8. Tools | Work'N'Roll

8.1 Tools

8.1.1 From the home page, select the Tools section

8.1.2 Select All tools

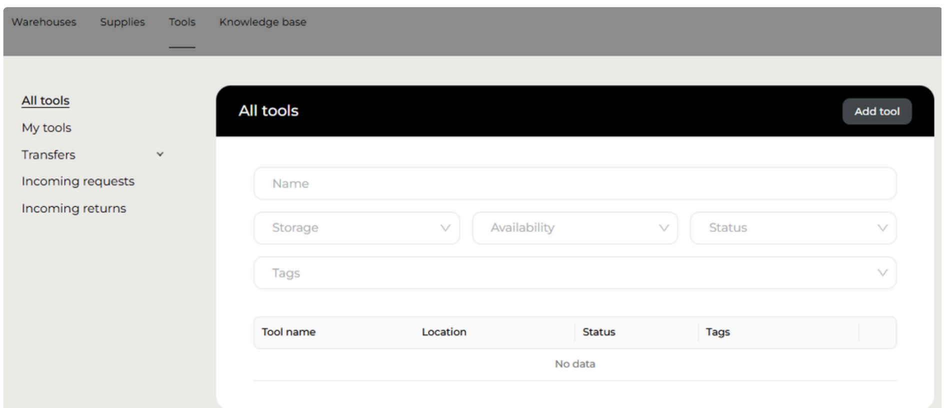

Figure 8.1 - All tools

8.1.3 Click Add Tool

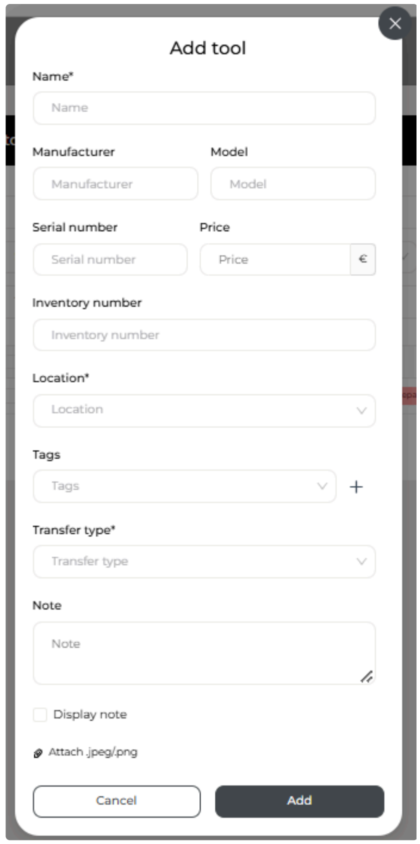

Figure 8.2 - Adding a tool

8.1.4 Enter the name of the instrument (required field)

8.1.5 Enter the manufacturer

8.1.6 Enter the tool model

8.1.7 Enter the serial number

8.1.8 Enter the cost of the tool

8.1.9 Enter the inventory number

8.1.10 From the drop-down list, select the location of the tool (required field)

8.1.11 Add tags

8.1.12 From the drop-down list, select the type of tool movement (required field)

> NOTE.
>
> The type of tool movement can be direct (without manager's confirmation) and with manager's confirmation. It is carried out to the company's warehouse, manager, worker, or subcontractor

8.1.13 Leave a note

8.1.14 Check the box next to the Display Note field

8.1.15 Attach the required file

8.1.16 Click Add

> NOTE.
>
> The added tool becomes available to both the owner and manager

8.2 Search

8.2.1 From the home page, select the Tools section

8.2.2 Select All tools

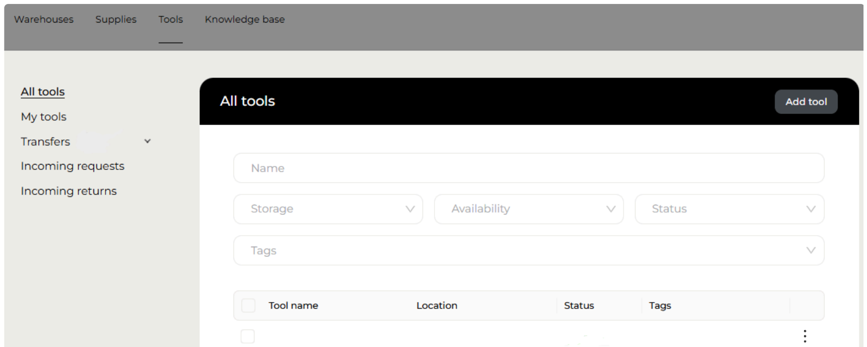

Figure 8.3 - Finding a tool

8.2.3 Search by instrument name, instrument location, instrument status, instrument status, tags

8.3 Tool management

8.3.1 In the field with the added tool, click on the icon with three dots

NOTE.

