Chapter 6:

Check In/Out

Objectives

After completing this section, you will be able to:

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

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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.
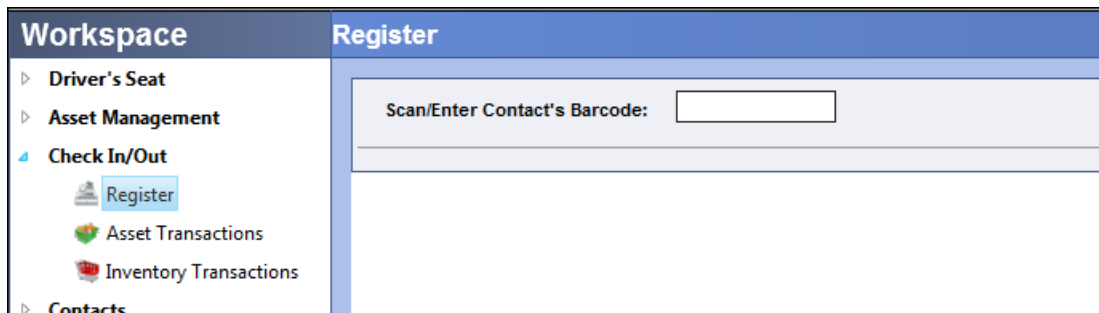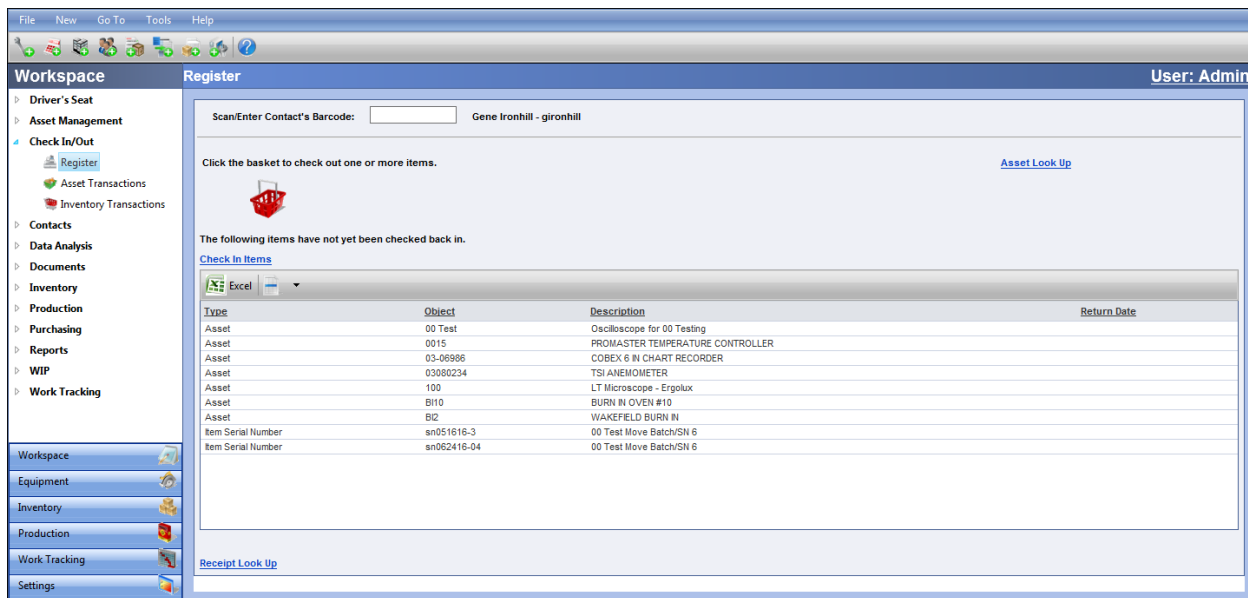

Figure 1 Register - Scan Contact Barcode Portion

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.

Figure 3 Check Out Serialized Inventory Items List

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).

Figure 5 Asset LookUp Screen

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 [Submit] 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 [Submit] to complete the transaction. A receipt will immediately appear for printing. The objects will also be listed on the viewer on the Register screen.

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.).

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**.

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.

