



Facility and Location is the grouping that refers to where items/assets/tools may be stored or used. Again, everyone has their own thought process for structuring these groups:

A **Facility** can be an actual facility, or a pseudo-facility (I.E., a holding term that represents some particular group of Locations).

A **Location** is a subset of Facility indicating where, within that 'Facility', an item is to be located or found. A location has a further designation as a:

Storage Location: Where an item is located when it is "Home" or where it's supposed to be when it's not being used. Items are "checked out" FROM a Storage location, TO a Usage/Checkout location; but, ARE EXPECTED to be returned to that Storage location at some point.

Usage/Checkout Location: Where an item is located when it is being used

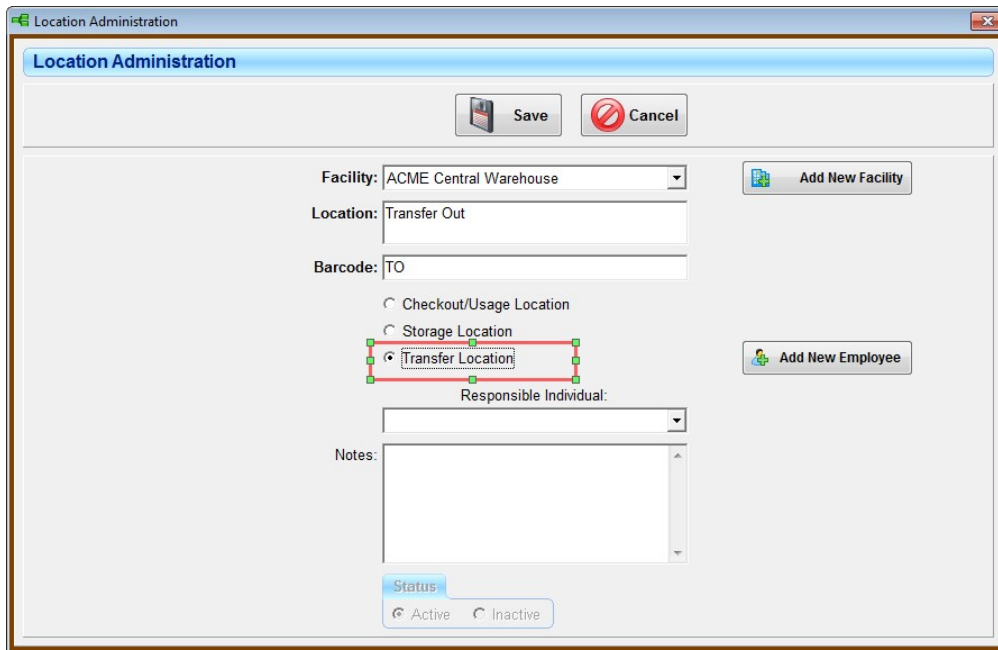
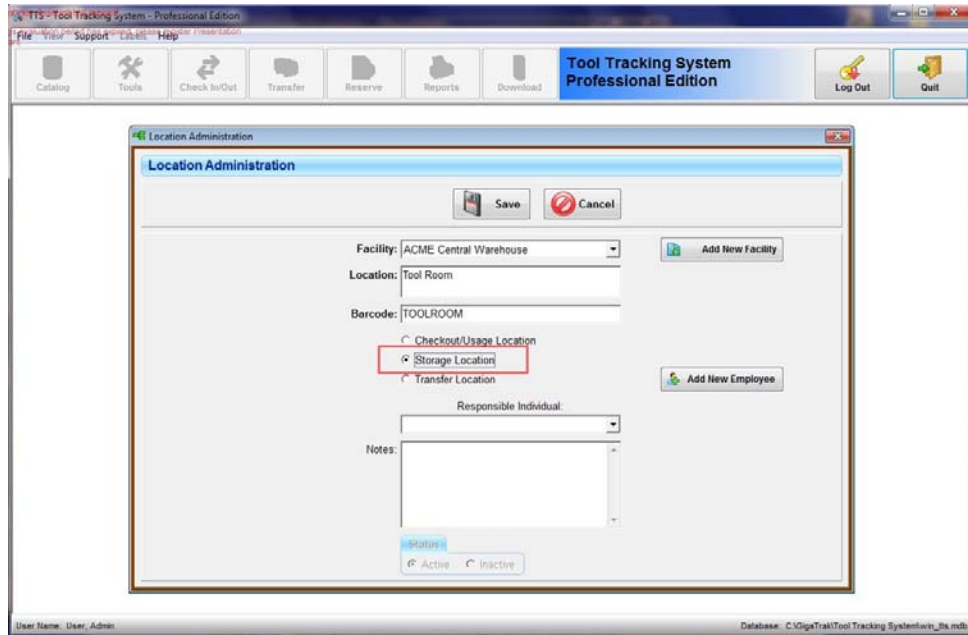
Transfer Location: When an item is given a "new" home, it is "transferred". This term is used particularly by companies that may have multiple "facilities", or "locations" and move equipment from one facility or location, to another. Either "transferring" responsibility for that equipment from one physical facility or location, to another; or "relocating" materials/equipment from one "storage" location to another.

