Electronic Equipment Movement Record System

Division Administrator Guide

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Preface

This manual explains how Division Administrators\(^1\) may 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.

The Division Administrator’s Guide is designed as a supplement to the \textit{EEMR System User’s Guide} which explains how LBL employees may use the EEMR System. This guide explains how Division Administrators may review and approve EEMRs. General information on the EEMR System may be found in the \textit{EEMR System User’s Guide}. Division Administrators should have both guides which are available from Property Management.

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

\(^{1}\) In this document, Division Administrator connotes Division Administrator and his/her designee.
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Division Administrator

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. Division Administrators are allowed to Create/Edit EEMRs, Approve EEMRs, and obtain Reports.

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. These new users are given creator authority only.

Authorization

Division Administrators and their designees will have authority to approve all EEMRs for their respective divisions only. Approval authority may be further restricted by account numbers. For example, a Division Administrator may wish to allow a designee to approve only those EEMRs for property with user accounts within a specified range.

Also, Division Administrators may request authorization to create EEMRs for sensitive property items within their respective divisions. Without this authorization, EEMRs may be created only by the employee receiving the sensitive property.
Only Property Management may implement any special authorizations required by a division. For more information, see the following section.

**Registration**

Users who require approval authority, such as Division Administrators, must contact Property Management. Property Management will then enter the user’s new authorization in the EEMR Registration/Authorization database. Division Administrators are not required to self register before contacting Property Management.

When you contact Property Management, be prepared to provide your employee number and your VAX userid. Property Management will also want to know if the authorization is for a Division Administrator or a designee. If you currently have approval authority and no longer have a need for it, please notify Property Management immediately.

For information on options Create/Edit EEMRs, Approve EEMRs and Reports, see section: Division Administrator Activities.
Division Administrator Activities

Create/Edit EEMRs

See section: Creator Activities in the EEMR System User's Guide for detailed information on using this function.

Approve EEMRs

A general overview of the EEMR approval process may be found in the EEMR System User's Guide, section: EEMR Review and Approval Process.

When you select Property Management option: Approve EEMRs, the EEMR System passes through the database looking at the user account listed in each EEMR to determine which division it belongs to. A Division Administrator may review and approve only those EEMRs belonging to his/her division.¹ Also, any division EEMRs that have already been reviewed but have not yet been reviewed by Property Management will be selected. When this search is complete and EEMRs have been found, you will see the approval screen. If no EEMRs are found, you will see a message on the screen stating that no EEMRs require your approval at this time.

¹. The approver may be further restricted to EEMRs for property within a specified account number range. The Division Administrator must request this restriction from Property Management.
At the top of the approval screen, you will see your name and division. Below this you will see the Next? prompt. Up to 10 EEMRs will be displayed on the approval screen at a time. If more than 10 EEMRs require your review and approval, you may scroll forward and backward through the list of EEMRs. Enter F to scroll forward (displays the next 10 EEMRs), enter B to scroll backward (display previous 10 EEMRs). You may enter X to leave Approve EEMRs and return the Property Management menu window. For each EEMR you will see the following information:

**Act**
This is where you enter whatever action you wish to take on an EEMR. More information about the actions you can take is available later in this section.

**Prop No**
This is the property number of the item which the EEMR describes.

**Current Act**
This is the current status of the EEMR. For example, if you have previously approved it, you will see an A (for approved) and the date the approval occurred. If this is a new EEMR which you have not previously taken any action on, this field will be blank. You will continue to see all EEMRs for your division until Property Management reviews/approves them.

**Creator**
This is the name of the employee who created the EEMR.

**Emp No**
This is the employee number of the LBL employee to which the property item is assigned.

**Account**
This is the user account for which the property item is being used.
Bldg
This is the number of the building in which the property item is located.

Room
This is the number of the room in which the property item is located. For equipment that is located outside of a building, this may be an area designation.