You will see a drop-down list with a list of actions

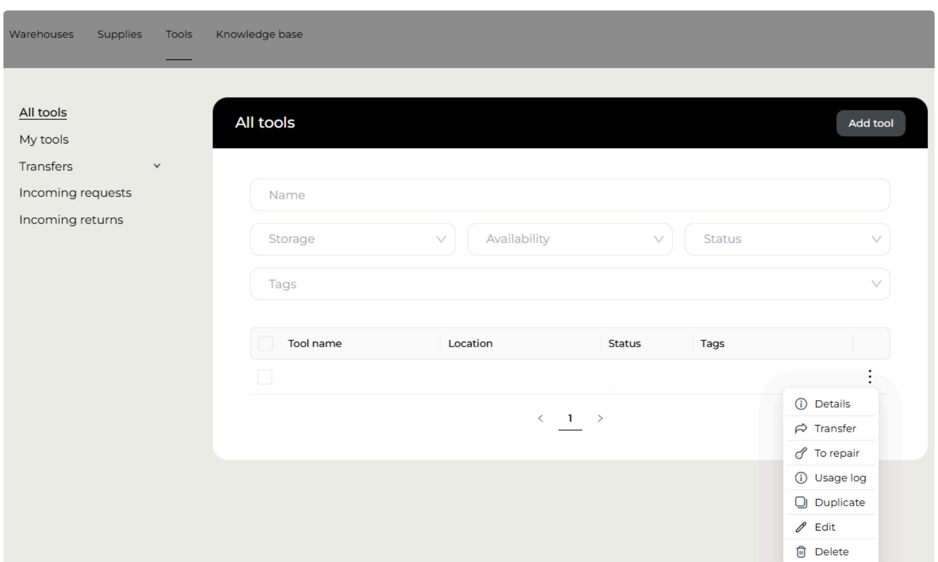

Figure 8.4 - Tool management

8.3.2 Select More

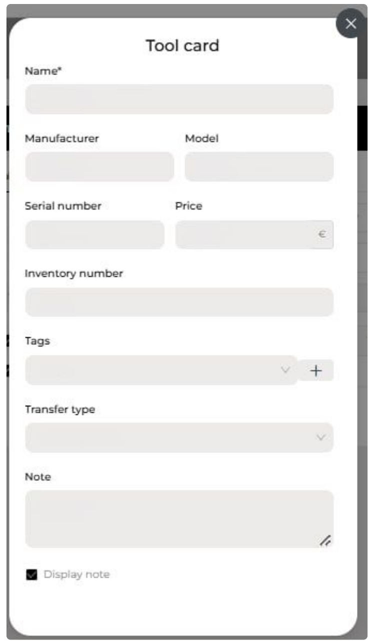

Figure 8.5 - Tool card

8.3.3 The Tool card window that opens contains all information about the tool

8.3.4 Click on the icon with three dots in the field with the desired material, select Move from the drop-down list

NOTE.

A tool can be moved between users with the roles of owner, manager, worker and subcontractor.

A tool can be moved from the company warehouse to a worker initiated by a user with the role of owner or manager.

