



Transfer Function

Thank you for using GigaTrak Software! This document explains the Transfer function of the Tool Tracking System.

There are 3 separate Types of Locations in the Tool Tracking System. A majority of customers **ONLY** use Storage and Checkout Locations. If you are only checking out to Employees, you may not have any Checkout Locations in the system. Everyone must have at least one Storage Location in the system to enter new Tools. Please note that every customer has their own thought process for structuring their Facilities and Locations.

Review on Facilities and Locations

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

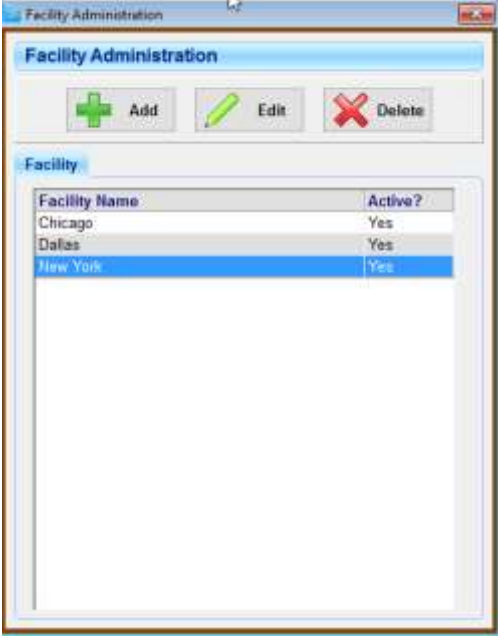
- Storage Location - Where an item is located when it is "Home" or where it's supposed to be when it's not being used
- Checkout Location – Where an item gets Checked out to or Used
- Transfer Location – Where an item gets transferred to in order to give it a new Storage Location

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", and move equipment/tools from one facility to another.

Each Facility that will be Transferring tools to another location will need to have at least one 'Transfer' location designated.

For example, Company ABC has three buildings and/or Facilities. Each building is setup as its own Facility.

- Dallas
- Chicago
- New York



ABC Company will also be checking tools out to jobsites so I will create a pseudo facility called "Jobs".



Each of these Facilities will have at least one Storage Location under them where Tools are kept in that specific Facility. You can choose to have just one Storage Location such as “Warehouse” or several Storage Locations such as “Aisle 1”, “Aisle 2”, “Aisle 3”, etc.

Below is the Chicago Facility with one Storage Location under it.

Location Administration

Save Cancel

Add New Facility

Facility: Chicago

Location: Tool Crib

Barcode: TOOLCRIB

Checkout/Usage Location
 Storage Location

Address:

Responsible Individual:

Notes:

Status
 Active Inactive

Location Administration

Add Edit Delete

Export To File Change Responsible Individual Print Barcode List Print Label

Facility: Chicago

Location	Barcode	Responsible Individual	Storage?	Active?
Tool Crib	TOOLCRIB		Yes	Yes

Next, is the New York Facility with multiple, specific Storage Locations under it. REMEMBER, every company has their own way of structuring the system. You can choose to get as specific or as general as you would like with your structuring.

The screenshot shows the 'Location Administration' window for the 'New York' facility. The interface includes a header with 'Add', 'Edit', and 'Delete' buttons. Below the header are buttons for 'Export To File', 'Change Responsible Individual', 'Print Barcode List', and 'Print Label'. A dropdown menu shows 'New York' selected. A table lists storage locations with columns for Location, Barcode, Responsible Individual, Storage?, and Active?.

Location	Barcode	Responsible Individual	Storage?	Active?
NY Aisle 1	L001		Yes	Yes
NY Aisle 2	L002		Yes	Yes
NY Aisle 3	L003		Yes	Yes
NY Storage Locker	L005		Yes	Yes
NY Tool Crib	L004		Yes	Yes

The Dallas Location will only have one Storage Location.

The screenshot shows the 'Location Administration' window for the 'Dallas' facility. The interface is similar to the New York facility, but the table only contains one entry: 'D Warehouse' with barcode 'D001'.

