



#### **Equipment Utilization Form**

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The **Equipment Utilization Form** may be generated from two processes:

- A. Forms-Reports > Schedule Reports > Equipment Utilization
- B. Utilization > Dispatch > Add/Update

The *Equipment Utilization* Form is also known as the Trip Ticket.

Only assets within your Maintenance Activity, which you have access to, will be shown on this form.

#### **Prerequisites:**

Prior to generating an **Equipment Utilization Form** the following setup is required:

- Access to the Maintenance Activity (MA)
- Access to the M&U Reports & Inquiries role
- Asset must be profiled for Utilization or Maintenance and Utilization

#### Access:

- If you have equipment Pool (EP) access, you will only be able to generate the form for assets assigned to the EP you have access to
- If you have MA access you will be able to generate the form for all the assets in the MA you are currently logged into

You are able to print a standard report message on the form. This capability is set up at the MA level and is defaulted in the Report Message field. This message can be modified before the form is printed.





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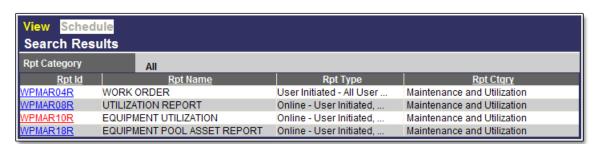
# **Equipment Utilization Form**

To schedule an *Equipment Utilization* Form using **Forms-Reports** perform the following steps:

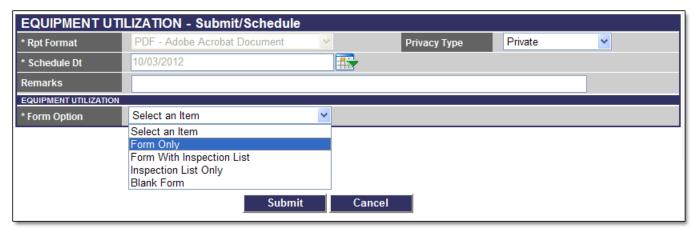
- Select Schedule Reports from the Forms/Reports menu.
  - The **Reports Manager Search Results** page displays a list of reports available for processing.
- 2. Select the **Rpt Id** (WPMAR10R) hyperlink beside **Equipment Utilization**.

You will have four form options available to print:

- 1. Form Only
- 2. Form with Inspection List
- Inspection List Only
- Blank Form



3. The Equipment Utilization - Submit/Schedule page displays.

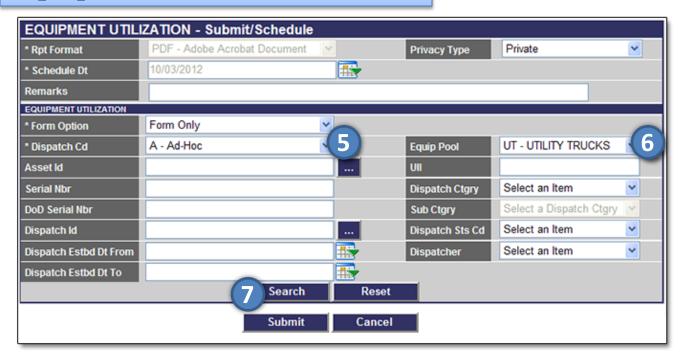


4. Select the type of form you want to schedule from the **Form Option** drop-down list.





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Additional data fields display.

- 5. Select a value from the **Dispatch Cd** drop-down list. The value needs to match the value selected when you profiled your asset in the Maintenance Asset Master (MAM).
- 6. Use the remaining fields to assist in refining your search.
- Select the **Search** button.

To print your forms in mass do not fill in any fields other than the **Dispatch Cd** and/or **Equip Pool**. All profiled assets with the Dispatch Code and Equipment Pool (EP) you select will display for printing. You can also further narrow your search by entering information in the remaining fields.





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The assets you have access to, which meet the search criteria entered above, display in the data grid below the search area.

- 8. Choose the **Select** checkbox for each asset for which you want a report created.
- 9. Add a Report Message (Rpt Msg).
- 10. Enter the Period Dt From and Period Dt To using the Calendar tool.
- 11. Select the **Submit** button.

