CTS User Manual

IH – Equipment Tracking

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Introduction

The CTS Industrial Hygiene (IH) Equipment Tracking program provides a user-friendly system to maintain your industrial hygiene equipment inventory. Using this software correctly can help ensure fast, easy, and secure access to equipment inventory records.

With IH Equipment Tracking, your organization will be able to save time and money by reducing inventory control discrepancies. This program is designed to inventory and track the calibration or use status of equipment used as part of your exposure monitoring program.

CTS IH Equipment Tracking has three main process areas for data management and use of IH Equipment:

- Manufacturer and Model Management

- Equipment List

- Equipment Check-In/Check-Out

Chapter 1 – About IH Equipment Tracking

The CTS IH Equipment Tracking Program is designed to inventory and track the calibration or use status of equipment used as part of your exposure monitoring program.

IH Equipment Tracking Roles

There are two main roles associated with the CTS IH Equipment tracking process:

Equipment Custodian is the responsible person for a specific piece of equipment which they have taken 'ownership' of for use in the exposure monitoring process.

Equipment Manager is generally responsible for the IH Lab and who is the primary individual who maintains the calibration/recall requirements for different manufacturers and models of equipment.

The equipment manager is often also an equipment custodian since it is very common for the IH Equipment Manager to run an Industrial Hygiene lab. Their duties can include tracking all equipment that is not in the field being used by an Industrial Hygienist.

Manufacturer and Model

Manufacturer and Model management is typically for only one or two people since this area defines the acceptable models of equipment for use, as well as how they are used and under what conditions. An important piece of the Manufacturer and Model Input is the defining of "Review or Recall Events." A review or recall event is a specific item or task that must be met, such as a calibration or inspection. A review / recall event is defined as a *one-time event* or an event with a definable frequency such as every six months or annually.
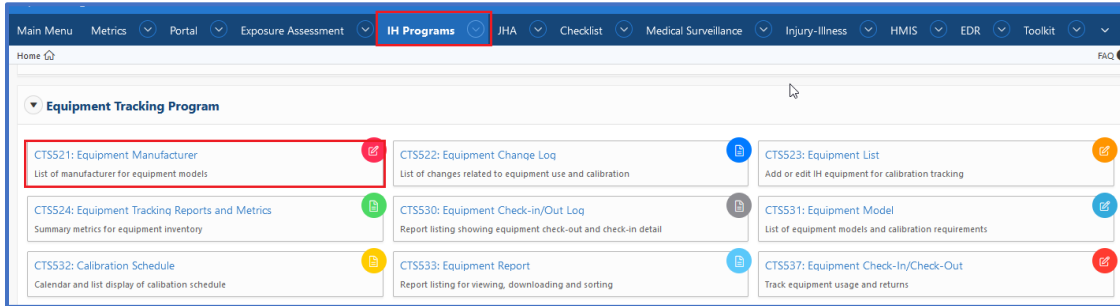
Equipment List

Equipment List is an inventory of all equipment whether the equipment is available for use, out for service, or any other status.
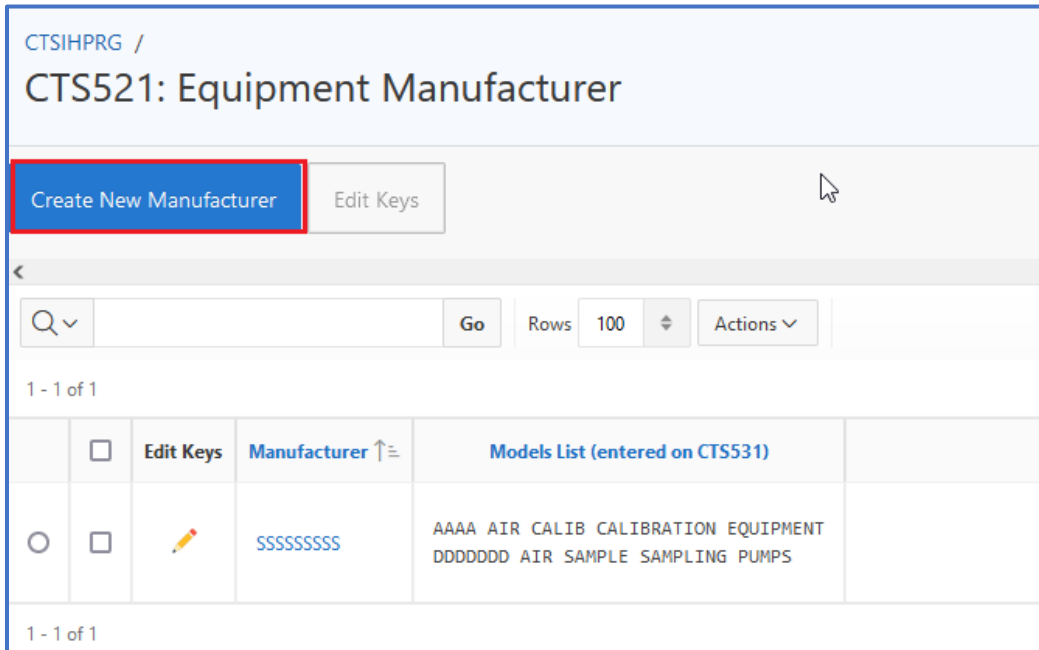
Chapter 2 – Equipment Manufacturer
CTS521: Equipment Manufacturer
Create New Manufacturer

From **IH Programs** menu, click **CTS521: Equipment Manufacturer** button.

