

Department of Veterans Affairs  
Decentralized Hospital Computer Program

# **EQUIPMENT/TURN-IN REQUEST USER MANUAL**

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# **PREFACE**

The Equipment Request/Turn-In Request Module Version 1.0 will provide support to a variety of administrative activities in your medical center, such as your non-expendable equipment requests and any equipment turn-ins.



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# CHAPTER 1 INTRODUCTION

## **1.1 The Role of the Equipment/Turn-In Request Module**

You may be wondering how the Equipment/Turn-In Request Module will change your job. You will be pleased to know your job will not change much. The main difference is that you will be entering data in IFCAP to establish equipment requests or create a turn-in. Since you already use IFCAP, you are already halfway toward becoming a user of this module.

## **1.2 How to Use This Manual**

This guide shows you what you need to know about using the Equipment/Turn-In Request Module. Each procedure contained in the module is explained in full detail. Remember, you can always enter a question mark (?) to ask for help if you forget what to type or you feel unsure of what is required. Your Application Coordinator is also available to answer your questions.

## **1.3 Reference Numbering System**

This guide is divided into explanations of each step that must be successfully completed before the items can be ordered through the normal IFCAP purchasing procedure. By the time you finish this guide, you will know how an equipment request is processed before purchase and how to turn in equipment items.

Using a computer to help you do your job can be very exciting and challenging. Just like learning anything brand new, it can be frustrating in the beginning. Be patient with yourself. Soon you will be an "expert" in doing an Equipment Request or creating a Turn-In.

## **1.4 Package Management, Legal Requirements and Security Measures**

Functionally, the Equipment/Turn-In Request module has several organizational elements that use different components of the software. Non-expendable equipment must go through several approval steps before it can be ordered.

- Requestor
- Consolidated Memorandum of Receipt (CMR) Official
- Personal Property Manager (PPM)
- Equipment Committee
- Engineering
- Other Concurring Officials

Turning in non-expendable equipment also requires several approval steps.

- Requestor

- Consolidated Memorandum of Receipt (CMR) Official
- Personal Property Manager (PPM)
- Engineering
- Warehouse

## **1.5 Package Operation**

All Equipment Requests and Turn-Ins must be completed on the computer. The information the computer requires should be familiar to you. If not, a question mark in response to a prompt from the computer provides you with information which should help you respond.

The questions you see when processing non-expendable equipment requests are different from the questions you see when processing expendable requests. These differences stem from the different requirements. Instead of control points, your non-expendable equipment requests and turn-ins will be tracked by department or Consolidated Memoranda of Receipts (CMR) number. These requests will be sent to the appropriate CMR Responsible Official for approval. Once approved, the requests are released to the A&MM activity for processing.

# CHAPTER 2 REQUESTOR

## 2.1 Introduction

You may be wondering how the Equipment/Turn-In Request module will change your job. You will be pleased to know that with the Equipment/Turn-In Request module, your job will not change much. The main difference is that you will be entering data via an on-line Equipment Request or Turn-In Request.

## 2.2 Step 1

Select the 'Equipment Request Menu (Requestor)' that has been set up on your main menu. Select 'Enter New Equipment Request' to begin the process. If your site parameters are set up for a multi-divisional site, you will be asked to identify the Station Number. If you are not at a multi-divisional site, the prompt will default to your Station Number.

```
Select STATION NUMBER (^ ^ TO EXIT):621// <RET> MOUNTAIN HOME
```

## 2.3 Step 2

You will then be asked to select the CMR Name. Enter a question mark (?) to see the possible CMR numbers/names you can select from. The CMR Responsible Official is the individual designated as the responsible official for a particular CMR.

```
Select CMR NAME: 420 <RET> SUPPLY (OFFICE) ACQUISITION & MATERIEL MGMT SMITH,BILL  
This Request has been assigned Transaction #: 621-420-96-00024
```

Your non-expendable equipment request has now been assigned a temporary transaction number. This will be the identification number for this request during the life-cycle of this process. Upon approval of the request by the Equipment Committee, a 2237 will be established and assigned a permanent transaction number by the A&MM activity.

## 2.4 Step 3

The next important prompt will be the Request Type. The request type will determine the next sequence of questions/steps. Additional means that this request is a normal request for new equipment. Initial means that this request is associated with a construction project. Replacement means that you will be asked to identify what existing equipment this new piece of equipment will replace. A corresponding Turn-In request will be generated along with a Replacement request.

### 2.4.1 Additional Equipment Requests

### 2.4.1.1 Step 1

Begin the request by identifying the request type as Additional.

```
REQUEST TYPE: ? <RET>
CHOOSE FROM:
  A  ADDITIONAL
  R  REPLACEMENT
  I  INITIAL
REQUEST TYPE:  A <RET>      ADDITIONAL
```

### 2.4.1.2 Step 2

The Date Required By field is required. A particular Sort or Classification can also be assigned to the request at this time. Any data entered here will be moved over to the 2237 when the request passes through all stages and is approved and funded.

```
DATE REQUIRED BY: ? <RET>
Examples of Valid Dates:
  Jan 20 1957 or 20 JAN 57 or 1/20/57 or 012057
  T (for TODAY), T+1 (for TOMORROW), T+2, T+7, etc.
If the year is omitted, the computer uses the CURRENT YEAR.
You may omit the precise day, as: JAN, 1957
Enter the date this requested equipment is needed by.
DATE REQUIRED BY:  3.31.95 <RET>  (MAR 31, 1995)
SORT: <RET>
CLASSIFICATION: <RET>
```

### 2.4.1.3 Step 3

There must be at least one line item entered per request. A word-processing Description of the item will then be required. Other fields associated with each line item are: the Potential Vendor, the Vendor Product number, the Unit Cost, the Quantity Required, and the Contract # field. When entering a possible vendor at the Potential Vendor field, the Vendor file (#440) will be checked for any matching vendors. Matching vendors will be filed in the Potential Vendor Ptr field and will show up there in the Display/Print or viewing of the request. If no matching vendor is found in the Vendor file (#440), then the free text vendor which was just entered will be filed in the Potential Vendor field and will show up for that field in the Display/Print or viewing of the request. In the next two screens, Cannon is an example of free text and ABC is an example of a vendor found in the Vendor file (#440). The last important field identifying a line item is the Parent System/Component field. Components may be listed as individual parts that make up the parent system. The Parent item is the primary item tracked by AEMS/MERS, for which a CMR will have ultimate responsibility.

```

Select LINE ITEM: 1 <RET>
DESCRIPTION:
1> copy machine <RET>
2> <RET>
EDIT OPTION: <RET>
POTENTIAL VENDOR: CANNON <RET>
VENDOR PRODUCT #: np6 NP6650 <RET>
UNIT COST: 6790.00 <RET>
QUANTITY REQUIRED: 1// <RET>
CONTRACT #: GS-26F-1016B <RET>
PARENT SYSTEM/COMPONENT: P <RET> PARENT SYSTEM

```

#### 2.4.1.4 Step 4

You will be prompted for another line item. You may enter as many line items as needed or press return to continue with the remaining questions.

```

Select LINE ITEM: 2 <RET>
DESCRIPTION:
1>TYPEWRITER STAND <RET>
2> <RET>
EDIT Option: <RET>
POTENTIAL VENDOR: ABC <RET>
1 ABC NO. 123
ORDERING ADDRESS: 123 BAKER ST.
RICHMOND, VA 23112
2 ABC NO. 336
ORDERING ADDRESS: 12 PENN STATION
NEW YORK, NY 10012
CHOOSE 1-2: 2 <RET> 336
VENDOR PRODUCT #: S-1 <RET>
UNIT COST: 100.00 <RET>
QUANTITY REQUIRED: 1// <RET>
CONTRACT #: <RET>
PARENT SYSTEM/COMPONENT: C <RET> COMPONENT

```

#### 2.4.1.5 Step 5

A justification of why the item or items are being requested is mandatory.

```

JUSTIFICATION: ? <RET>
1> <RET> ?? Justification for this request is required
JUSTIFICATION:
1> TO ASSIST CONTRACT SECTION <RET>
2> <RET>
EDIT Option: <RET>

```

#### 2.4.1.6 Step 6

Change in Personnel would be answered with a 'Yes' if additional personnel are needed to operate this equipment. If answered 'Yes', an explanation is required and should include information as to type of change in personnel, number of personnel and job level.

```

CHANGE IN PERSONNEL: NO// ? <RET>
Enter 'Y' if there will be any changes in number and/or grades of

```

## Requestor

```
personnel.  
Choose from:  
  Y  YES  
  N  NO  
CHANGE IN PERSONNEL: NO// Y <RET>  YES  
CHANGE IN PERSONNEL EXPLAIN:  
  1> <RET> ?? Explanation of change in personnel is required  
CHANGE IN PERSONNEL EXPLAIN:  
  1> WILL BE ABLE TO REDUCE ONE FTEE <RET>  
  2> <RET>  
EDIT Option: <RET>
```

### 2.4.1.7 Step 7

If there is a JCAHO or other safety deficiency, the requestor must explain what it is.

```
JCAHO, CAP, SAFETY DEFICIENCY: NO// ? <RET>  
Enter 'Y' if there are any JCAHO, CAP, or other safety deficiency for  
ordering this equipment.  
Choose from:  
  Y  YES  
  N  NO  
JCAHO, CAP, SAFETY DEFICIENCY: NO// Y <RET>  YES  
DEFICIENCY EXPLANATION:  
  1> <RET> ?? Explanation of the scope of deficiencies is required  
DEFICIENCY EXPLANATION:  
  1>Must be well ventilated. <RET>  
  2><RET>  
EDIT Option: <RET>
```

### 2.4.1.8 Step 8

If there is an **increase** in recurring costs you will be asked if there are sufficient funds budgeted for this increase and to explain the cause of the increase. Also, you must enter the approximate cost for supplies which may occur if this equipment is purchased. If there is a **decrease** in recurring costs, explain why there is a decrease and enter the approximate amount of the decrease. Entering **no change** will go on to the next step without asking for any further information.

```

CHANGE IN RECURRING COSTS: ? <RET>
  Enter the estimated change in recurring costs if this equipment is
  ordered.
  Choose from:
    I      INCREASE
    D      DECREASE
    N      NO CHANGE
CHANGE IN RECURRING COSTS: I <RET>      INCREASE
SUFFICIENT FUNDS BUDGETED?: YES// ? <RET>
  Enter 'Y' if sufficient funds have been budgeted to purchase this
  equipment.
  Choose from:
    Y      YES
    N      NO
SUFFICIENT FUNDS BUDGETED?: YES// <RET>
CHANGE RECUR COST EXPLAIN:
  1> <RET> ?? Explanation of scope of recurring costs is required
CHANGE RECUR COST EXPLAIN:
  1>MORE PAPER NEEDED <RET>
  2><RET>
EDIT Option:<RET>
ANNUAL RECURRING SUPPLY COST: ? <RET>
  Enter the estimated annual cost of recurring supplies for this equipment.
ANNUAL RECURRING SUPPLY COST: 120.00 <RET>

```

### 2.4.1.9 Step 9

The next group of responses is dependent on whether extra training is needed in order to operate the requested equipment. If training is needed, then you must explain the type of training needed and provide an estimated training cost.

```

TRAINING NEEDED?: NO// ? <RET>
  Enter 'Yes' if any special training will be needed to operate this
  new piece of equipment if purchased.
TRAINING NEEDED?: NO// <RET>

```

Requestor

### 2.4.1.10 Step 10

Answer 'Yes' if a maintenance contract recommended for the equipment being requested. If a maintenance contract is recommended, an explanation of why and an estimated cost of the contract are required.

```
MAINT. CONTRACT RECOMMENDED: ? <RET>
  Enter 'Yes' if a maintenance contract comes with the item or is recommended for the item.
  Choose From:
  Y      YES
  N      NO
MAINT. CONTRACT RECOMMENDED: Y <RET> (YES)
MAINT. CONTRACT JUSTIFICATION:
  1) <RET> ?? Explanation of why maintenance contract is recommended, is required
MAINT. CONTRACT JUSTIFICATION:
  1) TO KEEP MACHINE IN RUNNING ORDER <RET>
  2) <RET>
EDIT Option: <RET>
MAINT. CONTRACT COST: ? <RET>
  Enter the estimated cost for a recommended maintenance contract
MAINT. CONTRACT COST: 250.00 <RET>
```

### 2.4.1.11 Step 11

Please indicate if space is available for this equipment and where it will be located. The location may be available from the Space file. If the location is not available from the Space file, then a free text location is acceptable.

```
SPACE AVAILABLE?: YES// <RET>
LOCATION: ? <RET>
  Enter 'Yes' if space is currently available for this equipment
  Choose From:
  Y      YES
  N      NO
SPACE AVAILABLE?: YES// <RET> YES
LOCATION: ?? <RET>
  Enter the location where this item would be located if space is available.

Locations currently in the space file:
  8-310
  8-312
  8-313
  KITCHEN1
  SURGERY ROOM
LOCATION: 8-313 <RET>
```

### 2.4.1.12 Step 12

Please indicate if utilities are required for installation of this equipment. This will help the Engineering department in their evaluation of the request.

```

INSTALLATION NEEDED?: ? <RET>
  Enter 'Yes' if the Engineering Department must install equipment
  Choose from:
    Y   YES
    N   NO
INSTALLATION NEEDED?: N <RET>   NO
Select UTILITIES REQUIRED: ? <RET>
  Answer with UTILITIES REQUIRED
  You may enter an new UTILITIES REQUIRED, if you wish
  Select as many utilities that are needed for installation.
Choose from:
  0           None
  1           Air
  2           Gas
  3           Vacuum
  4           ADP
  5           Plumbing
  6           Electricity-110V
  7           Electricity>208V
  8           Emergency Power
  9           Fire Sprinkler
  10          Exhaust
  11          A/C
  12          Steam
  13          Other
Select UTILITIES REQUIRED:  6 <RET>      (Electricity-110V)
Select UTILITIES REQUIRED: 13 <RET>      (Other)
Select UTILITIES REQUIRED: <RET>
OTHER UTILITIES: ? <RET>
  Enter a free text other utility up to 50 characters.
OTHER UTILITIES: 15 AMP BREAKER NEEDED <RET>

```

### 2.4.1.13 Step 13

Please indicate if there is a point of contact for this request other than yourself. You may select the person from the New Person file (200).

```

SERVICE CONTACT: ? <RET>
  Enter the name of a service contact if other than the requestor.
  Answer with NEW PERSON NAME, INITIAL, SSN, or NICK NAME
  Do you want the entire 36-Entry NEW PERSON LIST?
SERVICE CONTACT: <RET>
SERVICE CONTRACT PHONE: <RET>

```

### 2.4.1.14 Step 14

Send the request to the CMR Responsible Official responsible to review this request.

```

Is this request ready for CMR approval?: Y <RET>   YES

```

After responding 'Yes', the CMR Responsible Official will see a message that a request is available for his/her review and approval when signing onto their Equipment Request Menu.

Requestor

## 2.4.2 Initial Equipment Requests

### 2.4.2.1 Step 1

Initial equipment requests are requests that may go with a particular planned project. These should be items that are required when a project is completed, such as a new patient wing.

```
REQUEST TYPE:  ? <RET>
CHOOSE FROM:
  A  ADDITIONAL
  R  REPLACEMENT
  I  INITIAL

REQUEST TYPE:  I <RET>      INITIAL
```

### 2.4.2.2 Step 2

For an initial equipment request, project number and project manager entries are required. When selecting a project, the Chief Engineer will default for the project manager.

```
PROJECT NUMBER:  <RET> ?? Project Number is required for Initial Requests
PROJECT NUMBER:  ? <RET>

ENTER THE OFFICIALLY ASSIGNED PROJECT NUMBER (must begin with 3 numerics and use
dashes as delimiters)

Must begin with station number. Enter '??' for more help text.

Project currently in the Project File:
PROJECT NUMBER:
621-00-101          New Kitchen
621-00-102          New Patient Room
621-301            Audiovisual Center
PROJECT NUMBER:  621-301 <RET>
PROJECT MANAGER: <RET> ?? Project Manager is required when a Project number is entered!
PROJECT MANAGER:  BEHRENDT, JOHN <RET>
```

### 2.4.2.3 Step 3

Follow 2.4.1.2 Step 2 through 2.4.1.13 Step 14 to complete an initial request.

## 2.4.3 Replacement Equipment Requests

### 2.4.3.1 Step 1

If equipment needs to be replaced, a simultaneous turn-in request will be generated with the new requested equipment by selecting a replacement request type.

```

REQUEST TYPE:  ? <RET>
  Select appropriate type for this request.  Additional for new equipment, Initial for project
  equipment, and Replacement for equipment to be replaced.
  Choose From:
    A  ADDITIONAL
    R  REPLACEMENT
    I  INITIAL
REQUEST TYPE:  R <RET>      REPLACEMENT
The corresponding Turn-In Transaction # is:  621-420-96-00026

```

### 2.4.3.2 Step 2

As with initial type requests, replacement requests prompt you to enter a project number and project manager. Unlike an initial request, however, these are not required entries, and you may pass them by pressing return.

```

PROJECT NUMBER:  ? <RET>
  ENTER THE OFFICIALLY ASSIGNED PROJECT NUMBER (must begin with 3 numerics and use
  dashes as delimiters).

Must begin with station number.  Enter '??' for more help text.

Projects currently in the Project File:
PROJECT NUMBER:  <RET>
PROJECT MANAGER:  ? <RET>
  Please enter the Project Manager
Answer with NEW PERSON NAME, INITIAL, SSN, or NICK NAME
Do you want the entire 36-Entry NEW PERSON LIST?  N <RET>
PROJECT MANAGER:  <RET>

```

### 2.4.3.3 Step 3

Follow 2.4.1.3 Step 3 to enter line items.