Figure 10 Check In Items List with Selections

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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.
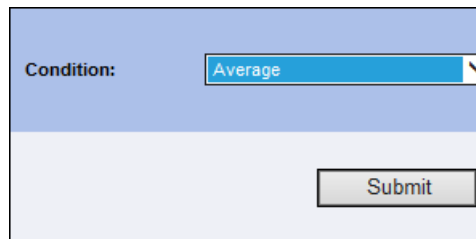

Figure 11 Set Condition for All Assets Screen

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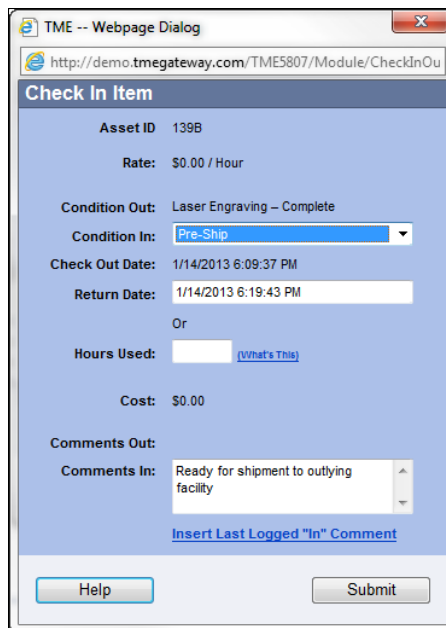

Figure 12 Check In Item Detail Screen

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.
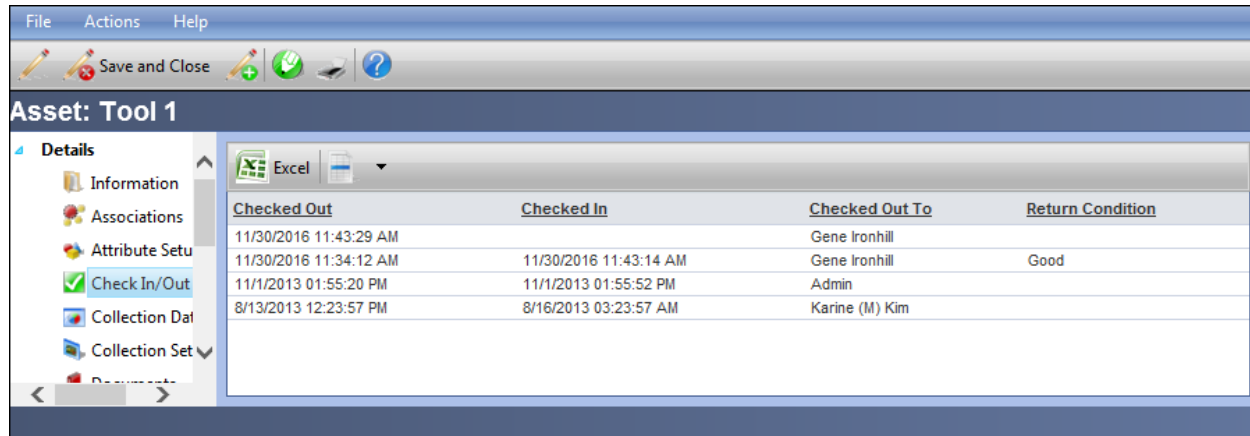

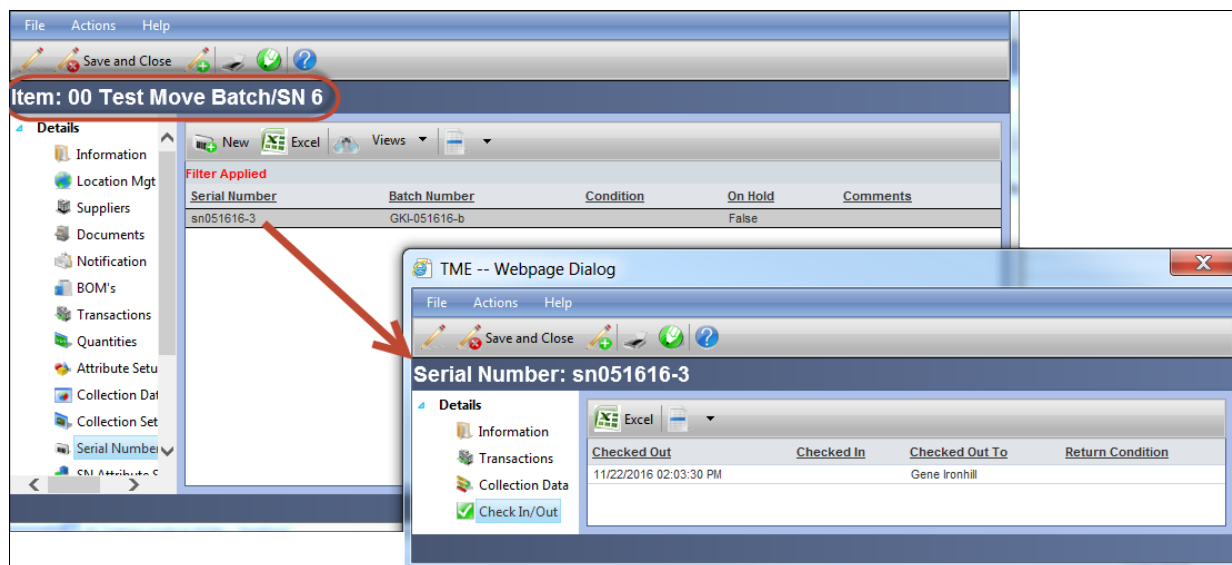**Figure 13 Check In/Out Screen on Asset Detail Screen**

