



Tips for Implementing ToolWatch

TTSE003
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Purpose:

This document outlines the recommended steps for implementing ToolWatch and is intended for new users who have never tracked their tools and equipment.

Sequence Overview:

1. Study your ToolWatch User's Guide.
2. Install the ToolWatch software.
3. Identify the types of tools and equipment that you will track and conceptually organize these into general categories.
4. Begin data entry in ToolWatch: Company Setup, Workstation Setup, Lists, & Product Catalog by following the online Setup Checklist.
5. Organize your tool storage area (stockpoint) – get it *in order*.
6. Number and label all tools to be tracked that are already located at your stockpoint.
7. Start tracking tools as they come and go from your stockpoint.
8. Number and label all tools to be tracked in the field.

Tips:

- Consider all the tools and equipment that you want to track. Conceptually group these into logical categories like generators, grinders, drills, etc. Other examples of categories could be communication equipment or office equipment. Dividing your tools and equipment into categories allows you to search for, and generate reports on specific groups of tools, instead of everything all at once. Categories in ToolWatch tend to be broad instead of specific. Compile your categories into a list that you will use later.
- Begin data entry in ToolWatch. Consult your user guide for more information on the following, and then complete these tasks in order. 1) Lists. Add yourself and all those who may receive tools in ToolWatch to the Employee List. List all of the places that you may wish to assign tools, including your Stockpoint, in your Locations list. Start your Categories list. 2) Complete Company and Workstation Setup. 3) Begin establishing your Product Catalog. Each of these is a master record for the tools you intend to track. These records are used like templates to quickly and easily create the actual tool records later.
- Organize your Stockpoint. Whatever you decide to call it – Warehouse, Shop, Tool Room or Tool Crib – you will have much greater success if your Stockpoint is in order. Clean up your tools. Organize them neatly on shelves, and in bins. Establish a numbering scheme for your stockpoint for easy retrieval and storage of tools in the correct location within the Stockpoint (like a filing system). Your Stockpoint numbering system will be used later when you begin creating actual tool records.
- Start numbering and labeling your tools with ToolWatch bar code labels. Each tool should have a number etched on it and may have a bar code applied to it as well. The tool numbering system should be simple: start with tool number 1 and let the system take it from there. For bar code numbering, begin by using the number of the first bar code on the sheet of labels that came with your system. When you etch the first number on a tool, create a corresponding tool record inside of ToolWatch by starting in the Product Catalog. Consult your User Guide for more information about different ways to create tool records.

**TOOLWATCH TIPS**

- Once you've got your Stockpoint in order with all tools numbered and labeled with corresponding tool records in ToolWatch, you're ready to start tracking your tools. Create Transfer Tickets in order to reassign tools from the Stockpoint to Employees or Locations. As previously untracked tools come in from the field, do NOT shelve them unless a tool record is created in the system. As time permits, you can take your portable ToolWatch Dolphin into the field to begin creating tool records there.