8.3.5 In the Tool transfer window that opens, select User

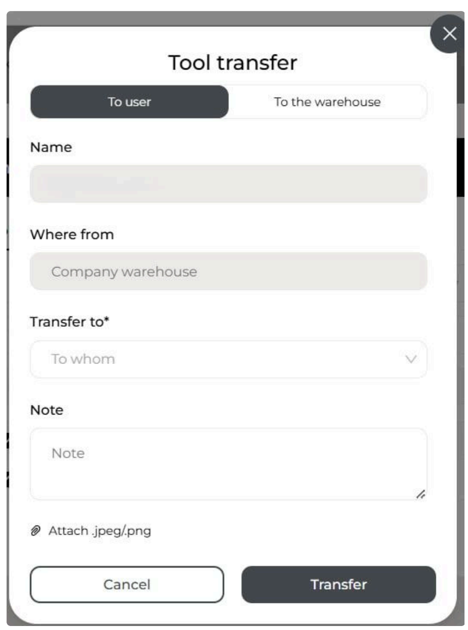

Figure 8.6 - Tool transfer

8.3.6 Name of the instrument and Where from of the instrument are filled in automatically

8.3.7 From the Transfer to drop-down list, select the responsible executor (required field)

NOTE.

When you move a tool and select the transfer type Without manager confirmation, the tool is directly moved to the selected employee. Information about this tool transfer is displayed in the Outgoing transfer section.
In the Incoming transfer section, the incoming tool will be displayed. In this window, you should confirm the receipt of the tool by clicking on the Accept button.
If you approve the transfer - the status of the tool changes to Used. If you reject the transfer - the status of the tool is Free.

In case the manager wants to move a tool to a worker, but other workers have requested this particular tool, then after the transfer to (1st) worker is authorized - all other transfer requests will be automatically canceled.

When moving a tool from a worker to a worker with the With manager's confirmation type selected - in this case the request goes to the manager for approval. The manager will see the information about the incoming move in the Incoming requests section.
The worker who receives the tool will not be able to see the tool movement until the manager approves the movement. Once the tool move has been approved, the tool information will be reflected to him in the Incoming Move section. In this window it is necessary to confirm the receipt of the tool by clicking on the Accept button.

8.3.8 Leave a note

8.3.9 Attach a file

8.3.10 Click Move

8.3.11 In the Tool transfer window that opens, select To Warehouse

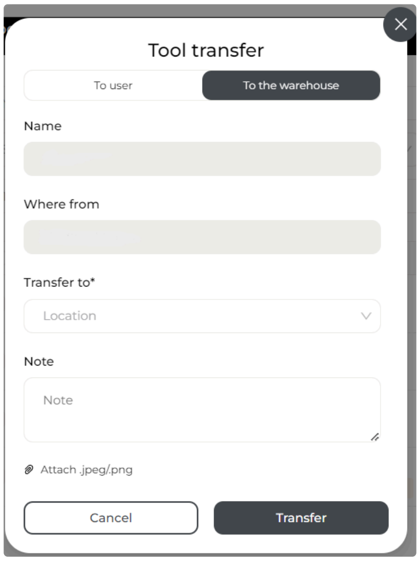

Figure 8.7 - Transfer tools into the warehouse

8.3.12 The Name of the tool and Where from of the tool are filled in automatically

8.3.13 From the drop-down list Transfer to select the company warehouse (required field)

8.3.14 Leave a note.

8.3.15 Attach the file

8.3.16 Click Transfer

NOTE.

Only a user with the status Owner or Manager can move a tool to the warehouse.
When moving a tool to a warehouse, the tool is directly moved to the selected location.
Information about moving a tool can be found in the Outbound Transfer section.

8.3.17 Click on the icon with three dots in the field with the required material, select Repair from the drop-down list

Figure 8.8 - Confirmation of repairs

8.3.18 In the window that opens, confirm sending the tool for repair

8.3.19 After confirmation this tool will change its status to In repair

NOTE.

In case the status of an instrument is In Repair, all requests/movements for that instrument are unavailable.

8.3.20 Click on the icon with three dots in the field with the desired material, select Usage Log from the drop-down list

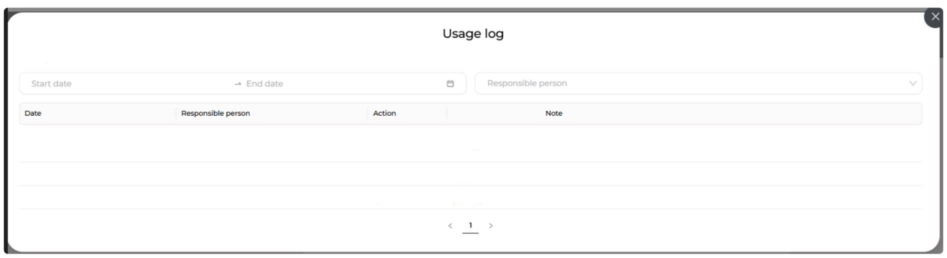

Figure 8.9 - Usage Log

8.3.21 Search by receipt date, instrument expiration date, or by responsible person.

8.3.22 Click on the icon with three dots in the field with the required material, select Copy from the drop-down list

NOTE.
In the window that opens, all fields except tags and note are already filled in. Edit the data if necessary

