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Electronic Equipment Movement Record System, User's Guide

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Publication Date

1992-09-01

PMAS

*Electronic
Equipment Movement Record
System*

User's Guide

Lawrence Berkeley Laboratory
University of California
September 21, 1992

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Prepared by Linda M. Suarez

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Preface

This manual explains how to use the Lawrence Berkeley Laboratory (LBL) Electronic Equipment Movement Record (EEMR) System. It is a reference with examples and display images that illustrate the various options available to the user.

This manual is primarily intended for LBL employees. LBL guests and non-employees are not allowed to record equipment movements or be listed as equipment custodians.

The EEMR System is designed to be used by different types of users. A very broad description of how each user may use the EEMR System follows:

- **Creators** are all LBL employees (guests and other non-employees are exempt). Creators may create or edit their own EEMRs.
- **Division Administrators** (or their designees) will have initial EEMR review and approval authority.
- **Property Accounting** will have EEMR review only authority.
- **Property Management** will have final EEMR review and approval authority.

Each type of user will be allowed to perform specific activities. Menus have been designed and implemented which display for each user those activities they are authorized to perform.

The intended audience of the EEMR User's Guide is the Creator. Addendums to this guide will be available for Division Administrators, Property Accounting and Property Management. The *EEMR User's Guide* is available from Property Management.

Questions or comments may be directed to the Property Management Office.

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Introduction

The Property Management and Accounting System (PMAS) is a collection of programs, data files, devices, documents and procedures which provide physical and financial control of movable laboratory assets. Almost all of the PMAS data files and programs reside on the central administrative IBM mainframe computer in Building 50B. In the past, property location changes were performed by Property Management personnel upon receipt of a Equipment Movement Record (EMR) (Form No. 7600-59226 Rev. 3/88).

LBL's Electronic Equipment Movement Record (EEMR) System resides on the VAX cluster. It is a tool for entering property movement changes on-line; in effect, creating electronic EMRs. These include changes to building number, room number, area, user account, user employee number and user name. This system has been designed for general use so that LBL employees can more readily record property movements. It is an enhancement to the PMAS, not a replacement. Employees may still complete an EMR paper form and submit it to Property Management.

The objective of this enhancement is to provide an on-line "EMR form" for updating property custodian and location records in a distributed environment, while maintaining process review and approval authority. Because employees will be electronically submitting an EMR and not actually updating the files in the PMAS, the EEMR System will ensure adequate security of the files. Also, because many errors can be trapped at the time of the electronic submission, the EEMR System will ensure that more accurate data is entered into the files. Several existing LBL databases will be accessed for data verification. Therefore, data consistency and accuracy will be ensured and duplication of data will be kept to a minimum.

Overview

The EEMR System is a menu-driven system consisting of four main functions. These functions are creating/editing EEMRs, reviewing/approving EEMRs, reporting, and Property Management tools.

All LBL employees are allowed to create and edit their own EEMRs (including delete). However, creators may only edit EEMRs which they themselves created. Also, once an EEMR has been approved by the Division Administrator¹ and/or Property Management, it may not be changed or deleted.

Review and approval of EEMRs occurs in two stages. Once created, an EEMR is pending approval. The Division Administrator is notified of the pending EEMR and may then review it, approve or disapprove of it. If approved, the EEMR is then reviewed by Property Management. Upon approval by Property Management, the EEMR is transferred to the administrative IBM computer for update to the PMAS files. Updates occur nightly.

Standard reports will be provided to obtain statuses and other information.

Property Management will be provided several tools to aid in maintenance of the EEMR System, such as the ability to register users, control user access and maintain a building and room number database which supplements Plant Engineering's building and room number database.

1. In this document, Division Administrator connotes Division Administrator and his/her designee.

Access

The EEMR System is available via the Toolkit on the VAX CSA1 computer. The Toolkit is a menu-driven software application that provides LBL staff access to, and reports from, LBL's central administrative data. The original data (including ledger, purchasing, stores, travel, etc.) are stored in a variety of mainframes and PCs. To make this information readily available, a copy is stored on the VAX computer in FOCUS files.

FOCUS is a "fourth generation" computer language which contains a versatile set of programming tools for entering, maintaining, retrieving and analyzing data. It contains a powerful report generation facility that allows for the rapid creation of sophisticated and complex reports as well as simple tabular output.

If you are not familiar with logging onto the VAX computer or have not used Toolkit before, please read Appendix A: Getting Started. The information in Appendix A is the same information that may be found in the *Toolkit User's Guide*, available from Data Processing Services.

```

Welcome to Data Processing Service's Toolkit
*****
Please select an Option -
Options:
  Account Master
  Effort/Contract Labor
  Job Order
  Ledger (Detail or General)
  People/Personnel/Training
  Property Management
  Purchase Order
  Sponsored Research
  Stores
  Travel
  Warehouse (WASP)

Utilities in the Toolkit
Help with the Toolkit
Leave Toolkit
Exit from Focus

```

Toolkit main menu

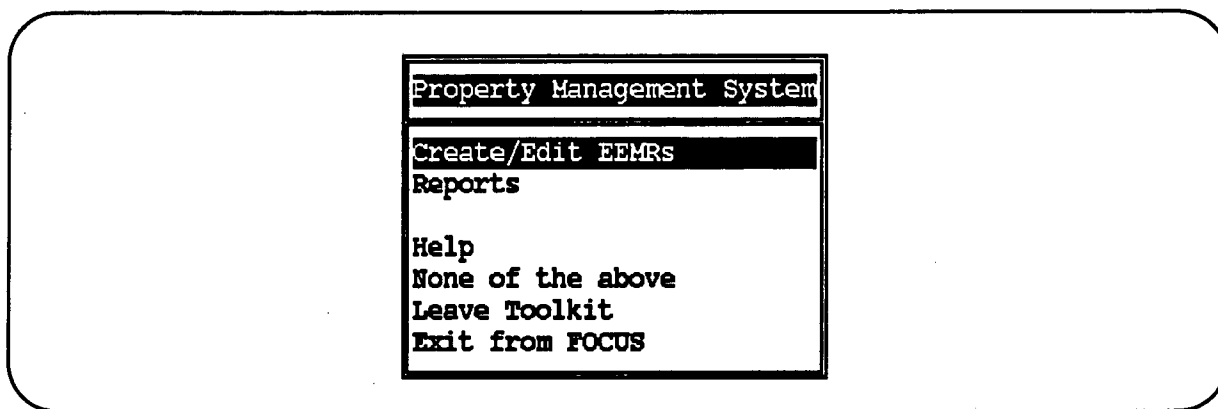
eeemr1

If you have used Toolkit before, you will recognize the Toolkit's main menu. The EEMR System is a function of Property Management and may be accessed by moving the highlight bar to *Prop-*

erty Management and pressing the RETURN key. A new window menu will appear on the screen containing all the options for which you are authorized to perform. For example, a new user or creator will not see the option *Approve EEMRs* on the window menu as only Division Administrators and Property Management may perform this function. All window menus will provide the ability to quit. By choosing *None of the above*, you will return to the previous menu, or by choosing *Exit from FOCUS*, you will return to the VAX prompt (CSA1>) where you may log off the computer.

Creator

When you choose Toolkit option: *Property Management*, you will see the Property Management System menu window appear on the screen. This menu displays the options that you are authorized to perform. Creators are allowed to *Create/Edit EEMRs* and obtain *Reports*.



Toolkit window: Property Management menu window

eemr2

The EEMR System is designed to be used by different types of users, each with authorization to perform specific functions. Whenever you choose Toolkit option: *Property Management*, Toolkit obtains your authorization. Depending on your authority, Toolkit then displays additional options. Property Management will maintain the EEMR Registration/Authorization database. New users, however, will be allowed to register themselves on a first time only basis.

Registration/Authorization

The first time you select Property Management option: *Create/Edit EEMRs*, you will be greeted with a screen notifying you that you must be registered to continue. You will then be allowed to register on-line, and you will be given **creator** authority. A creator is any LBL employee (Students, guests and other non-employees are not allowed to access the EEMR System.). All other authorizations must be registered by Property Management.

