

Version 25



Trapeze

Enterprise Asset Management

Allocation and Assignment

Administrator Guide

Trade Secret | February 2025

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Technical Support

Trapeze provides several ways to connect with the Customer Care team. Please provide detailed information to the representative. If you are reporting an issue by e-mail, include any error messages, screen shots of your problem, and steps to replicate the issue.

Customer Care is available Monday through Friday, 8:00 a.m. to 8:00 p.m., Eastern Standard Time.

Toll-Free Telephone: 1-877-411-8727

E-mail: cc@trapezegroup.com

FTP Site: <https://ftps.trapezegroup.com/>

Web Site: <https://collaborate.trapezegroup.com>

The website provides access to Trapeze Collaborate which offers resources to implement and operate the software, search knowledge, participate in communities, log/track service requests, sign-up for release alerts, view product health recommendations, and download updates or documentation. For secure access to Collaborate, contact Customer Care through the website or by calling the number above.

Product Compatibility

Refer to the latest [Product Compatibility](#) information on Trapeze Collaborate for requirements including operating system information, databases, Crystal reports, network protocol, HTTP servers and browsers that are supported.

Allocation and Assignment - Administrator Guide

Version 25.x

February 2025

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1. Overview

Allocation and Assignment Portal

Current Location: ZSLOC-001 - ZS LOCATION
Layout
Refresh 5 minutes

View Requests
Assign New Item

Recent Assignments
Current Filter: UNFILTERED
Modify Filters

No	Item	Type	Qty	Assign to ID	Ass
1081	GLOCK-17-0	PART	1.00	SRV01	OPER/J
1075	REMINGTON-M700-TACT-CH-0	PART	1.00	ZSEQP-002	ASSET
1069	TSHIRT-0	PART	1.00	ZSOP	OPER/J
1068	TSHIRT-0	PART	1.00	ZSOP	OPER/J
1067	ZSEQP-002	ASSET	1.00	ZSEQP-001	ASSET
1066	APX8000-0	PART	5.00	ZSOP	OPER/J

Showing 254 records

Web Screens

- Allocation and Assignment
- Assignment Request
- Assets - Primary Information
- Components - Primary Information
- Parts - Primary Information
- Parts - Location Information
- Parts Issues and Returns
- Parts - Direct Issues
- Parts - Transfers
- Parts - Adjustments
- Serialized Parts

Request Summary

- 83 New Item Requests
- 7 Transfer Requests
- 34 Replacement Requests
- 124 Total Requests

New Item
Transfer
Replacement

Item Search
Asset ID - Part ID - Serial Number - Description
Go

Operator Search
Operator ID or Name - Employee ID or Name - User ID
Go

Inspection Summary
Services / Inspections Due: 0

The Allocation and Assignment Module is designed to allow an asset or part to be assigned to a person (operator), place (location or department) or another asset. There are two parts to the module: Allocation and Assignment Portal and Assignment Request Portal.

The Quartermaster can use the Allocation and Assignment portal to create assignment records for items and track the status and expiration of those items. He or she can also use this portal to view requests for items from operators for either themselves or their location/department.

The operators have access to the section of the module called the Assignment Request Portal. Through the Assignment Request Portal, a user can log in to either request a new item or report an issue with their current item. These requests then are sent to the Quartermaster section of the module, so that they can be responded to as needed by supervisors and the store manager.

The Allocation and Assignment Module works with the Shop Activity Module's Storekeeper Portal for inventory tracking, purchase orders (POs) and Requisitions. The items and inventory purchased and tracked through Storekeeper Portal, based on each location, are the same inventory that the Quartermaster has access to assign within the Allocation and Assignment

Portal. Please refer to the *Shop Activity Storekeeper Administrator and User Guides* for additional information about the Storekeeper Portal.

Requirements

This software requires the software application and Web Modules as outlined in the *Administrator Guide*.

Assumptions

This Module Guide assumes familiarity with workflows and configurations of the application.

- ❗ Do not use this module in a shared tab with another module (such as Storekeeper, Technician, etc.) as it could cause unexpected behavior. This module must be set on its own tab for proper functionality. For more information, refer to the *Administrator Guide Section 2. Web Modules Configuration, Adding Modules and Tabs*.
- The intended audience for this Allocation and Assignment Module Administrator Guide includes Information Technology (IT) staff. Please ensure that the individual installing and configuring the Allocation and Assignment Module is from your IT department.
- ❗ Special characters are not supported in all Web Module fields and unanticipated results may occur.
 - User defined required fields that do not appear in Web Module forms will return validation messages.
- ❗ Do not use the browser's **Back** button in the Web Modules as unanticipated results may occur.
- ❗ Do not open or use the same instance of the Web Modules in multiple browser windows or tabs. This can cause errors or unexpected performance issues.

Installation

Please refer to the *Administrator Guide, Install and Configure Web Modules* section for instructions on installing and upgrading Web Modules.

To make the functions of this Portal available to Web Modules users, create the tab and assign rights for supervisors. Please refer to the *Administrator Guide, Web Modules Configuration - Adding Modules and Tabs* section for detailed instructions on adding new tabs and configuring security access for those tabs.



This module does **NOT** support anonymous access to “All Users”. A user must be logged into Web Modules for this module to function.

Definitions

Quartermaster: For the purpose of this document and Module, we refer to the *Quartermaster* as the person (or persons) who manage assignments and/or inventory for one or more locations within an organization. This title is used regardless of the job title at any specific organization. This position may be called Storekeeper, Inventory Manager or otherwise also; but for the purposes of the Allocation and Assignment portal, we will refer to this role as a *quartermaster*.

Operator: Any person that can use and be assigned equipment, identified by Operator ID (i.e., to assign assets/parts to a person, that individual must have an Operator ID). We will refer to an operator, for the purpose of this portal, as anyone who can be assigned equipment or operate that equipment.



Allocation and Assignment portal (Quartermaster portal) requires that the logged-in User must also have an associated Employee ID.



Assignment Request portal requires only a User ID (no associated Employee ID or Operator ID is required, though assigning an Operator ID is recommended).



Assignments to a person can only be made to someone with an Operator ID, though that Operator does not need a User ID if he/she does not plan to use either portal.

2. Allocation and Assignment Module Basic Settings

Allocation and Assignment Portal Settings

Allocation and Assignment has a Settings area available through the edit pencil icon next to the Allocation and Assignment portal name.



Note: There are several required settings to use this portal. If you do not set a required setting, or leave before all requirements are met, an error displays stating that “All required fields must be set.”

The settings available are as described in the following sections.

Portal-wide Options:

- **Date/Time Values in 24 hour or 12 hour format:** Select either 12 or 24 hours in the drop-down menu.
- **Allow users in this group to set Approval Status:** Select user groups using the chooser button to allow users in the chosen groups to set the approval status. Select a single group and click **Remove** to remove the one, or click **Remove All** to remove all groups in the current list.
- **Allow users in this group to action Direct Transfers:** Select user groups using the chooser button to allow users in the chosen groups to action. Select a single group and click **Remove** to remove the one, or click **Remove All** to remove all groups in the current list.

Assignment Request

Allow users in this group to set Approval Status: Groups in this field will have access and rights for the settings below for approving requests.

Select User group ID

User group ID Starts with:

And User group ID contains:

1 item(s) found

User group ID	Description
WARRANTY	WARRANTY

Search Reset

Add all 1 items

SYSADMIN

Remove Remove All

Apply

Page 1 of 1

To add user groups to approval rights:

1. Use the chooser button to open the user group ID chooser.
2. Select the user group ID, or click **Add all # items** for all groups in the table, to add the IDs to the field on the right.
3. To remove a group from the field on the right, select the group and click **Remove**, or click **Remove All** to remove all group IDs.
4. When you are ready to apply the groups in the field on the right to the approval rights, click **Apply**.

Other Assignment Request Settings

- **Require Approval:** Use the checkboxes for **New Items**, **Transfers**, and **Replacements** to choose which requests require approval. If none of the checkboxes are checked, approvals are allowed on items, but not required. If a user is approving two different types of requests (such as new item and a transfer), where one type is required and one is not, the required field will display as the standard required setting.
- **Assignment Request Types:** Use the checkboxes for New Items, Transfers, and Replacements to choose which assignment request types to allow.
- **Show Request Summary count as:** Choose which way to display the summary counts. Options are Batch, Items, and Quantity.
 - **Batch:** Displays the totals based on the number of batches for new items, transfers, and replacements. This is the default option.

- **Items:** Displays the totals based on the number of requests (within batches) for new items, transfers, and replacements.
- **Quantity:** Displays the totals based on the quantity of parts or assets on each request for new items, transfers, and replacements.

Services/Inspections Options

- **Services and inspections days to project:** This gadget by default shows all inspections coming due in the next 30 days. You can change this default here.

Operator Search Options

- Operator Search default text (what shows in the search box on the gadget).
- Operator search to include the following fields:
 - Operator ID (default and cannot be turned off)
 - Employee ID
 - User ID
 - Operator Name
 - Employee Name
 - User Name
 - Operator License

Item Search Options

- Item Search default text (what shows in the search box on the gadget).
- Item search to include the following fields:
 - Asset ID (default and cannot be turned off)
 - Asset License #
 - Asset Number
 - Asset Serial Number (VIN)
 - Asset Manufacturer ID
 - Asset Model ID
 - Asset Description
 - Part ID (default and cannot be turned off)
 - Part Serial #

- Part Keyword
- Part Short Description



Please note/remember that if searching descriptions on large sets of data, your search WILL be slow. *Do not use these fields unless you have tested to understand the impact on your systems.*

- Report Settings
 - Assignment History Report: The report that is run when the Assignment History button is used. If customizing this report, please be aware that the following case sensitive parameters are used to generate this report: AssignToType or ID or AssignmentHistory. Click the **Restore Default** button to reset to the default report provided with the module.
 - Item History Report: The report that is run when the Item History button is used. Click the **Restore Default** button to reset to the default report provided with the module.
 - Template Validation Report: The report that is run when the Template Validation button is used. Click the **Restore Default** button to reset to the default report provided with the module.

Assignment Request Portal Settings

The Assignment Request Portal has a separate settings section on its tab through the Edit icon, which allows you to change items specific to this section:

The settings available are:

- **Portal-wide Options:** Date/Time Values in 24 hour or 12 hour format.
- **Assignment Request History Options:** Maximum history rows to display. This gadget by default shows 500 maximum history rows. You can change this default here.
- Request Catalog Options
 - **Display Quantity on Hand:** Check this checkbox to display quantity on hand on the Review Item pop-in.
 - **Display Unit Price:** Check this checkbox to display quantity on hand on the Review Item pop-in.
- **Item Request Header Options:** Enter custom header text or subtext.
- **Item Request Step 1 Options:** Enter custom tab code, tab text, tab subtext, and header or instruction text.

- **Use Asset Chooser instead of Choicelist:** Check/uncheck to use Asset Chooser instead of choice-list (default is checked to use Asset Chooser).
- **Allow user to request for additional entities:** This setting shows the option of **For Something Else (Specify)** on the request form in step 1. This list is not narrowed down by location rights as this request is for something else other than your user's normal options. Options available are Assets, Departments, Locations, and Operators.
- **Item Request Step 2 Options:** Enter custom tab code, tab text, tab subtext, and header text.
- **Item Request Step 3 Options:** Enter custom tab code, tab text, tab subtext, and header text.
 - Also set New Item header text, Transfer header text, and Replacement header text.
 - **Use the Request Catalog?:** Check or uncheck the this checkbox to make the request catalog available or not. Default is checked to show catalog. If this is unchecked, the **Request Catalog** button is replaced with the **Request** button, and opens to the regular request pop-in.
- **Item Request Step 4 Options:** Enter custom tab code, tab text, tab subtext and header text.

Configuring Allocation and Assignment Locations

The Allocation and Assignment Portal offers a setting on Locations options. This setting allows the location to do the following:

- To show up in the drop-down list for the portal, as a location that can assign items
- Prevents assignment of a part from a location that has not been setup to support assigning parts.

You can see and change this setting from the Locations – Primary Information screen, Functions tab:

The screenshot shows the 'Functions' section of the 'Allocation and Assignment Module Basic Settings' interface. On the left, a sidebar menu lists various settings, with 'Functions' currently selected. The main content area, titled 'Functions', contains a list of checkboxes for different location types. The checkbox for 'Allocation and assignment (quartermaster)' is highlighted with a red circle. Other checkboxes include 'Shop (regular)', 'Shop (mobile)', 'Shop (external)', 'Equipment site', 'Fueling site', 'Parts inventory', 'Pool (dispatch)', 'Station', 'Test', 'Shop scheduling active', and 'Operations'. To the right of the checkboxes is a 'Work management classification' field.

You can have **multiple locations** designated as an Allocation and Assignment location. The locations designated with this option should be the MAIN QUARTERMASTER LOCATIONS. For example: your headquarters office that contains all of the stock that you will be issuing or your warehouse of items you wish to assign to operators.

If a location is not configured with this option you will:

- Not see it on the Allocation and Assignment Portal pages
- Not be able to assign parts which are set up at this location.

You can assign items to a location that is not an allocation and assignment location.

Example: Using Location HQ (checkbox checked for an Allocation and Assignment location) and Location ST (checkbox not checked for an Allocation and Assignment location):

- An operator can request an item from Location HQ, and ask for it for Location ST.
Location ST needs medical supplies sent from HQ.
- When a quartermaster logs into the portal, they will see the request, and be able to assign from Location HQ to Location ST.

If Location HQ was not set as an Allocation and Assignment location, the quartermaster would not be able to assign stock from its location to any other location, person, or asset.

Locations Settings for Reporting

Your allocation and assignment locations (see above) may also be set up as parts Inventory locations. The combination of these settings will allow parts stock at locations if you choose to manage inventory.

The Allocation and Assignment Portal has two inventory reports that are available for showing inventory count and inventory value. One report pulls the quantity of the parts assigned to the chosen location. The other report pulls the quantity of assets that use this location.



There are multiple locations available for an asset. To use the allocation and assignment reporting, you must set up your assets' **Station** (headquarters) location the same as your stocked parts for the Allocation and Assignment locations.

To set a station for an asset, go to the Asset Primary Information screen, Locations tab:

The screenshot shows the 'Locations' tab in the Asset Primary Information screen. The left sidebar contains a list of tabs: Basic Info, Meter Info, Classes, Locations (highlighted), Assignments, Accounts, Status, Capital, and Motor Pool. The main content area is titled 'Locations' and contains a form with various fields. The 'Station' field is highlighted with a red oval. The form includes fields for 'Location type' (Assigned PM, Assigned repair, Assigned mobile, Station, Stored, Current, Availability, Last fuel, Access rights) and 'Preferred PM shift' (Preferred PM shift, Work assignment profile, Vehicle location, Building location, Other location data, Last fuel date). The 'Station' field is the first field in the 'Location type' section.

Employee Supported Locations

Set up supported locations on the Employee Primary Information screen, Assignment Info tab.

The screenshot shows the 'Assignment Info' tab for an employee. On the left is a sidebar with navigation links: Personal Info, Assignment Info (highlighted), Authority Info, Employment Info, Classifications, Rates, Skills, Scheduling, and Files. The main area contains several input fields: Work phone, Mail drop, Email address, Assigned shop location ID, Station location ID, Company ID, Building location, Account ID, and Shift. A red box highlights the 'Supported locations' section, which includes a checkbox labeled 'Supports all locations' and a table with columns: Row #, Delete, Location ID, and Location name. The table is currently empty.

You can choose the **Supports all locations** checkbox if you are an administrator. Otherwise, set specific locations. After changing this setting, you may need to log off and log back on.



If you do not set Supported Locations, you will receive the error **Logged in user has an associated Employee ID with no Supported Locations. This is required in order to access this area. Please contact your system administrator.**

Using Asset/Component and Part Categories

Though it is not a requirement to use asset/component (asset category) and part (product) categories to use this portal, it is highly recommended.

The Assignment Request portal and reporting rely on the setup of categories to function properly. Asset and product categories are how one can create a catalog of items an operator can request.

Without using categories, you would not be able to do the following:

- Allow users to request a specific item through the Request area – they would only be able to see or request by typing a description.
- See detailed Inventory reporting by type of item.

Ways to View or Edit These Categories

Assets and Components: Go to the Asset Primary Information screen or the Components – Primary Information screen, Classes tab

The screenshot shows the 'Classes' tab in the Asset Primary Information screen. The left sidebar contains a list of tabs: Basic Info, Meter Info, **Classes**, Locations, Assignments, Accounts, Status, Capital, Motor Pool, Authorization, Comments, and Class PM. The main content area is titled 'Classes' and contains the following fields:

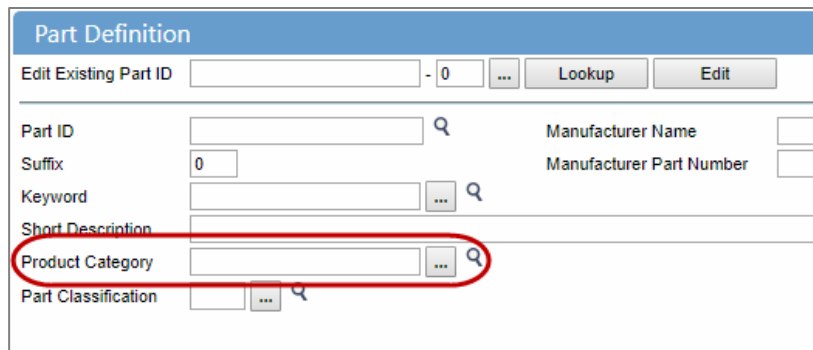
- Equipment class for: Maintenance, PM program, Standards, Rental rates, Resources (each with a search icon and a text input field)
- SLA equipment category (two text input fields)
- Benchmarking class type (text input field)
- Asset category ID** (two text input fields, circled in red)
- System grouping ID (two text input fields)
- Emergency class ID (two text input fields)

Parts: Go to the Parts – Primary Information screen, Basic Info tab:

The screenshot shows the 'Basic Info' tab in the Parts – Primary Information screen. The left sidebar contains a list of tabs: **Basic Info**, Stock Mgmt, More Info, Purchasing Info, Purchasing Notes, Replenishment, Repair, Comments, Stock Status, and Other Status. The main content area is titled 'Basic Info' and contains the following fields:

- Keyword (two text input fields)
- Short description (text input field)
- Product category ID** (two text input fields, circled in red)
- Part classification ID (two text input fields)
- VMRS code (text input field)
- Date and time added (date and time input fields)
- Associated file (Path and file name, Description, and file upload area)
- Kit type (dropdown menu with options: NONE, ASSEMBLE, UNASSEMBLE)
- Checkboxes: Tire, Core, Controlled subassembly, Item is fabricated

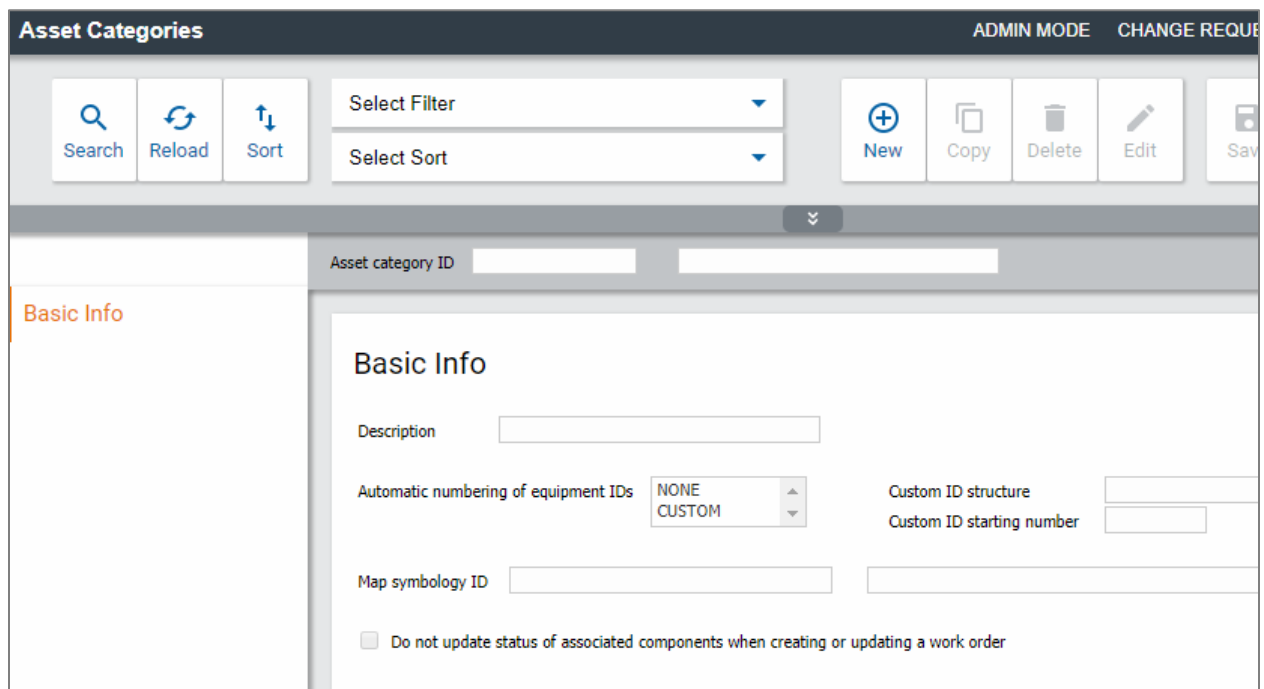
OR: Go to the Part Definition Pop-in in Shop Activity Storekeeper Portal:



The image shows a 'Part Definition' form. At the top, there is a header 'Part Definition' in a blue bar. Below it, there is a section for 'Edit Existing Part ID' with a text input field, a dropdown menu showing '- 0', and buttons for 'Lookup' and 'Edit'. The main form area contains several fields: 'Part ID' (text input), 'Suffix' (text input with '0'), 'Keyword' (text input), 'Short Description' (text input), 'Product Category' (text input with a dropdown arrow and a magnifying glass icon, highlighted with a red oval), and 'Part Classification' (text input with a dropdown arrow and a magnifying glass icon). There are also fields for 'Manufacturer Name' and 'Manufacturer Part Number' on the right side.

Ways to Create or Edit the Category List

Assets and Components: Asset Categories screen, Basic Info tab:



The image shows the 'Asset Categories' screen. At the top, there is a header 'Asset Categories' in a dark blue bar. To the right of the header, there are links for 'ADMIN MODE' and 'CHANGE REQUIREMENTS'. Below the header, there is a toolbar with buttons for 'Search', 'Reload', 'Sort', 'Select Filter', 'Select Sort', 'New', 'Copy', 'Delete', 'Edit', and 'Save'. The main content area is divided into two sections: 'Basic Info' (highlighted in orange) and 'Advanced Info'. The 'Basic Info' section contains the following fields: 'Asset category ID' (text input), 'Description' (text input), 'Automatic numbering of equipment IDs' (dropdown menu with 'NONE' and 'CUSTOM' options), 'Custom ID structure' (text input), 'Custom ID starting number' (text input), 'Map symbology ID' (text input), and a checkbox labeled 'Do not update status of associated components when creating or updating a work order'.

Parts: Product Categories screen, Basic Info tab:

The screenshot shows the 'Product Categories' interface. At the top, there's a header bar with 'Product Categories' on the left and 'ADMIN MODE', 'CHANGE REQUEST', and 'HELP' on the right. Below the header is a toolbar with icons for Search, Reload, Sort, and a dropdown for 'Select Filter'. To the right of the toolbar are buttons for New, Copy, Delete, Edit, Save, and Cancel. The main content area is titled 'Basic Info' and contains several input fields and checkboxes. The 'Product category ID' field is at the top. Below it are fields for 'Description', 'Disposal stock review period (months)', 'Part ID prefix', 'Number of digits for sequential number', and 'Last number used'. There are also checkboxes for 'Approved for automatic ordering' and 'Enable automatic part numbering'. At the bottom, there are three rows of fields for 'Employee responsible for ordering', 'Employee responsible for expediting', and 'Employee responsible for inventory control'.

Using a Part vs. an Asset

Whether to assign items as assets or parts (or both) depends on your organization's needs and plans for valuation and tracking of items.

Items that should be Assets (or Components):

- Items that require preventative maintenance schedules or inspections
 - Need to track inspections on a serialized firearm and show accountability for these inspections
- Items of high value where tracking service or work orders are required
 - Need to keep track of an overhead hoist at a shop location, and schedule regular service and work orders for fixing and regular maintenance
- Items that you require to track depreciation
 - Need to keep track of depreciation of above and in-ground vehicle lifts at a shop location

❗ Items for which you do not need to track maintenance, and that will be managed as inventory can be parts.

- ✔ Assets (or Components) can have a department, and parts cannot. If you need to track items specifically by department, you can use this feature for internal departments. Inventory reports can filter based on department, though this does not consider part items.

Using Departments

For assets you can assign a Department ID, as well as a Department ID to notify for PM (Preventive Maintenance). This is done under Equipment Units > Asset Primary Information.

Use of the Departments here will affect the Allocation and Assignment Portal when using the *Inspections Due* features. You can also choose to filter the Inspections report based on Department.

Example of use: Set up a Department ID for any asset purchased under an acquired **Grant #**, and run inventory report to see all items for that grant.

Items that should be Parts

- Will be purchased often or potentially replaced frequently under the same part number, even if different serial numbers
 - We purchased a bulk box of 12 flashlights with Part Number FL1234, each with a separate serialized number this year for \$270. Next year, we will buy another 12 FL1234 flashlights, and the price may change. This type of tracking can be done under Parts.
- Low cost or low value items, and disposable items
 - Items, such as shop items (e.g., rubber gloves, paper towels) or uniforms (e.g., shirts, pants) that you want to direct issue to a location or person.



The system can track parts with serial numbers. Items with serial numbers can be managed as either serialized parts, assets, or components. If tracking maintenance on the item is important, consider using assets/components; otherwise use serialized parts.

3. Allocation and Assignment

Allocation and Assignment Portal Main Page Overview

The main section of this portal is the Allocation and Assignment area. This is the main *Quartermaster* portal.

Allocation and Assignment Portal

Current Location: ZSLOC-001 - ZS LOCATION Layout Refresh 5 minutes

View Requests Assign New Item

Recent Assignments

Current Filter: UNFILTERED Modify Filters

No	Item	Type	Qty	Assign to ID	Ass
1081	GLOCK-17-0	PART	1.00	SRV01	OPERJ
1075	REMINGTON-M700-TACT-CH-0	PART	1.00	ZSEQP-002	ASSET
1069	TSHIRT-0	PART	1.00	ZSOP	OPERJ
1068	TSHIRT-0	PART	1.00	ZSOP	OPERJ
1067	ZSEQP-002	ASSET	1.00	ZSEQP-001	ASSET
1066	APX8000-0	PART	5.00	ZSOP	OPERJ

Showing 254 records

Web Screens

- Allocation and Assignment
- Assignment Request
- Assets - Primary Information
- Components - Primary Information
- Parts - Primary Information
- Parts - Location Information

Request Summary

- 83 New Item Requests
- 7 Transfer Requests
- 34 Replacement Requests
- 124 Total Requests

New Item Transfer Replacement

Item Search

Asset ID - Part ID - Serial Number - Description Go

Operator Search

Operator ID or Name - Employee ID or Name - User ID Go

Inspection Summary

Services / Inspections Due: 0

Allocation and Assignment is a gadget-based portal, composed of gadgets that are customizable. Each user of the system has their own configurable layout and set of gadgets, and all items on the portal can be shown or hidden/removed per user. If you are familiar with the Shop Activity Work Management Portal, this portal is similar in structure, though contains some different gadgets that are specific to this portal.

Customizing the Portal

By default, the layout of this portal will contain the Recent Assignments Gadget in the left column, and Summary, Screen and Search gadgets in the right column. You can also add query, metrics, or URL gadgets.



To learn more about customizing your gadget layout and standard gadgets, refer to the *General Application Information* guide.

Available Options and Gadgets

Standard Gadgets: These are not specific to this portal, they are included currently with this and other Gadget-based portals, and are highly customizable.

- Ad Hoc Query
- Metrics
- URL

Allocation and Assignment Portal Gadgets: These gadgets are available only in this portal.



Note: Gadgets will only display for screens that you have access to (per the screen rights).

- History Search: Use the History Search gadget to search for assets, parts, etc., and open the Assignment History page for that item.
- Inspection Summary: Summary of upcoming inspections and services due for the selected allocation location based on # of days projected (from settings), with link to detailed list.
- Item Search: Search for specific assets and parts to view assignment history and item details.
- Operator Search: Search for operators by ID, name, employee ID, or user ID to view assignment history and operator details.
- Recent Assignments: Summary of assignment activity with customizable filters.
- Request Summary: This gadget handles direct links to the Recent Requests page to view the New Items, Transfers, or Replacements tabs.
- Web Screens: Convenient list of specific web screens that are related to setup and assignment activity.
 - Allocation and Assignment
 - Assignment Request
 - Assets - Primary Information
 - Components - Primary Information
 - Parts - Primary Information
 - Parts - Location Information
 - Parts Issues and Returns
 - Parts - Direct Issues
 - Parts - Transfers

- Parts - Adjustments
- Serialized Parts (If authorized for the currently logged-in user, it can be used to view/manage/create serialized parts, to help with NFI issues, on demand assignments, etc.)

View Requests Button

This button opens the Recent Requests page. Tabs on this page include **New Items**, **Transfers**, **Replacements**, and **Individual Requests**.

General Request Information

The **Recent Requests** page allows you to filter requests to view, edit, cancel, or respond. You can define custom filters to specify the assignment requests you want to see, or you can search within the visible results.

Requests with a completed status will automatically display to allow for faster loading of information for the **New Items**, **Transfer**, and **Replacements** tabs. The **Individual Requests** tab only loads the list when the tab is selected.



Note: **New Item**, **Transfer**, and **Replacement** tabs will only show batches that have one or more pending assignment requests. The **Individual Requests** tab shows all statuses, and can be used to filter for all past items since the other tabs only show items still in progress.

Recent Requests						
New Items (83)		Transfers (7)	Replacements (34)	Individual Requests (180)		
Action		Batch ID	Requests	Request Reason	Request For Type	Requested For
		161	1	NEW ITEM	OPERATOR	ZSOP - ZS OPERATOR
		160	2	NEW ITEM	OPERATOR	ZSOP - ZS OPERATOR
		159	1	NEW ITEM	OPERATOR	ZSOP - ZS OPERATOR
		156	1	NEW ITEM	OPERATOR	ZSOP - ZS OPERATOR
		145	2	NEW ITEM	OPERATOR	ZSOP - ZS OPERATOR
		142	2	NEW ITEM	OPERATOR	ZSOP - ZS OPERATOR
		141	1	NEW ITEM	OPERATOR	ZSOP - ZS OPERATOR
		140	1	NEW ITEM	OPERATOR	ZSOP - ZS OPERATOR
		139	2	NEW ITEM	OPERATOR	ZSOP - ZS OPERATOR
		138	2	NEW ITEM	OPERATOR	ZSOP - ZS OPERATOR
		137	1	NEW ITEM	OPERATOR	ZSOP - ZS OPERATOR
		136	2	NEW ITEM	OPERATOR	ZSOP - ZS OPERATOR
		124	1	NEW ITEM	OPERATOR	ZSOP - ZS OPERATOR
		115	2	NEW ITEM	OPERATOR	ZSOP - ZS OPERATOR

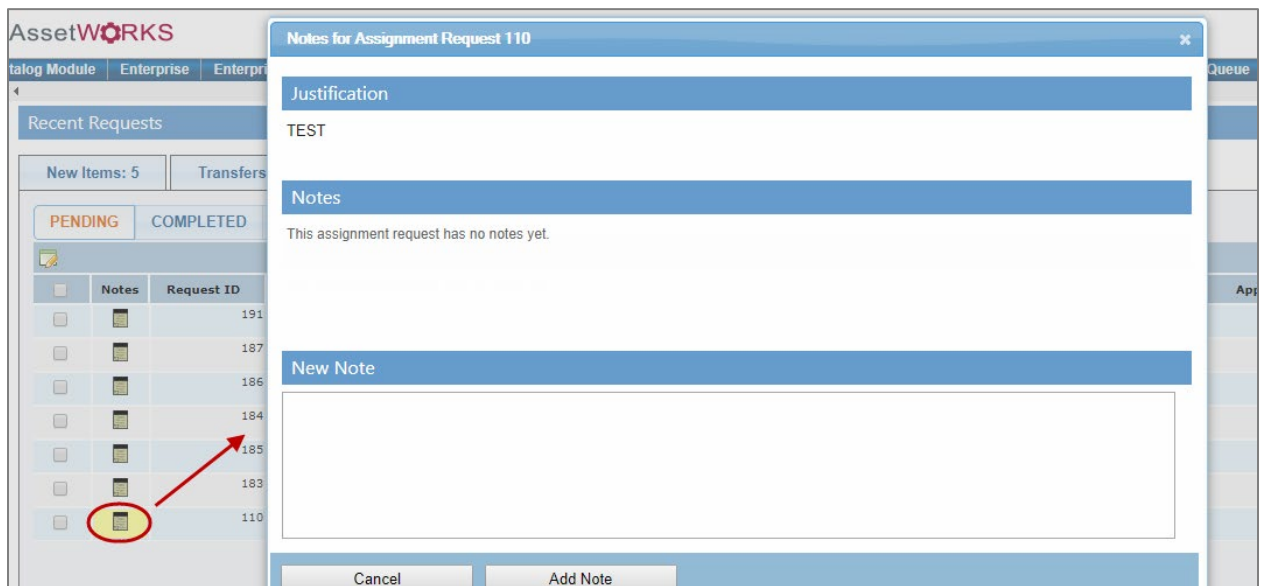
All items submitted under the same request will have the same batch ID. For items under the New Items, Transfers, and Replacements tabs, click the + sign to see the items with that batch ID.

If an item has a serial number, the serial number column will display with the serial number and description for that item, otherwise, this field is hidden if not needed.

Recent Requests List

The following actions are available on the Recent Requests list:

- **Action:** The edit pencil icon allows you to begin the request approval or rejection process to action that item. See the [Actioning a Request](#) section below for more information.
- **Notes:** The Notes  icon opens the Notes for Assignment Request pop-in, which shows you the previous notes for the assignment request and allows you to add a new note. When highlighted, a justification or a previous note exists for the request. The Notes pop-in displays the Justification section if there is a justification entered for the request.



- **Requested For** hyperlink: this takes you to the [Assign-to Detail](#) page, which shows you the Operator, Department, Asset, or Location details for current or previously assigned items.
 - **Assignment No** hyperlink: Links the **ORIGINAL** assignment to the item with which it was later actioned.
-  The **Assignment No** hyperlink only shows if an item was previously requested and assigned and the user has re-requested the item due to it being Lost, Returned, Disposed, Broken, or Stolen.



For Example:

- You receive request # 79, that an operator has broken their item. This item was assigned to the operator 1 year ago, and has the assignment number of #29 in your Assignments table.
- You approve that item and assign a NEW item, which is assigned as Assignment #235.
- The linked assignment number, will be #29, since it relates to the original assignment.
- This linking item ONLY appears after the request is responded to (i.e., without initial interaction to Approve/Deny a request there will never be an assignment number).
- A New Item request will never have an Assignment No link, *as it never had an original assignment to link back to*. Only lost, returned, disposed, broken, and stolen requests will link back to their original assignment number.

Individual Requests Tab

The Individual Requests tab also has filter buttons to filters by pending, completed, or canceled requests.

Recent Requests

New Items (83)

Transfers (7)

Replacements (34)

Individual Requests (180)

PENDING

COMPLETED

CANCELED

	Notes	Request ID	Batch ID	Request for Type	Request Reason	Item	Quantity
☐		157		OPERATOR	NEW ITEM	RISE-L-0	
☐		105		OPERATOR	NEW ITEM	AEX10-0	
☐		106		OPERATOR	NEW ITEM	GLOCK-17-T-FX-0	
☐		107		OPERATOR	NEW ITEM	CHMECHG-L-0	
☐		108		OPERATOR	NEW ITEM	RUGER-SR45-0	
☐		111		OPERATOR	NEW ITEM	S&W-M&P-15-22-HV-MOON-0	
☐		112		OPERATOR	NEW ITEM	APX8000-0	
☐		113		OPERATOR	NEW ITEM	S&W-M&P-15-22-HV-MOON-0	

Showing 99 of 180 records

Requests Filters

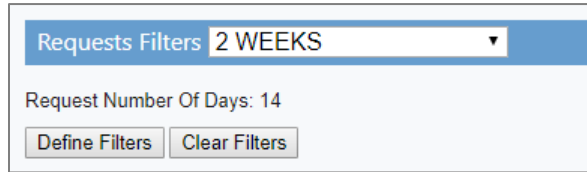
No filter defined.

Define Filters

Clear Filters

Requests Filtering

Filters that you define are saved to a drop-down on the main filter page for easy switching. These are customizable, and are saved per user (not shared between users). When you choose a filter from the list, its criteria shows above the **Define Filters** and **Clear Filters** buttons.



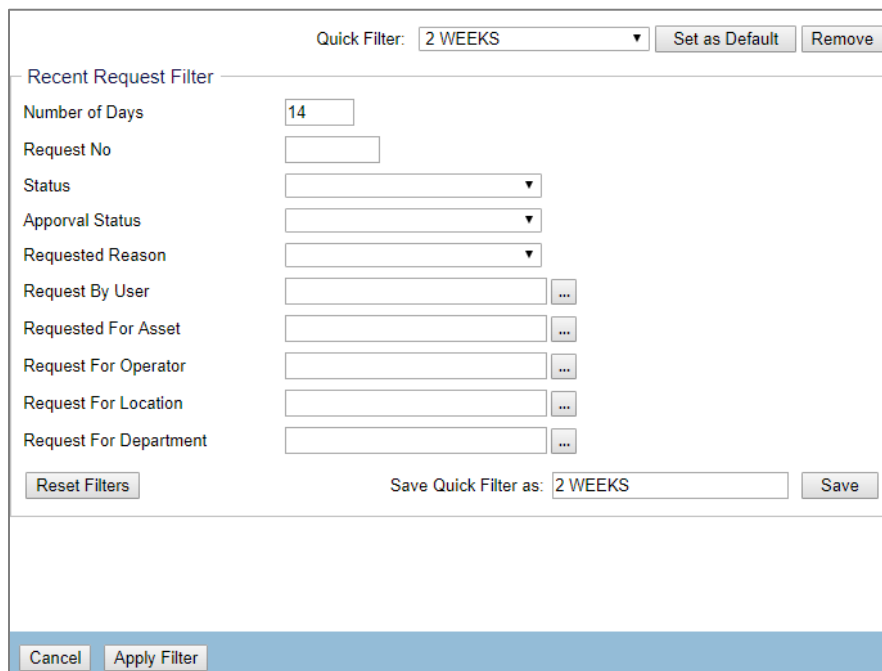
Requests Filters **2 WEEKS** ▼

Request Number Of Days: 14

Define Filters **Clear Filters**

To define a new filter:

You can define a new filter for requests. You can define a filter on the Recent Request Filter page. This page allows you to define criteria and save custom filters.



Quick Filter: **2 WEEKS** ▼ **Set as Default** **Remove**

Recent Request Filter

Number of Days

Request No

Status

Approval Status

Requested Reason

Request By User

Requested For Asset

Request For Operator

Request For Location

Request For Department

Reset Filters Save Quick Filter as: **Save**

Cancel **Apply Filter**

1. Click **Define Filter**.
2. Enter your information into the Recent Request Filter page.
3. Type a name for your new filter in the **Save Quick Filter as:** field.
4. Click **Save**.

Use the **Remove Filter** button to remove a saved filter after you choose an existing filter from the list.

The **Clear Filters** button clears your current filter criteria for that view. It does not delete that filter.

Current Location

The Current Location field allows you to set the current location for the Allocation and Assignment portal to use for filters, assignments, etc. This is a drop-down menu that filters to locations supported by the current user logged into the system, and defaults to their main location. As you start to type an entry into the locations field, the list in the drop-down filters as you type to match your selection.

The screenshot shows the 'Allocation and Assignment Portal' header. Below it, the 'Current Location' dropdown menu is open, displaying 'ZSLOC-001 - ZS LOCATION'. To the right of the dropdown is a 'Layout' button. Below the dropdown are two buttons: 'View Requests' and 'Assign New Item'.

Under current location, you can choose a high-level or base location. The hierarchy is shown below.

The screenshot shows the 'Allocation and Assignment Portal' header. Below it, the 'Current Location' dropdown menu is open, displaying 'XANDER-LOC - ALEX LOCATION'. A list of locations is shown below the dropdown, including 'AB-LOC-000-AB - FUTURECORP HQ', 'ABQ AV-ABQ AV', 'ABQ AV', '16-34-BUILDING 1634', 'ABQ AV > 16-34', 'BAY-BAY', 'ABQ COM-ABQ COM', 'ABQ COM', and '975 BUILDING 975'. To the right of the dropdown is a 'Layout' button. Below the dropdown are two buttons: 'View Requests' and 'Assign New Item'. Below the buttons is a 'Recent Assignments' section with a 'Current Filter' dropdown and a 'Modify Filters' button. Below the filter is a table with columns: 'No', 'Item', 'Type', 'Qty', 'Assign To ID', and 'Assign To Type'.

Recent Assignments and Assigning New Items

The main page of the portal has a Recent Assignments gadget which shows a summary of your assignments. There is also an **Assign New Item** button that allows new assignment records to be created from a blank template, the [Item Assignment](#) page.

The screenshot shows the 'Allocation and Assignment Portal' header. Below it, the 'Current Location' dropdown menu is open, displaying 'JSBAD2 - JSBAD2'. To the right of the dropdown is a 'Layout' button. Below the dropdown are two buttons: 'View Requests' and 'Assign New Item'. The 'Assign New Item' button is highlighted with a red circle. Below the buttons is a 'Recent Assignments' section with a 'Current Filter' dropdown and a 'Modify Filters' button. Below the filter is a table with columns: 'No', 'Item', 'Type', 'Qty', 'Assign To ID', and 'Assign To Type'.

Recent Assignments Gadget

This list is an activity summary for your Quartermaster items – any assignment change will show here, with summary information as well as links to the full Assignment Detail page, Item Detail page or Assign-to Detail page. Assignments displayed in this gadget are filtered on the location selected in the Current Location drop-down menu at the top of the page.

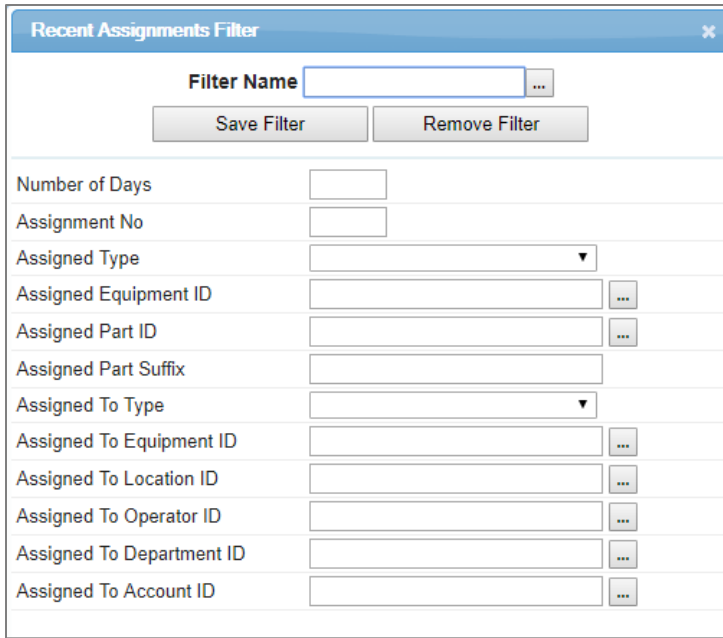
Gadget Layout

Recent Assignments							
Current Filter:				Modify Filters			
No	Item	Type	Qty	Assign To ID	Assign To Type	Status	Expiration Date
435	TH-100003-0	PART	1.00	GF	OPERATOR	ABCDEFGHJ...	
432	TH-FLT-EQUIP-1000002	ASSET	1.00	TH-LINEAR	DEPARTMENT	ABCDEFGHJ...	
431	TH-FLT-EQUIP-1000001	ASSET	1.00	TH-TESTING	DEPARTMENT	ABCDEFGHJ...	
424	1000-0	PART	1.00	GF	OPERATOR	ABCDEFGHJ...	
417	21871-0	PART	1.00	SRMC-ADMIN	DEPARTMENT	DISPOSED	
413	CNPART031-0	PART	1.00	JBOPER	OPERATOR	ASSIGNED	
412	JBEQ1	ASSET	1.00	SJW	OPERATOR	ASSIGNED	

- **Current Filter:** Apply a saved filter.
- **Modify Filters:** This section allows you to create and modify a filter. You can choose criteria (e.g., only BROKEN items) and save the filter by naming it and choosing **Save Filter**. You can also remove saved filters from this menu by selecting the filter and clicking the **Remove Filter** button.



Saved filters are per user (cannot be shared with other users). Saving a filter with the same name as a different filter will overwrite the old filter without prompting.



The image shows a 'Recent Assignments Filter' dialog box. At the top, there is a 'Filter Name' text input field followed by a three-dot menu icon. Below this are two buttons: 'Save Filter' and 'Remove Filter'. The main body of the dialog contains a list of filterable fields, each with a text input or a dropdown menu and a three-dot menu icon to its right. The fields are: 'Number of Days' (text input), 'Assignment No' (text input), 'Assigned Type' (dropdown), 'Assigned Equipment ID' (text input), 'Assigned Part ID' (text input), 'Assigned Part Suffix' (text input), 'Assigned To Type' (dropdown), 'Assigned To Equipment ID' (text input), 'Assigned To Location ID' (text input), 'Assigned To Operator ID' (text input), 'Assigned To Department ID' (text input), and 'Assigned To Account ID' (text input).

- **Number of Days:** You can quick change the shown number of days here by typing a number in the box and using the **Refresh** button. If you leave the portal and later return, it will always default to the number set in settings, but you can use this for on-the-fly filtering by day.
- **Search all Columns:** This is a text-search of the shown columns. It will only search through the details that are currently filtered.
- **Assignment Table Columns**
 - **No:** Assignment Number. This shows the assignment number record. It is a hyperlink that pulls up a pop-in of that assignment's details (discussed below).
 - **Item:** Asset Number / Part Number. This shows the ID of the assigned item (discussed below).
 - **Type:** Type of assigned item. Choices are ASSET or PART.
 - **Qty:** Quantity assigned.
 - **Assigned to ID:** ID of the Location, Department, Operator, or Asset the item was assigned to. Hyperlink to detail page for that Location, Department, Operator or Asset (discussed below).
 - **Assigned to Type:** Type of thing the item was assigned to. Choices are LOCATION, DEPARTMENT, OPERATOR, or ASSET (another item).
 - **Status:** Assignment status. Choices are ASSIGNED, RETURNED, DISPOSED, BROKEN, LOST, or STOLEN.
 - **Expiration Date:** The expected expiration date of the assigned item (if any).

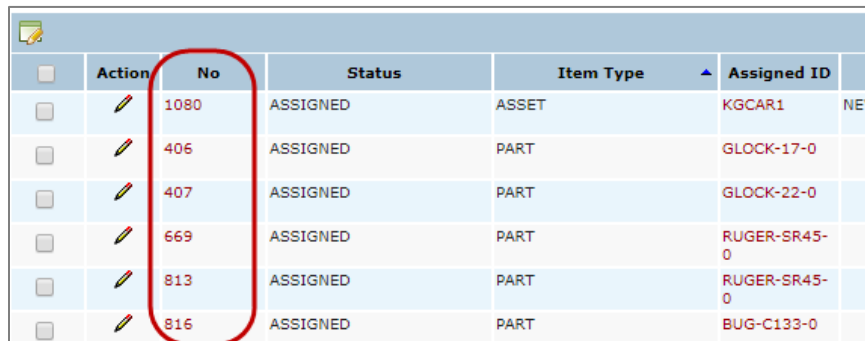
- **Start Date:** Date the assignment started.
- **End Date:** Date the assignment was terminated.

Reminders about the Recent Assignments list: The Recent Assignments list shows a summary of ASSIGNMENTS, actions that quartermasters have taken in the system. This list will not show REQUESTS – that is a separate area (covered later).

This list shows a history of quartermaster actions for assigning items. For example, if an employee sends in a request for a broken item, you will not see “Broken” in this list until you APPROVE that request.

Assignment Detail Pop-in/Edit Assignment Detail Page

The Assignment Detail pop-in provides details of the assignment that pop-in when you click the **No** column hyperlink in the Recent Assignments list.



	Action	No	Status	Item Type	Assigned ID	
☐		1080	ASSIGNED	ASSET	KGCAR1	NEW
☐		406	ASSIGNED	PART	GLOCK-17-0	
☐		407	ASSIGNED	PART	GLOCK-22-0	
☐		669	ASSIGNED	PART	RUGER-SR45-0	
☐		813	ASSIGNED	PART	RUGER-SR45-0	
☐		816	ASSIGNED	PART	BUG-C133-0	

From this summary/details page, click the edit pencil icon to go to the [Assignment Detail Edit](#) page to update the assignment status and dates or add notes.

Assignment Detail

Assignment Detail

Assignment No	1080 	Status	ASSIGNED
Assignment Started	07/19/2017 11:26 AM	Assignment Ended	
Expiration Date		Expected Return	
Condition Rating			

Assignee

Assign to Type	OPERATOR
Operator ID	ZSOP - ZS OPERATOR
Account ID	000-0001-00 - ACCOUNT

Assigned Item

Item Type	ASSET
Assigned Asset ID	KGCAR1 - 1753 NEW FLYER C40LF 2001 NEW FLYER COMPRESSED NATURAL GAS 40
Issue Location	RGLOC1 - RG LOCATION1
Quantity	1.00

Notes

Date	User	Note
------	------	------

- **Assignment Detail** section: Shows number, dates, and status. Click the **Edit** icon to go to the [Assignment Detail Edit](#) page.
- **Assigned Item** section: Shows item type, assigned ID, issuing location (only if the item is a part), and quantity. Click the **Assigned Asset ID** hyperlink to go to the [Assigned Item Detail](#) page.
- **Assigned to** section: Shows if the item is assigned to an Operator, Location, Department, or Asset, and which one. The ID is a hyperlink to the [Asset Detail](#) page.
- **Notes** section: Shows the date/time, user and entered note item. If you have multiple people leaving notes on an item, you will see which user entered notes or completed an action here.

Assignment Detail Edit Page

The Assignment Detail Edit page shows the same information as above, but allows editing of certain information.

Assignment Detail		
Assignment No	1081	Status ASSIGNED ... ASSIGNED
Assignment Started	08/01/2017 10:05 AM	Assignment Ended ___/___/___:___
Expiration Date	___/___/___:___	Expected Return ___/___/___:___
Condition Rating	5 ...	EXCELLENT
Assignee		
Assign to Type	OPERATOR	
Operator ID	SRV01 - SARAH VICKERS	
Assigned Item		
Item Type	PART	
Assigned Part ID	GLOCK-17-0 - HANDGUN: DESIGNED FOR PROFESSIONALS. THE GLOCK 17, IN 9X19, IS THE MOST WIDELY USED LAW ENFORCEMENT PISTOL WORLDWIDE.	
Quantity	1.00	
New note		
Notes		
Date	User	Note
08/01/2017 10:08 AM	ZS	ADDED NOTES FOR ASSIGNMENT OF EQUIPMENT TO OFFICER.
Back Save		Assignment History Report

You can change the status of an assignment depending on the current status. Once RETURNED an assignment's status cannot be changed again. A returned status requires a new assignment record; therefore, the original one is closed and cannot be edited.

When you change the status of an item, a note is automatically added to the assignment to record the status change. You can also add a new note on this page.

If configured in settings, the **Assignment History Report** link will run the Assignment History report.

The system requires entry of the *Assignment ended* date when you change the status from ASSIGNED to another status. Backdating and postdating the *Assignment ended* date is

allowed. Clicking the **Assigned Part ID/Asset ID** link takes you to the [Assigned Item Detail](#) page as shown in the next section.

Assigned Item Detail Page

The Assigned Item Detail page shows Assigned Item Detail and Assignment History.

- Click the **Edit** pencil to open the [Assignment Detail Edit](#) page.
- Click the **Item ID** link to open the Enterprise Portal screen to the item's record.
- Click the **Assigned-to ID** link to go to the [Asset Detail](#) page as discussed in the next section.
- Click the **Assignment Number** link to go to the [Assignment Detail](#) pop-in.
- Click the note icon in the **Notes** column to open the Notes for that item.

Assigned Item Detail

Item TypePARTConsumableNo

Item IDTSHIRT-0DescriptionSAFETY; TSHIRT

ManufacturerModel

Serial NumberM-005

Item History

ASSIGNED

LOANED

FINISHED

CLOSED

ALL

Bulk Editing

On this page, you can also edit items in bulk instead of one at a time.

To edit bulk items:

1. Select the items to edit:
 - Check the boxes, in the left column, of the items needed for editing.

- To select all items in the list, click the checkbox in the top-left corner of the table.
2. Once you have selected items, click the bulk edit icon.

ASSIGNED			
LOANED			
FINISH			
☐	Action	No	Status
☐		462	ASSIGNED

3. Select either **Edit** or **Transfer**.

ASSIGNED			
LOANED			
FINISH			
	Action	No	Status
Edit		462	ASSIGNED
Transfer		645	ASSIGNED
Clear		376	ASSIGNED

Note: The **Transfer** option does not display if you are not in the user group set up to work with direct transfers with the **Allow users in this group to action Direct Transfers** option on the settings page.

4. The Edit Selected or Transfer Selected pop-ins display.

Edit Selected

Status

...

Notes

Expected Return

Expiration Date

Assignment Ended

Condition Rating

...

Cancel

Save

Transfer Selected

Transfer From

Assignee: ZSOP ZS OPERATOR

Status: [Yellow field] ...

Assignment Ended: 07/28/2017 09:19 AM [Calendar icon]

Condition Rating: [Field] ...

Note: [Text area]

Transfer To

Assignee Type: [Dropdown: ASSET, DEPARTMENT, LOCATION, OPERATOR]

Assignee: [Yellow field] ...

Status: [Yellow field] ...

Assignment Started: 07/28/2017 09:19 AM [Calendar icon]

Expiration: [Field] [Calendar icon]

Expected Return: [Field] [Calendar icon]

Account: [Field] ...

Condition Rating: [Field] ...

Note: [Text area]

Cancel Transfer

To Edit:

- i. Enter the edit information. This includes Status, Notes, Expected Return, Expiration Date, Assignment Ended, and Condition Rating fields.
- ii. Click **Save**.

To Transfer:

- i. Enter the Transfer From information. This includes the Status, Assignment Ended, Condition Rating, and Note fields.
- ii. Enter the Transfer To information. This includes Assignee Type, Assignee, Status, Assignment Started, Expiration, Expected Return, Account, Condition Rating, and Note fields.
- iii. Click **Transfer**.

Asset Detail Page

This page varies depending on whether you are viewing an operator versus an asset, location, or department. In all cases, the page header shows some basic information about the operator, asset, location, or department. For assets, locations, and departments this page also shows a history of assignments.

Assign New Item: This button is the same as the one on the front page of the portal. It takes you to the [Item Assignment](#) page (discussed in the next section). However, using this button from an Asset Detail page will automatically populate the Assign to section for you.

The Asset Detail page (or Operator Detail page) also allows the following:

- **Operator Detail:** You can view assignment history for that operator using the ASSIGNED, LOANED, FINISHED, CLOSED, and ALL tabs.
- **Operator ID:** This hyperlink opens the Enterprise Portal screen to that record.
- **Bulk Editing:** Use the bulk editing button to edit more than one item at a time. For more information on bulk editing, refer to the [Bulk Editing](#) section.
- **No column:** Click the assignment number in the No column to open the [Assignment Detail](#) pop-in.
- **Assignment History Report:** This hyperlink runs the Assignment History Report as set in Module Settings, Report Settings.
- **Template Validation Report:** This hyperlink runs the Template Validation report.

Operator Detail																											
Operator ID	SRV01		Operator Name	SARAH VICKERS																							
Employee ID	SRV		Assigned Location	1 - OPS																							
Work Phone			Department ID	SRV DEPT - SRV DEPT001																							
Job Title	TW TECH		Occupation	MERC																							
Operator License	SRV01SPOK																										
Assignment History																											
ASSIGNED LOANED FINISHED CLOSED ALL																											
<table border="1"> <thead> <tr> <th></th> <th>Action</th> <th>No</th> <th>Status</th> <th>Item Type</th> <th>Assigned ID</th> <th>Make</th> <th>Model</th> <th></th> </tr> </thead> <tbody> <tr> <td>☐</td> <td></td> <td>1081</td> <td>ASSIGNED</td> <td>PART</td> <td>GLOCK-17-0</td> <td></td> <td></td> <td>HANDGUN; DESIGNED FOR PROFI ENFORCEMENT PISTOL WORLDWI</td> </tr> </tbody> </table>											Action	No	Status	Item Type	Assigned ID	Make	Model		☐		1081	ASSIGNED	PART	GLOCK-17-0			HANDGUN; DESIGNED FOR PROFI ENFORCEMENT PISTOL WORLDWI
	Action	No	Status	Item Type	Assigned ID	Make	Model																				
☐		1081	ASSIGNED	PART	GLOCK-17-0			HANDGUN; DESIGNED FOR PROFI ENFORCEMENT PISTOL WORLDWI																			
Showing 1 record																											
Back		Assign New Item			Assignment History Report Template Validation Report																						

The edit icons allow you to change any current assignment or any item on the Asset Detail page that is still in assigned status with no end date. If items have been closed in the system, you will not be able to edit a closed assignment (you will do a re-issue if needed). For example, if you try to change the status on a returned item, you will receive the error of: **Cannot change status once set to RETURNED. - PR-ERR: 2121.**

Item Assignment Page

The **Assign New Item** button opens the Item Assignment page. This page is used any time you make an assignment, and at times (depending on how you access it, see above) certain criteria will be pre-filled for you. When you use the button on the portal front page, the form will be blank.

Item Assignment Details

The screenshot shows the 'Item Assignment' form with the following fields:

- Status:** A dropdown menu with a yellow highlight and a three-dot edit icon.
- Assignment Started:** A date and time field showing '07/31/2017 12:23 PM' with a calendar icon.
- Assignment Ended:** A date and time field with a calendar icon.
- Expiration Date:** A date field with a calendar icon.
- Expected Return:** A date and time field with a calendar icon.
- Condition Rating:** A text input field with a three-dot edit icon.
- Account ID:** A text input field with a three-dot edit icon.

The Assignment details section allows you to enter:

- **Status:** Set the status of the item. Options include statuses like ASSIGNED, BORROWED, DISPOSED, IN REPAIR, etc.
- **Assignment Started and Ended:** This will default to today's date and time, but allows you to backdate an assignment, or set up your assignments for a future date, and add an end date.
- **Expiration and Return Date:** The date the request expires and the expected return time for the assigned item.
- **Condition Rating:** The condition of the item.
- **Account ID:** The account ID defaults from the operator's account ID. You can assign an account to this assignment. For more information regarding Account IDs and how they are used, please see the help section titled: Answers to Common Questions > Account IDs.
- **Assignment Ended:** The date and time the assignment ended.
- **Expected Return:** The expected date of time of the return.

Choose Assignee

Use this area to assign an item to an asset, department, location, or operator.



The type of entry required will change when you pick from the **Assign to** box. For example, you cannot enter an Operator ID when you have chosen Location.

Choose Assignee

Assign to

ASSET
DEPARTMENT
LOCATION
OPERATOR

Asset ID

ZSEQP-002

...

CAR 112

Once you choose the type, use the **ID** field to the right to enter a valid ID.

- If you know the ID exactly, you can type into this field and continue to the next.
- Otherwise, use the choice list button to open the choice list to search for an ID to select.

Select Operator ID

Operator ID Starts with:

RT

2 item(s) found

B C

And Operator ID contains:

Search Reset

Operator ID	Name	Department ID
RTB-03149	TONY BASCO	ER-107
RTC-03150	TIMOTHY CRINATHY	ER-107

Page 1 of 1



Note: If you select **LOCATION** as the assignee, you must enter the **Location ID**. The location chosen determines what racks show, and available bins are determined by the rack chosen. **Rack ID**, and **Bin ID** are optional. However, if a rack ID is entered, a bin ID must be entered.

Choose Assignee

Assign to

ASSET
DEPARTMENT
LOCATION
OPERATOR

Location ID

ZSLOC-001

Rack ID

...

Bin ID

...



Tip: Rack and bin locations are set up in the Yard Configuration screen. On this screen, the **Yard row ID** is the rack, and **Position ID** field entries are the bins. For more information on creating rack and bin IDs, refer to the help page for the Yard Configuration screen.

Choose Items

Use the search field to find the correct item to assign if you are not sure of the complete name. You can also use the **Assign** button or the **Templates** button to add items.



Note: For assets to display for this search, they must have a **Motor pool dispatch location ID** set up for the asset on the Asset Primary Information screen, Motor Pool tab.

Choose Items

Asset ID - Part ID - Serial Number - Description

Go

Assign

Templates

Status	Item ID	Description	Image	Type	Category	Location ID
--------	---------	-------------	-------	------	----------	-------------

Showing 0 records

To delete an item in this field:

1. Click the red X on the left side of the item.
2. This highlights the line in red, and displays a confirmation for deletion of the item.

Choose Assignee

Assign to

ASSET
 DEPARTMENT
 LOCATION
 OPERATOR

10.1.105.33 says:

Are you sure you wish to delete the selected row?

OK
Cancel

Choose Items

Go
Assign
Templates

	Status	Item ID	Description	Image	Type	Category
		GLOCK-17-0	HANDGUN; DESIGNED FOR PROFESSIONALS, THE GLOCK 17, IN 9X19, IS THE MOST WIDELY USED LAW ENFORCEMENT PISTOL WORLDWIDE.		PART	GLOCK DESC
		PC-001	2001 NEW FLYER C40LF POLICE CRUISER 001		ASSET	ZS POOL VEHIC RESOURCE TYF
		REMINGTON-M700-TACT-CH-0	RIFLE; DECADES IN THE TRENCHES WITH AMERICAS MILITARY AND LAW ENFORCEMENT INSPIRED THE TACTICAL RIFLE YOU SEE HERE UNEQUALED		PART	REMINGTON DI

3. Click **OK** to delete the item, or **Cancel** to leave the item.

Search Field

To find an item with the search field:

1. Enter an asset ID, part ID, serial number, or description of an item. You may also enter partial IDs of any of these items
2. Click **Go**.

3. The Select Items pop-in opens.

Select Items

Item Search List

ALL ASSET PART

	Item ID	Description	Image	Type	Category	Serial Number
☐	RUGER-SR40-0	HANDGUN; INTEGRAL ACCESSORY MOUNTING RAIL PROVIDES SPACE FOR MOUNTING LIGHTS, LASERS AND OTHER TACTICAL		PART	RUGER	
☐	RUGER-SR45-0	HANDGUN; DOVETAILED, HIGH-VISIBILITY 3-DOT SIGHT SYSTEM FEATURES A RAKED-FORWARD FRONT SIGHT FOR EASY		PART	RUGER	
☐	RUGER-SR9-0	HANDGUN; UNIQUE REVERSIBLE BACKSTRAP (FLAT OR ARCHED) THAT ALLOWS SHOOTERS TO QUICKLY CUSTOMIZE THE SIZE		PART	RUGER	
☐	ZSEQP-001	2001 NEW FLYER C40LF CAR		ASSET	ZS POOL VEHICLE RESOURCE TYPE 001	ZSSRL-001
☐	ZSEQP-002	2012 FORD F150 CAR 112		ASSET	ZS POOL VEHICLE RESOURCE TYPE 001	ZSSRL-002

Showing 5 records

Cancel Select

4. Use of this pop-in varies depending on search information you entered:

- If you entered information for a single item, it is already checked in this field.
- If you entered a partial search, or a search that came back with multiple results, use the following steps to find the correct item.
 - a. To narrow down the list further, click either the **Asset** or **Part** tabs.
 - b. Select the items needed.

5. Click **Select**. Or click **Cancel** to leave the selection pop-in.

6. The items are added to the list below the search field.

Choose Items

Asset ID - Part ID - Serial Number - Description Go Assign Templates

Status	Item ID	Description	Image	Type	Category	Location ID
X	ZSEQP-001	2001 NEW FLYER C40LF CAR		ASSET	ZS POOL VEHICLE RESOURCE TYPE 001	ZSLOC-001
X	RUGER-SR40-0	HANDGUN; INTEGRAL ACCESSORY MOUNTING RAIL PROVIDES SPACE FOR MOUNTING LIGHTS, LASERS AND OTHER TACTICAL ACCESSORIES.		PART	RUGER	ZSLOC-001

Showing 2 records

Assign Button

Use the **Assign** button to choose items from the catalog. For more information on how to use the catalog, refer to the [To use the Request Catalog button:](#) section.

Templates Button

Use the **Templates** button to assign a pre-built template of items. For example, you could use a new officer template that has all items for a new officer already set, rather than applying items one by one.

To apply a group of items with a template:

1. From the Item Assignment page, click **Templates**.

The 'Choose Items' form has a header bar with the title 'Choose Items'. Below the header is a search bar with the placeholder text 'Asset ID - Part ID - Serial Number - Description' and a 'Go' button. To the right of the search bar are two buttons: 'Assign' and 'Templates'. The 'Templates' button is circled in red. Below the search bar is a table with columns: Status, Item ID, Description, Image, and Type.

The *Select Templates pop-in displays.*

2. Click to select the correct template to apply.

The 'Select Templates' pop-in window has a title bar with the title 'Select Templates' and a close button. Below the title bar is a search filter section with the text 'Allocation template ID Starts with:' and a text input field. To the right of the input field is the text '2 item(s) found'. Below the input field are two buttons: 'N' and 'P'. Below these buttons is a search filter section with the text 'And Allocation template ID' and a dropdown menu. To the right of the dropdown menu is the text 'contains:'. Below the dropdown menu is a text input field. To the right of the input field are two buttons: 'Search' and 'Reset'. Below the search filter section is a table with columns: Allocation template ID and Description. The table has two rows: 'NNSA - TEMPLATE 1' and 'POLICE_OFFICER'. A hand cursor is pointing at the 'POLICE_OFFICER' row. Below the table is the text 'Page 1 of 1'.

3. The items are added to the Choose Items area.

The 'Choose Items' form has a header bar with the title 'Choose Items'. Below the header is a search bar with the placeholder text 'Asset ID - Part ID - Serial Number - Description' and a 'Go' button. To the right of the search bar are two buttons: 'Assign' and 'Templates'. Below the search bar is a table with columns: Status, Item ID, Description, Image, Type, and Category. The table has three rows: a row with a red 'X' in the Status column and a yellow highlighted Item ID, a row with a red 'X' in the Status column and the Item ID 'GLOCK-17-0', and a row with a red 'X' in the Status column and the Item ID 'REMINGTON-M700-TACT-CH-0'. Below the table is a pagination bar with the text 'Showing 3 records'.

4. In this example, a car has been assigned to the officer, but needs an actual ID for the asset (as shown in yellow as a required field for saving).

5. Use the chooser button to select an ID for this item.

✔ You must have stock at the issue location to be able to assign that part, or you must choose NFI (not from inventory).

📅 If you choose to use the NFI checkbox, it will not remove the item from inventory prior to assignment. Verify your stock numbers based on how you plan to use the system.

Notes

Add any notes to the assignment as needed.

Notes

ADDED NOTES FOR ASSIGNMENT OF EQUIPMENT TO OFFICER.

Finish the Assignment

When finished entering the assignment data you must save the assignment to create it. At the bottom of the page, click **Save**.

Notes

ADDED NOTES FOR ASSIGNMENT OF EQUIPMENT TO OFFICER.

Cancel

Save

If you have left out required fields, a message displays with the error.

Please fill out all required fields.

✕

2 item(s) failed to save. Review messages by clicking the Status icon.

✕

➡ Click the Status icon to see the errors.

	Status	Item ID	
✕	⚠	Value is required for Asset ID - PR-ERR: 3	
✕	⚠	REMINGTON-M700-TACT-CH-0	RIFLE; DECADES IN THE ENFORCEMENT INSPIRE

If the assignment is created successfully, you are returned to the portal front page and the Recent Assignments shows the newly assigned item with its Assignment No.

Actioning a Request

To respond to a request, use the bulk action icon in the top-left corner above the table, or click the edit pencil on that line. You can only use bulk auctioning on the Individual Requests tab.



Note: Depending on the item you choose to action, you may not have all the steps available. For example the Request Actions step only shows if the request is not COMPLETED or CANCELED.

Recent Requests

New Items (0)

Transfers (3)

Replacements (0)

Individual Requests (3)

PENDING

COMPLETED

CANCELED

	Notes	Request ID	Batch ID	Request for Type	Request Reason
		367	58	OPERATOR	TRANSFER

Showing 1 of 3 records

New Items (83)		Transfers (7)		Replacements (0)	
Action		Batch ID	Requests		
		132	1	BL	
		128	1	BL	
		114	2	BL	
		111	2	ST	
		110	1	LO	
		108	1	BL	
		107	1	BL	

To action a request:

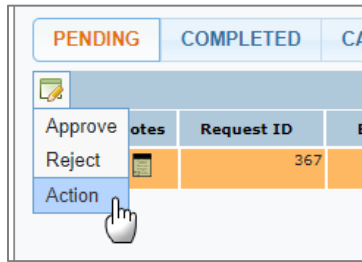
1. From the main Allocation and Assignment page, click **View Requests**.
2. Click the tab you need (New Items, Transfers, Replacements, or Individual Requests).



Note: Transfer items can only be edited in bulk with other transfer items.

3. Click either the pencil icon or the bulk action icon.

- If you are performing bulk actions, select **Action** after clicking the bulk action icon.



4. Continue on to the next steps to walk through the actioning process.

1. Selected Items

This area shows a summary of the selected request item information. If the detail is not available, for example, if no comments exist, then the Comments area will be blank.

Respond to Requests

Use this form to respond to assignment requests.

1 Selected Items

2 Status and Notes

3 Request Actions

Related Assignments

Selected Items

Request ID	Batch ID	Request For Type	Request Reason	Item	Qty	Req
367	58	OPERATOR	TRANSFER	PDMECHO-L-0	1	PENDING

Showing 1 record

☒ Mark request as Completed?

2. Status and Notes

The status here will show as PENDING. If a request is pending, you can change the approval status to APPROVED or REJECTED. Select your choice. A user must have the appropriate rights to approve or reject items. This is set with the approval setting in the [Allocation and Assignment Portal Settings](#) section.

1. Select a status change using the **Approval** field.

Request status change	
Status	PENDING
Approval	APPROVED ▼

2. Add any notes you have to the **Notes** field. Add notes for why an item is being rejected, or any other information needed for the request.

Notes
This assignment request has no notes yet.
New Note

Approval Status vs. Request Status

The approval status is either blank (not yet set), approved, or rejected. This is a response that is set by the quartermaster only. The only choices are APPROVED and REJECTED. This drop-down menu will not display if you do not have rights to approve the item as set up by the administrator.

The request status is either PENDING, COMPLETED, or CANCELED. This status is set by the system or the user. **Users can cancel** their own requests if they have not been approved or rejected yet. **Quartermasters can choose to complete** a request. If neither action has been taken, the request is PENDING.

Examples:

- A request can be REJECTED, and then marked complete, which indicates that the quartermaster did not approve the action, and they consider it done.
- A request can be REJECTED, but left pending, so that the quartermaster may contact the person who made it to explain why it was rejected, or to offer an alternate solution.
- A request can be marked APPROVED, but left in pending status while more stock is on order if the quartermaster cannot complete a new assignment yet.
- A request can be canceled by a user. This will cause the approval status to remain blank, and the item will be marked CANCELED.
- While in PENDING status, an item can be changed from APPROVED to REJECTED (or vice versa).

3. Request Actions

This section can have different displays based on the item you are actioning, and its status. Further actions appear that vary based on the availability of actions and the type of request:

Respond to Requests
Use this form to respond to assignment requests.

1 Selected Items ✓

2 Status and Notes ✓

3 **Request Actions**

Related Assignments

Request Actions

New Assignment

☒ Assign a new item?
Choosing this option will open the New Assignment page after choosing Done below

Respond to Requests
Use this form to respond to assignment requests.

1 Selected Items ✓

2 Status and Notes ✓

3 **Request Actions**

Related Assignments

Request Actions

Original Assignment

☐ Update original assignment?

Change Status To ...

Date of Change ...

Condition Rating ...

Notes

Depending on the availability of actions and the type of request, the quartermaster can choose to complete one or more items in requests, or all, at the time of your request, or any time later while the request is still PENDING.

Once completed or canceled, you cannot return here.

Update original assignment?: This option only shows when an item has been previously requested and assigned and the user is re-requesting the item.

Change status to (LOST, RETURNED, DISPOSED, BROKEN, STOLEN): This will default to the reason that the user chose when creating the request, if possible.

Additional options may be created for these statuses. These additional statuses are mapped back to one of these original statuses. For example, you can create a status of CRACKED and SNAPPED, but both of these would map back to BROKEN. These additional options can be set up on the Allocation and Assignment Status screen.

You are allowed to change this. For example, if the person making the request chose LOST but you feel you feel DISPOSED is a better option after speaking with that person, you can choose that instead.

Date of change: This will default to the current date, but can be backdated or postdated as needed.

Condition Rating

Assign a new item?

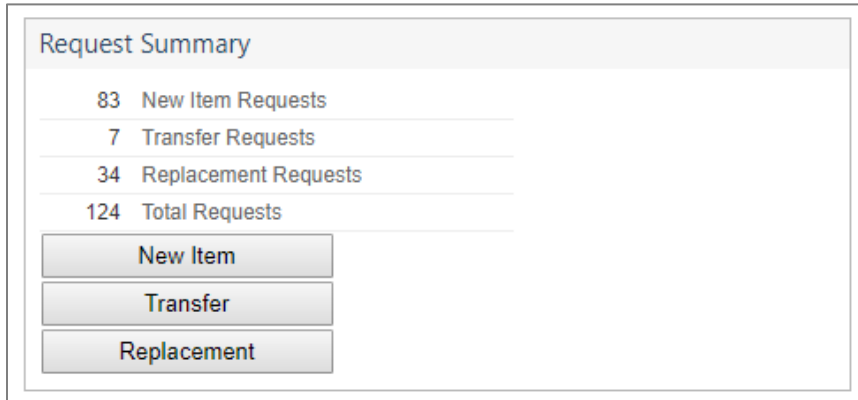
- Choose this option and click **Done** to open the [New Assignment Form](#) page.
- As discussed above, the New Assignment Form is used any time you make an assignment, and at times (depending on how you reach it) certain criteria will be filled in already.
- In this case, the form will have details filled in based on your choices. You may still need to choose a specific item if the user just entered comments, or if a more appropriate item will be assigned.

Mark request as Completed?

This will complete the request and prevent further edits.

Request Summary Gadget

The Request Summary Gadget allows you to view numbers for new item, transfer, replacement, and total requests. Clicking the **New Item**, **Transfer**, or **Replacement** buttons here opens the Recent Requests page to that particular tab.



The Request Summary Gadget displays a table with request counts and three action buttons. The table has a header 'Request Summary' and four rows: '83 New Item Requests', '7 Transfer Requests', '34 Replacement Requests', and '124 Total Requests'. Below the table are three buttons: 'New Item', 'Transfer', and 'Replacement'.

Request Summary	
83	New Item Requests
7	Transfer Requests
34	Replacement Requests
124	Total Requests

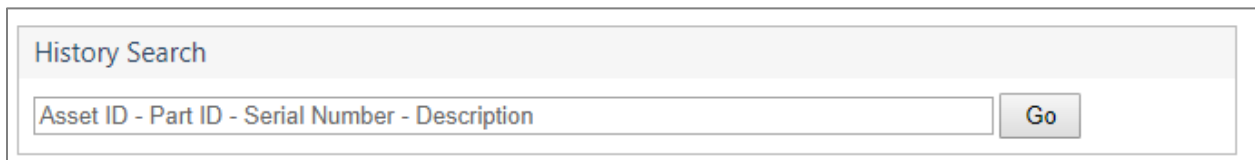
[New Item](#)

[Transfer](#)

[Replacement](#)

Gadget Searches

History Search Gadget



The History Search Gadget features a search field with the placeholder text 'Asset ID - Part ID - Serial Number - Description' and a 'Go' button.

History Search

[Go](#)

This history gadgets allows you to search for items such as assets and parts and open the Assignment History gadget for the item. This search displays what is assigned to the item.

To search for an item:

1. In the History Search gadget, type a search into the search field. This can be something such as a full or partial asset ID, part ID, description, etc.
2. Click **Go**.



The History Search Gadget interface is shown with the 'Go' button highlighted by a red circle.

History Search

[Go](#)

3. The Item Search List pop-in displays.

Select an Item

Item Search List

ALL ASSET PART

	Item ID	Description	Image	Type	Category	Serial Number
☐	RUGER-SR40-0	HANDGUN; INTEGRAL ACCESSORY MOUNTING RAIL PROVIDES SPACE FOR MOUNTING LIGHTS, LASERS AND OTHER TACTICAL		PART	RUGER	
☐	RUGER-SR45-0	HANDGUN; DOVETAILED, HIGH-VISIBILITY 3-DOT SIGHT SYSTEM FEATURES A RAKED-FORWARD FRONT SIGHT FOR EASY		PART	RUGER	
☐	RUGER-SR9-0	HANDGUN; UNIQUE REVERSIBLE BACKSTRAP (FLAT OR ARCHED) THAT ALLOWS SHOOTERS TO QUICKLY CUSTOMIZE THE SIZE		PART	RUGER	
☐	EQP-001	2001 NEW FLYER C40LF==Meters: 1-100000 MILES; 2-0 NONE==CAR		ASSET	POOL VEHICLE RESOURCE TYPE 001	SRL-001
☐	EQP-002	2012 FORD F150==Meters: 1-100 HOURS; 2-0 NONE==CAR 112		ASSET	POOL VEHICLE RESOURCE TYPE 001	SRL-002

Showing 5 records

Cancel Select

- Stay on the **ALL** tab to view all items that match the search or click the **ASSET** or **PART** tab to open the corresponding list of items.
- Click a radio button to select a line item. Only one item can be selected at a time.

Select an Item

Item Search List

ALL ASSET PART

	Item ID	Description
☐	RUGER-SR40-0	HANDGUN; INTEGRAL ACCESSORY MOUNTING RAIL PROVIDES SPACE FOR MOUNTING LIGHTS, LASERS AND OTHER TACTICAL
☒	RUGER-SR45-0	HANDGUN; DOVETAILED, HIGH-VISIBILITY 3-DOT SIGHT SYSTEM FEATURES A RAKED-FORWARD FRONT SIGHT FOR EASY
☐	RUGER-SR9-0	HANDGUN; UNIQUE REVERSIBLE BACKSTRAP (FLAT OR ARCHED) THAT ALLOWS SHOOTERS TO QUICKLY CUSTOMIZE THE SIZE
☐	ZSEQP-001	2001 NEW FLYER C40LF==Meters: 1-100000 M

- Click **Select**.

Select an Item

Item Search List

ALL ASSET PART

	Item ID	Description	Image	Type	Category	Serial Number
☐	RUGER-SR40-0	HANDGUN; INTEGRAL ACCESSORY MOUNTING RAIL PROVIDES SPACE FOR MOUNTING LIGHTS, LASERS AND OTHER TACTICAL		PART	RUGER	
☒	RUGER-SR45-0	HANDGUN; DOVETAILED, HIGH-VISIBILITY 3-DOT SIGHT SYSTEM FEATURES A RAKED-FORWARD FRONT SIGHT FOR EASY		PART	RUGER	
☐	RUGER-SR9-0	HANDGUN; UNIQUE REVERSIBLE BACKSTRAP (FLAT OR ARCHED) THAT ALLOWS SHOOTERS TO QUICKLY CUSTOMIZE THE SIZE		PART	RUGER	
☐	EQP-001	2001 NEW FLYER C40LF==Meters: 1-100000 MILES; 2-0 NONE==CAR		ASSET	POOL VEHICLE RESOURCE TYPE 001	SRL-001
☐	EQP-002	2012 FORD F150==Meters: 1-100 HOURS; 2-0 NONE==CAR 112		ASSET	POOL VEHICLE RESOURCE TYPE 001	SRL-002

Showing 5 records

Cancel Select

The Assigned Item Detail page displays.

Assigned Item Detail									
Item Type	PART	Consumable	Yes						
Item ID	RUGER-SR45-0	Description	HANDGUN; DOVETAILED, HIGH-VISIBILITY 3-DOT SIGHT SYSTEM FEATURES A RAKED-FORWARD FRONT SIGHT FOR EASY REMOVAL FROM THE HOLSTER AN						
Manufacturer	Model								
Assignment History									
ASSIGNED LOANED FINISHED CLOSED ALL									
	Action	No	Status	Assigned to ID	Assigned to Name	Notes	Serial Number	Quantity	Date I
☐		813	ASSIGNED					1.00	04/11/2017
☐		410	ASSIGNED					5.00	11/21/2016
☐		1012	ASSIGNED					1.00	05/24/2017
Showing 3 of 6 records									
Back Assign This Item Assignment Item History Report									

For more information on this page, refer to the [Assigned Item Detail Page](#) section.

Item Search Gadget

Item Search

The item search allows you to search for Assets and Parts by: Asset ID, Asset License, Asset Number, Asset Serial Number (VIN), Asset Manufacturer ID, Asset Model ID, Asset Description, Part Number, Part Serial Number, Part Keyword, and Part Short Description. This search displays what this item is assigned to.



Note: Item search does not return parts with suffixes that are associated with CORE-AWAITING WARRANTY, CORE-AWAITING REBUILD, or SCRAPPED parts if the **Enable part status tracking** option is enabled on the Parts – Setup – Options screen, Part Status Tracking tab.

Use the settings from the portal (see [Allocation and Assignment Settings](#) section above) to choose which of these fields are searched, and to set the default text for this box.

- If your search returns multiple items, you will be shown the item chooser:

Please choose an item

Assets found: 37

Asset ID	Year	Manufacturer	Model	Description	Serial number
1000-51	2013	DODGE TRUCK	1500 R CAB PU	2 DOOR PICK UP	35495710475
A-1000	2010	CHVRL	MALIBU	CHEV. MALIBU 4 DOOR SEDAN	A-1000-CHEVMALIBU01
A-1006	2010	CHVRL	MALIBU	CHEV. MALIBU 4 DOOR SEDAN	A-1000-CHEVMALIBU06
A-1007	2010	CHVRL	MALIBU	CHEV. MALIBU 4 DOOR SEDAN	A-1000-CHEVMALIBU07
C-1000	2010	CHVRL	CAVALIER	CHEV. CAVALIER 4 DOOR SEDAN	C-1000-CHEVCAVALIER01
C1-1000	2010	2X TRAILER	2X TRAILER	COMPONENT	2010-C-1000-01
C1-1002	2010	2X TRAILER	2X TRAILER	COMPONENT	2010-C-1000-02
C1-1003	2010	2X TRAILER	2X TRAILER	COMPONENT	2010-C-1000-03
C1-1004	2010	2X TRAILER	2X TRAILER	COMPONENT	2010-C-1000-04
C1-1005	2010	2X TRAILER	2X TRAILER	COMPONENT	2010-C-1000-05

Parts found: 31

Part ID	Suffix	Keyword	Description	Consumable	Serialized
02-23-1000-SWD	0	STARTER	STARTER ASSY (CHEVROLET 3500HD TRUCK)	Yes	No
1000-123	0	SAFETY	EAR PLUGS	Yes	No
1000-2395A	0	TRANSIT	ROLLER ASSY 23K	Yes	No
121000-3470	2		ALT	No	No
121000-3630-SWD	0	ALTERNATOR	ALTERNATOR	Yes	No
121000-4040	0	ALT	ALT	No	No
121000-4151	0		ALTERNATOR	No	No
215125-1000-NF	0	TRANSIT	PANEL FRONT MASK RTM 6600'S	Yes	No
22-1000-SWD	0	KIT	KIT RACK AND PINON (CHEVY TRUCK)	Yes	No

Click on an Asset ID or Part ID to view the detail page for the item you have chosen (see [Assigned Item Detail](#) page above for information regarding this page).

- If your search only returns one item, you will be taken directly to the [Assigned Item Detail](#) page.

Operator Search Gadget

Operator Search

Operator ID or Name - Employee ID or Name - User ID or Name

The Operator Search allows you to find anyone with an Operator ID in the system. The text entered will be searched across Operator ID and name, related Employee ID and name, and related User ID and name.

For example, when searching "LE" in my system, the following results display:

Operators found: 4

Operator ID	Operator Name	Employee ID and Name	User ID and Name
KE	KELLEY	KE - KELLEY	KE - KE
RAOP-TEST1	RAOP-TEST1	CNEMP010 - EMPLOYEE 010	LEE - LEE
SERENA	SERENA SAMPLE		
TESTDELETE	T		

The characters "LE" are found in:

- The Operator and Employee (but not user) in row 1
- The User ID only in row 2
- The Operator Name only in row 3
- The Operator ID only in row 4

Because of the broad list of fields that this search is able to cross, you can find people who you can assign items to with something as simple as a few letters of their name.

- ✔ This also means that if you have a very large list of users, this search could take a very long time. We recommend using detailed entries when searching (unique Operator ID or full last name) in that case specifically.

Using the settings from the portal (see [Allocation and Assignment Settings](#) section above), you can set up the default text for this box.

If your search returns multiple matches, you will see a list similar to the one above. If your search only returns one result, you will go directly to the Operator [Assign-to Detail](#) page.

Inspection Summary Gadget

The Inspection Summary gadget shows a count of upcoming services and inspections, and a button to allow you to view those inspections.

A screenshot of the 'Inspection Summary' gadget. It has a light gray header with the title 'Inspection Summary'. Below the header, the text 'Services / Inspections Due: 2' is displayed on the left, and a button labeled 'View Inspections' is on the right.

You can change the default number of days to project forward for the inspection list via portal settings (see [Allocation and Assignment Module Settings](#) section above).

A screenshot of the 'Services / Inspections Options' settings box. It has a blue header with the title 'Services / Inspections Options'. Below the header, the text 'Services / inspections days to project' is followed by a text input field containing the number '5'.

If you have this set to 5 days, for example, it will show you all inspections currently past due, and ones coming due within the next 5 days.

When you click the **View Inspections** button, you will see the Inspection Detail page with inspection details for your currently chosen location so you can oversee your inspections based on location.

Current Location ACA - ASSET CENTRAL ADMINISTRATION ▾

Inspection Detail
Run ID 59382 Due in the next 5 days

Services / Inspections Due: 2

Asset ID ▴	Year	Make	Model	Description	Due type	Days till due	Days late
11500	1996	GILLIG	PHANTOM	1996 - 35 FT DIESEL BUS	DATE	0	5439
350	1996	GILLIG	PHANTOM	1996 - 35 FT DIESEL BUS	DATE	0	732

Back

Web Screens Gadget

The web screens gadget shows a convenient list of web screens that are used for setup and administration of assignments and related data. (Note that these screens can also be accessed from the Web Screen menu, as usual.) This list of screens is not customizable. Any screen that your user ID does not have screen rights to will not be visible in the list.

Web Screens
Allocation and Assignment
Assignment Request
Assets - Primary Information
Components - Primary Information
Parts - Primary Information
Parts - Location Information
Parts Issues and Returns
Parts - Direct Issues
Parts - Transfers
Parts - Adjustments
Serialized Parts

For example, if you need to add assets or parts, you can do so from the screens, and you can launch the screens quickly from this menu.

We have also included the links to the two new screens for this portal, the Allocation and Assignment screen and the Assignment Requests screen.

✓ *It is recommended to not use the screens directly to make assignments.* They are included in the Web Screens Gadget for easy access for verification/troubleshooting; but please use the portals for all functions possible, as the functions within the portal are the main focus of this module.

4. Assignment Requests

The **Assignment Request Portal** included with the Allocation and Assignment module allows users to create requests for items that are currently assigned or were assigned in the past, and to request new items. These requests then go to the Allocation and Assignment Portal in a filterable list so they can be acted upon and turned from a *Request* into an *Assignment* (the **View Requests** button from Allocation and Assignment Portal front page).

Assignment Request Portal 

Request items or replacements or report problems online

[Request Items or Report a Problem](#)

Your assignment requests

[PENDING](#) [CANCELED](#) [COMPLETED](#) [ALL](#)

Search...

Cancel	Notes	Request ID	Request Status	Approval Status	Request Reason	Item Description	Quantity	Requested For	Assign to ID
Cancel		105	PENDING		NEW ITEM	AR-15 - BODY ARMOR, THE ARMOR EXPRESS BULLETPROOF HELMET SELECTION HAS BEEN	1.00	OPERATOR	OP
Cancel		106	PENDING		NEW ITEM	GLON-17-7-F-0 - HANDGUN, OVER THE YEARS, POLICE, SPECIAL UNITS, SWAT AND	1.00	OPERATOR	OP
		107	PENDING	APPROVED	NEW ITEM	CHRONO-1-0 - GLOVE, THE ARMA TURT GLOVE PROVIDES MEDIUM IMPACT PROTECTION AND	1.00	OPERATOR	OP
		108	PENDING	APPROVED	NEW ITEM	BULLETPROOF - HANDGUN, BOWTIE-10, HIGH-VISIBILITY 3-DOT SHOOT SYSTEM	1.00	OPERATOR	OP
		111	PENDING	APPROVED	NEW ITEM	SEA-10-1-0-10-10-10-10 - RIFLE, THE NEW HAP-10 IS A DEDICATED HAP-10	1.00	OPERATOR	OP
		112	PENDING	APPROVED	NEW ITEM	APPROVED - RIFLE, WITH FOUR OF BARRIS AND MULTIMODE SYSTEM ACCESS, THE AFS	1.00	OPERATOR	OP
Cancel		117	PENDING		LOST	RIDE-10-1 - BODY ARMOR, RIDE - A HIGHER LEVEL OF BODY ARMOR PROTECTION,	1.00	OPERATOR	OP
Cancel		118	PENDING		LOST	SEA-10-1-0-10-10-10 - RIFLE, FORGED,	1.00	OPERATOR	OP

The Assignment Request portal front page shows any logged in user the following:

- A button to make a request or report a problem.
 - A summary of previous requests and statuses, with the ability to cancel items still Pending.
-  Note: These tables are sortable by clicking the name of the column. You can also filter for items in real-time by typing in the Search field.
- To see more or fewer columns, right click the column headers to open the Table Options pop-in. Check or uncheck boxes to display or hide columns. Columns available include Cancel, Notes, Request ID, Request Status, Approval Status, Request Reason, Item Description, Manufacturer, Model, Quantity, Requested For, Assign to ID, Justification, and Request Date. Columns can also be sorted by the column information by clicking the column name.



See [Assignment Request Module Settings](#) area above for information on module settings available.

Setting up Catalogs

For more detailed information on the following screens, refer to the help page for the screen you need.

1. Set up a catalog using the Catalogs screen.



Note: For the new catalog to display in the list, you must add a catalog category to your catalog.

2. Create a catalog category using the Catalog Categories screen.
3. Be sure to assign either the pool/resource types or product categories to the Catalog Category to display in the catalog list. Product categories must be created on the Product Categories screen before they can be added here. Pool/Resource types must be created on the Pool/Resources Types screen.
4. On the Catalogs screen, add your new catalog categories to your catalog.
5. If needed, create your new parts for the catalog. If using existing parts, on the Parts-Primary Information screen, Basic Info tab, make sure the **Product category ID** field has the correct category. The item does have to stocked parts at the location for the catalog.
6. If needed, create your new assets for the catalog. If using existing assets, on the Asset Primary Information screen, Motor Pool tab, make sure the **Pool vehicle type** field has the correct Pool/Resource Type category.

Location Setup for Assignments

The Current Location drop-down on the Catalog browser is populated by the operator's available Motor Pool locations as defined in the **Allowed to rent/request from these locations** section on the Operators - Primary Information screen, Motor Pool/Resources tab. The **Preferred assignment request location ID** field defaults the **Current Location** selected value in the Catalog browser. This must be a valid field.

The screenshot shows the 'Motor Pool/Resources' screen. It contains several input fields and a table. A red circle highlights the 'Preferred assignment request location ID' field. Another red circle highlights the 'Allowed to rent/request from these locations' table.

Motor Pool/Resources

Preferred dispatch location ID

☐ Allowed to rent/request from all locations

Preferred assignment request location ID

Allowed to rent/request from these locations			
Row #	Delete	Location ID	Location name

In order for an operator to have access to a resource type in the catalog browser by location, the location must exist on both the **Allowed to rent/request from these locations** field, and the Pool Vehicle/Resource Types screen, Supported Locations tab.



Note: For more information on setting up locations for allocation and assignment duties, refer to the [Configuring Allocation and Assignment Locations](#) section above in the document.

Parts Setup for Assignment

The part must have a parts location record (as set up on Parts – Location Information screen, Basic Info tab) available at a location from which the operator has access to rent (for example, the **Allowed to rent/request from these locations** field). By default, when the parts location record is created, inventory must be added for items to show as available. Inventory is added on the Parts - Adjustments screen.

Parts available for request are only parts available in locations that are set as Allocation and Assignment locations. This setting is found on the Locations – Primary Information page, Functions tab, and is called **Allocation and assignment (quartermaster)**.

Submitting a Request

Users of the system (operators with a user ID or any other user, including the Quartermaster, if they choose) can use the **Request Items or Report a Problem** button to submit assignment requests.

The screenshot shows a web interface with a header bar containing the text "Request items or replacements, or report problems online". Below this header is a large, light gray button with the text "Request Items or Report a Problem" centered on it.

This opens the Request Items Online page.



Within the [Allocation and Assignment Module Basic Settings](#) section above, the [Assignment Request Portal Settings](#) section explains how you can change the text on this page to include directions specific to your organization, if needed.

The form walks users through their options.

1. WHO is this for?

This area allows a user to pick an asset, department, location, or operator to request items for.

Choose one of the quick-links to move on directly to the next step. Or continue to the next section to specify something else if the lookup is available.

- **For me:** Uses the operator ID associated with the logged-in user (if defined).
- **For my location:** Uses the assigned location associated with the logged-in user's operator ID (if defined on the Operators – Primary Information screen, Motor Pool/Resources tab, **Preferred assignment request location ID** field). If no Operator ID, the field does not display.
- **For my department:** Uses the department assigned to the logged-in user's operator ID, which is required. If no operator ID, then this does not display.
- **For something else (specify):** This option only shows if set up in the portal settings for step 1. This option gives the user a choice-list style entry option. Clicking the **For something else (specify)** quick-link will show the **Request for** fields. Choose the option of Request for and ID, then click **Next**. Options not set up in the settings are greyed out if you select them in the choice-list.

The logged-in user will see each of these options only if the above data conditions are met.

Choosing an ID

1. Click either **For Me**, **For My Location**, or **For My Department** to autofill the ID field. Otherwise, enter an ID and click the **Lookup ID** button, or enter a partial ID and click the chooser icon  to open the filter to find an ID.

Request Items Online

Use this form to request new or replacement items and to report problems.

1 WHO is this for?

2 REASON for request

3 CHOOSE your items

4 REVIEW and submit

(0) items in list

Who or what is this for?

Please specify who or what this request applies to.

For Me

For My Location

For My Department

Request for

DEPARTMENT

LOCATION

OPERATOR

ID

ZSOP

Please verify your selection before proceeding to the next step.

Operator Detail

Operator ID	ZSOP	Operator Name	ZS OPERATOR
Employee ID	ZSEMP	Assigned Location	ZSLOC-001 - ZS LOCATION
Work Phone		Department ID	BILLING-1 - BILLING DEPARTMENT 1
Job Title		Occupation	S6
Operator License	ZSLICENSE1		

Cancel

Back

Next

2. Click **Next** to continue.

A green checkmark shows on the completed step.

2. REASON for request

This step allows you to choose the reason for the request.

Request Items Online
Use this form to request new or replacement items and to report problems.

1 WHO is this for? ✓ **What is the reason for your request?**

2 REASON for request

3 CHOOSE your items

4 REVIEW and submit

(0) items in list

Operator Detail

Operator ID	ZSOP	Operator Name	ZS OPERATOR
Employee ID	ZSEMP	Assigned Location	ZSLOC-001 - ZS LOCATION
Work Phone		Department ID	BILLING-1 - BILLING DEPARTMENT 1
Job Title		Occupation	S6
Operator License	ZSLICENSE1		

Choose the reason for the request:

- Click the button for the reason of the request. Choose between the following options:
 - New Item
 - Transfer
 - Replacement:** Replacement options include **Broken**, **Expired**, **Lost**, or **Stolen**.
- Once you click the button, the next step opens. Depending on the reason, the next step will open to different displays

3. CHOOSE your items

Use this step to choose the items in the request. Depending on the reason chosen for the request, the display will be different in this step. You have the choice to **Request Catalog** or make a **Direct Request** while viewing **Assigned** items (with pictures) or **All** items (detailed table).

Request Items Online

Use this form to request new or replacement items and to report problems.

1 WHO is this for?
2 REASON for request
3 CHOOSE your items
4 REVIEW and submit

0 item(s) in list

What items are you requesting?

Request Catalog
Direct Request

ASSIGNED
ALL

INV-UNI-PANTS-1-0

UNI - PANTS; UNIFORM PANTS

Assignment No 6

Date Assigned 02/22/2018

Date Expected Return

Date Expired

Quantity 1.00

ASSIGNED

INV-UNI-HAT-0

UNI - HAT 1; UNIFORM HAT

Assignment No 4

Date Assigned 02/22/2018

Date Expected Return

Date Expired

Quantity 1.00

ASSIGNED

The **Request Catalog** and **Direct Request** buttons have module settings that must be enabled in order to appear. Click the pencil icon next to the Allocation and Assignment Portal and go to Item Request Step 3 Options to enable or disable **Supported request types**.

Request Catalog enables users to submit a request by browsing the catalog. **Direct Request** means the user must enter details about what they need and then submit the request.

For transfer or replacement items, the assignment number (the **No** column on the left side) is linked to the new request that will be created. This updates the assignment number when updating the original request as well.

Notes

- Parts must be assigned to an Allocation and Assignment location to be available for requests in this portal.
- Items that have a serial number will enable the Serial Number column to display in the list with the serial number and description. If no items in the list have serial numbers, the Serial Number column will not display.
- Once you have added items to your list, a link shows on the left side. Click the **(#) items in the list** link to go to step 3 at any time to see your list.
 - Assigned items** are items with status as ASSIGNED (items that have not been replaced, returned or reported lost/stolen)

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- **All Items:** This shows all items supported by that location. This will also show past items – no matter what their status is currently. If the assignment is not current, it will also show the assignment end date.
 - **Parts:** The part location record must support this location to show, or have the **Supports all locations** option chosen in the Parts – Location Information screen.
 - **Assets:** All assets will display the top-level category for each supported location.
- Once you have added items to your cart under a reason (New Item, Transfer, or Replacement), if you change that reason, a confirmation message will appear warning that changing the reason of the request will empty the cart. Click **OK** to clear your cart and choose a new reason, or click **Cancel** to keep your cart and finish the request as is.

New Item

Clicking **New Item** in the previous step opens straight to the assigned items list.

-  **Note:** The choices of catalogs available to the user are determined by setup on the Operator – Primary Information screen, Motor Pool/Resources tab. An operator can have access to limited pool/resource types or product categories, or be allowed access to all pool/resource types or product categories if the **Allowed to rent/request all pool vehicle/resource types** or **Allowed to request all product categories** checkboxes are checked as shown below.

Motor Pool/Resources

Preferred dispatch location ID

☐ Allowed to rent/request from all locations

Preferred assignment request location ID

Allowed to rent/request from these locations

Row #	Delete	Location ID	Location name

Preferred pool vehicle type

☐ Allowed to rent/request all pool vehicle/resource types

Allowed to rent/request these pool vehicle/resource types

Row #	Delete	Pool vehicle type	Description

Pool unit preferences

☐ Allowed to request all product categories

Allowed to request these product categories

Row #	Delete	Product category ID	Description

To use the Request Catalog button, or find a new item:

1. Click **Request Catalog** to open the Select Request Item pop-in.

Select Request Item

Current Location

Select a Category

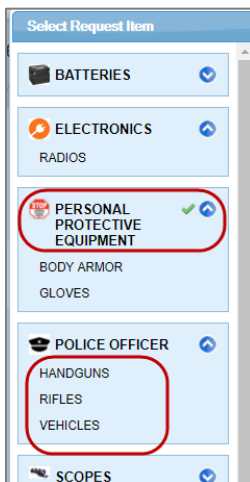
- BATTERIES
- ELECTRONICS
- PERSONAL PROTECTIVE EQUIPMENT
- POLICE OFFICER
- SCOPES
- TONYA
- TRUCKS, VANS, CARS 2
- WEAPONS

Can't find item?

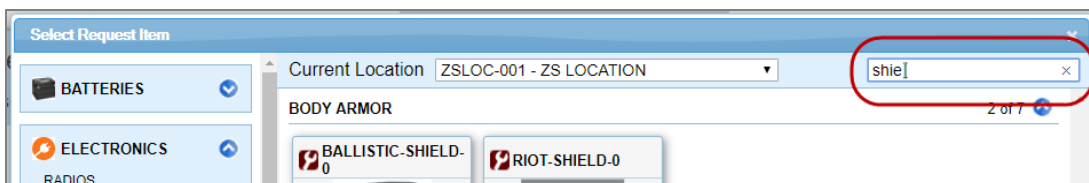
Cancel (0) Pending Items Add to List

 **Note:** Items show as either **Available** or **Out of Stock** depending on availability at the part's location record.

2. Choose your location from the drop-down, or search in the **Quick Search** box.
3. Along the left column, choose the catalog to add. Click the top-level catalog name to include all items in the catalog (such as PERSONAL PROTECTIVE EQUIPMENT would include the BODY ARMOR and GLOVES lower-level items) or click the blue button to expand and show the lower level items to choose (such as HANDGUNS, RIFLES, or VEHICLES as shown below).



4. Use the Quick Search field in the top-right corner to enter a few letters or keyword to narrow the list of items.

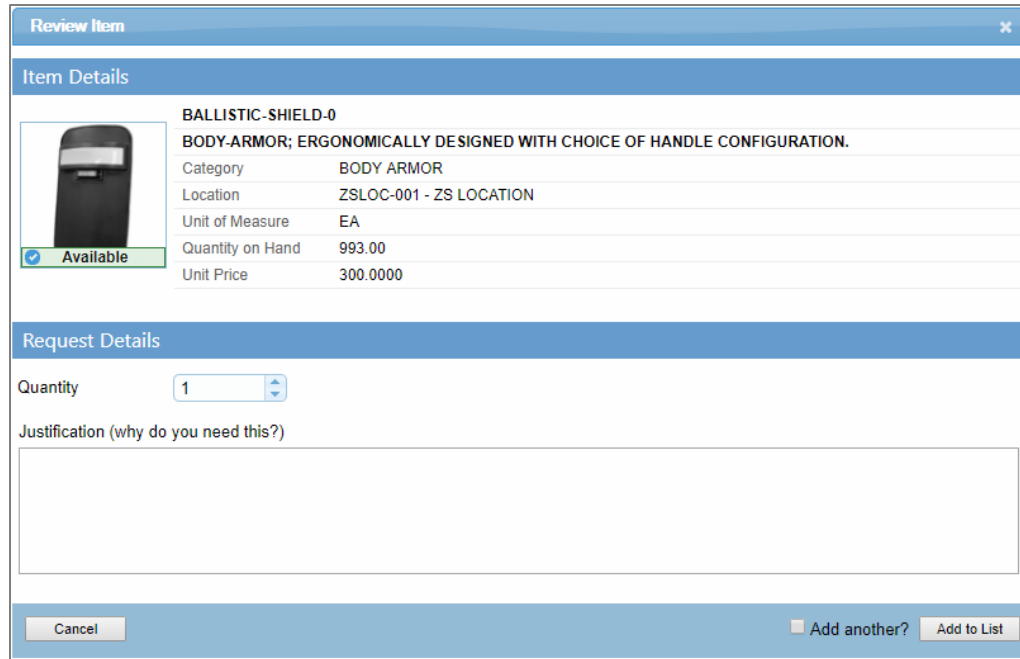


5. Use one of the processes below depending on whether item you need is available in the list, or, if you cannot find the needed item in the list, by using the **Can't find item?** link.

Clicking the item you need from the list:

- i. Click the item in the list to select it.

This opens the Review Item pop-in.



Review Item

Item Details

 **BALLISTIC-SHIELD-0**
BODY-ARMOR; ERGONOMICALLY DESIGNED WITH CHOICE OF HANDLE CONFIGURATION.

Category	BODY ARMOR
Location	ZSLOC-001 - ZS LOCATION
Unit of Measure	EA
Quantity on Hand	993.00
Unit Price	300.0000

☒ Available

Request Details

Quantity:

Justification (why do you need this?):

☐ Add another?

- ii. Continue to the next step.

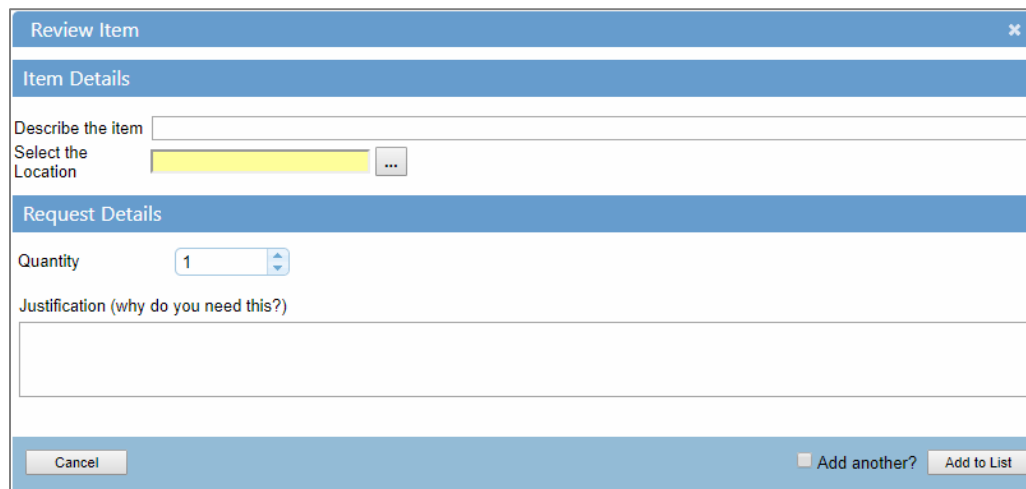
Using the Can't find item link

- i. Click the **Can't find item?** link.



Note: If the Assignment Request portal option to **Use the Request Catalog** is not checked, this button is found after clicking the **Request New Item** button on Step 3.

This opens the Review Item pop-in.



Review Item

Item Details

Describe the item:

Select the Location:

Request Details

Quantity:

Justification (why do you need this?):

☐ Add another?

- ii. Enter the item description.

- iii. Select your location. This field allows you to choose from the locations that the current user is allow to rent or request items from.
- iv. Continue to the next step.
6. Adjust the quantity as needed. For serialized parts, the quantity is set as **1** and is not editable. The quantity selected must be equal to or less than the amount available on hand.
7. Enter the justification for the request.
8. You can add one item or multiple items with the steps below:

To add one item:

- i. Click **Add to List**.

*The Review Item and Select Request Item pop-ins close and you are taken back to the **Choose your items** tab.*

To add multiple items:

- i. Check the **Add Another?** checkbox.
- ii. Click **Add to List**.

This takes you back to the Select Request Item pop-in.

- iii. Choose another item and repeat these steps until you are done adding items. After adding the last item, do not check the **Add another?** checkbox when you click **Add to List**.

*The Review Item and Select Request Item pop-ins close and you are taken back to the **WHAT do you need?** tab.*

To Action an Existing Item:

Action an existing item by clicking the notepad icon (as shown below) next to any currently assigned item, or a previously assigned item.

		
	RISE-M-0 BODY-ARMOR; RISE - A HIGHER LEVEL OF BODY ARMOR PROTECTION. REVOLUTIONARY CONCEALED SOFT BODY ARMOR PLATFORM.	
	Assignment No	975
	Date Assigned	05/22/2017
	Date Expected Return	
	Date Expired	
	Quantity	1.00

When you choose to action an item, the same Assignment Request Line Item shows, but it shows with the item section filled already for the ASSET or PART.

Item Type	PART	Consumable	Yes
Item ID	RISE-M-0	Description	BODY-ARMOR; RISE - A HIGHER LEVEL OF BODY ARMOR PROTECTION. REVOLUTIONARY CONCEALED SOFT BODY ARMOR PLATFORM.
Manufacturer	Model		

Quantity: 1

Justification (why do you need this?):

Buttons: Cancel, Add



Manufacturer and **Model** show only for assets. Serial number shows only for assets and for serialized parts.

1. Choose the quantity.
2. Enter the justification.
3. Click **Add**.

Transfer

When transferring items, the next step opens with current items available for transfer. Locations are based on operator's supported locations.

To see more or fewer columns, right click the column headers to open the Table Options pop-in. Check or uncheck boxes to display or hide columns. Columns available include No, Status, Justification, Item, Description, Quantity, Image, Date Assigned, Date Expected Return, Date Expired, Location ID, Bid ID, Rack ID, and Serial Number.

Request Items Online

Use this form to request new or replacement items and to report problems.

1 WHO is this for? ✓

2 REASON for request ✓

3 CHOOSE your items

4 REVIEW and submit

(0) items in list

What items are you requesting to transfer?

Transfer to Location ...

☐	No	Status	Justification	Item	Description	Quantity	Image
☐	649	ASSIGN...		ZSEQP-001	2001 NEW FLYER C40LF CAR	3.00	
☐	1055	ASSIGN...		TSHIRT-0	SAFETY; TSHIRT	1.00	
☐	1056	ASSIGN...		TSHIRT-0	SAFETY; TSHIRT	1.00	
☐	838	ASSIGN...		TSHIRT-0	SAFETY; TSHIRT	1.00	
☐	376	ASSIGN...		TSHIRT-0	SAFETY; TSHIRT	3.00	
☐	822	ASSIGN...		S&W-M&P15-SPORT-0	RIFLE; FORGED, INTEGRAL TRIGGER GUARD, ARMORNITE FINISH (DURABLE CORROSION	1.00	
☐	821	ASSIGN...		S&W-M&P-15-22-SPORT-0	RIFLE; 10 M&P SLIM HANDGUARD WITH MAGPUL M-LOK	1.00	
☐	820	ASSIGN...		S&W-M&P-15-22-HV-MOON-0	RIFLE; THE NEW M&P15-22 IS A DEDICATED M&P15-FORMAT RIFLE DESIGNED AND BUILT	1.00	
☐	759	ASSIGN...		S&W-M&P-15-22-HV-MOON-0	RIFLE; THE NEW M&P15-22 IS A DEDICATED M&P15-FORMAT RIFLE DESIGNED AND BUILT	1.00	
☐	814	ASSIGN...		RUGER-SR9-0	HANDGUN; UNIQUE REVERSIBLE BACKSTRAP (FLAT OR ARCHED) THAT ALLOWS SHOOTERS	1.00	
☐	265	ASSIGN...		RUGER-SR9-0	HANDGUN; UNIQUE REVERSIBLE BACKSTRAP (FLAT OR ARCHED) THAT ALLOWS SHOOTERS	1.00	
☐	1026	ASSIGN...		RUGER-SR9-0	HANDGUN; UNIQUE REVERSIBLE BACKSTRAP (FLAT OR ARCHED) THAT ALLOWS SHOOTERS	5.00	
☐	757	WWW...		RUGER-SR9-0	HANDGUN; UNIQUE REVERSIBLE BACKSTRAP (FLAT OR ARCHED) THAT ALLOWS SHOOTERS	1.00	
☐	813	ASSIGN...		RUGER-SR45-0	HANDGUN; DOVETAILED, HIGH-VISIBILITY 3-	1.00	

Showing 66 records

Cancel

Back

Next

To transfer items:

1. Enter the transfer location in the **Transfer to Location** field, or search for the location using the chooser button to the right.
2. Choose the items needed for transfer. Choose one or multiple, or choose all by using the checkbox in the top-left corner.

Transfer to Location							
☐	No	Status	Justification	Item	Description	Quantity	Image
☒	1007	ASSIGN...		GLOCK-17-0	SPECIAL UNITS, SWAT, AND MILITARY UNITS	1.00	
☒	1008	ASSIGN...		GLOCK-17-0	HANDGUN; DESIGNED FOR PROFESSIONALS, THE GLOCK 17, IN 9X19, IS THE MOST	1.00	
☒	960	ASSIGN...		GLOCK-17-0	HANDGUN; DESIGNED FOR PROFESSIONALS, THE GLOCK 17, IN 9X19, IS THE MOST	1.00	
☐	406	ASSIGN...		GLOCK-17-0	HANDGUN; DESIGNED FOR PROFESSIONALS, THE GLOCK 17, IN 9X19, IS THE MOST	1.00	
☐	851	ASSIGN...		GLOCK-17-0	HANDGUN; DESIGNED FOR PROFESSIONALS, THE GLOCK 17, IN 9X19, IS THE MOST	1.00	
☒	957	ASSIGN...		CHMECHG-L-0	GLOVE; THE ARMA TUFF GLOVE PROVIDES MEDIUM IMPACT PROTECTION AND HIGH	1.00	

3. Enter a justification by clicking the notepad button in the Justification column.
4. Click **Next**.

Replacement

When replacing an item, this step opens to the list of assigned items.

Request Items Online

Use this form to request new or replacement items and to report problems.

- 1 WHO is this for?
- 2 REASON for request
- 3 CHOOSE your items
- 4 REVIEW and submit

(0) items in list

What items are you replacing?

Request New Item

ASSIGNED ALL

ASSIGNED

Date Expired
Quantity 1.00
RUGER-SR45-0
HANDGUN; DOVETAILED, HIGH-VISIBILITY 3-DOT SIGHT SYSTEM FEATURES A RAKED-FORWARD FRONT SIGHT FOR EASY REMOVAL FROM THE HOLSTER AN
Assignment No 669
Date Assigned 01/03/2017
Date Expected Return 01/22/2017

ASSIGNED

Date Expired
Quantity 1.00
RUGER-SR40-0
HANDGUN; INTEGRAL ACCESSORY MOUNTING RAIL PROVIDES SPACE FOR MOUNTING LIGHTS, LASERS AND OTHER TACTICAL ACCESSORIES.
Assignment No 976
Date Assigned 05/22/2017
Date Expected Return

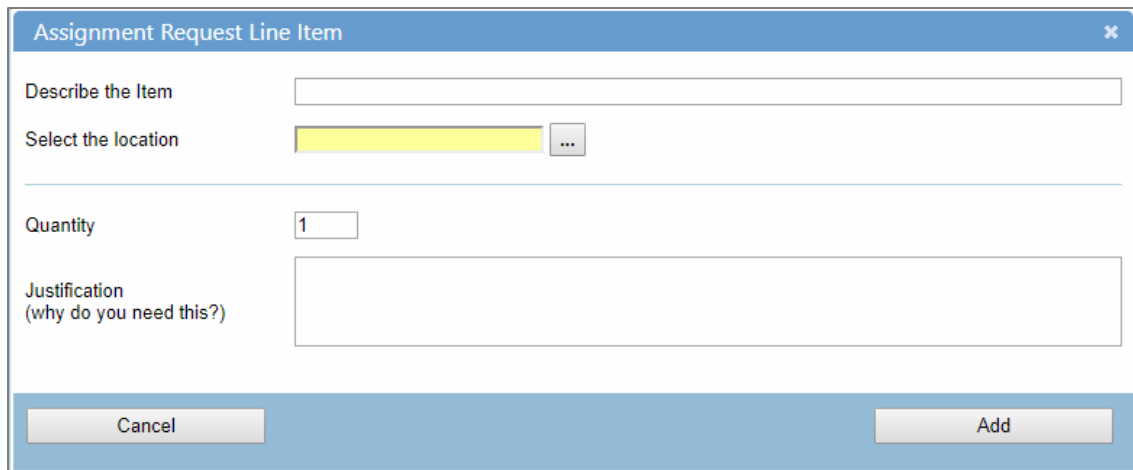
ASSIGNED

Date Expired
Quantity 1.00
RISE-M-0
BODY-ARMOR; RISE - A HIGHER LEVEL OF BODY ARMOR PROTECTION. REVOLUTIONARY CONCEALED SOFT BODY ARMOR PLATFORM.
Assignment No 975
Date Assigned 05/22/2017
Date Expected Return

To request a new item:

1. Click **Request New Item**. If the catalog option is turned on, refer to the [To use the Request Catalog button, or find a new item:](#) section above to use the catalog. Otherwise, continue below to choose your items.

The Assignment Request Line Item pop-in displays.



The image shows a dialog box titled "Assignment Request Line Item" with a close button (X) in the top right corner. The dialog contains four input fields: "Describe the Item" (a text box), "Select the location" (a dropdown menu with a yellow highlight and a button with three dots), "Quantity" (a text box containing the number "1"), and "Justification (why do you need this?)" (a larger text box). At the bottom of the dialog, there are two buttons: "Cancel" on the left and "Add" on the right.

2. Add a description of the item.
3. Select the location. This field displays all locations the current logged-on user has access to for allocation and assignment.
4. Update the quantity needed.
5. Enter a justification.
6. Click **Add** to add this to your list, or **Cancel** to cancel adding items.

4. Review and Submit

The Review and Submit page will show you a summary of line items on the request. It allows you to perform the following actions:

- **Remove items:** Click the **X** button on the right-side of a line item and click **Delete Selected** to remove that line item.

Request Items Online
Use this form to request new or replacement items and to report problems.

1 WHO is this for? ✓ **Please review your request and submit when ready.**
Reason for Request NEW ITEM

2 REASON for request ✓ Request For OPERATOR

3 CHOOSE your items ✓

4 REVIEW and submit

3 item(s) in list

Summary		Quantity	Justification	
ID	RUGER-SR9-0	1		X
Description	HANDGUN; UNIQUE REVERSIBLE BACKSTRAP (FLAT OR ARCHED) THAT ALLOWS S...			
Location	LOCATION 001			
ID	RISE-L-0	1		X
Description	BODY-ARMOR; RISE - A HIGHER LEVEL OF BODY ARMOR PROTECTION, REVOLUTI...			
Location	LOCATION 001			
ID	GLOCK-17-0	1		X
Description	HANDGUN; DESIGNED FOR PROFESSIONALS, THE GLOCK 17, IN 9X19, IS THE MO...			
Location	LOCATION 001			

Showing 3 records

Cancel Back Submit Request

- **Quantity:** Change the quantity requested if needed.
- **Justification:** Click the notepad button in the Justification column to view or edit the justification if needed.
- **Cancel:** Cancel request.
- **Back:** Returns to previous step.
- **Submit Request:** Submits the request.

If any errors occur, the details will be displayed to the user. After correcting these problems the user can try to re-submit the request.

With a successful submission, the pop-in displays the **Successful Update** message before returning to the front page with the pending requests in the list.

Assignment Requests

Assignment Request Portal

Request items or replacements or report problems online

Request Items or Report a Problem

Your assignment requests

PENDING
CANCELED
COMPLETED
ALL

Search:

	Notes	Request ID	Request Status	Approval Status	Request Reason	Item Description	Manufacturer	Model	Qty	Requested For	Assign to ID	Justification	Request Date
Cancel		511	PENDING		NEW ITEM	RISE-M-0			1.00	OPERATOR	ZSOP	NEEDED FOR BODY PROTECTION	07/12/2017 10:26
Cancel		510	PENDING		NEW ITEM	GLOCK-17-T-FX-0			1.00	OPERATOR	ZSOP	NEED FOR PROTECTION	07/12/2017 10:26
Cancel		509	PENDING		NEW ITEM	TSHIRT-0			3.00	OPERATOR	ZSOP		07/10/2017 12:11
Cancel		508	PENDING		TRANSFER	T-SHIRT-0			3.00	OPERATOR	ZSOP		07/10/2017 11:07
Cancel		507	PENDING		TRANSFER	TSHIRT-0			3.00	OPERATOR	ZSOP		07/10/2017 11:05
Cancel		506	PENDING		TRANSFER	RUGER-SR45-0			1.00	OPERATOR	ZSOP		07/10/2017 10:59
Cancel		505	PENDING		TRANSFER	TSHIRT-0			3.00	OPERATOR	ZSOP		07/10/2017 10:59
Cancel		504	PENDING		NEW ITEM	REMINGTON-M700-SPS-TAC-0			1.00	OPERATOR	ZSOP		07/10/2017 10:58
Cancel		492	PENDING		TRANSFER	ZSEQP-001			3.00	OPERATOR	ZSOP	TEST 11 - 2	06/21/2017 09:12
Cancel		491	PENDING		TRANSFER	TSHIRT-0			1.00	OPERATOR	ZSOP	TEST 11 - 1	06/21/2017 09:12