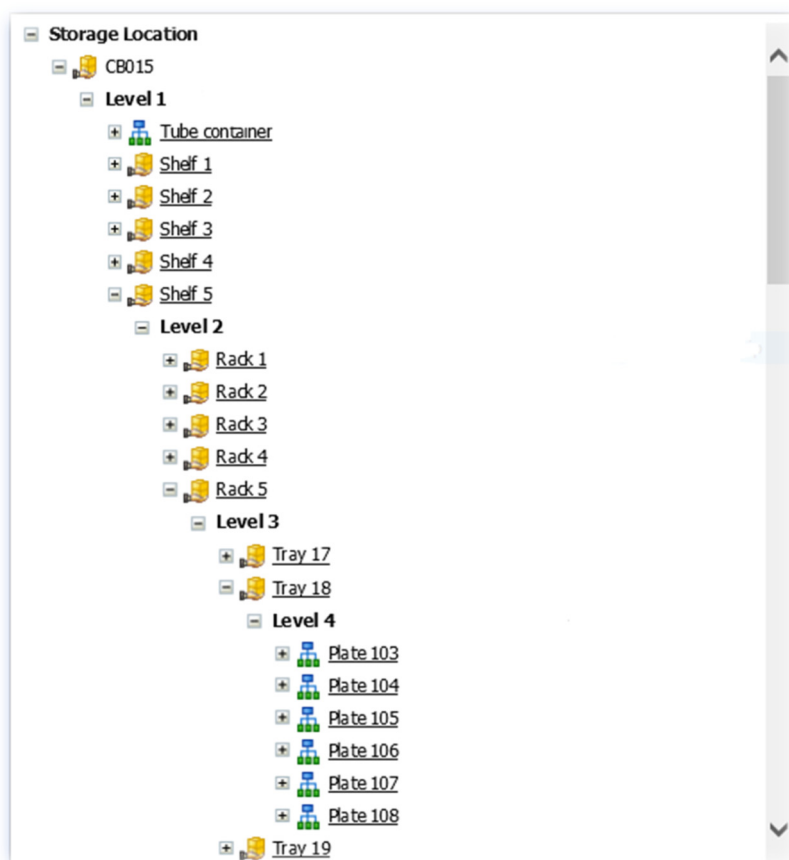## STORAGE LOCATION MANAGEMENT

Storage administrators are able to add, remove and edit Storage Locations and Sub Locations in order to configure Achiever to match their working environment. Storage Locations must also be linked to Collections in order to allow Collection Staff to assign storage to Samples within the registered Storage Locations and Sub Locations.

Administrators are able to perform the following:

- Add/remove storage locations and sub-locations
- Assign/remove storage locations to/from collections
- Assign/remove storage administrators
- Enforce capacity limits to storage sub-locations
- View graphical representations of fixed-capacity storage sub-locations

NB

- Samples not allocated to storage are classed as checked out
- Storage sub-locations may represent a particular plate, tray, box, or shelf.
- Storage sub-locations are assigned to a storage location which may represent a fridge, freezer, locker or cupboard.
- Mid-locations may optionally be used to create a hierarchy of levels between a storage location and sub location. These could represent shelf, rack or tray for example, as shown in the image below. Note that 'Tube Container' and 'Plate 103'-'Plate 108' represent sub locations
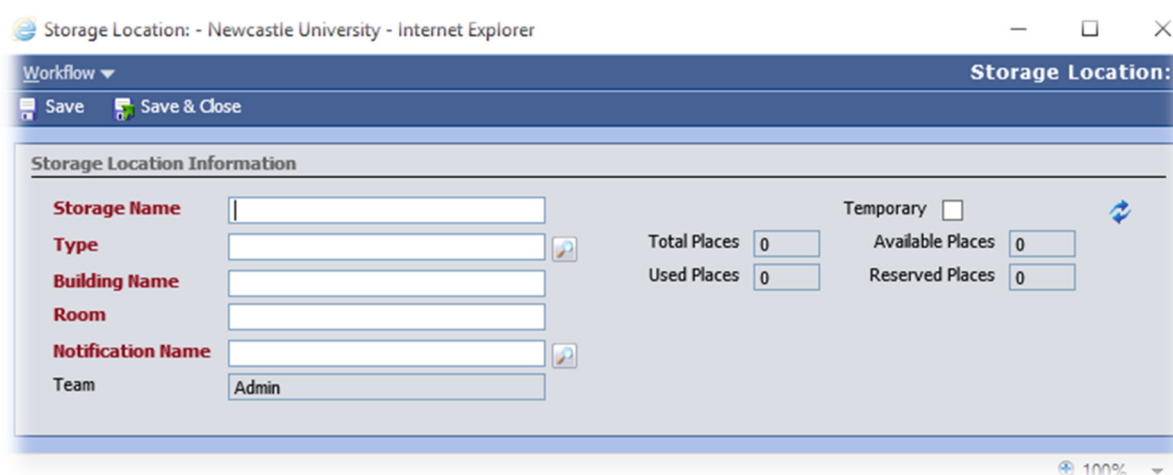