Each facility that will be Transferring materials to another location will need to have at least one 'Transfer' location designated. In the "TRANSFER" Function, this will be used under the Transfer "Out" Tab. The location that receives the transfer then becomes the new "Storage" location or "Home", responsible for checking in/out that item to its own users.

There are a couple of ways transfers can take place. Which way serves the purpose best depends upon how the terms "Facility" and "Location" are defined by each user.

If **Facility** is a broad, single, overall umbrella for the main company (*Company XYZ*), AND physical "**Locations**" are places/buildings, etc., for that company, then the **TRANSFER Function** is a simple way to re-locate or "transfer" equipment/items (See *Option 1* later in this document for example).

If there are **multiple Facilities**, and within each Facility there are **multiple Locations**, then the "CheckOUT/CheckIN" Function is a simple way to conduct the Transfer (See *Option 2* later in this document for example).





TRANSFER OPTION 1 (Single Facility with Multiple Locations): (All 'Storage' Locations fall under and can be selected as "Transfer IN" locations under the same, Single Facility)

Facility : Storage Location : Transfer Location : Usage/Checkout Location

Facility- Acme Central Warehouse

Purchases equipment for overall company use; but, changes storage locations depending upon responsible business segment or need .

Location (Storage) = Toolroom

Location (Transfer OUT) = Transfer Out

Location (Storage) = Shelf 200

Location (Storage) = Aisle 1

Location (Storage) = Aisle 2

Location (Storage) = Seattle Facility

Location (Storage) = Shelf B

Location (Usage) = Boston Service Fleet-Van2

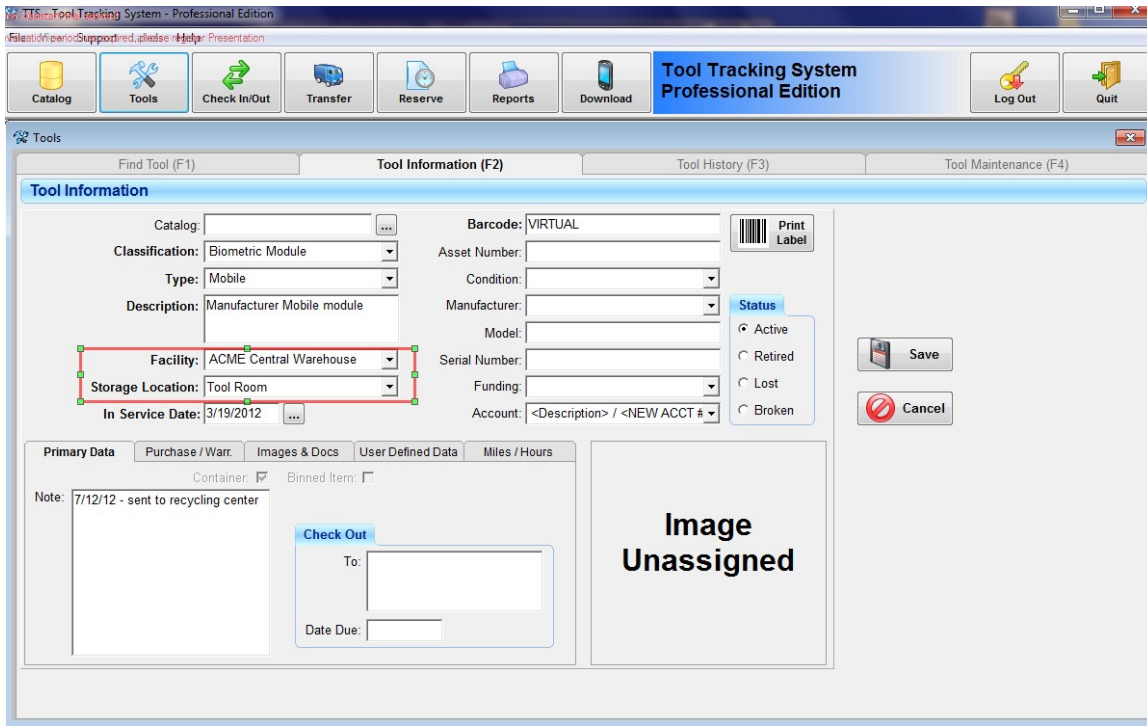
Location (Usage) = New York Customer Service