### 2.4.3.4 Step 4

In a replacement equipment request, part of entering line items includes entering the item which is being replaced. For every quantity entered, if an item has been designated as a Parent, you are required to enter a replacement item from the AEMS/MERs file. It is not mandatory to enter a replacement item if a requested item is a Component. The items from which you may select from will be limited to those items which fall under the CMR to which you are directing this request. For example, if you are requesting 3 replacement trucks, you must identify the three trucks which will be replaced and turned in.

## Requestor

```
Select the Replacement Item to correspond with Line Item #1 Quantity:  1 <RET>
Select REPLACEMENT ITEM:  ? <RET>
  Answer with EQUIPMENT INV. ENTRY NUMBER, MANUFACTURER, MFGR. EQUIPMENT NAME,
  MODEL, SERIAL #, CATEGORY STOCK NUMBER, or LOCATION
Do you want the entire EQUIPMENT INV. List?  N <RET>      (NO)
Select REPLACEMENT ITEM:  36115-5020 11644 <RET>  PERSONAL SHREDDER  IN USE 3615-5020
CSN: 1005-000667
Description:  PERSONAL SHREDDER
Model #:
Manufacturer: ZZ DATATECH      Serial #: 6082200144L
Acquisition Value: $415.70    Last Location: 1548
CMR: 420 SUPPLY (OFFICE)
Are you sure that PERSONAL SHREDDER is the correct item being replaced by requested item,
SHREDDING MACHINE?  Y <RET>      (YES)
```

### 2.4.3.5 Step 5

After selecting the correct replacement item, indicate why this item needs to be replaced. If the reason is not listed, enter other and enter a reason up to 70 characters.

```
Replacement Justification:  ? <RET>
Choose From:
1  Fair wear and tear
2  Excess equipment failure/repair
3  Upgrade
4  State-of-art technology
5  Replacement due to loss or damage
6  Other
Replacement Justification:  4 <RET>      State-of-art technology
Select LINE ITEM NUMBER:  <RET>
```

### 2.4.3.6 Step 6

Follow 2.4.1.5 Step 5 through 2.4.1.14 Step 14 to complete a replacement equipment request. **Reminder:** There are now two requests on file, one replacement request and one turn-in request for the item being replaced.

## 2.5 Edit Equipment Request

If you exit the system before completing a new equipment request, or a request is returned by other reviewers, you may edit the request. You will not be allowed to edit the request type. If the request type is not accurate, you must cancel and re-enter the request.

### 2.5.1 Step 1

Answering 'No' to the question, 'Do you want to edit this request?' returns you to the menu.

```
Select EQUIPMENT REQUEST TRANSACTION NUMBER: 621-666-95-00001 <RET>
Do you want to view the information related to this request? Yes// N <RET> NO
Do you want to edit this request? NO// <RET>
```

### 2.5.2 Step 2

Data editing begins with DATE REQUIRED BY for additional type requests and PROJECT NUMBER for replacement and initial requests. The prompts are the same as entering a new equipment request and defaults to information already entered. You will be prompted if this request is ready to go to the CMR Official. If you do not answer 'Y'es then you may edit the request further. Once it has gone to the CMR Responsible Official, no further editing is allowed unless it is returned to you as a result of non-approval by other responsible officials during the review process. Other options available are cancel or split the request. These options will be discussed in 2.6 Cancel Equipment Request and 2.10 Split Equipment Request.

```
Select EQUIPMENT REQUEST TRANSACTION NUMBER:
Do you want to view the information related to this request? Yes// <RET>
Do you want to edit this request? NO// <RET> Y Yes
DATE REQUIRED BY: JAN 1, 1995// <RET>
SORT: <RET>
CLASSIFICATION: <RET>
Select LINE ITEM: 1 <RET>
DESCRIPTION:
  1>Surgery tables <RET>
  2> <RET>
EDIT Option: <RET>
POTENTIAL VENDOR: <RET>
VENDOR PRODUCT #: <RET>
UNIT COST: 50.00//75.00 <RET>
QUANTITY REQUIRED: 5// <RET>
CONTRACT #: <RET>
PARENT SYSTEM / COMPONENT: COMPONENT// <RET>
Select LINE ITEM: <RET>
```

### 2.5.3 Step 3

Follow 2.4.1.2 through 2.4.1.14 to complete request.

## 2.6 Cancel Equipment Request

You may need to cancel an equipment request that has not been approved by the CMR Responsible Official, the Personal Property Manager. It must be returned to your control before you may cancel it. You may also, at any time, cancel a request that has not been completed or forwarded to the CMR Responsible Official.

Requestor

### 2.6.1 Step 1

Select the transaction you wish to cancel.

```
Enter TRANSACTION #: ? <RET>
ANSWER WITH EQUIPMENT REQUEST NUMBER, OR TRANSACTION NUMBER
CHOOSE FROM:
1      621-666-95-00001  Pending Completion by Requestor
3      621-666-95-00003  Pending Completion by Requestor
7      621-666-95-00007  Returned by CMR Official - Not Approved
8      621-666-95-00008  Returned by CMR Official - Not Approved
10     621-666-95-00009  Returned by PPM - Item Not NX
Enter TRANSACTION #: 3 <RET> 621-666-95-00003  Pending Completion by Requestor
```

### 2.6.2 Step 2

Information concerning this request will display for your review.

```
Service:  INFO RESOURCES MGMT                CMR Official:  JACKSON,ANNE
Requestor:  QUE,SUZIE                        Date Entered:  DEC 07,1993
Line Items:
1  AIR CONDITIONER          $900.00

Are you sure you want to cancel this transaction? NO// ? <RET>
Please enter 'Y' to cancel this transaction.

Are you sure you want to cancel this transaction? NO/ Y <RET> (YES)
```

### 2.6.3 Step 3

Enter a reason why the request is being cancelled.

```
REASON CANCELLED:
1>MISTAKEN ENTRY <RET>
2> <RET>
EDIT Option: <RET>

Transaction #3 has been cancelled.
```

### 2.6.4 Step 4

If the request is a replacement equipment request and has an associated turn-in document, you will be asked to cancel the turn-in document.

```
Transaction #621-666-95-00012 has been cancelled.

Do you want to cancel the corresponding Turn-In Request? NO// Y <RET> (YES)
Turn-In Request #20 cancelled.
```

## 2.7 Request Status Report

If you would like to see the status of the equipment requests that you have entered, run the Request Status Report.

```

Equipment Request Status Report by requestor QUE,SUZIE
Transaction #      Description                Status                Date                Status
Entered          Date
-----
621-123-96-00009  BATHTUB/SINK                Pending CMR Official 06/13/96            06/13/96
621-136-96-00013  ENGINEERING PROJECT        Pending Engineering 03/18/96            03/18/96
621-136-96-00014  HYDRAULIC LIFT MACHI       Pending Engineering 03/18/96            05/06/96
621-136-96-00015  WATERHEATER, 100 CUB       Pending CMR Official 03/18/96            03/18/96

```

## 2.8 Display/Print Equipment Request

Use this menu option to print out a hardcopy of a request.

```

Select Equipment Request Menu (Requestor) Option: DIS <RET> play/Print Equipment Requests
(Requestor)
Select EQUIPMENT REQUEST TRANSACTION NUMBER:  ?? <RET>

Choose From:
  621-780-95-00001  Cancelled Request
  621-780-95-00001A Cancelled Request
  621-780-95-00001B Pending Completion by Requestor
  621-780-95-00002  Cancelled Request
  621-780-95-00004  Pending Equipment Committee Approval
  621-780-95-00005  Approved - Funded
  621-780-95-00009  Cancelled Request
  621-780-95-00012  Cancelled Request
  621-780-95-00014  Pending Completion by Requestor
  621-780-95-00017  Pending CMR Official Review
  621-780-95-00019  Pending Completion by Requestor
  621-780-95-00010  Disapproved - Do Not Resubmit

Enter TRANSACTION #:  621-782-96-00002B <RET>                Disapproved - Do Not Resubmit

Do you want to view the information related to this request? NO/ Y <RET> Yes
DEVICE: <RET>                MARGIN: <RET>

```

## 2.9 Resubmit Requests

Use this option to resubmit certain requests. The request will go back to pending Equipment Committee review and approval without having to go through all the steps again.

Requestor

### 2.9.1 Step 1

Review the transactions that are eligible for resubmission.

```
Select Equipment Request Menu (Requestor) Option:  RE <RET> submit Equipment Requests
Select EQUIPMENT REQUEST TRANSACTION NUMBER:  ?? <RET>

CHOOSE FROM
        621-420-96-00024      Pending PPM Review
        621-420-96-00024      Pending PPM Review
        621-420-96-00027      Returned by CMR Official-Not Approved

Select EQUIPMENT REQUEST TRANSACTION NUMBER:
```

### 2.9.2 Step 2

Resubmitted requests are assigned the status which reflects the approval steps they have already been through.

```
Do you want to view the information related to this request? No// <RET>
Is this request ready to go? Yes// ? <RET>

Enter 'Yes' if this request is ready to be resubmitted. Request will become
'Pending Equipment Committee Review/Rank' if status was 'Deferred - Resubmit'.
Or status will become 'Ready for 2237 Processing' if status was 'Approved - Pending
Funding'. Or status will become 'Pending CMR Official Review' if status was 'Returned
by CMR Official-Not Approved'.

Is this request ready to go? Yes// <RET>
```

## 2.10 Split Equipment Request

This option allows for splitting a request if returned to the requestor. Any new transaction number will be the same as the old number, but have a new suffix added to it, e.g. A, B, C.

```

Select EQUIPMENT REQUEST TRANSACTION NUMBER:  ?? <RET>
CHHOSE FROM:
  1      621-666-95-00001      Pending Completion by Requestor
  2      621-666-95-00002      Returned by PPM - Item Not NX
Select EQUIPMENT REQUEST TRANSACTION NUMBER:  621-666-95-00002 <RET> Returned by PPM - Item Not
NX
  LINE ITEM NUMBER:  1
  DESCRIPTION:
    XRAY FILM
  POTENTIAL VENDOR:                                VENDOR PRODUCT #:
  UNIT COST:  100.00                                QUANTITY REQUIRED:  5
  TOTAL COST:  500.00
Transfer this line item to the new request?  YES// <RET>  (YES)
  LINE ITEM NUMBER:  2
  DESCRIPTION:
    IBM SELECTRIC III
  POTENTIAL VENDOR:                                VENDOR PRODUCT #:
  UNIT COST:  700.00                                QUANTITY REQUIRED:  1
  TOTAL COST:  700.00
Transfer this line item to the new request?  YES// N <RET>  (NO)
  LINE ITEM NUMBER:  3
  DESCRIPTION:
    ADDRESSOGRAPH LABEL MACHINE
  POTENTIAL VENDOR:                                VENDOR PRODUCT #:
  UNIT COST:  500.00                                QUANTITY REQUIRED:  1
  TOTAL COST:  500.00
Transfer this line item to the new request?  YES// N <RET>  (NO)
Splitting this request.  Please wait...
New Transaction Number is:  621-666-95-00001A

```

## 2.11 Process Equipment Turn-Ins Menu

If you wish to turn-in equipment without ordering replacement equipment, select the Process Equipment Turn-Ins menu option so that the request may go through the proper channels.

### 2.11.1 Enter Excess Equipment Turn-In Request

#### 2.11.1.1 Step 1

Select the Enter Excess Equipment Turn-In Request option from the Process Turn-Ins menu. The first two entries you make establish the temporary request number for this turn-in document. If your site parameters are set up for a multi-divisional site, you will be asked to identify the Station Number, otherwise it will default to your station number.

```

Select STATION NUMBER (^ TO EXIT):621// <RET>      MOUNTAIN HOME

```

Requestor

### 2.11.1.2 Step 2

Select the CMR Responsible Official responsible for the equipment being turned in.

```
Select CMR NAME: 420 <RET> SUPPLY (OFFICE) ACQUISITION & MATERIAL MGMT SMITH,BILL
This Request has been assigned Transaction #: 621-420-96-00028
```

Your equipment turn-in document has now been assigned a temporary transaction number. Refer to this number during the life cycle of the request.

### 2.11.1.3 Step 3

You will be asked next to select the items from the Equipment Inventory (AEMS/MERS) file that you wish to turn in. After you have selected and filled in the justification for turning in this equipment, it will go to the responsible CMR Responsible Official for review and approval.

```
Select REPLACEMENT ITEM NUMBER: 76096 11077 <RET> BINDING SYSTEM IN USE 3610-5052
TURN-IN LINE ITEM TURN-IN LINE ITEM NUMBER: 1// <RET>
TURN-IN LINE ITEM DESCRIPTION: BINDING SYSTEM// <RET>
CSN: 1005-000667
Description: BINDING SYSTEM
Model #: 750 Serial #: 76096
Manufacturer: ZZVELOBIND Last Location:
Acquisition Value: $3296.00 CMR: 420 SUPPLY (OFFICE)
JUSTIFICATION: ?
CHOOSE FROM:
1 Fair wear and tear
2 Excess equipment failure/repair
3 Upgrade
4 State-of-art technology
5 Replacement due to loss or damage
6 Other
JUSTIFICATION: 2 <RET> Excess equipment failure/repair
Select TURN-IN LINE ITEM: <RET>
Is this request ready for CMR Approval? Y <RET> YES
```

### 2.11.2 Edit Excess Equipment Turn-In Document

If a turn-in document has been left incomplete, then the ability exists for you, the requestor, to make changes and even add additional items.

```
Select TURN-IN REQUEST TRANSACTION CODE: 621-420-96-00028 <RET> Pending CMR Official Review
DEVICE: HOME// <RET> LAN

TRANSACTION CODE: 621-420-96-00028 REQUESTOR: QUE,SUZIE
REQUESTING SERVICE: ACQUISITION & MATERIEL MGMT STATION NUMBER: 621
REQUEST DATE/TIME: MAR 06, 1996@09:57:56 CMR RESPONSIBLE OFFICIAL: JACKSON,ANNE
STATUS DATE: MAR 06, 1996 CMR OFFICIAL APPROVAL:
CMR OFFICIAL EXPLANATION:

TURN-IN LINE ITEMS: 1
EQ. REQUEST LINE NUMBER: 345
MFGR. EQUIPMENT NAME: BINDING SYSTEM
MANUFACTURER: ZZ VELOBIND
MODEL: 750
NXRN #: 18329
ACQUISITION VALUE: 3296.00
CMR: 420 SUPPLY (OFFICE)
LOCATION:
WAREHOUSE OFFICIAL:

Serial #: 76096
CATEGORY STOCK NUMBER: 3610-438983
ACQUISITION DATE: MAR 09, 1992
REPLACEMENT DATE: MAR 09, 2007
```

### 2.11.3 Cancel Excess Equipment Turn-In Request

The ability to cancel an incomplete or returned turn-in document also exists.

```
Enter TRANSACTION #: ? <RET>
ANSWER WITH EQUIPMENT REQUEST NUMBER, OR TRANSACTION NUMBER
CHOOSE FROM:
1 621-666-95-00006 Pending Completion by Requestor

Enter TRANSACTION #: 1 <RET> 621-666-95-00006 Pending Completion by Requestor

Service: IRM CMR Official: JACKSON,ANNE
Requester: QUE,SUZIE Date Entered: DEC 07, 1993
Line Items:
Number: 1 Description: CONT BARIUM FLOW XRAY
Number: 2 Description: COMPUTER DIGITAL

Are you sure you want to cancel this turn-in? NO// Y <RET> (YES)
```

Requestor

## CHAPTER 3 CMR RESPONSIBLE OFFICIAL

Below you will see a brief description of the options and sub-menus found on the Equipment Request menu if you are the assigned CMR Responsible Official. A quick review of these descriptions should help you understand when to use an option. The rest of this manual goes into detail explaining how to use each option.

```
ACCESS CODE: CODE <RET>
VERIFY CODE: CODE <RET>
Good afternoon FRANCIS You last signed on today at 13:46
Select TERMINAL TYPE NAME: C-VT220// <RET>
    Digital Equipment Corporation VT-220 terminal

There are 2 equipment requests Pending CMR Official Review

There is 1 turn-in request Pending CMR Official Review.

    Enter New Equipment Request
    Edit Equipment Request
    Cancel Equipment Request
    Request Status Report
    Display/Print Equipment Requests (CMR)
    Approve Equipment Requests (CMR Official)
    Resubmit Request (CMR)
    Process Equipment Turn-Ins Menu ...

Select CMR Official Equipment Request Menu Option:
```

### 3.1 Enter New Equipment Request

A CMR Responsible Official can enter requests for equipment.

### 3.2 Edit Equipment Request

A CMR Responsible Official can also edit equipment requests if necessary. Please review Chapter 2 on how to edit Equipment Requests

### 3.3 Cancel Equipment Request

A CMR Responsible Official can also cancel equipment requests that he/she has entered. Please review Chapter 2 on how to cancel Equipment Requests.