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

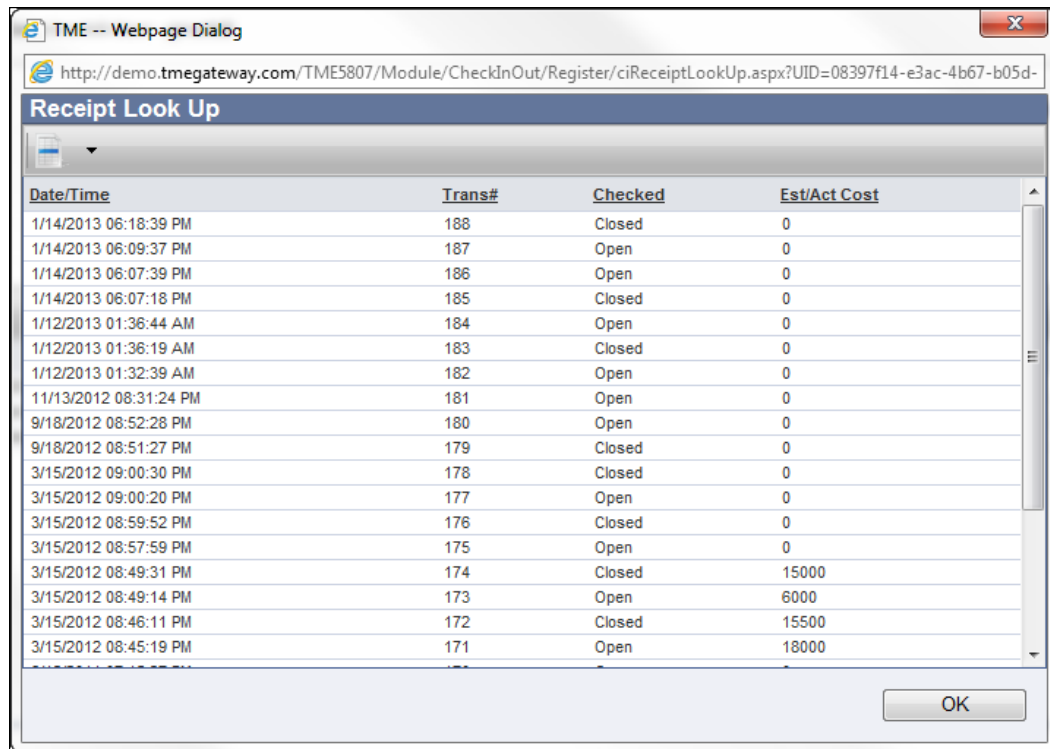**Exercise 15:**

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.
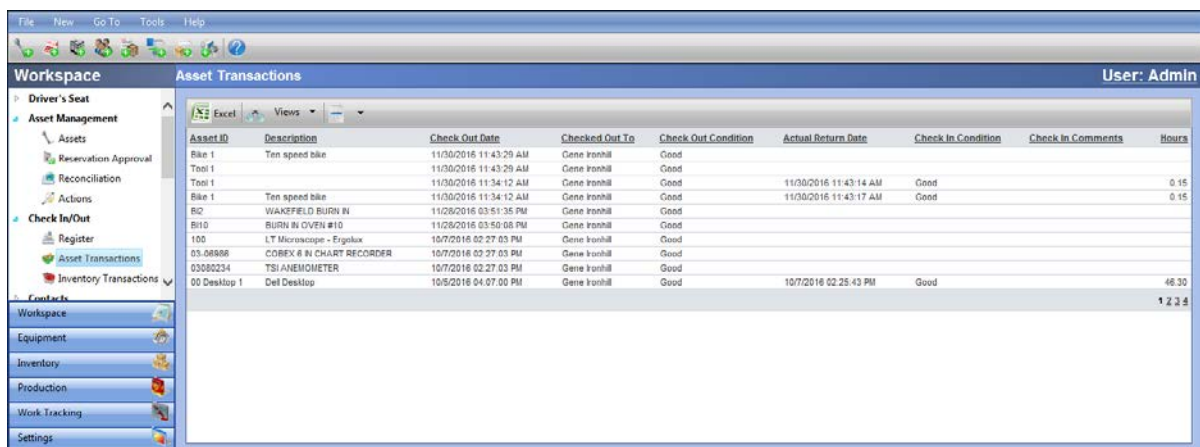