Location	Barcode	Responsible Individual	Storage?	Active?
D Warehouse	D001		Yes	Yes

Finally, if I plan on *checking tools out* to Jobs, I will add in all my jobsites, under the “Jobs” Facility. Because I am checking tools out to these locations, they will all be designated as “Checkout/Usage Locations”. You can even choose whether there is a responsible individual for a job.

The screenshot shows the 'Location Administration' form with the following fields and values:

- Facility:** Jobs
- Location:** Fern Town Hall
- Barcode:** FTH2017
- Responsible Individual:** Smith, John
- Notes:** Estimate - \$34500, Expected Complete - 05/01/2018
- Address:** 123 Main Street, Milwaukee, WI 53412
- Status:** Active (selected), Inactive

Note: Only bolded fields are mandatory. Facility, Location, and Barcode. Below is a list of all of jobsites added as Checkout/Usage Locations.

The screenshot shows the 'Location Administration' interface with a list of jobsites. The 'Facility' dropdown is set to 'Jobs'. The table below lists the jobsites:

Location	Barcode	Responsible Individual	Storage?	Active?
Clawson Ave	CA2017		No	Yes
Danny's Cafe	DC2017		No	Yes
Fern Town Hall	FTH2017	Smith, John	No	Yes
Milwaukee County	MC2017		No	Yes
Navy Pier	NP2017	Davis, Kevin	No	Yes
Steiner Electric	SE2017		No	Yes
Train Station	TS2017	Avery, Mark	No	Yes

When a jobsite is complete, simply mark the job as “Inactive”. Do not delete.
 Next, we will add in Transfer locations since we plan on transferring Tools between Chicago, Dallas, and New York. Each of these Facilities will need to have a Transfer Location under them.

Location Administration

Save Cancel

Add New Facility Add New Employee

Facility: Chicago Responsible Individual:

Location: CHI Transfer Notes:

Barcode: T001

Checkout/Usage Location
 Storage Location
 Transfer Location

Address:

Status: Active Inactive

Location Administration

Add Edit Delete

Export To File Change Responsible Individual Print Barcode List Print Label

Facility: Dallas




Location	Barcode	Responsible Individual	Storage?	Transfer?	Active?
D Transfer	T002		No	Yes	Yes
D Warehouse	D001		Yes	No	Yes





Dallas now has one Storage Location and one Transfer Location.

Below, New York has 5 Storage Locations and one Transfer Location.

Location Administration

Location Administration

 Add  Edit  Delete

 Export To File  Change Responsible Individual  Print Barcode List  Print Label

Facility:

Location	Barcode	Responsible Individual	Storage?	Transfer?	Active?
NY Aisle 1	L001		Yes	No	Yes
NY Aisle 2	L002		Yes	No	Yes
NY Aisle 3	L003		Yes	No	Yes
NY Storage Locker	L005		Yes	No	Yes
NY Tool Crib	L004		Yes	No	Yes
NY Transfer	T003		No	Yes	Yes

Next, we will Transfer a Tool from the Chicago Facility to the New York Facility. First, let's check the tools' current Storage Location.

The screenshot displays the 'Tool Information' window for a Milwaukee cordless drill. The tool's details are as follows:

Catalog:	2602-26	Barcode:	A001
Classification:	Hand Powered Tool	Asset Number:	
Type:	Cordless Drill	Condition:	Excellent
Description:	M18 Cordless LITHIUM-ION 1/2" Hammer Drill Drivers	Manufacturer:	Milwaukee
Facility:	Chicago	Model:	2602-26
Storage Location:	Tool Crib	Serial Number:	8563121
In Service Date:	11/01/2017	Funding Source:	
		Account:	

