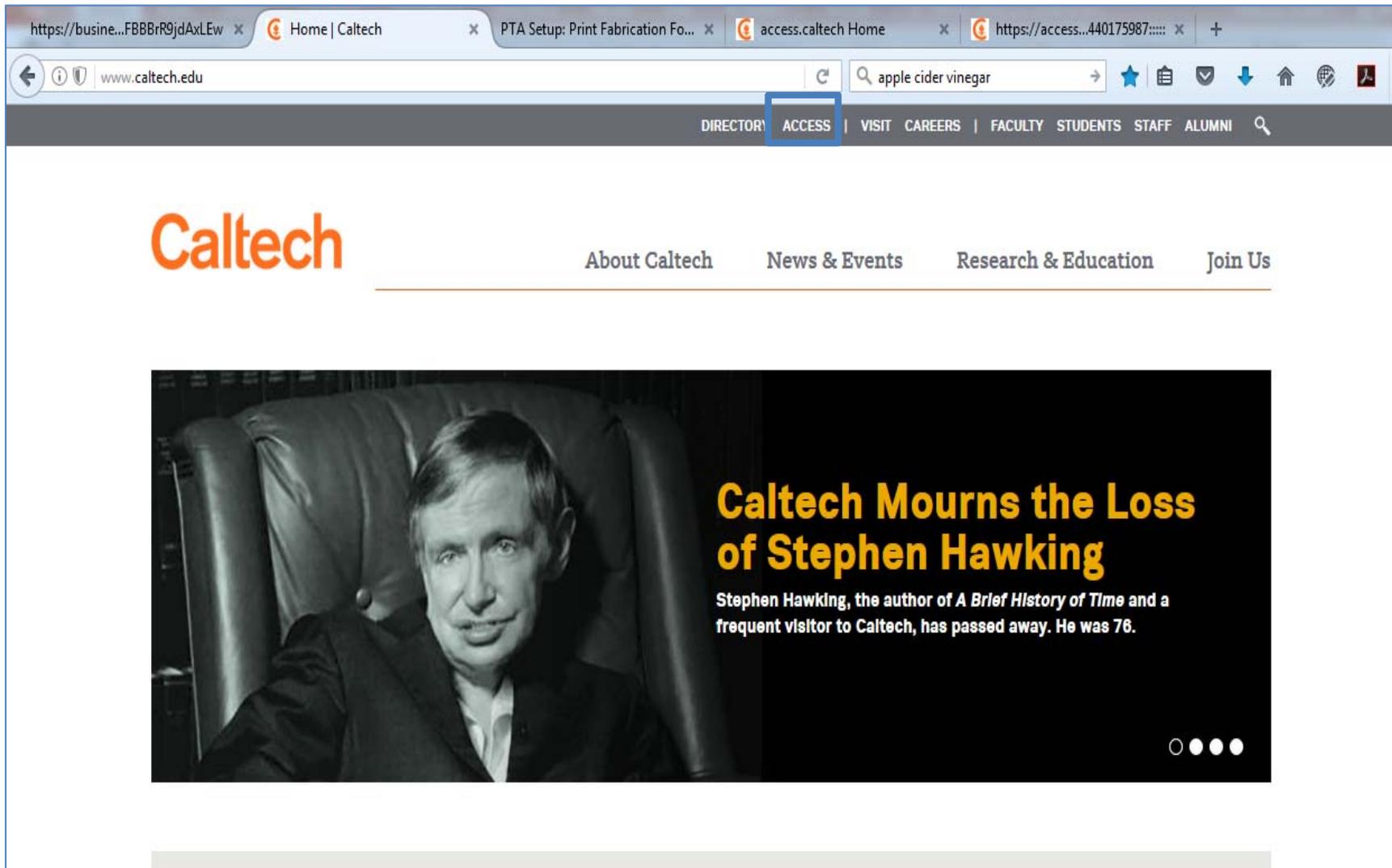
# Comments about Dispositions, Retirements, and Internal Transfers

- Equipment Internal Transfer Form
  - This form is new, and it has not been finalized or implemented yet
  - We will be asking the DA's to provide feedback on this form before finalizing and before implementing
  - In the meantime, notify PS whenever there are plans to perform an Internal Transfer, and PS will provide guidance and obtain the necessary information to process the Internal Transfer of the equipment

# Comments about Dispositions, Retirements, and Internal Transfers

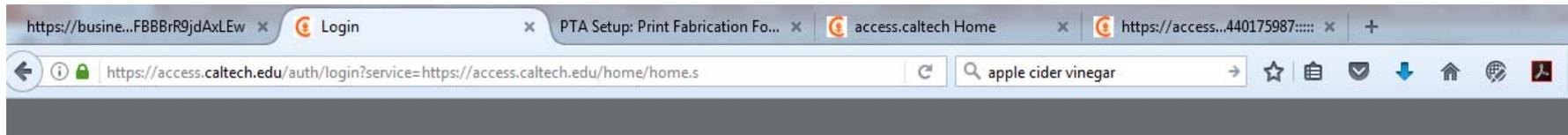
- Movements (change in equipment's location)
  - Report ALL movement of equipment between different research groups, or between rooms in different buildings or sites.
  - You do not need to report movement of equipment between labs if the labs are in the same building and belong to the same PI research group.

# Accessing the ETS



The screenshot shows a web browser window with several tabs. The active tab is 'access.caltech Home'. The address bar shows 'www.caltech.edu' and a search bar contains 'apple cider vinegar'. The navigation menu includes 'DIRECTOR', 'ACCESS', 'VISIT', 'CAREERS', 'FACULTY', 'STUDENTS', 'STAFF', and 'ALUMNI'. The 'ACCESS' menu item is highlighted with a blue box. Below the navigation menu, the Caltech logo is displayed on the left, and a horizontal menu contains 'About Caltech', 'News & Events', 'Research & Education', and 'Join Us'. A large banner image features a black and white portrait of Stephen Hawking in a leather chair. To the right of the portrait, the text reads: 'Caltech Mourns the Loss of Stephen Hawking' in large yellow font, followed by 'Stephen Hawking, the author of *A Brief History of Time* and a frequent visitor to Caltech, has passed away. He was 76.' in white font. A small navigation indicator with four circles is visible in the bottom right corner of the banner.