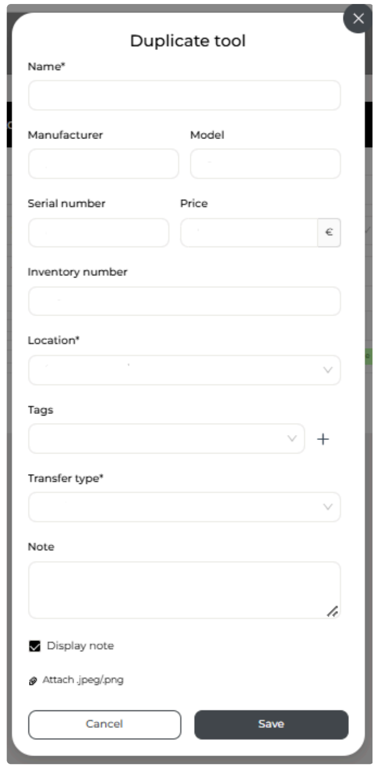

Figure 8.10 - Duplicate tool

8.3.23 In the Create tool copy window that opens, enter the name of the tool (required field)

8.3.24 Enter the tool manufacturer

8.3.25 Enter the tool model

8.3.26 Enter the serial number

8.3.27 Enter the cost of the tool

8.3.28 Enter the inventory number

8.3.29 From the drop-down list, select the location of the tool (required field)

8.3.30 Select tags from the drop-down list, or add new tags

8.3.31 From the drop-down list, select the type of tool movement (required field)

8.3.32 Add note

8.3.33 Check the box next to Display Note

8.3.34 Attach the required file

8.3.35 Click Save

8.3.36 Click the three-dot icon in the field with the desired material, select Edit from the drop-down list

8.3.37 Edit the tool information

8.3.38 Click on the icon with three dots in the field with the desired material, select Delete from the drop-down list

8.3.39 Confirm the deletion of the tool card

8.4 My tools

8.4.1 From the home page, select the Tools section

8.4.2 Select All tools

8.4.3 Click on the icon with the three dots

NOTE.

You will see a drop-down list with a list of actions

The employee may only use the following functions: request, clarify, move, and return the tool

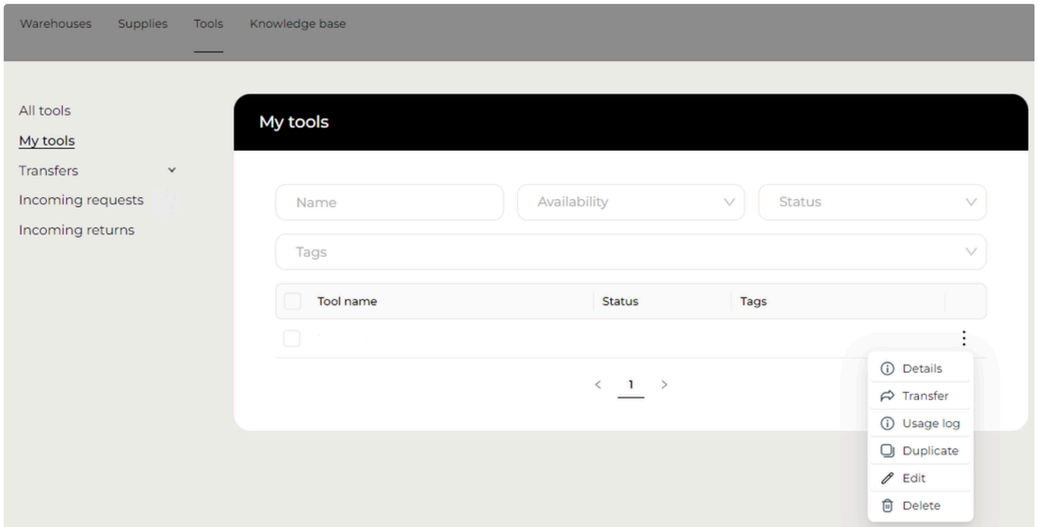

Figure 8.11 - My tools

8.4.4 Select Details

Next See section 8.3.2

8.4.5 Click on the icon with three dots in the field with the required material, select Move from the drop-down list

Next Refer to section 8.3.4

8.4.6 Click on the icon with three dots in the field with the required material, select Usage log from the drop-down list

