



Equipment

Menu: Focus | Equipment Inventory

Equipment Inventory

The **Equipment Inventory** allows a Local Authority to maintain a record of all types of equipment, especially items available to a Support Service, e.g. wheelchair, hearing device. The equipment is available for allocation to Students and Bases. Equipment Inventories should be kept discrete for different business areas, e.g. a user looking after SEN equipment should not necessarily be able to access/update equipment used for CSS. A Service Team can have many items of equipment assigned to it, but an item of equipment can only be assigned to a Service Team at any one time.

Equipment Inventory Search: You can search on any of the fields, **Service Team** is mandatory. Click to open **Service Team Chooser**. **Search** for item of Equipment. Highlight a record and click **Open** to view **Equipment Details**. Click **New** to open [New Equipment Inventory].

Highlight a record and click **Open** to view **Equipment Item Details**. You can **Add**, **Edit**, and **Remove** an Equipment Item (if in your Service Team). You can view the **History** of the record and an Equipment Item can be **Cloned**.

New Equipment Inventory | Equipment Details: Select **Category** (*Table_ID 0745*) Enter **Make**, **Model** and **Description** or **GenericFlag** (one of many similar items). **Number In Stock** is automatically populated. You cannot **Save** until an **Equipment Item** has been added. Click **Add** to enter:
 1. **Purchase Order Details**
 2. **Equipment Item Details**



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Equipment Inventory

[New Equipment Item Details]

Save Memo

A *Memo* specific to equipment can be added here

1. Purchase Order Details 2. Equipment Item

1. Purchase Order Details

Purchase Order No

Purchase Date

Purchase Price

Manufacturer Warranty Expiry Date Supplier Delivery Date

Supplier

1. Purchase Order Details:
These fields are read-only. Enter the information from the **Purchase Order No**

Purchase Order Details

Select

Purchase Order No	Purchase Date	Purchase Price	Manufacturer Warranty Expiry Date	Supplier Delivery Date	Supplier Details
111	04/03/2011	111	03/03/2014	01/03/2011	
	13/12/2004	10			

New Equipment Item Details | Purchase Order Details:
Select existing **Purchase Order** or create **New**.

Purchase Order [CCS.Entity.EquipmentPurchaseOrder]

Save New

Purchase Order

Purchase Order

Purchase Order No Purchase Date

Purchase Price Manufacturer Warranty Expiry Date

Supplier Delivery Date

Supplier Details

Purchase Order:
Enter **Purchase Order No** and **Purchase Price**. Use calendars to select **Purchase Date**, **Manufacturer Warranty Expiry Date** and **Supplier Delivery Date**.
Select **Supplier Details** from Save.

2. Equipment Item Details

Service Team

Inventory Number Security Number

Manufacturer Serial No. Status

Location

Date available For Loan Portable Appliance Testing

Test Date Charger

Creation Date Disposal Date

Disposal Reason

2. Equipment Item Details:
Select **Service Team**
Enter **Inventory Number**, **Security Number**, **Manufacturer Serial No.** and **Location**.
Select **Status** (*Table_ID 0746*) and **Portable Appliance Testing** and **Charger** if applicable.
Use calendars to select **Date available for Loan**, **Test Date**, **Creation Date**. Select **Disposal Date** and **Disposal Reason** (*Table_ID 0747*) if necessary. Save.



Equipment

Menu: Focus | Person/Base | Links panel | Equipment

Equipment Loan Summary

The **Equipment Loan Summary** is accessed from the **Links** panel on a Person or Base record. Equipment can be loaned to Subjects e.g. laptops for SEN Statemented pupils, or to Bases for allocation to students.

Links

- Activities
- Carers
- Communication Log
- Court Orders
- Equipment**
- Involvements
- Looked After Child Provision
- Risks
- Social Network
- Special Transport Needs

Equipment Loan Summary [Ben Abbot]

Search Collapse

Equipment Loan Enquiry

Service Team

Include Previous Equipment

New Delete Open Open In New Window Next Previous

Start Date	Due Back Date	End Date	Inventory No	Category	Make	Model	Description	Service Team
01/03/2011			Radio Aid	RA2	RA2	Radio Aid 2	CSS Service	

Equipment Loan Enquiry: Use to limit the search results to a particular **Service Team**.

Equipment Loan Details [View/Edit Equipment Loan Details]

Save New Memo

Equipment Item Equipment Loan

A Memo specific to equipment can be added here

Equipment Item

Inventory No Security No

Manufacturer Serial No Category Radio Aid

Make RA2

Model RA2

Description Radio Aid 2

Repair/Test Status

Equipment Loan

Start Date Due Back Date

End Date Loan Requested Date

Repair/Test Required

The browse displays the list of **Equipment Items** with the read-only **Equipment Loan Details** below. Highlight a record to **Open** or **Open In New Window**. If required create a **New Loan** from the Equipment Inventory.

Equipment Item: Equipment Item information is read-only

Equipment Loan: If not already entered, enter the dates relating to the **Equipment Loan** and whether a **Repair/Test** is Required. **Save**.

Cannot add loan record, this Equipment was already On Loan during this period.

Validation: You cannot overlap loan periods

Access Control List functionality is available on the Equipment Loan record, this allows a person with System Administrator rights to set user read-write access to the Equipment Loan details.

Related Reference Guides:

- RG_ACL_ACL Definition