Click **Create New Manufacturer** button.

Enter *Manufacturer* name, *Address, Phone* numbers, *Fax* number, and *Comments* in text boxes.
Use calendar button to select *Last updated* date.
Click **Save and Continue** button.

Field	Description
Manufacturer	Enter name of manufacturer.
Address	Enter address of manufacturer.
Phone #s	Enter phone number(s) of manufacturer.
Fax #	Enter fax number of manufacturer.
Comments	Enter any additional comments about manufacturer.
Last updated	Enter date manufacturer entry was last updated.

Edit Existing Manufacturer

Use radio button to select a manufacturer.
Click **Edit Keys** button.
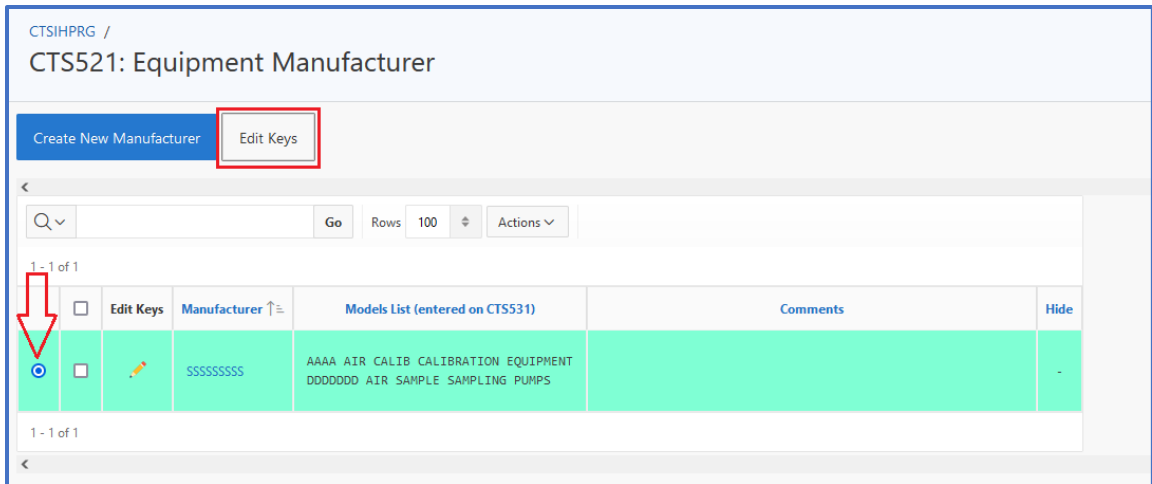
Edit manufacturer details.

Click **Save and Continue** button.
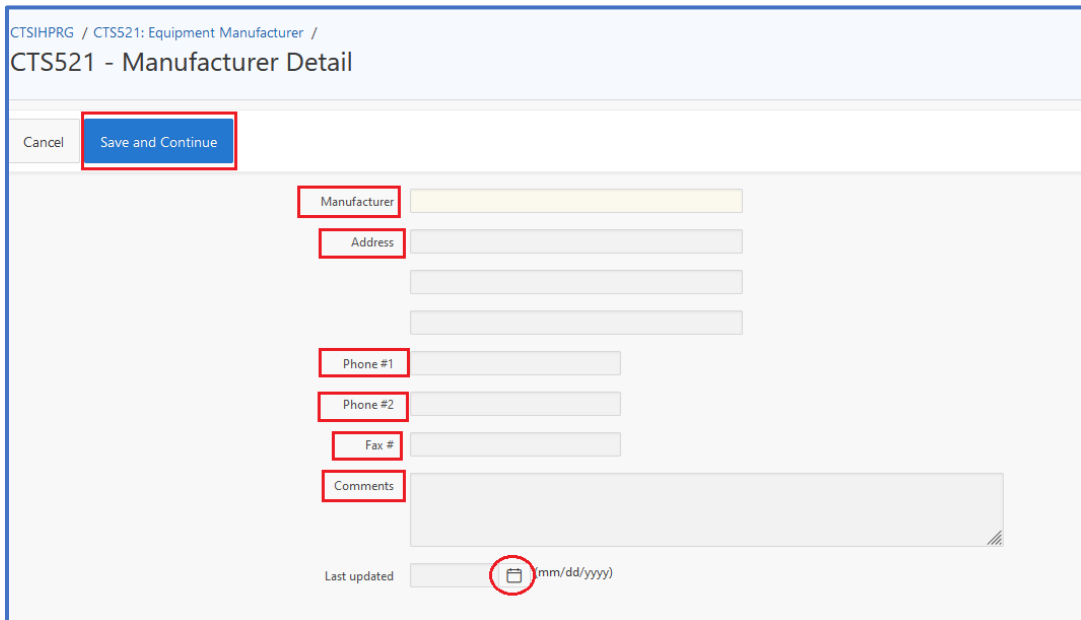
Print Manufacturer Report

Click any *Manufacturer* hot link to view its report in a new browser tab.

Close browser tab when finished viewing report.

Delete Manufacturer

Click checkbox to select a manufacturer.

Click **Delete Checked** button.

