



## Facilities/Locations

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**Thank you for using GigaTrak Software! This document explains the use of Facilities and Locations of the Tool Tracking System.**

A *Facility* and *Location* is the grouping that refers to where tools may be stored or used. Every organization has their own thought process for structuring this hierarchy. Facilities and Locations have a Parent/Child relationship.

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

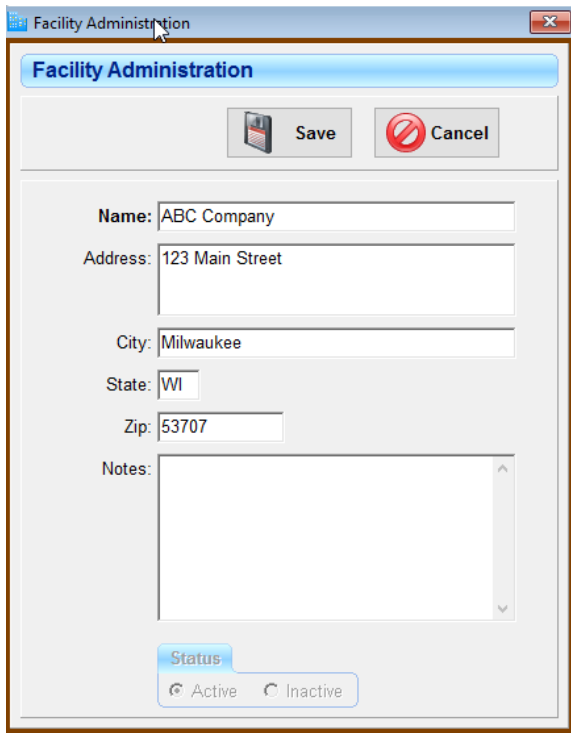
A *Location* is a subset of a Facility indicating where, within that Facility, an item is to be located or found. A location has a further designation and can be classified as either a

- **Storage Location** - Where an item is located when it is "Home" or where it's supposed to be when it's not being used
- **Checkout Location** – Where an item gets Checked out to or Used
- **Transfer Location (Rarely Used)** – Where an item gets transferred to in order to give it a new Storage Location (This document does NOT cover the Transfer process. Please see the Transfer Function document for more information)

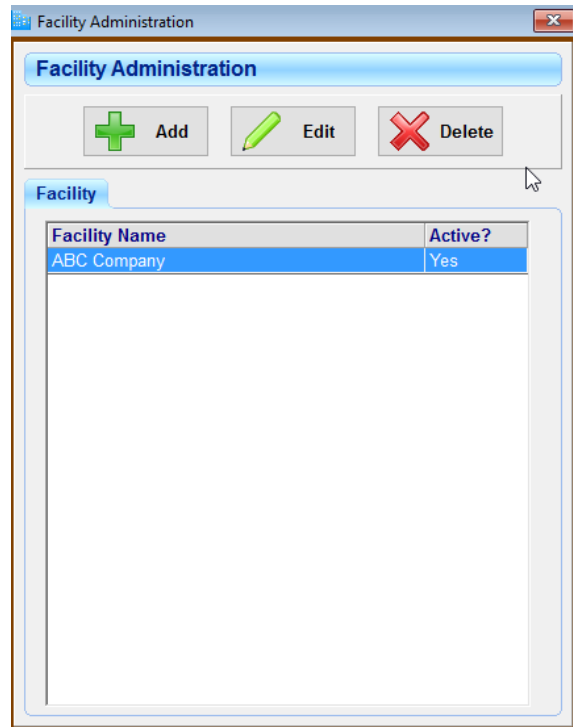
All Tools MUST have a Storage Location when first setup in the system. Tools are then Checked out FROM a Storage Location TO an Employee or Checkout/Usage Location. If you are only planning on checking out tools to employees, then you do not need to have any 'Checkout/Usage' Locations.

Example of a very simple Facility/Location setup for ABC Company with one Facility and one Storage Location. Many companies will only have one storage location.

Facility: ABC Company



The screenshot shows a 'Facility Administration' window with a form for entering facility details. The form includes fields for Name, Address, City, State, Zip, and Notes. The 'Name' field contains 'ABC Company', 'Address' contains '123 Main Street', 'City' contains 'Milwaukee', 'State' contains 'WI', and 'Zip' contains '53707'. There are 'Save' and 'Cancel' buttons at the top right. At the bottom, there is a 'Status' section with radio buttons for 'Active' and 'Inactive'.