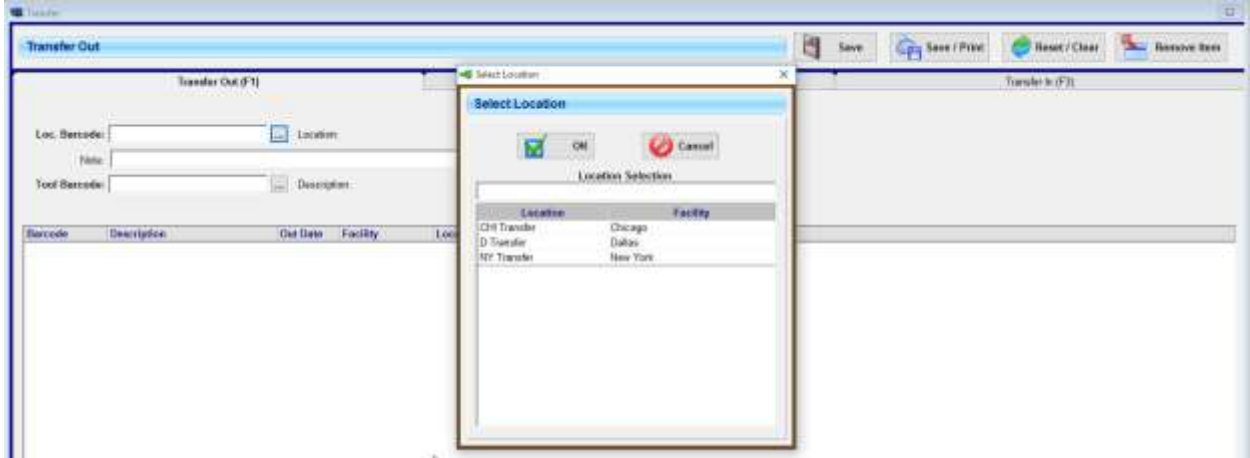
The 'Check Out' window is open, showing a 'To:' field and a 'Due Date:' field, indicating the tool is not currently checked out. A blue box highlights the 'Facility' and 'Storage Location' fields, with an arrow pointing to the text below. Another blue arrow points from the 'Check Out' window to the text below.

This Tool is not currently checked out anywhere, therefore it is in Storage.

Facility: Chicago

Storage Location: Tool Crib

Now, in the Transfer icon, we can Transfer out to the New York Facility.

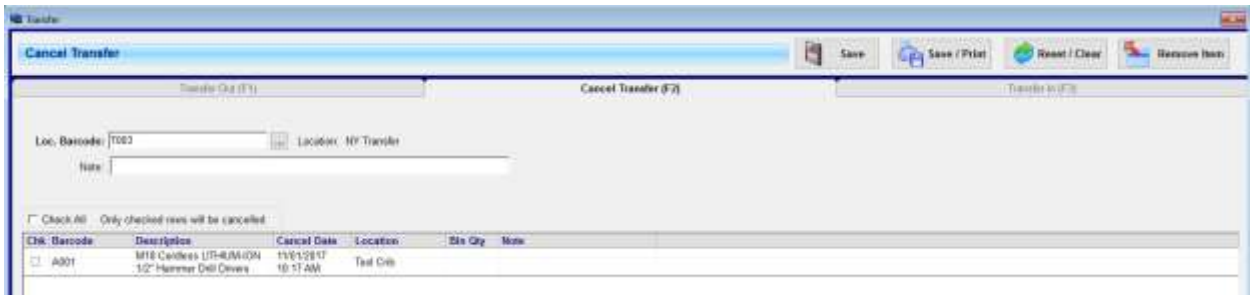


Choose where you would like to transfer to, and then pick the Tool barcode you would like to Transfer.