Click **OK** in alert box to confirm delete.
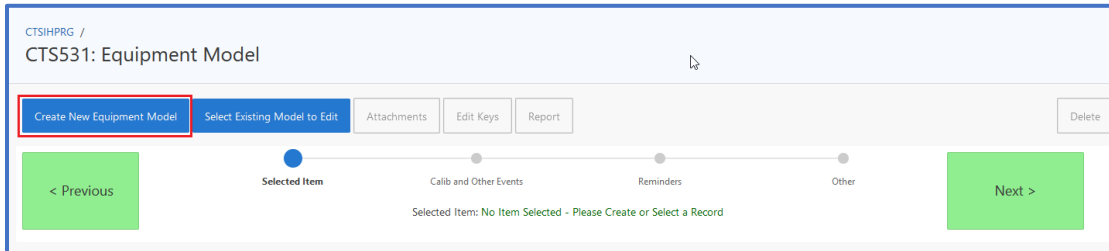
Chapter 3 – Equipment Model

CTS531: Equipment Model

Create New Equipment Model

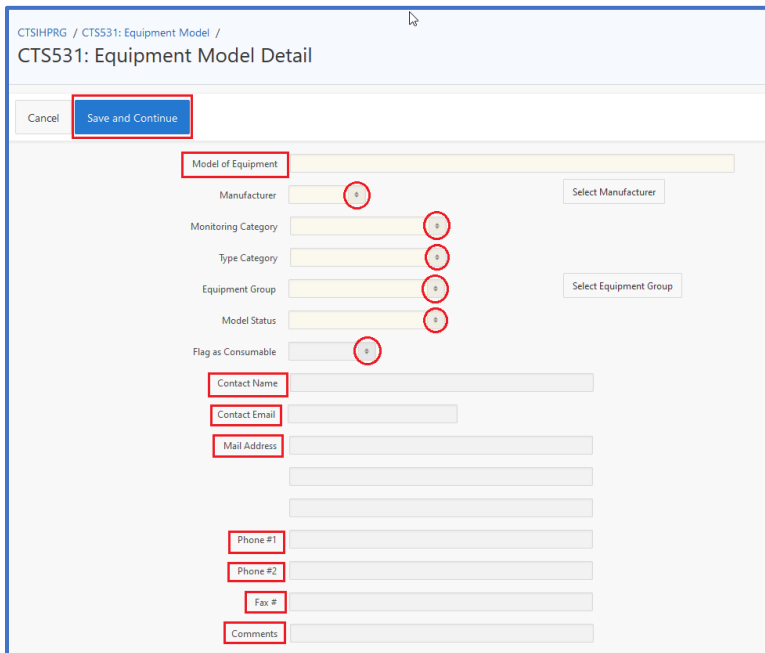Click **CTS531: New Equipment Model** button.
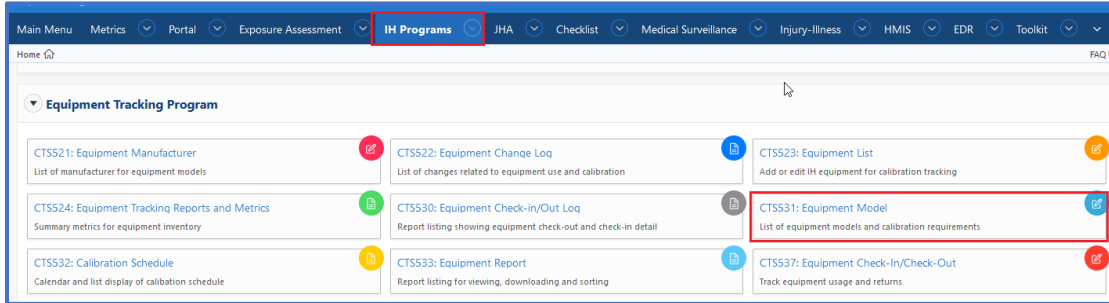
Click **Create New Equipment Model** button.

Enter text into *Model of Equipment*, *Contact Name*, *Contact Email*, *Mail Address*, *Phone #s*, *Fax #,* and *Comments* text boxes.

Use pulldown menus to select *Manufacturer*, *Monitoring Category*, *Type Category*, *Equipment Group*, *Model Status*, and *Flag as Consumable*.
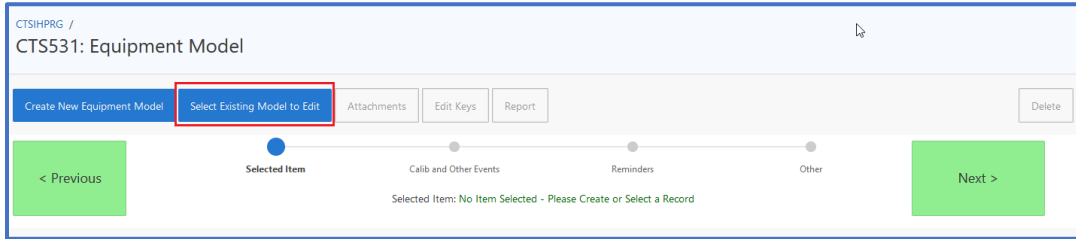
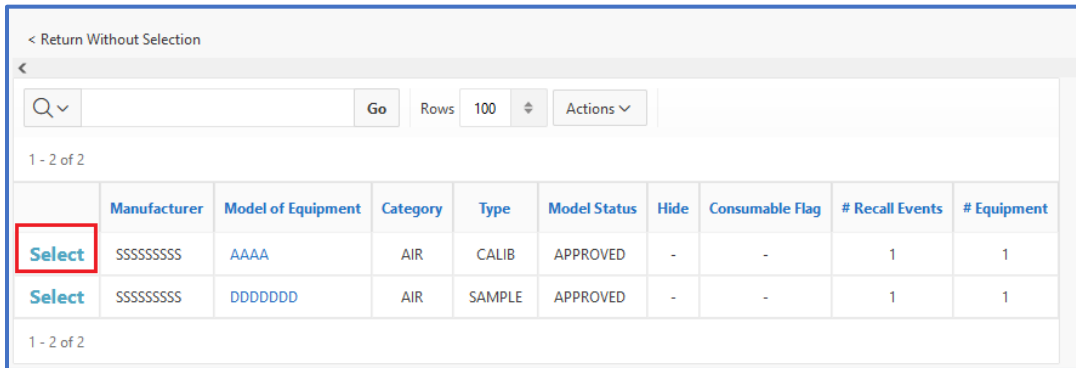Click **Save and Continue** button.