Next Refer to 8.3.20

8.4.7 Click on the icon with three dots in the field with the required material, select Copy from the drop-down list

Next See section 8.3.22

8.4.8 Click on the icon with three dots in the field with the required material, select Edit from the drop-down list

Next See section 8.3.36

8.4.9 Click on the icon with three dots in the field with the required material, select Delete from the drop-down list

8.4.10 Confirm the deletion of the tool card.

8.5 Tool transfer

8.5.1 Incoming transfers

8.5.1.1 From the home page, select the Tools section

8.5.1.2 Go to Transfers

8.5.1.3 Select Incoming transfers

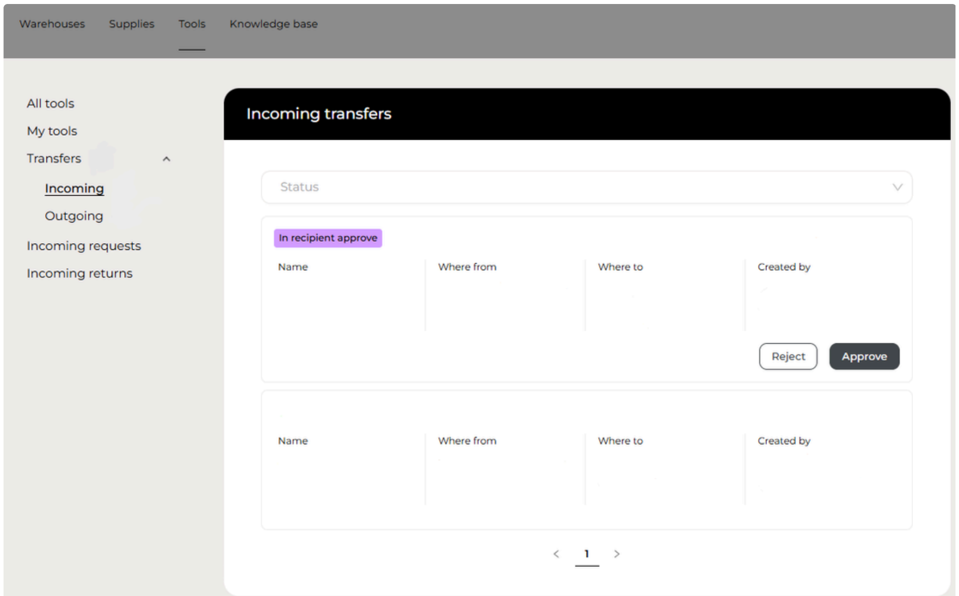

Figure 8.12 - Incoming transfers

8.5.1.4 Use the instrument status search

8.5.1.5 Click Reject or Approve the instrument transfer

NOTE.

All incoming tool information is displayed in the Incoming transfers section

8.5.1.6 View information about the incoming tool transfer: name of the tool, where the tool is transferred from and to, by whom it was created