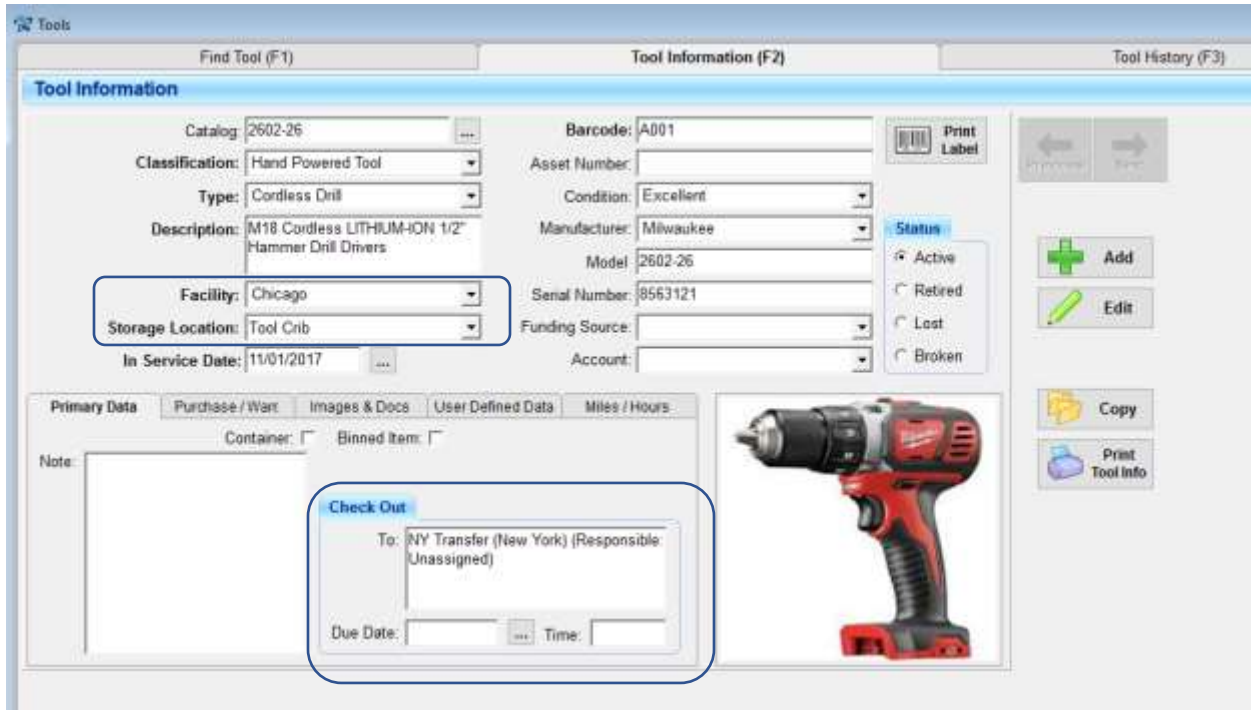
Press Save or Save/Print.

If that Tool never makes it to its new destination, you can Cancel the transfer on the F2 (Cancel Transfer) tab.



Press Save or Save/Print.

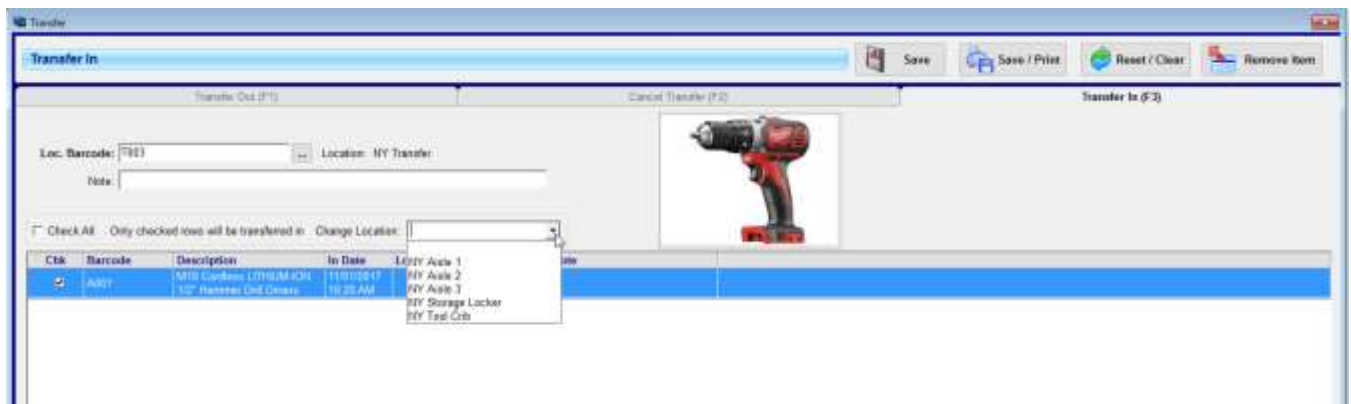
The Transfer of this Tool has now been started but not accepted in yet. In the interim, the Tool will show as Checked Out to the Transfer Location until it is accepted in to its new Storage Location or canceled.