# Accessing the ETS



**Caltech** access.caltech

Welcome to access.caltech

**Username \***

**Password \***

[\[forgot your password?\]](#)

Sign In >

First time logging in? [Click here](#) If you need assistance, please contact the IMSS Help Desk at 626.395.3500 (M-F, from 8AM to 5PM) or email us at [help@caltech.edu](mailto:help@caltech.edu).

IMPORTANT: Your browser must accept cookies to use access.caltech.

**Links to other applications:**

- ✔ [Admissions Visit Scheduler](#) (?)
- ✔ [AdvanceCaltech](#) (?)
- ✔ [Application Tracking System \(Taleo\)](#) (?)
- ✔ [Box](#) (?)
- ✔ [Caltech Card](#) (?)
- ✔ [Caltech Help](#) (?)
- ✔ [Caltech Ready](#) (?)
- ✔ [CardQuest](#) (?)
- ✔ [Course Management \(Moodle\)](#) (?)
- ✔ [Data Warehouse \(Cognos\)](#) (?)
- ✔ [Email & Calendar - Office 365 Exchange](#) (?)
- ✔ [FAMIS Read-Only](#) (?)
- ✔ [FileBound Document Management](#) (?)

# Accessing the ETS

The screenshot shows a web browser with multiple tabs. The active tab is 'access.caltech Home'. The address bar shows 'https://access.caltech.edu/home/home.s'. The search bar contains 'apple cider vinegar'. The user is logged in as 'Ernest S. Katacha'. The page header includes the Caltech logo and 'access.caltech'. Below the header is a navigation bar with links for 'access.caltech home', 'Manage My Password', and 'Set Security Questions'. The main content area is titled 'Your Online Applications' and is divided into two columns: 'Self Service' and 'Favorites'. The 'Self Service' column lists seven applications with their descriptions and help icons. The 'Favorites' column lists eight applications with star icons for marking as favorites. A note at the bottom of the Favorites section explains how to add an application to the list.

Logged in as **Ernest S. Katacha**. If that is not you, please [click here](#). **LOGOUT ALL HELP**

## Caltech access.caltech

[access.caltech home](#) | [Manage My Password](#) | [Set Security Questions](#)

### Your Online Applications

#### Self Service

- [AiM Customer Portal](#) ? ☆  
*Submit facilities service requests*
- [Caltech Help](#) ? ★  
*Submit and track support requests for IMSS, Card Office, Procurement, and GPS.*
- [Disclose Disability Status \(IE and Safari and Adobe Reader Plugin\)](#) ? ☆  
*View and modify your disclosure disability status*
- [Electronic Paycheck Stub \(Online Payslip\)](#) ? ☆  
*View your electronic paycheck stub*
- [Electronic W2 \(Online W2\)](#) ? ☆  
*View your electronic form W2: Wage and Tax Statement*
- [Gym Membership](#) ? ☆  
*Gym membership management*
- [My Personal Information](#) ? ☆

#### Favorites

- [Caltech Help](#)
- [Cost Transfers](#)
- [Data Warehouse \(Cognos\)](#)
- [Email & Calendar - Office 365 Exchange](#)
- [Equipment Tracking](#)
- [Financial Queries](#)
- [Oracle Applications](#)
- [Repository for Administrative Documents and Records \(RADR\)](#)
- [TechMart Purchasing](#)
- [Time Keeping \(Kronos\)](#)

To add an application to your favorites list, click on the star to the right of the application link.

# Accessing the ETS

The screenshot shows a web browser window with the following details:

- Browser tabs: <https://busine...FBBBrR9jdAxLEw>, [access.caltech Home](https://access.caltech.edu/home/home.s#), [PTA Setup: Print Fabrication Fo...](#), [access.caltech Home](https://access...440175987:....), <https://access...440175987:....>
- Address bar: <https://access.caltech.edu/home/home.s#>
- Search bar:
- Page content: 

View data collected by the TQFR course evaluation application

### Administrative Services

  - [AdvanceCaltech](#) ⓘ ☆  
The Institute's donor management database
  - [Application Tracking System \(Taleo\)](#) ⓘ ☆  
AS OF AUG. 1st: Manage your requisitions and job postings and view submitted applications.
  - [Building Space Data System](#) ⓘ ☆  
Manage data related to buildings and rooms at Caltech
  - [Caltech Card](#) ⓘ ☆  
Check your balances for Board Funds, Copy Credits, Student Credit, SmartCash, etc.
  - [Caltech Ready](#) ⓘ ☆  
Create a continuity plan to help your department be prepared for disasters
  - [CardQuest](#) ⓘ ☆  
Book travel and reconcile travel and purchasing card expenses
  - [Conflict of Interest](#) ⓘ ☆  
Disclose interests that may conflict with Caltech duties
  - [Cost Transfers](#) ⓘ ☆  
Request, approve, and process Cost Transfers
  - [Data Warehouse \(Cognos\)](#) ⓘ ☆  
Campus reporting tool for administrative systems
  - [Equipment Image Viewer](#) ⓘ ☆  
View a photo of Caltech-tagged property
  - [Equipment Tracking](#) ⓘ ☆  
Caltech's capitalized equipment inventory management

# Accessing the ETS

Caltech Equipment Tracking System

Equipment Search | Org Admins | View Only Users | PS Admins | PS Admin Actions | Inventory Period