### 3.4 Request Status Report

If you would like to see the status of equipment requests that you, the CMR Responsible Official, have approved, run the Request Status Report. It will print all the requests that were submitted to you.

```
Equipment Request Status Report by CMR Official SMITH,BILL
```

Transaction #	Status	Date Entered	Status Date
621-780-96-00004	Pending Equipment Committee Approval	02/09/96	08/03/96
621-780-96-00014	Pending Completion by Requestor	04/11/96	06/30/96
621-780-96-00017	Pending CMR Official Review	06/30/96	06/30/96
621-780-96-00019	Pending Completion by Requestor	06/30/96	06/30/96
621-781-96-00011	Ready for 2237 Processing	05/18/96	07/27/96
621-781-96-00001	Pending Equipment Committee Approval	06/21/96	08/03/96
621-781-96-00002	Ready for 2237 Processing	06/22/96	07/27/96
621-781-96-00004	Pending Equipment Committee Approval	07/31/96	08/03/96
621-781-96-00005	Pending Equipment Committee Approval	07/31/96	08/02/96
621-781-96-00008	Pending PPM Review	08/04/96	08/04/96
621-782-96-00002	Pending Equipment Committee Approval	07/28/96	08/02/96

### 3.5 Display/Print Equipment Request

Use this menu option to print out a hardcopy of a request.

```
Select CMR Official Menu Option: DIS <RET> play/Print Equipment Request (CMR)
Select EQUIPMENT REQUEST TRANSACTION NUMBER: ?? <RET>
Choose from:
49 621-420-96-00027      Pending CMR Official Review

Select EQUIPMENT REQUEST TRANSACTION NUMBER: 49 <RET>      621-420-96-00027      Pending CMR Official
Review
Do you want to view the information related to this request: N// Y <RET> (YES)
DEVICE: HOME// <RET>      LAN
```

### 3.6 Approve Equipment Requests (CMR Responsible Official)

The CMR Responsible Official must review and approve equipment requests. Ultimately the CMR Responsible Official is responsible for the inventory of that item. If the CMR Responsible Official does not approve the request at this time, it will be returned to the user with an explanation. If the CMR Responsible Official does approve this request, he/she must sign off his/her approval. At this time they may also assign a priority to this request. This priority assists the Equipment Committee in determining the importance of this item to the using service.

### 3.6.1 Step 1

Select the option Approve Equipment Requests (CMR Official) from the menu option.

### 3.6.2 Step 2

Select the request transaction to review.

```
Select EQUIPMENT REQUEST TRANSACTION NUMBER:  ? <RET>

CHOOSE FROM:
43 621-132-96-00005      Final CMR Confirmation
47 621-420-96-00024      Pending CMR Official Review
48 621-420-96-00025      Pending CMR Official Review
49 621-420-96-00027      Pending CMR Official Review
Select EQUIPMENT REQUEST TRANSACTION NUMBER: 47 <RET>      621-420-96-00024      Pending CMR
Official Review

Do you want to view the information related to this request? Yes// <RET>
```

### 3.6.3 Step 3

Answer either 'Yes' to approve the request or 'No' to disapprove the request.

```
CMR OFFICIAL APPROVAL:  ? <RET>
Enter 'Yes' if you approve this request.
Choose from:
  Y      YES
  N      NO
CMR OFFICIAL APPROVAL:  Y <RET>  YES
```

### 3.6.4 Step 4

If the request is not to be approved, an explanation is required. A mail message will be sent to the requestor which will include the explanation. See 3.6.6 Step 6 for a sample mail message.

```
CMR OFFICIAL APPROVAL:  ? <RET>
Enter 'Yes' if you approve this request.
Choose from:
  Y      YES
  N      NO
CMR OFFICIAL APPROVAL:  N <RET>  NO
CMR APPROVAL EXPLANATION:
1> <RET>
CMR APPROVAL EXPLANATION:
1> Don't wish to order these items at this <RET>
2> time. <RET>
3> <RET>
EDIT OPTION: <RET>
```

### 3.6.5 Step 5

The next step is to identify a priority. This priority will show the PPM and the Equipment Committee the importance of this request.

```
CMR PRIORITY: 2//? <RET>
Enter the number that you consider to be the priority of this request.
(1-999)
Priority list for ACQUISITION & MATERIEL MGMT:
1      621-430-96-00003

CMR PRIORITY: 2// <RET>
ENTER YOUR ELECTRONIC SIGNATURE CODE: SIGNATURE <RET>      Thank you.
```

### 3.6.6 Step 6

This is a sample mail message that will be sent to the requestor when a request is not approved.

```
Subj: REQUEST NOT APPROVED [#11223]      08 Aug 96 13:42      5 Lines
From: SMITH,BILL      in 'IN' basket.      page 1      **NEW**
-----
Your NX Equipment Request, Transaction #: 621-420-96-00024
was not approved by CMR Responsible Official, SMITH,BILL.
Explanation:
Don't wish to order these items at this time
```

## 3.7 Process Equipment Turn-Ins

The CMR Responsible Official must review and approve Turn-In documents since they are responsible for that equipment.

### 3.7.1 Approving Turn-In Request

The CMR Responsible Official will be notified when a turn-in request has been generated and will select the Process Equipment Turn-Ins Menu option.

```
Good morning BILL      You last signed on today at 11:10

There are 3 equipment requests Pending CMR Official Review.

Enter New Equipment Request
Edit Equipment Request
Cancel Equipment Request
Request Status Report
Display/Print Equipment Request (CMR)
Approve Equipment Requests (CMR Official)
Process Equipment Turn-Ins Menu ...

Select CMR Official Equipment Request Menu Option: PRO <RET> ccess Equipment Turn-Ins Menu
```

After selecting the Process Equipment Turn-Ins Menu option, the CMR Official will have the following selections.

```

Enter Equipment Turn-In Request
Edit Equipment Turn-In Request
Cancel Turn-In Request
Display/Print Turn-In Request
Approve Equipment Turn-In Request (CMR)
Select Process Equipment Turn-Ins Menu Option:
    
```

### 3.7.1.1 Enter Equipment Turn-In Request

Select Enter Equipment Turn-In Request option from menu. A CMR Responsible Official can act as a requestor for entering turn-in documents.

#### 3.7.1.1.1 Step 1

Select the CMR Responsible Official record in which item(s) to be turned in are located.

```

Select CMR NAME:  ? <RET>
Choose from:
  422  SURGERY          JONES,TOM
  423  SURGERY          JONES,TOM
  500  RADIOLOGY       SENATORE,MIKE
  666  INFO RESOURCES JACKSON,ANNE
  780  ACQUISITION & MATERIEL MGMT SMITH,BILL
  781  ACQUISITION & MATERIEL MGMT SMITH,BILL
Select CMR NAME:  780 <RET>  ACQUISITION & MATERIEL MGMT  SMITH,BILL

This Request has been assigned Transaction #:  621-780-96-00012
    
```

### 3.7.1.1.2 Step 2

Select the item or items to be turned in.

```
Select REPLACEMENT ITEM NUMBER: ? <RET>
Answer with TURN-IN LINE ITEM TURN-IN LINE ITEM NUMBER, or
REPLACEMENT ITEM NUMBER
You may enter a new TURN-IN LINE ITEM, if you wish
Please select the entry from the Equipment Inventory file that you
wish to turn-in.

Choose From:
3 BLOOD CHEMICAL ANALYZER
9 BATHTUB WHIRLPOOL UNIT
10 BATHTUB WHIRLPOOL UNIT
11 BATHTUB WHIRLPOOL UNIT
20 HONEYWELL CONTROL MONITOR
22 HONEYWELL CONTROL MONITOR
23 HONEYWELL CONTROL MONITOR

Select REPLACEMENT ITEM: 23 <RET> HONEYWELL CONTROL MONITOR

TURN-IN LINE ITEM TURN-IN LINE ITEM NUMBER: 1// <RET>
TURN-IN LINE ITEM DESCRIPTION: HONEYWELL CONTROL MONITOR
Replace <RET>
CSN: 1005-000667
Description: HONEYWELL CONTROL MONITOR
Model #: Serial #:
Manufacturer:
Acquisition Value: $150.00 CMR: 780
JUSTIFICATION: ? <RET>
Choose From:
1 Fair wear and tear
2 Excess equipment failure/repair
3 Upgrade
4 State-of-art technology
5 Replacement due to loss or damage
6 Other
Replacement Justification: 4 <RET> State-of-art technology
Select REPLACEMENT ITEM NUMBER: <RET>
```

### 3.7.1.1.3 Step 3

Send request to the appropriate CMR Responsible Official for review and approval.

```
Is this request ready for CMR Approval? ? <RET>

A 'Yes' answer moves the request to the next level, a 'No' answer maintains request
at your level.

Is this request ready for CMR Approval? Y <RET> YES
```

### 3.7.1.2 Edit Equipment Turn-In Request

See 2.11.2 for more information.

### 3.7.1.3 Cancel Turn-In Request

See 2.11.3 for more information.

### 3.7.1.4 Display/Print Turn-In Request

```

Select Turn-In TRANSACTION #: ? <RET>
Answer with TURN-IN REQUEST NUMBER, or TRANSACTION CODE
Do you want the entire 34-Entry TURN-IN REQUEST List? Y <RET> (Yes)
Choose from:
25          621-780-95-00007      Turn-in Completed
26          621-780-95-00012      Pending PPM Final Disposition
27          621-323-95-00002      Pending PPM Final Disposition
28          621-323-95-00003      Pending Warehouse Pickup
29          621-123-96-00006      Cancelled Request
30          621-123-96-00007      Cancelled Request
31          621-666-96-00001      Pending Warehouse Pickup
38          621-666-96-00010      Pending PPM Review
39          621-136-96-00002      Pending PPM Review
49          621-780-96-00001      Pending CMR Official Review
50          621-780-96-00002      Pending Completion by Requestor
51          621-780-96-00003      Pending CMR Official Review
52          621-780-96-00004      Pending CMR Official Review
53          621-780-96-00006      Pending Completion by Requestor
54          621-666-96-00013      Pending Completion by Requestor
55          621-666-96-00015      Pending Completion by Requestor

Select Turn-In TRANSACTION #: 39 <RET>      621-136-96-00002      Pending PPM Review
DEVICE: HOME// <RET>

TRANSACTION CODE: 621-136-96-00002      REQUESTOR: QUE,SUZIE
REQUESTING SERVICE: ENGINEERING
REQUEST DATE/TIME: MAR 01, 1996@15:35:55 STATION NUMBER: 621
CMR RESPONSIBLE OFFICIAL: JACKSON,ANNE
REQUEST STATUS: Pending PPM Review
STATUS DATE: MAR 08, 1996      CMR OFFICIAL APPROVAL: YES
CMR OFFICIAL EXPLANATION:

TURN-IN LINE ITEMS:
EQ. REQUEST LINE NUMBER:
ENTRY NUMBER: 51
MFGR. EQUIPMENT NAME: HYDRAULIC LIFT BED
MANUFACTURER:
MODEL:      SERIAL #:
NXRN #:      CATEGORY STOCK NUMBER:
TOTAL ASSET VALUE:      ACQUISITION DATE:
CMR: 136      REPLACEMENT DATE:
LOCATION:
JUSTIFICATION: Fair wear and tear
OTHER JUSTIFICATION:

Press RETURN to continue, or '^' to exit. <RET>

DISPOSAL CONDITION CODE:
WAREHOUSE OFFICIAL:

TOTAL REPAIR COSTS: 0

```

### 3.7.1.5 Approve Equipment Turn-In Request

The CMR Responsible Official responsible for the equipment must review and approve any turn-in documents prior to review by the Personal Property Manager.

## CMR Responsible Official

### 3.7.1.5.1 Step 1

Select the request you wish to review.

```
Select CMR Official Menu Option: APP <RET> rove Equipment Turn-In Request (CMR)
Select TURN-IN REQUEST TRANSACTION CODE: ? <RET>
Choose from:
49 621-420-96-00028      Pending CMR Official Review
Select TURN-IN REQUEST TRANSACTION CODE: 49 <RET>      621-420-96-00028      Pending CMR Official
Review
DEVICE: HOME// <RET> LAN
```

### 3.7.1.5.2 Step 2

The request will display on the screen.

```
TRANSACTION CODE: 621-420-96-00028      REQUESTOR: QUE,SUZIE
REQUESTING SERVICE: ACQUISITION & MATERIEL MGMT
REQUEST DATE/TIME: MAR 06, 1996@09:57:56      STATION NUMBER: 621
CMR RESPONSIBLE OFFICIAL: SMITH,BILL
REQUEST STATUS: Pending CMR Official Review
STATUS DATE: MAR 06, 1996

TURN-IN LINE ITEMS: 1
EQ. REQUEST LINE NUMBER: 345
MFGR. EQUIPMENT NAME: BINDING SYSTEM
MANUFACTURER: ZZ VELOBIND
MODEL: 750      SERIAL #: 76096
NXRN #: 18329      CATEGORY STOCK NUMBER: 3610-438983
ACQUISITION VALUE: 3296.00      ACQUISITION DATE: MAR 09, 1992
CMR: 420 SUPPLY (OFFICE)      REPLACEMENT DATE: MAR 09, 2007
LOCATION:
WAREHOUSE OFFICIAL:

CMR OFFICIAL APPROVAL: Y <RET> YES

ENTER YOUR ELECTRONIC SIGNATURE CODE: SIGNATURE <RET>      Thank you.
```

# CHAPTER 4 PERSONAL PROPERTY MANAGER (PPM)

The Personal Property Manager (or PPM) has many levels of review for both equipment and turn-in requests. When you sign onto the Equipment Request Menu (PPM), you will see the number and status of equipment and turn-in requests.

```
Good afternoon GEORGE You last signed on today at 12:59 P.M.
Select TERMINAL TYPE NAME: C-VT220// <RET>
    Digital Equipment Corporation VT-220 terminal

There are 3 equipment requests Pending PPM Review.
There are 2 equipment requests Engineering Review Completed.
There are 5 equipment requests Ready for 2237 Processing.

There are 2 turn-in requests Pending PPM Review.
There is 1 turn-in request Pending PPM Final Disposition.

    Review Equipment Requests (PPM)
    Edit Equipment Requests (PPM)
    Cancel Equipment Requests
    Rank Equipment Requests
    Create 2237 (PPM)
    Display/Print Equipment Requests (PPM)
    Equipment Request Reports Menu ...
    Process Equipment Turn-Ins Menu ...

Select Equipment Request Menu (PPM) Option:
```

## 4.1 Review Equipment Request (PPM)

### 4.1.1 Step 1

Select request to review. You must determine whether or not the requested item is considered non-expendable (either capitalized or expensed). If you determine that the item is not non-expendable, the request is returned to the requestor with a mail message. A copy of the mail message will go to the CMR Responsible Official who approved the request. An explanation detailing why this item is not considered non-expendable will be included in this message.

```

Select EQUIPMENT REQUEST TRANSACTION NUMBER: 47 <RET>    621-420-96-00024    Pending PPM Review

Do you want to view the information related to this request? Yes// <RET>

Is this NX Equipment?: ? <RET>
Enter 'Yes' if this equipment is considered to be non-expendable equipment.
Choose from:
    Y      YES
    N      NO
Is this NX Equipment? N <RET>    NO
NX EQUIP EXPLANATION:
1> <RET>    ?? An explanation of why this request is not NX is required.
NX EQUIP EXPLANATION:
1> REALLY SHOULD BE ORDERED THROUGH SUPPLY <RET>
2> <RET>
EDIT Option: <RET>
    
```

**4.1.2 Step 2**

Sample mail message to the requestor and CMR Responsible Official.

```

Subj: REQUEST NOT NX    [#13224]    08 Jul 96 14:41    7 Lines
From: WASHER,GEORGE in 'IN' basket.    Page 1    **NEW**
-----
The NX Equipment Request, Transaction #: 47    621-420-96-00024
is being returned because the line item(s) requested are not
Non-Expendable.
Explanation:
REALLY SHOULD BE ORDERED THROUGH SUPPLY
    
```

**4.1.3 Step 3**

A request determined to be non-expendable is sent on to Engineering for their review and approval. See Chapter 5 for information that Engineering will provide for a request.

```

Select EQUIPMENT REQUEST TRANSACTION NUMBER: ? <RET>
Choose from:
    621-780-96-00005    Pending PPM Review
    621-781-96-P00002    Pending PPM Review

Select EQUIPMENT REQUEST TRANSACTION NUMBER: 621-780-96-00005 <RET>    Pending PPM Review

Do you want to view the information related to this request? Yes// <RET>

Is this NX Equipment?: ? <RET>
Enter 'Yes' if this equipment is considered to be non-expendable equipment.
Choose from:
    Y      YES
    N      NO
Is this NX Equipment? Y <RET>    YES

Transaction sent to Engineering for Review
    
```

#### 4.1.4 Step 4

After Engineering has reviewed and process the request, the request is returned to the PPM for further processing.

```
Select Equipment Request Menu (PPM) Option: REV <RET> iew Equipment Requests (PPM)
Select EQUIPMENT REQUEST TRANSACTION NUMBER: ?? <RET>

Choose from:
  82          621-666-96-00002      Engineering Review Completed
  83          621-666-96-00007      Engineering Review Completed
  89          621-136-96-00010      Pending PPM Review

Select EQUIPMENT REQUEST TRANSACTION NUMBER: 82 <RET> 621-666-96-00002      Engineering Review
Completed

Do you want to view the information related to this request? Yes// <RET> (Yes)
DEVICE: HOME// <RET>
```

#### 4.1.5 Step 5

The PPM determines if there are any other persons who should review and give their approval for the items in a request. If no further review is needed, the request will go to be prepared for the Equipment Committee's review.

```
CONCURRENCE NEEDED?: ?? <RET>
  Enter 'Yes' if you feel other persons need to review and approve this
  equipment request.
  Choose from:
    Y          YES
    N          NO
CONCURRENCE NEEDED?: N <RET> (NO)
CONTROLLED ITEM?: N <RET> (NO)

Transaction sent to be reviewed and ranked for Equipment Committee
```