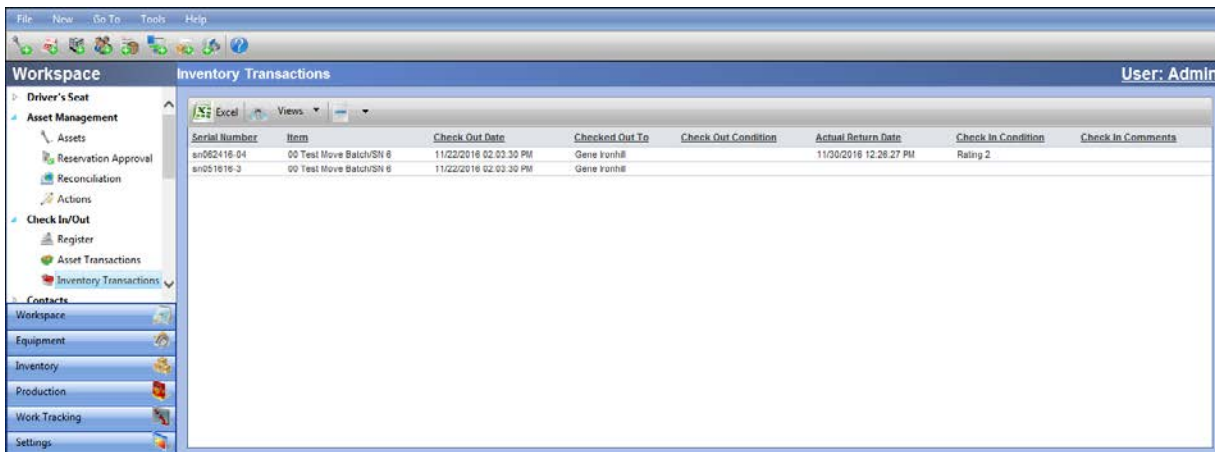**Figure 15 Check In/Out Transactions Receipt LookUp Screen**

Transactions

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

Figure 16 Asset Check In/Out Transactions Viewer
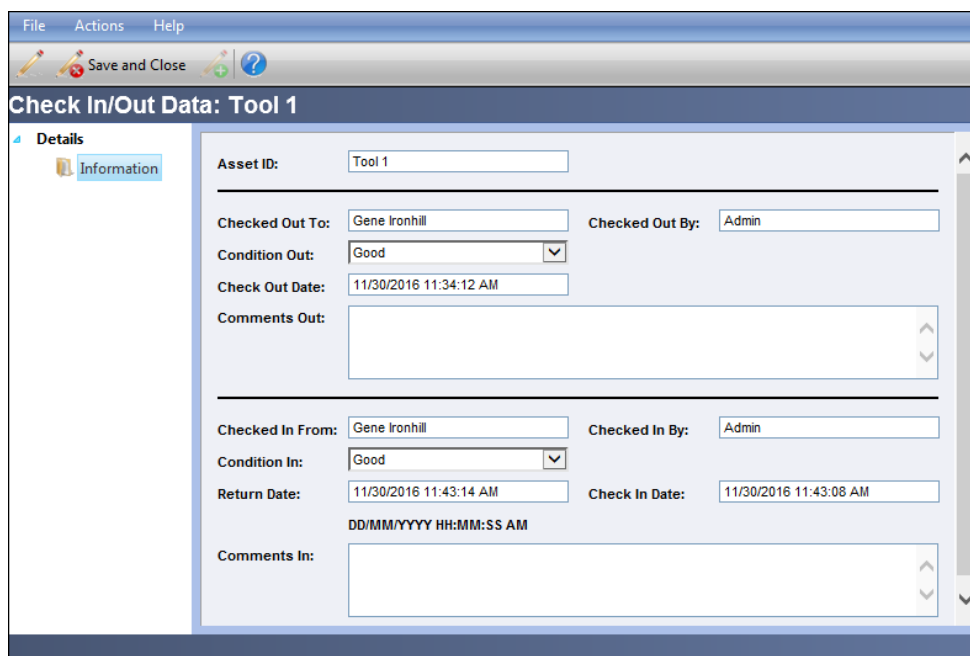
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Figure 17 Serial Number Check In/Out Transactions Viewer

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.**

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.