

# Chapter 6:

# Check In/Out

## Objectives

After completing this section, you will be able to:

- ☐ Check In/Out Assets
- ☐ Check In/Out Serialized Inventory

## Contents

Check In/Out.....	178
Checking Out an Asset or Serialized Inventory Item.....	178
Checking In an Asset or Serialized Inventory Item.....	181
How to View Transaction Receipts .....	185
Transactions .....	185

## Table of Figures

Figure 1 Register - Scan Contact Barcode Portion.....	178
Figure 2 Check In/Out Register .....	178
Figure 3 Check Out Serialized Inventory Items List.....	179
Figure 4 Check Out Assets List .....	179
Figure 5 Asset LookUp Screen.....	179
Figure 6 Check Out Items Detail Screen .....	180
Figure 7 Check Out Receipt .....	181
Figure 8 Receipt LookUp .....	181
Figure 9 Check In Items List.....	182
Figure 10 Check In Items List with Selections .....	182
Figure 11 Set Condition for All Assets Screen.....	183
Figure 12 Check In Item Detail Screen.....	183
Figure 13 Check In/Out Screen on Asset Detail Screen.....	184
Figure 14 Check In/Out Screen on Serial Number Detail Screen.....	184
Figure 15 Check In/Out Transactions Receipt LookUp Screen .....	185
Figure 16 Asset Check In/Out Transactions Viewer .....	185
Figure 17 Serial Number Check In/Out Transactions Viewer .....	186
Figure 18 Check In/Out Transaction Data Detail Screen.....	186



## Check In/Out

This module allows for the tracking of Assets and Serialized Inventory Items that have been assigned to specific Users. Provided the appropriate permission has been set up, Users can do their own Check In/Out as well as for other Users.

### Checking Out an Asset or Serialized Inventory Item

To check out an Asset or Item, log in to the Register screen with the barcode value (may be identical to the User ID if Contact is a User of TME) of the Contact who is to receive the item.