For information on options *Create/Edit EEMRs* and *Reports*, see section: Creator Activities.

```
Lawrence Berkeley Laboratory - Property Management and Accounting System
Electronic Equipment Movement Record (EEMR) System

*****
*
* You must be an authorized user to access the Electronic EMR  *
* System. Authorization is required only once per userid.    *
* Please enter the required information below to be authorized.*
*
*****

Userid:      jdoe
Employee No: 123456
Last Name:   doe
First Name:  john

                                (Exactly as shown on ID card)
                                (Exactly as shown on ID card)

Option:  A - Authorize userid   X- Quit
```

eemr3

Create/Edit EEMRs: registration screen

Userid

The EEMR System will lookup, and display on the screen, the userid you used to log onto the VAX. Your userid is important to the EEMR System. It is used to identify you. Your userid is stored with an EEMR and identifies that EEMR as yours and yours alone. Authorizations are given to userids.

Creator Activities

As stated in the LBL Regulations and Procedures Manual, it is necessary to document the movement of property or the permanent reassignment of property from one employee to another. While Stock Form 7600-59226, *Equipment Movement Record*, may still be used, you may now document property movement electronically by creating an EEMR.

Create/Edit EEMRs

When you select Property Management option: *Create/Edit EEMRs*, you will see the *opening* screen. If you are a first time user, you will be required to register yourself (see section: Creator for more information). After you register, you will see the *opening* screen.

Lawrence Berkeley Laboratory - Property Management and Accounting System
Electronic Equipment Movement Record (EEMR) System

Property No:

Enter Property Number (or leave blank to quit)

eemr4

Create/Edit EEMRs: opening screen

Enter the property number of the property item for which you wish to create or edit EEMR. The property number may be found on a white and black, DOE/LBL barcode label located on the property item.

Once you have entered the property number, the EEMR System will perform a quick search of the EEMR database to see if any EEMRs already exist for this property item. If so, you will be notified as to when and who created the EEMRs, but you will not be allowed to view the movements recorded. After the system performs the search for EEMRs, you will see the Create/Edit EEMRs main menu.

If a property number has existing EEMRs, they will be displayed. For each EEMR, you will see the following information.

EEMR No. This number is assigned to an EEMR and must be used to identify which

EEMR is to be edited or deleted. This number has no meaning outside of the *Create/Edit EEMRs* main menu. If an EEMR was not created by you or was approved or held by the Division Administrator or Property Management, you will not be able to edit it. An asterisk (displayed in the third column) following the EEMR No. will indicate an EEMR that cannot be edited.

Create Date/Time This is the EEMR date/time stamp. This will not change, even if you edit the EEMR. It is the EEMR key and, other than informing you as to when you created the EEMR, is used primarily by the EEMR System to distinguish one EEMR from another.

Approval DA/PM If the Division Administrator and/or Property Management has taken some approval action on your EEMR, you will be notified here. Actions include: approve, disapprove and hold. If an approve or hold action was taken, you will not be allowed to edit the EEMR. You may edit disapproved EEMRs.

Created by This is the name of the employee who created the EEMR.

Comments If comments are attached to an EEMR, you will see a Y here. These may be comments that you included or comments that the Division Administrator or Property Management entered. If an N appears here, no comments are attached to this EEMR.

```

Lawrence Berkeley Laboratory - Property Management and Accounting System
      Electronic Equipment Movement Record (EEMR) System

  Current      EEMR      Create      Approval
Property No.  No. *    Date       Time       DA    PM    Created by    Comments
-----
6154276

                                No EEMRs pending for Division Administrator or
                                Property Management approval

-----
Option:                                Enter: n
  Create a new EEMR:                    N
  Get another property number:           P
  Exit the EEMR System:                  X

The EEMR database has no pending transactions for 6154276 .
    
```

Create/Edit EEMRs: main menu

eemr5

In our example, 6154276 is the current property number, and no EEMRs currently exist. Any actions taken on this screen will occur on 6154276. If you wish another property number, enter a

p. You will be prompted for a new property number. The system will perform a quick search for EEMRs and redisplay the above screen with the new current property number.

If you wish to leave *Create/Edit EEMRs*, enter an x to quit. You will be returned to the Toolkit: *Property Management* menu window where you may choose other options or leave the Toolkit.

Actions which you may take on the current property number are: *Create a new EEMR*, *Edit an existing EEMR*, and *Edit EEMR comments only*. Each is described in detail in the following subsections.

Create a new EEMR

As no EEMRs currently exist for property number 6154276, *Edit/delete EEMR* and *Edit/delete EEMR comments only* actions are not shown on the *Create/Edit EEMRs* main menu. These are valid actions only if EEMRs exist (as you will note later). If you wish to create an EEMR, at *Option*, enter an n. The system will perform a lookup on the LBL PMAS files and return information on the current status of the property. You will be shown this information and given the opportunity to make changes.

```

Lawrence Berkeley Laboratory - Property Management and Accounting System
      Electronic Equipment Movement Record (EEMR) System

Property No: 6154276          Sensitive:      Yes
Manufacturer: IBM           Acquired Date: 89/09
Description: COMPUTER-PC PS2 80  Purchase Acct: 3025-01
Model: 8580                 Prop of Others:
Serial No: 72-7074161

Current Status:              New EEMR: 6154276 92/04/02 14.54.03
  Bldg. No: 065              69
  Room No: 0108              103
  Area:                       █
  User Acct: 3025-01         3033 - 50
  Employee No: 257751 ( SUAREZ LM ) 257751 ( SUAREZ LM )

-----
Option:  S                    Use TAB to move between fields
  S - Send EEMR              H - Help
  D - Delete EEMR           X - Cancel changes      blank - Verify changes

```

eemr6

Create/Edit EEMRs: edit data screen

Displayed at the top half of the *edit data* screen is information about the property item: manufacturer, description, model, serial no., when it was acquired, on what account it was purchased, if it is property of others, and if it is sensitive. This information may not be changed. In the lower left part of the screen, you will see the current location of the property. This information also may not be changed. In the middle right side of the screen you will see, highlighted, the current property number and a date/time stamp. Beneath this are the fields that make up the EEMR. Enter in these fields the changes you wish to make. If you do not wish to change an entry, simply tab over it to

the next entry.

If you wish to view on-line help, you may, at any time, tab to *Option* and enter an **H**. The help screen displayed gives a brief description and then directs you to the data entry field help screens for more information.

Create/Edit EEMRs - HELP

Page 1 of 1

Help is available for each of the fields that you may change: Bldg No., Room No., Area, User Acct., and Employee No. To view help for a specific field, enter an **H** in the desired field and press the RETURN (or ENTER) key. Example, to view help for area field, enter an **H** in the area field (i.e., Area: h). You must blank the rest of the field so that h is the only character in the field.

More information is available in the EEMR System User's Guide available from Property Management.

Press ENTER to continue ...

Create/Edit EEMRs: general help screen

eemr37

Bldg. No: This is a required field. Building numbers are validated against the current building and room file maintained by Plant Engineering and also an additional building and room file maintained by Property Management. If you wish to review the on-line help, enter an **H** in the field (blank out the rest of the field). If you wish a list of valid building numbers from which to choose, enter an **L** in the field (blank out the rest of the field). See Appendix B - Location Formats and Codes for more information.

Room No: This is a required field. Room numbers are validated against the current building and room file maintained by Plant Engineering and also an additional building and room file maintained by Property Management. If you wish to review the on-line help, enter an **H** in the field (blank out the rest of the field). If there is no room number (perhaps the property item is outside), you may enter a standard area code. If you wish a list of valid room numbers and standard area codes from which to choose, enter an **L** in the field (blank out the rest of the field). See Appendix B - Location Formats and Codes for more information.

Area: This is not a required field, blanks are accepted. If you wish to enter more specific information as to the location of a property item, enter it here. Property Management provides a list of standard area codes. Use these wherever possible. If a standard area code does not meet your needs, make up your own code (try to use codes with obvious meanings) or contact Property Management for assis-

tance. If you wish to review the on-line help, enter an **H** in the field (blank out the rest of the field). If you wish a list of the standard area codes from which to choose, enter an **L** in the field (blank out the rest of the field). See Appendix B - Location Formats and Codes for more information.

User Acct: This is required, blanks are not accepted. Account numbers are validated against the current general ledger master file.

Employee No: This is required, blanks are not accepted. Employee numbers are validated against the current personnel file. If you wish to review the on-line help, enter an **H** in the field (blank out the rest of the field). If you wish a list of valid room numbers and standard area codes from which to choose, enter an **L** in the field (blank out the rest of the field). If you do not know the employee number, enter an **L** in the field (blank out the rest of the field). The EEMR System will display a screen where you will be allowed to enter an employee's last name, or part of a last name. The system will then search for, and display, any matches along with respective employee numbers. When you choose one, the employee number will automatically be inserted in this field. Note: searching by names is slow, so if you know the employee number, it is better to enter it yourself.