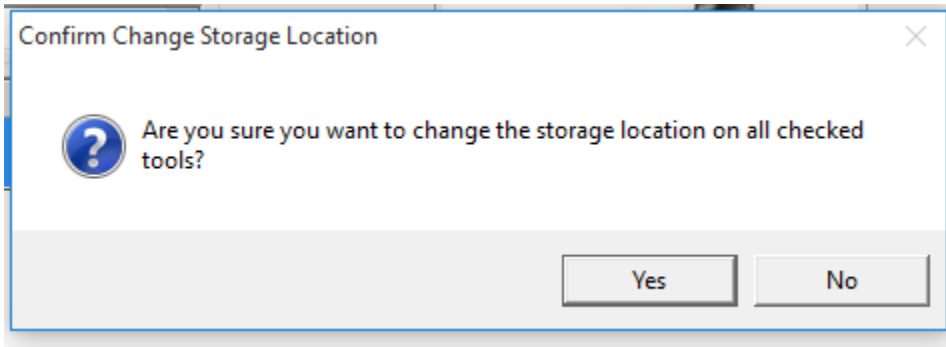
In the example above, the Tool Transfer has been initiated but it has not reached its final destination yet or accepted in by the New Facility. However, we can see that it is in process.

If the Tool makes it to the New Facility, they can accept the Transfer In on the F3 (Transfer In) tab. First, choose the Location you are accepting the Transfer in to. In this case, it's New York.

Check the box of the Tools you would like to Transfer In AND use the drop-down to pick the new Storage Location of the item. (Only Storage Location listed in the NY Facility will be available).

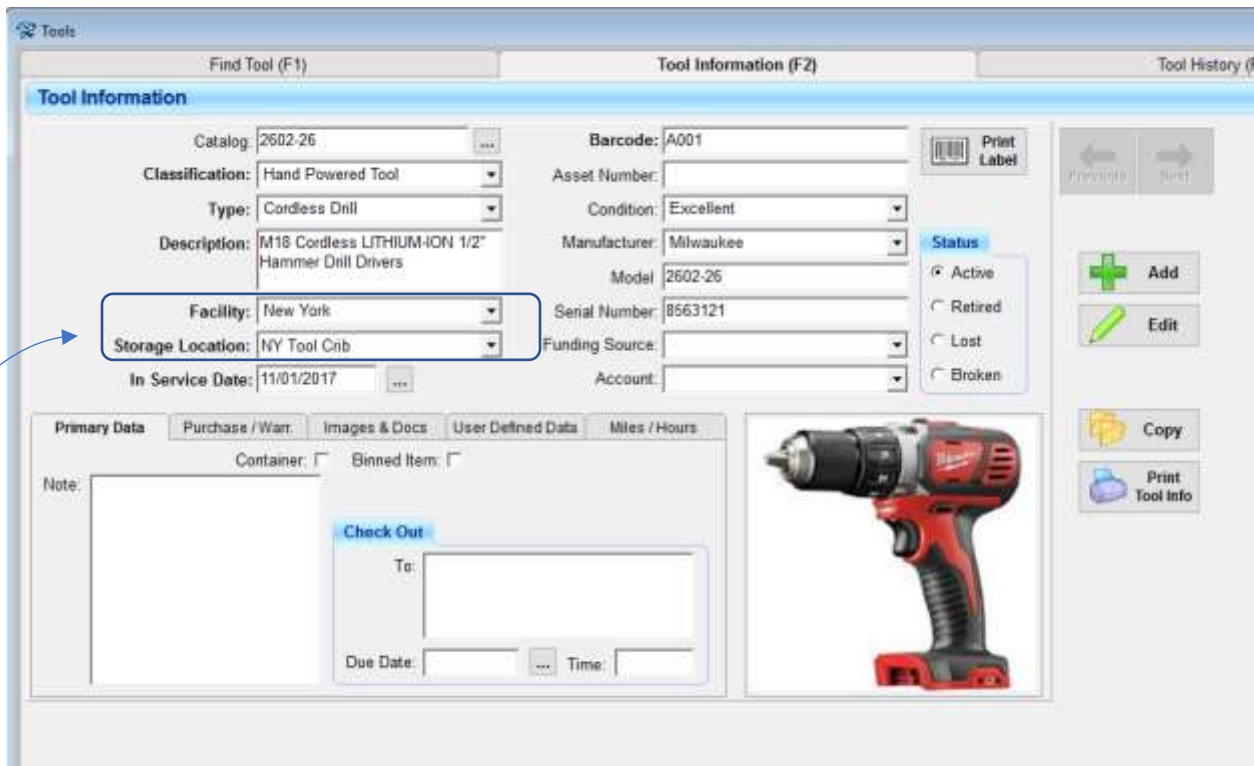


Once you choose a New Storage Location, the following will appear,



Hit YES and then press Save or Save/Print.

