

HOW TO USE EQUIPMENT SPECS

The purpose of this document is to provide users with the basic understanding of creating customised specification fields in the Equipment Ledger.

This function is used to create a list of detailed specifications against a specific equipment number with the ability to copy the standard specification to other equipment items, categories, types or models.

Software Version: 1701

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EQUIPMENT SPECIFICATIONS

Viewing Specifications

1. From the Menu, select **Equipment Management > Equipment Ledger**
2. Display the relevant equipment record
3. Select **Views > Specs**

Note: This screen can also be accessed from the Menu by selecting **Equipment Management > Configuration > Equipment Make/Model**

The left hand side of the screen is for the groups, the right hand side displays the specifications within the selected group.

Selecting **Show All Specifications** displays all the fields in the grid.

Selecting **Show Only Specifications with a Value** displays only those specs that have a value.

Selecting **Show only Specs with No Value** displays all the specs without a value.

Note: The system may already have some 'existing fields' as they may have already been added at some point.

Adding a New Field

1. From the Menu, select **Equipment Management > Equipment Ledger**
2. Display the relevant equipment record
3. Select **Views > Specs**
4. Click ADD NEW

The groups should be created or added first

For example: Electrical, Fuel Type, Dimensions, etc.

5. Enter the **Name** of the field
 6. Select **Enter a Value** and enter a specific value
- OR
7. Select **Add values from the list** and enter a list of options
 8. Check the **Required** checkbox if this field is mandatory
 9. Select the relevant **Data Member** from the drop down list
 10. Enter a **Sequence** number, if required
 11. Select a **Grouping** from the drop down list.

OR

12. Enter a new group in the **Grouping** field
13. Click OK

For example:

- Specs defined as a list

| GROUPING | NAME | VALUE |
|----------|-----------|----------|
| Fuels | Fuel Type | 2 Stroke |

- Specs defined with a value

| GROUPING | NAME | VALUE |
|----------|-------------|---------|
| Filters | Fuel Filter | P553004 |
| Filters | Air Filter | P182052 |
| Filters | Oil Filter | P550335 |

- Specs defined where value is left blank

| GROUPING | NAME | VALUE |
|------------|--------|-------|
| Dimensions | Width | |
| Dimensions | Length | |
| Dimensions | Height | |

Leaving the values blank creates the 'template' of lines:

1. Select the relevant spec line
2. Click EDIT
3. Edit details as required
4. Click SAVE

Edit an Existing Specification

1. Select the relevant equipment spec
2. Click on the relevant **Grouping**
3. Click EDIT
4. Double click on the relevant **Spec**

This will open the screen for editing.

5. Make the required changes
6. Click OK

This will save the changes made.

Copying Specifications to Other Equipment Items

Once the equipment specifications have been configured for a specific equipment item, the specification details may be copied to other:

- Equipment Categories
- Equipment Models
- Equipment Types
- Equipment Items

1. Select the specs to be copied
2. Select the **Equip** radio button
3. Select the relevant value from the **Copy to Specific** drop down list

For example: Model

This will list the specific categories, manufacturer model, model or type for the value selected in the previous drop down list.

4. Select the relevant value from the next drop down list

Note: If the template has been updated, check the **Overwrite Existing** checkbox.

5. Click COPY

When copied successfully, the system will display a message.

EXPORTING AND IMPORTING USING EXCEL

Specifications can be exported to a spreadsheet. Changes can be made on the spreadsheet and imported into the system.

| FIELD NAME | DESCRIPTION |
|------------------------|--|
| Specs Name only | Creates a template with headings, field name and grouping (no value) |
| Specs Name plus Values | Creates a template with headings, field name and grouping and values |

Exporting

1. Select the specs to be exported by selecting the individual specs or click SELECT ALL
2. Select the required option to export
3. Click EXPORT TO EXCEL on the toolbar

Importing

1. Click IMPORT
2. Navigate to the spreadsheet and select the relevant specs
3. Refresh the *Equipment Specification* screen to view the new imported specs

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