Note: If the property is sensitive, you will *not* be allowed to assign it to another employee. The receiving employee *must* be the one to create the EEMR, as the EEMR is his/her acknowledgment of receipt.¹

When you have finished entering the movement changes, tab to *Option*. Select an action:

Send EEMR This action will verify the changes, create an EEMR and save it in the EEMR database. If any change is not valid, you will be notified with an error message at the bottom of the screen. All errors must be corrected before the EEMR will be saved and sent.

Help This action will display some on-line information and direct you to where you may get information in more detail.

Delete EEMR This action will erase any changes you made if you were creating a new EEMR. If you are editing an existing EEMR, this action will delete it. You will always be able to confirm deletes, so that you may not delete EEMRs accidentally. After a delete, you will be returned to the *Create/Edit EEMRs* main menu where you may choose another option or enter a new property number.

Cancel Changes This action will erase any changes you made and return you to the EEMR main menu where you may choose another option or a new property number.

1. Division Administrators and/or their designees may have special authority to create EEMRs for sensitive items. For more information, see the EEMR System - Division Administrator User Guide.

Blank If you enter a blank (and press the RETURN key), you may verify the changes you just made without saving them. This is a good way to check the changes you want to make. For example, the EEMR System will verify a new employee number and display on the screen the new employee name. Error messages are displayed at the bottom of the screen if a change is not acceptable.

If you choose *Send EEMR* and all your changes were accepted, the EEMR System will then check to see if the property is sensitive. If it is, you will see the *sensitive item* screen.

```

Lawrence Berkeley Laboratory - Property Management and Accounting System
      Electronic Equipment Movement Record (EEMR) System

*****
*
* Please be advised that property 6154276 is a *
* sensitive item. This EEMR is your *
* acknowledgment of receipt of this item. *
*
* You are also acknowledging that you have been *
* furnished a copy of the LBL Sensitive Item *
* Policy and understand your responsibilities as *
* summarized therein. *
*
* Do you wish to review this policy (Y/N)?  *
*
*****
    
```

eemr/

Create/Edit EEMRs: sensitive item screen

The EEMR system will display information regarding LBL's policy on sensitive property and will allow you to read the policy on-line if you wish. The on-line policy consists of approximately three screens and should be read periodically.

After you have saved an EEMR, and reviewed the sensitive policy if required, you will see the *comments prompt* screen.

```

Lawrence Berkeley Laboratory - Property Management and Accounting System
Electronic Equipment Movement Record (EEMR) System

*****
*
* Do you wish to add/edit or review comments      *
* to this EEMR (Y/N)?  *
*
*****

EEMR: 6154276 92/04/02 14.54.03

      Bldg. No:      069
      Room No:      0103
      Area:
      User Acct:    3033-50
      User Name:    SUAREZ LM
      Employee No:  257751

```

eemr8

Create/Edit EEMRs: comments prompt screen

The EEMR System allows comments to be added to EEMRs. Comments can be especially useful for reporting errors or sending along information that you feel may be useful. For example, maybe you note that the serial number listed on the screen is incorrect. You may use a comment to relay this information to Property Management. The Division Administrator and Property Management may also add comments to your EEMR. For example, the Division Administrator may disapprove your EEMR and send you a note of explanation. Comments are **not** entered into the PMAS files. If you do not wish to enter comments, simply enter an **n**. You will be notified that processing of your EEMR has completed and you will be returned to the *Create/Edit EEMR* main menu.

If you wish to enter comments and have entered a **y** at the prompt, you will see the *edit comments* screen.

```

Lawrence Berkeley Laboratory - Property Management and Accounting System
Electronic Equipment Movement Record (EEMR) System
New EEMR: 6154276 92/04/02 14.54.03
Enter Creator Comments:
>> There is an error in the serial number. The last 1 should
>> be a 0.
>>
>>
View Division Administrator Comments:
>>
>>
>>
View Property Management Comments:
>>
>>
>>

```

Option: S - Send comments D - Delete comments X - Cancel changes

eemr9

Create/Edit EEMRs: edit comments screen

You may enter up to four lines of information, 60 characters per line. Word processing capabilities are not available; you are basically in strikeover mode. You may not make any changes to Division Administrator or Property Management comments. After entering your comments, tab to *Option* and choose an action:

- Send comments* Comments are saved and “attached” to EEMR.
- Delete comments* Existing comments are deleted. You will be asked to confirm the delete. If there were no existing comments, the system will assume that you do not wish to enter comments.
- Cancel changes* Changes to comments are erased. Existing comments are not changed. If there were no existing comments, the system will assume that you do not wish to enter comments.

After processing comments, you will be notified that processing of your EEMR has completed and you will be returned to the *Create/Edit EEMR* main menu. The system will again perform a quick search for EEMRs and you will now see the EEMR you just created displayed on the main menu. This EEMR is now available for you to edit/delete and for the Division Administrator and Property Management to review.

Edit an existing EEMR

If a property number has existing EEMRs, they will be displayed on the *Create/Edit EEMRs* main menu. You may edit or delete EEMRs with no asterisks next to the EEMR No.:

```

Lawrence Berkeley Laboratory - Property Management and Accounting System
      Electronic Equipment Movement Record (EEMR) System

  Current      EEMR      Create      Approval
Property No.  No. *    Date      Time      DA  PM  Created by  Comments
-----
6154276      1      92/04/02  14.54.03  --  --  SUAREZ LM   Y

-----
Option:
Create a new EEMR:
Edit an existing EEMR:
Edit EEMR comments only:
Get another property number:
Exit the EEMR System:
Enter: 1
      N
      EEMR No.
      EEMR No. followed by C (ie, 1C)
      P
      X
    
```

Create/Edit EEMRs: main menu

eemr10

In this example, current property number 6154276 shows one existing EEMR and you may edit it (no asterisk appears next to the EEMR No.). To edit this EEMR, enter the EEMR No., in this case, 1. The system will perform a lookup on the LBL PMAS files and return information on the current status of the property item. This information, along with the movement changes recorded in the EEMR, will be displayed on the *edit data* screen. At this point, you will follow the same steps you followed in creating this EEMR: making changes, sending EEMR, reviewing sensitive item policy if required, and adding or editing comments. See subsection: *Create a new EEMR*, for more information.

```

Lawrence Berkeley Laboratory - Property Management and Accounting System
      Electronic Equipment Movement Record (EEMR) System

Property No: 6154276          Sensitive:      Yes
Manufacturer: IBM            Acquired Date: 89/09
Description: COMPUTER-PC PS2 80  Purchase Acct: 3025-01
Model:      8580             Prop of Others:
Serial No:  72-7074161

Current Status:              Edit EEMR: 6154276 92/04/02 14.54.03
  Bldg. No:    065                069
  Room No:     0108                0103
  Area:
  User Acct:   3025-01            3033 - 50
  Employee No: 257751 ( SUAREZ LM ) 257751 ( SUAREZ LM )

-----
Option:  d
S - Send EEMR          H - Help          Use TAB to move between fields
D - Delete EEMR       X - Cancel changes  blank - Verify changes
  
```

Create/Edit EEMRs: edit data screen

eemr11

If you want to delete this EEMR, including any attached comments, tab to *Option* and enter a *d*, as shown in the example. The EEMR System will ask you to confirm the delete so that you may cancel if desired.

```

Lawrence Berkeley Laboratory - Property Management and Accounting System
      Electronic Equipment Movement Record (EEMR) System

*****
*
* Are you sure you want to delete this EEMR (Y/N)?  n
*
*****

Delete EEMR: 6154276 92/04/02 14.54.03

  Bldg. No:    069
  Room No:     0103
  Area:
  User Acct:   3033-50
  User Name:   SUAREZ LM
  Employee No: 257751
  