The screenshot shows a 'Facility Administration' window with a table view. The table has two columns: 'Facility Name' and 'Active?'. The table contains one row with 'ABC Company' in the 'Facility Name' column and 'Yes' in the 'Active?' column. There are 'Add', 'Edit', and 'Delete' buttons at the top.

| Facility Name | Active? |
|---------------|---------|
| ABC Company   | Yes     |

Location under the ABC Facility: Warehouse

The screenshot shows the 'Location Administration' window. At the top, there are 'Save' and 'Cancel' buttons. Below that, there are two main sections: 'Add New Facility' and 'Add New Employee'. In the 'Add New Facility' section, the 'Facility' dropdown is set to 'ABC Company', the 'Location' text box contains 'Warehouse', and the 'Barcode' text box contains 'L001'. There are two radio buttons: 'Checkout/Usage Location' (unselected) and 'Storage Location' (selected). Below these is an empty 'Address' text box. In the 'Add New Employee' section, the 'Responsible Individual' dropdown is empty, and there is a 'Notes' text area. At the bottom right, there is a 'Status' section with 'Active' (selected) and 'Inactive' radio buttons.

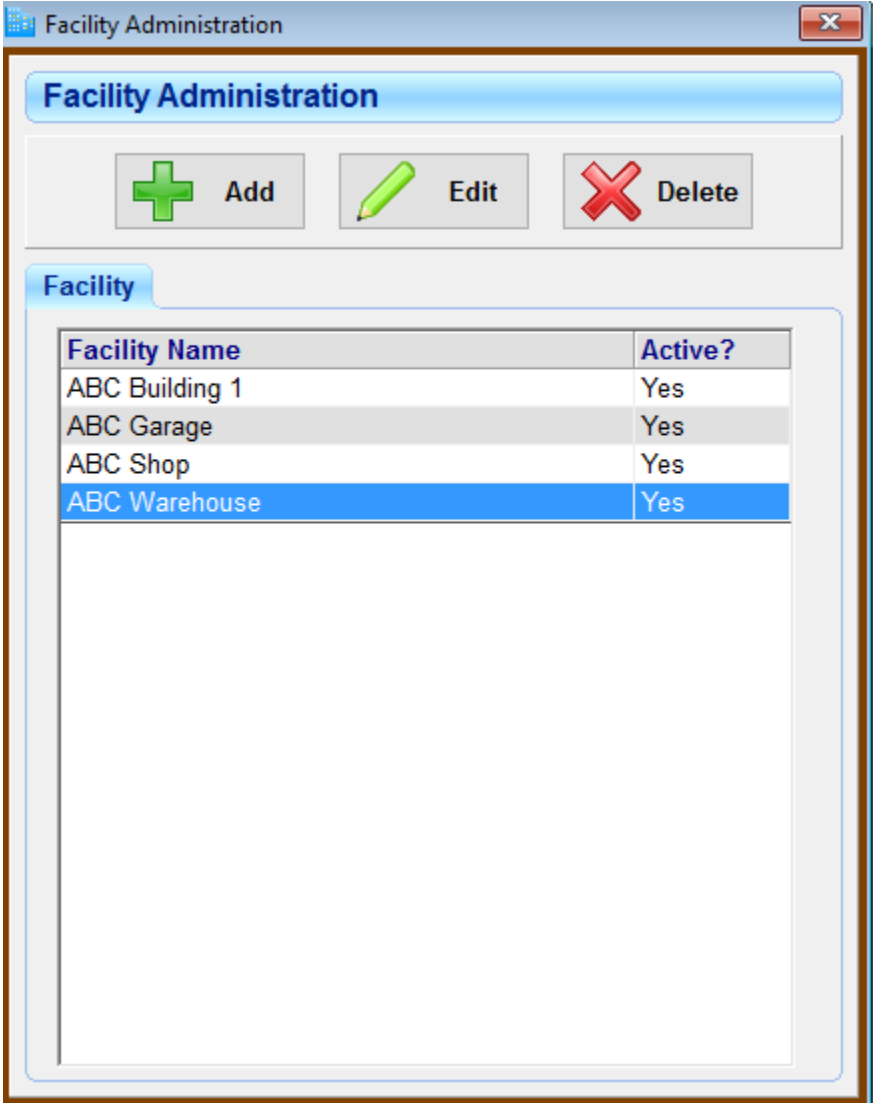
^This is a Storage Location where I will keep my tools when they are NOT being used.