#### 4.1.6 Step 6

Select any person already in the Concurring Official File or select a new person from the New Person file (200). Also enter the date by which the Concurring Official(s) should either approve or disapprove the request. This date will appear on the mail message. See Chapter 6 for Concurring Official processing steps.

```

CONCURRENCE NEEDED?: Y <RET> (Yes)
Select CONCURRING OFFICIALS: ? <RET>
Answer with CONCURRING OFFICIALS
    You may enter a new CONCURRING OFFICIALS, if you wish
    Select the person(s) you wish to review and approve this request.
Answer with CONCURRING OFFICIALS NAME:
    BORST,SCOTT      ASSISTANT SURGERY CHIEF

Select CONCURRING OFFICIALS: BORST,SCOTT <RET>
    ...OK? Yes// <RET> (Yes)
    ASSISTANT SURGERY CHIEF
Are you adding 'BORST,SCOTT' as a new CONCURRING OFFICIALS (the 1ST for this EQUIPMENT
REQUEST)? Y <RET> (Yes)
DATE CONCURRENCE NEEDED BY: T+30 <RET> (APR 12, 1996)
Select CONCURRING OFFICIALS: JONES,TOM <RET>
    Are you adding 'JONES,TOM' as a new CONCURRING OFFICIALS (the 2nd)? Y <RET> (Yes)
CONCURRING OFFICIALS TITLE: Chief, A&MMS <RET>
Are you adding 'JONES,TOM' as a new CONCURRING OFFICIALS (the 2ND for this EQUIPMENT
REQUEST)? Y <RET> (Yes)
DATE CONCURRENCE NEEDED BY: T+30 <RET> (Apr 12, 1996)
Select CONCURRING OFFICIALS: <RET>

Transaction sent to Concurring Officials for review

```

#### 4.1.7 Step 7

If multiple concurring officials were assigned to review the request and opinions do not coincide, then the request will be approved if 50% or more approve or will disapprove if 50% or more do not approve the request.

```

Subj: CONCURRENCE NOT APPROVED [#81] 18 Mar 96 15:42 3 Lines
From: KERWIN,LANCE in 'IN' basket. Page 1 **NEW**
-----
Equipment Request, Transaction #: 621-136-96-00012 did not pass the
concurrence process. Fifty percent or more of the concurring
officials did not approve this request.

Select MESSAGE Action: IGNORE (in IN basket)// <RET> Ignored

```

#### 4.1.8 Step 8

When concurrence is finished and the request is approved it will be returned to PPM to determine if an item can be designated as a controlled item. After answering that question, requests which are not Initial (associated with a project) will go directly to the Equipment Committee for approval. All other requests will go to be reviewed and ranked for the Equipment Committee.

```

Good afternoon GEORGE You last signed on today at 12:59 P.M.

There is 1 equipment request Pending PPM Review.
There are 2 equipment requests Concurrence Completed
There are 5 equipment requests Ready for 2237 Processing.

Select EQUIPMENT REQUEST TRANSACTION NUMBER: ?? <RET>

Choose from:
  83          621-666-96-00007      Concurrence Completed
  89          621-136-96-00010      Pending PPM Review

Select EQUIPMENT REQUEST TRANSACTION NUMBER: 83 <RET> 621-666-96-00007      Concurrence
Completed

Do you want to view the information related to this request? Yes// <RET> (Yes)
DEVICE: HOME// <RET>

TRANSACTION NUMBER: 621-666-96-00007      REQUESTOR: QUE,SUZIE
REQUESTING SERVICE: INFO RESOURCES MGMT
REQUEST DATE/TIME: FEB 01, 1996@15:02:20 STATION NUMBER: 621
CMR RESPONSIBLE OFFICIAL: JACKSON,ANNE
REQUEST STATUS: Concurrence Completed
STATUS DATE: MAR 14, 1996
PROJECT NUMBER:
REQUESTOR PHONE:
SORT:
LINE ITEM:
  LINE ITEM NUMBER: 1
  DESCRIPTION:
    FAX MACHINE - CANON
  POTENTIAL VENDOR: CANON CORP
  POTENTIAL VENDOR PTR:
  UNIT COST: 550.00
  TOTAL COST: 550.00
  ITEM STATUS:
  REQUEST TYPE: ADDITIONAL
  TURN-IN REQUEST:
  DATE REQUIRED BY: MAY 01, 1996
  CLASSIFICATION:
  VENDOR PRODUCT #:
  QUANTITY REQUIRED: 1
  CONTRACT #:
  CSN:

JUSTIFICATION:
  NEED A FAX MACHINE FOR IRM
CHANGE IN PERSONNEL: NO
CHANGE IN RECURRING COSTS: INCREASE
ANNUAL RECURRING SUPPLY COST: 80.00
EST. TRAINING COST:
MAINT. CONTRACT COST: 100.00
LOCATION: COMPUTER
UTILITIES REQUIRED:
  Electricity>208V
  Other
OTHER UTILITIES: PHONE LINE
SERVICE CONTACT:
CHANGE IN PERSONNEL EXPLAIN:
DEFICIENCY EXPLANATION:
CHANGE RECUR COST EXPLAIN:
  NEED FAX PAPER,TONER
TRAINING EXPLANATION:
MAINT. CONTRACT JUSTIFICATION:
  NEED TO KEEP MACHINE IN RUNNING ORDER
CMR OFFICIAL APPROVAL: YES
CMR PRIORITY: 1
JCAHO,CAP,SAFETY DEFICIENCY: NO
SUFFICIENT FUNDS BUDGETED?: YES
TRAINING NEEDED?: NO
MAINT. CONTRACT RECOMMENDED: YES
SPACE AVAILABLE?: YES
INSTALLATION NEEDED?: YES

Press RETURN to continue, or '^' to exit. <RET>

NX EQUIPMENT?: YES
ENG. TRAINING TUITION:
ENG. TRAINING VENDOR:
ENG. TRAINING LOCATION:
CONSTRUCTION/RENOVATION: NO
ENG. PROJECT #:
CONSTRUCTION/RENOVATION TIME:
SPECIAL INSTALLATION COST: 80.00
ADDITIONAL TEST EQUIP. COST:
ENGINEERING CONTACT: NAISMITH,JOE
TOTAL ENGINEERING EST. COST: 80
ENG. MAINT. CONTRACT TYPE: PM
SETS MAINTENANCE MANUALS: 2
ENG. MAINTENANCE TRAINING: NO
ENG. TRAINING TRAVEL COST:
PROJECT NEEDED?:
CONSTRUCTION/RENOVATION COST:
SPECIAL INSTALLATION: YES
ADDITIONAL TEST EQUIP.: NO
MAINTENANCE IMPACT COST:
ENGINEERING CONTACT PHONE:
ENG. MAINTENANCE CONTRACT: YES
ENG. MAINT. OTHER CONTRACT:

```

```
CONSTRUCT/RENOV DESCRIPTION:  
SPECIAL INSTALL DESCRIPTION:  
    CALL PHONE COMPANY TO COME AND INSTALL NEW PHONE LINE  
ADDITIONAL TEST EQUIP EXPLAIN:  
ENG. REMARKS:  
CONCURRENCE NEEDED?: YES  
CONCURRING OFFICIALS:  
    NAME: BORST,SCOTT                                TITLE: ASSISTANT SURGERY CHIEF  
  
Press RETURN to continue, or '^' to exit. <RET>  
  
    APPROVAL: YES                                    APPROVAL DATE: MAR 13, 1996  
    COMMENTS:  
        WE DEFINITELY NEED THIS.  
  
CONTROLLED ITEM?: NO// <RET>    (NO)  
  
Transaction sent to be reviewed and ranked for Equipment Committee
```

## 4.2 Edit Equipment Request (PPM)

The Personl Property Manager may select a request to edit but may not editing any Engineering data. The request must be sent back if editing is needed.

```

Select Equipment Request Menu (PPM) Option: EDIT <RET> Equipment Requests (PPM)
Select EQUIPMENT REQUEST TRANSACTION NUMBER: ?? <RET>
Choose from:
  78          621-123-96-00002      Pending Equipment Committee Approval
  82          621-666-96-00002      Pending Equipment Committee Review/Rank
  83          621-666-96-00007      Pending Equipment Committee Review/Rank
  89          621-136-96-00010      Pending PPM Review
Select EQUIPMENT REQUEST TRANSACTION NUMBER: 621-666-96-00007 <RET> Pending Equipment Committee
Review/Rank

Do you want to view the information related to this request? Yes// N <RET> (NO)
Do you want to edit this request? No// Y <RET> (Yes)
DATE REQUIRED BY: MAY 1,1996// <RET>
SORT: <RET>
CLASSIFICATION: <RET>
Select LINE ITEM NUMBER: 1// <RET>
  LINE ITEM NUMBER: 1// <RET>
  DESCRIPTION:
  1>FAX MACHINE - CANON <RET>
  2> <RET>
EDIT Option: <RET>
  POTENTIAL VENDOR: CANON CORP// <RET>
  VENDOR PRODUCT #: <RET>
  UNIT COST: 550.00// <RET>
  QUANTITY REQUIRED: 1// <RET>
  CONTRACT #: <RET>
  PARENT SYSTEM / COMPONENT: PARENT SYSTEM// <RET>
Select LINE ITEM NUMBER: <RET>
JUSTIFICATION:
  1>NEED A FAX MACHINE FOR IRM <RET>
  2> <RET>
EDIT Option: <RET>
CHANGE IN PERSONNEL: NO// <RET>
JCAHO,CAP,SAFETY DEFICIENCY: NO// <RET>
CHANGE IN RECURRING COSTS: INCREASE// <RET>
SUFFICIENT FUNDS BUDGETED?: YES// <RET>
CHANGE RECUR COST EXPLAIN:
  1>NEED FAX PAPER,TONER <RET>
  2> <RET>
EDIT Option: <RET>
ANNUAL RECURRING SUPPLY COST: 80.00// <RET>
TRAINING NEEDED?: NO// <RET>
MAINT. CONTRACT RECOMMENDED: YES// <RET>
MAINT. CONTRACT JUSTIFICATION:
  1>NEED TO KEEP MACHINE IN RUNNING ORDER <RET>
  2> <RET>
EDIT Option: <RET>
MAINT. CONTRACT COST: 100.00// <RET>
SPACE AVAILABLE?: YES// <RET>
LOCATION: COMPUTER// <RET>          1      B      INFO RESOURCES MGMT      COMPUTER ROOM
INSTALLATION NEEDED?: YES// <RET>
Select UTILITIES REQUIRED: <RET>
  UTILITIES REQUIRED: Electricity>208V// <RET>
Select UTILITIES REQUIRED: <RET>
OTHER UTILITIES: PHONE LINE// <RET>
SERVICE CONTACT: <RET>
SERVICE CONTACT PHONE: <RET>

Resend to Engineering for Editing? No// <RET> (No)

```

### 4.3 Cancel Equipment Request (PPM)

The PPM may select to cancel a request.

```

Enter TRANSACTION #: 57 <RET>      621-780-95-00005B

Service: INFO RESOURCES MGMT          CMR Official: SMITH,BILL
Requestor: QUE,SUZIE                 Date entered: JUL 31, 1995
Line Items:
  1 ITEM ONE                          $    225.00

Are you sure you want to cancel this transaction? No// Y <RET>  (Yes)
REASON CANCELLED:
  1>OLD REQUEST, NO LONGER NEEDED. <RET>
  2> <RET>
EDIT Option: <RET>

Transaction #57 has been cancelled.

```

### 4.4 Rank Equipment Requests

After reviewing requests, a priority ranking should be assigned. You may select the default rank, enter a rank not yet assigned or enter a rank already in use. If you enter a rank in use, the other transactions' priorities will shift downward accordingly.

```

Select EQUIPMENT REQUEST TRANSACTION NUMBER: ?? <RET>

Choose from:
  77          621-123-96-00001      Pending Equipment Committee Review/Rank
  82          621-666-96-00002      Pending Equipment Committee Review/Rank
  83          621-666-96-00007      Pending Equipment Committee Review/Rank

Select EQUIPMENT REQUEST TRANSACTION NUMBER: 77 <RET> 621-123-96-00001 Pending Equipment
Committee Review/Rank

Do you want to view the information related to this request? Yes// N <RET>  (No)
EQUIPMENT COMMITTEE RANKING: 16// ? <RET>
  Enter the Equipment Committee ranking for this request.

Ranking list:
  2          621-123-96-00002      HYDRAULIC LIFT
  4          621-781-95-00002      WATERHEATER, 100 CUB
  9          621-780-95-00008      BATHTUB/SINK
  12         621-323-95-00001      TABLE SAW
  15         621-123-96-00003      RICOH COPY MACHINE
  16         621-123-96-00001      PENTIUM 120 COMPUTER
EQUIPMENT COMMITTEE RANKING: 16// 5 <RET>

```

### 4.5 Create 2237 (PPM)

#### 4.5.1 Step 1

In order to create a new 2237 from a equipment request, you must be a valid control point. Review the Control Point Official and Control Point Clerk user manuals on how to become a valid control point. As much information as possible will be moved from the equipment request into the 2237 and will appear as defaults. You can accept these defaults or change them as necessary.

```

Select EQUIPMENT REQUEST TRANSACTION NUMBER: 50 <RET> 621-420-96-00029 Ready for 2237
Processing
Select FISCAL YEAR: 96// <RET>
Select QUARTER: 2// <RET>
Select CONTROL POINT: 5984 <RET> 5984 FACILITY EQUIPMENT
Enter a year in the following sequence of years.
...1989 1991 1993 1995 1997 1999 2001 ...
First Year of the Multi-Appropriation (36_/_0160): 1995// <RET>

This transaction is assigned transaction number: 621-96-2-5984-0039
FORM TYPE: REPE <RET> ITIVE AND NON-REP ORDER
SPECIAL REMARKS:
  1> <RET>
EDIT Option: <RET>
COST CENTER: 844100 <RET> Supply

Line Item #1:
Description:
  FAX MACHINE

BOC: 3121 <RET> Office Equipment
STOCK NUMBER: <RET>
  Enter the Federal Supply Service (FSS) or other stock number for this
  item, or the manufacturers model number
INTERMEDIATE PRODUCT CODE: <RET>
  QTY BEG BAL: 1

Select DELIVERY SCHEDULE: <RET>
VENDOR: RICOH// <RET>
VENDOR PTR : <RET>
VENDOR ADDRESS1: 111 BAKER STREET// <RET>
VENDOR ADDRESS2: <RET>
VENDOR ADDRESS3: <RET>
VENDOR ADDRESS4: <RET>
VENDOR CITY: JOHNSON CITY// <RET>
VENDOR STATE: TN <RET> TENNESSEE
VENDOR ZIP CODE: 12323 <RET>
VENDOR CONTACT: <RET>
VENDOR PHONE NO.: <RET>
VENDOR CONTRACT NUMBER: <RET>
Current Control Point balance: $105277.83
Estimated cost of this request: $2500.00
Total uncommitted balance from current and prior quarters: $404854.39

Is this request ready for approval? Yes// <RET> (Yes)
Is this request ready for transmission to A&MM/Fiscal? No// Y <RET> (Yes)
Enter ELECTRONIC SIGNATURE CODE: CODE <RET> Thank you.