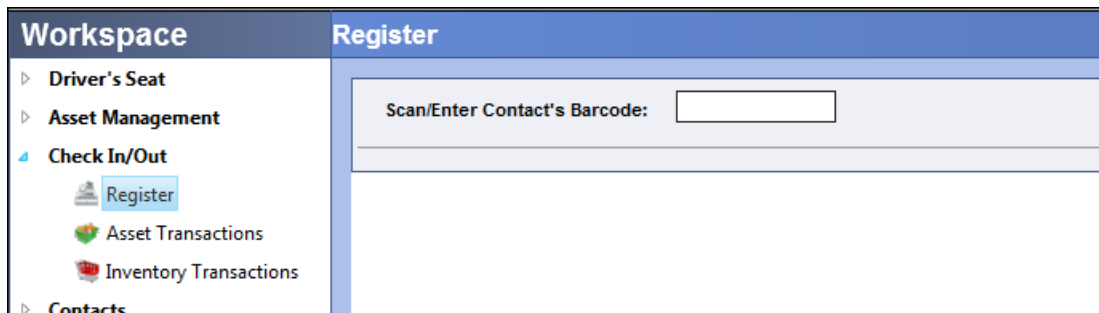


Figure 1 Register - Scan Contact Barcode Portion

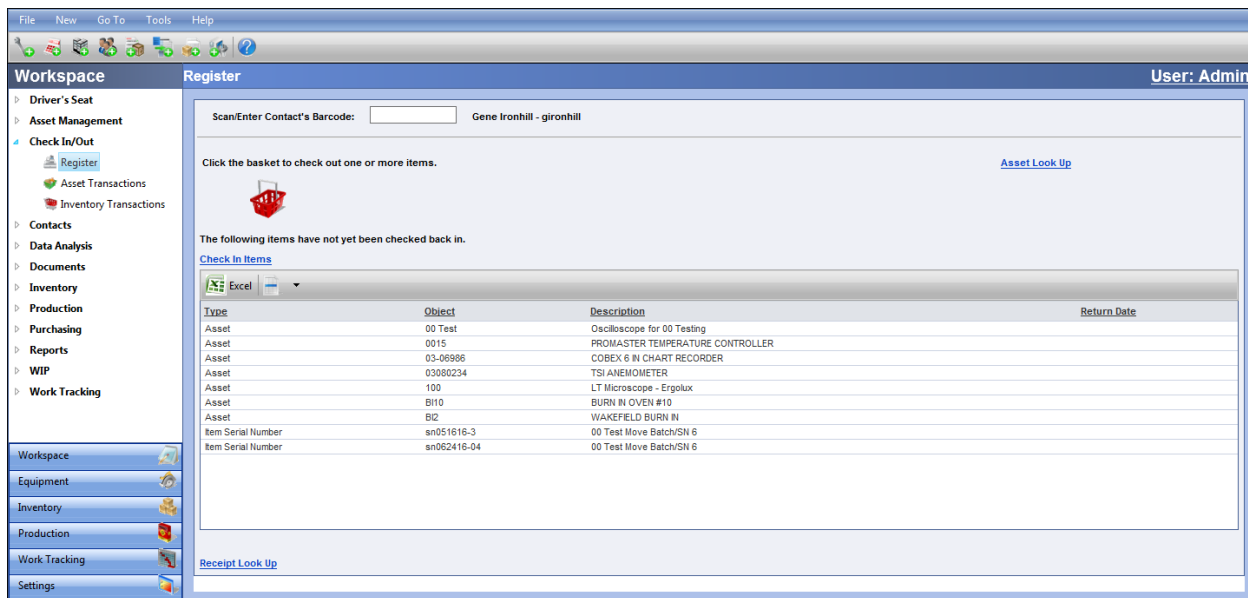



Figure 2 Check In/Out Register

Click on the . Type in the Asset barcode value or the Inventory Item Serial Number and hit the Enter button (or scan the barcode). Multiple items may be checked out at one time, however, Assets and Inventory Items cannot be checked out in the same transaction. User will need to conduct separate transactions.

### Check Out Items

**Transaction Info:**  
Date/Time: 11/30/2016 11:30:55 AM [Asset Look Up](#)

Be sure the cursor is in the following field and scan or type an Asset or Serial Number barcode and press the enter key.

Scan Barcode:

Serial Number	Condition	Est. Return Date
sn051616-8	Rating 3	12/1/2016
sn062416-03	Rating 4	12/1/2016

Figure 3 Check Out Serialized Inventory Items List

### Check Out Items

**Transaction Info:**  
Date/Time: 11/30/2016 11:34:12 AM [Asset Look Up](#)  
Estimated Cost: \$225.00

Be sure the cursor is in the following field and scan or type an Asset or Serial Number barcode and press the enter key.

Scan Barcode:

Asset ID	Asset Description	Condition	Est. Return Date	Rate	Interval	Est Cost
Bike 1	Ten speed bike	Good	12/1/2016	13	Hour	195
Tool 1		Good	12/1/2016	2	Hour	30

Figure 4 Check Out Assets List

Double-click on the record in order to change the Condition of the object, select a new return date or enter comments.

The Asset Look Up link in the top right corner (also available on the main Check In/Out screen) will show all Assets set up for Check In/Out and whether they are currently available (status is In or blank) or checked out (status is Out).

Asset ID	Description	In / Out	Last Out To	Out Date	Exp. Ret. Date
0015	PROMASTER TEMPERATURE CONTROLLER	Out	Gene Ironhill	10/5/2016 04:05:33 PM	10/6/2016 12:00:00 AM
0016	Testing new asset	In	Gene Ironhill	3/11/2014 10:07:45 AM	3/12/2014 12:00:00 AM
00K064	TORQUE WRENCH	Out	Jan McCollum	10/4/2016 12:30:14 PM	10/5/2016 12:00:00 AM
03-06985	COBEX 6 IN CHART RECORDER	Out	Gamal Balady	10/4/2016 12:31:19 PM	10/5/2016 12:00:00 AM
03-06986	COBEX 6 IN CHART RECORDER	Out	Gene Ironhill	10/7/2016 02:27:03 PM	10/28/2016 12:00:00 AM

Figure 5 Asset LookUp Screen

**TME -- Webpage Dialog**

**Check Out Items**

Transaction Info:

Date/Time: 11/30/2016 11:43:29 AM [Asset Look Up](#)

Estimated Cost: \$225.00

Be sure the cursor is in the following field and scan or type an Asset or Serial Number barcode and press the enter key.

