

NEWMOA



EMFACT

Energy & Materials Flow and Cost Tracker

EMFACT Workshop

Introduction to EMFACT

Northeast Waste Management
Officials' Association (NEWMOA)

January 2009



- Introduction to EMFACT
- EMFACT Navigation
- EMFACT Functions
- Case Study
- Hands-on Exercise
- Workshop Feedback



- EMFACT™ is an acronym for Energy & Materials Flow & Cost Tracker
- EMFACT is a product of collaboration between government assistance providers in pollution prevention and other topics relating to sustainability and industrial ecology:
 - Northeast Waste Management Officials' Association (NEWMOA)
 - Massachusetts Office of Technical Assistance and Technology (MA OTA)
- EMFACT is available from NEWMOA as a **free** software tool
 - <http://www.newmoa.org/prevention/emfact/register.cfm>



- The objectives of EMFACT are to provide:
 - A fully developed **easy-to-use well-documented** energy, materials, chemicals use, and associated costs tracking tool
 - Well-developed **training support materials** and a **user's guide** to support the implementation of the tool
 - Online **downloadable free access** to the software application as well as the training materials and user's guide
- The expectations for EMFACT are:
 - EHS and other staff and managers that are using and implementing the tool in their businesses, institutions, and agencies are experiencing **more informed and effective decision-making** concerning energy, materials, and chemical use
 - Well-trained assistance providers in the public and private sector are able to **effectively evaluate** energy, materials, and chemicals use and releases and their associated costs, and potential financial return on investment from prevention and other sustainability activities
 - **Environmental efficiency** results are produced by users of the tool



The EMFACT Team



- **Sponsors:**

- EPA ORD
- NEWMOA
 - Nate Bisbee
 - Andy Bray
 - Terri Goldberg *
- MA OTA
 - David Haas
 - Morgan Mihok
 - Phil Milmoe
 - Rick Reibstein *

- **Consultants:**

- Sullivan
 - Kathy Bates
 - Joan Cianciolo
 - Betsy Cottle
 - Liz Ostwald
- EMARIC
 - Deb Savage

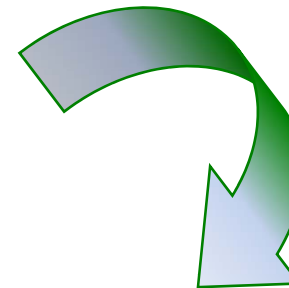
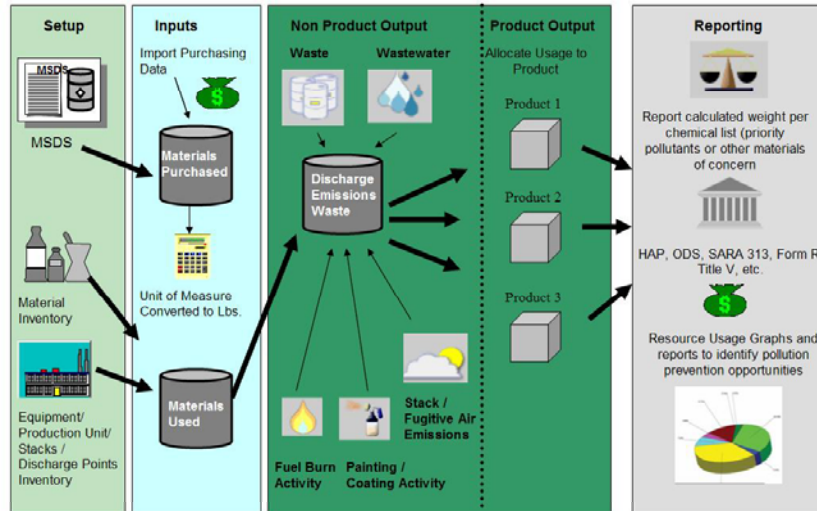
* **Primary managers**



- System Requirements
 - **System Permissions:** User must have ADMIN rights on PC
 - **System Architecture:** Intel (x86) e.g., “PC” (does not operate on Mac or Linux)
 - **Operating System:** 2000 Service Pack 4 or later; Windows 2003 Server; Windows XP Service Pack 1 or later; Windows Vista Business, Enterprise, and Ultimate
 - **Disk Space:** 1.6 GB
 - **RAM:** Minimum 512MB system memory recommended

Introduction to EMFACT

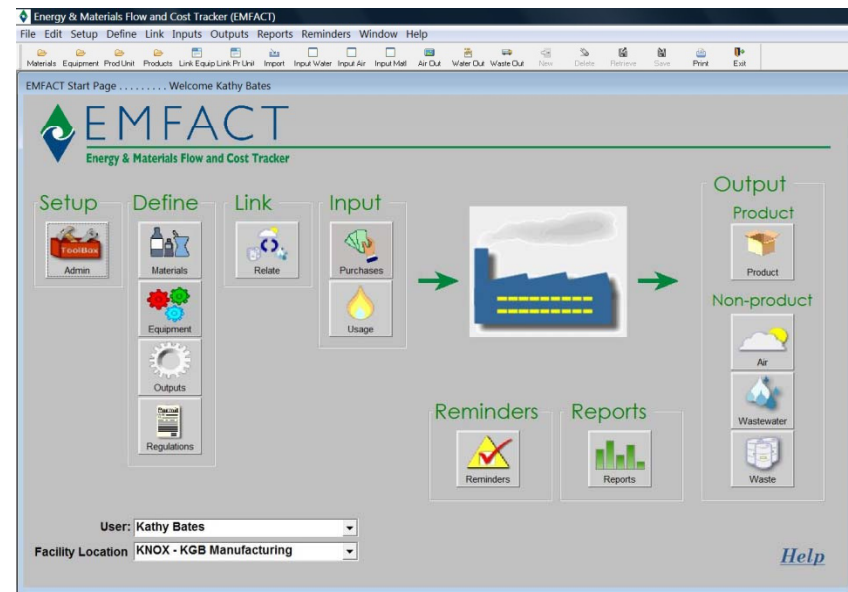
EMFACT Development

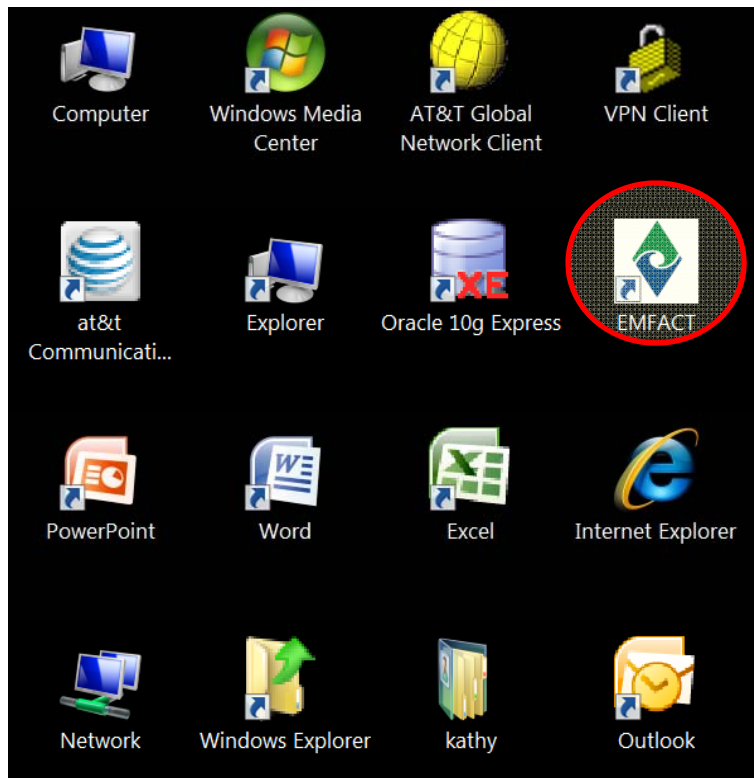


For Phase 1, EMFACT was not designed to enable users to fully track and evaluate all of their energy use, particularly their use and purchasing of electricity.

Conceptual Design

For Phase 1, EMFACT was designed to help users understand and analyze their materials (including water and fuels) and chemical use in one or more facilities. If users choose to use the tool to track fuels, (i.e., oil, natural gas, coal, or bio-based fuels) that they purchase for use in their boilers, the Phase 1 tool has been designed to treat these material inputs the same as others.





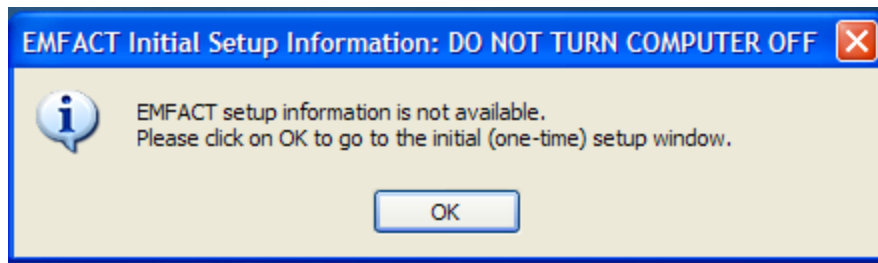
- During the EMFACT Installation, the **EMFACT icon** will be placed on your Windows desktop.
- Click the **icon** to launch EMFACT!



When you first launch EMFACT, an initial setup window will launch letting you know that this is the 1st time use for EMFACT.

After clicking OK, you have an opportunity to define the name of the company, facility, and user for EMFACT.

There is an opportunity later to alter the facility and user information



EMFACT Initial Setup Information

Please fill in the following setup information

Required:

Company Name: Knox - KGB Manufacturing

Facility Location Code: KNOX

Facility Location Name: Knoxville

User ID: KATHY User Type: Basic

User Name: Kathy Bates

OK

EHS004



System Connect Status

Connecting to database...

CONNECTING

Please wait while the database is connecting...
EMFACT is powered by EHS Solutions, Sullivan International Group.
See <http://www.onesullivan.com>.

Sponsoring Organizations:



After the initial launch of EMFACT, each additional time EMFACT is launched, a startup screen will appear for a few seconds with the logos of the sponsoring organizations (NEWMOA and MA OTA) and the consultants that developed the EMFACT product (Sullivan and EMARIC)

EMFACT Navigation



Menu paths are provided for all windows

Clicking an **icon** or **menu path (toolbar)** will open a new window for the indicated functionality

The screenshot displays the EMFACT software interface. At the top, a menu bar includes File, Edit, Setup, Define, Link, Inputs, Outputs, Reports, Reminders, Window, and Help. Below the menu bar is a toolbar with icons for Materials, Equipment, Prod Unit, Products, Link Equip, Link Pr, Unit, Import, Input Water, Input Air, Input Mail, Air Out, Water Out, Waste Out, New, Delete, Retrieve, Save, Print, and Exit. The main workspace contains several functional areas: Setup (Admin), Define (Materials, Equipment, Outputs, Regulations), Link (Relate), Input (Purchases, Usage), and Output (Product). A red box highlights the 'Equipment' icon in the Define section. A second red box highlights the 'Define' menu item in the menu bar, which is open to show a sub-menu with options: Materials, Equipment, Outputs, and Regulations. The 'Equipment' option is further expanded to show 'Equipment List', 'Equipment Detail', 'Production Unit List', and 'Production Unit Detail'. At the bottom left, a blue oval highlights two drop-down lists: 'User: Kathy Bates' and 'Facility Location: KNOX - KGB Manufacturing'. A red arrow points from the top-left window title bar area towards the main interface.

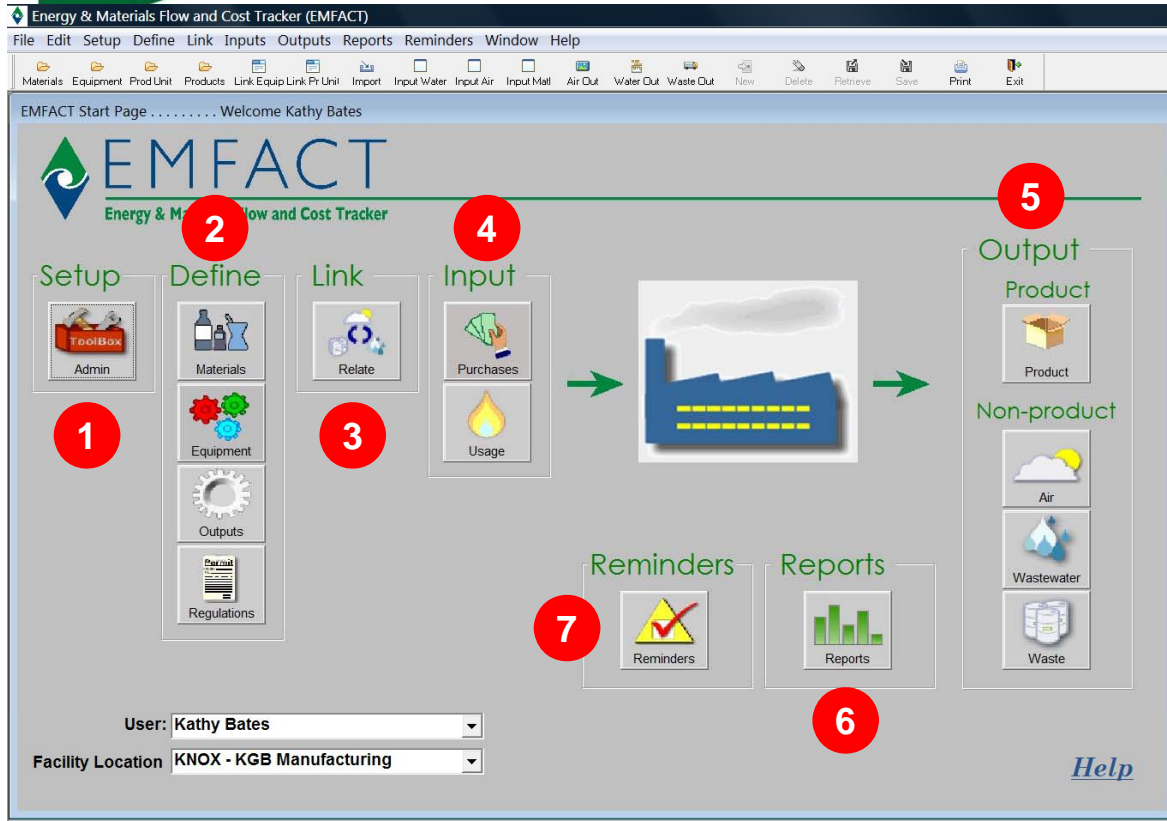
Select **User** and **Facility Location** from drop down lists on the EMFACT **Home** page