```

### 4.5.2 Step 2

If a 2237 was not completed, the equipment request will retain the permanent transaction number and allow you to complete the 2237 process.

```
Select EQUIPMENT REQUEST TRANSACTION NUMBER: 12 <RET> 621-780-94-00004 Approved - Funded
Select FISCAL YEAR: 96// <RET>
Select QUARTER: 2// <RET>
FORM TYPE: NON-REPETITIVE (2237) ORDER// <RET>
TRANSACTION TYPE: OBLIGATION// <RET>
TEMPORARY TRANS. NUMBER: 621-780-94-00004// <RET>
CLASSIFICATION OF REQUEST: <RET>
SORT GROUP: <RET>
DATE OF REQUEST: NOV 27,1995// <RET>
REQUESTING SERVICE: PATIENT CARE// <RET>
DATE REQUIRED: JUL 20,1995// <RET>
PRIORITY OF REQUEST: STANDARD// <RET>
SPECIAL REMARKS:
  1>REMARKS <RET>
  2><RET>
EDIT Option: <RET>
COST CENTER: 160000 <RET> Office of Administratio Replace
Select LINE ITEM NUMBER: 1// <RET>
  DESCRIPTION:
  1>TEST ITEMS <RET>
EDIT Option: <RET>
  QUANTITY: 10// <RET>
  UNIT OF PURCHASE: EA// <RET>
  BOC: 3121 Office Equipment Replace <RET>
Select LINE ITEM NUMBER: <RET>
VENDOR: JONES INC.// <RET>
Current Control Point balance: $999000.00
Estimated cost of this request: $500.00
Total uncommitted balance from current and prior quarters: $999000.00

Is this request ready for approval? Yes// <RET> (Yes)
Is this request ready for transmission to A&MM/Fiscal? No// Y <RET> (Yes)
Enter ELECTRONIC SIGNATURE CODE: CODE <RET> Thank you.
QUEUE ON DEVICE: <RET>
```

### 4.6 Display/Print Equipment Request

Use this menu option to print a request to a print or to the screen.

```
Select EQUIPMENT REQUEST TRANSACTION NUMBER: ?? <RET>
Choose from:

  83          621-666-96-00007      Pending Equipment Committee Review/Rank
  84          621-420-96-00001      Approved - Funded
  89          621-136-96-00010      Pending PPM Review
  92          621-136-96-00011      Pending Engineering Signature
Select EQUIPMENT REQUEST TRANSACTION NUMBER: 83 <RET> 621-666-96-00007 Pending Equipment
Committee Review/Rank

Do you want to view the information related to this request? Yes// <RET> (Yes)
DEVICE: <RET>
```

This print can be queued.

```

TRANSACTION NUMBER: 621-666-96-00007    REQUESTOR: QUE,SUZIE
REQUESTING SERVICE: INFO RESOURCES MGMT
REQUEST DATE/TIME: FEB 01, 1996@15:02:20 STATION NUMBER: 621
CMR RESPONSIBLE OFFICIAL: JACKSON,ANNE
REQUEST STATUS: Pending Equipment Committee Review/Rank
STATUS DATE: MAR 14, 1996                REQUEST TYPE: ADDITIONAL
PROJECT NUMBER:                          TURN-IN REQUEST:
REQUESTOR PHONE:                         DATE REQUIRED BY: MAY 01, 1996
SORT:                                     CLASSIFICATION:
LINE ITEM:
  LINE ITEM NUMBER: 1
  DESCRIPTION:
    FAX MACHINE - CANON
  POTENTIAL VENDOR: CANON CORP
  POTENTIAL VENDOR PTR:
  UNIT COST: 550.00                      VENDOR PRODUCT #:
  TOTAL COST: 550.00                    QUANTITY REQUIRED: 1
  ITEM STATUS:                          CONTRACT #:
                                         CSN:
JUSTIFICATION:
  NEED A FAX MACHINE FOR IRM
CHANGE IN PERSONNEL: NO                  JCAHO,CAP,SAFETY DEFICIENCY: NO
CHANGE IN RECURRING COSTS: INCREASE    SUFFICIENT FUNDS BUDGETED?: YES
ANNUAL RECURRING SUPPLY COST: 80.00    TRAINING NEEDED?: NO
EST. TRAINING COST:                     MAINT. CONTRACT RECOMMENDED: YES
MAINT. CONTRACT COST: 100.00           SPACE AVAILABLE?: YES
LOCATION: COMPUTER                       INSTALLATION NEEDED?: YES
UTILITIES REQUIRED:
  Electricity>208V
  Other
OTHER UTILITIES: PHONE LINE
SERVICE CONTACT:                       SERVICE CONTACT PHONE:
CHANGE IN PERSONNEL EXPLAIN:
DEFICIENCY EXPLANATION:
CHANGE RECUR COST EXPLAIN:
  NEED FAX PAPER,TONER
TRAINING EXPLANATION:
MAINT. CONTRACT JUSTIFICATION:
  NEED TO KEEP MACHINE IN RUNNING ORDER
CMR OFFICIAL APPROVAL: YES              CMR PRIORITY: 1
NX EQUIPMENT?: YES                     ENG. MAINTENANCE TRAINING: NO
ENG. TRAINING TUITION:                 ENG. TRAINING TRAVEL COST:
ENG. TRAINING VENDOR:
ENG. TRAINING LOCATION:
CONSTRUCTION/RENOVATION: NO            PROJECT NEEDED?:
ENG. PROJECT #:                        CONSTRUCTION/RENOVATION COST:
CONSTRUCTION/RENOVATION TIME:          SPECIAL INSTALLATION: YES
SPECIAL INSTALLATION COST: 80.00       ADDITIONAL TEST EQUIP.: NO
ADDITIONAL TEST EQUIP. COST:           MAINTENANCE IMPACT COST:
ENGINEERING CONTACT: NAISMITH,JOE      ENGINEERING CONTACT PHONE:
TOTAL ENGINEERING EST. COST: 80        ENG. MAINTENANCE CONTRACT: YES
ENG. MAINT. CONTRACT TYPE: PM          ENG. MAINT. OTHER CONTRACT:
SETS MAINTENANCE MANUALS: 2
CONSTRUCT/RENOV DESCRIPTION:
SPECIAL INSTALL DESCRIPTION:
  CALL PHONE COMPANY TO COME AND INSTALL NEW PHONE LINE
ADDITIONAL TEST EQUIP EXPLAIN:
ENG. REMARKS:
CONCURRENCE NEEDED?: NO
EQUIPMENT COMMITTEE RANKING:           CONTROLLED ITEM?: NO
SHORT DESCRIPTION:

```

## 4.7 Equipment Request Reports Menu

This menu option allows for PPM to print certain specialized reports.

### 4.7.1 Controlled Equipment Report

PPM

The Controlled Equipment Report prints transactions that have controlled items.

#### 4.7.2 Request Status Report

The Request Status Report prints the status of all transactions for the PPM.

Equipment Request Status Report by PPM: WASHER,GEORGE					
Transaction #	Status		Date Entered	Status Date	
621-123-96-00001	Pending Equipment Committee Approval		11/07/95	03/14/96	
621-123-96-00002	Pending Equipment Committee Approval		11/07/95	01/25/96	
621-123-96-00003	Pending Equipment Committee Approval		11/07/95	02/27/96	
621-123-96-00004	Approved - Funded		11/22/95	03/07/96	
621-123-96-00005	Returned by PPM		11/22/95	03/13/96	
621-136-96-00010	Pending PPM Review		03/07/96	03/07/96	
621-136-96-00011	Pending Engineering Signature		03/13/96	03/13/96	
621-420-96-00001	Approved - Funded		02/27/96	02/27/96	
621-423-94-00003	2237 Created		12/08/93	02/14/96	
621-423-94-P00001	2237 Created		12/08/93	08/07/95	
621-666-96-00002	Pending Equipment Committee Review/Ra		01/23/96	03/13/96	
621-666-96-00007	Pending Equipment Committee Review/Ra		02/01/96	03/14/96	
621-780-94-00011	2237 Created		05/18/94	02/14/96	
621-782-95-00003C	Disapproved - Do Not Resubmit		07/25/95	07/27/95	
621-782-95-00003D	Pending Equipment Committee Approval		07/25/95	08/04/95	

#### 4.7.3 Turn-In Status by CMR

This report prints in CMR order.

START WITH CMR: FIRST// <RET>					
DEVICE: <RET>					
TURN IN REPORT BY CMR			MAR 19,1996	14:13	PAGE 1
TRANSACTION #	SERVICE	CMR OFFICIAL			
EE #	EQUIPMENT NAME				
-----					
CMR: 136					
621-136-96-00002	ENG	JACKSON, ANNE			
51	HYDRAULIC LIFT BED				
CMR: 323					
621-323-95-00003	IRM	SMITH, BILL			
61	REFRIGERATOR, FOOD (23 cubft)				
CMR: 666					
621-666-94-00013	IRM	JACKSON, ANNE			
37	XEROX				
621-666-96-00006	IRM	JACKSON, ANNE			
65	PENTIUM 60				
CMR: 780					
621-780-94-00012	PTC	SMITH, BILL			
3	BLOOD CHEMICAL ANALYZER				
30	HONEYWELL CONTROL MONITOR				
621-780-95-00007	PTC	SMITH, BILL			
9	BATHTUB WHIRLPOOL UNIT				

#### 4.7.4 Turn-In Status by Service

This report prints in Service order.

```

START WITH REQUESTING SERVICE: FIRST// <RET>
DEVICE: <RET>
TURN-IN REPORT BY SERVICE                MAR 19,1996  14:13    PAGE 1
TRANSACTION #      SERVICE      CMR OFFICIAL
EE #              EQUIPMENT NAME
-----
      REQUESTING SERVICE: ENGINEERING
621-136-96-00002  ENG          JACKSON, ANNE
      51          HYDRAULIC LIFT BED
      REQUESTING SERVICE: INFO RESOURCES MGMT
621-666-94-00013  IRM          JACKSON, ANNE
      37          XEROX
      REQUESTING SERVICE: PATIENT CARE
621-780-94-00012  PTC          SMITH, BILL
      3          BLOOD CHEMICAL ANALYZER
621-780-95-00003  PTC          SMITH, BILL
      30         HONEYWELL CONTROL MONITOR
621-780-95-00007  PTC          SMITH, BILL
      9          BATHTUB WHIRLPOOL UNIT
      62         REFRIGERATOR, FOOD (23 cubft)

```

#### 4.7.5 Turn-In Status by Transaction Number

This report prints in turn-in transaction number order in the same format as 4.7.3 and 4.7.4.

#### 4.7.6 Turn-In Status Report

This report prints turn-ins by their current status.

```

TURN-IN STATUS REPORT                MAR 14,1996  15:51    PAGE 1
TRANSACTION #      SERVICE      CMR OFFICIAL
-----
      REQUEST STATUS: Cancelled Request
621-666-94-00016  IRM          JACKSON, ANNE

      REQUEST STATUS: Pending Completion by Requestor
621-136-96-00009  ENG          JACKSON, ANNE
621-420-96-00003  SRG          JUTZI, BILL

      REQUEST STATUS: Pending PPM Final Disposition
621-780-95-00012  IRM          SMITH, BILL

      REQUEST STATUS: Pending PPM Review
621-323-95-00003  IRM          SMITH, BILL
621-136-96-00002  ENG          JACKSON, ANNE

      REQUEST STATUS: Pending Warehouse Pickup
621-323-95-00002  IRM          SMITH, BILL

      REQUEST STATUS: Pending Work Order Completion

      REQUEST STATUS: Turn-in Completed
621-780-95-00003  IRM          SMITH, BILL
621-780-95-00007  IRM          SMITH, BILL

```

## 4.8 Process Turn-Ins Menu

PPM must review any turn-in requests to determine if a work order must be created in order for the equipment to be picked-up by the warehouse.

### 4.8.1 Process Turn-In Request

```

TRANSACTION CODE: 621-420-96-00016          REQUESTOR: THOMPSON,TILLIE
REQUESTING SERVICE: ACQUISITION & MATERIEL MGMT  STATION NUMBER: 621
REQUEST DATE/TIME: FEB 06, 1996@14:01:57
CMR RESPONSIBLE OFFICIAL:
REQUEST STATUS: Pending PPM Final Disposition
STATUS DATE: FEB 06, 1996                  CMR OFFICIAL APPROVAL: YES
CMR OFFICIAL EXPLANATION:

Select ITEM NUMBER: 10327// <RET>
DISPOSAL CONDITION CODE: ?? <RET>
Choose from:
1      EXCHANGE/SALE (EXCHANGED)
2      EXCHANGE/SALE (SOLD)
3      VA EXCESS TO OGA
4      VA EXCESS TO SCRAP
5      VA EXCESS ABAANDONED/DESTROYED
6      VA EXCESS SOLD BY VA
7      STATION EXCESS REASSIGNED WITHIN VA
DISPOSITION METHOD: 4 <RET>                VA EXCESS TO SCRAP
DISPOSITION VALUE: 0 <RET>
Select REPLACEMENT ITEM NUMBER: <RET>
ENTER YOUR ELECTRONIC SIGNATURE CODE: CODE <RET>    Thank you.

```

### 4.8.2 Disposition of a Turn-In Document

After Engineering has processed the work order (if one was needed), and the Warehouse has picked up the equipment, the turn-in is sent to the PPM for final disposition and processing of the item(s).

```

TRANSACTION CODE: 621-780-96-00012          REQUESTOR: THOMPSON,TILLIE
REQUESTING SERVICE: INFORMATION RESOURCE MGMT.  STATION NUMBER: 621
REQUEST DATE/TIME: MAR 16, 1996
CMR RESPONSIBLE OFFICIAL:
REQUEST STATUS: Pending PPM Final Disposition
STATUS DATE: MAR 16, 1996                  CMR OFFICIAL APPROVAL: YES
CMR OFFICIAL EXPLANATION:

Select ITEM NUMBER: 6// <RET>
DISPOSAL CONDITION CODE: Scrap// <RET>
DISPOSITION METHOD: <RET>
VOUCHER #: <RET>
PROCEED $: <RET>
DISPOSITION VALUE: <RET>
TURN-IN VALUE: <RET>

ENTER YOUR ELECTRONIC SIGNATURE CODE: CODE <RET>    Thank you.

```

# CHAPTER 5 ENGINEERING

If you have been designated the Engineering contact person to process equipment requests, you may have, as a secondary menu, the option to Approve Equipment Requests. Select this option to process requests that have been forwarded to you from the Personal Property Manager. See Chapter 4.

## 5.1 Step 1

Your main menu may look like the following:

```
There are 2 Equipment Requests to review.
Select Engineering Main Menu Option:

  WO      Work Order & MERS ...
  PLAN    Project Planning ...
  TRK     Project Tracking ...
  EQ      Equipment Management ...
  ENM     Program Management ...
  SP      Space/Facility Management ...
  FSA     2162 Report of Accident ...
  XFER    Assign (Transfer) Electronic Work Orders

Select Engineering Main Menu Option: App<RET>rove Equipment Request (Engineering)
```

## 5.2 Step 2

Select the request you wish to review. The Engineering Department when reviewing an equipment request, must fill out information that may have an impact on them.

```
There is 1 equipment request Pending Engineering Review.
Approve Equipment Request (Engineering)

Select EQUIPMENT REQUEST TRANSACTION NUMBER: ? <RET>
Answer with EQUIPMENT REQUEST NUMBER, or TRANSACTION NUMBER
Do you want the entire EQUIPMENT REQUEST List? Y <RET> (Yes)
Choose from:
  83                621-666-96-00007      Pending Engineering Review

Select EQUIPMENT REQUEST TRANSACTION NUMBER: 83<RET> 621-666-96-00007 Pending Engineering
Review

Do you want to view the information related to this request? Yes// <RET> (Yes)
DEVICE: HOME// <RET>
```

**5.3 Step 3**

Some fields that the requestor entered may be reviewed and changed by the Engineering department if needed.

```

SPACE AVAILABLE?: YES// <RET>
LOCATION: COMPUTER// <RET>          1      B      INFO RESOURCES MGMT      COMPUTER ROOM
INSTALLATION NEEDED?: NO// <RET>
  Enter 'Yes' if the Engineering Department must install equipment
  Choose from:
    Y      YES
    N      NO
INSTALLATION NEEDED?: NO// Y <RET>      YES
Select UTILITIES REQUIRED: ? <RET>
  Answer with UTILITIES REQUIRED
  Choose from:
    Electricity>208V
    Other

  You may enter a new UTILITIES REQUIRED, if you wish
  Select as many utilities that are needed for installation.
  Choose from:
    0      None
    1      Air
    2      Gas
    3      Vacuum
    4      ADP
    5      Plumbing
    6      Electricity-110V
    7      Electricity>208V
    8      Emergency Power
    9      Fire Sprinkler
    10     Exhaust
    11     A/C
    12     Steam
    13     Other
  UTILITIES REQUIRED: Electricity>208V// <RET>
Select UTILITIES REQUIRED: 13 <RET>
  UTILITIES REQUIRED: Other// <RET>
Select UTILITIES REQUIRED: <RET>
OTHER UTILITIES: PHONE LINE// <RET>
MAINT. CONTRACT RECOMMENDED: YES// <RET>
MAINT. CONTRACT JUSTIFICATION:
  1>NEED TO KEEP MACHINE IN RUNNING ORDER <RET>
EDIT Option: <RET>
MAINT. CONTRACT COST: 100.00// <RET>

```

**5.4 Step 4**

Another impact to the Engineering Department is whether anyone in there may need special training in order to maintain the requested equipment if it is acquired. If additional training is needed, other questions will need to be answered concerning tuition and travel costs associated with that training as well as the potential training vendor. When entering the training vendor, the Vendor file will be checked, or it will accept a free text vendor.

```

ENG. MAINTENANCE TRAINING: NO// ? <RET>
Enter 'Yes' if additional Engineering maintenance training is needed after
proposed equipment is purchased.
Choose from:
    Y      YES
    N      NO
ENG. MAINTENANCE TRAINING: Y <RET>    YES
ENG. TRAINING TUITION: ? <RET>
Enter the estimated amount of any Engineering training tuition.
ENG. TRAINING TUITION: 200.00 <RET>
ENG. TRAVEL COST: ? <RET>
Enter the estimated amount of travel cost for Engineering training
ENG. TRAVEL COST: 150.00 <RET>
ENG. TRAINING VENDOR: ? <RET>
Enter a vendor (up to 50 characters) that may conduct Engineering training
ENG. TRAINING VENDOR: JONES INC. <RET>    NO. 2
ORDERING ADDRESS:
ENG. TRAINING LOCATION: ? <RET>
Enter where Engineering training may take place (up to 50 characters)
ENG. TRAINING LOCATION: NEW YORK CITY <RET>

```

### 5.5 Step 5

The next question is whether any special construction/renovation is needed to accommodate the new equipment, if acquired. If you answer 'Yes', the next question will be whether a project had been submitted and approved in order to accomplish the necessary construction/renovation. The next inquiry will be for the project number. If a project has not yet been developed, this inquiry should be left blank. A description of the nature and location of the construction/renovation will be required in the next field. Enter the estimated construction/renovation cost and number of calendar days that would be required for completion of any special construction/renovation.

```

CONSTRUCTION/RENOVATION: NO// ? <RET>
  Enter 'Yes' if there is any special construction needs
  Choose from:
    Y      YES
    N      NO
CONSTRUCTION/RENOVATION: NO// Y <RET>      YES
PROJECT NEEDED?: NO// ? <RET>
  Enter 'Yes' if a Project # is needed
  Choose from:
    Y      YES
    N      NO
PROJECT NEEDED?: NO// Y <RET> YES
PROJECT NUMBER: 621-789 <RET>
CONSTRUCT/RENOV DESCRIPTION:
  1> <RET> ?? Description is required
CONSTRUCT/RENOV DESCRIPTION:
  1> need to build special holding box for item <RET>
  2><RET>
EDIT OPTION: <RET>
CONSTRUCTION/RENOVATION COST: ? <RET>
  Enter the estimated cost of new construction or renovation for this
  request.
CONSTRUCTION/RENOVATION COST: 200.00 <RET>
CONSTRUCTION/RENOVATION TIME: ? <RET>
  Enter an estimated time it would take to complete construction or
  renovation.
CONSTRUCTION/RENOVATION TIME: 2 days <RET>