```

Create/Edit EEMRs: delete confirmation screen

eemr12

Edit EEMR comments only

The EEMR System allows you to edit or delete comments attached to an EEMR without having to go through all the steps you followed in creating an EEMR.

```

Lawrence Berkeley Laboratory - Property Management and Accounting System
      Electronic Equipment Movement Record (EEMR) System

Current      EEMR      Create      Approval
Property No. No. *   Date       Time       DA  PM   Created by   Comments
-----
6154276      1          92/04/02  14.54.03          SUAREZ LM      Y

-----
Option:                                Enter: 1c
  Create a new EEMR:                    N
  Edit an existing EEMR:                 EEMR No.
  Edit EEMR comments only:              EEMR No. followed by C (ie, 1C)
  Get another property number:          P
  Exit the EEMR System:                 X
    
```

eemr13

Create/Edit EEMRs: main menu

At the Create/Edit EEMRs main menu, enter the EEMR No. and a **c**, in this case, **1c**. This will tell the EEMR System to go directly to the *edit comments* screen for further processing. At this point, you may make changes, send comments, delete comments or cancel. For more information regarding comments, see subsection: *Create a new EEMR*.

```

Lawrence Berkeley Laboratory - Property Management and Accounting System
      Electronic Equipment Movement Record (EEMR) System
      New EEMR: 6154276 92/04/02 14.54.03
Enter Creator Comments:
>> THERE IS AN ERROR IN THE SERIAL NUMBER. THE LAST 1 SHOULD
>> BE A 0.
>>
>>
View Division Administrator Comments:
>>
>>
>>
View Property Management Comments:
>>
>>
>>

Option: 3 S - Send comments   D - Delete comments   X - Cancel changes
    
```

eemr14

Create/Edit EEMRs: edit comments screen

If you want to delete the comments, tab to *Option* and enter a **d**, as shown in the example. The

EEMR System will ask you to confirm the delete so that you may back out if desired. Only the comments will be deleted, the EEMR will remain intact and unchanged.

```
Lawrence Berkeley Laboratory - Property Management and Accounting System
      Electronic Equipment Movement Record (EEMR) System
      Edit EEMR: 6154276 92/04/02 14.54.03
Creator Comments:
>> THERE IS AN ERROR IN THE SERIAL NUMBER.  THE LAST 1 SHOULD
>> BE A 0.
>>
>>
*****
*
* Are you sure you want to delete comments (Y/N)? 
*
*****
```

eemr15

Create/Edit EEMRs: delete comments confirmation screen

Reports

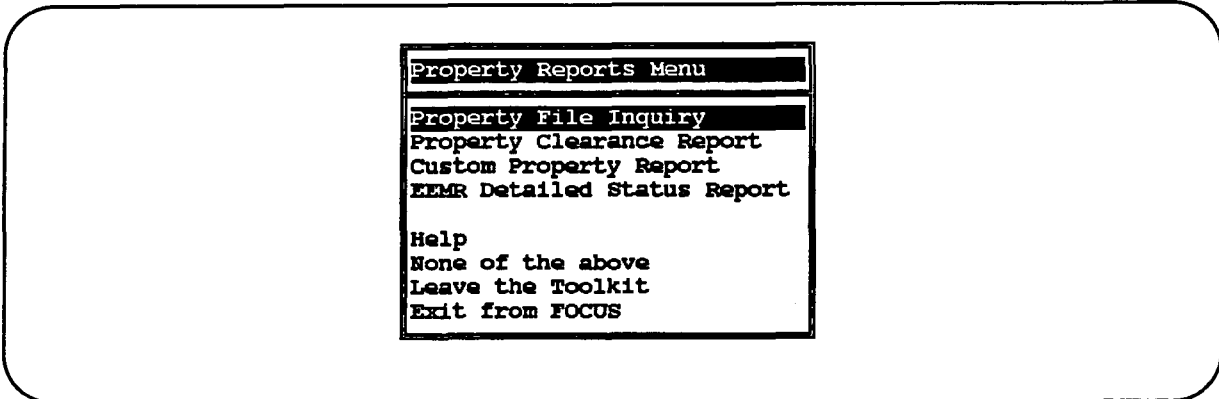
When you choose Toolkit option: *Property Management*, you will see the Property Management System menu window on the screen.

```
Property Management System
Create/Edit EEMRs
Reports
Help
None of the above
Leave Toolkit
Exit from FOCUS
```

eemr18

Toolkit window: Property Management menu window

If you wish to select a report from a list of standard reports, choose option: *Reports*. You will now see another menu window which will list the standard reports available.



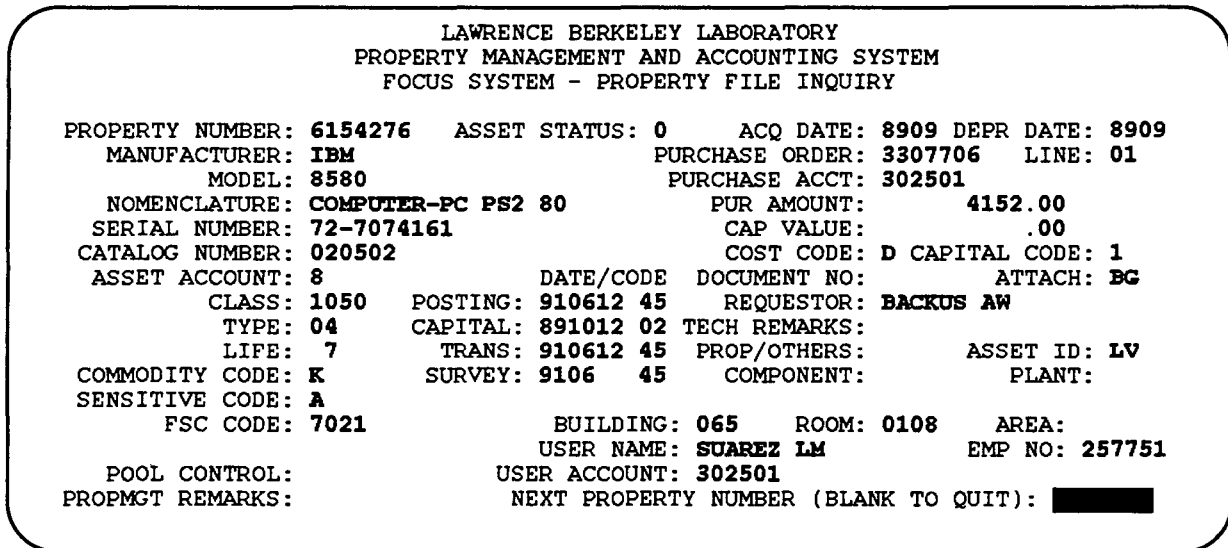
Reports: main menu window

eemr19

The *Property File Inquiry* and *Property Clearance Report* have been available via the Toolkit for some time now. Each report will be described in the following subsections. The remaining subsections cover features that are common to all reports: how to look at a FOCUS report on the screen and how to produce hardcopy of a FOCUS report.

Property File Inquiry

This report will display all current information in the PMAS files for a piece of property. Enter the property number when prompted and the screen will display the information. At the bottom right corner of the screen you are given the option of entering another property number or quitting. A sample of this report is shown.



Reports: Property File Inquiry

eemr20

Property Clearance Report

The Property Clearance Report can be a useful report for keeping track of property assigned to you. This is the same report that Property Accounting runs when clearing employees for termination. When you select this report, you will see a prompt screen asking you to enter some selection criteria.

```
Property Management and Accounting System      TKPM5320
Property Clearance Report Request

Enter employee numbers or character strings:

EMP. 1: 234851      EMP. 2:
EMP. 3:             EMP. 4:
EMP. 5:             EMP. 6:
EMP. 7:             EMP. 8:
EMP. 9:             EMP.10:

If you are entering a character string, employee names will be
searched for a match.  If more than one match occurs, the names
will be displayed for your selection.

Use TAB key to move around the screen.  Hit RETURN when done.
Leave blank to quit.

A choice of output devices will be displayed after the report run.
```

eemr21

Reports: Property Clearance Report prompt screen

You may enter up to 10 employee numbers or character strings. Character strings may consist of a last name or part of a last name. If you enter a character string, the report processor will search the personnel files for a match. If there is more than one match, a list will be displayed from which you may choose the desired name. If there is only one match or you entered an employee number, the processor will immediately run the report. This report is over 80 columns wide so it will take more than one screen to show it all. A sample of part of this report is shown.