8.5.2 Outgoing Transfer

8.5.2.1 From the home page, select the Tools section

8.5.2.2 Go to Tool Transfer

8.5.2.3 Select Outgoing Transfer

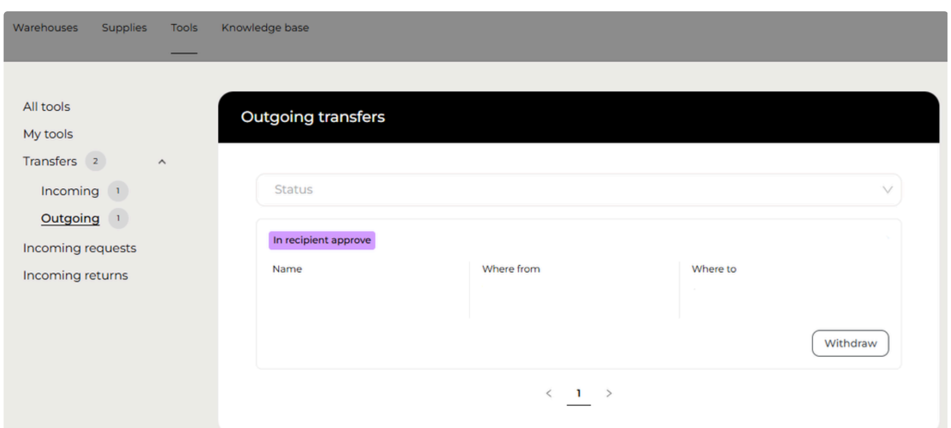

Figure 8.13 - Outgoing Transfer

8.5.2.4 Select the material status from the drop-down list

8.5.2.5 Click Withdraw

NOTE.
All information about the instrument transfer is displayed in the Outgoing Transfer section

8.5.2.6 View information about the outgoing material transfer: the name of the material, where the material is being transferred from and where it is being transferred to

8.6 Tool request

8.6.1 Incoming request

8.6.1.1 From the home page, select the Tools section

8.6.1.2 Go to Incoming requests

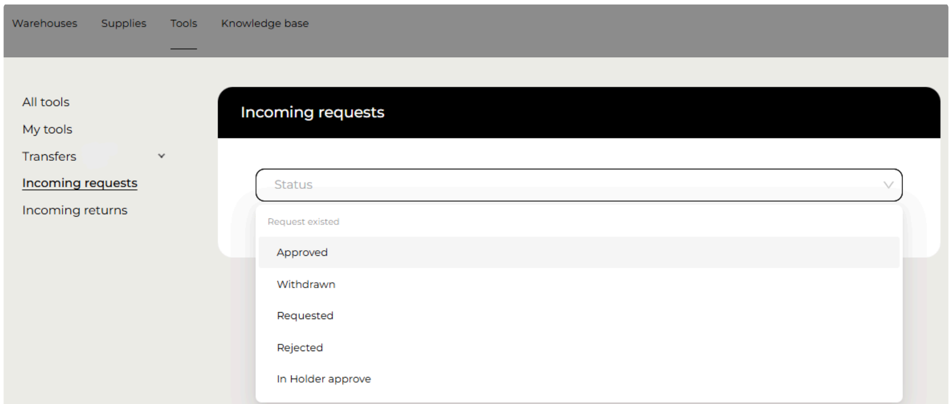

Figure 8.14 - Incoming request

8.6.1.3 From the drop-down list, select the status of the incoming request

8.6.1.4 Click Reject or Approve the instrument request

NOTE.

Notification of the tool request is displayed to the owner in the Incoming Request section. To approve the request, the Approve button must be clicked.

8.6.2 Outgoing requests

NOTE.
The tool request function is only available to the supervisor.

The supervisor can submit a request for a tool from the company's available inventory or for a new tool. After submitting a request, you must wait for approval from the company owner.

The information about the tool request is displayed in the Outgoing requests section for the supervisor.