Home

**SEARCH**

Equipment	Equipment Detail	Location
Asset Number: <input type="text"/>	Description: <input type="text"/>	Ownership: CALTECH
Tag Number: <input type="text"/>	Manufacturer: <input type="text"/>	Site: <input type="text"/>
Assignee: <input type="text"/>	Model Number: <input type="text"/>	Building: <input type="text"/>
Delegate: <input type="text"/>	Serial Number: <input type="text"/>	Room: <input type="text"/>
Status: Active	Major Category: <input type="text"/>	
Division Abbrv: <input type="text"/>	Minor Category: <input type="text"/>	
Department: <input type="text"/>	PO Number: <input type="text"/>	
In Service Start: <input type="text"/>	Invoice Number: <input type="text"/>	
In Service End: <input type="text"/>		
(Example: DD-MON-YYYY)		
Inventoried: <input type="text"/>	Award Number: <input type="text"/>	
	Project Number: <input type="text"/>	

Clear Next

**INSTRUCTIONS**

[Equipment Screening](#): Use this link to ensure that the same or similar piece of equipment is not already available prior to purchase.

For assistance, please contact [Property Services](#).

# 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

**SEARCH**

<u>Equipment</u>	<u>Equipment Detail</u>	<u>Location</u>
Asset Number: <input type="text"/>	Description: <input type="text"/>	Ownership: CALTECH <input type="text"/>
Tag Number: <input type="text"/>	Manufacturer: <input type="text"/>	Site: <input type="text"/>
Assignee: <input type="text"/>	Model Number: <input type="text"/>	Building: <input type="text"/>
Delegate: <input type="text"/>	Serial Number: <input type="text"/>	Room: <input type="text"/>
Status: Active <input type="text"/>	Major Category: <input type="text"/>	
Division Abbrv: <input type="text"/>	Minor Category: <input type="text"/>	
Department: <input type="text"/>	PO Number: <input type="text"/>	
In Service Start: <input type="text"/>	Invoice Number: <input type="text"/>	
In Service End: <input type="text"/> (Example: DD-MON-YYYY)		
Inventoried: <input type="text"/>	Award Number: <input type="text"/>	
	Project Number: <input type="text"/>	

# View and Export Equipment

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

EQUIPMENT REPORT																
Refine Search		New Search		Equipment Request												
Q		Go		Rows	50	Actions										
1 - 50 of 8251																
	Image	Asset #	Tag #	Description	Status	Ownership	Div	Org Name	Assignee	In Service Dt	Inventoried	Inventory Dt	Retired Dt	Life-Mths	Life-Yrs	Manufacturer
		100665	000066400	INFARED IMAGING SYSTEM	ACTIVE	CALTECH	BBE	Caltech	Goentoro, Lea Anastasia	21-SEP-2011	N	24-APR-17			10	LICOR INC
		100666	000066449	HIGH PERFORMANCE CENTRIFUGE	ACTIVE	CALTECH	CCE	Caltech	Dougherty, Dennis A	24-SEP-2011	N	04-APR-17			10	BECKMAN COULTER INC
		100667	000066232	ICE GROWTH CHAMBER	ACTIVE	CALTECH	PMA	Physics Administration	Libbrecht, Kenneth G	30-JUN-2011	N	14-MAR-17			10	FABRICATION
		101665	000066455	MONKEY IMAGING SYSTEM	ACTIVE	CALTECH	BBE	Caltech	Andersen, Richard A	16-JUN-2011	N	17-MAR-17			10	INSIGHT NEUROIMAGING SYSTEMS
		101666	000066456	LASER DEVICE W/ INTEGRATED DRIVE	ACTIVE	CALTECH	EAS	Caltech	Yang, Changhuei	10-OCT-2011	N	28-MAR-17			10	BLUE SKY RESEARCH
		10216	000064614	MICROSCOPE, IR	ACTIVE	CALTECH	GPS		Rossmann, George R	03-JAN-2001	N	10-MAY-17			10	CONTINUUM

# View and Export Equipment

## 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, transfers, add notes, etc. These functionalities will be covered in the next sections.

**Actions:** 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.

EQUIPMENT REPORT															
Refine Search		New Search		Equipment Request											
Q		Go		Rows	50	Actions									
1 - 50 of 8251															
Image	Asset #	Tag #	Description	Status	Ownership	Div	Org Name	Assignee	In Service Dt	Inventoried	Inventory Dt	Retired Dt	Life-Mths	Life-Yrs	Manufacturer
	100665	000066400	INFARED IMAGING SYSTEM	ACTIVE	CALTECH	BBE	Caltech	Goentoro, Lea Anastasia	21-SEP-2011	N	24-APR-17			10	LICOR INC
	100666	000066449	HIGH PERFORMANCE CENTRIFUGE	ACTIVE	CALTECH	CCE	Caltech	Dougherty, Dennis A	24-SEP-2011	N	04-APR-17			10	BECKMAN COULTER INC

# Add 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 only if image already exist

Home / [Equipment Report](#) / Single Equipment View

### EQUIPMENT DETAIL

[Back](#) [Upload Image](#) [Remove Image](#) [Edit Inventory Note](#)

Asset #	100665	Manufacturer Name	LICOR INC	Inventoried	N
Tag #	000066400	Model #	ODYSSEY	Notes	
Description	INFARED IMAGING SYSTEM	Serial #	ODY-3076		
Assignee	Goentoro, Lea Anastasia	PO #	5119660		
Division Name	BBE	Invoice #	151408		
Site	Campus	Multi PTA	N		
Building	Broad Center	PTA	LG2.PROV-1-ENDOW.101240		
Room	231	Organization	Caltech		
Inventory Date	24-APR-17	Major Category	MACHINERY AND EQUIPMENT		
Placed In Service	21-SEP-11	Minor Category	LAB AND RELATED EQUIP		
Date Retired		Equipment Title			
Total Cost	50,334.95	Expenditure	Equipment-Caltech		
Net Book Value	14,261.57	Parent Equip #			
Ownership	CALTECH	Life In Years	10		
Condition Code	4	Life In Months	0		
Parent Tag #		Dept Code	19		
GL Funding Segment	16030008	Dept Name	DIV- BBE; DEPT- BROAD CENTER		
Funding Source Name	CIT	Delegate List			
Note					