Property assigned to: SUAREZ, LM (257751) University of California 05/29/92
 Number of items: 3 Lawrence Berkeley Laboratory TKPH5320

Property Number	Description	Manufacturer	Serial No	Bldg	ROOM	User Account	User Name	Emp No	S I	CAP ID
6033762	PRINTER	IBM	0012695	065	0108	302501	SUAREZ LM	257751		A
6154276	COMPUTER-PC PS2 80	IBM	72-7074161	065	0108	302501	SUAREZ LM	257751		A
6168549	WORKSTATION	SUN MICROSYS	036G5107	065	0108	302501	SUAREZ LM	257751		A

* * * END OF REPORT * * *

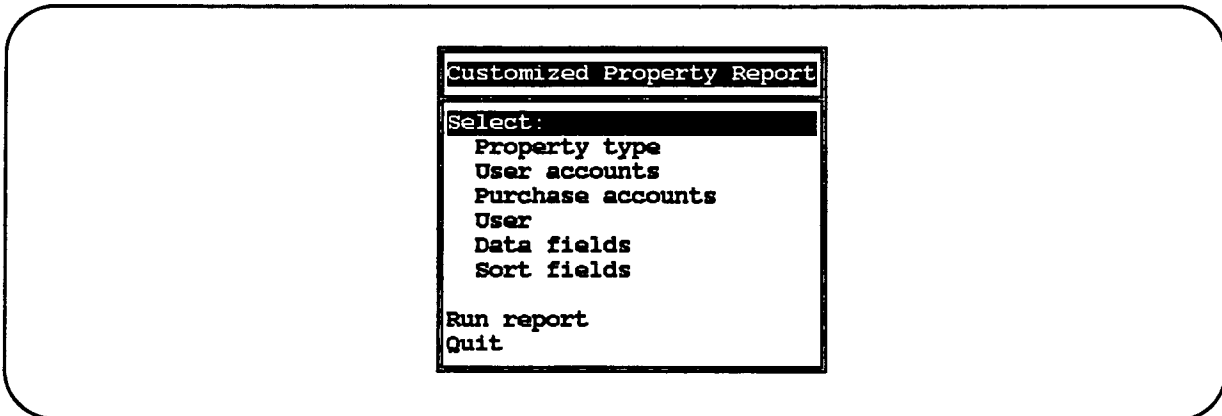
NUMBER OF EMPLOYEES REPORTED: 1 TOTAL NUMBER OF ITEMS: 3
 EMPLOYEE NUMBERS REPORTED: 257751

eemr22

Reports: Property Clearance Report

Custom Property Report

The Custom Property Report was developed so users may design their own property reports. This report generator will report only from the property files. Windows are used exclusively to build your report. This will be useful for users who are not familiar with FOCUS but want to create ad hoc reports.

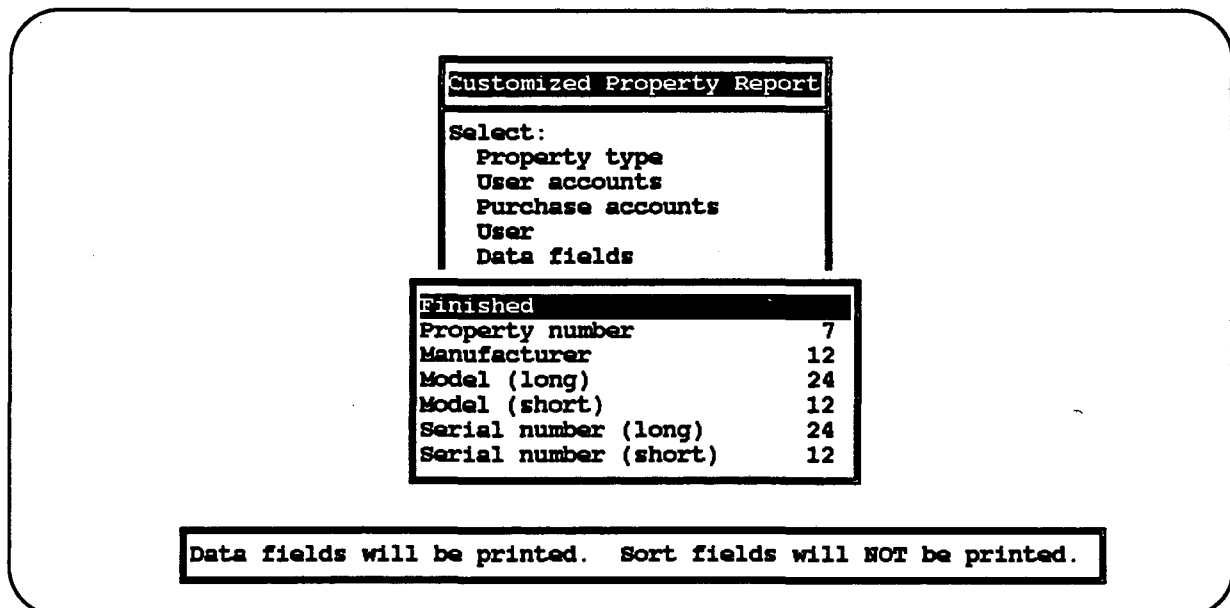


eemr41

Reports: Custom Property Report

You design your report by moving the highlight bar to options and pressing the RETURN key. Most options allow you to enter multiple items, such as selecting more than one account number range. Simply follow the instructions in the windows, you may select *Finished* to indicate you are done.

- Property type** You may limit your search to specific types of property. Currently, you may choose to search only computer equipment or all property. Additional property types will be added on demand. Default type is all property.
- User accounts** You may search for property items with specific user account number ranges. You may enter more than one range. Default is no range.
- Purchase accounts** You may search for property items with specific purchase account number ranges. You may enter more than one range. Default is no range.
- User** You may search for property items assigned to specific users. You may request a search by last name or by employee number. You may enter any combination and as many as you want. Default is no user select.
- Data fields** With this option, you may select the data items you wish to see in your report. Move the highlight bar to a data item and press the RETURN key. Keep doing this until you have selected each item you wish in your report. If you do not choose this option, a default set of data items will be used. This default set includes property number, description, operating account, user, employee number, building, room, area, and sensitivity.
- Sort fields** This option is similar to the *data fields* option. Simply move the highlight bar to a data item to choose it as a sort field. The report will be sorted in the order in which you selected the sort fields. The default sort is the file sort, by property number.



Reports: Custom Property Report - select data fields

eemr47

You may, at any time before you run a report, go back to an option and change your request. However, you must reselect everything in that option that you want in the report. For example, if you decide you want another field printed and you return to the *data fields* option, you must select all your fields over again.

When you are finished designing your report, move the highlight bar to *Run report* and press the RETURN key. Your report will be displayed on the screen. After the report is run, all report settings are returned to defaults.

Note: If you do not limit your search by selecting a property type, entering user accounts, entering purchase accounts or entering a user, all property items will be searched and you will receive a very large report. It is recommended that you always limit your search.

EEMR Detailed Status Report

The Detailed Status Report will list all information for all EEMRs for a creator only. If you have three EEMRs existing (whether they are for three different property numbers or all for the same property number), this report will list them along with comments and any actions taken by the Division Administrator or Property Management. The report will only include EEMRs you created using the userid you are logged onto at the time you request the report. You will **not** be able to use this report to view EEMRs created by other employees. This report may be short or long, depending on how many EEMRs you have and how many comments each EEMR has. You will have the option of listing all of your EEMRs or all of your EEMRs for a property number. A sample of this report is shown.

```
PAGE      1

                                EEMR Detailed Status                                Date: 07/02/92

Property No: 6154276
  Created: 92/04/02 14.54.03
  Updated: Updated      92/04/02

Employee No: 257751 (SUAREZ LM )
Account: 303350   Building: 069   Room: 0103   Area:

Division Administrator: Pending
Property Management: Pending

Comments:

Creator -
  THERE IS AN ERROR IN THE SERIAL NUMBER.  THE LAST 1 SHOULD
  BE A 0.
```