A successful **Transaction Status** page displays



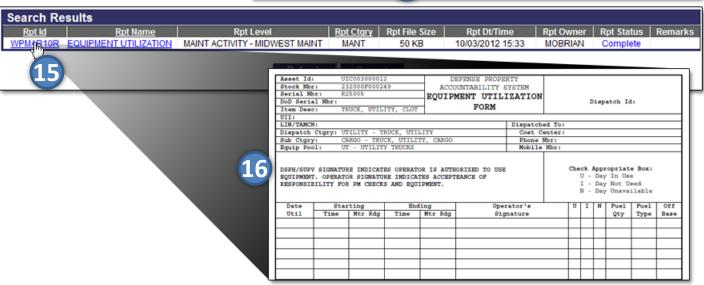




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- 12. Select View Reports from the Forms/Reports menu.
- 13. Accept all default values.
- 14. Select the Search button. The **Search Results** page displays.





If the Rpt Status does not show Complete, select the Refresh button at the bottom of the Search Results page.

- 15. Select either the **Rpt Id** (WPMAR10R) hyperlink for the most recent report or the Rpt Name hyperlink for all reports submitted. If the Rpt Name is chosen, select the report to view.
- 16. Review the displayed report.

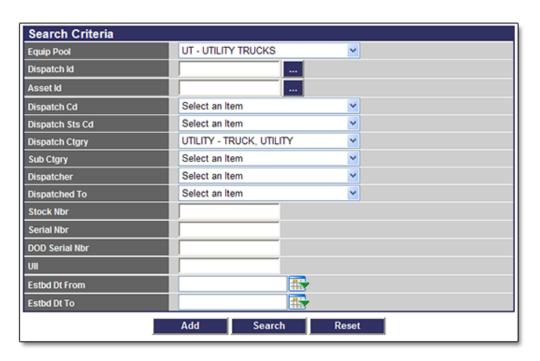




# **Equipment Utilization Form**

To schedule an Equipment Utilization Form using the Dispatch process, use the following steps:

1. Select **Dispatch** from the **Utilization** menu.

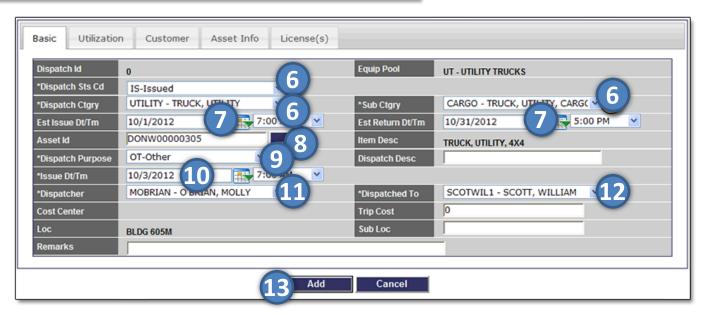


- 2. The **Search Criteria** page displays.
- 3. Select either an Equipment Pool or an Asset Id.
- 4. Select the **Add** button.





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- 6. Select the appropriate option from the **Dispatch Sts Cd**, **Dispatch Ctgry**, and **Sub Ctgry** drop-down lists.
- 7. Enter the Estimated Issue and Return date and times from the Est Issue Dt/Tm and Est Return Dt/Tm using the Calendar tools and time drop-down lists.
- 8. Select the Asset Id using the **Asset Id Browse (...)** button.
- 9. Select the purpose from the **Dispatch Purpose** drop-down list.
- 10. Leave the default date in the Issue Dt/Tm field (if it is an Issue).
- 11. Leave the default in the **Dispatcher** drop-down list.
- 12. Select the person the asset is dispatched to from the **Dispatched To** drop-down list.
- 13. Select the Add button.

A successful **Transaction Status** page displays.

Select the **View** button to review the *Equipment Utilization* Form for the dispatched asset. You may also review the form at any time using the **View/Forms-Reports** process described in the previous section.