```

### 5.6 Step 6

Special installation questions should only be answered if anything other than normal utility connections are needed in order for the equipment to be installed and made operational. For example, a room may be large enough to contain a large piece of equipment, but the door may have to be removed in order to move the equipment into the room, or plumbing might be required. This information will be entered in the special installation requirement word-processing field.

```

SPECIAL INSTALLATION: ? <RET>
  Enter 'Yes' if work other than normal utility connection is
  needed to install equipment
SPECIAL INSTALLATION: Y <RET>      YES
SPECIAL INSTALL DESCRIPTION:
  1> <RET> ?? Description is required
SPECIAL INSTALL DESCRIPTION:
  1> Need to remove door in order to move equipment<RET>
  2> into room. <RET>
  3><RET>
EDIT OPTION: <RET>
SPECIAL INSTALLATION COST: ? <RET>
  Enter the estimated cost of the special installation
SPECIAL INSTALLATION COST: 399.00 <RET>

```

### 5.7 Step 7

If additional test equipment is needed to maintain the requested equipment in operational order, then the additional test equipment field must be answered 'Yes'.

```

ADDITIONAL TEST EQUIP.: ? <RET>
  Answer 'Y' if any additional equipment is needed to test or calibrate the
  new equipment.
  Choose from:
      Y      YES
      N      NO
ADDITIONAL TEST EQUIP.: Y <RET>      YES
ADDITIONAL TEST EQUIP EXPLAIN:
  1> <RET> ?? Explanation is required
ADDITIONAL TEST EQUIP EXPLAIN:
  1> A new ohm reader is needed to keep this <RET>
  2> equipment in shape. <RET>
  3><RET>
EDIT OPTION: <RET>
ADDITIONAL TEST EQUIP COST: ? <RET>
  Enter an estimated cost for any additional test equipment
ADDITIONAL TEST EQUIP COST: 80.00 <RET>

```

### 5.8 Step 8

If there is another person who should be the Engineering contact for this request, enter it at this point.

```
ENGINEERING CONTACT:
```

### 5.9 Step 9

Whether Engineering desires a maintenance contract will be the next question that must be answered. Engineering desires to have at least a minimum of two sets of maintenance manuals on hand. Be sure to enter any estimated impact cost on the maintenance of the items in the request. This will be especially important to the Equipment Committee in their consideration of the request.

```

ENG. MAINTENANCE CONTRACT: YES// ? <RET>
  Enter 'Yes' if Engineering has made the determination of importance of
  having a maintenance contract.
ENG. MAINTENANCE CONTRACT: YES// <RET>
ENG. MAINT. CONTRACT TYPE: ? <RET>
  Select the appropriate type of maintenance contract for Engineering
  Choose from:
      1 Full Maintenance
      2 PM
      3 Parts Only
      4 Screening Contract
      5 Other
ENG. MAINT. CONTRACT TYPE: 5 <RET>      Other

SETS MAINTENANCE MANUALS: 2// ? <RET>
  Enter the minimum sets of maintenance manuals to keep on hand (2-10)
SETS MAINTENANCE MANUALS: 2// <RET>
MAINTENANCE IMPACT COST: ? <RET>
  Enter an estimated amount that the purchase of this equipment may impact
  on maintenance
MAINTENANCE IMPACT COST: 100.00 <RET>

```

Engineering

### 5.10 Step 10

A general remarks field has been added for Engineering to make any comments not otherwise covered.

ENG. REMARKS:

1><RET>

ENTER YOUR ELECTRONIC SIGNATURE CODE:      CODE <RET>      Thank you

Transaction returned to PPM

**5.11 Step 11**

Displaying a request for the Engineering user.

```

Do you want to view the information related to this request? Yes// <RET> (Yes)
DEVICE: HOME// <RET>

TRANSACTION NUMBER: 621-666-96-00007      REQUESTOR: QUE,SUZIE
REQUESTING SERVICE: INFO RESOURCES MGMT
REQUEST DATE/TIME: FEB 01, 1996@15:02:20  STATION NUMBER: 621
CMR RESPONSIBLE OFFICIAL: JACKSON,ANNE
REQUEST STATUS: Pending Engineering Review
STATUS DATE: MAR 13, 1996                 REQUEST TYPE: ADDITIONAL
PROJECT NUMBER:                            TURN-IN REQUEST:
REQUESTOR PHONE:                          DATE REQUIRED BY: MAY 01, 1996
SORT:                                       CLASSIFICATION:
LINE ITEM:
  LINE ITEM NUMBER: 1
  DESCRIPTION:
    FAX MACHINE - CANON
  POTENTIAL VENDOR: CANON CORP
  POTENTIAL VENDOR PTR:                   VENDOR PRODUCT #:
  UNIT COST: 550.00                       QUANTITY REQUIRED: 1
  TOTAL COST: 550.00                     CONTRACT #:
  ITEM STATUS:                            CSN:

JUSTIFICATION:

Press RETURN to continue, or '^' to exit. <RET>

  NEED A FAX MACHINE FOR IRM
CHANGE IN PERSONNEL: NO                   JCAHO,CAP,SAFETY DEFICIENCY: NO
CHANGE IN RECURRING COSTS: INCREASE     SUFFICIENT FUNDS BUDGETED?: YES
ANNUAL RECURRING SUPPLY COST: 80.00    TRAINING NEEDED?: NO
EST. TRAINING COST:                      MAINT. CONTRACT RECOMMENDED: YES
MAINT. CONTRACT COST: 100.00             SPACE AVAILABLE?: YES
LOCATION: COMPUTER                         INSTALLATION NEEDED?: YES
UTILITIES REQUIRED:
  Electricity>208V
  Other
OTHER UTILITIES: PHONE LINE
SERVICE CONTACT:                        SERVICE CONTACT PHONE:
CHANGE IN PERSONNEL EXPLAIN:
DEFICIENCY EXPLANATION:
CHANGE RECUR COST EXPLAIN:
  NEED FAX PAPER,TONER
TRAINING EXPLANATION:
MAINT. CONTRACT JUSTIFICATION:
  NEED TO KEEP MACHINE IN RUNNING ORDER
CMR OFFICIAL APPROVAL: YES                CMR PRIORITY: 1

Press RETURN to continue, or '^' to exit. <RET>
NX EQUIPMENT?: YES

```



# CHAPTER 6 OTHER CONCURRING OFFICIALS

## 6.1 Step 1

If you are assigned to be a Concurring Official, you will receive the following mail message from the Personal Property Manager.

```
Subj: CONCURRENCE NEEDED [#32234]      04 AUG 96 17:25      3 Lines
From: WASHER,GEORGE      in 'IN' basket.      Page 1      **NEW**
```

```
-----
You were selected to review NX Equipment Request,
Transaction #: 621-666-96-00007 for your concurring
opinion. Please review and indicate your approval or
not by AUG 16, 1996.
```

## 6.2 Step 2

All designated concurring officials should be assigned the appropriate menu option in order to process requests sent to them.

```
There is 1 equipment request Pending Concurrence.
```

```
Select EQUIPMENT REQUEST TRANSACTION NUMBER: ? <RET>
Answer with EQUIPMENT REQUEST NUMBER, or TRANSACTION NUMBER
Do you want the entire EQUIPMENT REQUEST List? Y <RET> (Yes)
Choose from:
```

```
83          621-666-96-00007      Pending Concurrence
```

```
Select EQUIPMENT REQUEST TRANSACTION NUMBER: 83 <RET> 621-666-96-00007      Pending Concurrence
```

## 6.3 Step 3

They may review the request prior to indicating their decision either to the screen or printer.

```
Do you want to view the information related to this request?: Yes// <RET>
DEVICE: HOME// <RET>
```

## Other Concurring Officials

```
TRANSACTION NUMBER: 621-666-96-00007      REQUESTOR: QUE,SUZIE
REQUESTING SERVICE: INFO RESOURCES MGMT
REQUEST DATE/TIME: FEB 01, 1996@15:02:20  STATION NUMBER: 621
CMR RESPONSIBLE OFFICIAL: JACKSON,ANNE
REQUEST STATUS: Pending Concurrence
STATUS DATE: MAR 13, 1996                  REQUEST TYPE: ADDITIONAL
PROJECT NUMBER:                             TURN-IN REQUEST:
REQUESTOR PHONE:                            DATE REQUIRED BY: MAY 01, 1996
SORT:                                       CLASSIFICATION:
LINE ITEM:
  LINE ITEM NUMBER: 1
  DESCRIPTION:
    FAX MACHINE - CANON
  POTENTIAL VENDOR: CANON CORP
  POTENTIAL VENDOR PTR:                    VENDOR PRODUCT #:
  UNIT COST: 550.00                       QUANTITY REQUIRED: 1
  TOTAL COST: 550.00                     CONTRACT #:
  ITEM STATUS:                            CSN:

JUSTIFICATION:

Press RETURN to continue, or '^' to exit. <RET>

  NEED A FAX MACHINE FOR IRM
CHANGE IN PERSONNEL: NO                    JCAHO,CAP,SAFETY DEFICIENCY: NO
CHANGE IN RECURRING COSTS: INCREASE      SUFFICIENT FUNDS BUDGETED?: YES
ANNUAL RECURRING SUPPLY COST: 80.00     TRAINING NEEDED?: NO
EST. TRAINING COST:                       MAINT. CONTRACT RECOMMENDED: YES
MAINT. CONTRACT COST: 100.00             SPACE AVAILABLE?: YES
LOCATION: COMPUTER                         INSTALLATION NEEDED?: YES
UTILITIES REQUIRED:
  Electricity>208V
  Other
OTHER UTILITIES: PHONE LINE
SERVICE CONTACT:                         SERVICE CONTACT PHONE:
CHANGE IN PERSONNEL EXPLAIN:
DEFICIENCY EXPLANATION:
CHANGE RECUR COST EXPLAIN:
  NEED FAX PAPER,TONER
TRAINING EXPLANATION:
MAINT. CONTRACT JUSTIFICATION:
  NEED TO KEEP MACHINE IN RUNNING ORDER
CMR OFFICIAL APPROVAL: YES               CMR PRIORITY: 1

Press RETURN to continue, or '^' to exit. <RET>

NX EQUIPMENT?: YES                       ENG. MAINTENANCE TRAINING: NO
ENG. TRAINING TUITION:                   ENG. TRAINING TRAVEL COST:
ENG. TRAINING VENDOR:
ENG. TRAINING LOCATION:
CONSTRUCTION/RENOVATION: NO              PROJECT NEEDED?:
ENG. PROJECT #:                          CONSTRUCTION/RENOVATION COST:
CONSTRUCTION/RENOVATION TIME:             SPECIAL INSTALLATION: YES
SPECIAL INSTALLATION COST: 80.00         ADDITIONAL TEST EQUIP.: NO
ADDITIONAL TEST EQUIP. COST:             MAINTENANCE IMPACT COST:
ENGINEERING CONTACT: NAISMITH,JOE        ENGINEERING CONTACT PHONE:
TOTAL ENGINEERING EST. COST: 80         ENG. MAINTENANCE CONTRACT: YES
ENG. MAINT. CONTRACT TYPE: PM           ENG. MAINT. OTHER CONTRACT:
SETS MAINTENANCE MANUALS: 2
CONSTRUCT/RENOV DESCRIPTION:
SPECIAL INSTALL DESCRIPTION:
  CALL PHONE COMPANY TO COME AND INSTALL NEW PHONE LINE
ADDITIONAL TEST EQUIP EXPLAIN:
ENG. REMARKS:
```

### 6.3 Step 3

#### Approving the request.

Do you approve this Equipment Request?: Y <RET> (YES)
COMMENTS:
1>NO PARTICULAR COMMENTS <RET>
2><RET>
EDIT Option: <RET>
ENTER YOUR ELECTRONIC SIGNATURE CODE: CODE <RET> Thank you.
Transaction will be returned to PPM for final review

## Other Concurring Officials

# CHAPTER 7 EQUIPMENT COMMITTEE

If you are responsible for processing the Equipment Committee's decisions, you may have the Equipment Committee menu assigned.

There are 10 equipment requests Pending Equipment Committee Approval.

Rank Equipment Requests  
 Equipment Request Summary Report  
 Outstanding Equipment Requests Report  
 Process Equip Committee Decisions  
 Service Priority Report

Select Equipment Committee Menu Option:

## 7.1 Rank Equipment Requests

This option may be assigned to the Personal Property Manager (PPM) or be done at the Equipment Committee Level. Please review section 4.4 for information on how to do this option.

## 7.2 Equipment Request Cost Summary Report

This report (which must be run as a 132 Column report) will help the Equipment Committee in reviewing and approving requests. It provides a summary of all costs entered during the equipment request process.

EQUIPMENT REQUEST COST SUMMARY REPORT											Mar 14, 1996 7:47 pm PAGE: 1
		Annual	Training	Contract	Tuition	Travel	Renov.	Install	Equip	Impact	Total
Transaction #	Line Item	Recurring Cost	Cost	Cost	Cost	Cost	Cost	Cost	Cost	Cost	Cost
Service: DIETETICS											
621-123-96-00003	100.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	100.00
Subtotal for DIETETICS:											100.00
Service: INFO RESOURCES MGMT											
621-782-95-00003B	125.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	125.00
621-782-95-00003D	215.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	215.00
621-781-95-00001B	1000.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	1000.00
621-780-95-00008	2250.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	2250.00
621-323-95-00001	6000.00	0.00	0.00	200.00	0.00	0.00	0.00	0.00	0.00	0.00	6200.00
621-123-96-00001	200.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	200.00
621-666-96-00002	1000.00	0.00	0.00	0.00	0.00	0.00	0.00	300.00	0.00	0.00	1300.00
621-666-96-00007	550.00	80.00	0.00	100.00	0.00	0.00	0.00	80.00	0.00	0.00	810.00
Subtotal for INFO RESOURCES MGMT:											12100.00
Total:											12200.00

### 7.3 Outstanding Equipment Requests Report

This report is an informational report for the Equipment Committee. It prints requests that are currently in the Equipment Committee's review process. It will display the Parent System line items and other general information about the request.

Requests by Service Priority		MAR 14,1996 19:47		PAGE 1	
TRANSACTION #	PRIORITY	TYPE	COST	QUANTITY	TOTAL
ITEM DESCRIPTION		PARENT SYSTEM / COMPONENT JUSTIFICATION			
-----					
621-323-95-00001	1	REPL	3000.00	2	6000.00
DIETETICS REFRIGERATOR		PARENT SYSTEM NEED NEW ONE			
621-666-96-00007	1	ADDI	550.00	1	550.00
INFO RESOURCES MGMT FAX MACHINE - CANON		PARENT SYSTEM NEED A FAX MACHINE FOR IRM			

### 7.4 Process Equip Committee Decisions

This menu should be used after priority ranking has been applied to requests and is used to assign a final decision on equipment requests. Select the methodology for processing requests. Five different methods have been created to provide quick and easy processing of requests.

Select one of the following:

- 1 APPROVE/FUNDED ALL LINE ITEMS
- 2 APPROVE/PENDING ALL LINE ITEMS
- 3 DISAPPROVE ALL LINE ITEMS
- 4 DEFER ALL LINE ITEMS
- 5 PROCESS INDIVIDUAL LINE ITEMS

Select the appropriate approval methodology to process multiple transactions.

Option 1 - APPROVE/FUNDED ALL LINE ITEMS should be used when all line items in a transaction have been designated 'approved and funded' and are ready for 2237 processing.

Option 2 - APPROVE/PENDING ALL LINE ITEMS should be used when all line items in a transaction have been approved, but funding is still pending.

Option 3 - DISAPPROVE ALL LINE ITEMS should be used when all line items in a transaction have not been approved.

Option 4 - DEFER ALL LINE ITEMS should be used when all line items in a transaction should be deferred until a later decision cycle.

Option 5 - PROCESS INDIVIDUAL LINE ITEMS should be used when some line items in the same transaction have been approved and some have not been approved.

**7.4.1 Step 1**

After selecting the method of approving/disapproving requests, a list of requests will display from which you can select the requests which will be processed accordingly. The following display shows the process for 'Approve/Pending All Line Items' which will change the status for all selected items to be 'Approved-Pending Funding'. This status allows for the creation of a 2237 when appropriate funding is available.