The Tool now has a new Storage Location in a new Facility.



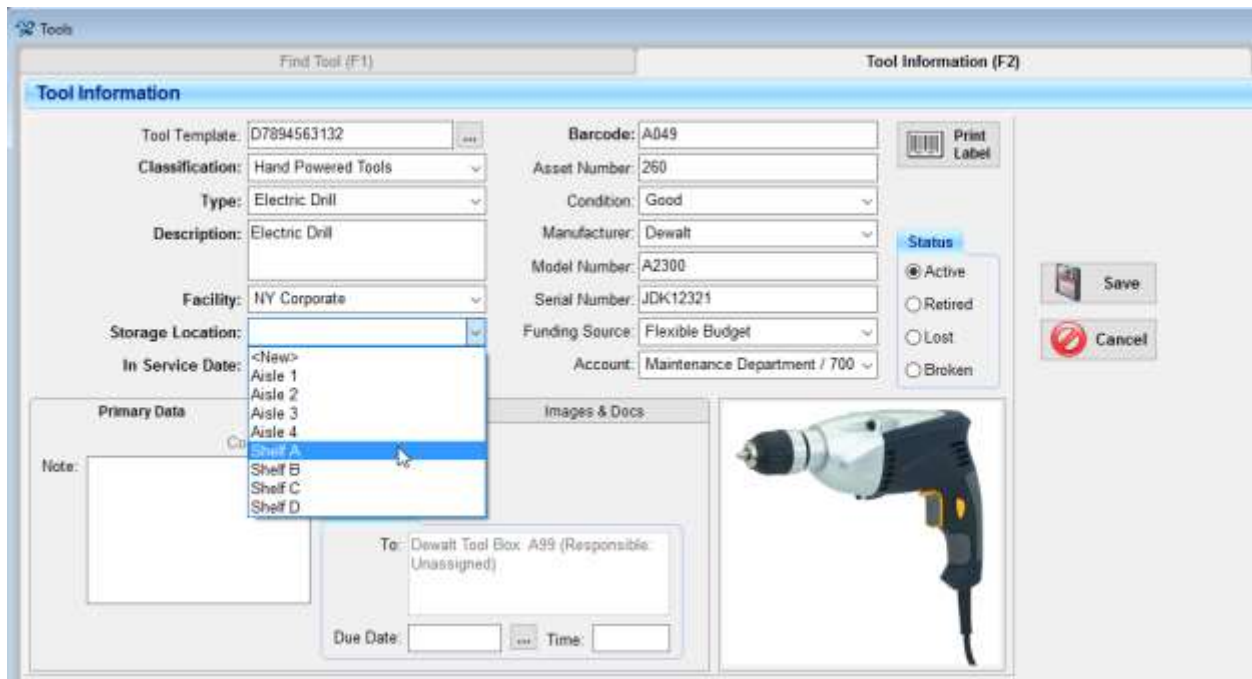
Facility: New York
Storage Location: NY Tool Crib

We can also see in the F3 (Tool History) tab the transaction that just occurred.



In conclusion, a Transfer Location is used to Transfer a Tool from one Storage Location to Another in SEPARATE FACILITIES. The Transfer Out tab is used for where you are sending the Tool. During the Transfer In, pick the Facility you would like to accept the Tool in to and choose its new Storage Location. Many customers use this function for multi-facility management and set their Transfer Locations up as Shipping and Receiving docks. The structure and names of Facilities/Locations will differ for every company.

*If you are changing the Storage Location of a Tool but keeping it in the SAME Facility, then you can simply edit the Tool on the F2 (Tool Information) tab.



If you have questions, please contact our support team at support@gigatrak.com