I now have one Storage Location under the ABC Company Facility. Many companies will only have one storage location for their tools.

The screenshot shows the 'Location Administration' window with a list of locations. The 'Facility' dropdown is set to 'ABC Company'. Above the table are buttons for 'Add', 'Edit', and 'Delete'. Below the table are buttons for 'Export To File', 'Change Responsible Individual', 'Print Barcode List', and 'Print Label'. The table has the following data:

| Location  | Barcode | Responsible Individual | Storage? | Active? |
|-----------|---------|------------------------|----------|---------|
| Warehouse | L001    |                        | Yes      | Yes     |

However, you can choose to get very specific with your Facilities and Locations and have many. In the example below, I now have multiple facilities, each with multiple locations under them.



The screenshot shows a software window titled "Facility Administration" with a close button in the top right corner. Below the title bar is a blue header with the text "Facility Administration". Underneath the header is a toolbar with three buttons: "Add" (with a green plus icon), "Edit" (with a green pencil icon), and "Delete" (with a red X icon). Below the toolbar is a tab labeled "Facility". Under the "Facility" tab is a table with two columns: "Facility Name" and "Active?". The table contains four rows of data, with the last row highlighted in blue.

| Facility Name  | Active? |
|----------------|---------|
| ABC Building 1 | Yes     |
| ABC Garage     | Yes     |
| ABC Shop       | Yes     |
| ABC Warehouse  | Yes     |

Now, under the 'ABC Warehouse Facility', I have 6 different Storage Locations listed. When setting up a tool, you will then have to choose one of these specific locations that tool is stored at.

The screenshot shows the 'Location Administration' window. At the top, there are three buttons: 'Add' (green plus), 'Edit' (pencil), and 'Delete' (red X). Below these are four buttons: 'Export To File' (folder icon), 'Change Responsible Individual' (two people icon), 'Print Barcode List' (barcode icon), and 'Print Label' (barcode icon). A 'Facility:' dropdown menu is set to 'ABC Warehouse'. Below the menu is a table with the following data:

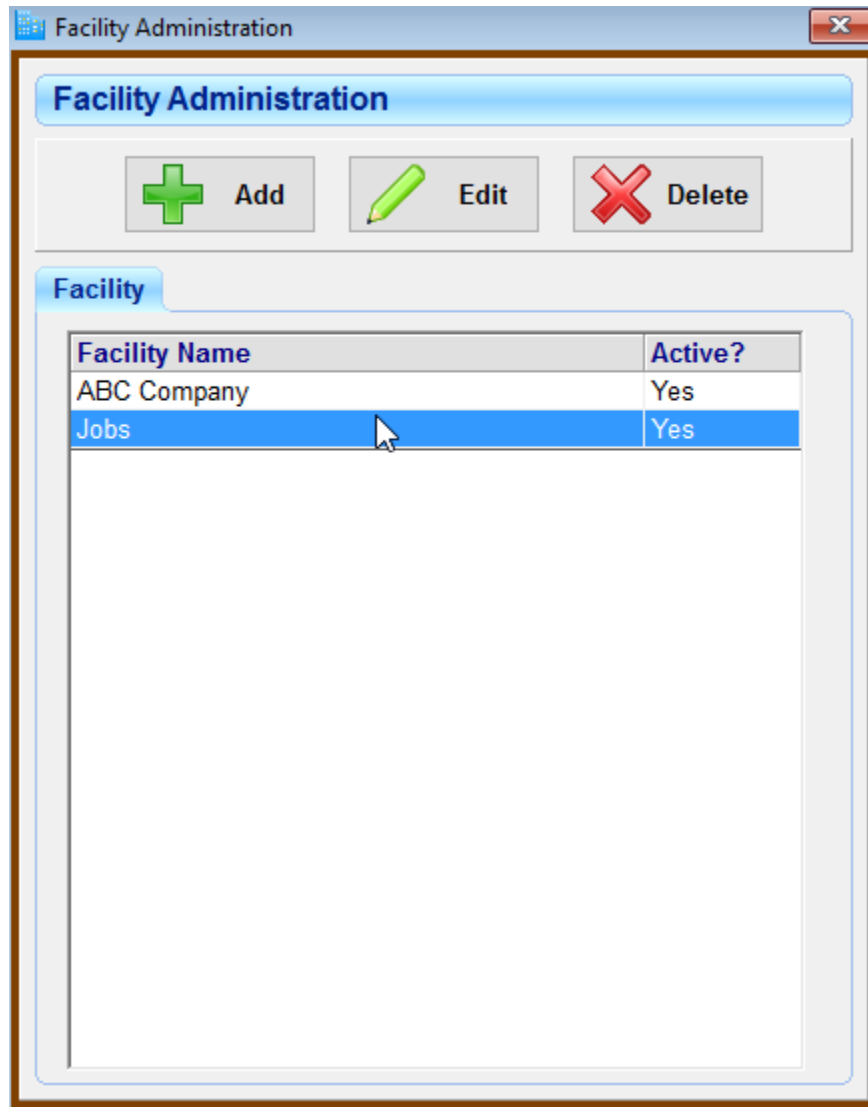
| Location         | Barcode | Responsible Individual | Storage? | Active? |
|------------------|---------|------------------------|----------|---------|
| Aisle 1          | L001    |                        | Yes      | Yes     |
| Aisle 2          | L002    |                        | Yes      | Yes     |
| Shelf A          | L003    |                        | Yes      | Yes     |
| Shelf D          | L004    |                        | Yes      | Yes     |
| Shop - North End | L005    |                        | Yes      | Yes     |
| Shop - South End | L006    |                        | Yes      | Yes     |