| Field	Description
Model of Equipment	Enter model name.
Manufacturer	Select manufacturer of model.
Monitoring Category	Select model monitoring category.
Type Category	Select model type category.
Equipment Group	Select model equipment group.
Model Status	Select status of model.
Flag as Consumable	Select consumable if applicable.
Contact Name	Enter name of contact for equipment model.
Contact Email	Enter email of contact person.
Mail Address	Enter mailing address of contact person.
Phone #s	Enter phone number(s) of contact person.
Fax #	Enter fax number of contact person.
Comments	Enter any additional comments about equipment model.

Edit Existing Model

Click **Select Existing Model to Edit** button.

Click blue **Select** text to choose a model.
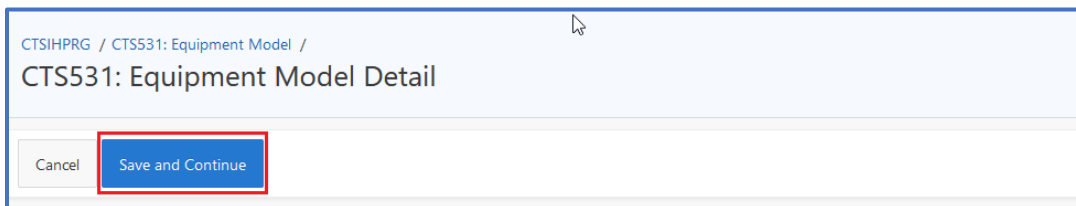

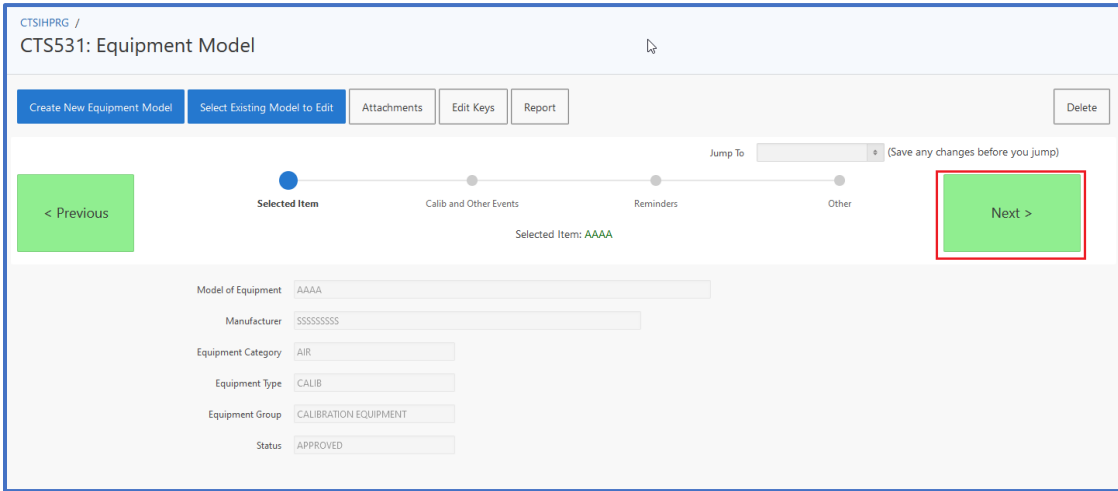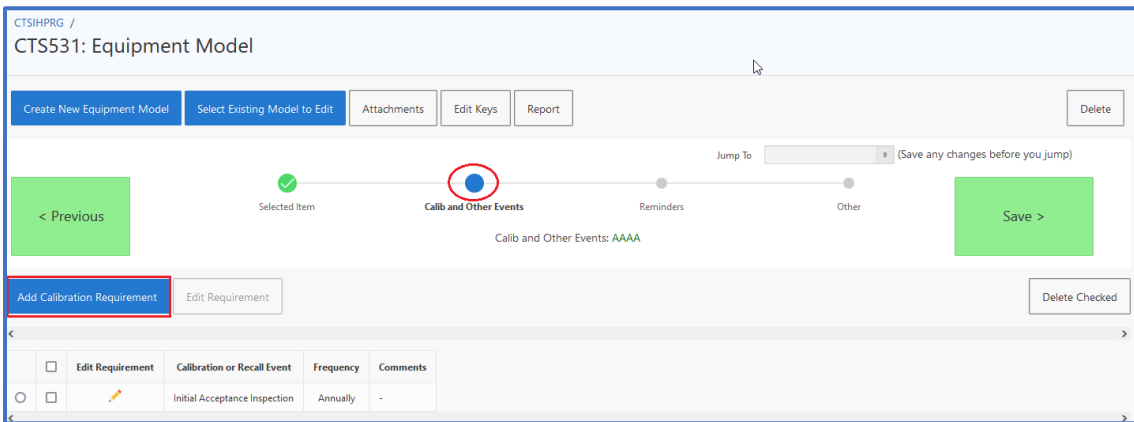Click **Edit Keys** button.
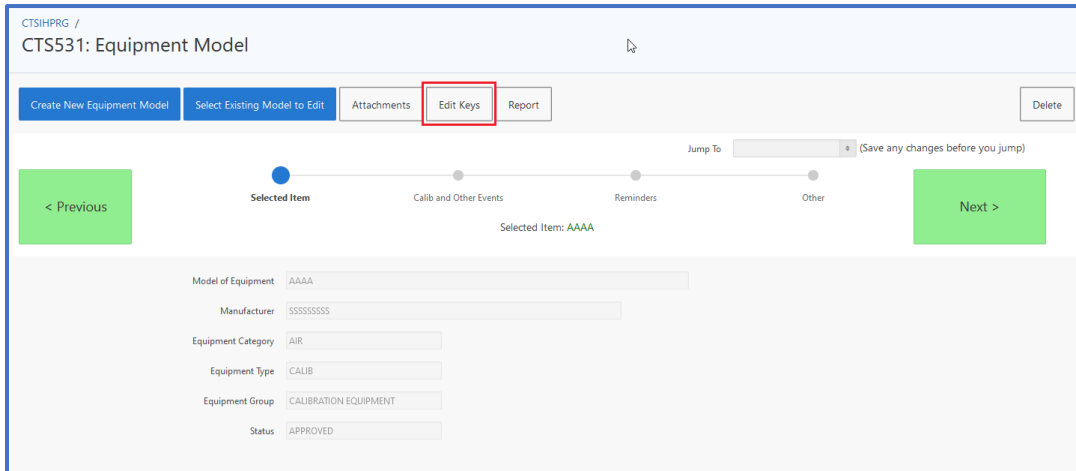
Edit model details.