# Add Equipment and Tag Images

5. Go to the directory where the images are saved
6. Click *Upload* to add the images

<b>Equipment Search</b>	Org Admins	View Only Users	PS Admins	PS Admin Actions	Inventory Period
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[Home](#) / [Equipment Report](#) / [Single Equipment View](#) / Image Upload

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### IMAGE UPLOAD

Tag Number: 000066400

\* Equipment jpeg:

\* Tag jpeg:

# Equipment Request

1. Choose the Request Type – Retired, Donated, Sold, Trade-in, Internally Transferred, or Externally Transferred
2. Select the check box for the Equipment for your request
3. Click the Take Action Button

**SELECT EQUIPMENT**

Request Type:  Retired  Donated  Sold  Traded-In  Internally Transferred  Externally Transferred  Add Note  Assign Delegate

<input type="checkbox"/>	Asset #	Tag #	Description	Assignee	Division	Site	Building
<input type="checkbox"/>	100665	000066400	INFARED IMAGING SYSTEM	Goentoro, Lea Anastasia	BBE	Campus	Broad Center
<input type="checkbox"/>	100666	000066449	HIGH PERFORMANCE CENTRIFUGE	Dougherty, Dennis A	CCE	Campus	Crellin Laboratory Chemistry
<input type="checkbox"/>	100667	000066232	ICE GROWTH CHAMBER	Libbrecht, Kenneth G	PMA	Campus	Bridge Laboratory, East, West & Annex Physics
<input type="checkbox"/>	101665	000066455	MONKEY IMAGING SYSTEM	Andersen, Richard A	BBE	Campus	Linde Hall of Mathematics and Physics
<input type="checkbox"/>	101666	000066456	LASER DEVICE W/ INTEGRATED DRIVE	Yang, Changhuei	EAS	Campus	Moore Laboratory Engineering & Applied Sciences
<input type="checkbox"/>	10216	000064614	MICROSCOPE, IR	Rossmann, George R	GPS	Campus	Arms Laboratory Geol. and Planet. Sciences
<input type="checkbox"/>	10218	000058250	MICROSLICER	Schwarz, Johannes	BBE	Campus	Kerckhoff Laboratories Biological Sciences
<input type="checkbox"/>	10220	000058254	FREEZER, SUB ZERO	Miranda, Michael (Mike)	BBE	Campus	Beckman Institute/Beckman Institute Auditorium
<input type="checkbox"/>	10222	000058256	MODULE, MAGSTIM	Shimojo, Shinsuke (Shin)	BBE	Campus	Broad Center
<input type="checkbox"/>	10223	000058262	SYSTEM, COOLING	Miranda, Michael (Mike)	BBE	Campus	Kerckhoff Laboratories Biological Sciences

# Equipment Request

4. Enter the information into the fields
  - a. Fields with an asterisk (\*) preceding are required fields for data entry
5. Click the *Submit* button

[Home](#) / [Request List](#) / Retire

## REQUEST RETIRE OF ASSET(S): 100665

\* Retire Date



(Example: DD-MON-YYYY)

Comment

[Back](#)

[Submit](#)

# Equipment Request

## E-mail Notification 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 should review the notification to verify that there are no concerns. [PropertyServices@caltech.edu](mailto:PropertyServices@caltech.edu).

From: PropertyServices@caltech.edu  
To: Kumar, Radha  
Cc:  
Subject: Request for Equip Tag #NT000060217

Sent: Thu 2/2/2012 10:34 AM

Linda Powell has requested the following:

Requested Action: Equipment to be SOLD  
Tag #: NT000060217  
Asset #: 20660  
Assignee: Watanabe, Larry Y  
Description: SWITHC, 12-PORT GBIC GIGABIT  
Site: Campus  
Location: Steele Laboratory Appl. Physics and Elect. Engrng. - Room:205  
Cost: \$5,430.11

Also notified: Larry Watanabe, Linda Powell, Radha Kumar, Steve Shu, Susan Dollar

Property Services typically completes their reviews and records these actions in Oracle within 10 days of this email. When the requested actions have been recorded in Oracle Fixed Assets, you will be notified again by e-mail.

If you have any questions about these requests, please contact Property Services at [PropertyServices@caltech.edu](mailto:PropertyServices@caltech.edu).

# Equipment Request

## Approval of Disposition Request and Confirmation of Recording in Oracle Fixed Asset

When the EDC process is completed, and the retirement/disposition has been reflected in the Fixed Asset system, ALL parties authorized access to the equipment will receive another e-mail notification verifying that the equipment has been retired/disposed in the system.

From: PropertyServices@caltech.edu  
To: Kumar, Radha  
Cc:  
Subject: Request for Equip Tag #NT000058565

The following equipment requests are now recorded in Oracle Fixed Assets:

Steve Shu has requested the following:

Requested Action: Equipment has been RETIRED  
Approved by: Tuyen Dang  
Tag #: NT000058565  
Asset #: 10337  
Assignee: Watanabe, Larry Y  
Description: MODULE, ROUTE SWITCH  
Site: Campus  
Location: Steele Laboratory Appl. Physics and Elect. Engrng. - Room:23  
Cost: \$13,428.15

Also notified: Larry Watanabe, Linda Powell, Radha Kumar, Steve Shu, Susan Dollar, Tuyen Dang

If you have any questions about these requests, please contact Property Services at [PropertyServices@caltech.edu](mailto:PropertyServices@caltech.edu).