APPROVE/PENDING ALL LINE ITEMS in the following Equipment Requests					
Num#	Rank	Request #	Service	# Items	Amount
1	5	621-782-95-00003D	INFO RESOURCES MGMT	2	\$ 215.00
2	14	621-781-95-00001B	INFO RESOURCES MGMT	1	\$ 1000.00
3	9	621-780-95-00008	INFO RESOURCES MGMT	1	\$ 2250.00
4	12	621-323-95-00001	INFO RESOURCES MGMT	1	\$ 6200.00
5	7	621-780-95-00013B	INFO RESOURCES MGMT	1	\$ 1499.00
6	3	621-780-95-00001	INFO RESOURCES MGMT	0	\$ 0.00
7	9	621-323-95-00001A	INFO RESOURCES MGMT	1	\$ 6200.00
8	5	621-123-96-00001	INFO RESOURCES MGMT	1	\$ 200.00
9	1	621-123-96-00003	DIETETICS	1	\$ 100.00
10	3	621-666-96-00002	INFO RESOURCES MGMT	3	\$ 1300.00
11	2	621-666-96-00007	INFO RESOURCES MGMT	1	\$ 810.00

Select numbers to process: (1-11): 1 <RET>

Qty: 5                      Price: 25                      Total: 125  
 Description:  
     TEST ITEM 1

Qty: 3                      Price: 30                      Total: 90  
 Description:  
     TEST ITEM 2

Does this request need a final confirmation from the responsible CMR Official? N <RET> (No)

**7.4.2 Step 2**

Selecting 'Disapprove All Line Items' means that all chosen requests will be returned to the requestor and CMR Official with the status of 'Disapproved-Do No Resubmit'.

DISAPPROVE ALL LINE ITEMS in the following Equipment Requests					
Num#	Rank	Request #	Service	# Items	Amount
1	14	621-781-95-00001B	INFO RESOURCES MGMT	1	\$ 1000.00
2	9	621-780-95-00008	INFO RESOURCES MGMT	1	\$ 2250.00
3	12	621-323-95-00001	INFO RESOURCES MGMT	1	\$ 6200.00
4	7	621-780-95-00013B	INFO RESOURCES MGMT	1	\$ 1499.00
5	3	621-780-95-00001	INFO RESOURCES MGMT	0	\$ 0.00
6	9	621-323-95-00001A	INFO RESOURCES MGMT	1	\$ 6200.00
7	5	621-123-96-00001	INFO RESOURCES MGMT	1	\$ 200.00
8	1	621-123-96-00003	DIETETICS	1	\$ 100.00
9	3	621-666-96-00002	INFO RESOURCES MGMT	3	\$ 1300.00
10	2	621-666-96-00007	INFO RESOURCES MGMT	1	\$ 810.00

Select numbers to process: (1-10): 5 <RET>

### 7.4.3 Step 3

Selecting 'Defer All Line Items' means that the requestor or CMR Official may resubmit the request at another time.

DEFER ALL LINE ITEMS in the following Equipment Requests						
Num#	Rank	Request #	Service	# Items	Amount	
1	14	621-781-95-00001B	INFO RESOURCES MGMT	1	\$ 1000.00	
2	9	621-780-95-00008	INFO RESOURCES MGMT	1	\$ 2250.00	
3	12	621-323-95-00001	INFO RESOURCES MGMT	1	\$ 6200.00	
4	7	621-780-95-00013B	INFO RESOURCES MGMT	1	\$ 1499.00	
5	9	621-323-95-00001A	INFO RESOURCES MGMT	1	\$ 6200.00	
6	5	621-123-96-00001	INFO RESOURCES MGMT	1	\$ 200.00	
7	1	621-123-96-00003	DIETETICS	1	\$ 100.00	
8	3	621-666-96-00002	INFO RESOURCES MGMT	3	\$ 1300.00	
9	2	621-666-96-00007	INFO RESOURCES MGMT	1	\$ 810.00	
Select numbers to process: (1-9): 5 <RET>						
Qty: 2		Price: 3000		Total: 6000		
Description:						
REFRIGERATOR						

### 7.4.4 Step 4

Processing individual line items gives you the capability to partially approve or disapprove a request. You may either approve/disapprove multiple line items or even separate by the quantity requested. If the requestor asked for a quantity of two expensive items, and the budget could approve one, the item can be split. Requests will be split according to final status and quantity approved. The transaction number will remain the same but appended with A, B, C, etc. to show that it is split off the original request.

Equipment Committee

PROCESS INDIVIDUAL LINE ITEMS in the following Equipment Requests

Num#	Rank	Request #	Service	# Items	Amount
1	9	621-780-95-00008	INFO RESOURCES MGMT	1	\$ 2250.00
2	12	621-323-95-00001	INFO RESOURCES MGMT	1	\$ 6200.00
3	5	621-123-96-00001	INFO RESOURCES MGMT	1	\$ 200.00
4	1	621-123-96-00003	DIETETICS	1	\$ 100.00
5	3	621-666-96-00002	INFO RESOURCES MGMT	3	\$ 1300.00
6	2	621-666-96-00007	INFO RESOURCES MGMT	1	\$ 810.00

Select numbers to process: (1-6: **5 <RET>**)

Qty: 2                    Price: 400.00            Total: 800

Description:  
17 inch computer monitor.

Select one of the following:  
 AF            Approved and Funded  
 AP            Approved Pending Funds  
 DD            Disapproved  
 DF            Deferred until later

Select a status code: **AF <RET>**    Approved and Funded  
 Quantity requested: 2                    Quantity approved: 2 // 1 <RET>

Qty: 2                    Price: 400.00            Total: 800

Description:  
17 inch computer monitor

Select one of the following:  
 AF            Approved and Funded  
 AP            Approved Pending Funds  
 DD            Disapproved  
 DF            Deferred until later

Select a status code: **DD <RET>**    Disapproved  
 Quantity requested: 2                    Quantity approved: 1// <RET>

ITEM STATUS EXPLANATION:  
 1>ISN'T NEEDED AT THIS TIME <RET>  
 2><RET>

EDIT Option: <RET>

Qty: 1                    Price: 500.00            Total: 500

Description:  
A CD-ROM PLAYER

Select one of the following:  
 AF            Approved and Funded  
 AP            Approved Pending Funds  
 DD            Disapproved  
 DF            Deferred until later

Select a status code: **DF <RET>**    Deferred until later  
 Quantity requested: 1                    Quantity approved: 1// <RET>

ITEM STATUS EXPLANATION:  
 1>NOT ENOUGH IN CURRENT BUDGET <RET>  
 2> <RET>

EDIT Option: <RET>

Splitting this request. Please wait...  
 NEW TRANSACTION NUMBER: 621-666-96-00002A

Splitting this request. Please wait...  
 NEW TRANSACTION NUMBER: 621-666-96-00002B

### 7.3.5 Step 5

Mail messages will be sent to the requestor and CMR Official based upon the final decision of the Equipment Committee.

Subj: REQUEST APPROVED [#69] 14 Mar 96 19:49 3 Lines  
From: HEIM,ROSE in 'IN' basket. Page 1

-----  
The Equipment Committee has approved Equipment Request, Transaction #: 621-782-95-00003D pending funding. It will be purchased as soon as funding is received.

Select MESSAGE Action: IGNORE (in IN basket)// <RET> Ignored

Subj: REQUEST NOT APPROVED [#70] 14 Mar 96 19:50 3 Lines  
From: HEIM,ROSE in 'IN' basket. Page 1

-----  
The Equipment Committee has not approved Equipment Request, Transaction #: 621-780-95-00001. Please cancel this request.  
Explanation:

Select MESSAGE Action: IGNORE (in IN basket)// <RET> Ignored

Subj: REQUEST DEFERRED [#71] 14 Mar 96 19:50 3 Lines  
From: HEIM,ROSE in 'IN' basket. Page 1

-----  
The Equipment Committee has deferred Equipment Request, Transaction #: 621-323-95-00001A until a later time. Please resubmit this request later.

Select MESSAGE Action: IGNORE (in IN basket)// <RET> Ignored

Subj: REQUEST APPROVED! [#72] 14 Mar 96 19:52 2 Lines  
From: HEIM,ROSE in 'IN' basket. Page 1

-----  
The Equipment Committee has approved Equipment Request, Transaction #: 621-666-96-00002 for purchase.

Select MESSAGE Action: IGNORE (in IN basket)// <RET> Ignored

## 7.5 Service Priority Report

Prints requests in service priority. User has a choice of printing for all services or selecting a particular service.

### 7.5.1 All Services

Each service starts a new page.

```

Select one of the following:

      O      Select One Service
      A      Select All Services

Select Print Type : A <RET>   Select All Services
DEVICE: HOME// <RET>

REQUESTS BY SERVICE PRIORITY                               May 14, 1996 10:52 am PAGE: 1

TRANSACTION #      PRIORITY      TYPE      COST      QUANTITY  TOTAL
ITEM DESCRIPTION  / COMPONENT  JUSTIFICATION
-----
SERVICE: INFO RESOURCES MGMT

621-666-96-00007   2      ADDITION
FAX MACHINE - CANON  PARENT SYSTE  550.00    1      550.00
621-323-95-00001   4      REPLACEM
REFRIGERATOR       PARENT SYSTE  3000.00   2      6000.00
Press RETURN to continue or '^' to quit. <RET>

REQUESTS BY SERVICE PRIORITY                               May 14, 1996 10:53 am PAGE: 4

TRANSACTION #      PRIORITY      TYPE      COST      QUANTITY  TOTAL
ITEM DESCRIPTION  / COMPONENT  JUSTIFICATION
-----
SERVICE: DIETETICS

621-123-96-00005   3      ADDITION
ANOTHER ITEM FOR THE PARENT SYSTE  250.00    1      250.00
KITCHEN
Press RETURN to continue or '^' to quit. <RET>

REQUESTS BY SERVICE PRIORITY                               May 14, 1996 10:53 am PAGE: 5

TRANSACTION #      PRIORITY      TYPE      COST      QUANTITY  TOTAL
ITEM DESCRIPTION  / COMPONENT  JUSTIFICATION
-----
SERVICE: ENGINEERING

621-136-96-00010   1      ADDITION
IBM PENTIUM 120 W/16 MB PARENT SYSTE  300.00    2      600.00
MEMORY, ISA CARD
CONNER TAPE DRIVE  PARENT SYSTE  450.00    2      900.00
-----
8300.00
    
```

### 7.5.2 One Service

Selecting one service.

```
Select one of the following:

      O      Select One Service
      A      Select All Services

Select Print Type : O <RET>  Select One Service
Select SERVICE/SECTION NAME: DIETETICS <RET>
DEVICE: HOME// <RET>

REQUESTS BY SERVICE PRIORITY                               May 14, 1996 10:53 am PAGE: 1

TRANSACTION #      PRIORITY          TYPE          COST    QUANTITY  TOTAL
ITEM DESCRIPTION          / COMPONENT
                          JUSTIFICATION
-----
SERVICE: DIETETICS

621-123-96-00005    3          ADDITION
  ANOTHER ITEM FOR THE  PARENT SYSTE  250.00    1        250.00
  KITCHEN
                                     -----
                                     250.00
```

# CHAPTER 8 WAREHOUSE

The warehouse menu allows the person who has been assigned the security key, PRCNWHSE, to assign someone to pick up equipment that is being turned in. The person assigned to pick up the item(s) must check in the turned-in item, and sign that it has been turned in before the Personal Property Manager can complete the final disposition of the item being turned in.

```
There are 2 Turn-In requests to review.

      Process Equipment Turn-In Request (Warehouse)
      Display/Print Turn-In Request

Select Warehouse Turn-In Menu Option:
```

## 8.1 Step 1 Assigning Someone to Pick-Up Turn-in Equipment

```
Select Option:  PROC<RET>ess Equipment Turn-In Request (Warehouse)
Select TURN-IN REQUEST TRANSACTION CODE:  ? <RET>
      ANSWER WITH TURN-IN REQUEST NUMBER, OR TRANSACTION CODE
CHOOSE FROM:
47          621-132-96-00006   Pending Warehouse Pickup
49          621-420-96-00028   Pending Warehouse Pickup

Select TURN-IN REQUEST TRANSACTION CODE:  49 <RET>      621-420-96-00028
MFGR. EQUIPMENT NAME:  BINDING SYSTEM
MANUFACTURER:  ZZ VELOBIND
MODEL:  750
NXRN #: 18329
TOTAL ASSET VALUE: 3296.00
CMR: 420 SUPPLY (OFFICE)
LOCATION:
WAREHOUSE OFFICIAL:

-----
Assign turn-in # 621-420-96-00028 to whom?:  ? <RET>
      ANSWER WITH NEW PERSON NAME
      DO YOU WANT THE ENTIRE 33-ENTRY NEW PERSON LIST?:  N <RET>  (NO)
Assign turn-in # 621-420-96-00028 to whom?:  SMITH,BILL <RET>
```

## 8.2 Step 2

When the person assigned to pick up the item(s) has done so, the assigned Warehouse Official must sign onto the menu option and answer that it has been picked up. He/she is also given the chance to modify the DISPOSAL CONDITION CODE if it is other than what the PPM thought it would be.

## Warehouse

```
Select Option: PROC<RET>ess Equipment Turn-In Request (Warehouse)
Select TURN-IN REQUEST TRANSACTION CODE: ? <RET>
ANSWER WITH TURN-IN REQUEST NUMBER, OR TRANSACTION CODE
CHOOSE FROM:
47          621-132-96-00006   Pending Warehouse Pickup
49          621-420-96-00028   Pending Warehouse Pickup

Select TURN-IN REQUEST TRANSACTION CODE: 49 <RET>    621-420-96-00028   Pending Warehouse Pickup

MFGR. EQUIPMENT NAME:  BINDING SYSTEM
MANUFACTURER:  ZZ VELOBIND
MODEL:  750
NXRN #: 18329
TOTAL ASSET VALUE: 3296.00
CMR:  420 SUPPLY (OFFICE)
LOCATION:
WAREHOUSE OFFICIAL:  SMITH,BILL

-----
Is this the correct item turned in?:  Y <RET>
DISPOSAL CONDITION CODE:  Used-Fair// ? <RET>
Choose from:
1      Unused-Good
2      Unused-Fair
3      Unused-Poor
4      Used-Good
5      Used-Fair
6      Used-Poor
7      Repairs Required-15% of a/c or less
8      Repairs Required-16%-40% of a/c
9      Repairs Required-41%-65% of a/c
X      Salvage
S      Scrap
DISPOSAL CONDITION CODE:  Used-Fair// X <RET>    Salvage
Hit RETURN to continue. <RET>

ENTER YOUR ELECTRONIC SIGNATURE CODE:      CODE <RET>      Thank you.
```

### 8.3 Step 3

At this stage of the turn-in process, capitalized items will be handled differently from non-capitalized items. Capitalized items have sent an FA Code Sheet to FMS (Financial Management System) and must have an FD Code Sheet also sent to disposition the record in FMS. Turn-in of capitalized items also includes the updating of the general ledger in the Fixed Asset portion of FMS and the CMR must also be updated. Non-capitalized items will return to the PPM and allow the PPM to process the turn-in through the Final Disposition option. Capitalized items must wait until a FD Code Sheet is generated and a new FA Code Sheet has also been generated.

# CHAPTER 9 TURN-INS

## 9.1 Requestor

If you wish to turn-in equipment without ordering replacement equipment, select the Process Equipment Turn-Ins menu option so that the request may go through the proper channels.

### 9.1.1 Enter Excess Equipment Turn-In Request

#### 9.1.1.1 Step 1

Select the Enter Excess Equipment Turn-In Request option from the Process Turn-Ins menu. The first two entries you make establish the temporary request number for this turn-in document. If your site parameters are set up for a multi-divisional site, you will be asked to identify the Station Number, otherwise it will automatically default to your station number.

```
Select STATION NUMBER (^ TO EXIT):621// <RET> MOUNTAIN HOME
```

#### 9.1.1.2 Step 2

Select the CMR Responsible Official responsible for the equipment being turned in.

```
Select CMR NAME: 420 <RET> SUPPLY (OFFICE) ACQUISITION & MATERIAL MGMT SMITH,BILL  
This Request has been assigned Transaction #: 621-420-96-00028
```

Your equipment turn-in document has now been assigned a temporary transaction number. Refer to this number during the life cycle of the request.

#### 9.1.1.3 Step 3

You will be asked next to select the items from the Equipment Inventory (AEMS/MERS) file that you wish to turn in. After you have selected and filled in the justification for turning in this equipment, it will go to the responsible CMR Responsible Official for review and approval.