eemr23

Reports: EEMR Detailed Status Report

Viewing Reports On-line

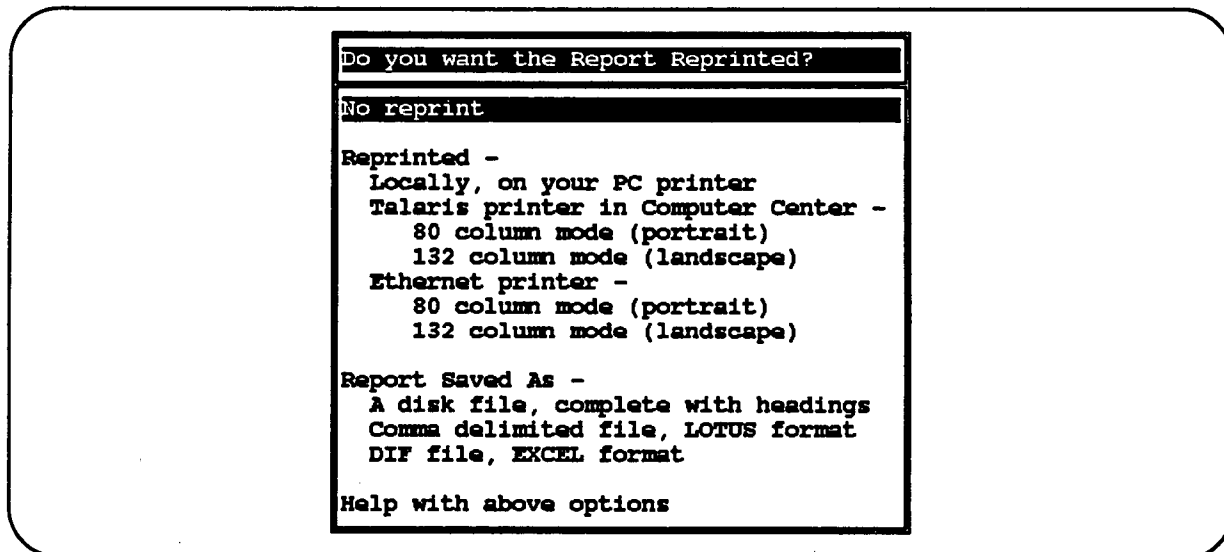
The previous subsections described each report and how to generate it. This subsection covers how to view a report once it is generated. While FOCUS is generating the requested report, various messages will appear on the screen. When it is finished, you will usually see messages indicating how many records are in the report, how many lines are in the report, and the width in characters of the report. FOCUS now pauses and asks you to press the RETURN key when you are ready for the report. After pressing RETURN, you will see the first page of the report.

You may step through the report page-by-page by pressing the RETURN key. At any time, you may enter q or e to quit or exit from the report. Also, when the message 'END-OF-REPORT' appears at the bottom of the screen, you may press the RETURN key once more to exit the report. In addition, FOCUS provides full-screen scrolling capabilities for viewing reports. For more information on using this feature, see section: Appendix D - FOCUS Hot Screen Capabilities.

Upon exiting the report, a screen appears asking about hardcopy output. Please refer to the following subsection for more information about this screen. After selecting an option, you will be returned to the menu window where the report was invoked.

Hardcopy Output

After you have finished viewing a report displayed on the screen, you will see a Toolkit menu window listing hardcopy options. This menu is essentially self-explanatory. If you do not want any hardcopy output, you may simply press the RETURN key, as the cursor will be positioned on the first option, *No reprint*.



Toolkit window: hardcopy options

eemr24

If you want to save the report, there are four options: 1) locally on an IBM-PC printer, 2) at the Computer Center printer (Bldg. 50B, Room 1215), 3) on a printer on the LBL network, or 4) in a disk file.

Local Print

The ability to get a local hardcopy is possible only if you have logged onto the VAX through an IBM-PC and if you have a printer available locally. Depending on the size of the report, you may have to put the printer in compressed mode. Local print is currently not available if you have logged on via a Macintosh.

Computer Center or Network Print

The report can also be sent to one of the Talaris printers at the Computer Center, or to one of the printers on the laboratory-wide network, whichever is more convenient for you. In either case, you have the option of printing the report lengthwise on the page (portrait mode) with a maximum of 80 columns per page, or across the page (landscape mode) with a maximum of 132 columns per page. If a report is wider than the indicated maximum, the report will be printed in panels; i.e., in landscape mode, the first panel contains the leftmost 132 columns, the second panel, the next 132 columns, etc. For ease of readability, wide reports should be printed in landscape mode.

If one of these print options is chosen, you will be asked to supply a name for the report. A typical name may be *eemr.out* or *eemr.lis*.

Any reports that you may have sent to the printer will still be in your directory after the FOCUS session. They will have the name(s) that you assigned. If the reports have printed successfully, you should delete the files from your directory.

If the option to use one of the printers on the laboratory network is selected, FOCUS will look in your profile to see if you have named a printer. If one has been specified, you will have the option of using that one or selecting another one. If none has been specified, you will be asked to supply the name of one. For more information on the names of printers available on the laboratory network, type **help laserprint** at the `Csa1>` prompt.

Save to a File

If you choose to save the report in a file, you will be asked to supply a name for the file. It will be saved with that name and in the VAX directory in which FOCUS was invoked. You may save the report in several different formats. If you save it as a disk file, the report will be written to the file as it appears on the screen, complete with headings. If you save it in LOTUS or EXCEL format, you will not get headings. Use these formats if you want to download the file to your PC or Macintosh

for use in LOTUS or EXCEL. The file will no be downloaded automatically, you must leave FOCUS and perform that function yourself.

When you have finished selecting a printout destination, you will be returned to the *Reports* main menu.

EEMR Review and Approval Process

Before EEMRs are incorporated into the PMAS files, they must go through an approval process. Approval occurs in two steps: Division Administrator approval and Property Management approval. These are described in the following sections.

Division Administrator

Every EEMR that is created must be approved by a Division Administrator. If you create an EEMR, the Division Administrator must approve it. If your EEMR is not approved, it will not be passed along for Property Management approval. The Division Administrator has authorization to review and take action on only those EEMRs created in his/her division. Division is determined by the user account listed in an EEMR. The actions the Division Administrator may take are as follows:

- Review* The Division Administrator originally views a short description of your EEMR. If a more detailed review is desired, it may be selected. This includes reviewing comments.
- Approve* The Division Administrator may approve your EEMR. Your EEMR is then updated with status information on who approved it and when it was approved. The Division Administrator may also add comments to your EEMR. Detailed Status Reports obtained after an EEMR was approved will show the updated status information. Once your EEMR is approved, you will not be able to make changes to it.
- Disapprove* The Division Administrator may disapprove your EEMR. Your EEMR is then updated with status information on who disapproved it and when it was disapproved. The Division Administrator may also add comments to your EEMR. If you obtain an EEMR Detailed Status Report after an EEMR was disapproved, the updated status information will appear in the report. The Division Administrator will make use of the comments feature to notify you as to why the EEMR was disapproved. Further processing of this EEMR will not occur until you make the necessary changes.
- Hold* The Division Administrator may hold your EEMR. This will prevent you from making any changes to it while the Division Administrator decides whether to approve or disapprove it. Further processing of this EEMR will not occur until the

EEMR is approved or disapproved.

Division Administrators are given the option of changing their minds about an action they take on an EEMR, *as long as* Property Management has *not* taken any action against the same EEMR already.

Property Management

After an EEMR is approved by a Division Administrator, Property Management must approve it. If your EEMR is not approved, your movement changes will not be entered into the PMAS files. Property Management has authorization to review and take action on only those EEMRs that have received Division Administrator approval. The actions Property Management may take are as follows:

- Review* Property Management originally views a short description of your EEMR. If a more detailed review is desired, it may be selected. This includes reviewing comments.
- Approve* Property Management may approve your EEMR. Your EEMR is then updated with status information on who approved it and when it was approved. Property Management may also add comments to your EEMR. If you obtain an EEMR Detailed Status Report after an EEMR was approved, the updated status information will appear in the report. Once your EEMR is approved, you will not be able to make changes to it.
- Disapprove* Property Management may disapprove your EEMR. Your EEMR is then updated with status information on who disapproved it and when it was disapproved. Property Management may also add comments to your EEMR. If you obtain an EEMR Detailed Status Report after an EEMR was disapproved, the updated status information will appear in the report. Property Management will make use of the comments feature to notify you as to why the EEMR was disapproved. Further processing of this EEMR will not occur until you make the necessary changes.
- Hold* Property Management may hold your EEMR. This will prevent you and the Division Administrator from making any changes to it while Property Management decides whether to approve or disapprove it. Further processing of this EEMR will not occur until the EEMR is approved or disapproved.

Update of PMAS Files

After an EEMR has received approval by the Division Administrator and Property Management, it is ready to be incorporated into the PMAS files which reside on the IBM mainframe.

Once a day, the EEMR system will search for approved EEMRs. Fully approved EEMRs are extracted and transferred to the IBM mainframe where a daily batch job will enter the movement changes into the PMAS files. The only information extracted for each EEMR is the movement change information. Comments are not transferred to the IBM mainframe. After the update, a copy of the PMAS files are transferred to the VAX so up-to-date property information is available.

Once an EEMR is extracted, it is no longer available for review or reporting by the creator, Division Administrator or Property Management. The EEMR is physically removed from the database and placed in an archive history file. This history file contains the entire EEMR, including comments, and when it was archived. Only Property Management has access to the archive file.