Click **Save and Continue** button.

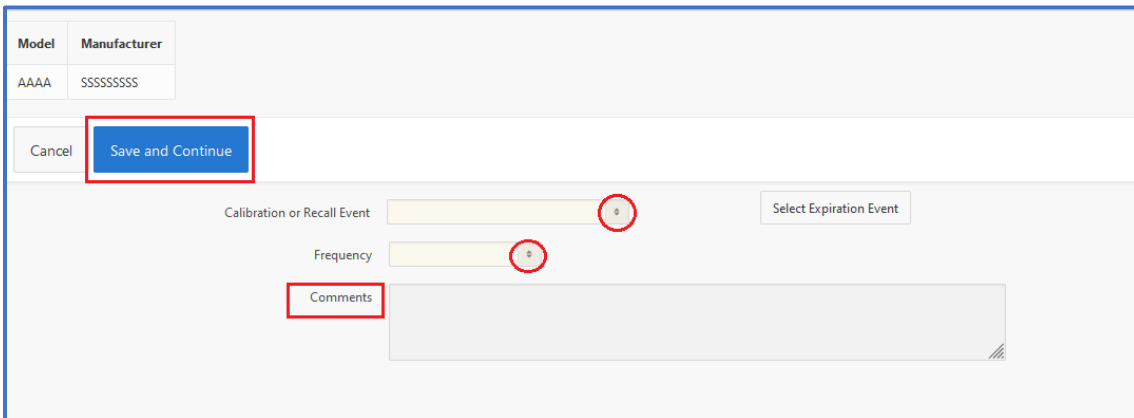On *Selected Item* screen, click **Next** button.

On *Calib and Other Events* screen, click **Add Calibration Requirement** button.
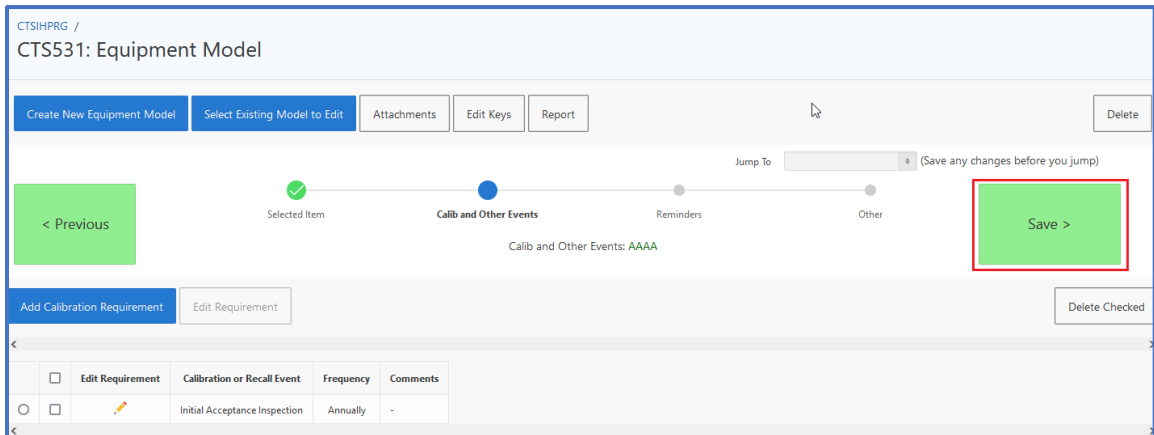