Scan Barcode:

Asset ID	Asset Description	Condition	Est. Return
Bike 1	Ten speed bike	Good	12/1/2016
Tool 1		Good	12/1/2016

Help

**TME -- Webpage Dialog**

**Check Out Items**

Asset ID: Bike 1

Rate: \$13.00 / Hour

Condition:

Est. Return Date:

Est. Cost: \$195.00

Comments:

Help Submit

Figure 6 Check Out Items Detail Screen





Rates by the Hour/Day for Assets are set up on the Asset Detail screen. Inventory Items do not have rental rates.




The values for the Condition drop-down lists are populated by the TME Administrator or designated personnel via Tools \ Options (see Chapter 10: Settings).

Click  to save the selections and return to the Check Out Screen. If there is a rental fee associated with the Asset, an estimated cost based on the expected return date will be listed.

To remove an object from the Check Out List, click  to the right. When ready to complete the Check Out, click  to complete the transaction. A receipt will immediately appear for printing. The objects will also be listed on the viewer on the Register screen.



**Check Out Transaction Receipt: 187**



---


Checked Out:
Checked Out By: Admin
Checked Out For: Gene Ironhill-User

---

Asset ID	Condition Out	Scheduled Return Date	Rate	Est. Cost
146	Shipped	1/17/2013 (Midnight)	\$0.00/Hour	
139B	Laser Engraving – Complete	1/15/2013 (Midnight)	\$0.00/Hour	
<b>Total:</b>				<b>\$0.00</b>

**Figure 7 Check Out Receipt**

The Receipt LookUp link in the bottom left corner of the main screen provides a list of receipts (Both Check Out which are listed as Open and Check In which are listed as Closed). Double-clicking on a receipt record will open the receipt itself (for re-printing, reviewing, etc.).

Receipt Look Up				
				
Date/Time	Trans#	Checked	Est/Act Cost	
8/13/2013 12:23:57 PM	100	Open	56	
8/13/2013 12:25:30 PM	101	Open	56	
8/13/2013 12:26:16 PM	102	Closed	8	
8/13/2013 12:27:18 PM	103	Closed	0	
8/13/2013 12:27:36 PM	104	Open	28	
10/1/2013 03:15:50 PM	105	Open	206.5	
10/1/2013 03:16:21 PM	106	Closed	126	
11/1/2013 04:55:30 PM	107	Open	28	
				<input type="button" value="OK"/>

**Figure 8 Receipt LookUp**

### Exercise 14:



Check out an Asset you have entered into the system for two days.

## Checking In an Asset or Serialized Inventory Item

To check an object back in, click on [Check In Items](#).

### Check In Items

**Transaction Info:**

Date/Time: 11/30/2016 11:56:42 AM
Cost: \$0.00
[Set Condition for All Assets](#)

Locale: [Click here to select a locale.](#)
[Set Condition for All Items](#)

Be sure the cursor is in the following field and scan or type an Asset or Serial Number barcode and press the enter key.

Scan Barcode: 
☐ All

Object	Description	Condition Out	Condition In	Exp. Return Date	Act. Return Date	Rate	Interval	Cost	Return
00 Test	00 Test	Good		7/15/2016		3.5	Hour		<input type="checkbox"/>
0015	0015	Poor		10/6/2016		0	Hour		<input type="checkbox"/>
03-06986	03-06986	Good		10/28/2016		0	Hour		<input type="checkbox"/>
03080234	03080234	Good		11/20/2016		0	Hour		<input type="checkbox"/>
100	100	Good		10/16/2016		0	Hour		<input type="checkbox"/>
BI10	BI10	Good		11/29/2016		0	Hour		<input type="checkbox"/>
BI2	BI2	Good		11/29/2016		0	Hour		<input type="checkbox"/>
Bike 1	Bike 1	Good		12/1/2016		13	Hour		<input type="checkbox"/>
sn051616-3	00 Test Move Batch/SN 6			11/23/2016					<input type="checkbox"/>
sn062416-04	00 Test Move Batch/SN 6			11/23/2016					<input type="checkbox"/>
Tool 1	Tool 1	Good		12/1/2016		2	Hour		<input type="checkbox"/>

Figure 9 Check In Items List

Select the Locale to which the items are to be returned by clicking on

[Click here to select a locale.](#)

Click the checkbox in the Return column corresponding to the item to be checked in or ☐ All to select all of the items. The actual costs (for Assets as applicable) and return dates are filled in.

TME -- Webpage Dialog

http://demo.tmegateway.com/TME5807/Module/CheckInOut/Register/ciCheckIn.aspx?UID=08397f14-e3ac-4b67-b05d-57d77658e5

### Check In Items

**Transaction Info:**

Date/Time: 1/14/2013 6:18:39 PM
Cost: \$0.00

Locale: [C01B01FL01RM010IR1](#)

Be sure the cursor is in the following field and scan or type an Asset barcode and press the enter key.

Asset Barcode: 
☐ All

Asset ID	Condition Out	Condition In	Exp. Return Date	Act. Return Date	Rate	Interval	Cost	Return
100	Good		1/12/2013		0	Hour		<input type="checkbox"/>
138B	Shipped		1/15/2013		0	Hour		<input type="checkbox"/>
139B	Laser Engraving -- Complete		1/15/2013		0	Hour		<input type="checkbox"/>
146	Shipped		1/17/2013		0	Hour		<input type="checkbox"/>

Figure 10 Check In Items List with Selections



To set the return Condition for all selected Assets, click on the Set Condition for All Assets link. Select the Condition from the drop-down list and click Submit. Use the Set Condition for All Items link to do the same for the selected Serialized Inventory Items.

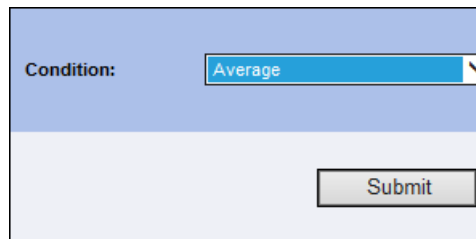
A screenshot of a web form titled "Set Condition for All Assets". It features a label "Condition:" followed by a blue drop-down menu currently showing "Average". Below the menu is a grey "Submit" button.

Figure 11 Set Condition for All Assets Screen

To change the condition (or Return Date) on a record by record basis, double-click on the record. The Check In Details screen appears.

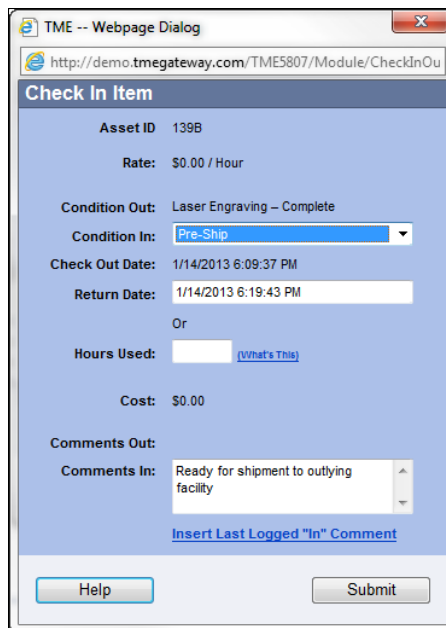
A screenshot of a web browser window titled "TME -- Webpage Dialog" showing the "Check In Item" screen. The URL is "http://demo.tmegateway.com/TME5807/Module/CheckInOu". The form contains the following fields: "Asset ID" (139B), "Rate" (\$0.00 / Hour), "Condition Out" (Laser Engraving - Complete), "Condition In" (Pre-Ship), "Check Out Date" (1/14/2013 6:09:37 PM), "Return Date" (1/14/2013 6:19:43 PM), "Or" (text), "Hours Used" (empty field with a "(What's This)" link), "Cost" (\$0.00), "Comments Out" (empty), and "Comments In" (Ready for shipment to outlying facility). At the bottom, there is a blue link "Insert Last Logged 'In' Comment", a grey "Help" button, and a grey "Submit" button.

Figure 12 Check In Item Detail Screen

If appropriate, change the Condition In of the asset using the drop-down menu. The return date/time can be revised provided permission has been granted for that action or the number of Hours Used can be inserted to calculate the Return Date. Add comments as necessary. To view the last comment made upon Checking In this item, Click on [Insert Last Logged "In" Comment](#). The comment will populate the Comments In field and can be re-used for this Check In transaction, edited, or deleted. Click [Submit](#) to return to the Check In screen. Verify changes made.

Click [Submit](#) to complete the Check In. The Check In Transaction Receipt will appear for printing. Close the receipt window and the Item is removed from the Register viewer.

The Check In/Out history of the item can be viewed on its detail screen (Asset or Serial Number) by clicking on the Check In/Out link on the left.

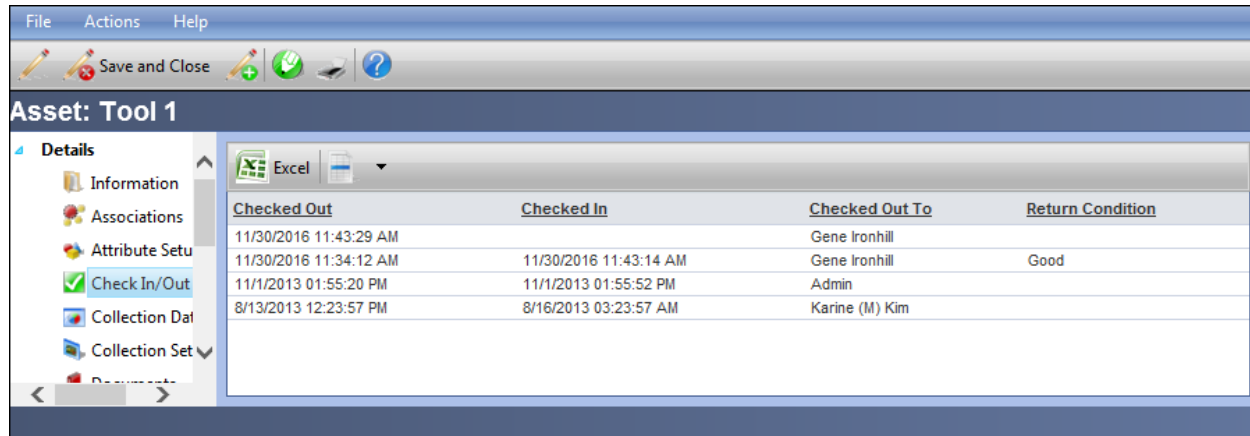


Figure 13 Check In/Out Screen on Asset Detail Screen

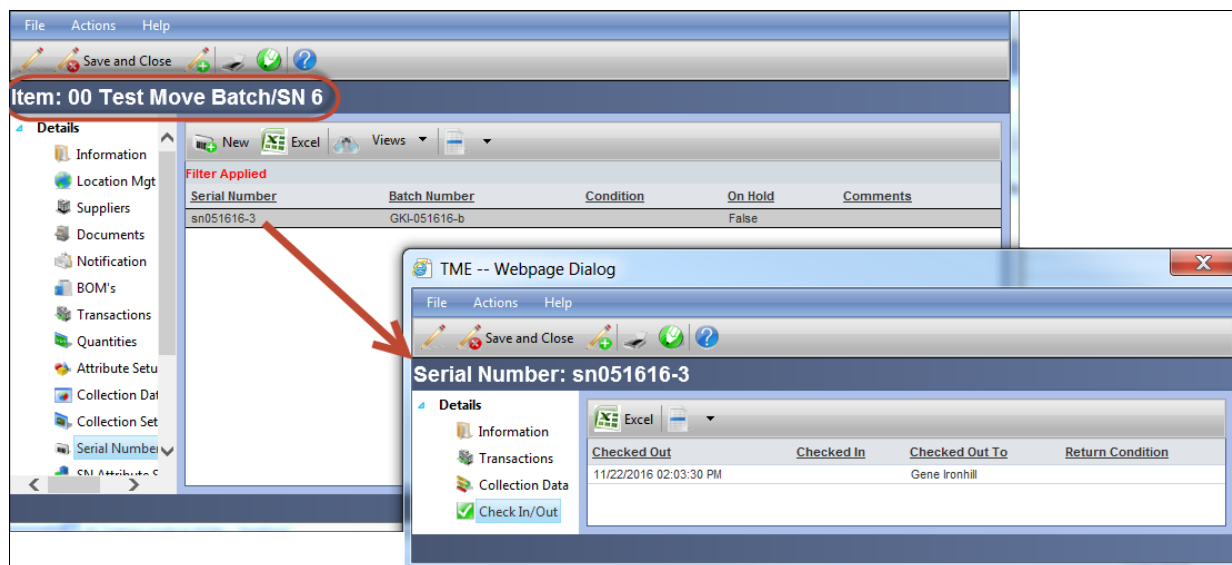


Figure 14 Check In/Out Screen on Serial Number Detail Screen

#### Exercise 15:



Check in the Asset you've just checked out.

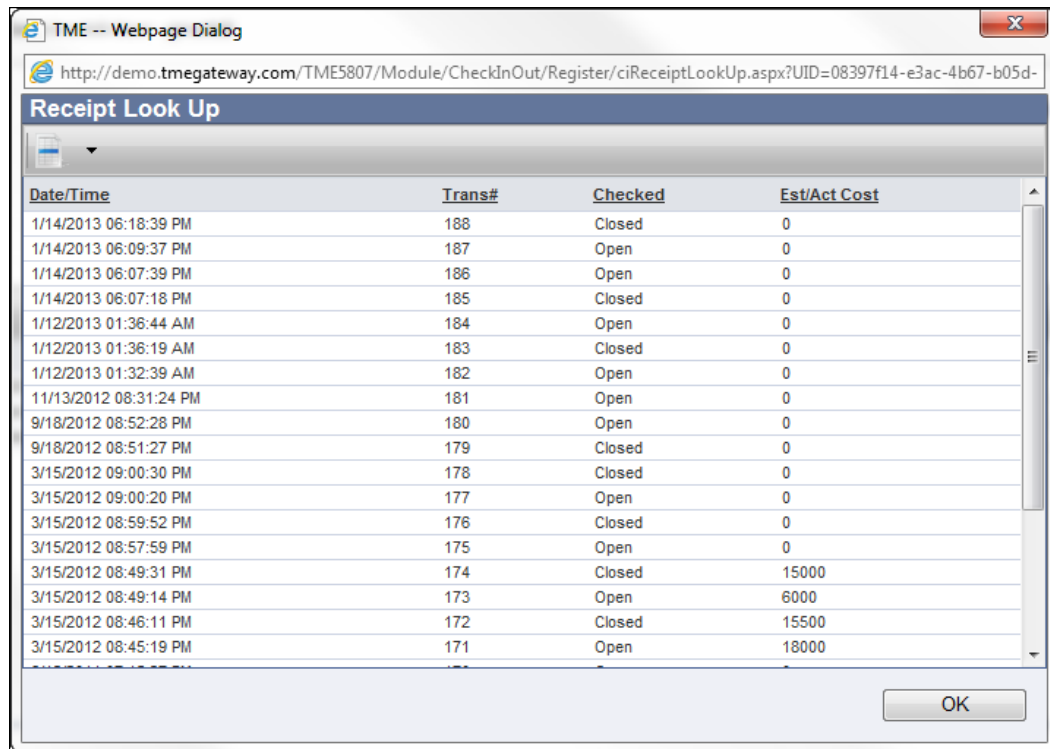
#### Exercise 16:



View the transactions on the Asset Detail screen.

### How to View Transaction Receipts

To view either a Check Out or Check In receipt, click on [Receipt Look Up](#) and double-click on the transaction. The receipt will popup.

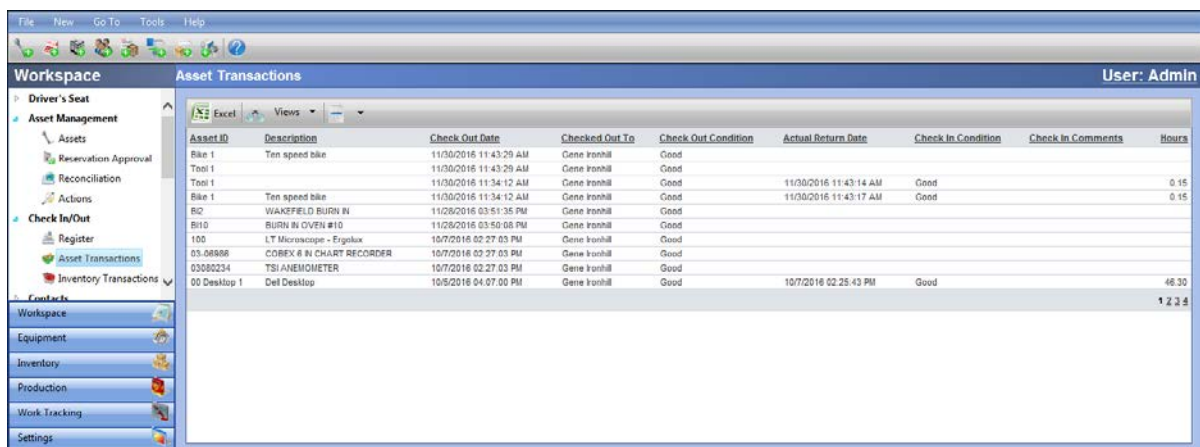


Date/Time	Trans#	Checked	Est/Act Cost
1/14/2013 06:18:39 PM	188	Closed	0
1/14/2013 06:09:37 PM	187	Open	0
1/14/2013 06:07:39 PM	186	Open	0
1/14/2013 06:07:18 PM	185	Closed	0
1/12/2013 01:36:44 AM	184	Open	0
1/12/2013 01:36:19 AM	183	Closed	0
1/12/2013 01:32:39 AM	182	Open	0
11/13/2012 08:31:24 PM	181	Open	0
9/18/2012 08:52:28 PM	180	Open	0
9/18/2012 08:51:27 PM	179	Closed	0
3/15/2012 09:00:30 PM	178	Closed	0
3/15/2012 09:00:20 PM	177	Open	0
3/15/2012 08:59:52 PM	176	Closed	0
3/15/2012 08:57:59 PM	175	Open	0
3/15/2012 08:49:31 PM	174	Closed	15000
3/15/2012 08:49:14 PM	173	Open	6000
3/15/2012 08:46:11 PM	172	Closed	15500
3/15/2012 08:45:19 PM	171	Open	18000

Figure 15 Check In/Out Transactions Receipt LookUp Screen

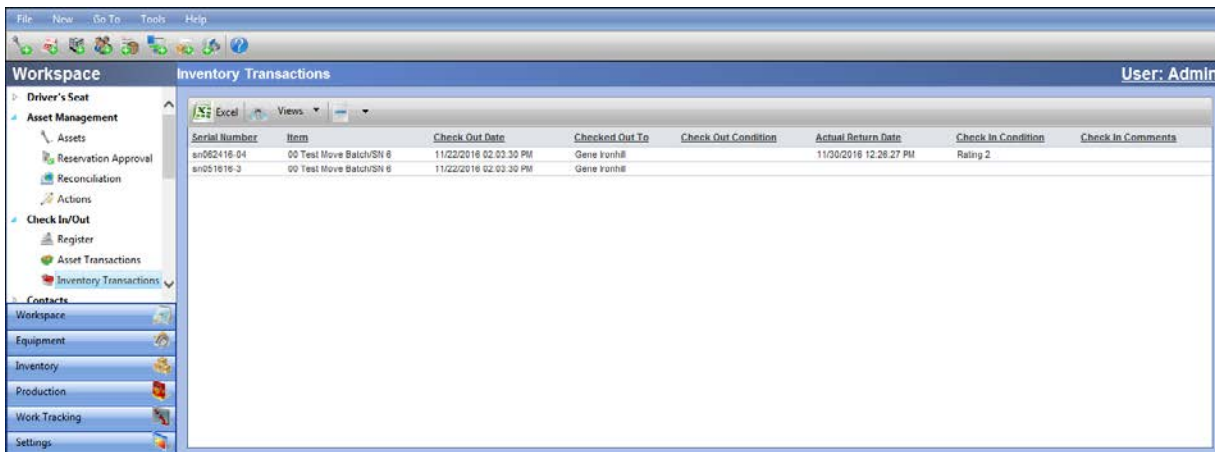
### Transactions

The Asset Transactions and Inventory Transactions Viewers list the Check In/Out entries made into TME.



Asset ID	Description	Check Out Date	Checked Out To	Check Out Condition	Actual Return Date	Check In Condition	Check In Comments	Hours
Bike 1	Ten speed bike	11/30/2016 11:43:29 AM	Gene Ironhill	Good				
Tool 1		11/30/2016 11:43:29 AM	Gene Ironhill	Good				
Tool 1		11/30/2016 11:34:12 AM	Gene Ironhill	Good	11/30/2016 11:43:14 AM	Good		0.15
Bike 1	Ten speed bike	11/30/2016 11:34:12 AM	Gene Ironhill	Good	11/30/2016 11:43:17 AM	Good		0.15
BIC	WAKEFIELD BURN IN	11/26/2016 03:51:35 PM	Gene Ironhill	Good				
B110	BURN IN OVEN #10	11/26/2016 03:50:08 PM	Gene Ironhill	Good				
100	LT Microscope - Ergolux	10/7/2016 02:27:03 PM	Gene Ironhill	Good				
03.08888	COMEX 8 IN CHART RECORDER	10/7/2016 02:27:03 PM	Gene Ironhill	Good				
03080234	TSI ANEMOMETER	10/7/2016 02:27:03 PM	Gene Ironhill	Good				
00 Desktop 1	Del Desktop	10/5/2016 04:07:00 PM	Gene Ironhill	Good	10/7/2016 02:25:43 PM	Good		46.30

Figure 16 Asset Check In/Out Transactions Viewer



Serial Number	Item	Check Out Date	Checked Out To	Check Out Condition	Actual Return Date	Check In Condition	Check In Comments
sn062416-04	00 Test Move Batch/SN 6	11/22/2016 02:03:30 PM	Gene Ironhill		11/30/2016 12:26:27 PM	Rating 2	
sn051616-3	00 Test Move Batch/SN 6	11/22/2016 02:03:30 PM	Gene Ironhill				

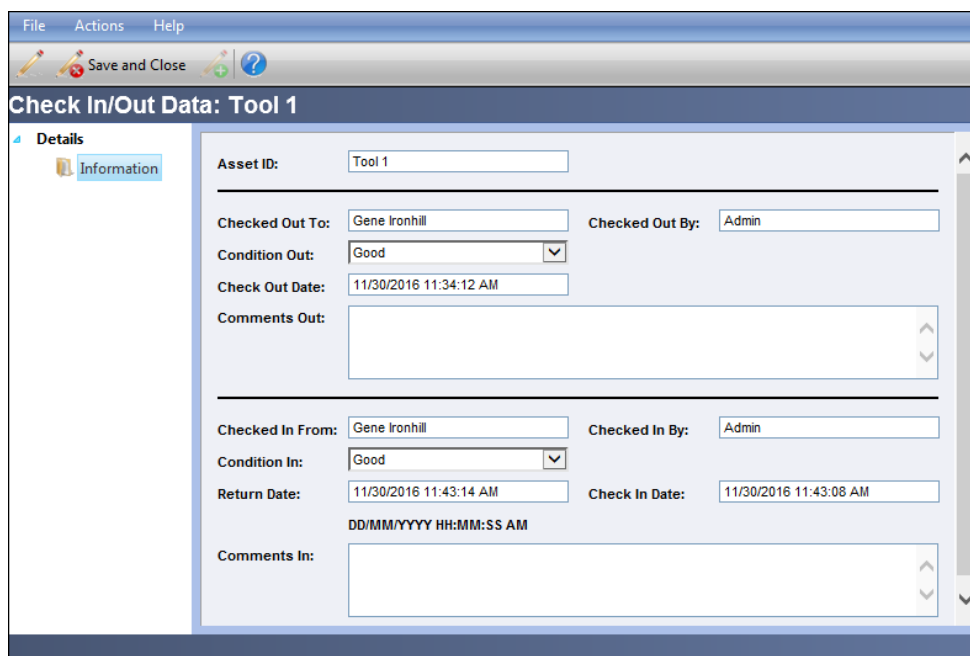
Figure 17 Serial Number Check In/Out Transactions Viewer

## Editing a Transaction

Certain fields on the Asset Transaction can be edited. Double click on a record to open the detail screen. The Condition Out, Comments Out, Condition In, Return Date and Comments In may be changed and the record Saved.



**Rates by the If the Check In Condition for an Asset is changed in the most current transaction, the User will need to update the Condition on the Asset Detail screen as it will not automatically adjust.**



**Check In/Out Data: Tool 1**

**Details**

**Information**

Asset ID: Tool 1

---

Checked Out To: Gene Ironhill Checked Out By: Admin

Condition Out: Good

Check Out Date: 11/30/2016 11:34:12 AM

Comments Out:

---

Checked In From: Gene Ironhill Checked In By: Admin

Condition In: Good

Return Date: 11/30/2016 11:43:14 AM Check In Date: 11/30/2016 11:43:08 AM

DD/MM/YYYY HH:MM:SS AM

Comments In:

Figure 18 Check In/Out Transaction Data Detail Screen



Transactions cannot be deleted. To “remove” a transaction, make the Return Date identical to the check out date making the hours checked out zero. Ensure that the Conditions are identical to the previous transaction.

### Exercise 17:



Edit the Return Date, Condition and Comments of last transaction.

