Inventory

- User’s handbook -

EPFL
Contents

1. Aim of the handbook........................................................................................................2
2. Equipment .....................................................................................................................2
3. Inventory process for equipment.....................................................................................2
4. Main Page .....................................................................................................................2
5. Create an inventory record............................................................................................4
   a. Introduction............................................................................................................4
   b. Create an inventory record with a purchase order .................................................4
   c. Create an inventory record without a purchase order ...........................................6
   d. The inventory record..............................................................................................6
   e. Main data...............................................................................................................7
   f. Additional data.......................................................................................................17
   g. Attached documents.............................................................................................20
   h. History ..................................................................................................................21
6. Search for an inventory record.......................................................................................22
   a. Introduction............................................................................................................22
   b. Search page...........................................................................................................22
   c. Modification of an inventory record .........................................................................27
      c. 1 Modify an inventory record ............................................................................27
      c. 2 Put equipment on the exchange platform .......................................................28
      c. 3 Transfer cost center equipment .......................................................................28
      c. 4 Remove equipment from the inventory ..........................................................29
7. Equipment to give or sell ............................................................................................31
   a. Introduction............................................................................................................31
   b. Using the exchange platform (“Equipment to give or sell”)..................................31
8. Control your inventory..................................................................................................33
   a. Introduction............................................................................................................33
   b. Inventory control....................................................................................................34
   c. Inventory control application ................................................................................40
9. Reporting Inventaire.....................................................................................................45
   a. Introduction............................................................................................................45
10. MyInbox.....................................................................................................................46
    a. Introduction..........................................................................................................46
    b. Performing a task..................................................................................................46
Annex 1: Inventory Process – Roles and Responsibilities .............................................50
1. **Aim of the handbook**

The aim of this handbook is to explain how to use the inventory application.

2. **Equipment**

Equipment refers to items which may be used repeatedly, for which the intended operating life is greater than one year and which must be entered in the inventory in accordance with the regulations laid out in the Directives concerning purchases and inventories.

3. **Inventory process for equipment**

4. **Main Page**

All functions may be accessed from the inventory application Main Page. These functions are displayed as tabs.
By clicking on “Create an inventory record”, you can create an inventory record for a piece of equipment. See Chapter 5

By clicking on “Search for an inventory record”, you can search for an item, consult its inventory record and, if you have the relevant authorisation, modify it. See Chapter 6

By clicking on “Equipment to give or sell”, you can indicate all equipment attached to your Unit which is still useful and operable and that you wish to make available to other EPFL Units. See Chapter 7

By clicking on “Control your inventory”, when you begin your annual inventory check, you will have access to the list of ‘equipment to be controlled’ for the Unit (or Units) for which you act as Inventory Coordinator (see Directives concerning purchases and inventories). See Chapter 8

By clicking on “Inventory Reporting” you can generate very detailed reports. See Chapter 9

By clicking on “MyInbox” you can check your tasks to be performed and complete them. See Chapter 10
5. Create an inventory record

a. Introduction

When you receive an item (or items) which must be entered in the inventory, log in to the inventory application via the SESAME portal.

Once you have arrived at the Main Page, click on the “Create an inventory record” tab, as shown in the screenshot below:

We remind you that it is mandatory to complete a purchase order for the acquisition of goods of all kinds; however, equipment may be entered in the inventory with or without a purchase order (see Chapter 5, paragraphs b – c).

b. Create an inventory record with a purchase order

When you receive equipment that must be entered in the inventory, log in to the inventory application via the SESAME portal.

From the Main Page, click on the “Create an inventory record” tab (see Chapter 5, paragraph a).

You can search for your order in two ways:

Option a:
Enter your purchase order number into the “Purchase order number” bar.

Example

| Purchase order number: | 3000622661 |
The application will display the corresponding order. Click on this order to open a new inventory record for creation.

Example

<table>
<thead>
<tr>
<th>Purchase order number</th>
<th>Purchase date</th>
<th>Supplier name</th>
<th>Order amount</th>
<th>Buyer name</th>
</tr>
</thead>
<tbody>
<tr>
<td>3000622661</td>
<td>26/07/2018</td>
<td>Dell SA</td>
<td>4'500.00 CHF</td>
<td>Bruno Riccini</td>
</tr>
</tbody>
</table>

**Option b:**
Enter the GASPAR username under which the order was placed in the “**Purchase order number**” bar.

Example

```
Purchase order number: riccini
```

The application will display the list of orders attached to the GASPAR username indicated. Select the order for which a new inventory record is to be created by clicking on it.

Example

```
<table>
<thead>
<tr>
<th>Purchase order number</th>
<th>Purchase date</th>
<th>Supplier name</th>
<th>Order amount</th>
<th>Buyer name</th>
</tr>
</thead>
<tbody>
<tr>
<td>3000622684</td>
<td>15/08/2018</td>
<td>Dell SA</td>
<td>24'000.00 CHF</td>
<td>Bruno Riccini</td>
</tr>
<tr>
<td>3000622663</td>
<td>09/08/2018</td>
<td>Dell SA</td>
<td>4'700.00 CHF</td>
<td>Bruno Riccini</td>
</tr>
<tr>
<td>3000622665</td>
<td>09/08/2018</td>
<td>Dell SA</td>
<td>5'000.00 CHF</td>
<td>Bruno Riccini</td>
</tr>
<tr>
<td>3000622664</td>
<td>09/08/2018</td>
<td>Dell SA</td>
<td>4'800.00 CHF</td>
<td>Bruno Riccini</td>
</tr>
</tbody>
</table>
```

Whether you have followed **option a** or **option b**, a window showing the items to be entered in the inventory will appear.
Click on the order item for which a new inventory record is to be created.

Example

<table>
<thead>
<tr>
<th>Item number</th>
<th>Description</th>
<th>Unit price</th>
<th>To inventory</th>
<th>Ordered quantity</th>
<th>Delivered quantity</th>
<th>Inventoried quantity</th>
</tr>
</thead>
<tbody>
<tr>
<td>00001</td>
<td>Test 1</td>
<td>12'000.00 CFA</td>
<td>Mandatory</td>
<td>1.000</td>
<td>0.000</td>
<td>0.000</td>
</tr>
<tr>
<td>00002</td>
<td>Test 2</td>
<td>12'000.00 CFA</td>
<td>Mandatory</td>
<td>1.000</td>
<td>0.000</td>
<td>0.000</td>
</tr>
</tbody>
</table>

The application will open a page for the creation of a new inventory record (see Chapter 5, paragraph e).

c. Create an inventory record without a purchase order

When you receive equipment that must be entered in the inventory, log in to the inventory application via the SESAME portal.

On the Main Page, click on the “Create an inventory record” tab (see Chapter 5, paragraph a).

Click “No purchase order applies”.

The application will open a page for the creation of a new inventory record (see Chapter 5, paragraph e).

d. The inventory record

An inventory record includes four types of data: Main data, Additional data, Attached documents and History:
e. Main data

The Main data are the most important information. Take care to enter this information correctly when creating a new inventory record.

Data fields marked * are mandatory and each inventory application user is required to verify their accuracy. Certain information that you provided when creating your purchase order will be automatically entered.

The system does not allow an inventory record to be stored if an item of Main data is missing.

The Main data includes 15 elements.

1. **Yellow barcode n°**: When creating an inventory record, please enter the number found on the yellow barcode sticker (stickers may be ordered from Service Desk 1234). Please note that once the inventory record has been created, the numbered sticker must be attached to the equipment concerned so that it may be easily identifiable.

Example
2. **Purchase order ID**: this section will only appear if you are creating an inventory record attached to a preselected purchase order, in which case the purchase order number will appear automatically.  
*(See Chapter 5, paragraph b)*

Example

![Purchase order ID: 300622660](image)

If you are creating an inventory record for an item of equipment *not attached to a Purchase order*, the “Purchase order ID” section will be replaced by a section entitled “Origin”.  
*(See Chapter 5, paragraph c).*

By clicking on the small arrow icon on the right, you may access a dropdown list of options. Please specify the origin of the equipment to be entered in the inventory by selecting the correct option before entering information.

Example

![Origin: Donation](image)
3. **Serial number**: enter the serial number of the equipment to be entered in the inventory. Please note that the serial number is a unique number assigned to an object in order to identify it. It will already be present on or inside an item upon delivery.

Example

![Serial number example](image)

4. **Class and Equipment category**: by clicking on the small icon ☰ to the right of the section labelled “Class”, you can access a list of categories. First, indicate the category to which the equipment to be entered in the inventory belongs. A new window with a list of classes (subsections of the category selected) will appear. Please indicate the class (object description allowing equipment to be separated into groups) to which the equipment to be entered in the inventory belongs, by clicking on the most suitable option.

Example

![Class and equipment category example](image)

Please ensure that you indicate the equipment category accurately. Once the inventory record is safeguarded, **you will no longer be able to modify** this category; only the class may be modified by selecting a different option from the list of classes shown under the previously indicated category. Please contact Support if you need to modify the class after the creation of the record.
6. **Manufacturer:** Please enter the name of the manufacturer of the equipment to be entered in the inventory. You can check whether or not the manufacturer is already present in the database by writing its name or the first letters. If the manufacturer already exists, the system will show you the available options. Please select the appropriate option.

Example

```
Manufacturer:

ACCUFIBER
Accuri
Accuri Cytometers (Europe) Ltd
Accuri Cytometers Ltd
```

If a manufacturer is not yet present in the database, please enter its name in the “Manufacturer” field. Once the inventory record has been safeguarded, the Manufacturer will be safeguarded in the database.

Please make sure to choose/write the correct company name when selecting/entering the name of the manufacturer so as to allow for optimal equipment management and information sharing.

For example: Siemens Suisse SA

7. **Equipment short text:** please clearly and accurately describe the equipment to be entered in the inventory, in order to allow all types of inventory application users to find/consult the item in the inventory.

Example

```
*Equipment short text: Vector signal analyser
```

Please avoid

```
*Equipment short text: NI PXIe-5668 14 GHz
```
8. **Status**: please note that when a new inventory record is created, the application will automatically set the status as **"In service"**. A drop-down list of options can be accessed by clicking on the small icon on the right. If necessary, click on the correct status of the equipment to change it.

Example

```
Status: In service

In service
In service but damaged
Out of order
Cannot be found
```

9. **10. Location type** and **Location**: there are two possibilities for indicating where the equipment is located.

**Option A1: Location type – Room.**
By selecting **"Room"** in the **"Location type"** section, you can enter a location within EPFL.

```
*Location type: Room
*Location: [enter location code]
```

Please enter the location code in the **"Location"** section. Based on the alphanumeric code that you enter, the system will provide you with a list of possible locations. **Please click on the appropriate location.**
Alternatively, you can also click on the small icon on the right of the “Location” section. Based on the alphanumeric code that you enter, the system will provide you with a list of possible locations. Please click on the appropriate location.

Example
If you so wish, by choosing Option A1 you can indicate the GPS coordinates for the equipment location by clicking on the "Add GPS coordinates" button:

![Add GPS coordinates button]

**Option A2: Location type - Address**
If you select “Address”, please enter the exact address where the equipment can be found outside of EPFL.

![Location type selection]

**11. In-service date:** Please indicate the date on which the equipment was/will be put in service, in the format requested by the application.

You can also open a window with a calendar from which you can select the in-service date.

Example:

![In-service date selection]

Please note that the selection of an in-service date for equipment implies that the operational, quantitative and qualitative assessment for the item to be entered in the inventory has already been validated.
12. **Owner**: please click on the small arrow icon on the right of the section headed “Owner”. A window with the possible options will appear. Please select the owner of the equipment to be entered in the inventory by clicking on the appropriate option.

![Owner selection screenshot]

Please note that the “Private” option concerns all computers owned by EPFL employees and used for educational or research purpose which the owner wishes to enter in the inventory, after the VPO authorisation; the “External organization” option concerns all items, which have been loaned or rented, in accordance with the regulations, laid out in the Directive on Inventories.

13. **Cost center**: please note that the application will only display the cost centers for which you are authorised to create inventory records.

If you are authorised to create inventory records for multiple cost centers, you can click on the small icon on the right to open a window with the cost centers available to you.

Please select the cost center responsible for managing the equipment to be entered in the inventory.

**Example**

![Cost center selection screenshot]

14. **Price**: please enter the price of the equipment. The price corresponds to the amount shown on the purchase order including VAT, respectively to the amount invoiced, if different. All discounts, installation fees and (where applicable) shipping or customs fees, must be incorporated.

**Example**

![Price entry screenshot]

Please note that the equipment price must be indicated in Swiss francs (CHF). If the invoice shows a different currency, we request that you use the exchange rate published on the website [https://sf.epfl.ch/tauxdechange](https://sf.epfl.ch/tauxdechange) to calculate the amount in CHF, taking into consideration the date of the invoice.
15. **Picture**: if you so wish, you may attach a photograph of the equipment to be entered in the inventory. In this case, please click on the “Browse…” button and select the photograph you wish to attach.

To complete the creation of an inventory record process, click the “Save” button on the bottom right of the window once all of the main data are entered.

**Example**

```
Main data

*Yellow barcode n*: B999999
*Purchase order ID*: 3000622744
*Serial number*: 987654321
*Class*: Signal analysis

Equipment category: Scientific equipment
*Manufacturer*: Accuri Cytometers (Europe) Ltd
*Equipment short text*: Vector signal analyzer

*Status*: In service
*Location type*: Room
*Location*: B1 A1 486
*In-service date*: 15.10.2018
*owner*: EPFL
*Cost center*: Comptabilité
*Price*: 20’000.00 CHF

Picture: Select a document

Save
```
The application will display the inventory record you have created.

**Example with a purchase order**

<table>
<thead>
<tr>
<th>MAIN DATA</th>
<th>ADDITIONAL DATA</th>
<th>ATTACHED DOCUMENTS</th>
<th>HISTORY</th>
</tr>
</thead>
<tbody>
<tr>
<td>Equipment number:</td>
<td>25000057</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Yellow barcode n°:</td>
<td>B202903</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Purchase order ID:</td>
<td>3000623066</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Serial number:</td>
<td>3417150016</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Class:</td>
<td>Stereo microscopes</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Equipment category:</td>
<td>Scientifical equipment</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Manufacturer:</td>
<td>LEICA MICROSYSTEMS AG</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Equipment name:</td>
<td>Leica Stereozoom S9i &amp; access</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Status:</td>
<td>In service</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Control status:</td>
<td>Uncontrolled</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Location:</td>
<td>AI 1125</td>
<td></td>
<td></td>
</tr>
<tr>
<td>In-service date:</td>
<td>04.09.2017</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Owner:</td>
<td>EPFL</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Cost center:</td>
<td>C1350</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Price:</td>
<td>CHF 4'908.97</td>
<td></td>
<td></td>
</tr>
</tbody>
</table>

**Example without a purchase order**

<table>
<thead>
<tr>
<th>MAIN DATA</th>
<th>ADDITIONAL DATA</th>
<th>ATTACHED DOCUMENTS</th>
<th>HISTORY</th>
</tr>
</thead>
<tbody>
<tr>
<td>Equipment number:</td>
<td>25000015</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Yellow barcode n°:</td>
<td>B203013</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Origin:</td>
<td>Obtained without a PO</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Serial number:</td>
<td>3842011160</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Class:</td>
<td>Optical microscopes</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Equipment category:</td>
<td>Scientifical equipment</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Manufacturer:</td>
<td>CARL ZEISS AG</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Equipment name:</td>
<td>Invert Microscope Primover</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Status:</td>
<td>In service</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Control status:</td>
<td>Uncontrolled</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Location:</td>
<td>AI 1217</td>
<td></td>
<td></td>
</tr>
<tr>
<td>In-service date:</td>
<td>17.10.2018</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Owner:</td>
<td>EPFL</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Cost center:</td>
<td>C1305</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Price:</td>
<td>CHF 4'586.02</td>
<td></td>
<td></td>
</tr>
</tbody>
</table>
f. Additional data

Additional data refers to information which is not mandatory, but which may be very useful to all users.

The Additional data comprises 9 elements.

1. Confidential: please note that when creating a new inventory record, the application will automatically set the answer to “NO” in order to allow all EPFL employees to search for an item of equipment in the inventory database.
   If you wish to change the confidentiality status, click on this icon:

   ![Confidential Status Icon]

   Please think carefully before setting your equipment to confidential. If in doubt, contact the inventory support service by email: sf.inventaire@epfl.ch.
2. **User:** you can search for the contact person responsible for the use of the item of equipment. You can search for the name in the list of EPFL employees by inserting either the user’s surname or their SCIPER number. Click on the name of the person you wish to enter as the user.

Example

<table>
<thead>
<tr>
<th>Name</th>
<th>SCIPER</th>
<th>Jenikov Justiniano</th>
<th>181538</th>
</tr>
</thead>
<tbody>
<tr>
<td>Jeniffer Miehlbradt</td>
<td>179424</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Jeniffer Lima Graf</td>
<td>275084</td>
<td></td>
<td></td>
</tr>
</tbody>
</table>

3. **Warranty end date:** you can indicate the end date of the warranty for your equipment. A calendar can also be displayed, from which you can select the warranty end date.

Example

Warranty End date: **dd.MM.yyyy**
4. **Model:** you can add the model to the equipment name entered in the “**Equipment short text**” section of the Main data.

Example

```
*Equipment short text: Vector signal analyser
```

- **Model:** KEYSIGHT AGILENT HP 89441A

5. **Generic field:** here you can add further information that you have not yet entered.

6. **Acceptance test:** please note that when creating a new inventory record, the application will automatically select “NO”. You may modify the acceptance test status by clicking on the icon.

Example

```
Acceptance Test: NO
```

7. **Equipment tested by:** you can enter the name of the person who completed the acceptance test. You can search for this person in the list of EPFL employees by inserting either their name or their SCIPER number.

Example

- **Equipment tested by:**

<table>
<thead>
<tr>
<th>Ana Catarina Fernandes Mendonça</th>
<th>232622</th>
</tr>
</thead>
<tbody>
<tr>
<td>Ana Catarina Henriques</td>
<td>206807</td>
</tr>
<tr>
<td>Ana Catarina Rodrigues Alves</td>
<td>264139</td>
</tr>
<tr>
<td>Ana Catarina Henrique</td>
<td>206807</td>
</tr>
</tbody>
</table>
8. **Technical characteristics**: you may enter all of the information necessary for explaining the technical characteristics of the equipment.

   Please note that this section is highly useful for those searching for an item of equipment with specific technical characteristics.

9. **Total lifetime (years)**: this section is reserved for the Heads of School Infrastructures. It allows you to indicate the estimated total operating life of your equipment. Please note that equipment is defined as items which can be used repeatedly and for which the intended operating life is greater than one year, taking into account normal or average wear rate. For this reason, the system will only accept values of **1 or over**.

g. **Attached documents**

   **Attached documents** represent details which are not mandatory, but which may provide users with highly useful information regarding the equipment entered in the inventory.

   The main information is comprised of two elements.

   1. **Attachments**: if you would like to attach the documents you consider useful, please click on the small **+** icon and add the desired files.
2. **Invoices**: the system will automatically display the invoices relating to the purchase order concerned for consultation.

<table>
<thead>
<tr>
<th>Invoices</th>
<th>2</th>
</tr>
</thead>
<tbody>
<tr>
<td><img src="image" alt="No file present" /></td>
<td></td>
</tr>
</tbody>
</table>

**h. History**

**History**: provides a journal of all modifications made to the inventory record since its creation. This section will appear for consultation only.

Example

<table>
<thead>
<tr>
<th>Date</th>
<th>User</th>
<th>contact email</th>
<th>Detailed description</th>
</tr>
</thead>
<tbody>
<tr>
<td>27.11.2018</td>
<td>278405</td>
<td><a href="mailto:emmanuelle.policari@epfl.ch">emmanuelle.policari@epfl.ch</a></td>
<td>Création équipement</td>
</tr>
<tr>
<td>29.11.2018</td>
<td>278405</td>
<td><a href="mailto:emmanuelle.policari@epfl.ch">emmanuelle.policari@epfl.ch</a></td>
<td>Modification équipement</td>
</tr>
<tr>
<td>29.11.2018</td>
<td>278405</td>
<td><a href="mailto:emmanuelle.policari@epfl.ch">emmanuelle.policari@epfl.ch</a></td>
<td>Modification équipement</td>
</tr>
</tbody>
</table>
6. Search for an inventory record

a. Introduction

If you would like to look for an item of equipment which is in the inventory and consult or modify its inventory record, log in to the inventory application.

When you arrive at the Main Page, click on the “Search for an inventory record” tab.

![Search for an inventory record tab in EPFL application](image)

b. Search page

Once you have selected the search tab, the application will open a list of equipment entered in the EPFL inventory.

Example

![Inventory document example](image)
The search page is divided into two parts: the search section and the results section.

**Search section:** the search section allows you to use various filters to find the inventory record that you would like to consult or modify.

Example

<table>
<thead>
<tr>
<th>Description</th>
<th>Inventory number</th>
<th>Yellow barcode n°</th>
<th>Serial number</th>
<th>Status</th>
<th>Location</th>
<th>Cost center</th>
<th>Generic Field 1</th>
<th>Generic Field 2</th>
<th>Generic Field 3</th>
</tr>
</thead>
<tbody>
<tr>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
</tbody>
</table>

**Results section:** the results section is the list of results produced from the information entered in the search section, taking into account the filters used.

Example

<table>
<thead>
<tr>
<th>Inventory documents (11/21)</th>
</tr>
</thead>
<tbody>
<tr>
<td>Description</td>
</tr>
<tr>
<td></td>
</tr>
</tbody>
</table>

You can export your search results in Excel format by clicking on this small icon:

To customise your search section, click on this small icon:

Example
With the side scrollbar, you can view all of the filters available.

To customise your search section, tick the filters that you wish to use for your inventory record search.

You can apply more than one filter at a time, as required.

You can also enter the name of the filter in the search bar to find it more easily.

Example
Once you have selected the filters you would like to apply to your search, click the “OK” button. The search page will open with your selected filters displayed in the search section.

Example

Please note that the filters available generally correspond to the main and additional data that make up the inventory record. See Chapter 5, paragraphs b and c, for information on how to use them.
To find an inventory record for consultation or modification, you can enter one or several details regarding the equipment in question in the filter bars on the search page, then press Enter.

Example

You can download an inventory record as a PDF file by clicking on the icon on the top right of the page.
c. Modification of an inventory record

If you wish to modify the inventory record for an item of equipment, the application will allow you to complete various actions which are accessible via the menu at the top right of the inventory record.

Example

![Inventory Record Image]

**c. 1 Modify an inventory record**

**Modify:** by clicking the “*Modify*” button on the top right of the page, you can open an inventory record and modify it. Please remember that in order to safeguard the modification, you must click on the “*Enregistrer*” button.

Example

**Before**

![Before Image]

**After**

![After Image]
By clicking on the small icon on the top right , you can access further actions.

c. 2  Put equipment on the exchange platform

If you have the relevant authorisation, you can notify all EPFL Units that your Unit would like to give or exchange an item of equipment by clicking on the “Put on the exchange platform” button. To confirm your action, click “OK”.

![Put on the exchange platform button with confirmation dialog]


c. 3  Transfer cost center equipment

If you have the relevant authorisation, you can transfer equipment by reassigning the item to another Unit, specifying the reason for the transfer, and clicking the button:

![Transfer button with transfer request dialog]

Enter the new cost center responsible for the equipment and click the “Transfer” button.

Please note that for a cost center transfer of equipment to be successful, multiple validation is required via the “MyInbox” tab (see Chapter 9), notably from the following:
- The Head of the transferring Unit
- The Head of Infrastructure from the transferring School
- The Head of the receiving Unit
c. 4  Remove equipment from the inventory

When an item of equipment is no longer of use, if you have the relevant authorisation, you may request its removal from your Unit’s inventory.

If the removal concerns an item of computing equipment, please click the “Transfer to CRI” button shown below; the CRI (Computer Repair Centre) is the sole Unit authorised to write off computing equipment from EPFL’s assets.

![Transfer to CRI button]

For all other equipment, please click the “Inventory write-off” button shown below to begin the process of removing equipment from the inventory.

![Inventory write-off button]

When you click on the bar with the drop down menu, the application will ask you to select the reason for which you wish to remove the equipment from the inventory. Please specify the reason by selecting the appropriate option, attach a supporting document (if necessary) and confirm your action by clicking on “Confirm the write-off”.

Example

<table>
<thead>
<tr>
<th>Option</th>
<th></th>
</tr>
</thead>
<tbody>
<tr>
<td>scrapping</td>
<td></td>
</tr>
<tr>
<td>sale</td>
<td></td>
</tr>
<tr>
<td>loss</td>
<td></td>
</tr>
<tr>
<td>robbery</td>
<td></td>
</tr>
<tr>
<td>supplier recovery</td>
<td></td>
</tr>
<tr>
<td>donation</td>
<td></td>
</tr>
<tr>
<td>scrapping</td>
<td></td>
</tr>
<tr>
<td>private good</td>
<td></td>
</tr>
<tr>
<td>Inventory not mandatory</td>
<td></td>
</tr>
</tbody>
</table>
The application will update the “**Status**” section of the inventory record concerned.

Please note that the write-off of equipment from EPFL’s assets is subject to validation from the following:

- Head of the Unit concerned
- Head of Infrastructures\(^1\) for the School concerned (non IT equipment)
- Head of ECO and EPFL Inventory Coordinator (equipment with a value equal to or exceeding CHF 50,000).

Please note that the **removal** of equipment from the inventory **must always be performed in accordance with the regulations** laid out by the VPF (see EPFL Directive on Inventories)

\(^1\) Or any other person appointed by other level 2 Units.
7. Equipment to give or sell

a. Introduction

If your unit wishes to exchange or donate an item of equipment entered in the inventory to another EPFL team, or if you are looking for an item of equipment made available to other Units, you can do so using the exchange platform in the inventory application.

b. Using the exchange platform (“Equipment to give or sell”)

Once at the Main Page, select the “Equipment to give or sell” tab.

The application will open a window containing a summary of all items of equipment available on the exchange platform.

Example
You can search for an item of equipment using the search bar:

If you select an item of equipment shown in the column on the left of the window, the application will display the main data for that item on the right. To view the inventory record for the item of equipment selected, click on the “Display equipment sheet” link.

Example

If your Unit wishes to submit an item of equipment to the exchange platform, please refer to Chapter 6, paragraph c.

If you have the relevant authorisation, you can remove an item of equipment previously made available from the exchange platform by clicking the “Remove from the exchange platform” button and confirming your action.

The item will be returned to your Unit’s inventory.
8. Control your inventory

a. Introduction

Every year, EPFL controls the equipment inventories for each Unit. This involves confirming the existence of the equipment and the accuracy of the data recorded in the inventory, in accordance with the regulations laid out by the VPF (see EPFL Directive on Inventories).

Each Unit is required to control, modify (if necessary) and validate its inventory once per year. The EPFL Inventory Coordinator will communicate the schedule for the control in conjunction with the Heads of Infrastructure for the Schools, or all other persons appointed by other level 2 Units.

Please note that regularly updating data allows for improved cost sharing and for all EPFL employees to search for equipment. Only items of equipment which have not been controlled in the past year are subject to the annual control.

Please also note that ECO will not award a Unit with funding for investment if that Unit has not successfully carried out its annual inventory control.

In order to complete the inventory control for your Unit, log in to the inventory application. Once you arrive at the Main Page, if you have the relevant authorisation, click on the “Control your inventory” tab.
b. Inventory control

Once you have clicked on the “Control your inventory” tab, the application will open your inventory made up of all of the equipment assigned to your Unit and each item’s control status.

Example

By clicking on the equipment control status filter, you can choose to view all of the items of equipment assigned to your Unit, or only those which are still to be controlled or those which have already been controlled.

Example

If you are responsible for controlling the inventories of several Units, you can choose to view the inventory for each specific cost center.

Example

You can also enter any information you like into the empty box to customise your search.
Example

If you so wish, you can export your search results in Excel format by clicking on the small icon below:

If you would like to modify the inventory record for an item of equipment in order to update one or more details before approving the control, click on the item concerned.

Example
To approve the equipment control, click on the “Validate the control” button. The application will ask you to confirm your action.

Example

Every year all equipment must be checked at unit level. Please check each item on the list and make the necessary changes.

Ensuring the data is still up-to-date enables researchers to locate an equipment efficiently and enables as well a better equipment renewal planning.

<table>
<thead>
<tr>
<th>Total number of equipment (120)</th>
<th></th>
<th></th>
<th>Laptop</th>
</tr>
</thead>
<tbody>
<tr>
<td>Description</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Yellow barcode n°</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Class</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Status</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Location</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Scanned location</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Unit</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Cost center</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Scanned cost center</td>
<td></td>
<td></td>
<td></td>
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</tbody>
</table>

<table>
<thead>
<tr>
<th>Laptop</th>
<th></th>
<th></th>
<th></th>
</tr>
</thead>
<tbody>
<tr>
<td>88888888</td>
<td>In service</td>
<td></td>
<td></td>
</tr>
<tr>
<td></td>
<td>BI A1 647</td>
<td></td>
<td></td>
</tr>
<tr>
<td></td>
<td>BI A1 647</td>
<td></td>
<td></td>
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<tr>
<td></td>
<td>COMPTRA</td>
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<td></td>
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<tr>
<td></td>
<td>CD052</td>
<td></td>
<td></td>
</tr>
</tbody>
</table>

[2] Confirm

Are you sure you want to change the status of control of this equipment?

OK  Cancel

Once the control of the item has been approved, the status of control will change.

Example

Every year all equipment must be checked at unit level. Please check each item on the list and make the necessary changes.

Ensuring the data is still up-to-date enables researchers to locate an equipment efficiently and enables as well a better equipment renewal planning.

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</tr>
<tr>
<td></td>
<td>CD052</td>
<td></td>
<td></td>
</tr>
</tbody>
</table>

Validation

Please note that in case of a mistake, the status of control can be corrected by clicking on the “Validated” button and confirming the change of status for the relevant equipment control.
You may approve several items of equipment at the same time. First, tick all of the items that you would like to control and then click the "Action" button, followed by the "Validate control" button.

The application will ask you to confirm your selection.

Example

Once the equipment control has been approved, the status of control will be updated.

Example
You can use the same procedure to modify the location of several items of equipment at the same time, by clicking on "Modify location", then selecting a new location and confirming your choice.

Example

The application contains an option for approving the control of all equipment assigned to your Unit at the same time. To do so, tick the small box on the top left labelled “Description”.

The application will select all of the equipment displayed on the first page of the inventory. Once all of the equipment has been selected, follow the procedure explained above to approve the inventory control.

Whether you have completed the inventory control for your Unit by approving the items of equipment individually, in groups, or all together, once the inventory control is finished, the application will display all of the items in the inventory with the status “Validated”.
Example

Please contact the EPFL Inventory Coordinator at the following address (sf.inventaire@epfl.ch), as soon as possible if you observe that:

- Your Unit is using an item of equipment bearing a yellow barcode sticker (see Chapter 5) but this equipment does not appear in your inventory;

- Your Unit is using an item of equipment which should have been entered in the inventory in accordance with the VPF rules, but which does not bear an yellow barcode sticker (see Chapter 5), has a value of CHF 50,000 or above and does not appear in your inventory.

Please note that the approval of a Unit’s inventory control is subject to a number of **mandatory prior conditions**:

- It has been checked that each item of equipment assigned to the Unit which appears in the inventory has been correctly entered;

- All inventory records for equipment entered in the inventory have been checked and all necessary modifications have been made;

- All measures such as transferral to a cost center, submission to the exchange platform and removal from the inventory have been carried out where necessary.
c. **Inventory control application**

If you want, you can use an application for smartphone (iOS or Android) to:

- Identify the equipment registered in your unit and which was physically found
- Identify the gap between the theoretical rooms and the actual ones

1. Please, make sure that you are connected to the EPFL wifi « epfl »

2. Please, install the application « SAP Fiori Client », by using the Apple App Store de Apple or Google Play

3. Open the application and click on « Se connecter »

4. Enter the url here below

**URL :**

5. **Click on « Désactiver code d’accès »**

6. **Login**

Log-in with your usual user name and your password

**How can use the app:**

1- Open the TAB « Scanner équipements »
2- Choose the cost center and room in question

3- Start the scan

Click on the red icon

4- Please, scan the yellow sticker

(During first use, the application will ask you to be able to access the camera. You must accept this request)
5- The scanned item appears:

The scanned equipment appear step by step

6- Please, scan the other items

Click on if you want scan other items

7- Submit your result

Once you finished your control, click on « Soumettre »
8- On your computer, view the results on the inventory control TAB

Open the Sesame portal in your computer. Go to the inventory control TAB

The "Local according to scan" and « Scanner cost center » columns respectively indicate the premises and the cost centers obtained with the scanning application.

Remarks :

-If you want to delete the scanned data, please to go the scan app and click on :

Scan data will be deleted only for the selected cost center (scan data saved for equipment allocated to other cost centers will not be deleted).
9. Reporting Inventaire

a. Introduction

Selon les droits dont vous disposez, sur votre page d’accueil vous aurez une tuile dénommée « Reporting Inventaire ». Cette tuile vous permet de générer des rapports très détaillés concernant la base de données de toute l’Ecole.

Exemple

Veuillez noter que cet outil est très performant et permet de customiser différents types de rapports. Toutefois, à moins de devoir générer des rapports particuliers pour une ou plusieurs unités, pour une simple analyse vous pouvez utiliser la fonction d'extraction en format Excel décrite au Chapitre 6.b.

En cas de besoin veuillez contacter sf.inventaire@epfl.ch
10. MyInbox

a. Introduction

Depending on your level of authorisation, you may have a “MyInbox” tab on your Main Page. This tab enables you to see how many and which actions you have to complete.

Example

![MyInbox example]

Please note that the number of tasks shown on the Main Page does not only concern the inventory of equipment, but also all actions to be performed on the inventory application.

b. Performing a task

Once you have clicked on the “MyInbox” tab, the application will open a window containing a summary of the tasks to be completed.

Example

![Task example]
You can search for a specific task or a sort of task to be completed by using the search bar. Example

![Pending tasks (1)](image)

When you click on a task from the column on the left, the application will display the main information regarding this task on the right. Example

![Inventory Write-off](image)

By clicking the paperclip icon, you can view any attached documents:

![Document icon](image)

By clicking the speech bubble icon, you can add a comment to your action:

![Comment icon](image)

By clicking the clock icon, you can view the steps of the procedure that you are carrying out:

![Clock icon](image)
Depending on your level of authorisation, once you have chosen a task to perform, you must accept or refuse the action suggested by clicking the appropriate button on the bottom right.

If you wish to accept the action, click “Accept”:

The application will ask you to confirm your choice by clicking on the “Submit” button. The application allows you to add a comment to your action, if you wish to do so.

Once your decision has been confirmed, the status of your task will change.

Example
If you wish to refuse the action suggested, click “Reject”:

The application will ask you to confirm your choice by clicking “Submit”.
The application will also ask you to enter a comment regarding your decision.

Once you have confirmed your decision, the status of your task will change.

Example
Annex 1: Inventory Process – Roles and Responsibilities

Inventory Management Process - Roles and responsibilities

<table>
<thead>
<tr>
<th>Phase</th>
<th>Collaborator</th>
<th>Unit Inventory Coordinator</th>
<th>Head of Unit</th>
<th>Faculty Infrastructures Coordinator*</th>
</tr>
</thead>
<tbody>
<tr>
<td></td>
<td>Purchase of equipment</td>
<td>Reception of goods</td>
<td></td>
<td></td>
</tr>
<tr>
<td></td>
<td>Modification of inventory record</td>
<td>Entry in the inventory</td>
<td>Annual inventory check</td>
<td></td>
</tr>
<tr>
<td></td>
<td></td>
<td></td>
<td>Validation of the annual inventory check</td>
<td></td>
</tr>
</tbody>
</table>

Removal from the inventory (excluding IT equipment) – Roles and responsibilities

<table>
<thead>
<tr>
<th>Phase</th>
<th>Unit Inventory Coordinator</th>
<th>Head of Unit</th>
<th>Faculty Infrastructures Coordinator*</th>
</tr>
</thead>
<tbody>
<tr>
<td></td>
<td>Request of removal from the inventory</td>
<td>1st Validation</td>
<td>2nd Validation**</td>
</tr>
<tr>
<td></td>
<td>Execution of removal from the inventory</td>
<td></td>
<td></td>
</tr>
</tbody>
</table>

* Or any other person appointed by other level 2 Units

** All validations of the removal from the inventory with an acquisition value equal to or exceeding CHF 50’000 must first be approved by the Head of the ECO Unit
Removal from the inventory (IT equipment) – Roles and responsibilities

Removal from the inventory – IT equipment

<table>
<thead>
<tr>
<th>Phase</th>
<th>Action</th>
</tr>
</thead>
<tbody>
<tr>
<td></td>
<td>Request of removal from the inventory</td>
</tr>
<tr>
<td>1st Validation</td>
<td></td>
</tr>
<tr>
<td>Execution of removal from the inventory</td>
<td></td>
</tr>
</tbody>
</table>

Equipment transfer – Roles and responsibilities

Equipment transfer between units

<table>
<thead>
<tr>
<th>Phase</th>
<th>Action</th>
</tr>
</thead>
<tbody>
<tr>
<td></td>
<td>Request of equipment transfer</td>
</tr>
<tr>
<td>1st Validation</td>
<td></td>
</tr>
<tr>
<td>2nd Validation</td>
<td></td>
</tr>
<tr>
<td>3rd Validation</td>
<td></td>
</tr>
</tbody>
</table>

* Or any other person appointed by other level 2 Units
For assistance, please contact

1234@epfl.ch (ServiceDesk)

or

sf.inventaire@epfl.ch

End of document