Area
This field may contain additional information about the location of the property item.

C
This indicates whether comments have been attached to an EEMR. Y indicates that there are comments, N indicates that there are no comments.

The EEMR System will display 10 EEMRs on a screen at a time. For each EEMR, you are given an opportunity to take an action. You may not make any changes to an EEMR; you may only take an action on an EEMR: approve it, disapprove it, hold it, enter comments, or take no action. You may enter actions for any of the displayed EEMRs (use the TAB key to move between EEMRs).

Approve
Approve an EEMR. Taking this action makes the EEMR available for Property Management approval and prevents the creator from making changes to it.

Disapprove
Disapprove an EEMR. Taking this action prevents Property Management from reviewing the EEMR and, in effect, returns it to the creator. The creator may make changes to it.

Hold
Hold an EEMR. Taking this action prevents Property Management from reviewing the EEMR and also prevents the creator from making changes to it. This may be useful if you are not sure what action you wish to take and you want to prevent changes to it while you are reviewing it.

Review in detail
EEMRs are presented on the approval screen in a short form. You see only the new location information. To see more detailed information about what exactly changed about the property's location, choose this action. More information is available in a later section.

Approve & enter comments
If you wish to approve an EEMR and enter comments, choose this action. More information is available in a later section.

Disapprove & enter comments
If you wish to disapprove an EEMR and enter comments, choose this action. This is especially useful for explaining to the creator why the EEMR was disapproved. More information is available in a later section.
Hold & enter comments

If you wish to hold an EEMR and enter comments, choose this action. This is useful if you wish to explain to the creator why you have not yet approved the EEMR. More information is available in a later section.

No action

If you do not take any action for an EEMR, the creator may make changes to it. Property Management will not be able to review it.

When you are satisfied with the actions you wish to take, press the RETURN key. The actions will be processed one at a time. If you choose to approve, disapprove, hold or take no action on an EEMR, no further input is required from you. The EEMR System will process the action and move on to the next EEMR. However, the remaining actions (review in detail, approve & enter comments, disapprove & enter comments, and hold & enter comments) will display additional information and require additional input from you before moving on to the next EEMR. These actions are described in more detail later in this section.

After the actions have been processed, the system will refresh the list of EEMRs and redisplay the ones you just reviewed. The cursor will be positioned at the Next? prompt where you may scroll forward, backward or exit Approve EEMRs.

Reviewing an EEMR in detail

If you choose to review an EEMR in detail, the system will display the current status of the property item as it exists in the Property Management and Accounting System (PMAS) as well as the EEMR. This two-page display will allow you to see exactly what location changes are occurring.

The display format of the first page is virtually the same as the Create/Edit EEMRs: edit data.
screen (shown in the *EEMR System User's Guide*) with one important difference: the information is displayed only, no changes may be made.

The second review page displays any comments that the creator may have entered. At the bottom of this page, and assuming your detailed review is complete, you are given another opportunity to enter an action on the EEMR. Enter the desired action and press the RETURN key.

**Entering comments**

Comments can be especially useful for passing along information. In particular, if you are disapproving an EEMR, you can enter comments explaining why the EEMR was disapproved. Comments are not entered into the PMAS files. If you choose an action that also allows you to enter comments, the EEMR System will process the action and then display the 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 Creator 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, the EEMR System will continue, processing the action taken on the next EEMR.

**Reports**

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

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

All reports available to Division Administrators are also available to Creators. See section: Creator Activities in the EEMR System User’s Guide for information on these reports and additional features such as how to view a FOCUS report on-line or produce a hardcopy. One report, the EEMR Detailed Status Report, is slightly different for Division Administrators and is described in the following section.

EEMR Detailed Status Report

The Detailed Status Report will list all information for all EEMRs for a division only. 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. A Division Administrator will have the option of listing all division EEMRs or all division EEMRs for a property number. A sample of this report is shown in the EEMR System User’s Guide.