- For basic storage requirements, name a single generic sub-location with the same name as the storage location, ie Freezer 1/Freezer 1 and ensure the sub location has no capacity limit.

- Storage sub-locations may have a fixed capacity and storage 'width' or may be classed as unlimited capacity.
- Storage locations may be classed as temporary storage
- Complex storage locations may have many mid-location levels and it can be easy to create duplicate sub-locations. Always check first or run changes through a primary storage administrator.

ADDING A NEW STORAGE LOCATION

Any user can create a new storage location, and will automatically be assigned as an administrator for that location. In order for another user to edit the storage location they must be added as a storage administrator

- Navigate to the Storage Management [Storage Management] functional menu
- Select the Storage Management area menu to open the storage management records grid
- Select the Insert New Storage Location workflow

- Enter mandatory fields, check building/room name spellings against existing records
- Notification Name is the person responsible for the storage location and may be used in reporting
- Flagging a storage location as temporary will ensure samples held within are flagged through the applicable home screen and collection grids
- Current user will be added to list of administrators by default, add team members if applicable
- *NB* Figures for total places/available places will be skewed when the storage location contains sub locations with no capacity limit, as internally they are represented as containing 9999 spaces

MANAGE STORAGE ADMINISTRATORS

Adding a storage administrator will allow another user access to edit/delete the storage location and add other storage administrators

- Within a storage location record, open the Administrators option from the navigation menu
- To add an administrator, follow the Manage Storage Admin workflow from the records grid
- To withdraw the administrator status without totally removing the record, follow the status hyperlink from the records grid and change the status to Withdrawn

MANAGE COLLECTIONS

Storage locations must be linked to Collections to allow samples to be moved into the storage

- Within a storage location record, open the Collections option from the navigation menu
- To add a collection, follow the Add to Collection workflow

- To remove a collection, select the appropriate row in the records grid and follow the Remove from Collection workflow
- **NB** Removing the link to a collection does not affect existing sample records which will continue to be associated with that location

ADDING STORAGE SUB-LOCATIONS

- Within a storage location record, select the 'Edit Storage Location' Workflow available from the top-left workflow menu
- A hierarchical view of the storage location will be shown, showing any existing sub locations or mid locations at level 1 (the top level, linked directly to the storage location)
- The storage location and mid locations are represented by 📦. Sub locations are represented by 🖧
- At each level, a storage sub location (may contain samples) or mid location (may contain other sub locations or another mid location) may be created
- Select the appropriate link (Add Mid-Location(s) or Add Sub-Locations) to create a new record
- In either case, multiple records can be created using an alphabetic or numeric suffix and choosing an amount greater than 1
- **NB** The suffix is appended directly onto the name supplied, add a trailing space if required
- It is best practice to name sub locations uniquely within the storage location, rather than having Shelf 1/Box 1, Shelf 2/Box 1
- A sub location may have fixed capacity if a width is entered – if the width is left blank the capacity value is ignored and the sub location will be created with no capacity limit

EDIT STORAGE SUB LOCATION

Administrators can edit sub locations in a variety of ways, however certain workflows become disabled when a storage location contains samples

- Sub location name can be altered by administrators when opening a storage sub-location
- Setting or removing storage capacity limit workflows existing via top-left workflow menu within a storage location record
- Capacity limits may not be removed if the sub location contains samples

MOVING SUB LOCATIONS

It is possible to move sub locations to different mid levels, or to a different storage location completely. More information is available in the training guide *Moving Storage Sub Locations*.

BULK STORAGE CONFIGURATION

When creating new Storage Locations from scratch, it is possible to bulk upload mid location and sub location configuration, along with capacity details. Please complete the storage location configuration worksheet and submit a service request via NUService.