Using pulldown menus, select *Calibration or Recall Event* and *Frequency* options. Enter *Comments* in text area.
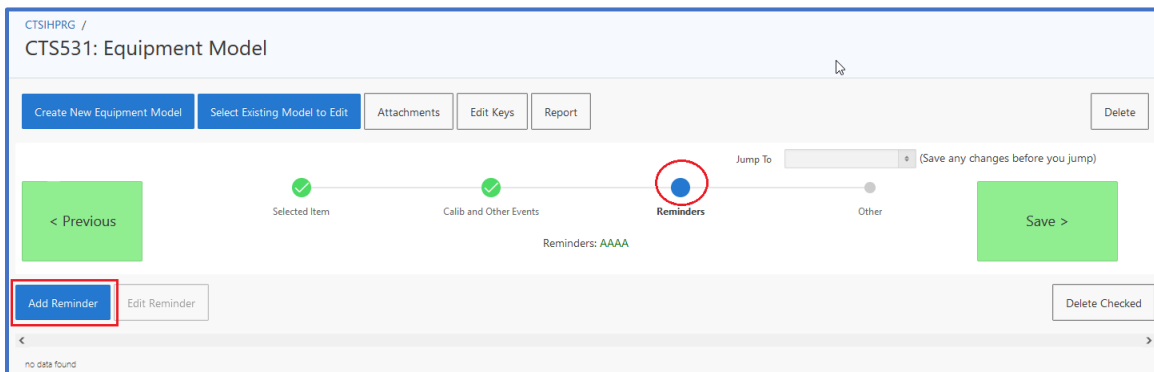
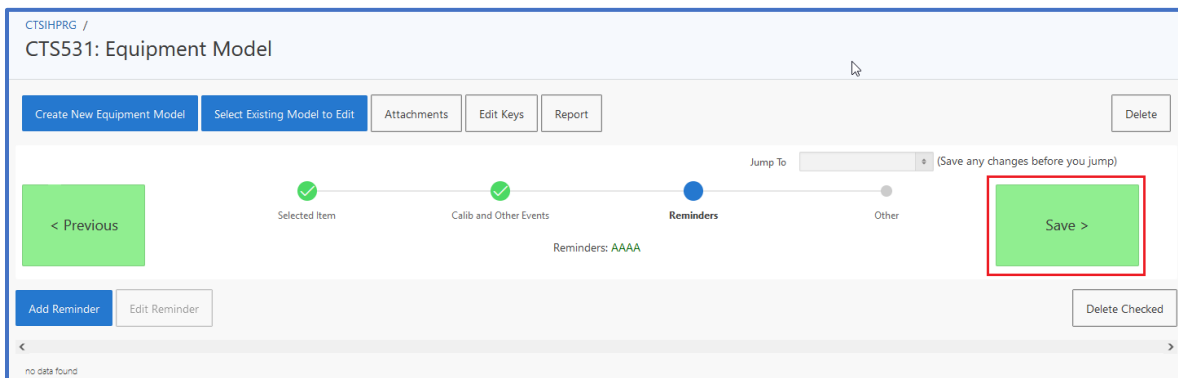Click **Save and Continue** button.
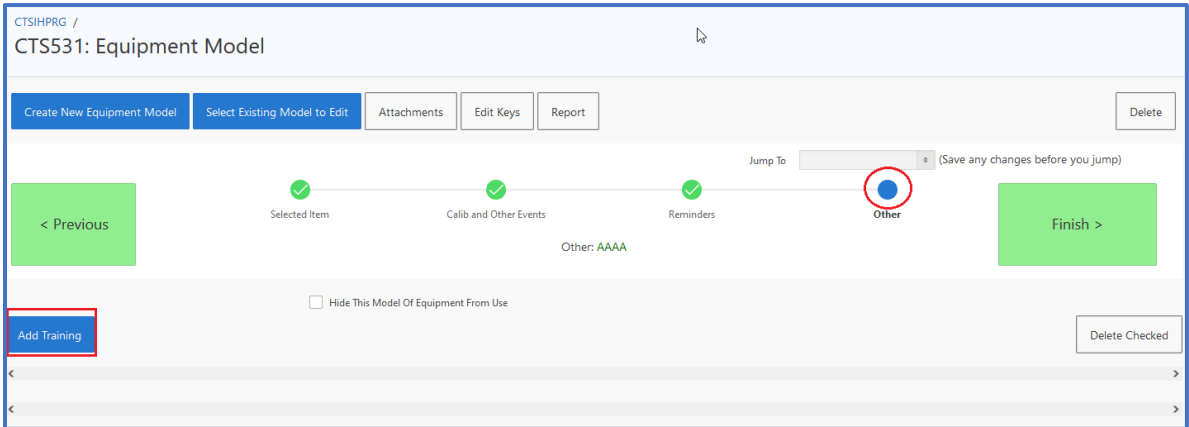
Click **Save** button.