Appendix A - Getting Started

Both the Toolkit and the EEMR System were written in FOCUS on the VAX computer. To access these, you must have an account on the Computer Center VAX Cluster. If you do not currently have an account, you may obtain one from Pat Bean in the Information and Computing Sciences Division (ext. 7008). You will be assigned a username and password. Also, you must be using a VT-100 compatible terminal, or a personal computer (PC) that emulates a VT-100, for the FOCUS screens to work properly.

The Computer Center VAX Cluster contains several VAXes; however, FOCUS is licensed only on CSA1. FOCUS will not run on any other VAX. Furthermore, you must be logged on directly to CSA1; FOCUS will not run if you use "set host" to get to CSA1.

Once you have an account on the VAX Cluster, you must log on. This can be done in several ways - by logging on directly, by using telnet, or through a PC (IBM-PC or Macintosh). If you are using a PC as a terminal, please read the next section. If you are using a terminal and log onto the VAX directly, please skip the next section and go to Section A-1.1: Logging onto the VAX.

Using a PC as a Terminal

To log onto the VAX Cluster from a PC, it is necessary to connect the PC to the VAX. This is done by running a program on the PC that allows the PC to emulate a terminal, and in particular, a VT-100 terminal. Several programs such as Kermit (version 2.3 or later), PC-VT or PCPLUS perform this function on IBMs. Versaterm and telnet provide terminal emulation on Macintoshes. Kermit, Versaterm, and telnet are supported by the Work Station Group (ext. 6858) and can be obtained from them in Building 50B-2239. For more help or assistance in using such a program, please ask at the Help Desk at the Computer Center, Building 50B, Room 1215.

Logging onto the VAX

With most terminals at the laboratory, the telephone system is used to specify the particular computer you want to access. No matter which terminal emulation package is used, the process of connecting to the CSA1 computer is the same. The connection process is initiated by getting the attention of the routing switch. With Kermit, this is done by entering `c` (or connect) at the Kermit prompt. If this does not work, try `<ctrl>]l` (hold down the CONTROL key and the right square bracket key together, followed by the letter L). With Versaterm, press the SHIFT key followed by

the RETURN key. With both Kermit and Versaterm, the following line stating the available options will appear at the top of the screen.

ENTER - DIRECTORY(D), NETWORK(N), OUTSIDE(O), OR TERMINAL TYPE CHANGE(T) >

Enter a **d**. Then a line will appear asking for the destination number (which computer is desired), enter **csa1**. After the line **DATA CALL INITIATED** appears, press the RETURN key twice. The computer will respond with its banner line and then ask for your username. Once you have entered your username, on the next line, the computer will ask for your password. Enter your password. Your password will *not* appear on the screen as you type it.

```
ENTER - DIRECTORY(D), NETWORK(N), OUTSIDE(O), OR TERMINAL TYPE CHANGE(T) > d <return>
ENTER DESTINATION NUMBER > csa1 <return>
DATA CALL INITIATED <return> <return>

Csa1 VMSV5.5-TG CSA1 6510 Computer
Username: (username) <return>
Password: (password, not echoed) <return>
```

Telnet should be used by those people with Macintoshes on the Ethernet as it is not necessary to go through the phone system. After opening Telnet, select *Open Connection* from the File menu. Enter **csa1** as the Session Name and then log in.

Starting FOCUS

Once the logon process has been completed, you are now on the VAX and ready to start. As was mentioned earlier, you must be using a VT-100 for the FOCUS screens to work properly. This can be done by entering at the VAX prompt (**CSA1>**), the command **set term/vt100**. FOCUS can be started by just entering **focus** at the prompt. The computer will respond with the FOCUS banner line and then the FOCUS prompt, **>>**. At this point, you may enter any FOCUS command, or you can start up the Toolkit by entering **ex tkit**.

```
Csa1>set term/vt100 <return>
Csa1>focus <return>

FOCUS 6.1 VX6.1.0 CREATED 02/05/91
(C)Copyright 1990 Information Builders Inc.

>> ex tkit <return>
```

It is not necessary to enter `set term/vt100` each time that you log on. If it is included in your `login.com` file, it will be automatically executed each time that you log on. To check whether or not your `login.com` file includes such a line, enter `type login.com` at the VAX prompt. If the `login.com` file does not include this line, you should include it using any editor with which you are familiar.

Using the Toolkit

For most screens, on-line help is available in the Toolkit. By using the on-line documentation, you should be able to determine for yourself what is available in the Toolkit and how to access it. This section will not attempt to cover every feature of the Toolkit, but will give an overview of how the Toolkit is structured.

The Toolkit is started by entering `ex tkit` at the FOCUS prompt (`>>`). This performs some initialization to enable FOCUS to locate the main laboratory-wide administrative data files. After a few seconds, the Toolkit main menu will appear.

```

Welcome to Data Processing Service's Toolkit
*****
Please select an Option -
Options:
Account Master
Effort/Contract Labor
Job Order
Ledger (Detail or General)
People/Personnel/Training
Property Management
Purchase Order
Sponsored Research
Stores
Travel
Warehouse (WASP)

Utilities in the Toolkit
Help with the Toolkit
Leave Toolkit
Exit from Focus
```

cemr17

Toolkit main menu

At this point, you may choose to access one of the eleven options, run one of the available utilities, look at the on-line help, leave the Toolkit and return to the FOCUS prompt, or exit from FOCUS entirely and return to the VAX prompt. When this menu appears, the *Options* line will be highlighted. This is not a valid option, but serves as a subheading for the following categories.

You may indicate your choice by moving the highlight bar to the item of interest and then pressing the RETURN key. The highlight bar is moved by using the up and down arrow keys, or by typing the first letter of the desired option. Entering e, for example, will move the highlight bar to the option *Effort/Contract Labor*. Entering e again will move the highlight bar to **Exit from Focus**.

All of the menus in the Toolkit have the same structure as this opening menu. The upper portion lists the available options while the lower portion offers help and navigational capabilities. The help is context sensitive and will explain the options available in the current menu. For more information on usage of the Toolkit, see the *Toolkit User's Guide* which is available from Data Processing Services.

Logging off the VAX

When you have exited from FOCUS and returned to the VAX prompt, you may log off the VAX computer by entering **lo** or **logout**. You will then be returned to your PC and may exit your terminal emulator application as appropriate. With Kermit, this is done by **<ctrl>]c** (hold down the CONTROL key and the right square bracket key together, followed by the letter c). Then enter **exit** to quit Kermit.

Appendix B - Location Formats and Codes

Property location is made up of a building number, a room number and an area. Descriptions of each follow, along with defined formats and/or standard codes. Help is also available online for each of these fields. Simply enter an **H** (blank out the rest of the field) in the field which you are interested in and press the RETURN key.

Create/Edit EEMRs HELP - Room Number

Page 1 of 2

Room number is a required field. Room numbers are validated against the current building and room file maintained by Plant Engineering and also an additional building and room file maintained by Property Management. A room number is identified by a five character code. You are not required to enter leading zeros, the EEMR System will do this for you. Example: you enter 108, the EEMR System formats it as 0108.

To see a list of all valid room numbers, enter an L in the room number field and press the RETURN (or ENTER) key. A list will be displayed from which you may select the correct room number.

If a standard room number does not meet your needs (perhaps your equipment is outside the building), you may enter a valid standard area code in the room number field. To use one of these area codes, leave the room number field blank, enter an L in the area field and press the RETURN (or ENTER) key. A list will be displayed from which you may

Press ENTER to continue ...

eemr39

Create/edit EEMRs: Room number help screen

Building Number

All locations must include a building number. The building number entered must match a building number in Plant Engineering's Building and Room file or Property Management's supplemental Building and Room file. To see a list of all valid building numbers, enter an **L** in the building number field and press the RETURN key. A list will be displayed from which you may select the correct one.

A building is identified by a four character code. You are not required to enter leading zeros, the EEMR System will do this for you. Shown are some examples of building numbers as entered and as formatted and stored by the EEMR System:

<u>You enter:</u>	<u>Formatted:</u>
1	001
70	070
50A	050A
901	901
B5B	B05B

If the building number you wish to enter does not match a building number in either Plant Engineering's Building and Room file or Property Management's supplemental Building and Room file, contact Property Management for further assistance.

Room Number

All locations must include a room number. The room number entered must match a room number in Plant Engineering's Building and Room file or Property Management's supplemental Building and Room file or Standard Area Code file. To see a list of all valid room numbers for a building, enter an L in the room number field and press the RETURN key. A list will be displayed from which you may select the correct one.