## Turn-Ins

```
Select REPLACEMENT ITEM NUMBER: 76096 11077 <RET> BINDING SYSTEM IN USE 3610-5052
TURN-IN LINE ITEM TURN-IN LINE ITEM NUMBER: 1// <RET>
TURN-IN LINE ITEM DESCRIPTION: BINDING SYSTEM// <RET>
CSN: 1005-000667
Description: BINDING SYSTEM
Model #: 750
Manufacturer: ZZVELOBIND
Acquisition Value: $3296.00
JUSTIFICATION: ?
CHOOSE FROM:
1 Fair wear and tear
2 Excess equipment failure/repair
3 Upgrade
4 State-of-art technology
5 Replacement due to loss or damage
6 Other
JUSTIFICATION: 2 <RET> Excess equipment failure/repair
Select TURN-IN LINE ITEM: <RET>

Is this request ready for CMR Approval? Y <RET> YES
```

### 9.1.2 Edit Excess Equipment Turn-In Document

If a turn-in document has been left incomplete, then the ability exists for you, the requestor, to make changes and even add additional items.

```
Select TURN-IN REQUEST TRANSACTION CODE: 621-420-96-00028 <RET> Pending CMR Official Review
DEVICE: HOME// <RET> LAN

TRANSACTION CODE: 621-420-96-00028
REQUESTING SERVICE: ACQUISITION & MATERIEL MGMT
REQUEST DATE/TIME: MAR 06, 1996@09:57:56
CMR RESPONSIBLE OFFICIAL: JACKSON,ANNE
STATUS DATE: MAR 06, 1996
CMR OFFICIAL EXPLANATION:

REQUESTOR: QUE,SUZIE
STATION NUMBER: 621
CMR OFFICIAL APPROVAL:

TURN-IN LINE ITEMS: 1
EQ. REQUEST LINE NUMBER: 345
MFGR. EQUIPMENT NAME: BINDING SYSTEM
MANUFACTURER: ZZ VELOBIND
MODEL: 750
NXRN #: 18329
ACQUISITION VALUE: 3296.00
CMR: 420 SUPPLY (OFFICE)
LOCATION:
WAREHOUSE OFFICIAL:

Serial #: 76096
CATEGORY STOCK NUMBER: 3610-438983
ACQUISITION DATE: MAR 09, 1992
REPLACEMENT DATE: MAR 09, 2007
```

### 9.1.3 Cancel Excess Equipment Turn-In Request

The ability to cancel an incomplete or returned turn-in document also exists.

```

Enter TRANSACTION #:  ? <RET>
ANSWER WITH EQUIPMENT REQUEST NUMBER, OR TRANSACTION NUMBER
CHOOSE FROM:
1                               621-666-95-00006   Pending Completion by Requestor

Enter TRANSACTION #:  1 <RET>      621-666-95-00006   Pending Completion by Requestor

Service:  IRM                               CMR Official:  JACKSON,ANNE
Requester:  QUE,SUZIE                       Date Entered:  DEC 07, 1993
Line Items:
  Number:  1                               Description:  CONT BARIUM FLOW XRAY
  Number:  2                               Description:  COMPUTER DIGITAL

Are you sure you want to cancel this turn-in?  NO// Y <RET>   (YES)

```

## 9.2 CMR Official

The CMR Responsible Official must review and approve Turn-In documents since they are responsible for that equipment.

```

Enter Equipment Turn-In Request
Edit Equipment Turn-In Request
Cancel Turn-In Request
Display/Print Turn-In Request
Approve Equipment Turn-In Request (CMR)

Select Process Equipment Turn-Ins Menu Option:

```

### 9.2.1 Enter Equipment Turn-In Request

A CMR Responsible Official can act as a requestor for entering turn-in documents. See 9.1.2 for more information.

### 9.2.2 Edit Equipment Turn-In Request

See 9.1.3 for more information.

### 9.2.3 Cancel Turn-In Request

See 9.1.4 for more information.

### 9.2.4 Display/Print Turn-In Request

```

Select Turn-In TRANSACTION #: ? <RET>
Answer with TURN-IN REQUEST NUMBER, or TRANSACTION CODE
Do you want the entire 34-Entry TURN-IN REQUEST List? Y <RET> (Yes)
Choose from:
25          621-780-95-00007      Turn-in Completed
26          621-780-95-00012      Pending PPM Final Disposition
27          621-323-95-00002      Pending PPM Final Disposition
28          621-323-95-00003      Pending Warehouse Pickup
29          621-123-96-00006      Cancelled Request
30          621-123-96-00007      Cancelled Request
31          621-666-96-00001      Pending Warehouse Pickup
38          621-666-96-00010      Pending PPM Review
39          621-136-96-00002      Pending PPM Review
49          621-780-96-00001      Pending CMR Official Review
50          621-780-96-00002      Pending Completion by Requestor
51          621-780-96-00003      Pending CMR Official Review
52          621-780-96-00004      Pending CMR Official Review
53          621-780-96-00006      Pending Completion by Requestor
54          621-666-96-00013      Pending Completion by Requestor
55          621-666-96-00015      Pending Completion by Requestor

Select Turn-In TRANSACTION #: 39 <RET> 621-136-96-00002      Pending PPM Review
DEVICE: HOME// <RET>

TRANSACTION CODE: 621-136-96-00002      REQUESTOR: QUE,SUZIE
REQUESTING SERVICE: ENGINEERING
REQUEST DATE/TIME: MAR 01, 1996@15:35:55 STATION NUMBER: 621
CMR RESPONSIBLE OFFICIAL: JACKSON,ANNE
REQUEST STATUS: Pending PPM Review
STATUS DATE: MAR 08, 1996      CMR OFFICIAL APPROVAL: YES
CMR OFFICIAL EXPLANATION:

TURN-IN LINE ITEMS:
EQ. REQUEST LINE NUMBER: 1
ENTRY NUMBER: 51
MFGR. EQUIPMENT NAME: HYDRAULIC LIFT BED
MANUFACTURER:
MODEL:          SERIAL #:
NXRN #:          CATEGORY STOCK NUMBER:
TOTAL ASSET VALUE:  ACQUISITION DATE:
CMR: 136          REPLACEMENT DATE:
LOCATION:
JUSTIFICATION: Fair wear and tear
OTHER JUSTIFICATION:

Press RETURN to continue, or '^' to exit. <RET>

DISPOSAL CONDITION CODE:
WAREHOUSE OFFICIAL:

TOTAL REPAIR COSTS: 0
    
```

### 9.2.5 Approve Equipment Turn-In Request

The CMR Responsible Official responsible for the equipment must review and approve any turn-in documents prior to review by the Personal Property Manager. The CMR Responsible Official will be notified when a turn-in request has been generated with an alert message.

#### 9.2.5.1 Step 1

Select the request you wish to review.

```

Select CMR Official Menu Option: APP<RET>rove Equipment Turn-In Request (CMR)

Select TURN-IN REQUEST TRANSACTION CODE: ? <RET>
Choose from:
49 621-420-96-00028          Pending CMR Official Review

Select TURN-IN REQUEST TRANSACTION CODE: 49 <RET>    621-420-96-00028    Pending CMR Official
Review
DEVICE: HOME// <RET> LAN

```

### 9.2.5.2 Step 2

The request will display on the screen.

```

TRANSACTION CODE: 621-420-96-00028          REQUESTOR: QUE,SUZIE
REQUESTING SERVICE: ACQUISITION & MATERIEL MGMT
REQUEST DATE/TIME: MAR 06, 1996@09:57:56    STATION NUMBER: 621
CMR RESPONSIBLE OFFICIAL: SMITH,BILL
REQUEST STATUS: Pending CMR Official Review
STATUS DATE: MAR 06, 1996

TURN-IN LINE ITEMS:
EQ. REQUEST LINE NUMBER: 1
MFGR. EQUIPMENT NAME: BINDING SYSTEM
MANUFACTURER: ZZ VELOBIND
MODEL: 750                                SERIAL #: 76096
NXRN #: 18329                             CATEGORY STOCK NUMBER: 3610-438983
ACQUISITION VALUE: 3296.00                ACQUISITION DATE: MAR 09, 1992
CMR: 420 SUPPLY (OFFICE)                   REPLACEMENT DATE: MAR 09, 2007
LOCATION:
WAREHOUSE OFFICIAL:

CMR OFFICIAL APPROVAL: Y <RET>            YES

ENTER YOUR ELECTRONIC SIGNATURE CODE:      CODE <RET>          Thank you.

```

## 9.3 PPM Official

The PPM processes turn-ins in three steps; reviewing turn-in requests, reviewing completed work orders, and sending to the warehouse for pickup. PPM must first review any turn-in requests to determine if a work order must be created in order for Engineering to disconnect or otherwise remove the equipment. After Engineering has performed its' work order, the PPM needs to tell the warehouse that item(s) need to be picked-up by the warehouse. After the warehouse has picked up the item, the PPM will perform final disposition of the item.

## Turn-Ins

```
Good morning GEORGE
You last signed on today at 11:00
Select TERMINAL TYPE NAME: C-VT220// <RET>
    Digital Equipment Corporation VT-220 terminal

There are 2 equipment requests Pending Equipment Committee Review/Rank.
There are 14 equipment requests Approved - Funded.
There are 3 equipment requests Ready for 2237 Processing.

There are 2 turn-in requests Pending PPM Review.
There are 2 turn-in requests Pending PPM Final Disposition.
There are 2 turn-in requests Work Order Completed.

Review Equipment Requests (PPM)
Edit Equipment Requests (PPM)
Cancel Equipment Requests
Rank Equipment Requests
Create 2237 (PPM)
Display/Print Equipment Requests (PPM)
Equipment Request Reports Menu ...
Process Equipment Turn-Ins Menu ...

Select Equipment Request Menu (PPM) Option: PROC<RET>ess Equipment Turn-Ins Menu
```

### **9.3.1 Process Turn-In Request (Pending PPM Review)**

The PPM will review the item(s) being turned in and assign a preliminary DISPOSAL CONDITION CODE and possible DISPOSITION METHOD and makes the determination if a work order is needed. If a work order is needed for a particular item for Engineering, the PPM will be prompted, 'Should a work order be generated for this line item?' for each item in the request so they can create one and forward it to Engineering. Not all items in a request may need to have a work order produced for turn-in. See Engineering User Manual on how to process a work order. When the DATE COMPLETED has been entered by Engineering, the turn-in will return to the PPM.

```

TRANSACTION CODE: 621-666-96-00006      REQUESTOR: QUE,SUZIE
REQUESTING SERVICE: INFO RESOURCES MGMT
REQUEST DATE/TIME: JAN 26, 1996@10:42:46 STATION NUMBER: 621
CMR RESPONSIBLE OFFICIAL: JACKSON,ANNE
REQUEST STATUS: Pending PPM Review
STATUS DATE: MAR 08, 1996                CMR OFFICIAL APPROVAL: YES
CMR OFFICIAL EXPLANATION:
  ENTRY NUMBER: 65
  MFGR. EQUIPMENT NAME: PENTIUM 60
  MANUFACTURER:
  MODEL:                                SERIAL #:
  NXRN #:                                CATEGORY STOCK NUMBER:
  TOTAL ASSET VALUE:                     ACQUISITION DATE:
  CMR: 666                                REPLACEMENT DATE:
  LOCATION:
  JUSTIFICATION: Upgrade
  OTHER JUSTIFICATION:
  DISPOSAL CONDITION CODE:
  WAREHOUSE OFFICIAL:

DISPOSAL CONDITION CODE: ? <RET>
  Choose from:
    1      Unused-Good
    2      Unused-Fair
    3      Unused-Poor
    4      Used-Good
    5      Used-Fair
    6      Used-Poor
    7      Repairs Required-15% of a/c or less
    8      Repairs Required-16%-40% of a/c
    9      Repairs Required-41%-65% of a/c
    X      Salvage
    S      Scrap
DISPOSAL CONDITION CODE: 5 <RET>   Used-Fair

Should a work order be generated for this line item? Y <RET>   (Yes)

Does this turn-in require a work order
Enter Yes or No: YES// <RET>
Work Order #: TI960514-001
TASK DESCRIPTION (60 char): Prepare equipment for turn-in.
  Replace <RET>
CONTACT PERSON: WASHER,GEORGE// <RET>
COMMENTS:
  1> <RET>
Want to print this new work order?
Enter Yes or No: NO// <RET>
Select TURN-IN REQUEST TRANSACTION CODE: <RET>

```

### 9.3.2 Process Turn-In Request (Work Order Completed)

The PPM will send the request to the Warehouse to pick up the item(s) being turned in. See Chapter 8 Warehouse to review this step.

## Turn-Ins

```
Select Process Equipment Turn-Ins Menu Option: PROC<RET>ess Equipment Turn-In Request (PPM)
Select TURN-IN REQUEST TRANSACTION CODE: ?? <RET>

Choose from:
  28          621-323-95-00003      Work Order Completed
  35          621-666-96-00006      Work Order Completed
  38          621-666-96-00010      Pending PPM Review
  39          621-136-96-00002      Pending PPM Review

Select TURN-IN REQUEST TRANSACTION CODE: 28 <RET> 621-323-95-00003      Work Order Completed
DEVICE: HOME// <RET>

TRANSACTION CODE: 621-323-95-00003      REQUESTOR: QUE,SUZIE
REQUESTING SERVICE: INFO RESOURCES MGMT
REQUEST DATE/TIME: AUG 15, 1995@17:47:42 STATION NUMBER: 621
CMR RESPONSIBLE OFFICIAL: SMITH,BILL
REQUEST STATUS: Work Order Completed
STATUS DATE: MAY 14, 1996              CMR OFFICIAL APPROVAL: YES
CMR OFFICIAL EXPLANATION:
  NEED TO REPLACE MORE THAN ONE
Is this request ready to go to Warehouse for pickup? Yes// <RET> (Yes)
Select TURN-IN REQUEST TRANSACTION CODE: 35 <RET> 621-666-96-00006      Work Order Completed
DEVICE: HOME// <RET>

TRANSACTION CODE: 621-666-96-00006      REQUESTOR: QUE,SUZIE
REQUESTING SERVICE: INFO RESOURCES MGMT
REQUEST DATE/TIME: JAN 26, 1996@10:42:46 STATION NUMBER: 621
CMR RESPONSIBLE OFFICIAL: JACKSON,ANNE
REQUEST STATUS: Work Order Completed
STATUS DATE: MAY 14, 1996              CMR OFFICIAL APPROVAL: YES
CMR OFFICIAL EXPLANATION:
Is this request ready to go to Warehouse for pickup? Yes// <RET> (Yes)
Select TURN-IN REQUEST TRANSACTION CODE: <RET>
```

### 9.3.3 Final Disposition of a Turn-In

After Engineering has processed the work order (if one was needed), and the Warehouse has picked up the equipment, the turn-in is sent back to the PPM for final disposition and processing of the item(s) which may include generating a FD code sheet for FMS.

Select TURN-IN REQUEST TRANSACTION CODE: 621-780-95-00012 <RET> Pending PPM Final Disposition  
DEVICE: HOME// <RET>

TRANSACTION CODE: 621-780-95-00012           REQUESTOR: QUE,SUZIE  
REQUESTING SERVICE: INFO RESOURCES MGMT  
REQUEST DATE/TIME: AUG 05, 1995           STATION NUMBER: 621  
CMR RESPONSIBLE OFFICIAL: SMITH,BILL  
REQUEST STATUS: Pending PPM Final Disposition  
STATUS DATE: MAR 06, 1996                CMR OFFICIAL APPROVAL: YES  
CMR OFFICIAL EXPLANATION:

Select REPLACEMENT ITEM NUMBER: 29// <RET>

ENTRY NUMBER: 29  
MFGR. EQUIPMENT NAME: HONEYWELL CONTROL MONITOR  
MANUFACTURER:  
MODEL:                                       SERIAL #:  
NXRN #:                                      CATEGORY STOCK NUMBER: 6110-386607  
TOTAL ASSET VALUE: 450.00                ACQUISITION DATE: JAN 01, 1984  
CMR:   REPLACEMENT DATE:  
LOCATION:  
JUSTIFICATION: State-of-art technology  
OTHER JUSTIFICATION:  
DISPOSAL CONDITION CODE: Used-Good  
WAREHOUSE OFFICIAL: ACORD,ARLIS

DISPOSITION METHOD: B// <RET>

DISPOSITION VALUE: <RET>

Select REPLACEMENT ITEM NUMBER: <RET>

Enter ELECTRONIC SIGNATURE CODE:                    CODE <RET>   Thank you.

## Turn-Ins

## CHAPTER 10 GLOSSARY

<b>2237</b>	VA Form 2237, used to request goods and services.
<b>AEMS-MERS</b>	Name of the computer system located at each medical center to support Consolidated Memorandum of Receipts.
<b>Application Coordinator</b>	The individuals responsible for the implementation, training and trouble-shooting of a software package within a service. IFCAP requires that there be an Application Coordinator designated for Fiscal Service and the Control Points (Requesting Services).
<b>Category Stock Number</b>	A number used to identify non-expendable types of equipment.
<b>CSN</b>	See Category Stock Number.
<b>Equipment Management</b>	A section/division of A&MM Service or similar activity responsible for screening all equipment requests. They are accountable for all equipment (CMRs) at the facilities they support.
<b>FMS</b>	Financial Management System - System that replaced CALM.
<b>Integrated Supply Management System (ISMS)</b>	System in which catalog information exists. You can query for description and category stock number.
<b>Item Master File</b>	A data base of items specific to each A&MMS. This file maintains a full description of the item and costs, as well as other related information, such as stock number, vendor, contract number and a procurement history.
<b>Item Master Number</b>	A computer generated number used to identify an item in the Item Master file.
<b>National Stock Number</b>	A number used to identify expendable supply items.
<b>NSN</b>	See National Stock Number.

<b>PPM/MMS</b>	Personal Property Management/Materiel Management Service.
<b>Purchase Order</b>	A government document authorizing the purchase of the goods or services at the terms indicated.
<b>Purchasing Agent</b>	The employee authorized to place orders with vendors.
<b>Short Description</b>	A phrase which describes the item in the Item Master file. It is restricted to 3 to 60 characters and consists of what the item is, the kind of item and the size of item (i.e., GLOVE-SURGICAL-MED).
<b>Subaccount/BOC</b>	A Fiscal Code which related to financial accounting/budget information.
<b>Tasked Job</b>	A job, usually a printout, that has been scheduled to run at a predetermined time. Tasked jobs are set up to run automatically.
<b>VA Form 2237</b>	VA Form 2237, used to request goods and services.
<b>Vendor File</b>	An IFCAP (or FMS) file of vendors with which the facility does business. This file contains ordering and billing addresses, contract information, FPDS information and telephone numbers. File 440 contains information about the vendors that your station does business with. The debtor's address may be drawn from this file but is maintained separately. If the desired vendor is not in the file, contact A&MM Service to have it added.
<b>Vendor ID Number</b>	The ID number assigned to a vendor by FMS.