# Equipment Request

## 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

Home / Request List

**SELECT EQUIPMENT**

Request Type:  Retired  Donated  Sold  Traded-In  Internally Transferred  Externally Transferred  Add Note  Assign Delegate

<input type="checkbox"/>	Asset #	Tag #	Description	Assignee	Division	Site	Building	Room	In Service Date	Image
<input type="checkbox"/>	100665	000066400	INFARED IMAGING SYSTEM	Goentoro, Lea Anastasia	BBE	Campus	Broad Center	231	21-SEP-11	

1 - 1

1 - 1

[Back to Search](#) [Take Action](#)

# Equipment Request

## Add a Note to an Equipment Record

4. Add your note
5. Click *Submit/Resubmit*

## Caltech Equipment Tracking System

Equipment Search

Org Admins

View Only Users

PS Admins

PS Admin Actions

Inventory Period

[Home](#) / [Request List](#) / Add Note

### ADD NOTE TO EQUIPMENT: 100665

Asset #	Note
100665	

Back

Submit/Resubmit

<

>

# Equipment Request

## Add a Note to an Equipment Record

Notes added will appear on the Equipment Record in the last column to the right.

**Caltech** Equipment Tracking System

engalula Home Help Exit Logout All

✓ Comments were updated for equipment : 100665

Equipment Search Org Admins View Only Users PS Admins PS Admin Actions Inventory Period

Home / Request List / Add Note

### ADD NOTE TO EQUIPMENT: 100665

Asset #	Note
100665	

Back Submit/Resubmit

### INSTRUCTIONS

For Note field:

Allowable characters: Letters, numbers, the "at" sign (@), the "pound" sign (#), period, underscore and hyphen.

# Equipment Request

## 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

**SELECT EQUIPMENT**

Request Type:  Retired  Donated  Sold  Traded-In  Internally Transferred  Externally Transferred  Add Note  Assign Delegate

1 - 1

<input checked="" type="checkbox"/>	<u>Asset #</u>	<u>Tag #</u>	<u>Description</u>	<u>Assignee</u>	<u>Division</u>	<u>Site</u>	<u>Building</u>	<u>Room</u>	<u>In Service Date</u>	<u>Image</u>
<input checked="" type="checkbox"/>	100885	000088400	INFARED IMAGING SYSTEM	Goentoro, Lea Anastasia	BBE	Campus	Broad Center	231	21-SEP-11	

1 - 1

# Equipment Request

## Add Delegate(s) to Equipment

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

[Home](#) / [Request List](#) / Assign Delegates

### MANAGE EQUIPMENT DELEGATES

Instruction: You have the right to assign delegate to the following equipment:

For All Assets Listed Below:  Assign New Delegate  
 Remove Current Delegate  
 Replace Current Delegate with New

New Delegate:  ^

Tag Number	Description	Assignee	Division Name	Delegates
000066400	INFRARED IMAGING SYSTEM	Goentoro, Lea Anastasia	BBE	

1 - 1

Cancel

Apply

# Actions

## 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.

The screenshot displays the 'EQUIPMENT REPORT' interface. At the top, there are three buttons: 'Refine Search', 'New Search', and 'Equipment Request'. Below these is a search bar with a magnifying glass icon and a 'Go' button. To the right of the search bar, it shows 'Rows 50' and an 'Actions' dropdown menu. The 'Actions' menu is open, showing options: 'Select Columns', 'Filter', 'Rows Per Page', 'Format', 'Save Report', 'Reset', 'Help', and 'Download'. The table below has columns: Image, Asset #, Tag #, Description, Ownership, Div, Org Name, Assignee, In Service Dt, Inventoried, Inventory Dt, and Retired. The first row is highlighted, and the 'Actions' menu is positioned over it.

	Image	Asset #	Tag #	Description	Ownership	Div	Org Name	Assignee	In Service Dt	Inventoried	Inventory Dt	Retired
		100665	000066400	INFRARED IMAGING SYSTEM	CALTECH	BBE	Caltech	Goentoro, Lea Anastasia	21-SEP-2011	N	24-APR-17	
		100666	000066449	HIGH PERFORMANCE CENTRIFUGE	CALTECH	CCE	Caltech	Dougherty, Dennis A	24-SEP-2011	N	04-APR-17	
		100667	000066232	ICE GROWTH CHAMBER	ACTIVE	CALTECH	PMA Physics Administration	Libbrecht, Kenneth G	30-JUN-2011	N	14-MAR-17	
		101665	000066455	MONKEY IMAGING SYSTEM	ACTIVE	CALTECH	BBE	Andersen, Richard A	16-JUN-2011	N	17-MAR-17	
		101666	000066456	LASER DEVICE W/ INTEGRATED DRIVE	ACTIVE	CALTECH	EAS	Yang, Changhuei	10-OCT-2011	N	28-MAR-17	

# Actions

## 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

The screenshot shows the 'EQUIPMENT REPORT' interface. At the top, there are buttons for 'Refine Search', 'New Search', and 'Equipment Request'. Below these is a search bar with a magnifying glass icon and a 'Go' button. To the right of the search bar, it says 'Rows: 50' and 'Actions'. The main table has columns for 'Image', 'Asset #', 'Tag #', 'Description', and 'Assignee'. The 'Assignee' column lists names like 'Goentoro, Lea Anastasia', 'Dougherty, Dennis A.', 'Libbrecht, Kenneth G', and 'Andersen, Richard A.'. A 'Select Columns' dialog box is open in the foreground, showing a list of columns to be displayed in the report. The columns listed are: Image, Asset #, Tag #, Description, Status, Ownership, Div, Org Name, Assignee, In Service Dt, and Inventoried. The dialog box has 'Do Not Display' and 'Display in Report' sections, with arrows for moving columns between them and up/down arrows for reordering. There are 'Cancel' and 'Apply' buttons at the bottom of the dialog box.

