

Inventory

- User's handbook -



EPFL

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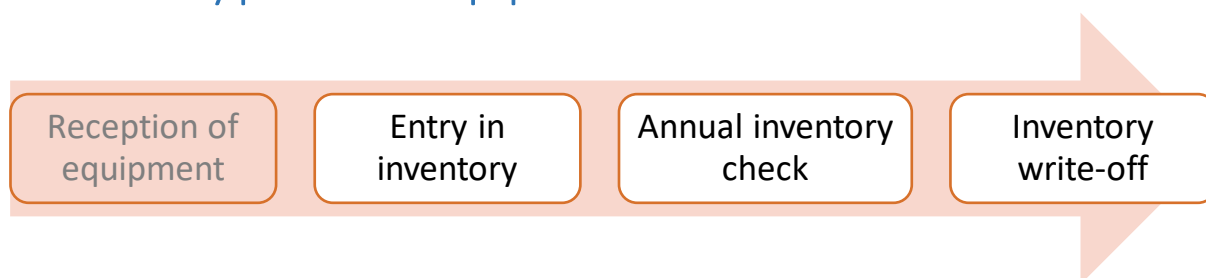
1. Aim of the handbook

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

2. Equipment

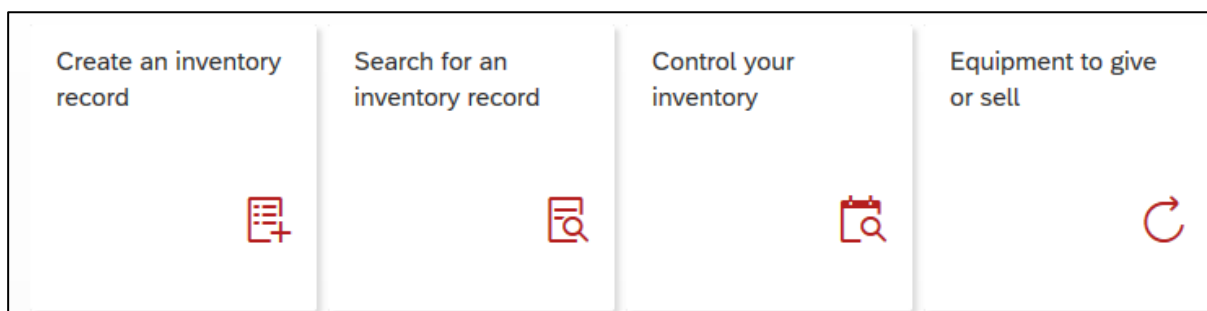
Equipment refers to items which may be used repeatedly, for which the intended operating life is greater than one year and which must be entered in the inventory in accordance with the regulations laid out in the Directives concerning purchases and inventories.

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*

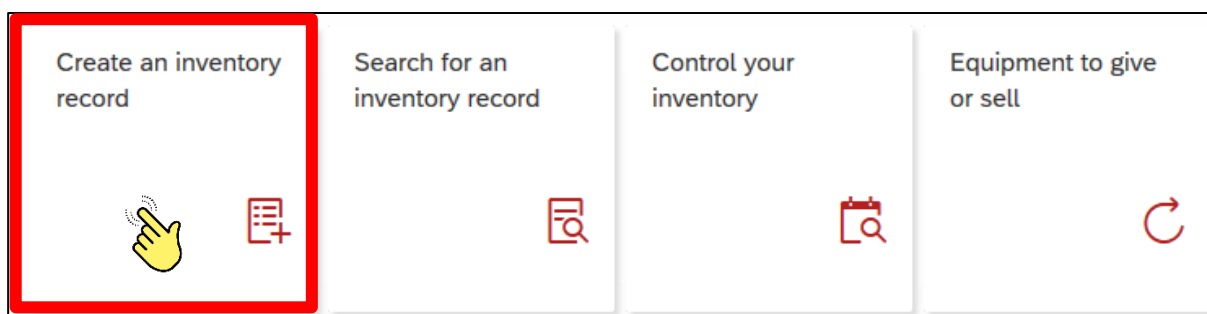


5. Create an inventory record

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:	<input type="text" value="3000622661"/>	<input type="button" value="X"/>	<input type="button" value="Q"/>
------------------------	---	----------------------------------	----------------------------------

The application will display the corresponding order. Click on this order to open a new inventory record for creation.

Example

1 Search results				
Purchase order number	Purchase date	Supplier name	Order amount	Buyer name
3000622661	26/07/2018	Dell SA	4'500.00 CHF	Bruno Riccini



Option b:

Enter the GASPARE username under which the order was placed in the ***“Purchase order number”*** bar.

Example


Purchase order number:
⊗
🔍

The application will display the list of orders attached to the GASPARE username indicated.

Select the order for which a new inventory record is to be created by clicking on it.

Example

9 Search results				
Purchase order number	Purchase date	Supplier name	Order amount	Buyer name
3000622684	15/08/2018	Dell SA	24'000.00 CHF	Bruno Riccini >
3000622663	09/08/2018	Dell SA	4'700.00 CHF	Bruno Riccini
3000622665	09/08/2018	Dell SA	5'000.00 CHF	Bruno Riccini >
3000622664	09/08/2018	Dell SA	4'800.00 CHF	Bruno Riccini >



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

Purchase order number 3000622684						
Purchase date: 15/08/2018 Supplier: Dell SA Ordered by: Bruno Riccini						
2 remaining item(s) to inventory out of 2 total item(s) <i>If you have any questions, please contact the Service Desk.</i>						
Item number	Description	Unit price	To inventory	Ordered quantity	Delivered quantity	Inventoried quantity
00001	Test 1	12'000.00 CHF	Mandatory	1.000	0.000	0.000
00002	Test 2	12'000.00 CHF	Mandatory	1.000	0.000	0.000

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**”.

Purchase order number:

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**:

MAIN DATA
ADDITIONAL DATA
ATTACHED DOCUMENTS
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°:

2 *Purchase order ID: 3000622750

3 *Serial number:

4 *Class:

5 Equipment category: Scientific equipment

6 *Manufacturer:

7 *Equipment short text: Vector signal analyzer

8 *Status: In service

9 *Location type: ☒ Room ☐ Address

10 *Location: Add GPS coordinates

11 *In-service date: dd/MM/yyyy

12 *owner: EPFL

13 *Cost center: Comptabilité

14 *Price: 25'000.00 CHF

15 Picture: Select a document Browse...

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:	3000622660
---------------------	------------

If you are creating an inventory record for an item **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

The diagram illustrates the process of selecting an origin for an inventory record. It starts with a form field labeled "*Origin:" with a dropdown arrow on the right. A yellow hand icon points to this arrow. A red arrow points down to a dropdown menu. The menu lists several options: "Obtained without a PO", "Donation", "Private equipment", "Organization takeover", "Internal construction", "In-built software", and "Loaned or rented to EPFL". A yellow hand icon points to the "Donation" option. Another red arrow points down to the final form field, which now displays "Donation" as the selected origin.

*Origin:	
----------	--

↓

Obtained without a PO

Donation

Private equipment

Organization takeover

Internal construction

In-built software

Loaned or rented to EPFL


↓

*Origin:	Donation
----------	----------

- 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

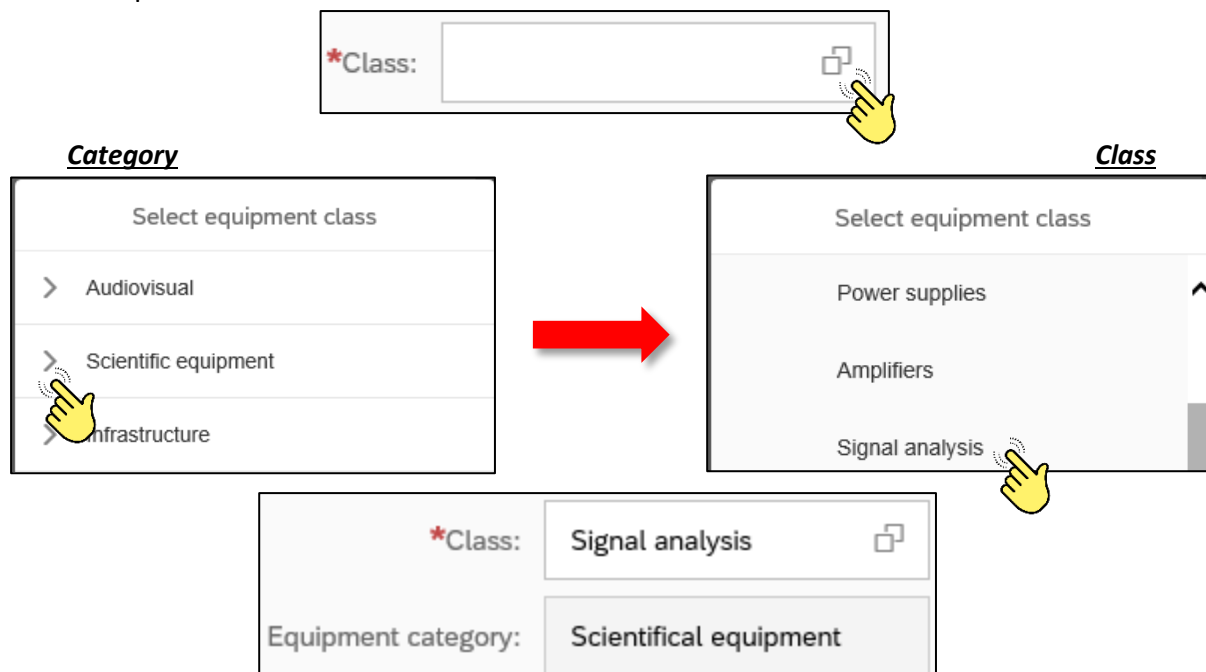


- 4. + 5. Class and Equipment category:** by clicking on the small icon  to the right of the section labelled “**Class**”, you can access a list of **categories**.

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



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

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

Please avoid

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

The diagram illustrates the process of changing the status of equipment. It starts with a form where the status is set to "In service". A hand icon clicks the dropdown arrow. This opens a list of options: "In service", "In service but damaged", "Out of order", and "Cannot be found". A hand icon selects "Out of order". The final state shows the status changed to "Out of order".

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.

The form shows the "Location type" section with two radio buttons: "Room" (selected) and "Address". Below this is a text input field for "Location:" with a small icon to its right. To the right of the input field is a button labeled "Add GPS coordinates". A red arrow points to the "Room" radio button.