A room is identified by a five character code. You are not required to enter leading zeros, the EEMR System will do this for you. Shown are some examples of room numbers as entered and as formatted and stored by the EEMR System.

<u>You enter:</u>	<u>Formatted:</u>
2	0002
22A	0022A
222	0222
2222	2222

If there is no room number (maybe the property item is outside the building), use one of the standard area codes described in the following section. If you know the code, you may simply enter it in the room number field. If you are unsure of the code, leave the room number field blank, enter an L in the area field and press the RETURN key. A list will be displayed from which you may select the correct code. If you left the room number field blank, the EEMR System will automatically enter the area code you selected in the room number field. If none of these codes meets your needs, contact Property Management for further assistance.

Area

Area is not a required field. It may be left blank or may be used to further identify the location of property. For example, if the property item is located in the hallway, you should enter the room number nearest the property item as the room number and enter HALL in the area field.

Area is identified by a six character code. No special format is required; however, try to use codes with obvious meanings. Property Management has a list of standard area codes. Use these wherever you can. To see this list, enter an L in the area field and press the RETURN key. A list will be displayed from which you may select the correct code. Shown are some examples of area codes.

CONTR	- Control Room
OSW	- Outside West
BSMT	- Basement
A1	- Area 1

If no standard area code meets your needs and you are not sure of what to enter as a code in the area field, contact Property Management for further assistance.

Using Location Lists

For all three parts of a location, building, room and area, you may elect to display a list of valid entries from which to choose. If the list is too large for one screen, pressing the RETURN key will scroll you forward one page at a time. To choose an entry, enter an S in front of it and press the RETURN key. If you do not want to select any entries, simply enter an X anywhere and you will be returned to the data entry screen.

```

Lawrence Berkeley Laboratory - Property Management and Accounting System
      Electronic Equipment Movement Record (EEMR) System

Property No: 6154276          Sensitive:      Yes
Manufacturer: IBM           Acquired Date: 89/09
Description:  COMPUTER-PC PS2 80   Purchase Acct: 3025-01
Model:      8580              Prop of Others:
Serial No:  72-7074161

Current Status:              Edit EEMR: 6154276 92/04/02 14.54.03
  Bldg. No:    065                069
  Room No:    0108                L
  Area:
  User Acct:  3025-01            3033 - 50
  Employee No: 257751 ( SUAREZ LM ) 257751 ( SUAREZ LM )

-----
Option:  █                      Use TAB to move between fields
  S - Send EEMR          H - Help
  D - Delete EEMR       X - Cancel changes      blank - Verify changes
    
```

eemr29

Create/edit EEMRs: request list of valid room numbers

Lawrence Berkeley Laboratory - Property Management and Accounting System
Electronic Equipment Movement Record (EEMR) System

List of valid room numbers for Bldg 069 :

0100	S	0103	0104E	0110
0100A		0103A	0104F	0195
0100B		0103B	0104G	0196
0100C		0103C	0104H	0197
0100F		0103D	0104I	0198
0101		0104	0104J	0199
0101A		0104A	0104K	0200A
0101B		0104B	0105	0200B
0102		0104C	0107	0201
0102A		0104D	0109	0201A

To select, enter an S in front of desired room and press RETURN.

To scroll forward through the list, press RETURN.

To exit without selecting a room, enter an X anywhere, press RETURN.

cemr30

Create/edit EEMRs: List of valid room numbers

Appendix C - On-line Help Facility

For most Toolkit menus, on-line help is available. The on-line documentation will describe what is available in the Toolkit and how to access it. On-line help documentation will usually not contain detailed help. For more detailed information about the Toolkit, refer to the *Toolkit User's Guide*.

On-line help documentation for the EEMR System gives a general description of the available options for a particular menu. For more detailed information, refer to this user's guide. A typical on-line help screen is shown.

Property Management and Accounting System - Reports	HELPPMRC
The Property Inquiry Report will give you the status of a piece of equipment; i.e., the description, manufacturer, purchase price, location, custodian, etc.	
The Property Clearance Report will list all the property for which a particular employee is responsible, and a limited amount of additional information, such as description, manufacturer and location.	
The EEMR Detailed Status Report will list all EEMRs created by you and their statuses.	
If you have any questions or suggestions regarding use of these reports, please call Property Management (ext. 5151).	
Press ENTER to return to Toolkit menu.	

Reports menu window: on-line help

eemr25

More detailed help information is available for the EEMR data entry fields. See section: Creator Activities for more information.

Appendix D - FOCUS Hot Screen Capabilities

The FOCUS report output feature, or Hot Screen, provides full-screen scrolling capabilities for reviewing the report contents. The entire report remains accessible until the RETURN key is pressed after the 'END-OF-REPORT' message appears in the control area at the bottom of the screen. If the report is too wide to fit on the screen (more than 80 columns), you will see the left side of each page and then the right side. By successively pressing the RETURN key, you will step down through the report. The following table summarizes other commands that can be entered while the report is on the screen. These should be entered on the command line at the bottom of the screen (your cursor will most likely be positioned on the command line).

<u>Command</u>	<u>Description</u>
top	Scrolls to the first page
bottom	Scrolls to the last page
next n	Scrolls forward 'n' pages
forw n	Same as next n
down n	Same as next n
up n	Scrolls up or backwards 'n' pages
back n	Same as up n
left n	Moves screen display 'n' characters to the left
right n	Moves screen display 'n' characters to the right
locate/string	Locates the character string 'string'
quit	Leave the report
exit	Leave the report

Hot Screen commands

The shortest unique truncation can be used for any of the above commands. Also, by repeating the first letter of the command, the command can be issued repeatedly by just pressing the RETURN key. For example, **uu 1** will scroll up one page each time the RETURN key is pressed. A sample of entering a Hot Screen command to go up one page is shown. Note that the command appears in the lower left corner of the screen.

PAGE 2

EEMR Detailed Status

Date: 03/06/92

Property No: 6154276
Created: 92/03/06 13.00.46

Employee No: 257751 (SUAREZ LM)
Account: 303350 Building: 069 Room: 0103 Area:

Division Administrator: Pending
Property Management: Pending
IBM PMAS: Updated 92/03/06

Comments:

Creator -

THERE IS AN ERROR IN THE SERIAL NUMBER. THERE SHOULD BE A
DASH BETWEEN THE 1 AND 0.

u1

END OF REPORT

Hot Screen: go up one page

eemr26

The above commands work best when you are using a VT100 terminal, or a VT200. On IBM-PCs and Macintoshes with VT-100 emulators, they do not always work as well. In particular, although the *locate* command seems to work as advertised, the repeat version of *locate/string* does not appear to work on an IBM-PC using Kermit as an emulator. Similarly, *left n* and *right n* appear to move from one panel to the other rather than just *n* characters.

Appendix E - Concurrency Controls

The EEMR database is a centralized file. As this database may be simultaneously accessed by many users, the most current information is always available. Concurrency controls have been implemented to prevent users from making changes to the same record without notification. The EEMR System has been designed in a way which makes concurrency conflicts rare.

Users may create EEMRs, but may only edit or delete EEMRs they themselves created. This prevents a user from making changes to another user's EEMR. Also, once an EEMR has been approved, even the creator cannot make changes to it. The only time when two users may try to change the same EEMR is when the creator is editing the EEMR and the Division Administrator is editing the EEMR (approving or disapproving) at the same time.

It is possible for a creator and a Division Administrator to access the same EEMR at the same time. For example, the Division Administrator may have reviewed an EEMR and is approving it. At the same time, the creator has decided to delete the EEMR. If the creator's change is processed first, seconds before the Division Administrator's, the EEMR is deleted. When the Division Administrator's action is processed, the EEMR is not found and an error occurs. Controls have been put into place to catch such instances, rare though they may be. In this example, the Division Administrator would have been notified (as soon as an update was attempted) of a change to the EEMR and not allowed to continue. This gives the Division Administrator a chance to review the change that has occurred to see if the action that was being taken is still appropriate.

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Warning: EEMR 6154276 91/11/19 11.17.50 has been changed!

A change to this EEMR has just been detected in the central EEMR database. Because these changes may affect the changes you had planned to make, you will not be allowed to edit this EEMR at this time. After you press the RETURN key, this procedure will regenerate the list of EEMRs and display them for your selection. At that time, you will be able to review the changed EEMR. Possible changes include:

- Division Administrator approval/disapproval
- Someone else (using your userid) updated or deleted the EEMR

Press RETURN to continue ...

Create/Edit EEMRs: change notification screen

eemr16

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