# Actions

## 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.

The screenshot displays an 'EQUIPMENT REPORT' interface. At the top, there are three buttons: 'Refine Search', 'New Search', and 'Equipment Request'. Below these is a search bar with a magnifying glass icon, a 'Go' button, a 'Rows' dropdown set to '50', and an 'Actions' dropdown. A status indicator shows '1 - 50 of 8251'. The main area is a table with columns: Image, Asset #, Tag #, Description, Status, Ownership, Div, Org Name, Assignee, In Service Dt, Inventoried, and Invent. The table contains four rows of equipment data. A 'Filter' dialog box is open over the table, showing 'Filter Type' with 'Column' selected. The 'Column' dropdown is set to 'Asset #', the 'Operator' dropdown is set to '=', and the 'Expression' field is empty. The dialog has 'Cancel' and 'Apply' buttons at the bottom.

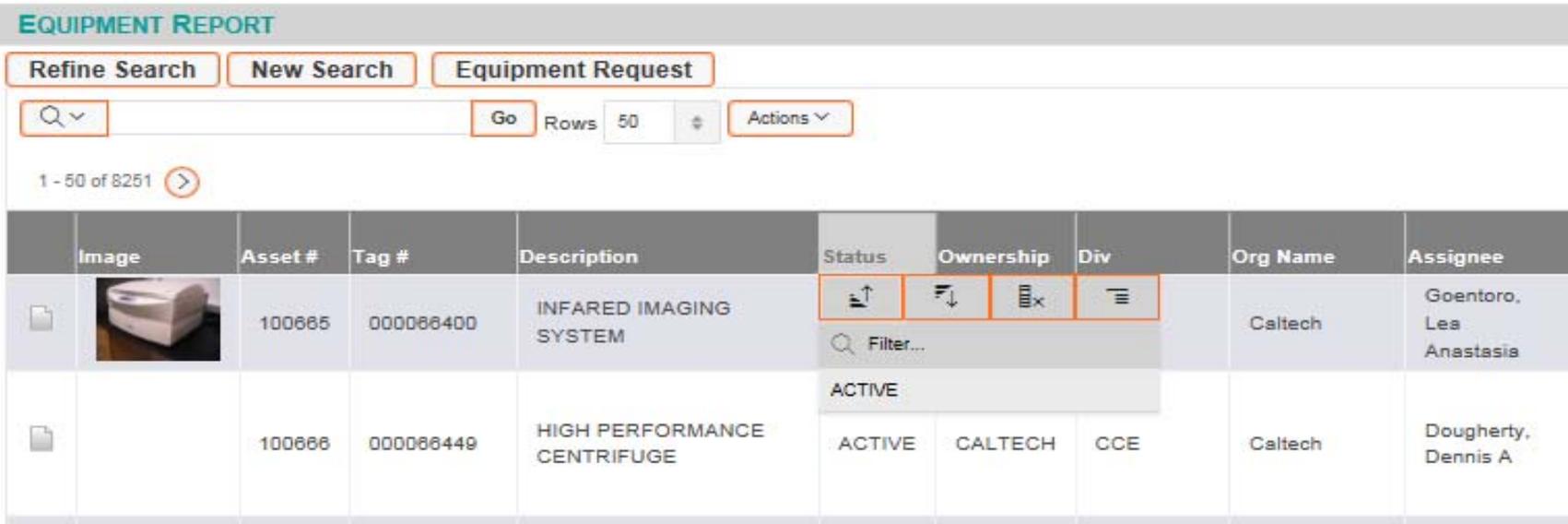
Image	Asset #	Tag #	Description	Status	Ownership	Div	Org Name	Assignee	In Service Dt	Inventoried	Invent
	100665	000066400	INFARED IMAGING SYSTEM					Greene			24-A
	100666	000066449	HIGH PERFORMANCE CENTRIFUGE								04-A
	100667	000066232	ICE GROWTH CHAMBER								14-M
	101665	000066455	MONKEY IMAGING SYSTEM					Richard A	2011		17-M

# Actions

## Filter on Columns

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



The screenshot shows an "EQUIPMENT REPORT" interface. At the top, there are buttons for "Refine Search", "New Search", and "Equipment Request". Below these is a search bar with a magnifying glass icon and a "Go" button. To the right of the search bar, it says "Rows 50" with a plus-minus icon and an "Actions" dropdown menu. Below the search bar, it says "1 - 50 of 8251" with a right arrow icon. The main table has the following columns: Image, Asset #, Tag #, Description, Status, Ownership, Div, Org Name, and Assignee. The first row has an image of a white device, Asset # 100665, Tag # 000066400, Description "INFRA RED IMAGING SYSTEM", Status "ACTIVE", Ownership "CALTECH", Div "CCE", Org Name "Caltech", and Assignee "Goentoro, Lea Anastasia". A dropdown menu is open over the Status column for the first row, showing options: "Filter...", "ACTIVE", and "ACTIVE".

Image	Asset #	Tag #	Description	Status	Ownership	Div	Org Name	Assignee
	100665	000066400	INFRA RED IMAGING SYSTEM	ACTIVE	CALTECH	CCE	Caltech	Goentoro, Lea Anastasia
	100666	000066449	HIGH PERFORMANCE CENTRIFUGE	ACTIVE	CALTECH	CCE	Caltech	Dougherty, Dennis A

# Actions

## 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.

The screenshot shows the 'EQUIPMENT REPORT' interface. At the top, there are buttons for 'Refine Search', 'New Search', and 'Equipment Request'. Below these is a search bar with a magnifying glass icon and a 'Go' button. To the right of the search bar, it says 'Rows 50' with a dropdown arrow. An 'Actions' dropdown menu is open, showing options: 'Select Columns', 'Filter', 'Rows Per Page' (which is highlighted and has a submenu open), 'Format', 'Save Report', 'Reset', 'Help', and 'Download'. The 'Rows Per Page' submenu shows options: 1, 5, 10, 15, 20, 25, 50 (which is selected), 100, 1000, and All. Below the search bar, there is a 'Status' filter set to 'ACTIVE' and a pagination indicator '1 - 50 of 8251'. The main table has columns: 'Image', 'Asset #', 'Tag #', 'Description', 'Org Name', and 'Assignee'. The table contains three rows of equipment data.