8.6.2.1 Go to My Tools

8.6.2.2 Select Tool Request

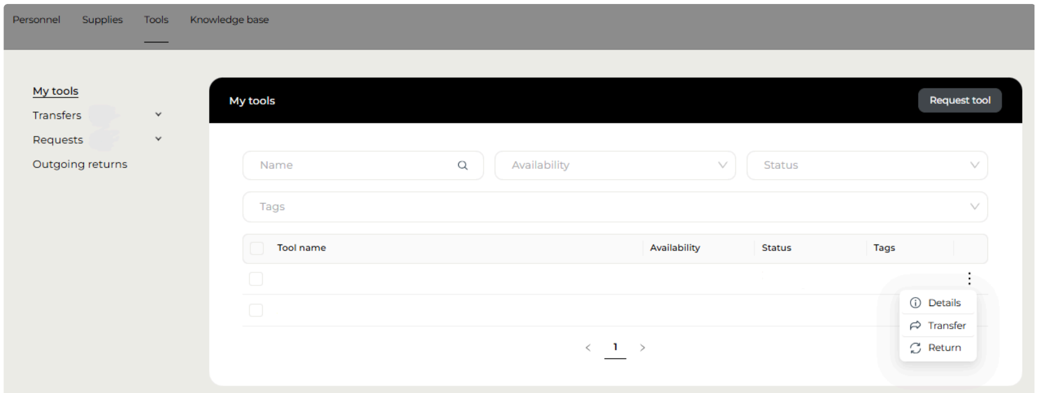

Figure 8.15 - Tool Request

8.6.2.3 Go to Inventory

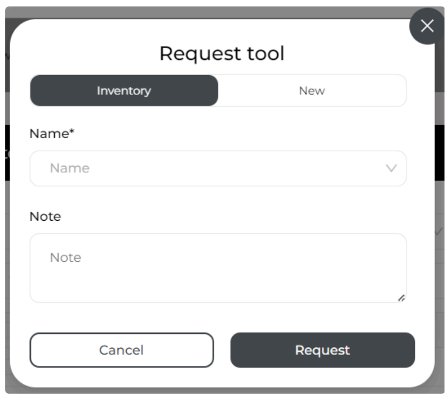

Figure 8.16 - Tool Request

8.6.2.4 Select the name of the tool from the drop-down list (required field)

8.6.2.5 Add a note

8.6.2.6 Click Request

8.6.2.7 Go to New

8.6.2.8 Enter the name of the tool

8.6.2.9 Add a note

8.6.2.10 Click Request

8.6.2.11 From the home page, select the Tools section

8.6.2.12 Go to Outbound Requests

8.6.2.13 From the drop-down list select the required status of the outgoing request

NOTE.

Information about the tool request is displayed at the supervisor in the Outgoing requests section.

The owner or manager can revoke the tool using the Withdraw option.

8.7 Tool return

8.7.1 Incoming Returns

8.7.1.1 From the home page, select the Tools section

8.7.1.2 Go to Incoming Returns

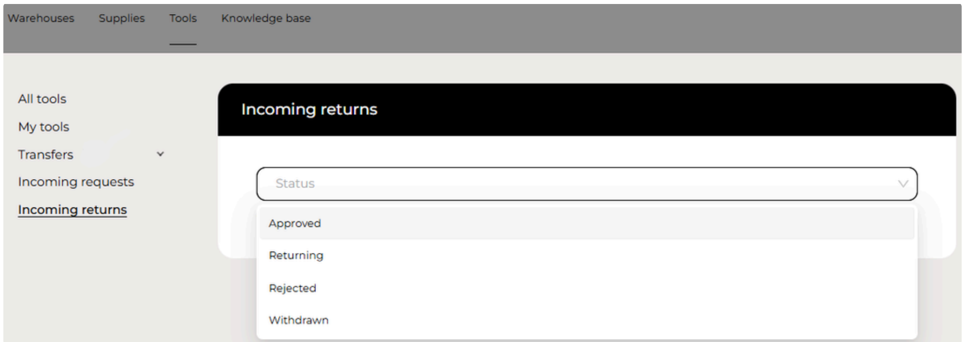

Figure 8.17 - Incoming Returns

8.7.1.3 From the drop-down list, select the desired status of the incoming return

> NOTE.
>
> The tool return will be displayed to the owner/manager in the Incoming returns section. In this window it is necessary to confirm the acceptance of the tool by clicking on the Accept button.

8.7.2 Outgoing returns

> NOTE.
> The supervisor has the function to process the return of the tool to the warehouse

8.7.2.1 Go to My tools

8.7.2.2 Check the box next to the desired tool

8.7.2.3 Select Return from the drop-down list

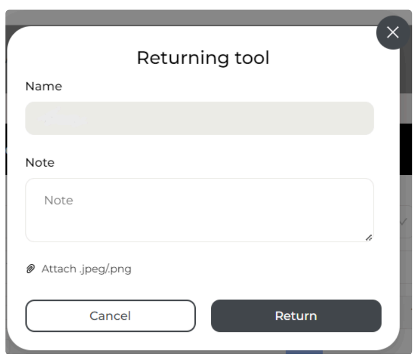

Figure 8.18 - Tool return

8.7.2.4 In the Return Tool window that opens, leave a note

8.7.2.5 Attach the required file

8.7.2.6 Click Return

> NOTE.
> This transfer will appear with the supervisor in the Outgoing Returns section