Please enter the location code in the **"Location"** section.

Based on the alphanumeric code that you enter, the system will provide you will a list of possible locations. Please click on the appropriate location.

Example

BI A1 48		Add GPS coordinates
BI A1 483	BUREAUX	
BI A1 484	BUREAUX	
BI A1 485	BUREAUX	
BI A1 486	LOCAUX DE BUREAUTIQUE	

*Location:	BI A1 486	
------------	-----------	--

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 will a list of possible locations. Please click on the appropriate location.

Example

*Location:	<input type="text"/>	
------------	----------------------	--

Select location

BI A1 48		
BI A1 483 BUREAUX		
BI A1 484 BUREAUX		
BI A1 485 BUREAUX		
BI A1 486 LOCAUX DE BUREAUTIQUE		

*Location:	BI A1 486	
------------	-----------	--

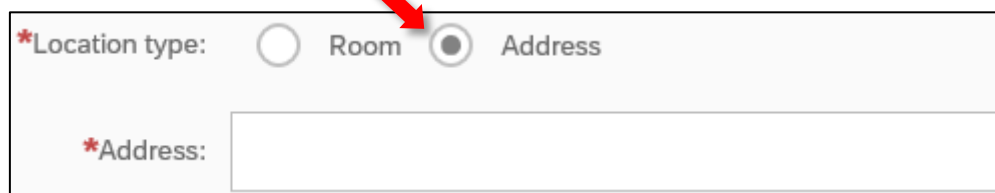
If **you so wish**, by choosing Option A1 you can indicate the GPS coordinates for the equipment location by clicking on the “**Add GPS coordinates**” button:



*Location: 

Option A2: Location type - Address

If you select “**Address**”, please enter the exact address where the equipment can be found outside of EPFL.



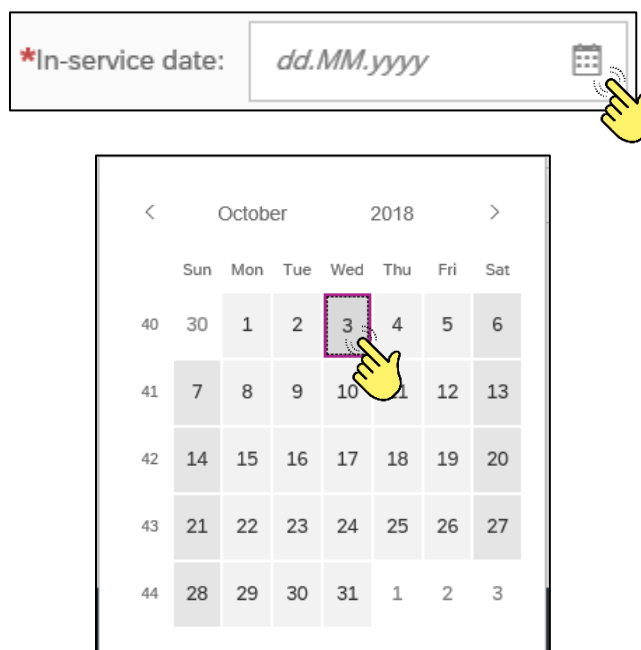
*Location type: ☐ Room ☒ Address


*Address:

- 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:



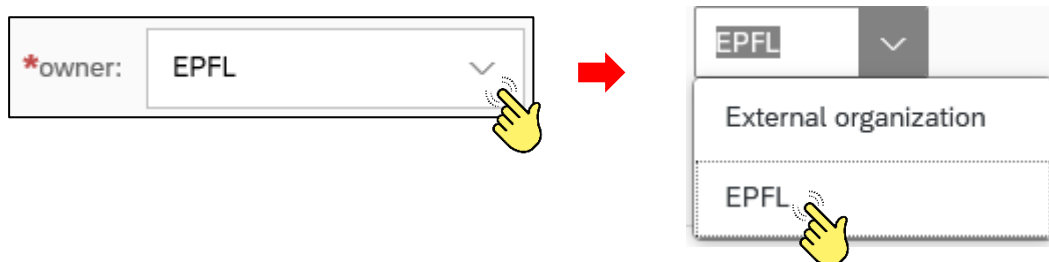
*In-service date: 

< October 2018 >							
	Sun	Mon	Tue	Wed	Thu	Fri	Sat
40	30	1	2	3	4	5	6
41	7	8	9	10	11	12	13
42	14	15	16	17	18	19	20
43	21	22	23	24	25	26	27
44	28	29	30	31	1	2	3

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.

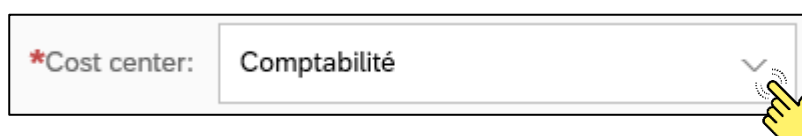


Please note that the “**Private**” option concerns all computers owned by EPFL employees and used for educational or research purpose which the owner wishes to enter in the inventory, after the VPO authorisation; the “**External organization**” option concerns all items, which have been loaned or rented,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



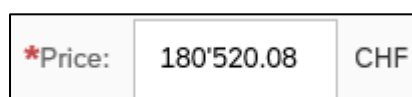
- 13. Cost center:** please note that the application will only display the cost centers for which you are authorised to create inventory records. If you are authorised to create inventory records for multiple cost centers, you can click on the small icon on the right to open a window with the cost centers available to you. Please select the cost center responsible for managing the equipment to be entered in the inventory.

Example



- 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



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> 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.

Picture:



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:

Scientifical equipment

*Manufacturer:

Accuri Cytometers (Europe) Ltd

*Equipment short text:

Vector signal analyzer

*Status:

In service

▼

*Location type:

☒ Room
 ☐ Address

*Location:

BI A1 486

Add GPS coordinates

*In-service date:

15.10.2018

*owner:

EPFL

▼

*Cost center:

Comptabilité

▼

*Price:

20'000.00


CHF

Picture:

Select a document


Browse...

Save




The application will display the inventory record you have created.

Example with a purchase order

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

Example without a purchase order

MAIN DATA	ADDITIONAL DATA	ATTACHED DOCUMENTS	HISTORY
<p>Equipment number: 25000016</p> <p>Yellow barcode n°: B203013</p> <p>Origin: Obtained without a PO</p> <p>Serial number: 3842011160</p> <p>Class: Optical microscopes</p> <p>Equipment category: Scientifical equipment</p> <p>Manufacturer: CARL ZEISS AG</p> <p>Equipment name: Invert Microscope Primovert</p> <p>Status: In service</p> <p>Control status: Uncontrolled</p> <p>Location: AI 1217 </p> <p>In-service date: 17.10.2018</p> <p>Owner: EPFL</p> <p>Cost center: C1305 -</p> <p>Price: CHF 4'588.02</p>			

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 in the inventory database.

If you wish to change the confidentiality status, click on this icon:



Please think carefully before setting your equipment to confidential. If in doubt, contact the inventory support service by email: sf@epfl.ch.



- 2. User:** you can search for the contact person responsible for the use of the item.
 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

The first screenshot shows a search bar containing the text 'Jeni'. Below it, a list of three employees is displayed:

Jenikov Justiniano	181538
Jenifer Miehlabradt	179424
Jeniffer Lima Graf	275084

A hand cursor is pointing to the first result, 'Jenikov Justiniano'.

The second screenshot shows the same search bar, but now containing the SCIPER number '181538'. The list of results is the same, and a hand cursor is pointing to the first result, 'Jenikov Justiniano'.

- 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

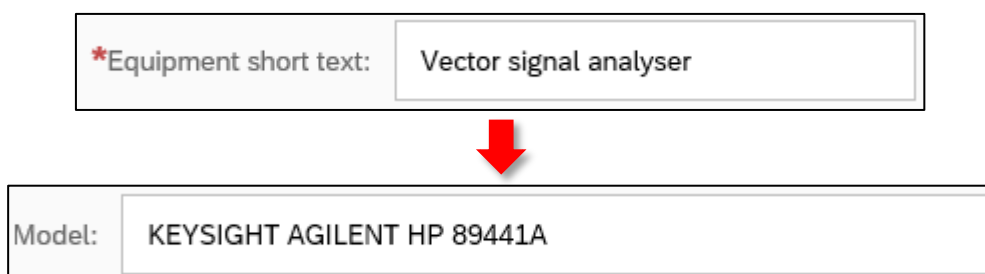
The first screenshot shows a form with the label 'Warranty End date:' followed by a text input field containing the placeholder 'dd.MM.yyyy' and a calendar icon.

The second screenshot shows a calendar for October 2025. A hand cursor is pointing to the 3rd of the month.

	Sun	Mon	Tue	Wed	Thu	Fri	Sat
40	28	29	30	1	2	3	4
41	5	6	7	8	9	10	11
42	12	13	14	15	16	17	18
43	19	20	21	22	23	24	25
44	26	27	28	29	30	31	1

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

Example



The diagram illustrates the relationship between the 'Equipment short text' and the 'Model' fields. At the top, a box labeled '*Equipment short text:' contains the text 'Vector signal analyser'. A red arrow points down from this box to a second box labeled 'Model:' which contains the text 'KEYSIGHT AGILENT HP 89441A'.

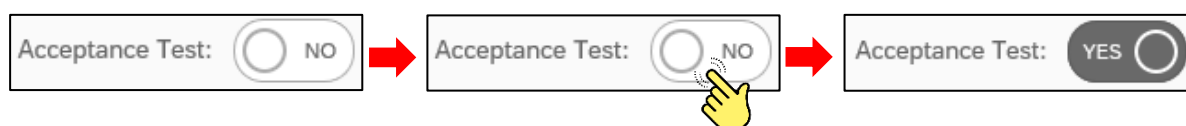
5. **Generic field:** here you can add further information that you have not yet entered.

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



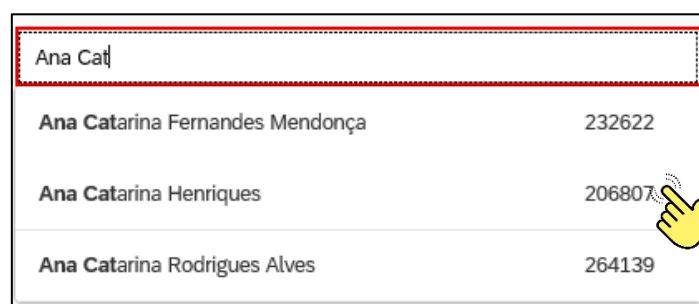
The diagram shows a sequence of three 'Acceptance Test' status icons connected by red arrows. The first icon is 'NO' (radio button). The second icon is 'NO' (radio button) with a yellow hand cursor clicking on it. The third icon is 'YES' (radio button).

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

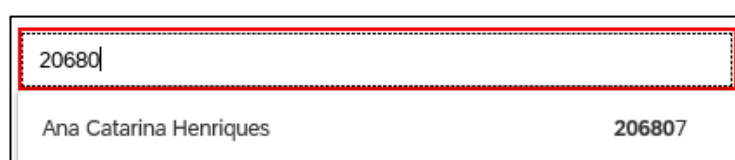


A search field labeled 'Equipment tested by:' with a red border, indicating where to enter a name or SCIPER number.



Search results for 'Ana Cat' showing a list of employees with their names and SCIPER numbers. A yellow hand cursor is pointing at the entry for Ana Catarina Henriques.

Name	SCIPER
Ana Catarina Fernandes Mendonça	232622
Ana Catarina Henriques	206807
Ana Catarina Rodrigues Alves	264139



Search results for '20680' showing a list of employees with their names and SCIPER numbers. The entry for Ana Catarina Henriques is highlighted.

Name	SCIPER
Ana Catarina Henriques	206807

- 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.

ATTACHED DOCUMENTS

Attachments (0) **1** 

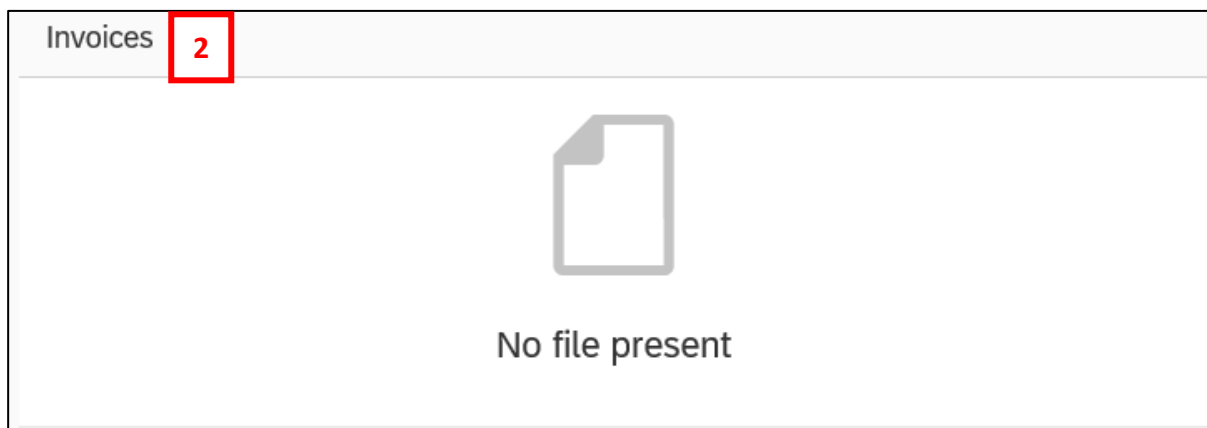


No file present

Drop files to upload, or use the "+" button.

Invoices

2. **Invoices:** the system will automatically display the invoices relating to the purchase order concerned for consultation.



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

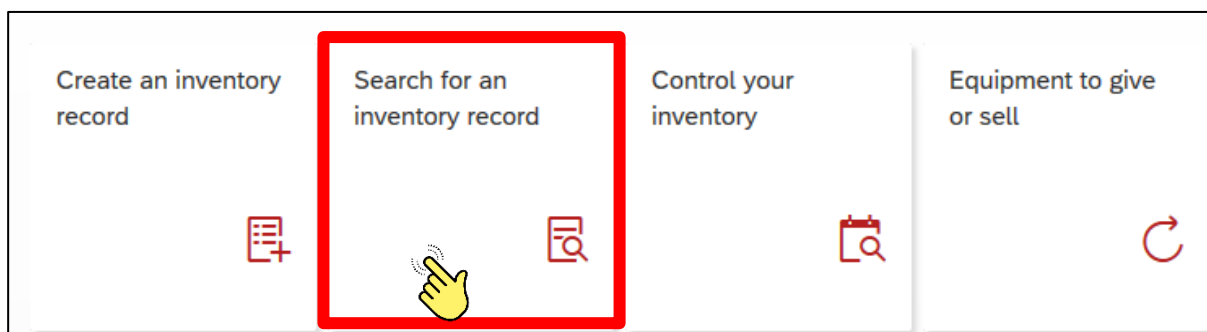
HISTORY			
Maintenance history			
Date	User	contact email	Detailed description
27.11.2018	278405	emmanuelle.polcari@epfl.ch	Création équipement
29.11.2018	278405	emmanuelle.polcari@epfl.ch	Modification équipement
29.11.2018	278405	emmanuelle.polcari@epfl.ch	Modification équipement

6. Search for an inventory record

a. Introduction

If you would like to look for an item 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.



b. Search page

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

Example

Description:

Inventory number:

Yellow barcode n°:

Serial number:

Status:

Location:

Cost center:

Purchase order number:

Class:

Manufacturer:

Model:

User:

Generic Field 1:

Generic Field 2:

Clear

Adapt Filters

Inventory documents (11559)

Description	Inventory number	Yellow barcode n°	Serial number	Status	Location	Cost center	Purchase order number	Class	Manufacturer	Model	User	Generic Field 1	Generic Field 2	Generic Field 3
Laptop	25000074	B203316	3GK6552	In service	AAB 0 01	C1388		Laptop	DELL / Dell SA	Dell Latitude 7490	Jonathan Vesin			
Test	25000073	A810207	A810207	In service	HORS CAMPUS	C1380	3000638256	Software	Microsoft					
laptop	25000072	B203314	PC-0YXKNZ 18/10	In service	MA B3 485	C1317		Laptop	Lenovo	ThinkPad T480s	Aras Ergus			
Baie de stockage	25000071	B203315	GNRCFTJ-1 838F04511	In service	AI 9249	C1306		Component s	Dell	Dell EMC ME412	Gioele La Manno			

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

Description:	Inventory number:	Yellow barcode n°:	Serial number:	Status:	Location:
<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>
Cost center:	Generic Field 1:	Generic Field 2:	Generic Field 3:	Inactive equipments:	
<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="checkbox"/> Display	
					Clear Adapt Filters

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

Inventory documents (11531)														
Description	Inventory number	Yellow barcode n°	Serial number	Status	Location	Cost center	Purchase order number	Class	Manufacturer	Model	User	Generic Field 1	Generic Field 2	Generic Field 3
Dell U2715H	25000033	B202718	C7ZFHP2	In service	AAB 0 09	C1306	3000150629	Monitors	DELL	Dell U2715H	Gioele La Manno	INC0256126		
Dell UltraSharp U2412M	25000032	B202715	4DM6QL2	In service	AAB 1 18	C1384	3000150895	Monitors	DELL	UltraSharp U2412M	Paul Schalbetter	INC0257022		
Zyla 4.2MP Plus USB3	25000031	B202216	VSC-08849	In service	AI 3236	C1349		Lab cameras	Nikkon					
Latitude 5590 XCTO	25000030	B202717	CVY7JR2	In service	AAB 2 01	C1395	3000636916	Laptop	DELL	Latitude 5590 XCTO	Sripama Ghosal	SV-08-084	INC0249235	
Synthesizer peptides	25000029	B202669	DA3695	In service	AI 2246	C1398		Chemical reactors	CEM	909455		Discover Bio Manual Microwave	2304/1380	
Zeiss Axio observer 7	25000028	B202217	036-61515	In service	AI 3235	C1349		Optical microscopes	CARL ZEISS AG					
Ordinateur Portable Alienware 13	25000027	B202719	7XR3JR2	In service	AAB 0 18	C1415	3000149993	Laptop	DELL	Alienware 13	Romain Groux	SV-52-001	INC0253266	
Ecran LED Samsung QM49H	25000026	B202721	04X9HSFK60 0118	In service	SV 2842	C1412	3000150040	Monitors	SAMSUNG	Samsung QM49H	Lucille Delisle	INC0251647		

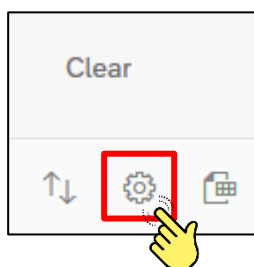
You can export your search results in Excel format by clicking on this small icon:



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



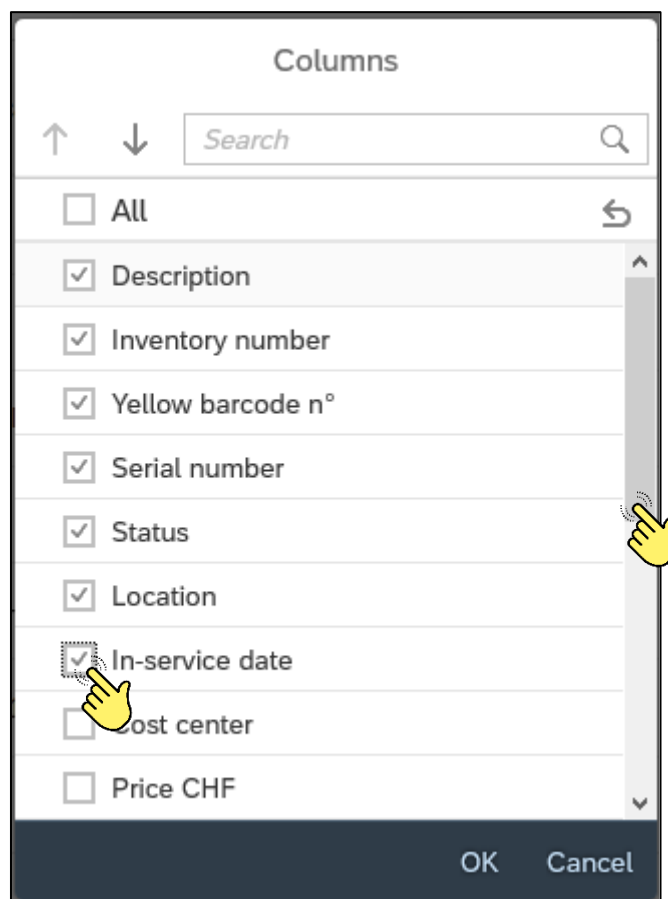
Example



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.



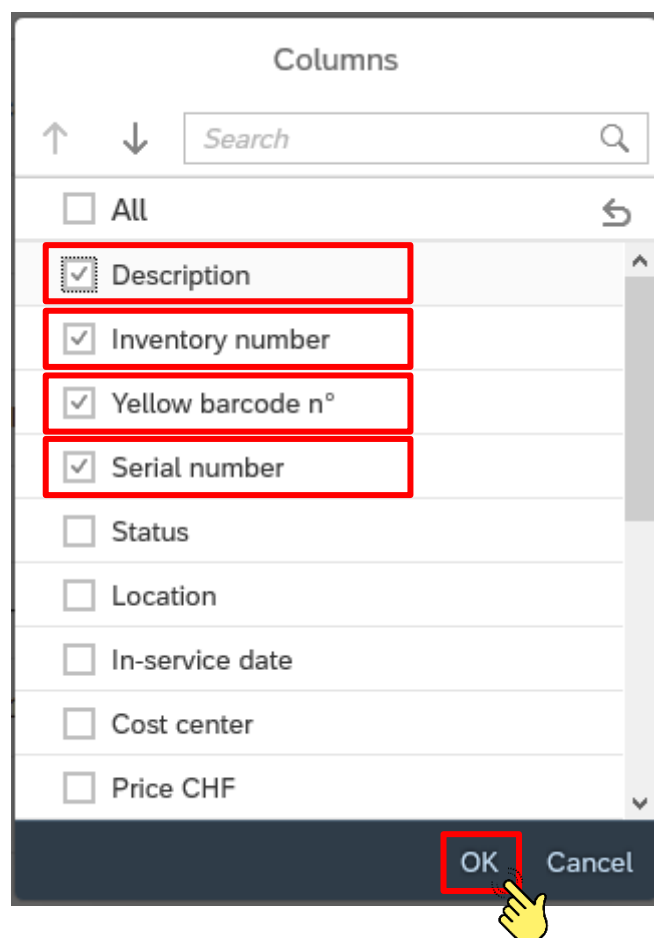
You can also enter the name of the filter in the search bar to find it more easily.

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



<

EPFL

Search inventory record ▾

Q

Description:

Inventory number:

Yellow barcode n°:

Serial number:

Transfer status:

Inactive equipments:

☐ Display

Clear

Inventory documents (73573)

↑↓

Description	Inventory number	Yellow barcode n°	Serial number
MacBook Pro 13-inch: 2.3GHz dual-core i5	25001086	B209090	C02YP1ZW410
MacBook Pro 15-inch with Touch Bar: 2.3G	25001085	B129530	C02YX2F4LVDR
Base;Optiplex 7060 Small Form Factor XC	25001084	B128182	936DCY2
1U Server SR530	25001083	B110525	S4AZQ267

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

Search inventory record

Description: **Incubateur** Inventory number: Yellow barcode n°: **B202215** Serial number: Transfer status:

Inactive equipments: ☐ Display Clear

Inventory documents (1)

Description	Inventory number	Yellow barcode n°	Serial number
Innova Agitateur Incubateur	20100799	B202215	SI42HI403707



Innova Agitateur Incubateur

Label number: B202215 Manufacturer: Brunswick Status: In service Location: AI 3233

MAIN DATA ADDITIONAL DATA ATTACHED DOCUMENTS HISTORY

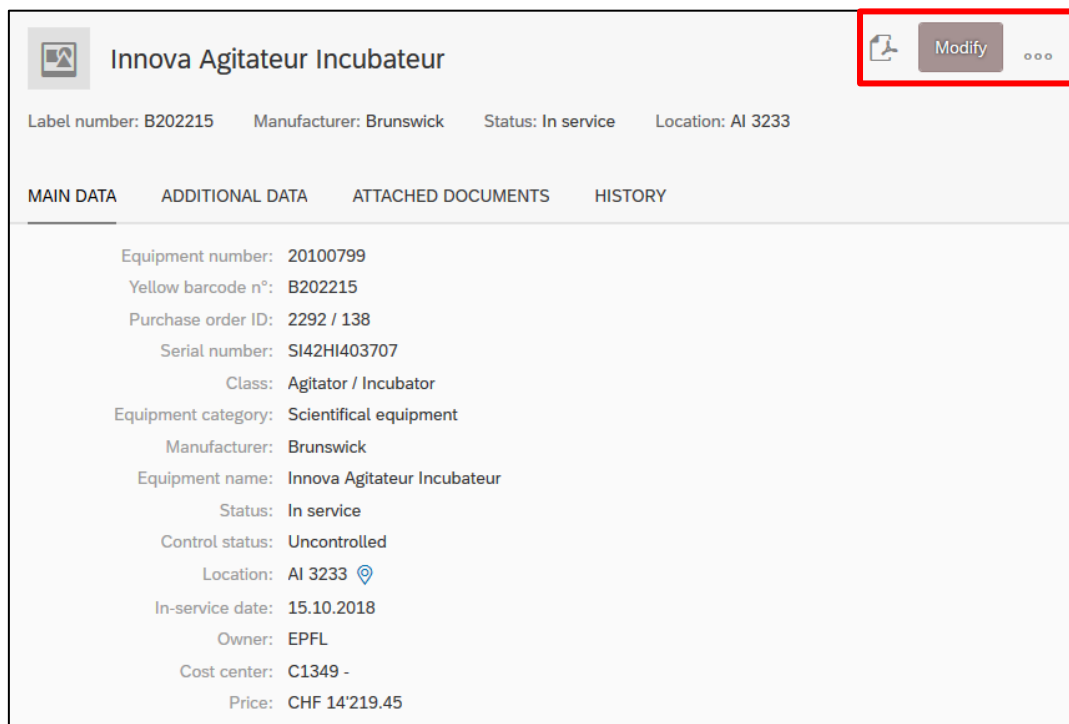
Equipment number: 20100799
 Yellow barcode n°: B202215
 Purchase order ID: 2292 / 138
 Serial number: SI42HI403707
 Class: Agitator / Incubator
 Equipment category: Scientific equipment
 Manufacturer: Brunswick
 Equipment name: Innova Agitateur Incubateur
 Status: In service
 Control status: Uncontrolled
 Location: AI 3233
 In-service date: 15.10.2018
 Owner:
 Cost center: C1349 -
 Price: CHF 14'219.45

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

c. Modification of an inventory record

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

Example




Innova Agitateur Incubateur

Label number: B202215 Manufacturer: Brunswick Status: In service Location: AI 3233

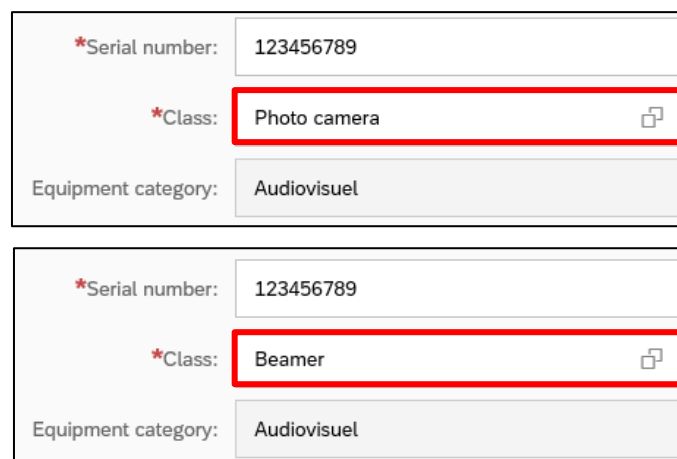
MAIN DATA ADDITIONAL DATA ATTACHED DOCUMENTS HISTORY

Equipment number: 20100799
 Yellow barcode n°: B202215
 Purchase order ID: 2292 / 138
 Serial number: SI42HI403707
 Class: Agitator / Incubator
 Equipment category: Scientifical equipment
 Manufacturer: Brunswick
 Equipment name: Innova Agitateur Incubateur
 Status: In service
 Control status: Uncontrolled
 Location: AI 3233
 In-service date: 15.10.2018
 Owner: EPFL
 Cost center: C1349 -
 Price: CHF 14'219.45

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



***Serial number:** 123456789

***Class:** Photo camera

Equipment category: Audiovisuel

***Serial number:** 123456789

***Class:** Beamer

Equipment category: Audiovisuel

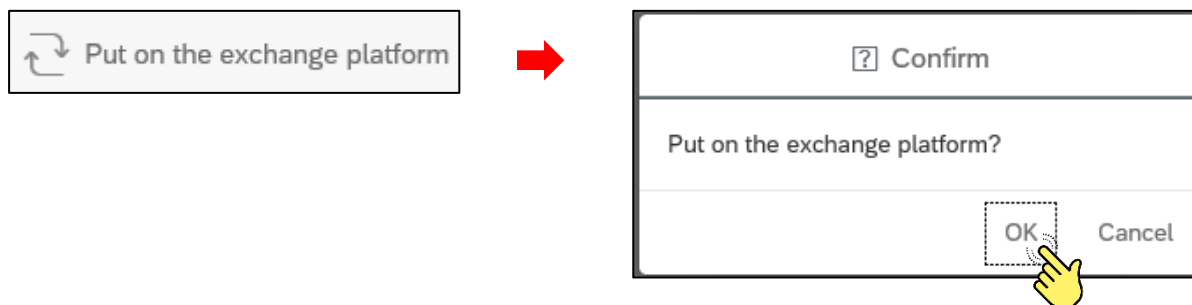
Before

After

By clicking on the small icon on the top right  , you can access further actions.

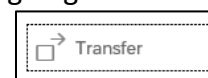
c. 2 Put equipment on the exchange platform

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

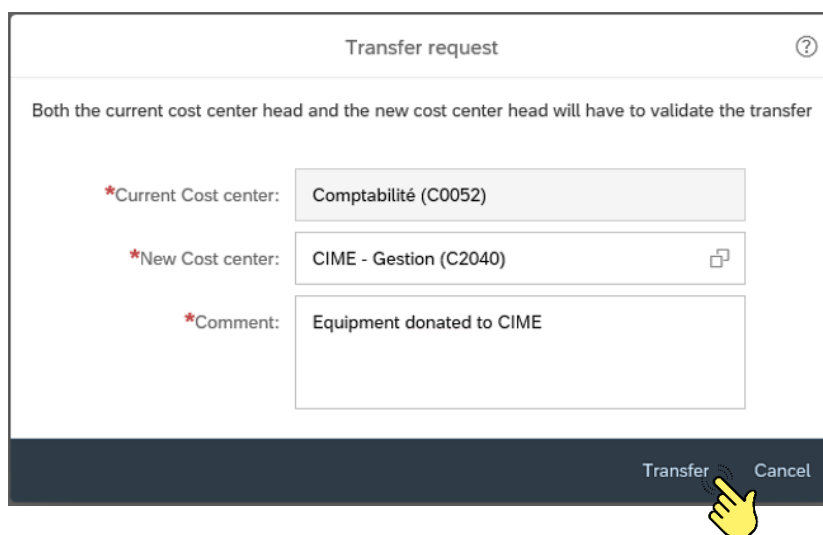


c. 3 Transfer cost center equipment

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:



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 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.

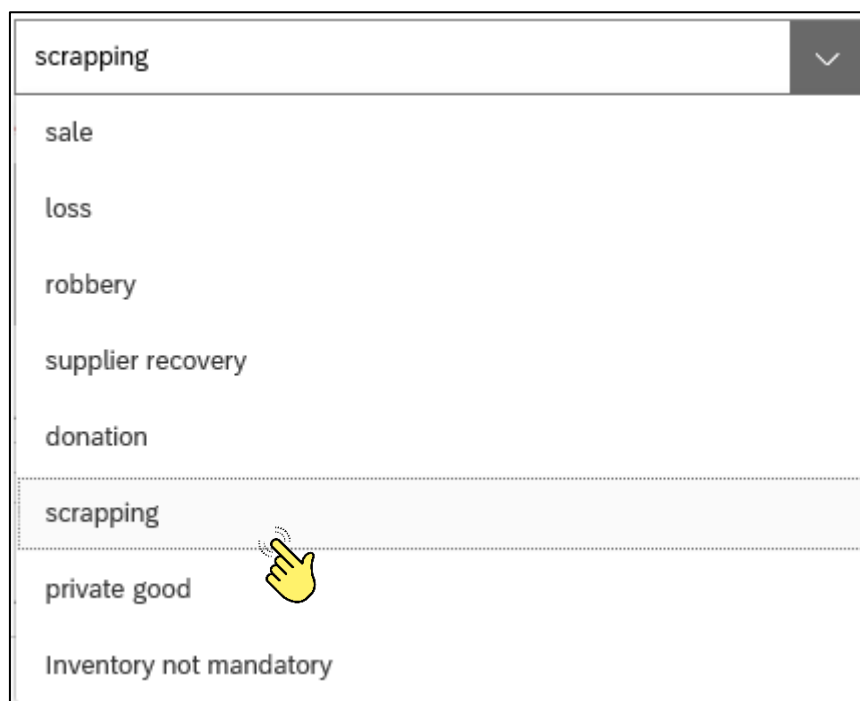


For all other equipment, please click the ***"Inventory write-off"*** button shown below to begin the process of removing equipment from the inventory.



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



Inventory write-off

*Write-off reason:

scrapping

*Comment:

Broken equipment - irreparable

An attachment is mandatory in the following cases :

- Sale (attach the sales contract or a sales document)
- Donation (attach a document indicating who will receive the equipment)
- Theft (attach a document from the DSPS)

Attachments (0)

No file present

Drop files to upload, or use the "+" button.

Write-off cancellation Confirm the write-off

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 Infrastructures¹ 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

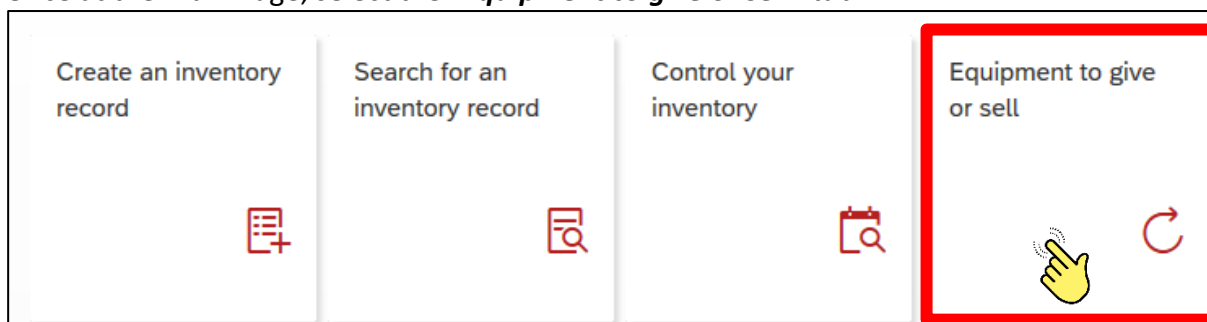
As required by the LEX 5.9.1, when a unit no longer needs inventoried equipment (excluding IT items²), although it is still usable, the Inventory Coordinator has to put the item on the exchange platform for at least 2 months, in order to give the opportunity to other EPFL units to evaluate a possible reallocation.

There are several benefits to use the exchange platform:

- Knowing availability of equipment to give/sell /exchange during a purchase procedure ;
- A fast and smart exchange of data ;
- A data centralization ;
- A better management of public funding.

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

Once at the Main Page, select the **"Equipment to give or sell"** tab.

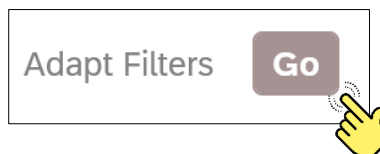


Once inside, the application will open a window with an empty list.

Example

² Each IT item that is no longer useful (or in case of buy-back) has to be sent to CRI (IT Repair Center).

Click on **“Go”** to bring up the list of available equipment on the exchange platform.



Example

EPFL Exchange platform

Standard ▾

Equipment: Manufacturer:

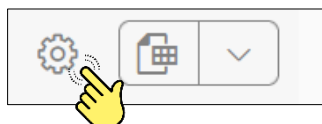
Adapt Filters **Go**

Inventories (63)

Yellow label no.	Equipment	Property category	Keyword	Manufacturer	Unit	Date of commissioning	Donation date
B022120	MICROSCOPE ZEISS (20014385)	Equipements scientifiques	Other microscopy equipment	Carl Zeiss AG	GR-SCHUHM ACH	01.11.2002	15.11.2022 >
B023937	MICROTOME MICROM HM 355S (20017048)	Equipements scientifiques	Other microscopy equipment	MICROM	SV-DO	01.01.2005	22.12.2022 >
B026439	INTERFACE PC ELECTROPHYSIOLOGIE (20018373)	Equipements scientifiques	Other electrophysiol. & medical equip.	INSTRUTECH	LSSENS	01.06.2004	10.10.2022 >

If you select a wished item, the application will display the main data and the unit to contact in order to find more information.

If you click on the icon « **Settings** », selecting information that you order.



you can customize your list by what you want to see and the display

You can also download the list of available equipment in Excel format by clicking on the corresponding icon



If your Unit wishes to put an item on the exchange platform, please refer to Chapter 6, paragraph c.

You can also remove an item from the exchange platform by clicking the **“Remove from the exchange platform”** button and confirming your action.



Reasons why you can remove an item from the exchange platform:

- Change of mind of the unit ;
- Initiating a transfer request in favour of another EPFL unit ;
- Initiating an inventory write-off request.

8. Control your inventory

a. Introduction

Every year, EPFL units have to control inventoried equipment. This involves confirming the existence of equipment and the accuracy of data, in accordance with the regulations laid out in the LEX 5.9.1 (*EPFL Directive on Inventories*).

Each Unit is required to control, modify (if necessary) and validate its inventory once per year.

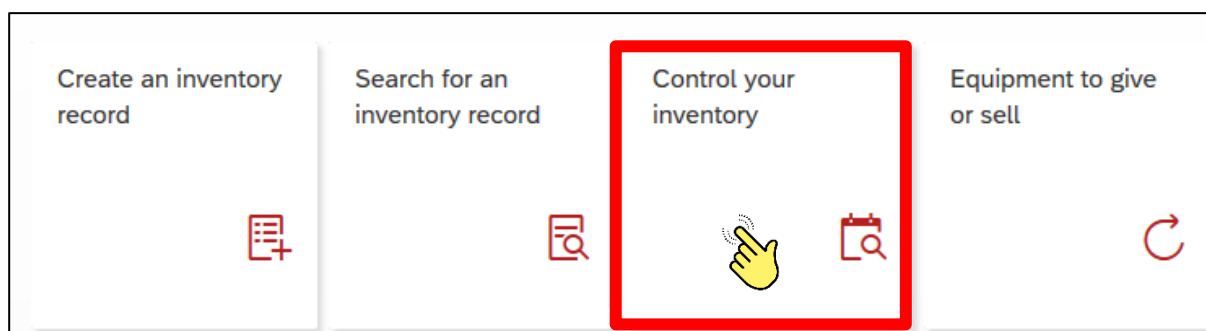
The EPFL Inventory Coordinator will communicate the schedule for the control in conjunction with the Schhols/VP.

Please note that regularly updating data allows for improved cost sharing and allows all EPFL employees to search for equipment.

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 SESAME – Inventory Assets and click on the “**Control your inventory**” tab.



b. Inventory control

Once you have clicked on the **“Control your inventory”** tab, please enter the cost center (unit) that you has to control and then click on **“Go”**.

Example

The screenshot shows the 'Inventory control to be carried out' page. The 'Cost Center' field is set to 'C0052'. A red arrow points to the 'Go' button. Another red arrow points to the 'Adapt Filters (1)' button. The 'Validation status' dropdown is set to 'Uncontrolled (2)'. The 'Equipment(s)' table is empty, showing 0 items.

Once you have selected the cost center, the application will open your inventory made up of all of the inventoried items managed by the unit.

Example

The screenshot shows the 'Inventory control to be carried out' page. The 'Cost Center' field is set to 'C1193'. A red arrow points to the 'Go' button. The 'Validation status' dropdown is set to 'Uncontrolled (2)'. The 'Equipment(s)' table shows 8 items.

Equipment(s) (8)	Validation status	Yellow barcode number	Class	Status	Location	Unit	Cost Center	Control step
<input type="checkbox"/> IMPRIMANTE BROTHER HL-5270DN	Uncontrolled (2)	B032000	Printers	In service	BC 404	IC-FI	IC-FI (C1193)	Control open
<input type="checkbox"/> MACBOOK AIR 13-INCH _	Uncontrolled (2)	B070230	Laptop	In service	BC 404	IC-FI	IC-FI (C1193)	Control open



By clicking on the validation control status filter, you can choose to view the items that are still to be controlled or those that have already been controlled.