EMFACT Navigation



EMFACT

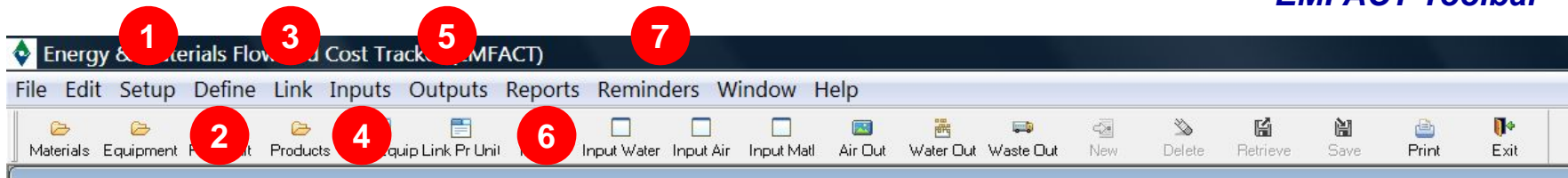
Energy & Materials Flow and Cost Tracker



The EMFACT **Dashboard** displays seven distinct areas of functionality accessed via **icons** or **Toolbar** menus:

1. Setup
2. Define
3. Link
4. Input
5. Output
 - Product
 - Non-product
6. Reports
7. Reminders

EMFACT Toolbar



EMFACT Navigation

Click icon or toolbar menu to access functionality



The screenshot shows the EMFACT software interface. At the top is a menu bar with options: File, Edit, Setup, Define, Link, Inputs, Outputs, Reports, Reminders, Window, Help. Below the menu bar is a toolbar with icons for Materials, Equipment, Prod Unit, Products, Link Equip, Link Pr Unit, Import, Input Water, Input Air, Input Matl, Air Out, Water Out, Waste Out, New, Delete, Retrieve, Save, Print, and Exit. The main window displays the EMFACT logo and the text 'Energy & Materials Flow and Cost Tracker'. Below this is a central area with a factory icon and arrows pointing to 'Setup', 'Define', 'Link', 'Input', and 'Output' sections. The 'Setup' section is highlighted with a red circle containing the number '1'. The 'Setup' section includes icons for Admin, Materials, Equipment, Outputs, and Regulations. The 'Define' section includes icons for Materials, Equipment, and Outputs. The 'Link' section includes an icon for 'Relate'. The 'Input' section includes icons for 'Purchases' and 'Usage'. The 'Output' section includes icons for 'Product', 'Non-product', 'Air', 'Wastewater', and 'Waste'. Below the main window is a status bar showing 'User: Kathy Bates' and 'Facility Location: KNOX - KGB'. A 'Setup' menu is open, showing options: Users, Drop Down Lists, Facility Locations, Buildings, Departments, and System Utilities. A red circle with the number '1' is placed over the 'Setup' menu icon in the toolbar.

1 SETUP

Manage **User** information

Maintain the “**Drop Down**” lists found throughout the application

Maintain **Facility** information, and add your facility's **Buildings** and **Departments**

System Utilities are provided to assist you in backup and restore of the EMFACT Oracle Express database

Click icon or toolbar menu to access functionality



EMFACT

Energy & Materials Flow and Cost Tracker

The screenshot displays the EMFACT software interface. At the top, there is a menu bar with options: File, Edit, Setup, Define, Link, Inputs, Outputs, Reports, Reminders, Window, Help. Below the menu bar is a toolbar with icons for Materials, Equipment, Prod Unit, Products, Link Equip, Link Pr Unit, Import, Input Water, Input Air, Input Matl, Air Out, Water Out, Waste Out, New, Delete, Retrieve, Save, Print, and Exit. A red circle with the number '2' highlights the 'Define' menu item in the menu bar and the 'Define' icon in the toolbar. The 'Define' menu is open, showing sub-menus for Materials, Equipment, Outputs, and Regulations. The 'Equipment' sub-menu is further expanded, showing options for Equipment List, Equipment Detail, Production Unit List, and Production Unit Detail. The main workspace shows a central diagram of a factory with arrows indicating flow. On the left, there are panels for Setup (Admin), Define (Materials, Equipment, Outputs, Regulations), Link (Relate), and Input (Purchases, Usage). On the right, there are panels for Output Product (Product) and Non-product (Air, Wastewater). At the bottom, there is a status bar with 'User: Kathy Bates' and 'Facility Location: KNOX - KGB Man'. A red circle with the number '2' also highlights the 'Define' icon in the bottom toolbar.

2 DEFINE

Maintain required details related to **Materials** including Chemical Abstract Society (CAS) number listing, chemical constituents, synonyms / aliases, and container sizes

Maintain details related to **Equipment** including Production Units

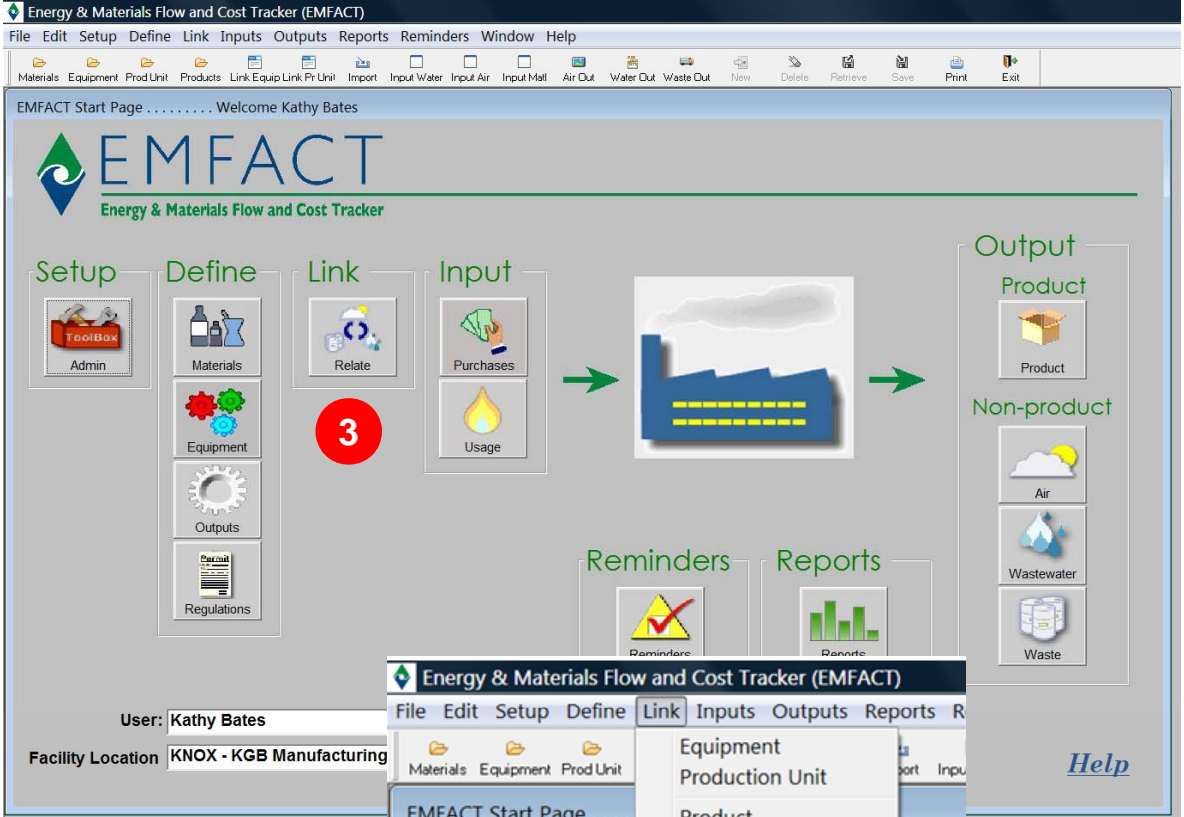
Maintain details related to **Outputs** including products, air emission sources, discharge points, and waste types

Maintain **Regulations** including relevant permits, orders, registrations, or certificates

EMFACT Toolbar

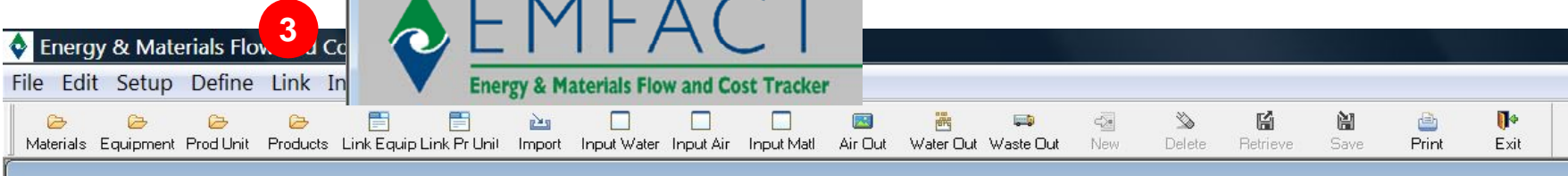
EMFACT Navigation

Click icon or toolbar menu to access functionality



3 LINK

The LINK windows allow you to describe the various inputs and outputs associated with **Equipment, Production Units, and Products**



EMFACT Toolbar

EMFACT Navigation

Click icon or toolbar menu to access functionality



EMFACT

Energy & Materials Flow and Cost Tracker

The screenshot displays the EMFACT software interface. At the top, there is a menu bar with options: File, Edit, Setup, Define, Link, Inputs, Outputs, Reports, Reminders, Window, Help. Below the menu bar is a toolbar with icons for Materials, Equipment, Prod Unit, Products, Link Equip Link Pr Unit, Import, Input Water, Input Air, Input Mail, Air Out, Water Out, Waste Out, New, Delete, Retrieve, Save, Print, and Exit. The main window shows the 'EMFACT Start Page' with a central graphic of a factory. To the left of the factory are four main functional areas: Setup (Admin), Define (Materials, Equipment, Outputs, Regulations), Link (Relate), and Input (Purchases, Usage). The 'Input' area is highlighted with a red circle containing the number '4'. To the right of the factory are 'Output' categories: Product (Product) and Non-product (Air, Wastewater, Waste). Below the main window, there is a user selection dropdown (User: Kathy Bates) and a facility location dropdown (KNOX - KGB Manufacturing). A secondary screenshot shows the 'Inputs' menu open, with 'Materials Purchased' and 'Material Usage' options. The 'Materials Purchased' option is highlighted with a red circle containing the number '4'. The bottom of the image shows a detailed view of the toolbar, with the 'Input' icon highlighted by a red circle containing the number '4'.

4 INPUT

Input **Purchases** (purchased materials) through an electronic file or enter this data manually

Input **Usage** (material usage) for estimated chemicals, materials, water, and fuel

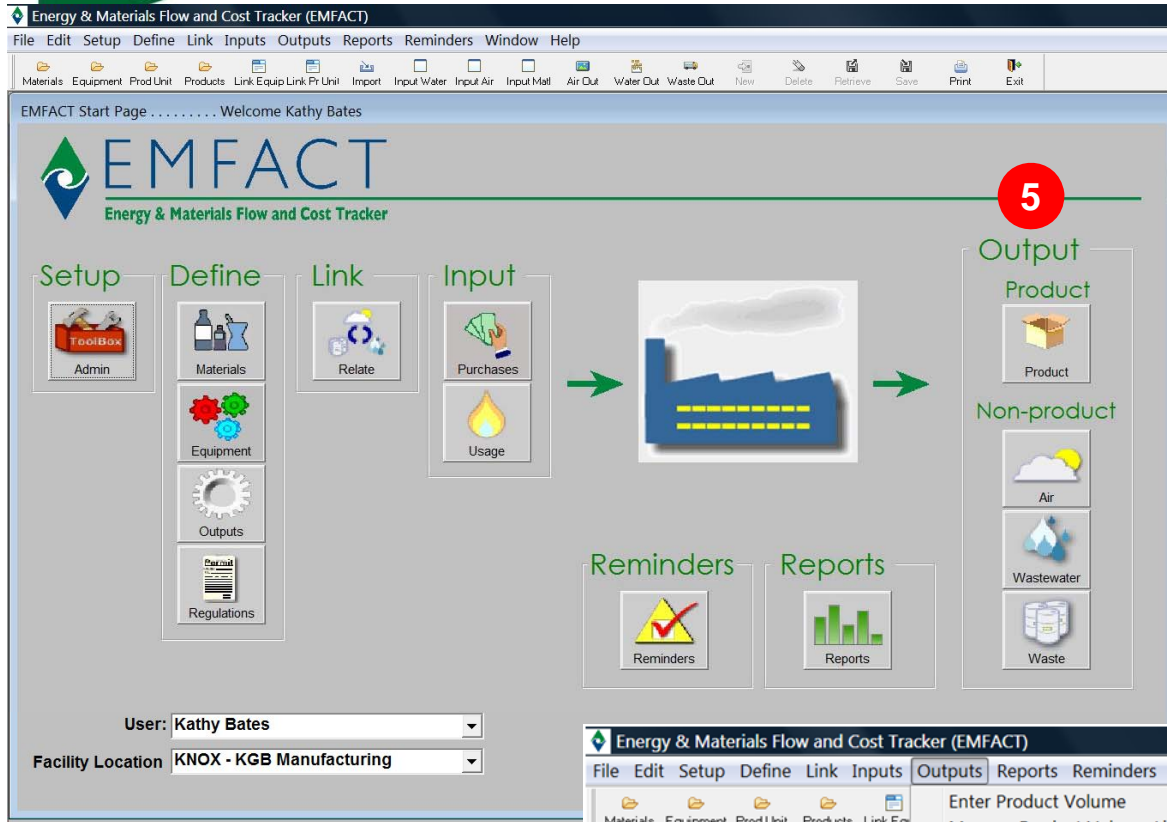
EMFACT Navigation

Click icon or toolbar menu to access functionality



EMFACT

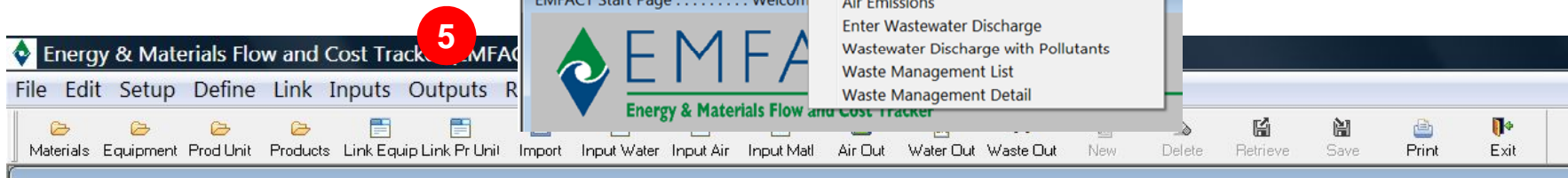
Energy & Materials Flow and Cost Tracker