I can also use the Facility drop-down menu to look at ALL storage locations under ALL facilities.

The screenshot shows the 'Location Administration' window with the 'Facility:' dropdown menu set to 'All'. The table below displays all storage locations across all facilities:

| Facility       | Location         | Barcode | Responsible Individual | Storage? | Active? |
|----------------|------------------|---------|------------------------|----------|---------|
| ABC Building 1 | Garage           | L008    |                        | Yes      | Yes     |
| ABC Building 1 | Tool Crib        | L007    |                        | Yes      | Yes     |
| ABC Garage     | East End Garage  | L010    |                        | Yes      | Yes     |
| ABC Garage     | West End Garage  | L009    |                        | Yes      | Yes     |
| ABC Shop       | Shelf C          | L011    |                        | Yes      | Yes     |
| ABC Shop       | Shelf R          | L012    |                        | Yes      | Yes     |
| ABC Shop       | Shelf S          | L013    |                        | Yes      | Yes     |
| ABC Warehouse  | Aisle 1          | L001    |                        | Yes      | Yes     |
| ABC Warehouse  | Aisle 2          | L002    |                        | Yes      | Yes     |
| ABC Warehouse  | Shelf A          | L003    |                        | Yes      | Yes     |
| ABC Warehouse  | Shelf D          | L004    |                        | Yes      | Yes     |
| ABC Warehouse  | Shop - North End | L005    |                        | Yes      | Yes     |
| ABC Warehouse  | Shop - South End | L006    |                        | Yes      | Yes     |

It is also highly recommended that you create pseudo facilities to represent groups. For example, if you plan on checking out to jobs, it is best to create a new facility named “Jobs” or “Jobsites” or “Customers”.



You can then list all of your specific jobsites as Locations under the “Jobs” facility. These will all be “Checkout/Usage Locations”.

**Location Administration**

Save Cancel

Add New Facility Add New Employee

Facility: Jobs Responsible Individual: Smith, John

Location: Fern Town Hall Notes: Estimate - \$34,500  
Est Completion Date - 05/01/18

Barcode: FTH2017

Checkout/Usage Location  
 Storage Location

Address: 123 Main Street  
Milwaukee, WI

Status  
 Active  Inactive

Please note that in the example above, I have filled out extra information that was not required. Only bolded fields (Facility, Location, Barcode) are required for entry.

Also, when a jobsite is no longer active, simply switch the Location status to 'Inactive'. Do not delete the Location out of the system. This way you save the historical history of the Location in case it is needed down the road.

If you have questions, please contact our support team at [support@gigatrak.com](mailto:support@gigatrak.com)