Location (Usage) = Seattle Returns Center

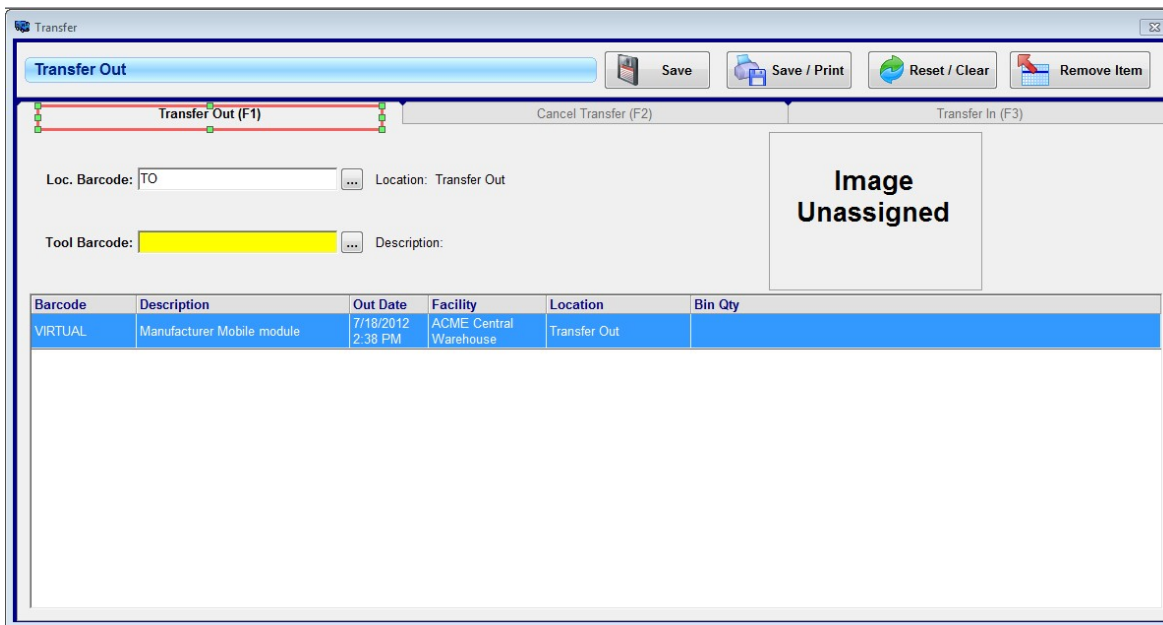
Location (Usage) = Main Branch-Repair Center



Original Storage Location:

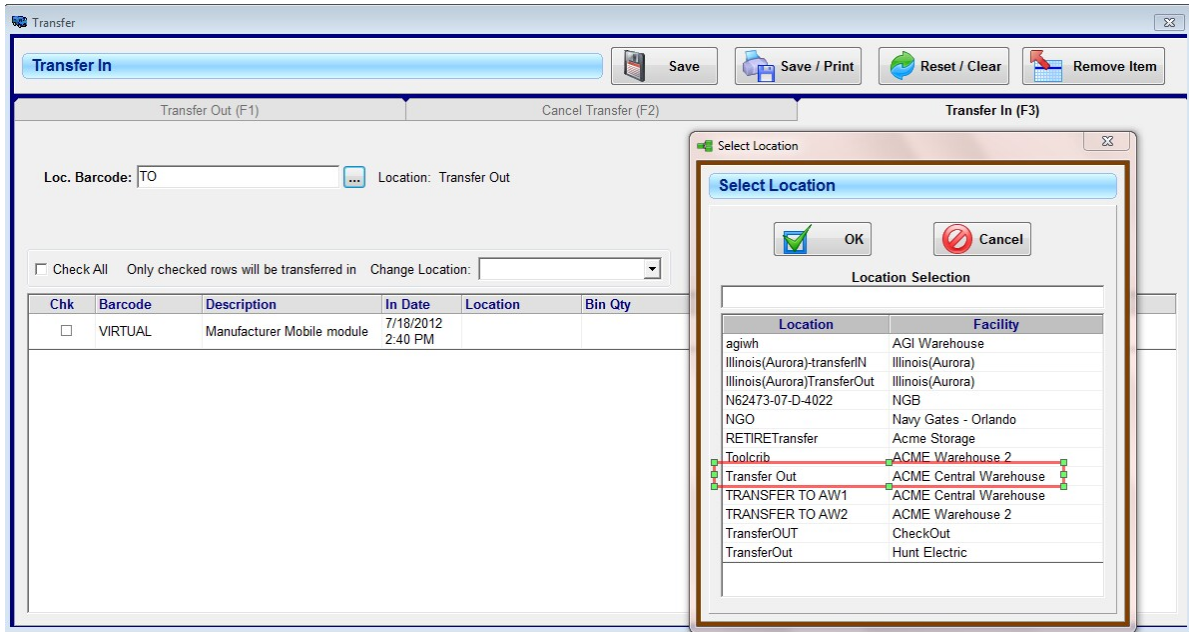


Transfer Out to new Storage Location:

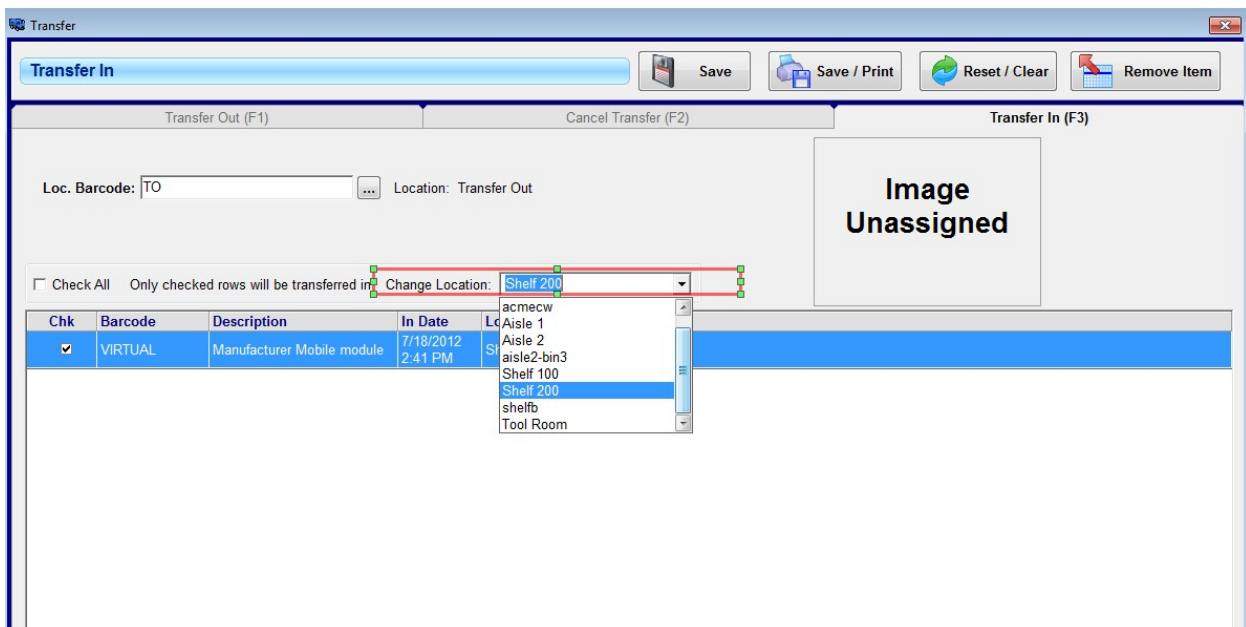




Pick Transfer Out location:



Complete Transfer via Transfer IN:





New Storage Location:

Tools

Find Tool (F1) Tool Information (F2) Tool History (F3) Tool Maintenance (F4)

Tool Information

Catalog:

Classification: Biometric Module

Type: Mobile

Description: Manufacturer Mobile module

Facility: ACME Central Warehouse

Storage Location: Shelf 200

In Service Date: 3/19/2012

Barcode: VIRTUAL

Asset Number:

Condition:

Manufacturer:

Model:

Serial Number:

Funding:

Account: <Description> / <NEW ACCT #>

Print Label

Previous Next

Status

- Active
- Retired
- Lost
- Broken

Add

Edit

Delete

Copy

Print Info

Primary Data Purchase / Warr. Images & Docs User Defined Data Miles / Hours

Container: Binned Item:

Note: 7/12/12 - sent to recycling center

Check Out

To: Illinois(Aurora)-Transfer (Illinois(Aurora))

Date Due:

Image Unassigned



TRANSFER OPTION 2 (Multiple Facilities, Multiple Locations under each Facility):

Using the TRANSFER Function, all 'Storage' Locations fall under, *and* can be selected as "Transfer IN" locations under the *same*, Single Facility.

If inventory is to be "Transferred", I.E., have its "storage location" changed to *another* facility, then this transaction is completed NOT in the TRANSFER Function, but rather from the Check IN Function.

Simply select the item to be "transferred", select the new "Facility" from the drop down line item listing, then select the new "Location" within that new facility to complete the transfer.

Facility MAIN = Main Office
Purchases equipment for companywide facility use, then disperses .

Location (Storage) = Receiving (Receive)

Location (Storage) = Warehouse, Aisle2, Bin3 (Putaway)

Location (Check Out to) = Facility C

Location (Check Out to) = Facility B

Location (Check Out to) = Facility K

Transfer **FROM** MAIN Branch Facility **TO** New York Branch:

FacilityC = New York Branch

Location (CheckIn/Change Facility/Change StorageLoc) = Facility

Transfer FROM New York Branch Facility TO Illinois Plant:

FacilityB = Illinois Plant

Location (Checkin/Change Facility/Change Storage Loc) = Facility Illinois

Transfer FROM Illinois Plant to Georgetown:

FacilityK = Georgetown

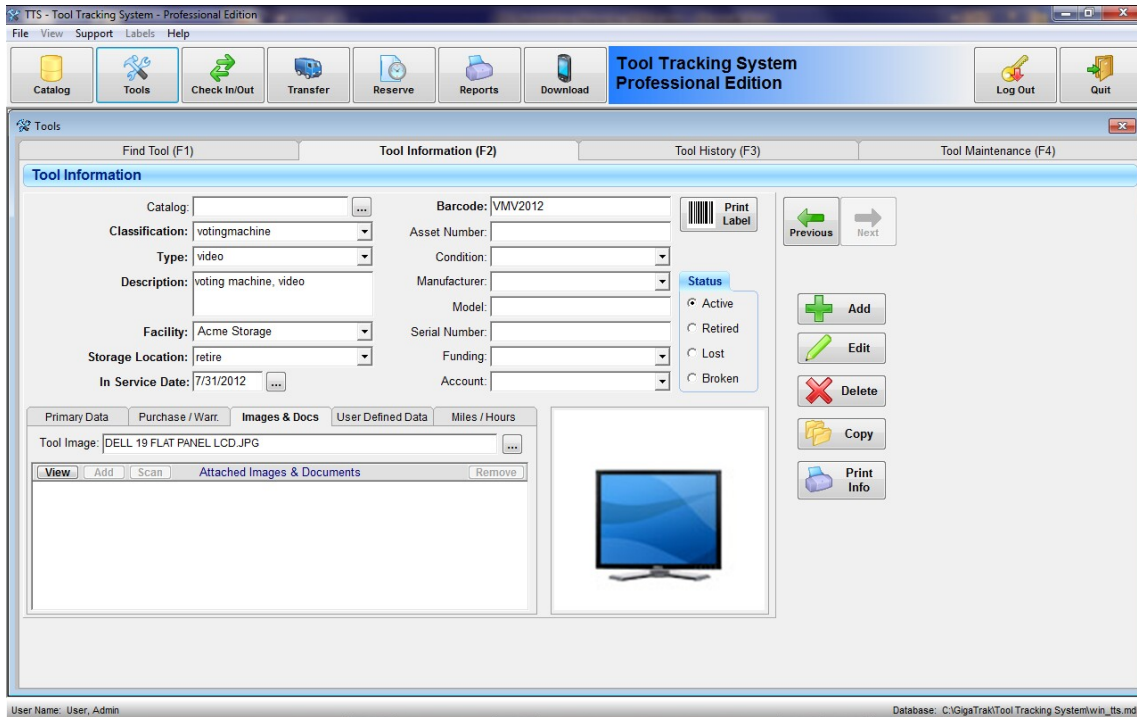
Location (CheckIn / Change Facility/Change Storage Loc) = Facility Georgetown/