5 OUTPUT

Allocate intermediate **Products** to material data

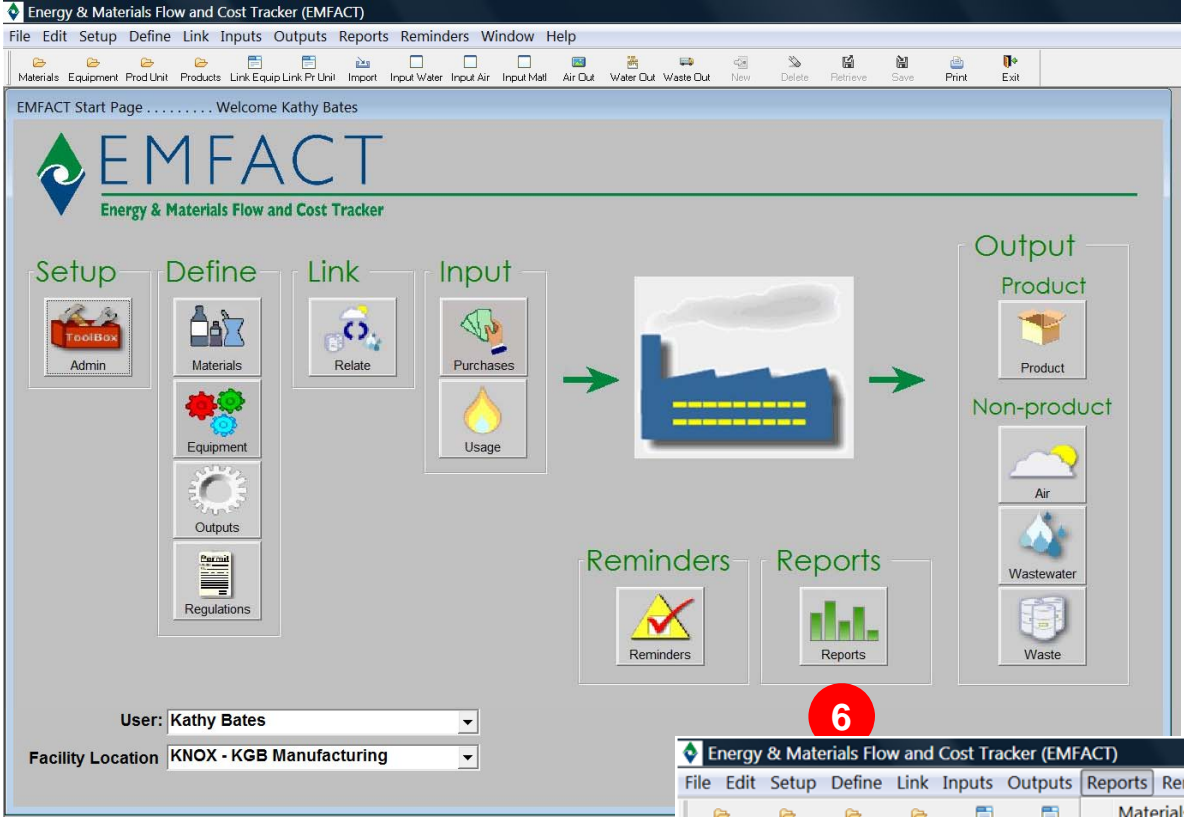
Document **Non-product** output (air, wastewater and waste) for paint & fuel (air) emissions, wastewater discharge, and details related to waste shipments



EMFACT Toolbar

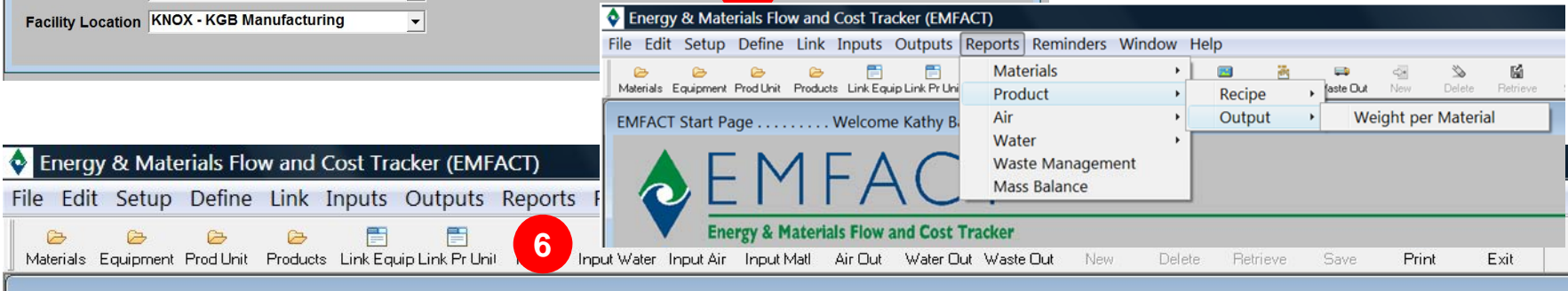
EMFACT Navigation

Click icon or toolbar menu to access functionality



6 REPORTS

EMFACT provides a variety of reports related to **Materials, Products, Air, Water, Waste** and produces a **Mass Balance** report

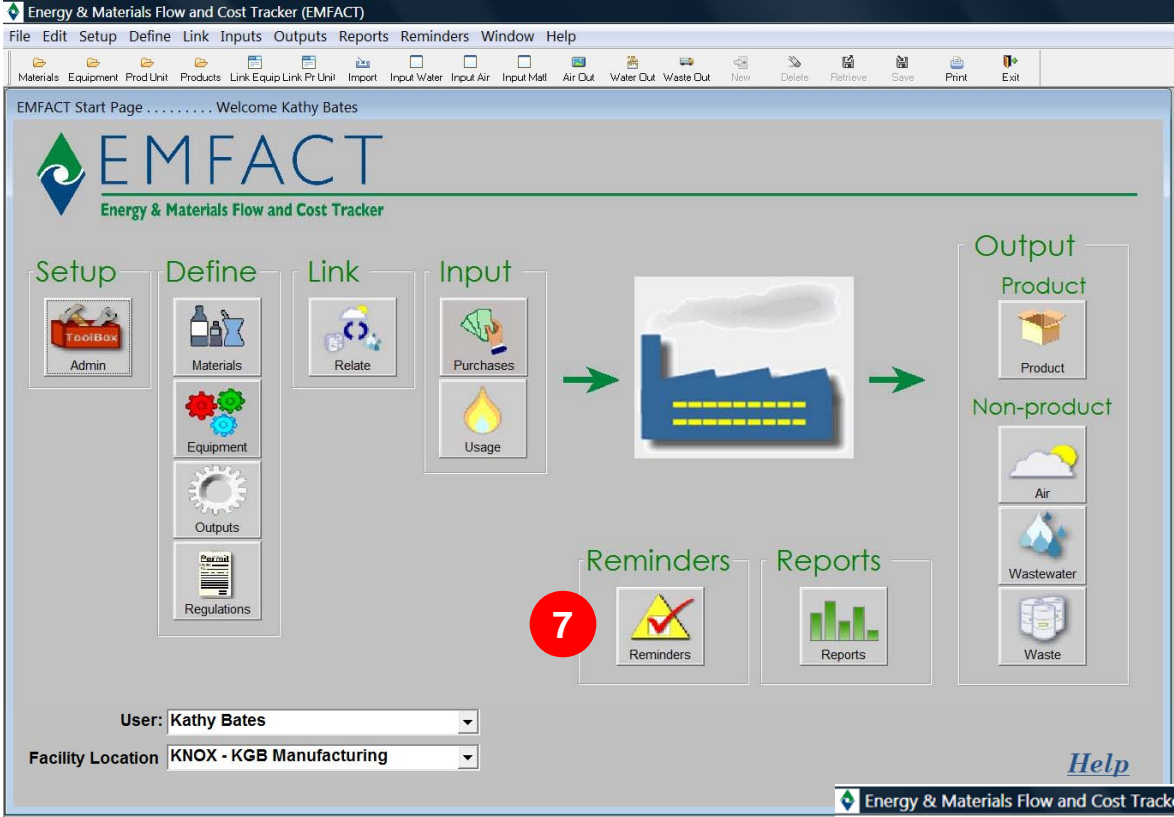


EMFACT Toolbar

EMFACT Navigation

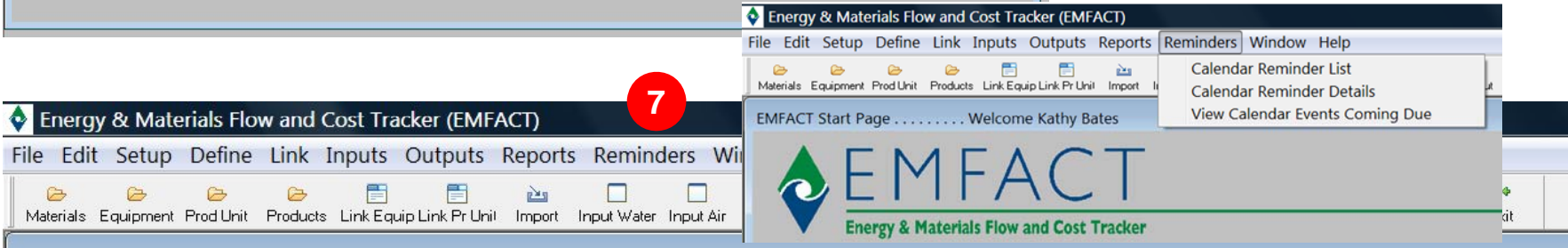
NEWMOA

Click icon or toolbar menu to access functionality

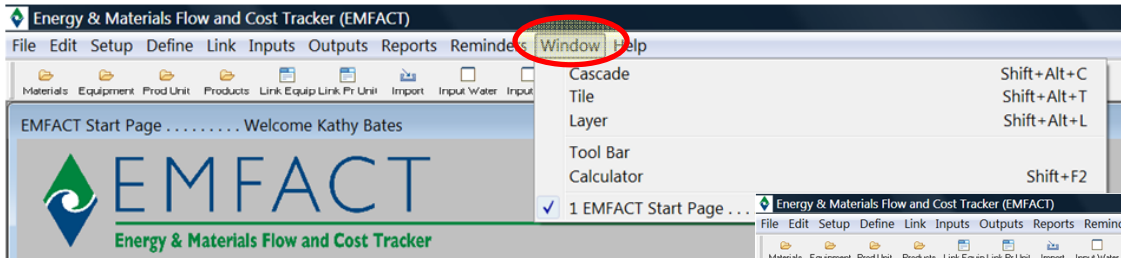
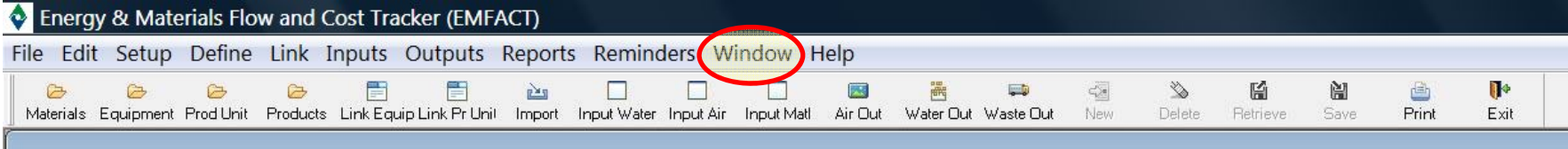



7 REMINDERS


The **Reminders** menu allows you to setup and view calendar events



EMFACT Toolbar

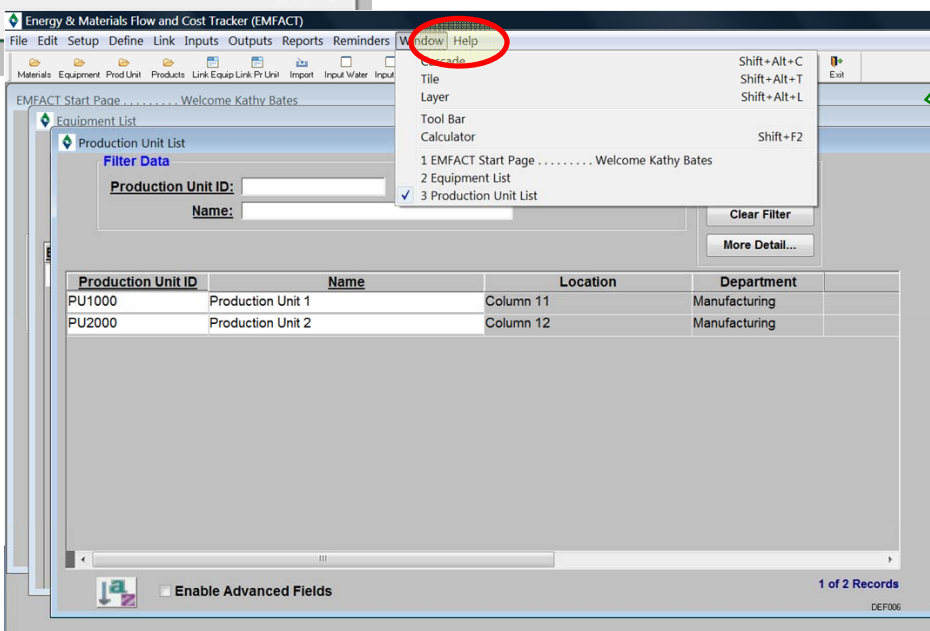


Example – multiple EMFACT windows open shown as “Cascade” with the active window indicated

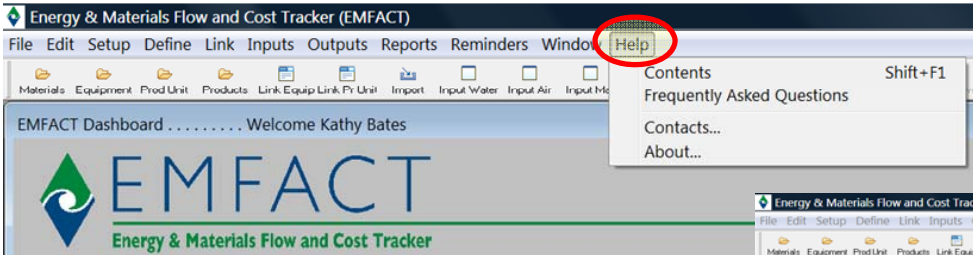
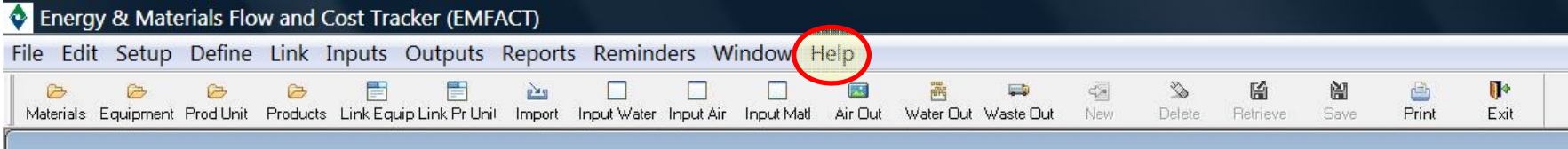


Toolbar - Windows

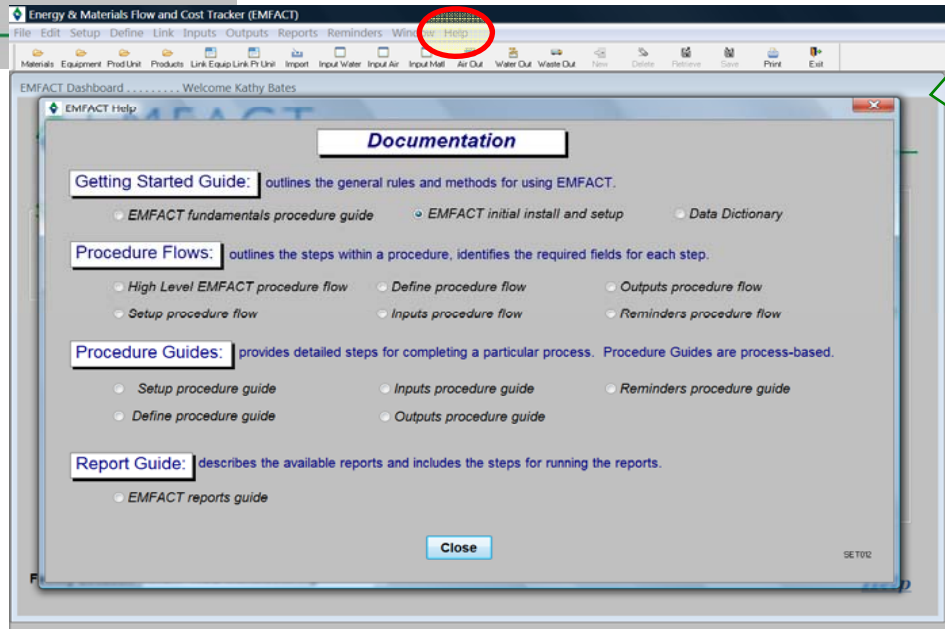
The **Windows** menu on the Toolbar provides normal “windows” functionality to manage window displays (e.g., select active window, Toolbar position, display as Cascade, Tile, Layer, etc.)



EMFACT Navigation

Example – “Contents” displays EMFACT documentation; click the button next to the documentation to view, print, or download (Adobe PDF)



Toolbar - Help

Help menu on the Toolbar provides access to various EMFACT help resources



Energy & Materials Flow and Cost Tracker (EMFACT)

File Edit Setup Define Link Inputs Outputs Reports Reminders Window Help

Materials Equipment Prod Unit Products Link Equip Link Pt Unit Import Input Water Input Air Input Mail Air Out Water Out Waste Out New Delete Retrieve Save Print Exit

EMFACT Dashboard Welcome Sample Advanced User

EMFACT Help

Documentation

Getting Started Guide: outlines the general rules and methods for using EMFACT.

- EMFACT fundamentals procedure guide
- EMFACT initial install and setup
- Data Dictionary

Procedure Flows: outlines the steps within a procedure, identifies the required fields for each step.

- High Level EMFACT procedure flow
- Define procedure flow
- Outputs procedure flow
- Setup procedure flow
- Inputs procedure flow
- Reminders procedure flow

Procedure Guides: provides detailed steps for completing a particular process. Procedure Guides are process-based.

- Setup procedure guide
- Inputs procedure guide
- Reminders procedure guide
- Define procedure guide
- Outputs procedure guide

Report Guide: describes the available reports and includes the steps for running the reports.

- EMFACT reports guide

Close

SET012

Help

- Contents Shift+F1
- Frequently Asked Questions
- Contacts...
- About...

Help

EMFACT contains extensive step-by-step documentation for **all** of the features and functionality you have seen in this workshop today

Select **Contents** to open the Documentation window

Simply click a button next to the document you wish to open

EMFACT Navigation



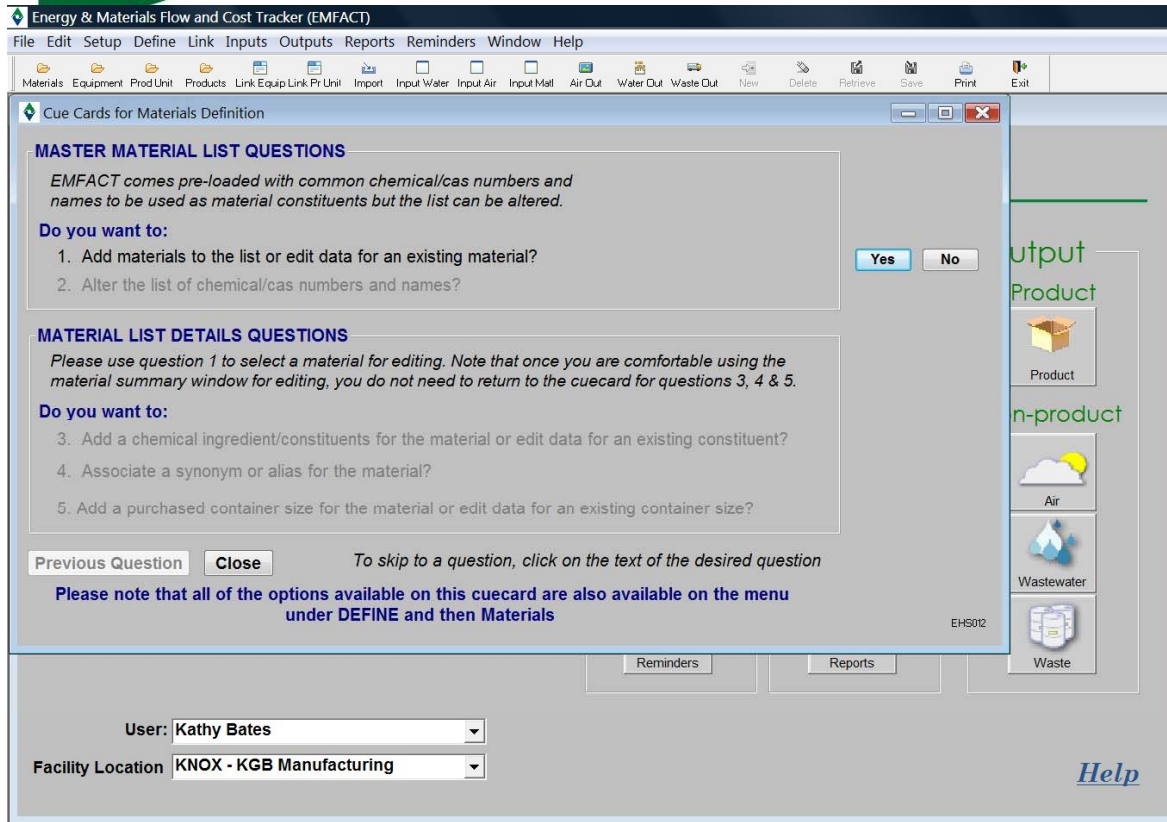
Help

An Adobe PDF viewer window will open with the selected document

From here, you can view the document in Adobe, print the document, or save the document to your computer or network

We strongly encourage you to review the EMFACT documentation for each step in the EMFACT process as you are using EMFACT for the first time

The screenshot displays the Adobe Acrobat Standard interface. The title bar shows the file name 'pf_emf_define.p' and the application name 'Adobe Acrobat Standard'. The menu bar includes 'File', 'Edit', 'View', 'Document', 'Comments', 'Forms', 'Tools', 'Advanced', 'Window', and 'Help'. The toolbar contains options like 'Create PDF', 'Combine Files', 'Export', 'Start Meeting', 'Secure', 'Sign', and 'Review & Comment'. The main content area shows the 'EMFACT Master Data Source Definitions - Procedure Flow' document. The document is organized into six numbered sections: 1. Define Materials, 2. Define Equipment, 3. Define Outputs, 4. Define Regulations (optional), 5. Link Equipment/Prod Unit Inputs & Outputs, and 6. Link Product. A red box highlights the file name 'pf_emf_define.p' in the top-left corner, and a red arrow points from this box to the document's title bar.



“**Cue Cards**” are provided for the user to guide them through the logical series of tasks associated with EMFACT windows

Cue Cards are displayed when you click a **dashboard** icon

To access a window **without** using Cue Cards, select the desired functionality from the **Toolbar** menus

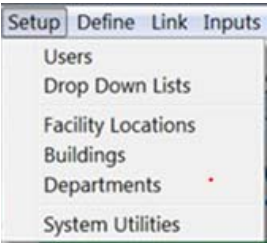
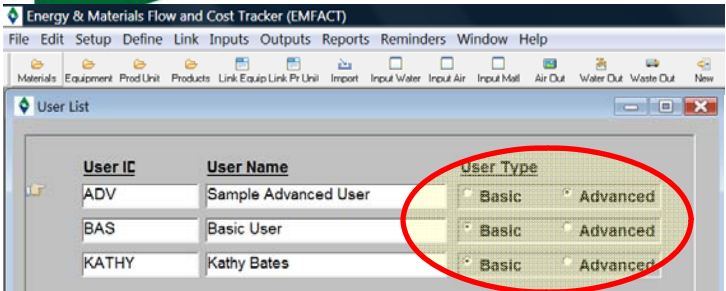
Each Cue Card contains a series of questions. Users click **Yes** or **No** to the questions. When answering **Yes**, the appropriate EMFACT window will display. If answering **No**, the prompt advances to the next question.



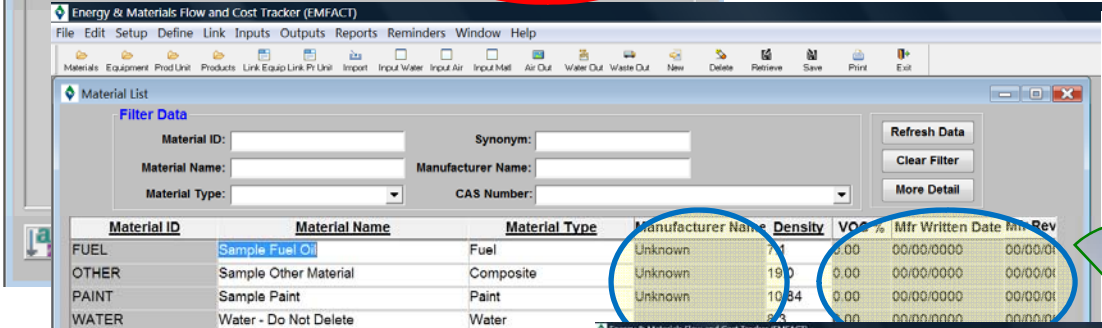
Let's try EMFACT now....

- Logon
- Complete the Initial Setup
- Click through the Menu Options
- Try out some Cue cards
- Check out the HELP

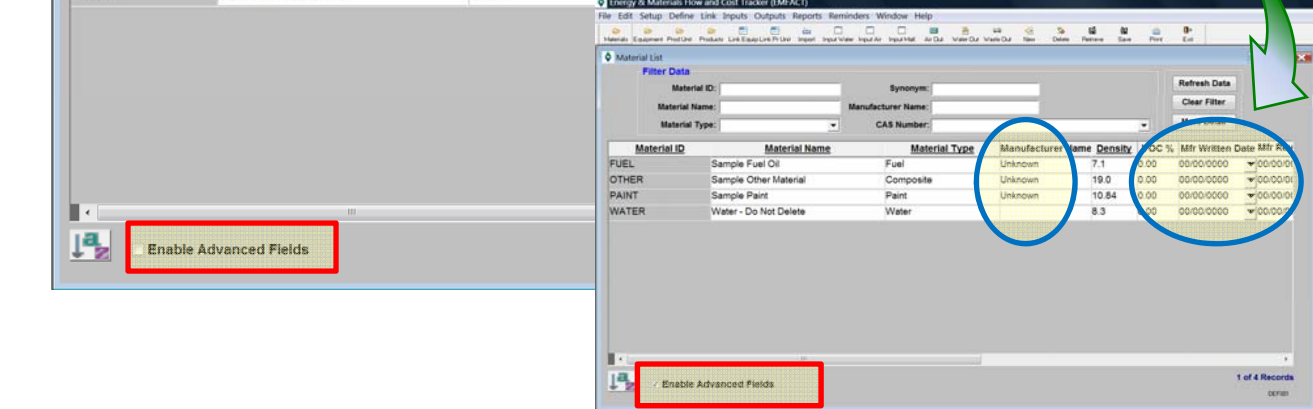
NEWMOA EMFACT Navigation



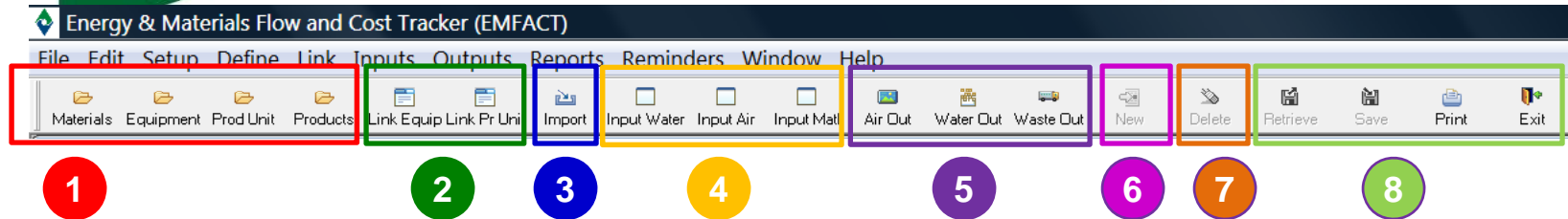
Access **Setup** → **Users** to indicate if a user has a **Basic** or **Advanced** permission level as a default



Advanced users have access to more data entry fields. **Basic** users default to less data entry fields



Click the **Enable Advanced Fields** checkbox and the additional data entry fields will change from gray to white

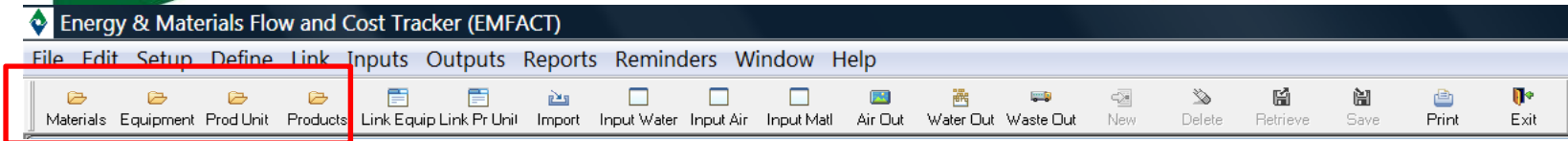


Moving from left to right, the Toolbar icons are presented as groups or individual icons.

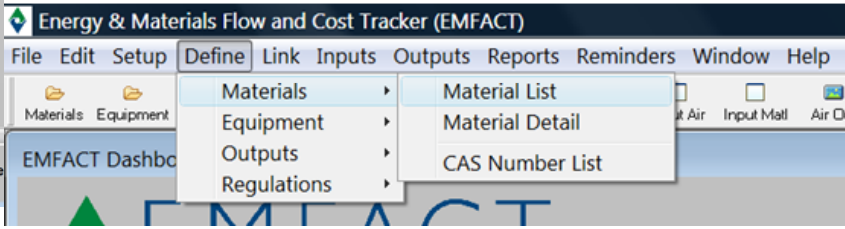
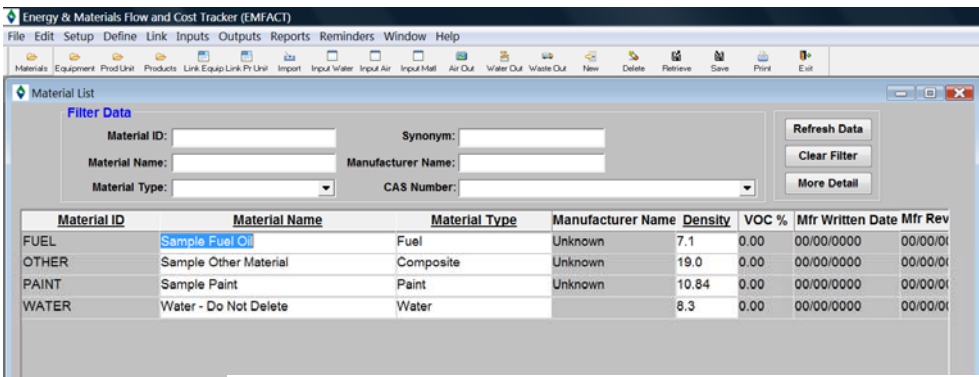
- 1. Search Folder
- 2. Link
- 3. Import
- 4. Input
- 5. Out
- 6. New
- 7. Delete
- 8. Common Functions

The EMFACT **Toolbar** is similar to toolbars in other applications in that it provides shortcuts to common functions (e.g., save and delete)

In addition, this toolbar provides shortcuts to commonly-used windows



1 Click the **Materials** folder to directly open the **Materials List** window



The alternative menu path is displayed above
Define → Materials → Material List

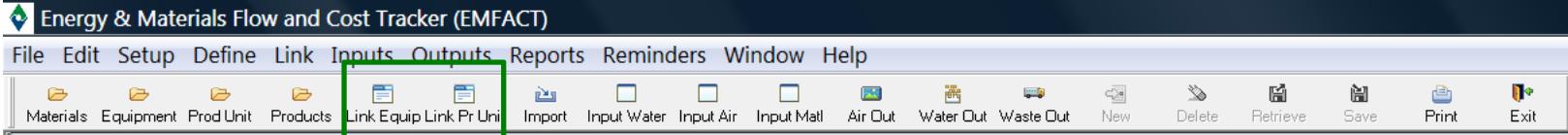
Clicking the **Materials** button under the **Define** column on the **Home** page will open the **Materials List Cue Card**

Search Folder Buttons

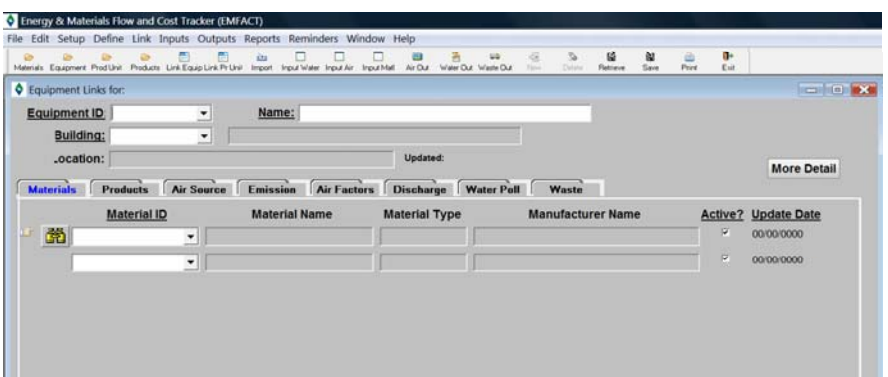
Clicking one of the yellow folder icons will open the corresponding **List** window (*Materials List, Equipment List, Production Unit List, Product List*) for that item

The windows are used to maintain a list of materials, equipment, production units, and products for each Facility

Note: Each **Facility** has its own set of lists. The active **Facility** is the **Facility** indicated on the **Home** page.



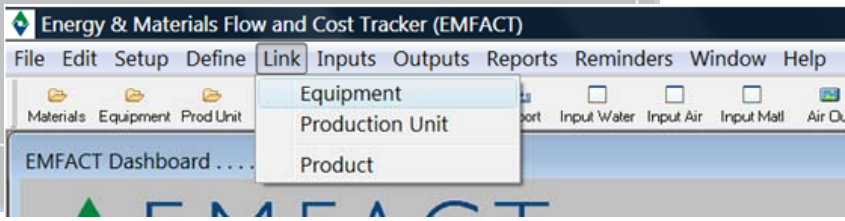
2 Click the **Link Equip** folder to directly open the **Equipment Links** window



Link Buttons

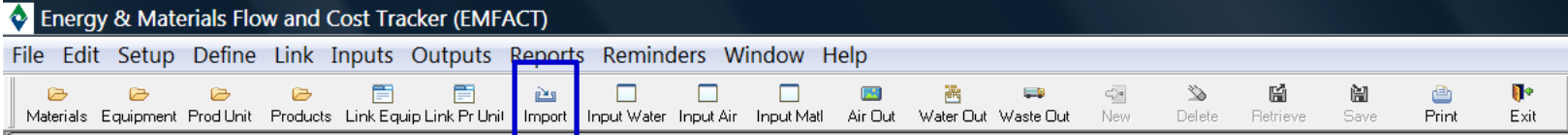
Clicking the **Link Equip** button or **Link Pr Unit** button opens the *Equipment Links* window or *Production Unit Links* window

These windows are used to characterize your equipment and production units by **linking** related materials, products, air sources, emission sources, pollutants, and waste types



The alternative menu path is displayed above **Link → Equipment**

Clicking the **Relate** button under the **Link** column on the **Home** page will open the **Link Equipment and Production Units Cue Card**



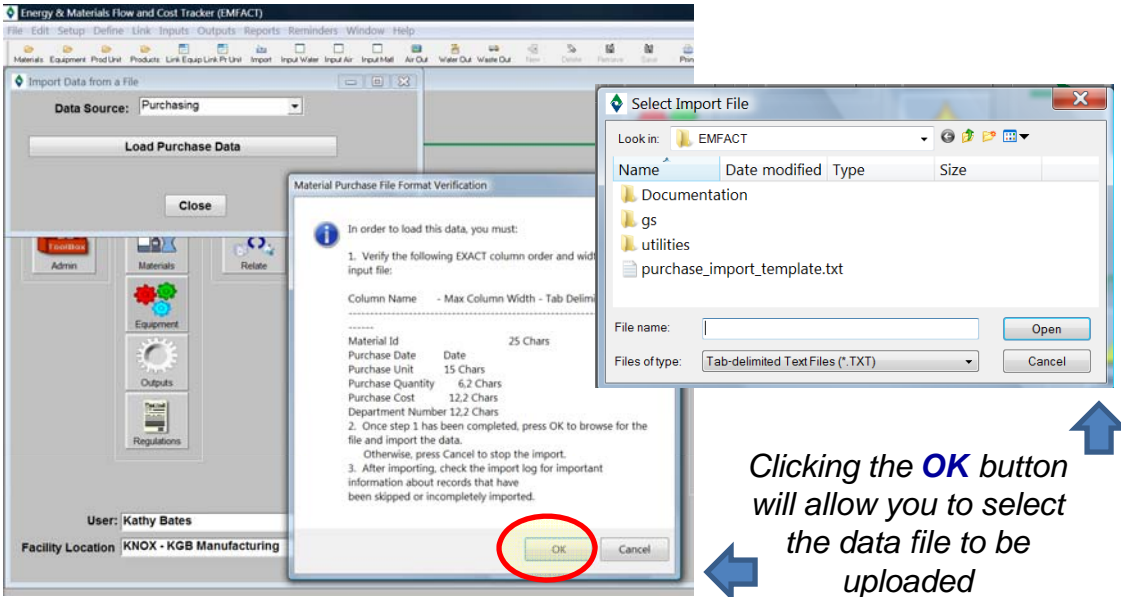
3 Click the **Import** button to directly open the **Import Data from a File** window

Import Button

Clicking on the **Import** button opens the **Import Data from a File** window

This window is used for importing electronic files of **materials purchased** data

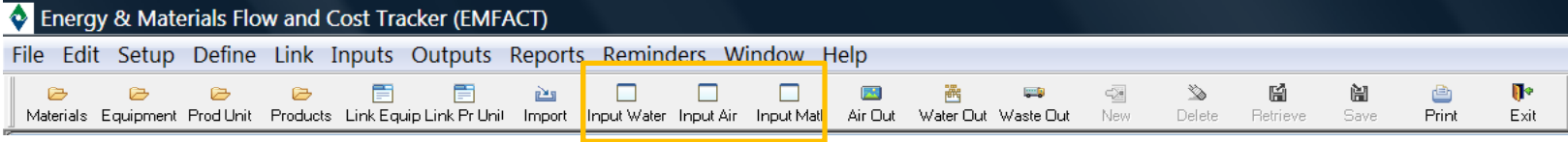
Note: An import **template** (Excel) for materials purchased data is provided with EMFACT.



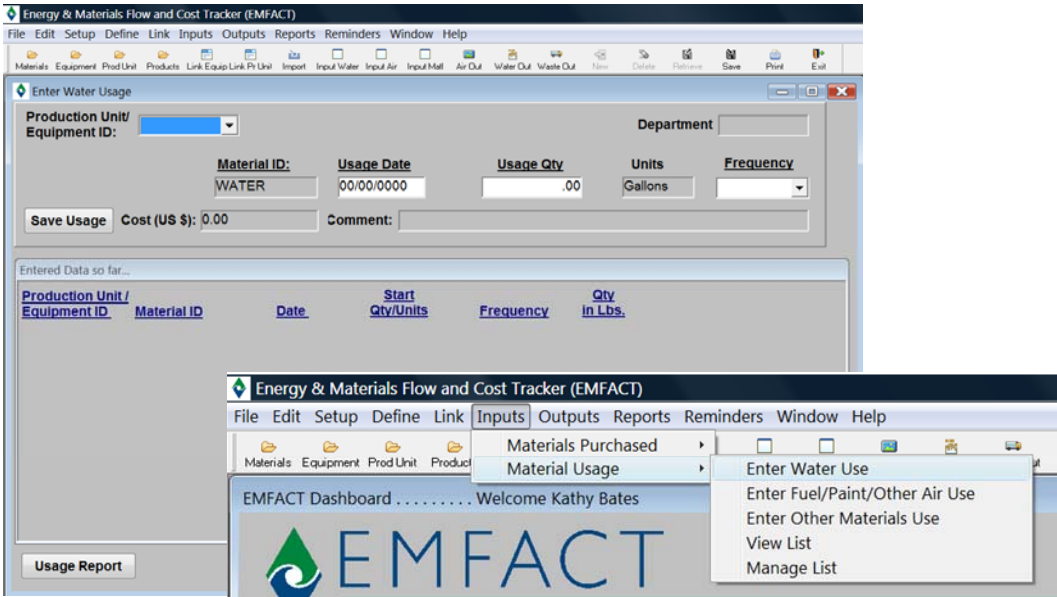
Clicking the **OK** button will allow you to select the data file to be uploaded



Clicking the **Purchases** button under the **Input** column on the **Home** page will open the **Import Data from a File** window

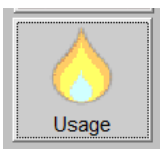


Click the **Input Water** button to directly open the **Enter Water Usage** window 4



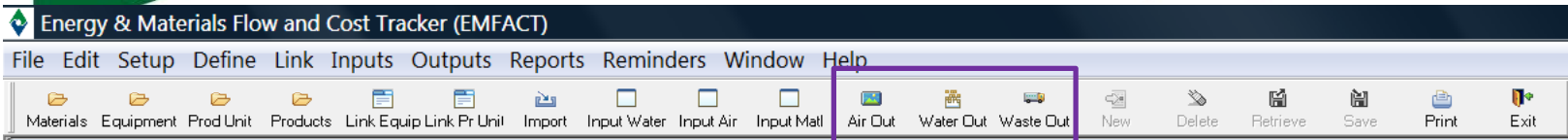
Input Buttons

Clicking one of the **Input** buttons opens the corresponding data entry window (*Enter Water Usage, Enter Material Usage, Enter Material Usage with Air Emissions*) for entering usage



The alternative menu path is displayed above **Inputs → Material Usage → Enter Water Use**

Clicking the **Usage** button under the **Input** column on the **Home** page will open the **Materials Usage Cue Card**

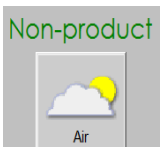
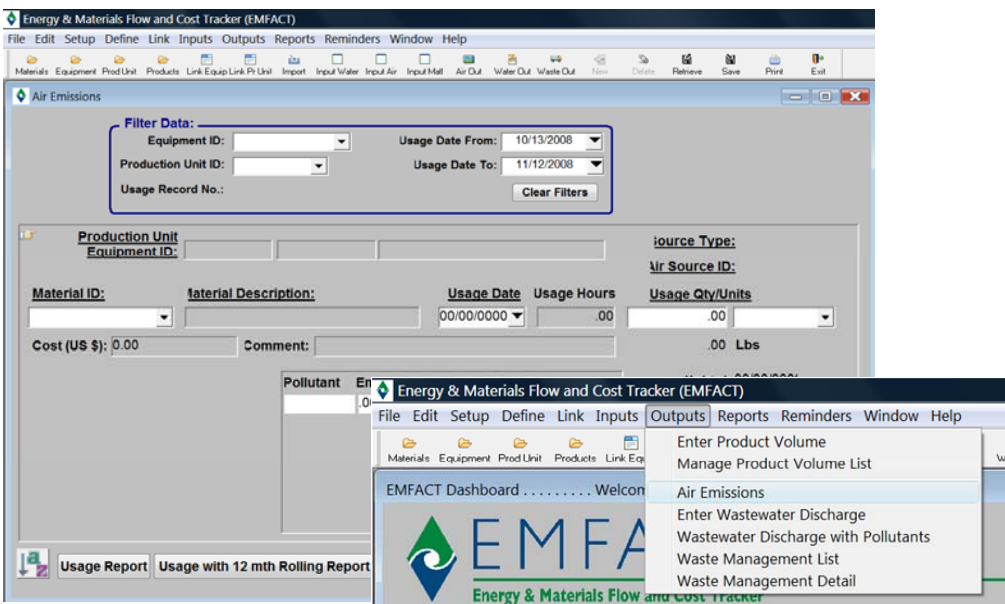


Click the **Air Out** button to directly open the **Air Emissions** window

5

Out Buttons

Clicking one of the **Out** buttons opens the window for viewing/maintaining **output** data for that item (air emissions, wastewater discharge, waste management activity)

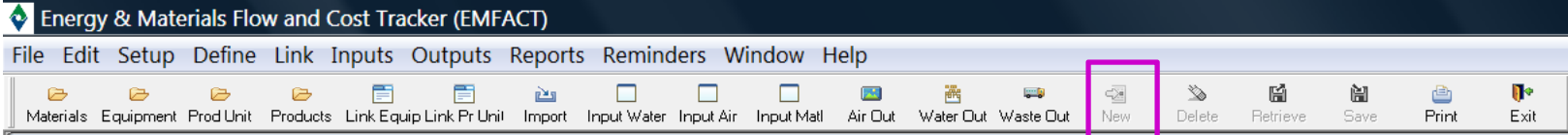


The alternative menu path is displayed above **Outputs → Air Emissions**

Clicking the **Air** button under the **Non-product** column on the **Home** page will open the **Air Emissions** window

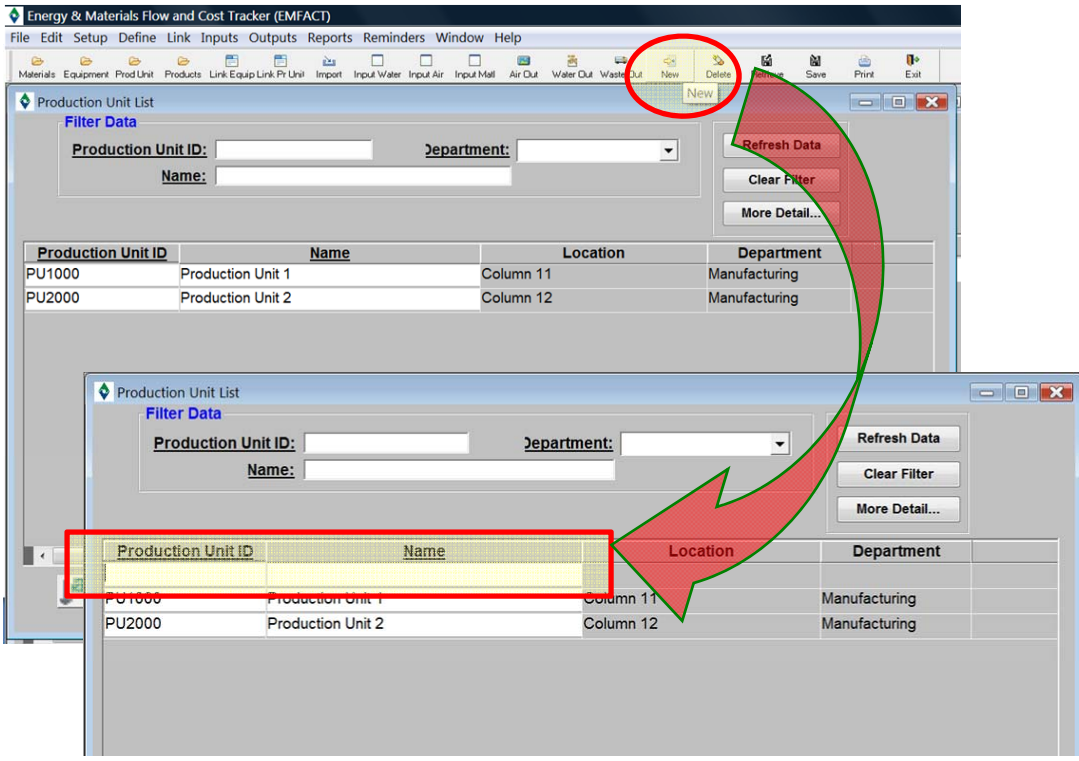
EMFACT Navigation





Click the **New** button when you are entering data to add a new row

6

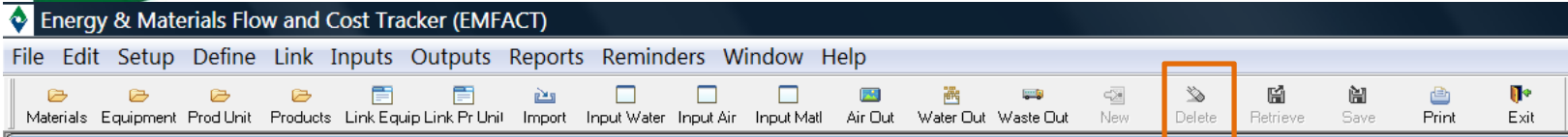


New Button

Clicking the **New** button allows you to make a **new row** when entering lists of data

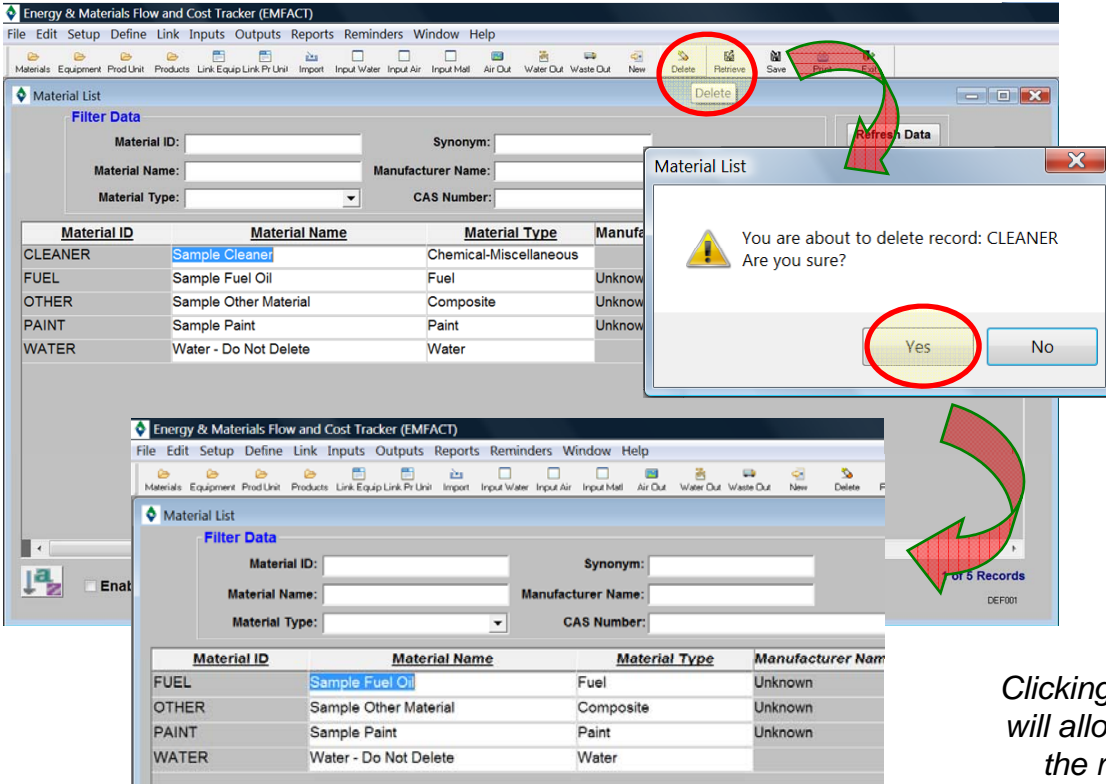
The **New** button is not active unless you are in a data entry window

Note: Remember to click **SAVE** when you are entering data!



Place the cursor in the row to be deleted and click the **Delete** button when you are in a data window

7

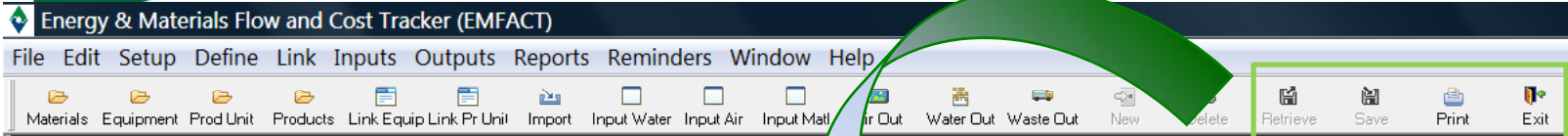


Delete Button

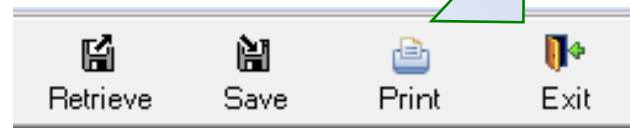
Clicking the **Delete** button allows you to **delete a row** when entering lists of data

The **Delete** button is not active unless you are in a data entry window

Clicking the **Yes** button will allow you to delete the row indicated



8



Common Function Buttons

There are standard buttons on the **Toolbar**, which are used for the following:

Retrieve is used to access data or records from the database

Save is used to commit your changes to the database

Print is a shortcut used for printing data a report or window in EMFACT

The **Exit** button closes all open windows within the module; if you have made any changes, you will be prompted to save your data



Enter **Search Criteria** and click **Search for Materials**.

Records with matching criteria will be displayed.

Select the desired **Material ID** and click **Select This Material**.

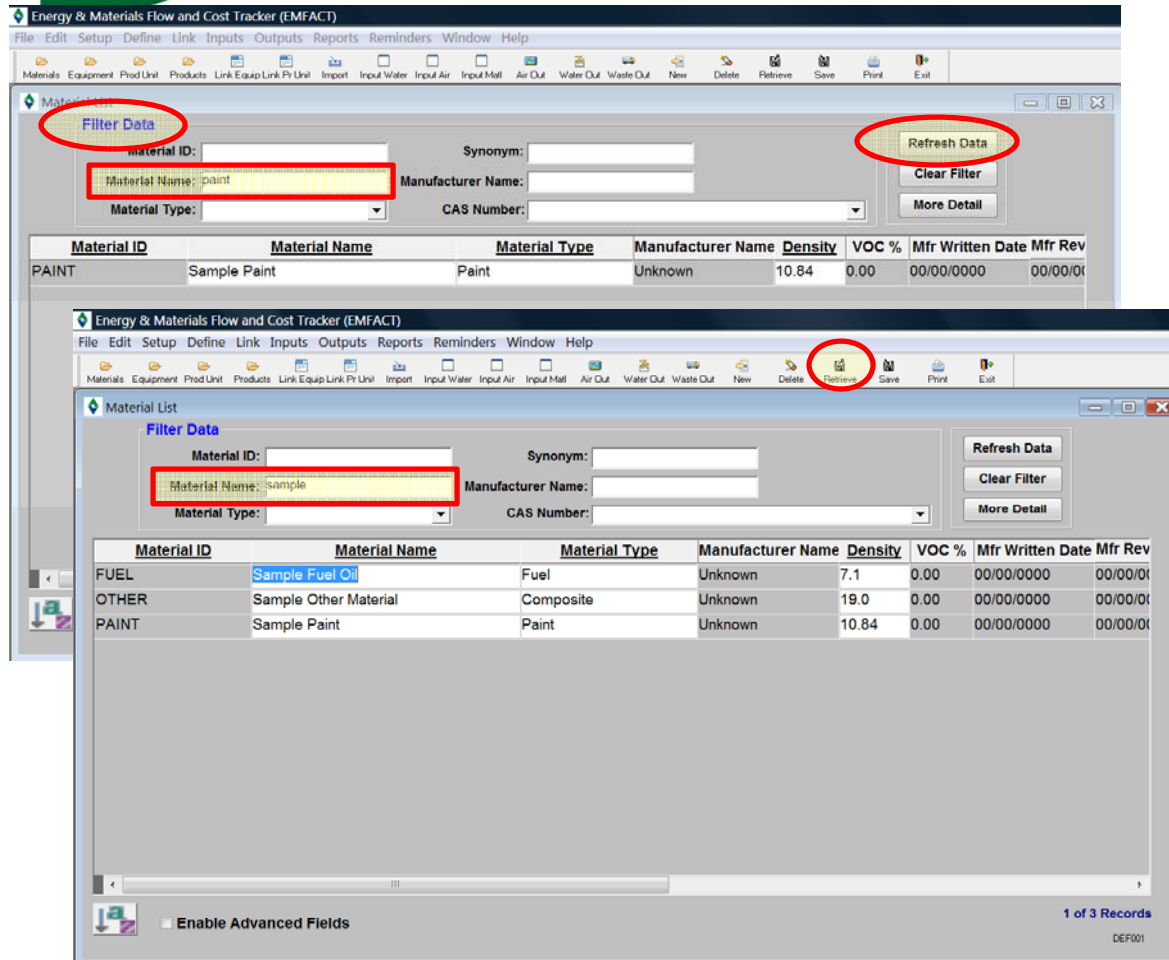
Yellow Binoculars Button

Fields that are “searchable” will have the **Yellow Binoculars** icon next to them



Click the **Yellow Binoculars** icon. The appropriate Search window will open

*In this example, the **Search For Materials** window is launched*



The screenshot shows the EMFACT software interface. The top window is titled "Material List" and has a "Filter Data" section at the top. The "Material Name" field is highlighted with a red box and contains the text "sample". The "Refresh Data" button is also highlighted with a red box. Below the filter section is a table with the following data:

Material ID	Material Name	Material Type	Manufacturer Name	Density	VOC %	Mfr Written Date	Mfr Rev
FUEL	Sample Fuel Oil	Fuel	Unknown	7.1	0.00	00/00/0000	00/00/00
OTHER	Sample Other Material	Composite	Unknown	19.0	0.00	00/00/0000	00/00/00
PAINT	Sample Paint	Paint	Unknown	10.84	0.00	00/00/0000	00/00/00

The bottom window is titled "Material List" and has a "Filter Data" section at the top. The "Material Name" field is highlighted with a red box and contains the text "sample". The "Refresh Data" button is also highlighted with a red box. Below the filter section is a table with the following data:

Material ID	Material Name	Material Type	Manufacturer Name	Density	VOC %	Mfr Written Date	Mfr Rev
PAINT	Sample Paint	Paint	Unknown	10.84	0.00	00/00/0000	00/00/00

Searching

Windows that have a **Filter Data** section at the top indicate that you can perform a search for records

Complete **at least one field** in the **Filter Data** section. More fields will narrow your search, while fewer fields will broaden it

Click **Refresh Data** or **Retrieve** and records that match the search criteria will display

To perform another search, click **Clear Filters**

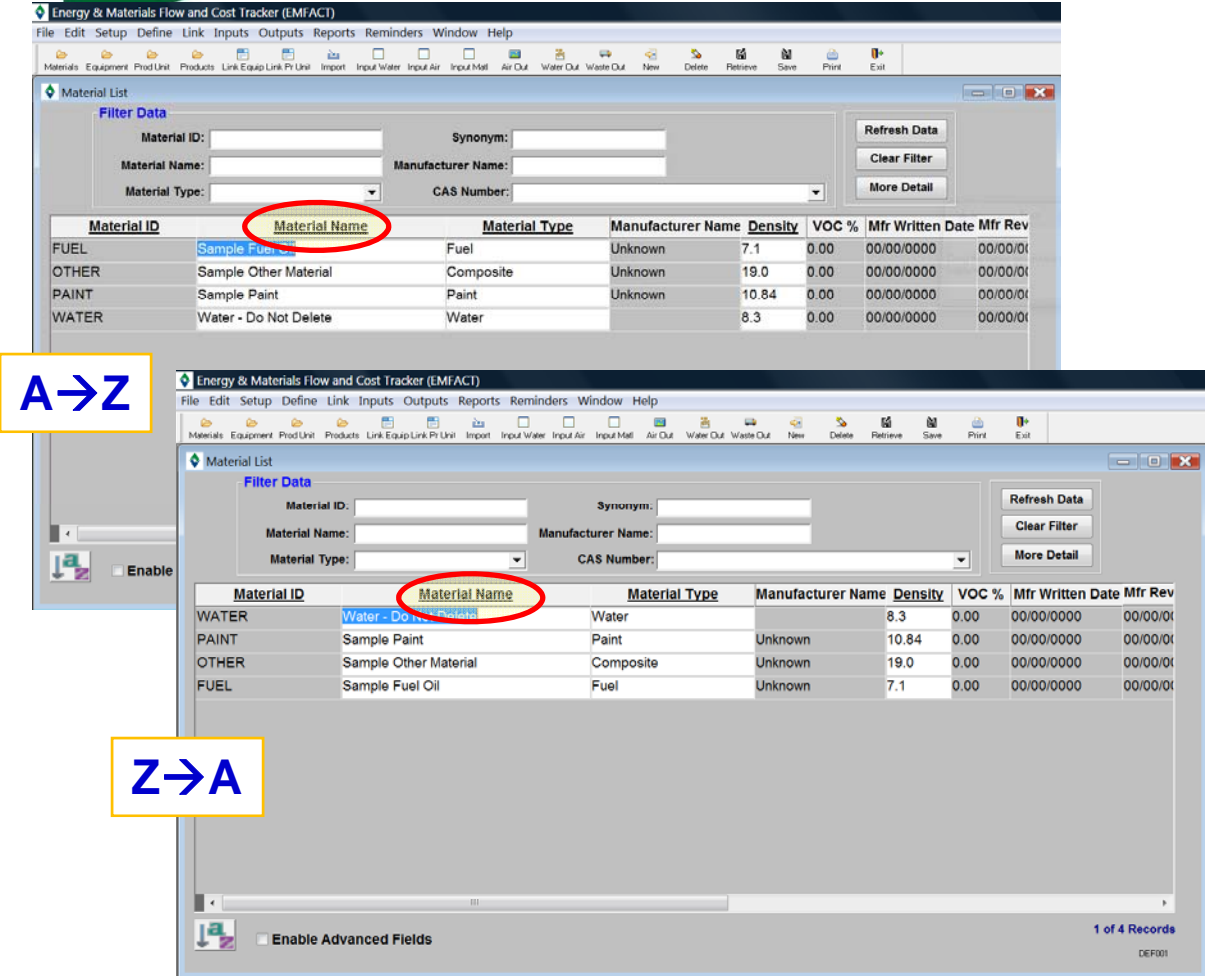
In this example, the **Material List** window has been accessed (**Define** → **Materials** → **Materials List**)

Sorting

To use this feature, you must have already performed a search and **there must be search results** in the bottom half of the window

Click the **heading of the column** you wish to sort by

Search results will change in ascending (A→Z) order; click column heading again to sort descending (Z→A)



A→Z

Material ID	Material Name	Material Type	Manufacturer Name	Density	VOC %	Mfr Written Date	Mfr Rev
FUEL	Sample Fuel Oil	Fuel	Unknown	7.1	0.00	00/00/0000	00/00/00
OTHER	Sample Other Material	Composite	Unknown	19.0	0.00	00/00/0000	00/00/00
PAINT	Sample Paint	Paint	Unknown	10.84	0.00	00/00/0000	00/00/00
WATER	Water - Do Not Delete	Water		8.3	0.00	00/00/0000	00/00/00

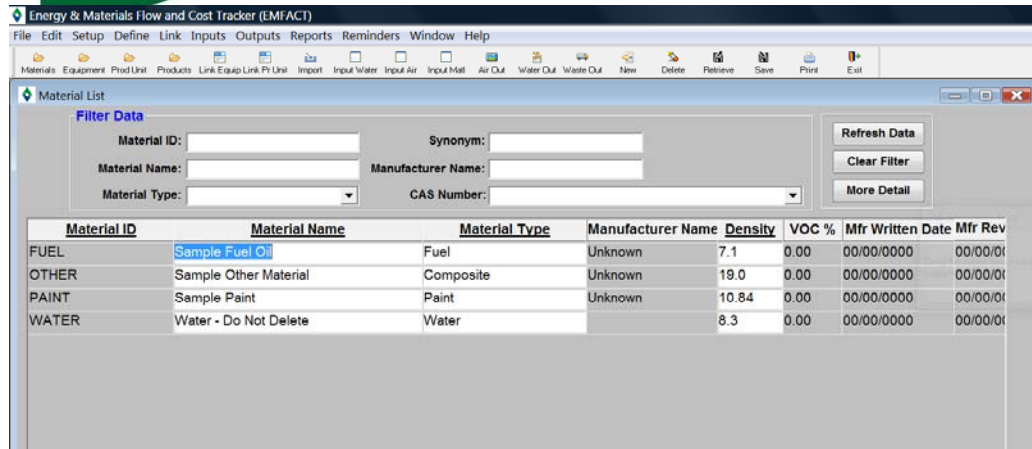
Z→A

Material ID	Material Name	Material Type	Manufacturer Name	Density	VOC %	Mfr Written Date	Mfr Rev
WATER	Water - Do Not Delete	Water		8.3	0.00	00/00/0000	00/00/00
PAINT	Sample Paint	Paint	Unknown	10.84	0.00	00/00/0000	00/00/00
OTHER	Sample Other Material	Composite	Unknown	19.0	0.00	00/00/0000	00/00/00
FUEL	Sample Fuel Oil	Fuel	Unknown	7.1	0.00	00/00/0000	00/00/00

1 of 4 Records
DEF001

In this example, the **Material List** window has been accessed (**Define → Materials → Materials List**)

EMFACT Navigation



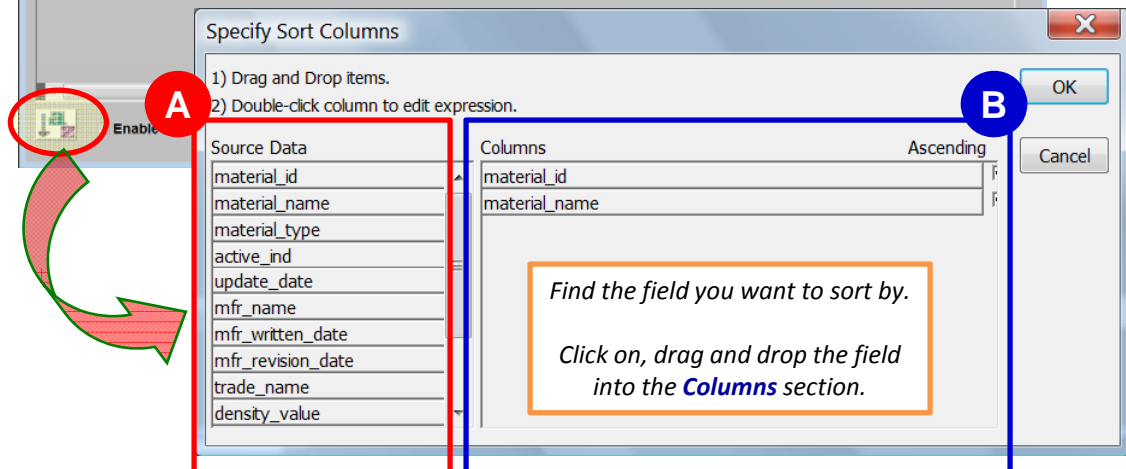
Sorting on Multiple Fields

This method is used when needing to sort first on one field then on another, and so on

Click the **Sort** button



The **Specify Sort Columns** window will display



A The **Source Data** section displays every field on which the data can be sorted

B The **Columns** section displays the field(s) on which the data is currently sorted and defaults to ascending order

Click **OK**

In this example, the **Material List** window has been accessed (**Define** → **Materials** → **Materials List**)



Energy & Materials Flow and Cost Tracker (EMFACT)

File Edit Setup Define Link Inputs Outputs Reports Reminders Window Help

Materials Equipment Prod Unit Products Link Equip Link Pr Unit Import Input Water Input Air Input Mail Air Out Water Out Waste Out New Delete Retrieve Save Print Ex

Equipment Detail EQ1000

Equipment ID: EQ1000 AKA No: Status: Active

Name: Equipment 1000 Category: Boring Machine

Building: 1A Manufacturing Building Production Unit ID: PU1000

Location:

Department: K1000 Manufacturing Update Date: 11/12/2008

Manufacturer: Installation Date: 03/25/2002

Model: Permit/Reg. No:

Annual Operation Hours: 0

File Name: GO

Enable Advanced Fields

Comments Costs

Adding Comments

The **Comments button** is generally located at the bottom of the window

Click the **Comments** button. The **Enter Comments** popup will display

Enter freeform text into the window

Click **OK** or the **X**. The popup will close

Click **Save** (Toolbar)

Enter Comments

The equipment is leased and will be returned on 12/12/08.