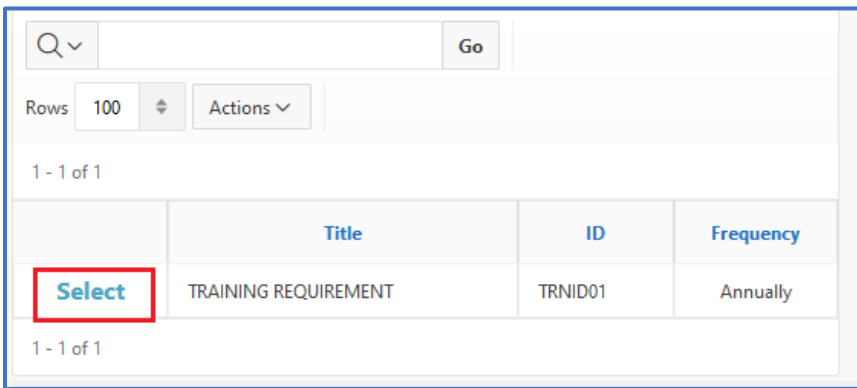On *Reminders* screen, click **Add Reminder** button.
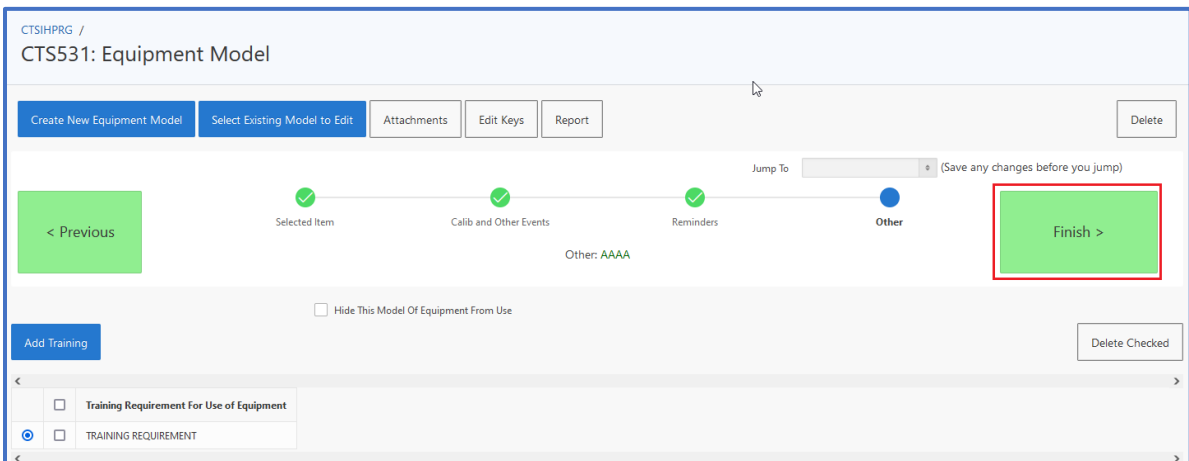

Click **Save** button.

On *Other* screen, click **Add Training** button.

Click blue **Select** text to choose a training requirement.

Click **Finish** button.

Print Equipment Model Report

Select an existing model to edit.

Click *Model of Equipment* hot link to view its report in a new browser tab.

Close browser tab when finished view report.

Delete Equipment Model

Select existing model to edit.
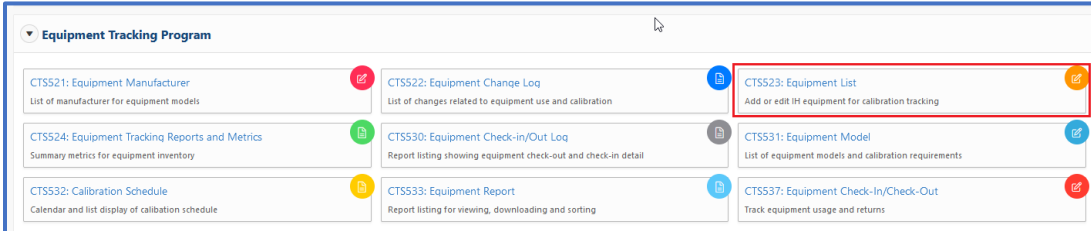
Click **Delete** button.

Click **OK** in alert box to confirm.

Chapter 4 – Equipment List
CTS523: Equipment List
Create New Equipment Entry
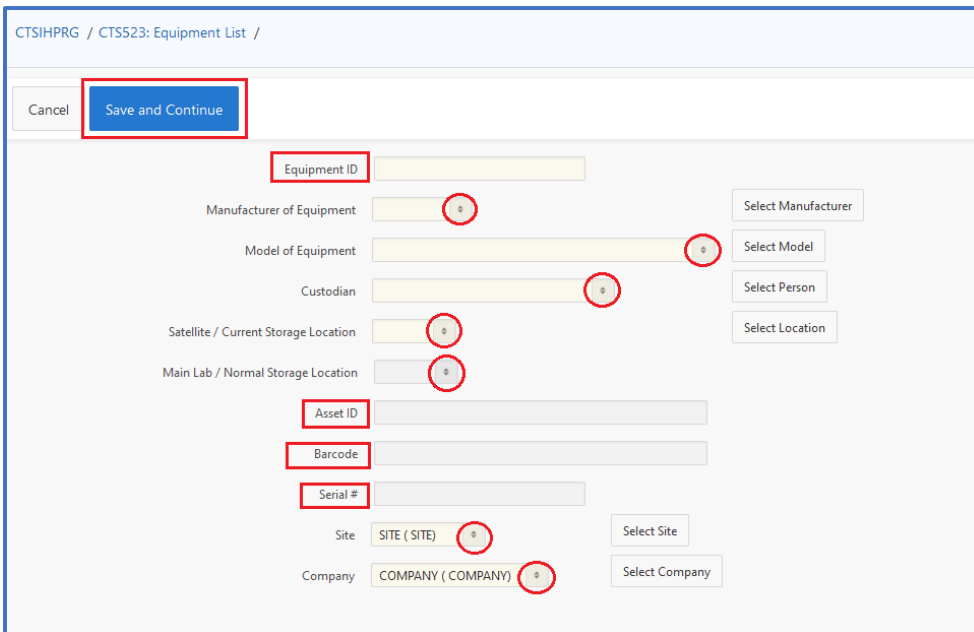
Click **CTS523: Equipment List** button.

Click **Create New Equipment** button.
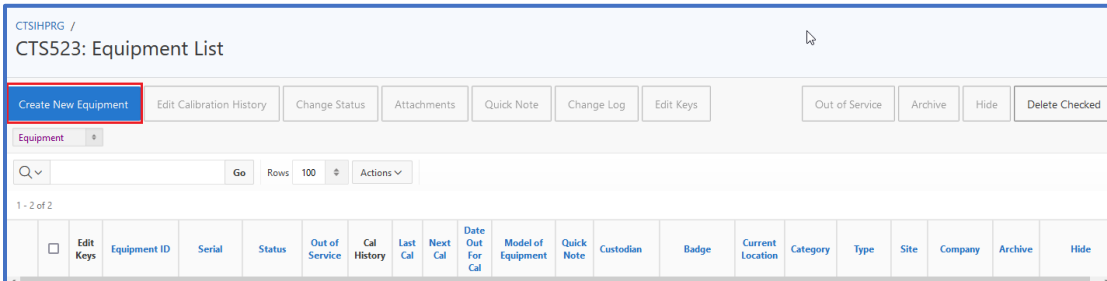
Enter *Equipment ID*, *Asset ID*, *Barcode*, and *Serial #* in text boxes.

Use pulldown menus to select *Manufacturer of Equipment, Model of Equipment, Custodian, Satellite / Current Storage Location, Main Lab / Normal Storage Location, Site*, and *Company* options.

Click **Save and Continue** button.

| Field	Description
Equipment ID	Enter equipment ID.
Manufacturer of Equipment	Select manufacturer of equipment.
Model of Equipment	Select model of equipment.
Custodian	Select person as equipment custodian.
Satellite/Current Storage Location	Enter location where equipment is stored.
Main Lab/Normal Storage Location	Enter location where equipment is normally stored.
Asset ID	Enter asset ID of equipment, if applicable.
Barcode	Enter barcode of equipment.
Serial #	Enter serial number of equipment.
Site	Enter site where equipment is assigned.
Company	Enter company where equipment is assigned.

Edit Existing Equipment Entry

Click radio button to select an equipment record.

Click **Edit Keys** button.

Edit equipment details.

Click **Save and Continue** button.
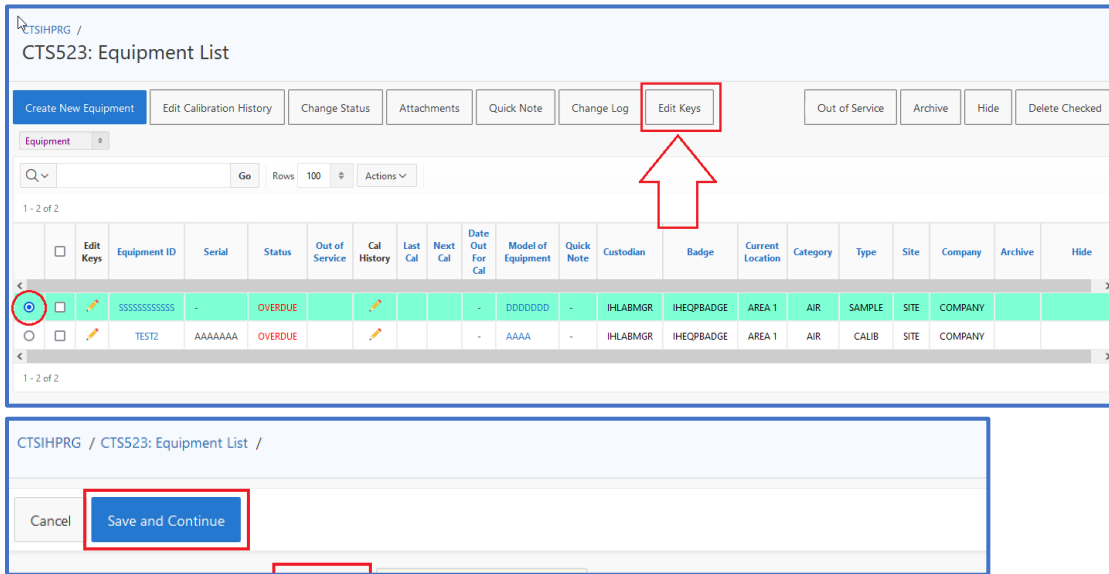
Delete Equipment Entry

Click checkbox to select an equipment record.

Click **Delete Checked** button.

Click **OK** in alert box to confirm.