Location (CheckIn / Change Facility/Change Storage Loc) = Facility Georgetown/

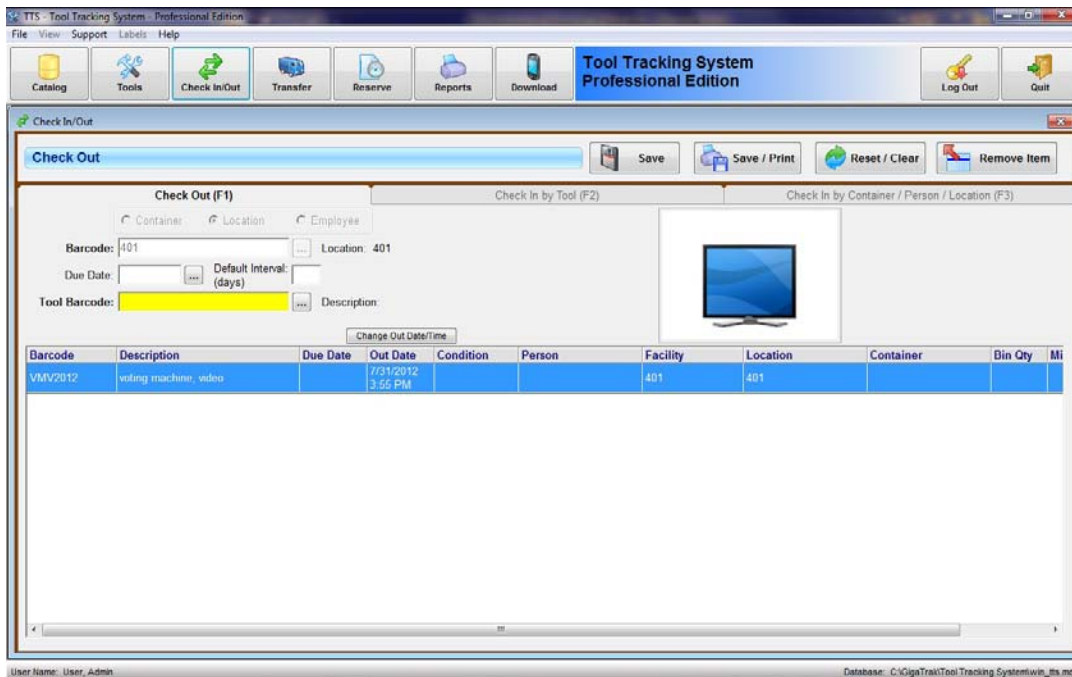
Location (CheckIn / Change Facility/Change Storage Loc) = Facility Georgetown/



Original Item/Facility/Storage Location:

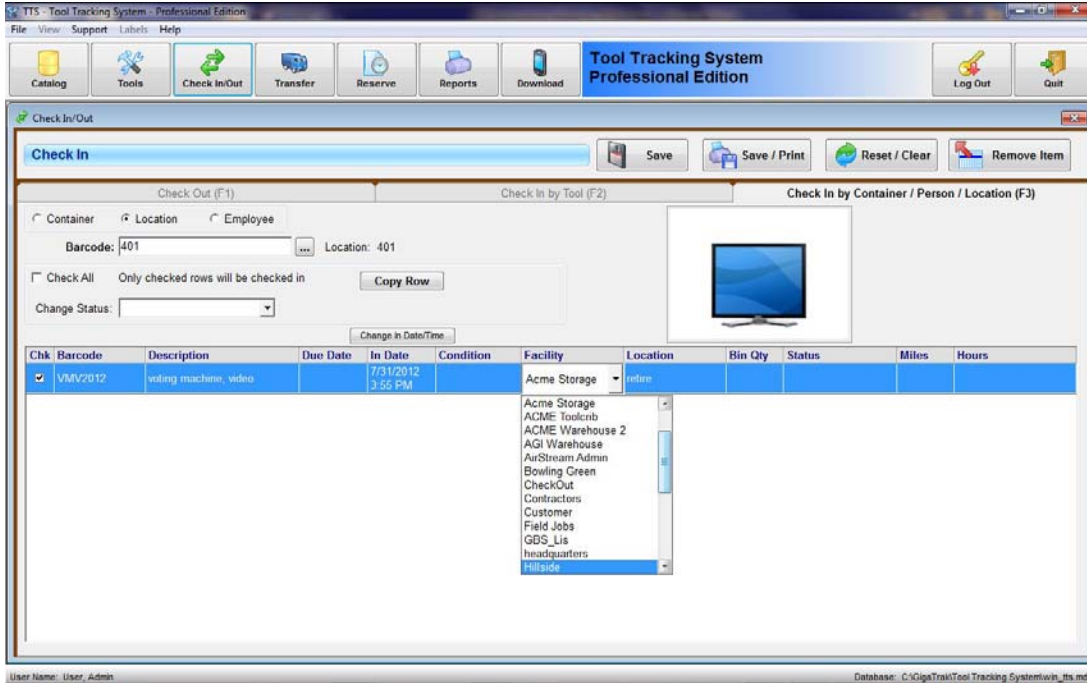


Check OUT item to New Facility/Storage location:

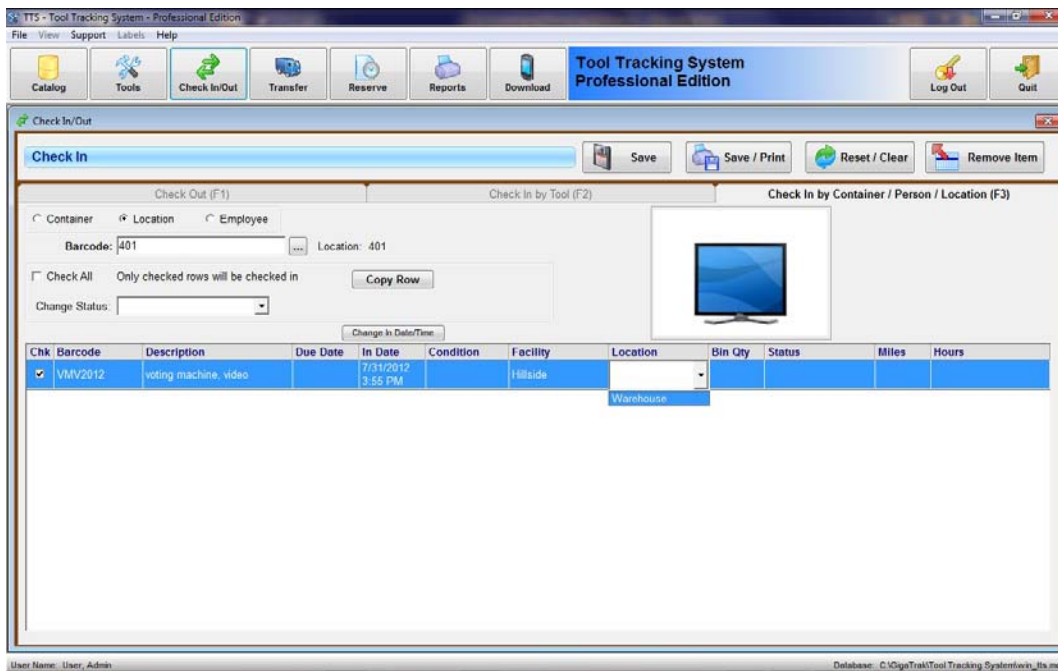




Check IN item, but change to New Facility:



Check IN item, but change to New Location, then SAVE:





New Facility and Location are reflected on Tool Screen:

Tools

Find Tool (F1) Tool Information (F2) Tool History (F3) Tool Maintenance (F4)

Tool Information

Catalog: Barcode: VMV2012 Print Label

Classification: votingmachine Asset Number:

Type: video Condition:

Description: voting machine, video Manufacturer:

Facility: Hillside Model:

Storage Location: Warehouse Serial Number:

In Service Date: 7/31/2012 Funding:

Account:

Status

Active Retired

Lost Broken

← Previous Next →

Add

Edit

Delete

Copy

Print Info

Primary Data Purchase / Warr. Images & Docs User Defined Data Miles / Hours

Container: Binned Item:

Note:

Check Out

To:

Date Due: