InTempo

Process Documentation

Department:
Customer Support
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NAME OF PROCESS

Setting up and Maintaining Equipment Yards

Use Case / Objectives

There may be times when equipment will need to be stored at a site other than your primary location. This could be due to time and effort to move the equipment back to your location or because that equipment is going to be used in the same area on another contract. You might also be growing your business and are utilizing a secondary yard to store equipment. No matter the reason, this article will walk you through how to set up a yard, complete address information and accurately reflect where your equipment is located.

Configuration, Training, and Reporting

This document assumes you know how to perform basic Search functionality to find information in the system (i.e., F4 search). The steps for this are not included within this document.

Field definitions for applicable tasks are available in the Reference Glossary. To view these definitions either click on the screen name in the task or scroll to the end of the documentation to view the Glossary.

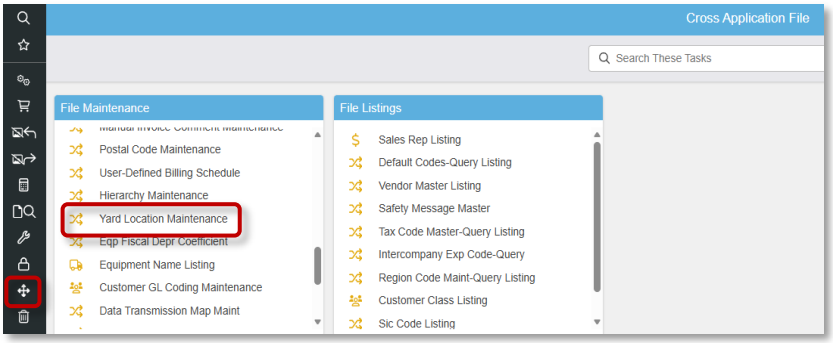
Menu options to access:

Cross Application File Maintenance => File Maintenance => Yard Location Maintenance

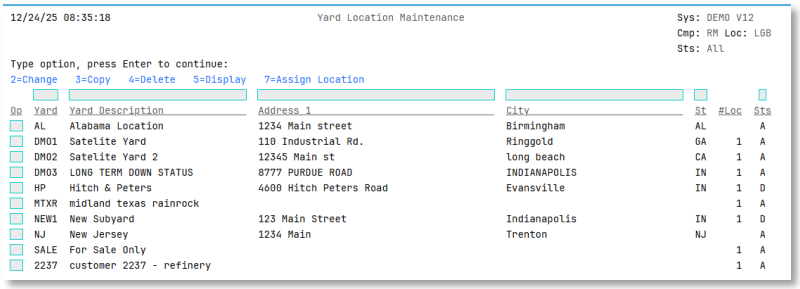
Adding/Updating an Equipment Yard

Process Steps

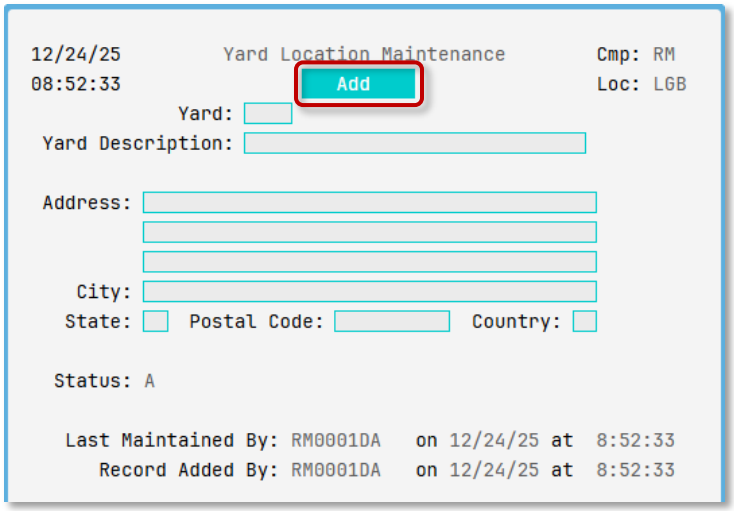
1. Log into the [Roleplay Environment] using your credentials.
2. Select the **Cross Application File Maintenance** menu from the left toolbar.
3. In the **File Maintenance** section, click on the **Yard Location Maintenance** option.



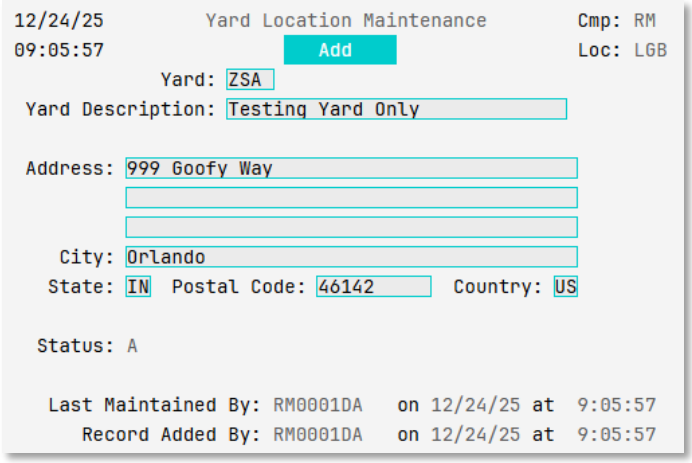
   a. The **Yard Location Maintenance** screen opens displaying a list of existing yards for your company.



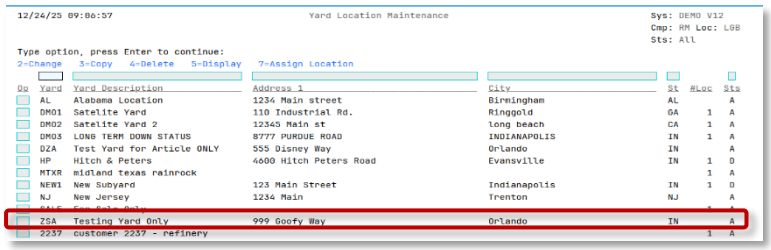
4. Press F6 on your keyboard or click on *F06 Add* in the **Display Functions** menu to add a new yard location.
   a. The **Yard Location Maintenance** pop-up window opens and the *MODE* is **ADD**.



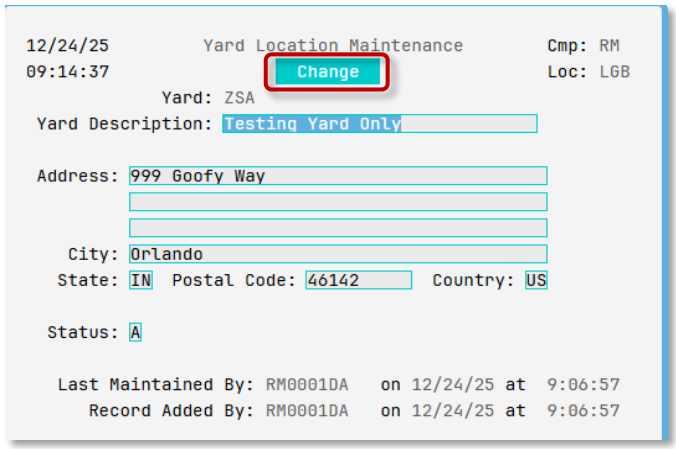
5. Type in the *Yard* and *Yard Description* fields. **NOTE:** These are required fields.
6. If you have the information, type in the address information for the yard. **NOTE:** If you enter a *State* you will also have to enter *Country*. **NOTE 2:** If you do not know the *Country*, with your cursor in the field you can press F4 to search and select.



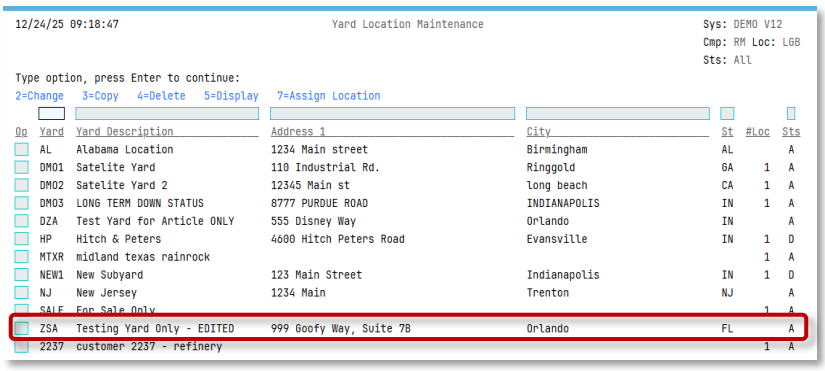
7. Press Enter once you have entered the information for the yard.
   a. The **Yard Location Maintenance** pop-up window closes and the new yard displays in the table.



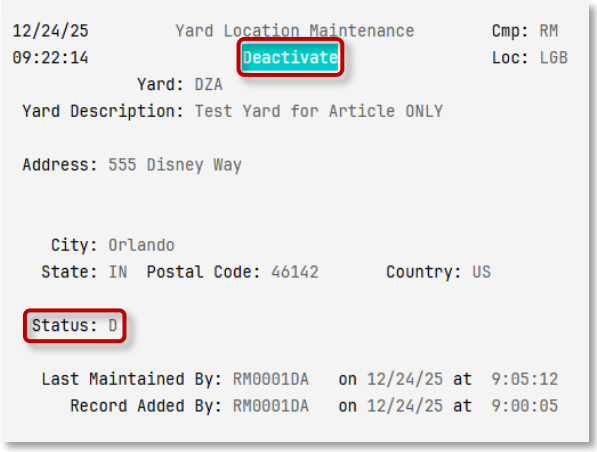
8. To update an equipment yard, type **2** in the *Op* field next to the desired yard and press Enter.
   a. The **Yard Location Maintenance** pop-up window opens displaying the details for the selected yard and the *MODE* is **Change**.



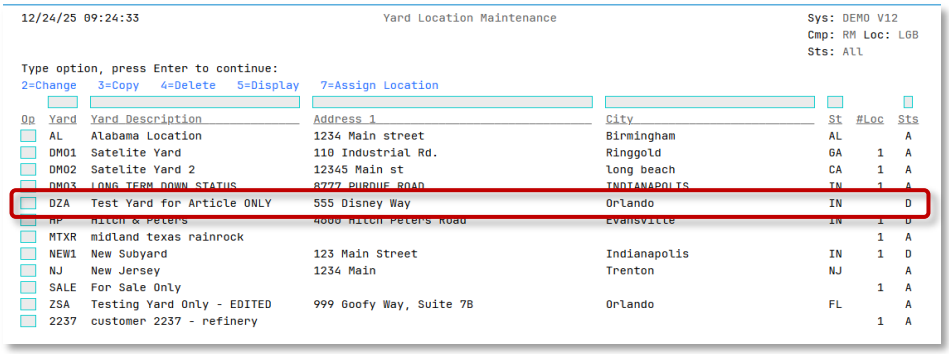
9. Update any desired information and press Enter to save the updates.
    a. The **Yard Location Maintenance** pop-up window closes, and the yard displays as updated in the table. **NOTE:** For this example, the *Yard Description*, *Address 1* and *State* fields were updated.



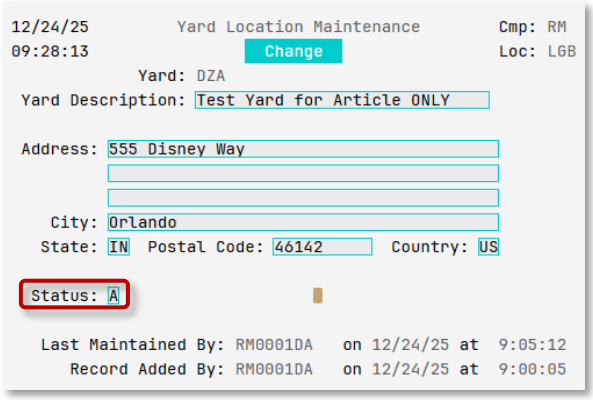
10. To delete an equipment yard, type **4** in the *Op* field next to the desired yard and press Enter.
    a. The **Yard Location Maintenance** pop-up window opens displaying the details for the selected yard, the *MODE* is **Deactivate** and *Status* is **D**.



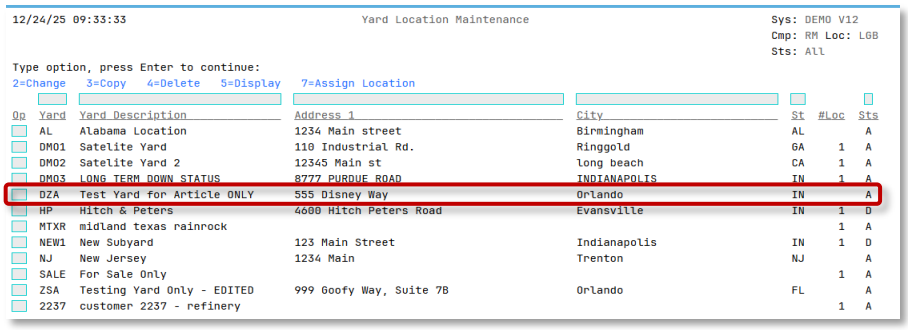
11. Press Enter.
    a. The **Yard Location Maintenance** pop-up window closes and the yard displays in the table with a *Status* of **D**.



12. To reactivate a yard, type **2** next to the desired yard and press Enter.
13. On the **Yard Location Maintenance** pop-up window, type **A** in the *Status* field.



14. Press Enter.
    a. The **Yard Location Maintenance** pop-up window closes and the yard displays in the table with a *Status* of **A**.



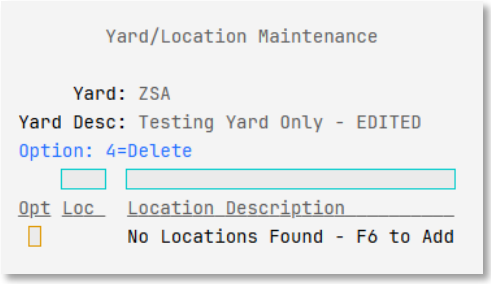
Op	Yard	Yard Description	Address 1	City	St	#Loc	Sts
	AL	Alabama Location	1234 Main street	Birmingham	AL		A
	DM01	Satelite Yard	110 Industrial Rd.	Ringgold	GA	1	A
	DM02	Satelite Yard 2	12345 Main st	long beach	CA	1	A
	DM03	LONG TERM DOWN STATUS	8777 PURDUE ROAD	INDIANAPOLIS	IN	1	A
	DZA	Test Yard for Article ONLY	555 Disney Way	Orlando	IN		A
	HP	Hitch & Peters	4600 Hitch Peters Road	Evansville	IN	1	D
	MTXR	midland texas rainrock				1	A
	NEW1	New Subyard	123 Main Street	Indianapolis	IN	1	D
	NJ	New Jersey	1234 Main	Trenton	NJ		A
	SALE	For Sale Only				1	A
	ZSA	Testing Yard Only - EDITED	999 Goofy Way, Suite 7B	Orlando	FL		A
	2237	customer 2237 - refinery				1	A

Assign/Remove a Yard to a Location

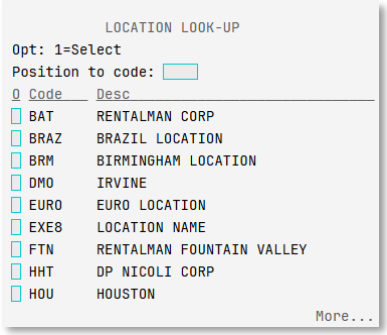
Process Steps

Each yard must be assigned to at least one location (branch). A yard can be assigned to multiple locations. This can be useful in the case of satellite or laydown yards that are located between locations (branches).

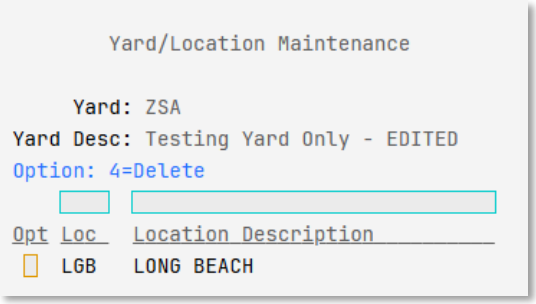
1. If you are not already on the **Yard Location Maintenance** screen, navigate there now (Cross Application File Maintenance => File Maintenance => Yard Location Maintenance).
2. Type **7** in the *Op* field next to the desired yard and press Enter.
    a. The **Yard/Location Maintenance** pop-up window opens.



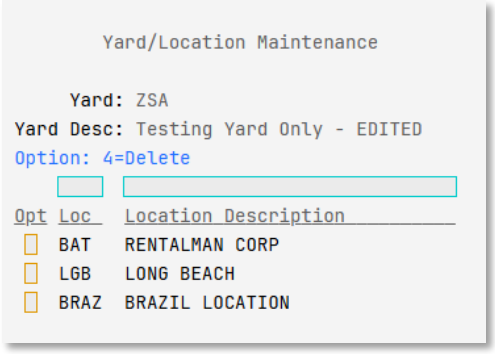
3. Press F6 to add a new relationship.
    a. The **Location Look-up** pop-up window opens.



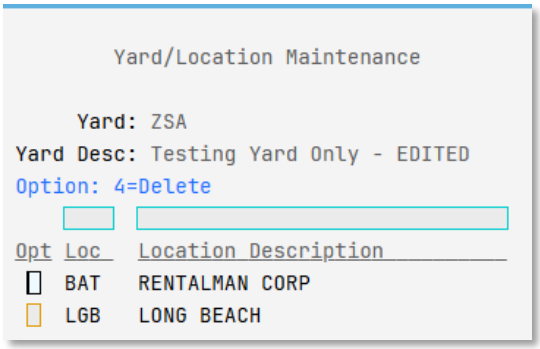
4. To select a location, type **1** in the *O* field next to the desired option and press Enter.
    a. The **Location Look-up** pop-up window closes and the selected location displays on the **Yard/Location Maintenance** window.



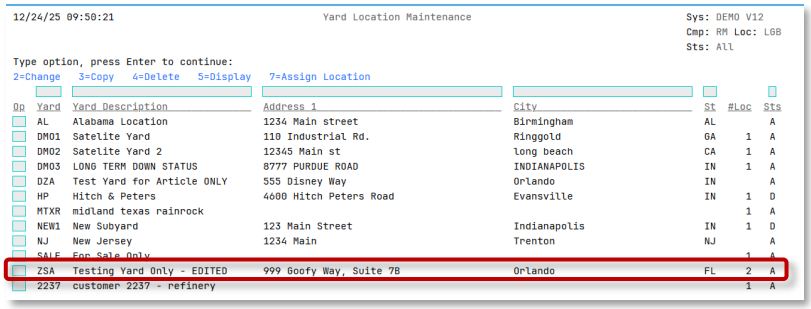
5. You can add additional locations by repeating the steps above until all locations have been added. **NOTE:** For this example, two additional locations were added.



6. To remove a location, type **4** in the *Opt* field next to the desired location and press Enter. **NOTE:** For this example, location **BRAZ** was deleted.



7. When you have finished adding/removing locations for your yard, press F3 or F12 to close the **Yard/Location Maintenance** pop-up window.
   a. The **Yard Location Maintenance** screen displays and the *#Loc* field updates to display the number of locations assigned to the yard.

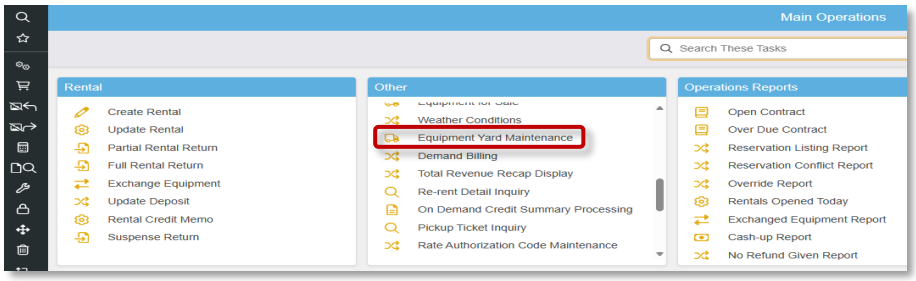


Assign Equipment to a Yard

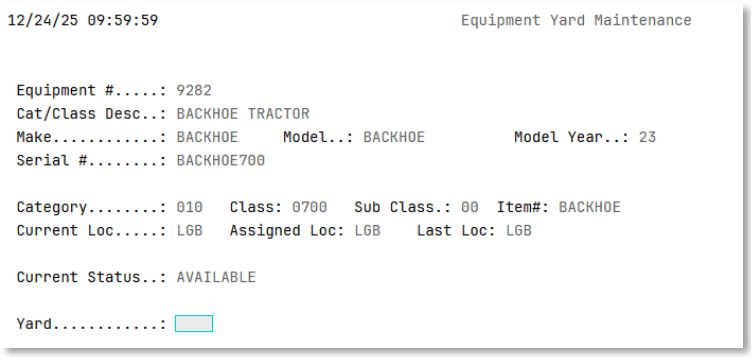
Process Steps

You can assign and update the lard location for equipment through the **Equipment Yard Maintenance** screen or the **Equipment Maintenance** screen.

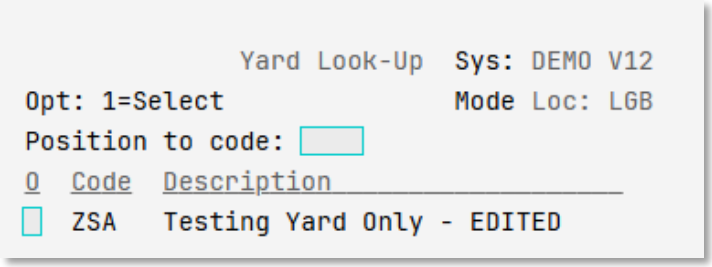
1. Navigate to the **Equipment Yard Maintenance - Launch** screen by clicking on the **Main Operations** menu and then clicking on **Equipment Yard Maintenance** in the **Other** section.



2. Type in the *Equipment #* or press F4 to search.
   a. The **Equipment Yard Maintenance - Details** screen opens for the entered equipment.



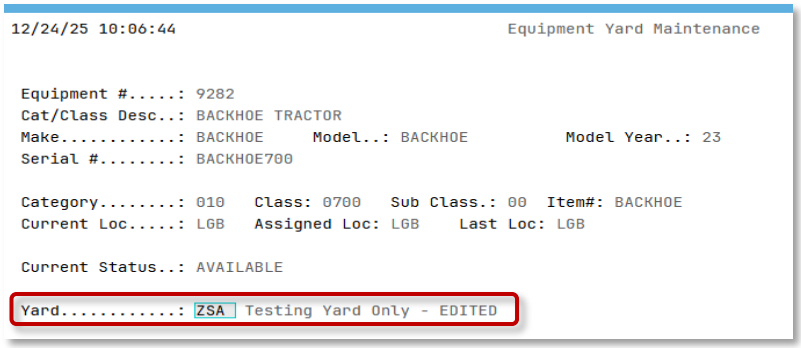
3. If you know the yard you would like to assign, you can type in the *Yard* field; otherwise, press F4 to open the **Yard Look-up** pop-up window. **NOTE:** The locations an yards allowed to be selected are based on the current location of the equipment.



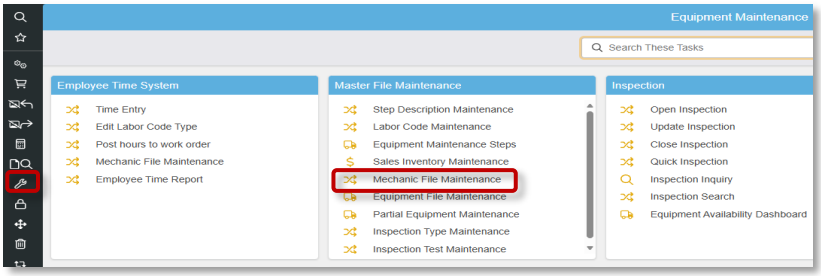
4. Type **1** in the *O* field next to the desired location and press Enter.

a. The **Yard Look-up** pop-up window closes, and you will be returned to the **Equipment Yard Maintenance - Launch** screen.

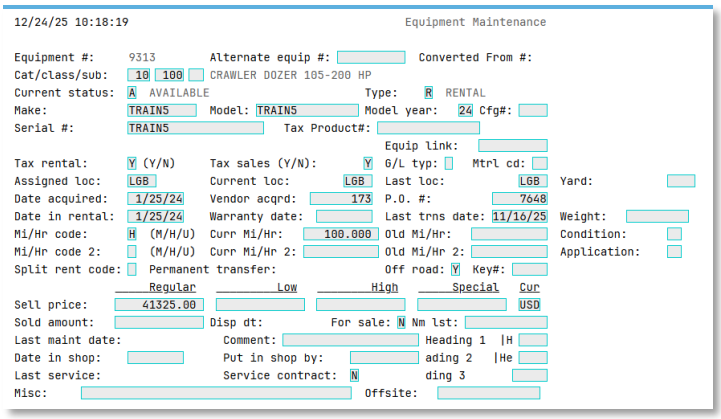
5. To verify the yard saved properly, type in the *Equipment #* and press Enter.
   a. The **Equipment Yard Maintenance - Details** screen opens for the entered equipment and the *Yard* displays as selected.



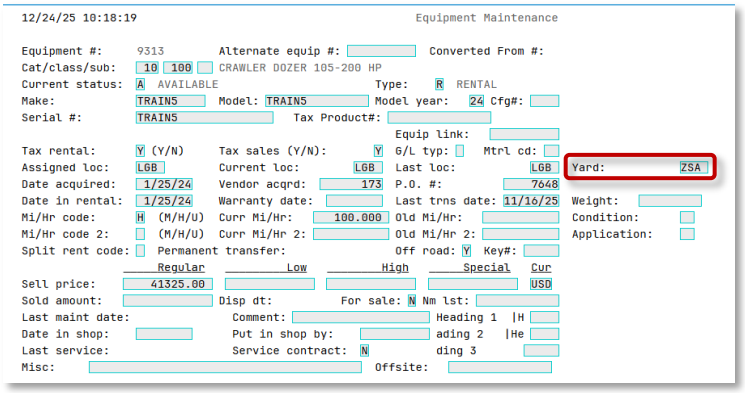
6. To maintain the yard in **Equipment Maintenance**, click on the **Equipment Maintenance** menu option and in the **Master File Maintenance** section, click on **Equipment File Maintenance**.



7. Type in the *Equipment #* and press Enter. **NOTE:** You can also use F4 to search if necessary.
   a. The **Equipment Maintenance - Details** screen opens for the selected piece of equipment.



8. Type in the *Yard* field or with the cursor in the field, press F4 to search and select the desired location.



9. Review the changes and press Enter to update the equipment record.
10. The **Equipment Maintenance - Details** screen closes and the **Equipment Maintenance - Launch** screen displays.

Reference Glossary

Field Definitions for Tasks

Yard Location Maintenance

- *Yard* – Code assigned to the yard. This field can contain up to four characters.
- *Yard Description* – Displays the description of the yard.
- *Address 1* – Displays the first line of the street address for the yard.
- *City* – Displays the city where the yard is located.
- *State* - Displays the two-letter abbreviation for the state where the yard is located.
- *Number Location* – Displays the number of locations assigned to the yard.
- *Status* – Displays the current stats for the yard. Valid entries include:
    - A – Active
    - D - Deactivate