Image	Asset #	Tag #	Description	Org Name	Assignee
	100665	000066400	INFRARED IMAGING SYSTEM	Caltech	Goentoro, Lea Anastasia
	100668	000066449	HIGH PERFORMANCE CENTRIFUGE	CALTECH	Dougherty, Dennis A
	100667	000066232	ICE GROWTH CHAMBER	CALTECH	Libbrecht, Kenneth G

# Actions

## 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 sort occur.

The screenshot shows an 'EQUIPMENT REPORT' interface. At the top, there are tabs for 'Refine Search', 'New Search', and 'Equipment Request'. Below these are search and filter controls, including a search box, a 'Go' button, 'Rows' set to 50, and an 'Actions' dropdown. A 'Status' filter is set to 'ACTIVE'. The main area is a table with columns: Image, Asset #, Tag #, Description, Ownership, Div, Org Name, Assignee, and In Service. A 'Sort' dialog box is overlaid on the table, allowing selection of columns and sort directions. The dialog has a title bar with a close button (X) and a table with the following structure:

	Column	Direction	Null Sorting
1	- Select Column -	Ascending	Default
2	- Select Column -	Ascending	Default
3	- Select Column -	Ascending	Default
4	- Select Column -	Ascending	Default
5	- Select Column -	Ascending	Default
6	- Select Column -	Ascending	Default

At the bottom of the dialog are 'Cancel' and 'Apply' buttons. The background table shows rows of equipment data, including 'INFARED IMAGING SYSTEM', 'HIGH PERFORMANCE CENTRIFUGE', 'ICE GROWTH C...', 'MONKEY IMAG SYSTEM', and 'LASER DEVICE W/...'. The 'In Service' dates range from 21-SEP-2011 to 10-OCT-2011.

# Actions

## Highlight

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

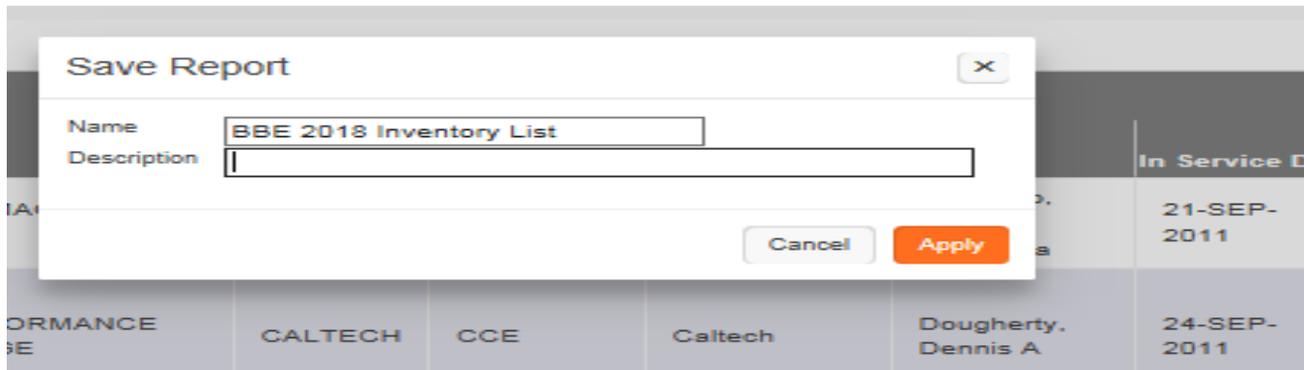
The screenshot shows an 'EQUIPMENT REPORT' interface. At the top, there are buttons for 'Refine Search', 'New Search', and 'Equipment Request'. Below these is a search bar with a 'Go' button, a 'Rows' dropdown set to '50', and an 'Actions' dropdown. A 'Status' filter is set to 'ACTIVE'. The main table displays equipment records with columns for Image, Asset #, Tag #, Description, Inventory Dt, and Retire. A 'Highlight' dialog box is open in the foreground, allowing configuration of highlighting rules. The dialog includes fields for Name, Sequence (10), Enabled (Yes), Highlight Type (Row), Background Color, Text Color, and Highlight Condition (Column: Image, Operator: =, Expression: ). Color selection options for background and text are shown as [yellow] [green] [blue] [orange] [red].

Image	Asset #	Tag #	Description	Inventory Dt	Retire
	100665	000066400	INFARED IM SYSTEM	24-APR-17	
	100666	000066449	HIGH PERF CENTRIFUG	04-APR-17	
	100667	000066232	ICE GROWT	14-MAR-17	
	101665	000066455	MONKEY IM SYSTEM	17-MAR-17	
	101666	000066456	LASER DEV INTEGRATED DRIVE	28-MAR-17	