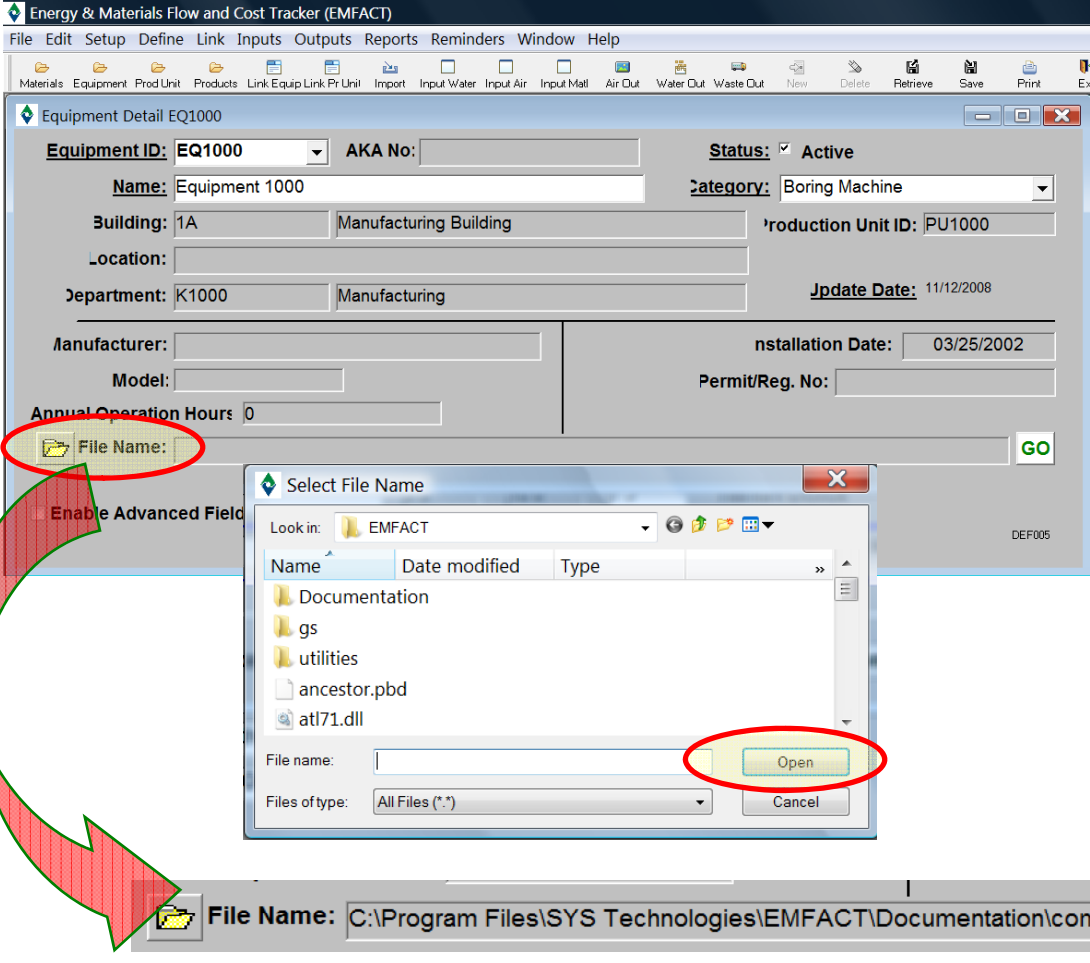
OK

EMF001

Comments

The **Comments** button will display a "✓" to indicate a comment has been entered

*In this example, the **Equipment Detail List** window has been accessed (**Define** → **Equipment** → **Equipment Detail**)*



Attaching Files

Some windows offer the option of identifying and linking electronic files (e.g., documents or pictures) to the record

Click the **yellow folder icon** next to the **File Name** field. The **Select File Name** popup will open



Navigate to and select the desired file and click **Open**. The **File Name** field will fill with the file path

Click the **GO** button to view the file

*In this example, the **Equipment Detail List** window has been accessed (**Define** → **Equipment** → **Equipment Detail**)*

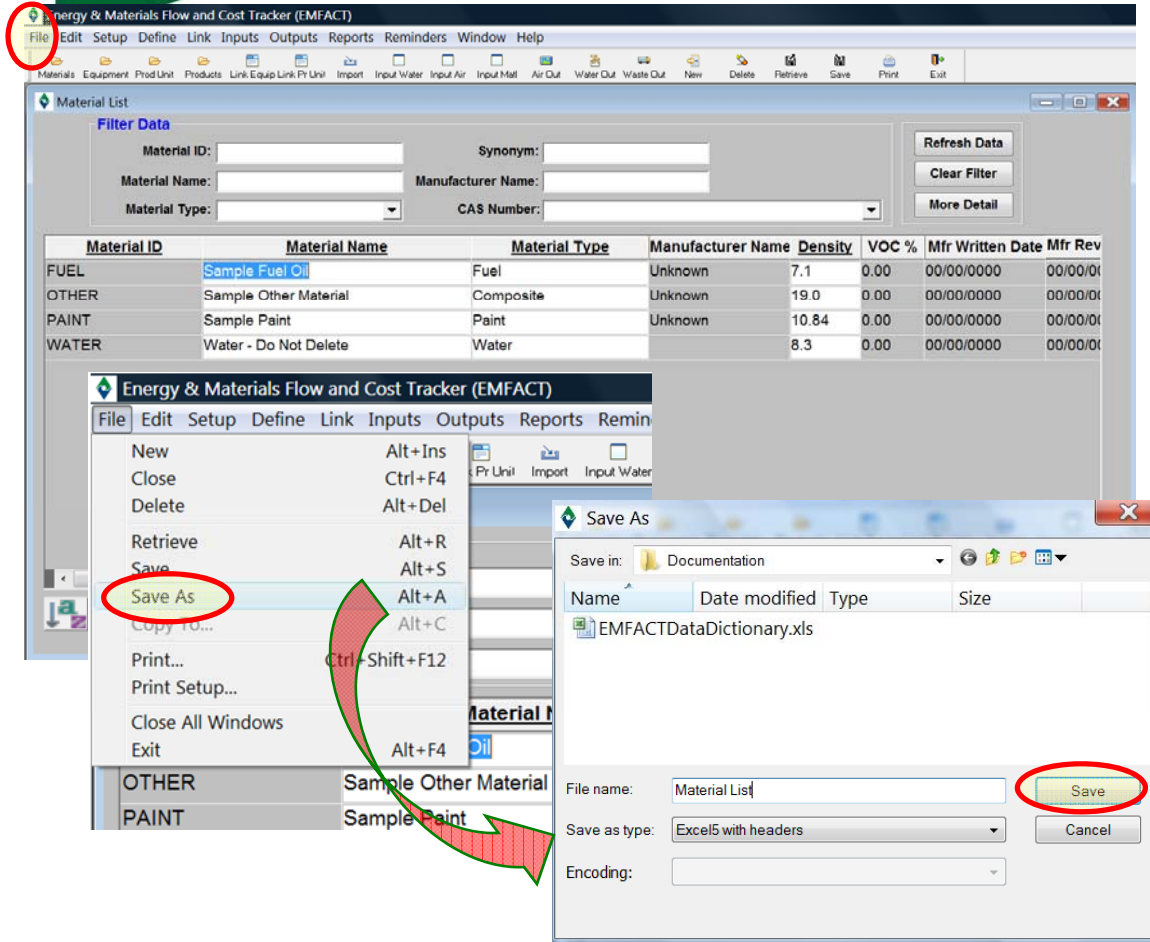
Saving Data Output

Most **List** windows allow you **save** your data to another format such as Excel™ or a Text file

Select **File** → **Save As** from the **Toolbar**. The **Save As** popup will open

Complete the **Filename** field and make a selection from the **Save As** type dropdown. The most common choices are CSV (comma separated values), Excel with headers, and Text with headers

Click **Save**



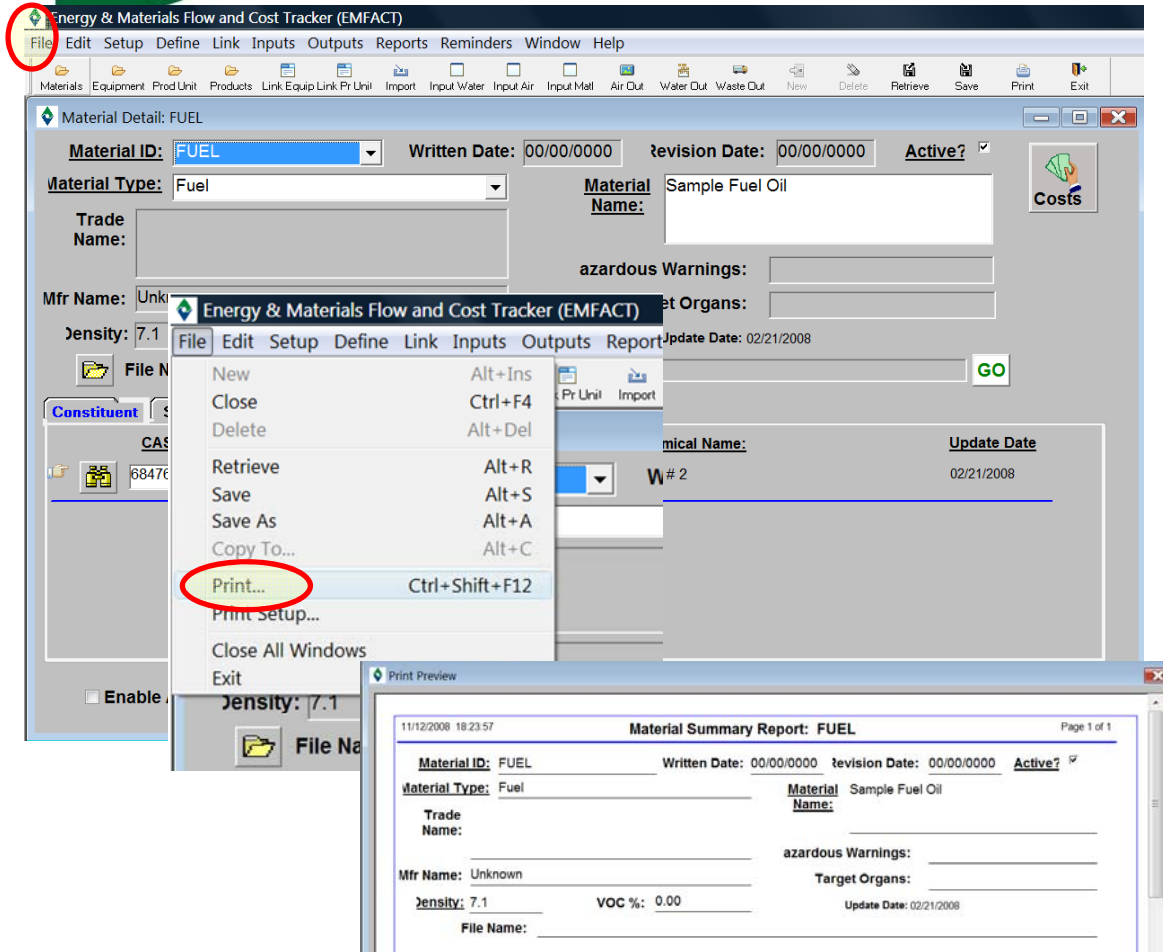
The screenshot shows the EMFACT software interface. The **Material List** window is open, displaying a table of materials. The **File** menu is open, and the **Save As** option is highlighted. The **Save As** dialog box is also open, showing the file name **Material List** and the **Save** button highlighted.

Material ID	Material Name	Material Type	Manufacturer Name	Density	VOC %	Mfr Written Date	Mfr Rev
FUEL	Sample Fuel Oil	Fuel	Unknown	7.1	0.00	00/00/0000	00/00/00
OTHER	Sample Other Material	Composite	Unknown	19.0	0.00	00/00/0000	00/00/00
PAINT	Sample Paint	Paint	Unknown	10.84	0.00	00/00/0000	00/00/00
WATER	Water - Do Not Delete	Water		8.3	0.00	00/00/0000	00/00/00

In this example, the **Material List** window has been accessed (**Define** → **Material** → **Material List**)

EMFACT Navigation





Printing

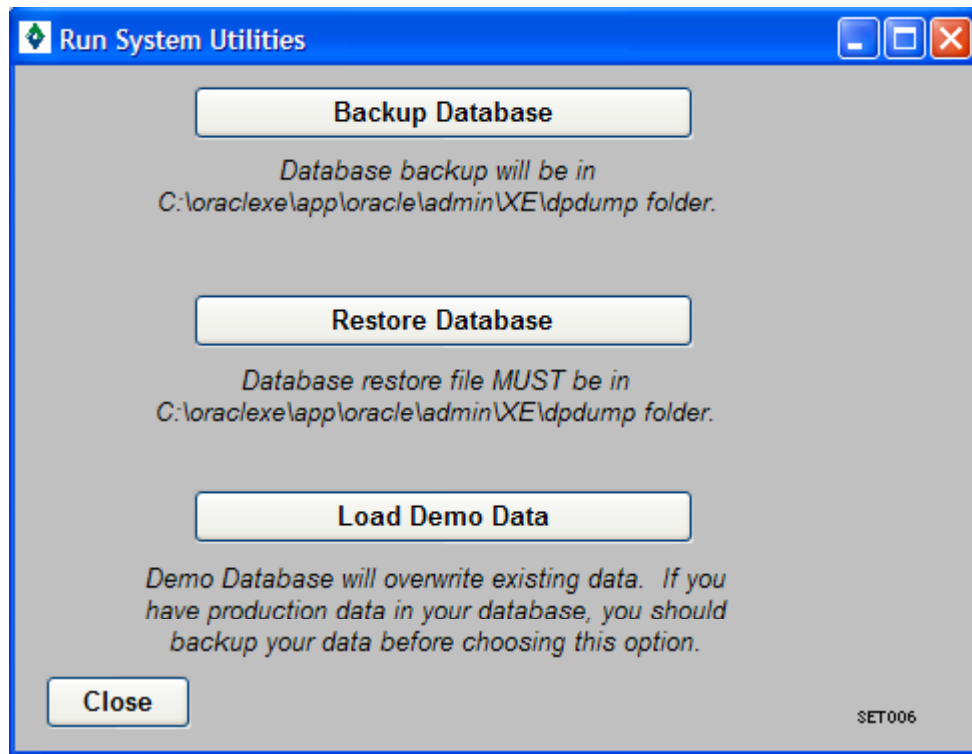
Some windows have summary reports that you can **print**:

- Material Detail
- Equipment Links
- Production Unit Links

Select **File → Print** from the main menu. A **Print Preview** window will display. Click the **Print** button at the bottom of the **Print Preview** window

The report will print to your **default printer**

*In this example, the **Material Detail List** window has been accessed (**Define → Material → Material Detail List**)*



In this example, the **System Utilities** window has been accessed (**Setup → System Utilities**)

Backup and Restore

EMFACT runs on your local C drive. It is **VERY IMPORTANT** to remember to backup your data.

You can always get a new version of EMFACT installed, but you cannot recover your data unless it has been backed up.

There is no automatic backup feature in EMFACT.

Select **Setup → System Utilities** from the main menu.

Backup saves the data from EMFACT to a file on your c drive with the data in the name.

Restore prompts the user to select a previously backed up file and will reset the EMFACT database to the data from the file. 44



Let's try EMFACT now....

- Advanced vs. Basic use
- Toolbar for commonly used windows
- New – Delete – Retrieve – Save
- Searching – Sorting – Save As – Printing – Material List
- Binoculars – Comments – File Attach - Material Detail window