Example

The screenshot shows the 'Validation status' dropdown menu. The 'Controlled' option is selected. A hand icon points to the dropdown arrow.

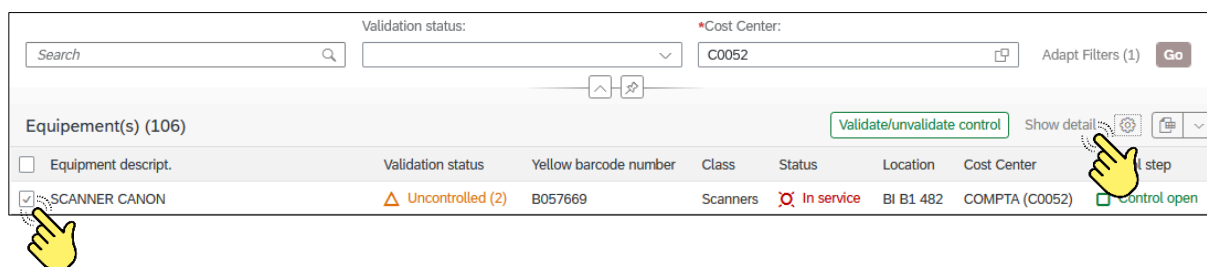
You can also enter any information you like into the empty box to customise your search.

The screenshot shows the 'Search' input field with a magnifying glass icon.

If you wish, you can export your search results in Excel format by clicking on  or you can choose to select the columns to see 

If you need to **modify/update** an inventory record, please select it and then click on « **Show detail** » to open the inventory sheet and make the necessary changes

Example



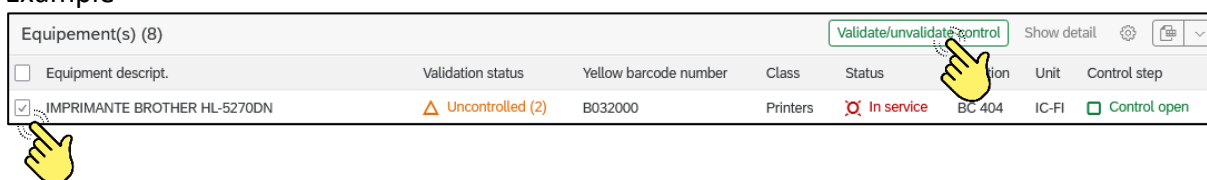
Validation status: *Cost Center: C0052 Adapt Filters (1) Go

Equipement(s) (106)

Equipment descript.	Validation status	Yellow barcode number	Class	Status	Location	Cost Center	Control step
<input checked="" type="checkbox"/> SCANNER CANON	△ Uncontrolled (2)	B057669	Scanners	✗ In service	BI B1 482	COMPTA (C0052)	☐ Control open

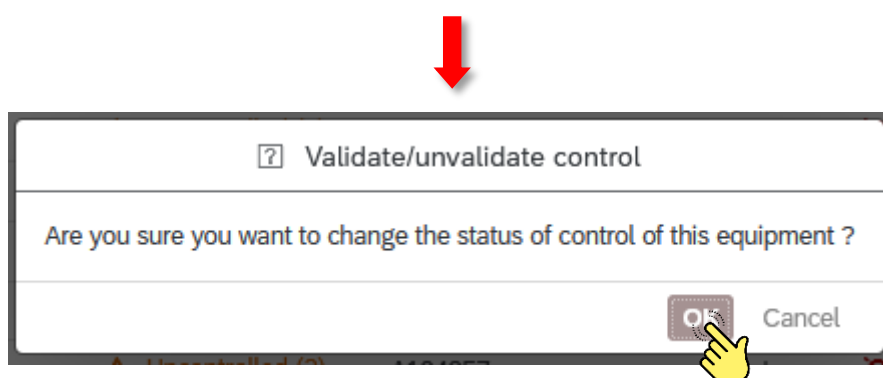
To **approve** the equipment control, please select an item to validate and click on the “**Validate/unvalidate control**” button. The application will ask you to confirm your action.

Example



Equipement(s) (8)

Equipment descript.	Validation status	Yellow barcode number	Class	Status	Location	Unit	Control step
<input checked="" type="checkbox"/> IMPRIMANTE BROTHER HL-5270DN	△ Uncontrolled (2)	B032000	Printers	✗ In service	BC 404	IC-FI	☐ Control open



Validate/unvalidate control

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



IMPRIMANTE BROTHER HL-5270DN

☑ Controlled (1)

You may approve several items at the same time. First, select all of the items that you would like to control and then click the “**Validate/unvalidate control**” button.

Please note that in case of a mistake, the status of control can be updated (before approval of your Head of unit) by clicking on the “**Validated/unvalidate control**” button and confirming the change of the control status.



Once your inventory database (as well as all data) have been checked and validated, an automatic message will be sent to the Head of the unit concerned so that he/she can approve (or refuse) your annual inventory control.

Please contact the VPF sf@epfl.ch if you observe that:

- Your unit is using an item bearing a yellow barcode sticker but this equipment does not appear in your inventory;
- Your unit is using an item that should have been entered in the inventory according the thresholds fixed by the LEX 5.9.1 and it does not bear a yellow barcode sticker.



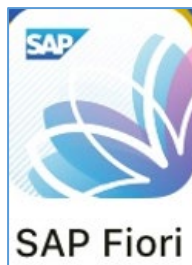
Please note that the approval of a unit's inventory control is subject to a number of **mandatory prior conditions**:

- It has been checked that each item assigned to the unit which appears in the inventory has been correctly entered;
- All inventory sheets for equipment entered in the inventory have been checked and all necessary modifications have been made;
- All measures such as transfer to a cost center, submission to the exchange platform and removal from the inventory have been carried out (if necessary).

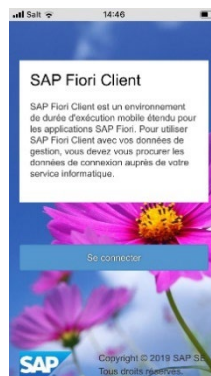
c. Inventory control application

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

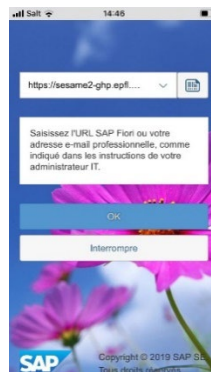
- Identify the equipment registered in your unit and which was physically found
 - Identify the gap between the theoretical rooms and the actual ones
1. Please, make sure that you are connected to the EPFL wifi « epfl »
 2. Please, install the application « SAP Fiori Client », by using the Apple App Store de Apple or Google Play



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



4. Enter the url here below



URL :

<https://sesame2-ghp.epfl.ch/epfl/flp/shells/abap/FioriLaunchpad.html?webviewtype=wk>

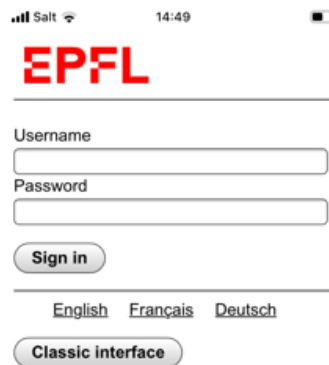


5. Click on « Désactiver code d'accès »



Click on « Suite »

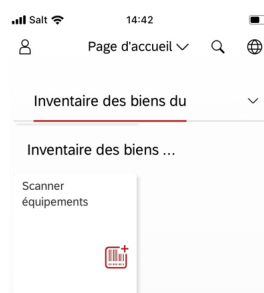
6. Login



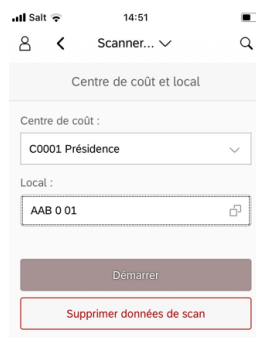
Log-in with your usual user name and your password

Hou can use the app :

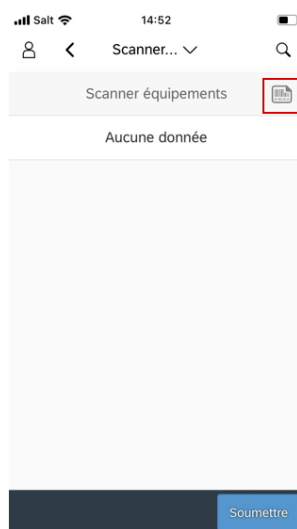
- 1- Open the TAB « Scanner équipements »



2- Choose the cost center and room in question



3- Start the scan



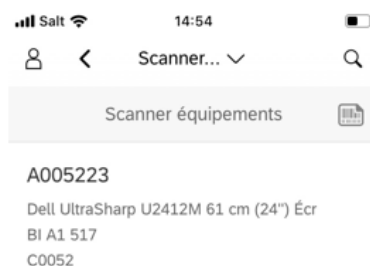
Click on the red icon

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 :

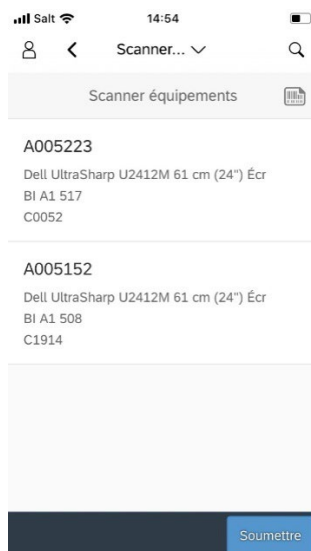


6- Please, scan the other items



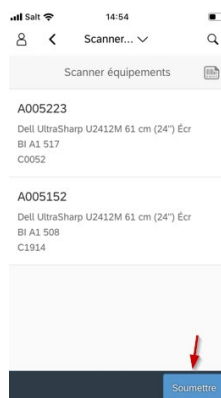
Click on if you want scan other items

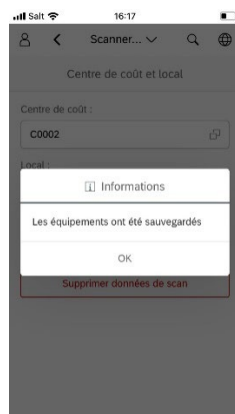
The scanned equipment appear step by step



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

Contrôles inventaire à effectuer

Chaque année les biens des unités doivent être contrôlés. Veuillez contrôler les biens de cette liste et effectuer les modifications nécessaires.
Les données à jour permettent aux chercheurs de localiser un équipement de façon efficace et permettent aussi une meilleure planification du renouvellement des équipements.

Tous les équipements C0002 Rechercher Valider le contrôle

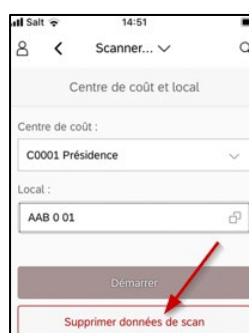
Equipements (34)

Désignation	N° d'étiquette jaune	Classe	Statut	Local	Local selon scan	Unité	Centre de coût	Centre de coût selon scan	
<input type="checkbox"/> Ecran Dell 2007FP	A003372	Moniteurs	En service	CE 3 300		AJ	C0002		Valider le contrôle >
<input type="checkbox"/> ECRAN DELL 2007 FP 20	A003525	Moniteurs	En service	CE 2 325		AJ	C0002		Valider le contrôle >
<input type="checkbox"/> DELL Portable Latitude E6400	A003977	Ordinateurs portables	En service	TRI H 0 04	AAB 0 01	AJ	C0002	C0002	Valider le contrôle >
<input type="checkbox"/> hp Officejet 6000	A004179	Imprimantes	En service	BI 0 453		AJ	C0002		Valider le contrôle >

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. Inventory Reporting

a. Introduction

Depending on the rights you have, on your home page you will have the tile called "**Inventory Reporting**" TAB. This TAB allows you to generate very detailed reports regarding the entire school database.

Example



Please note that this tool is very powerful and allows you to customize different types of reports.

If you need support, please contact sf@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










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

Pending tasks (1)	Inventory Write-off
<div>Search  </div> <div>Formation trois Compta trois</div> <div>Inventory write-off N°B654321</div>	<div>  Signal generator Reason for deactivation: scrapping </div> <div> Requested by: Formation trois Compta trois... on the: 03.12.2018 </div> <div> <div>   0  0  1 </div> <div> Home unit name: Enterprise Resource Planning Equipment Nb: 25000465 Local: AAB 0 01 Equipment user: Start-up date: 03.12.2018 Manufacturer: 3D Systems SA Inventory Nb: B654321 </div> </div>

 0

Accept

Reject

60

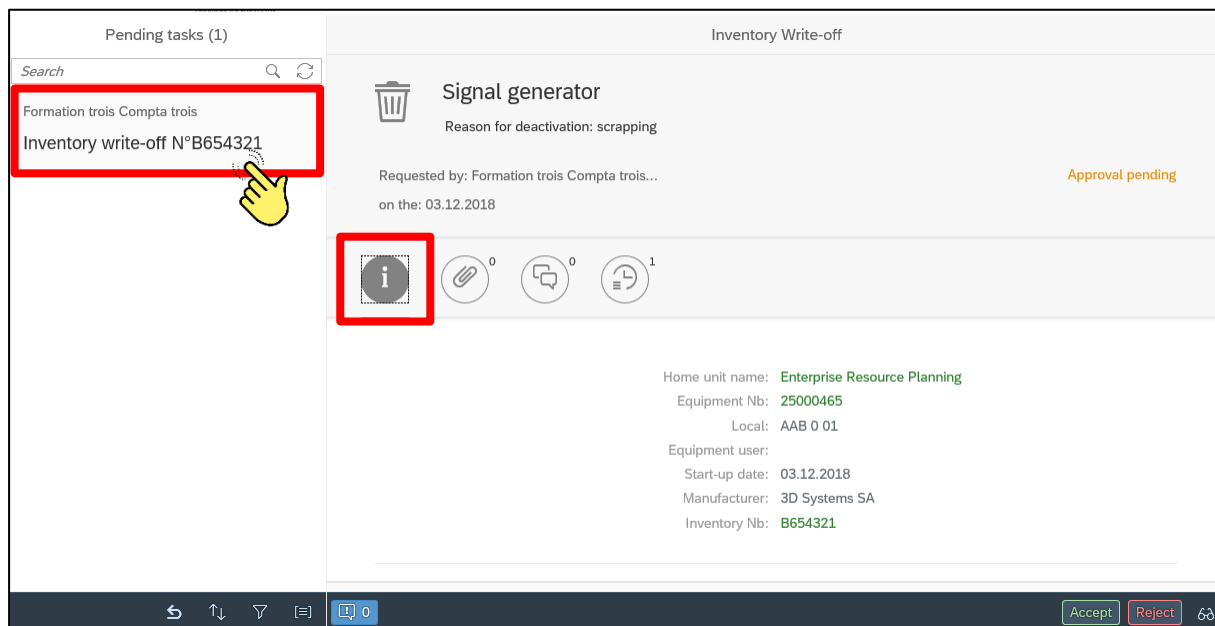
You can search for a specific task or a sort of task to be completed by using the search bar.

Example

Pending tasks (1)

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



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



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



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



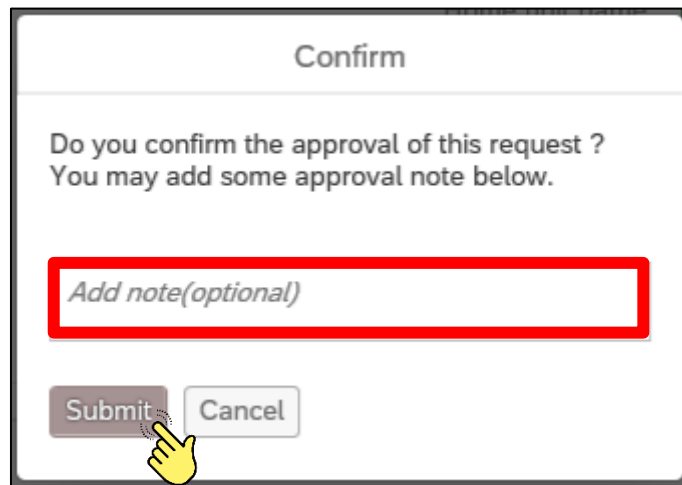
Depending on your level of authorisation, once you have chosen a task to perform, you must accept or refuse the action suggested by clicking the appropriate button on the bottom right.

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



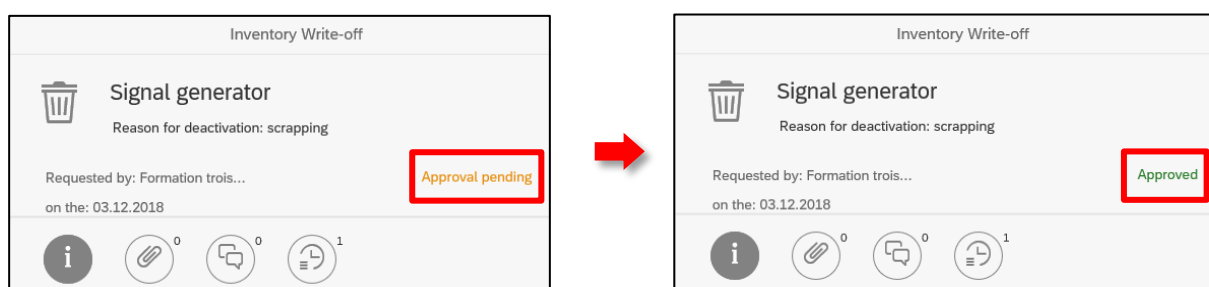
The application will ask you to confirm your choice by clicking on the **“Submit”** button.

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

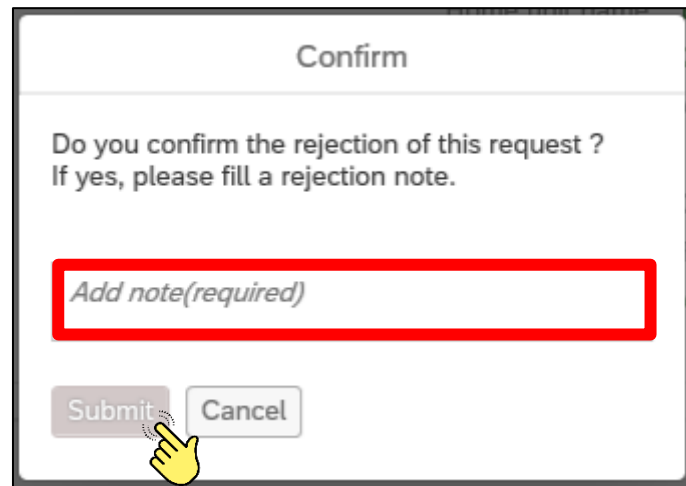


If you wish to refuse the action suggested, click "**Reject**":



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.



Confirm

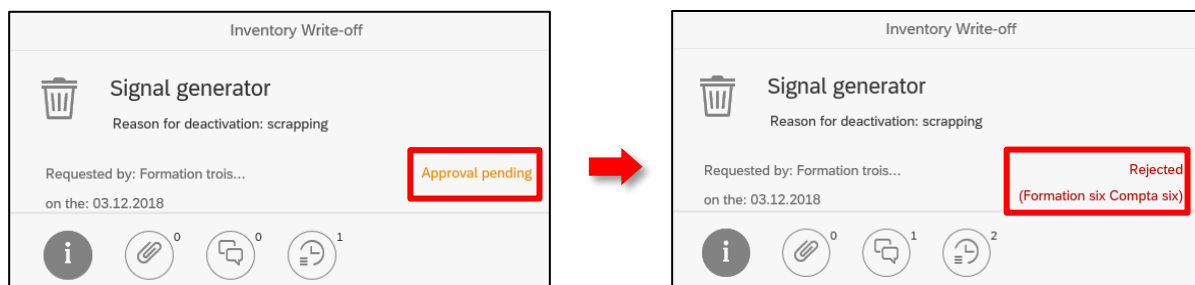
Do you confirm the rejection of this request ?
If yes, please fill a rejection note.

Add note(required)

Submit Cancel

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

Example



Inventory Write-off

Signal generator
Reason for deactivation: scrapping

Requested by: Formation trois...
on the: 03.12.2018

Approval pending

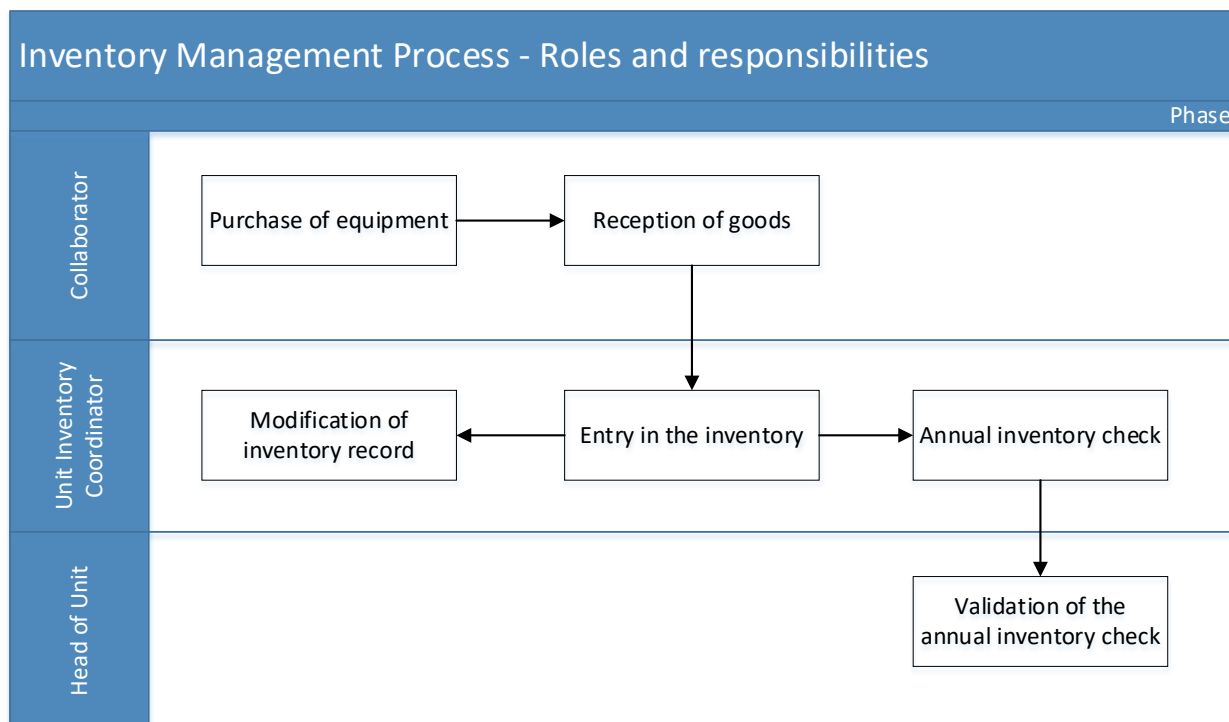
Inventory Write-off

Signal generator
Reason for deactivation: scrapping

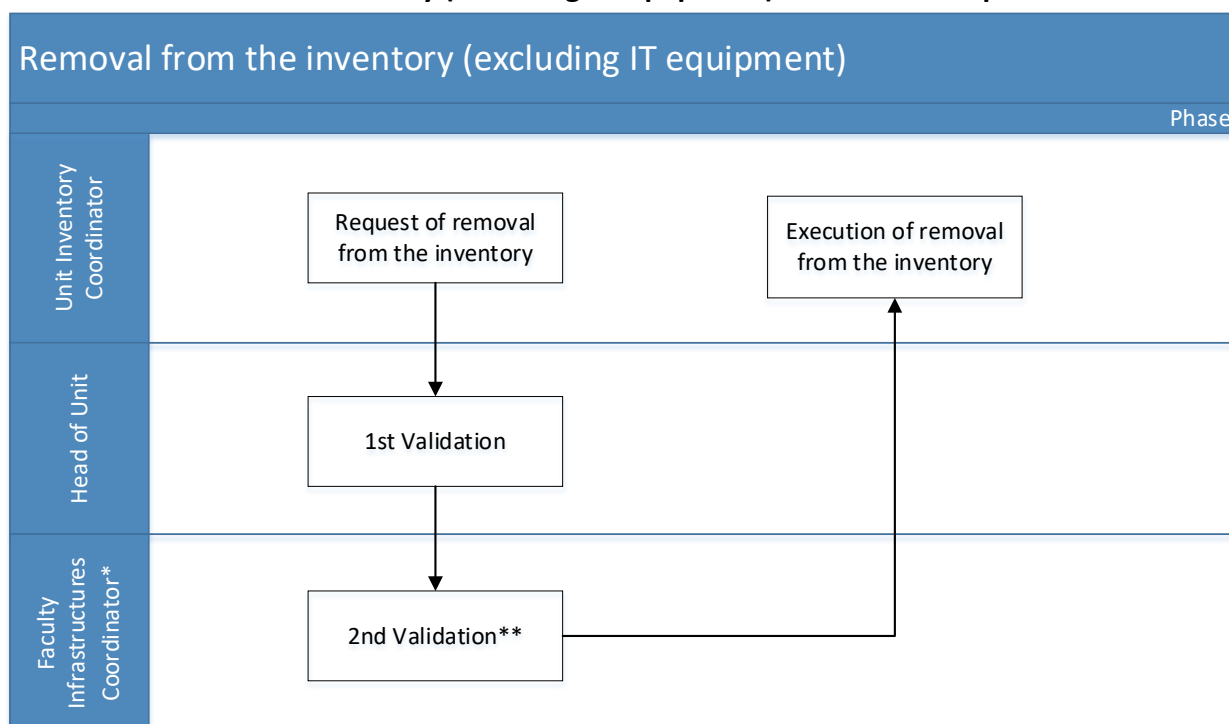
Requested by: Formation trois...
on the: 03.12.2018

Rejected
(Formation six Compta six)

Annex 1: Inventory Process – Roles and Responsibilities

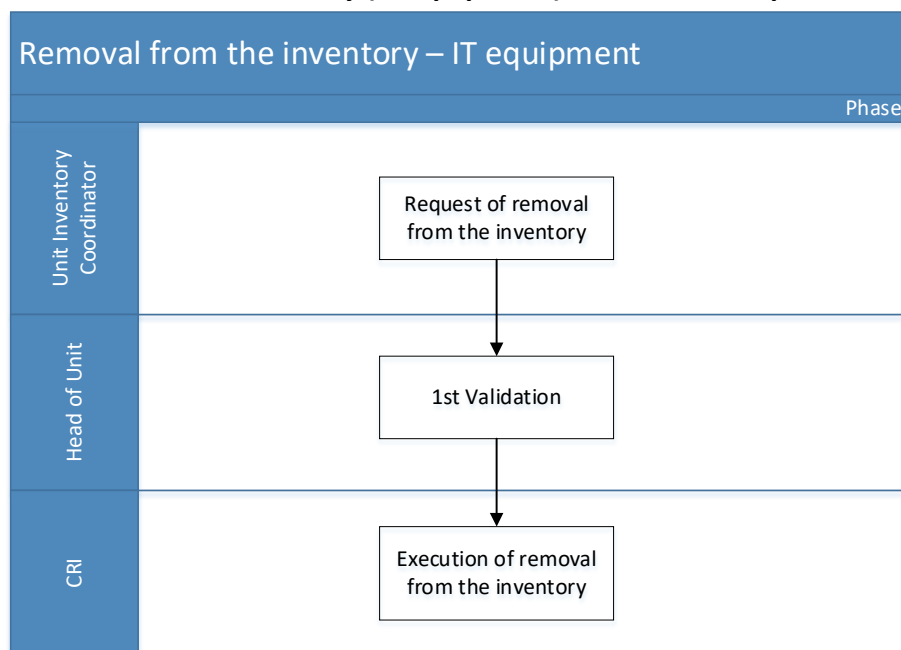
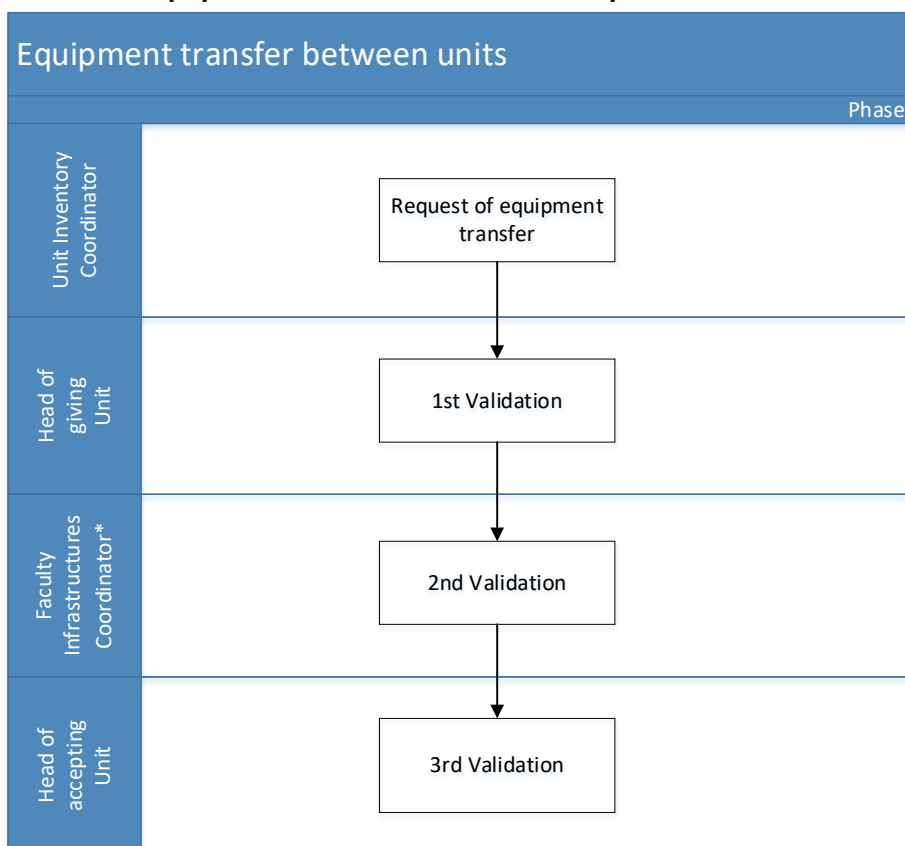


Removal from the inventory (excluding IT equipment) – Roles and responsibilities



* 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**Equipment transfer – Roles and responsibilities**

* Or any other person appointed by other level 2 Units

For assistance, please contact

1234@epfl.ch (ServiceDesk)

or

sf@epfl.ch

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