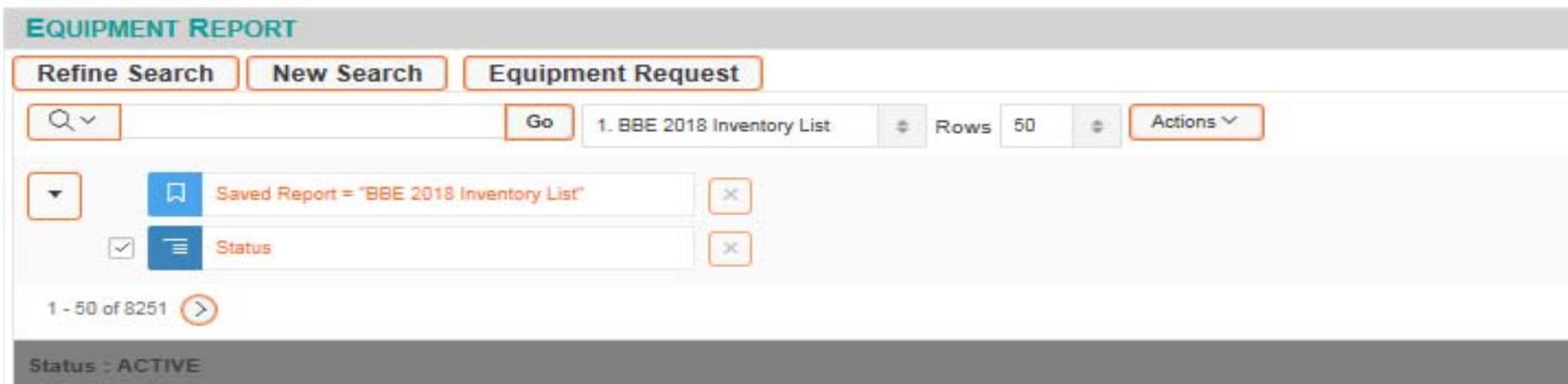
# Actions

## 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.



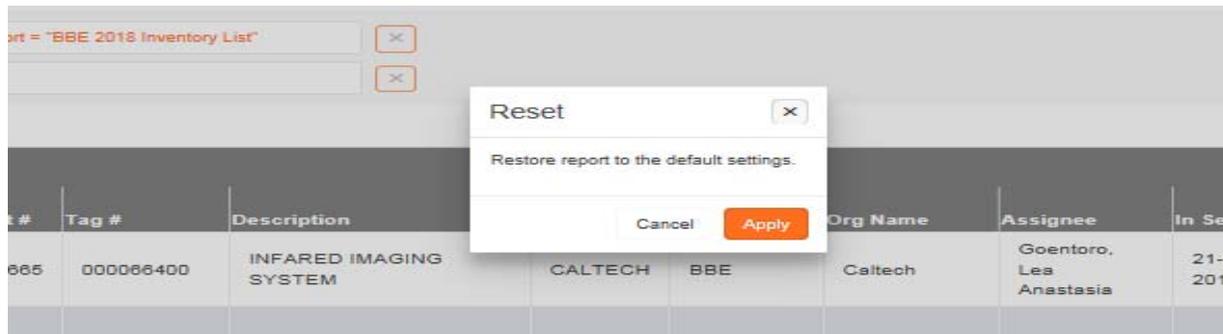
Upon saving, a list of reports will now be available each time you run an equipment search.



# Actions

## Reset

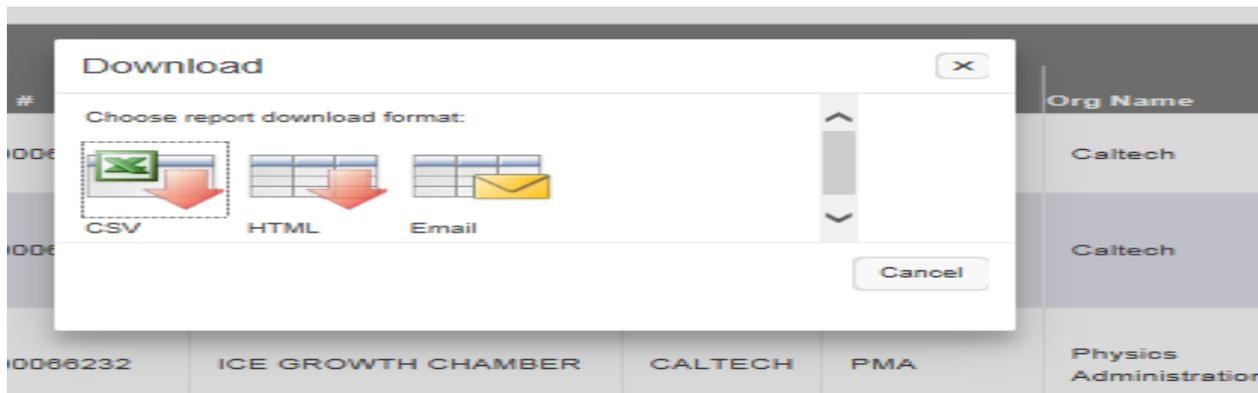
*Reset opens a window to validate that you would like to restore the report to the default settings.*



## Help

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

## Download



# Future Automation

## Future Plans for Improving ETS

- Investigate the feasibility of Integrating some automation in ETS to accommodate processing of equipment retirements, disposals, and transfers (EDC process and Internal Transfers)
- Investigate the feasibility of including on-line certifications of EDC Reports
- The hope is to reduce or eliminate a paper driven process

# ETS Help

A copy of ETS user guide is available online. Click on the “Help” url located on the upper left corner of the ETS home screen.

**Caltech** Equipment Tracking System

engalula Home **Help** Exit Logout All

Equipment Search Org Admins View Only Users PS Admins PS Admin Actions Inventory Period

Home

**SEARCH**

<u>Equipment</u>	<u>Equipment Detail</u>	<u>Location</u>
Asset Number: <input type="text"/>	Description: <input type="text"/>	Owner: CALTECH <input type="text"/>
Tag Number: <input type="text"/>	Manufacture: <input type="text"/>	Site: <input type="text"/>
Assignee: <input type="text"/>	Model Number: <input type="text"/>	Building: <input type="text"/>
Delegate: <input type="text"/>	Serial Number: <input type="text"/>	Room: <input type="text"/>

**INSTRUCTIONS**

**Equipment Screening:**  
Use this link to ensure that the same or similar piece of equipment is not already available prior to purchase.

For assistance, please contact **Property Services**.

# ETS Help

Note: The screen shots on the user guide may look different but the process is the same.

Please contact Ernest Katacha (x-4181), Tan Benjakalyakorn (x-2556) or Tim Winiecki (x-8192) if you need further help.

<http://finance.caltech.edu/PropertyServices>

**caltech.edu**