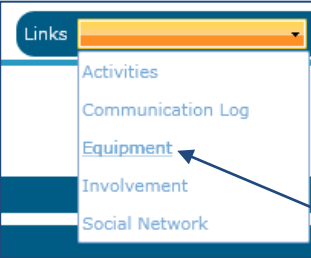# Online CSS | People
Equipment
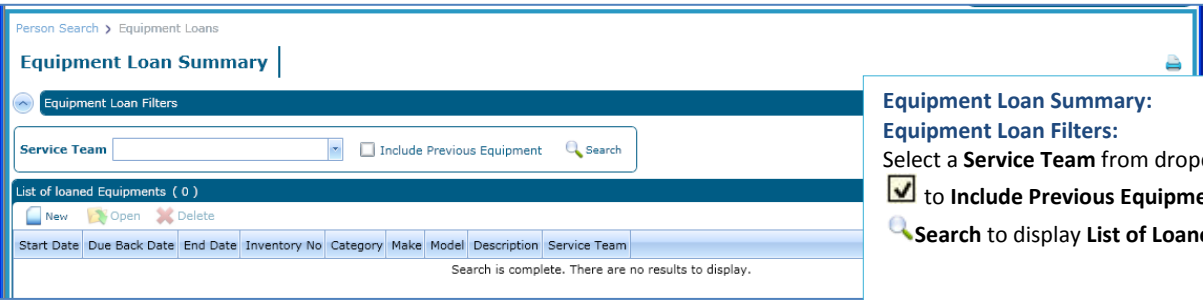
Menu: Person Search | Links | Equipment
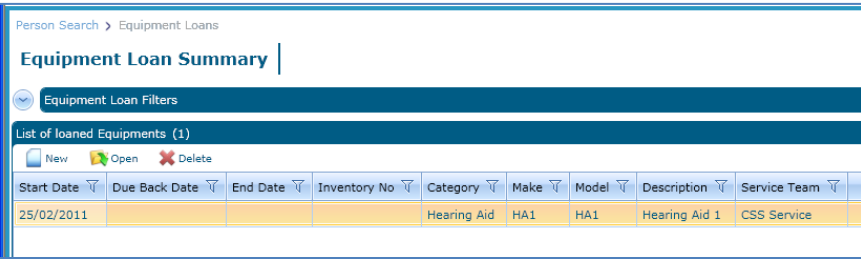
Equipment Loan

Prerequisites:
The loaning of Equipment to a Person or Student is set up in One **v4 | Focus | Equipment Inventory**. Each piece of Equipment must be linked to a **Service Team** and have a **Status** of **In Stock**.

Links
- Activities
- Communication Log
- Equipment
- Involvement
- Social Network

Equipment:
Highlight a Person from the 🔍**Person Search**.
Select **Equipment** from the **Links** dropdown.

Person Search › Equipment Loans

Equipment Loan Summary

Equipment Loan Filters

Service Team [▼] ☐ Include Previous Equipment 🔍 Search

List of loaned Equipments (0)

New | Open | Delete

Start Date	Due Back Date	End Date	Inventory No	Category	Make	Model	Description	Service Team

Search is complete. There are no results to display.

Person Search › Equipment Loans

Equipment Loan Summary

Equipment Loan Filters

List of loaned Equipments (1)

New | Open | Delete

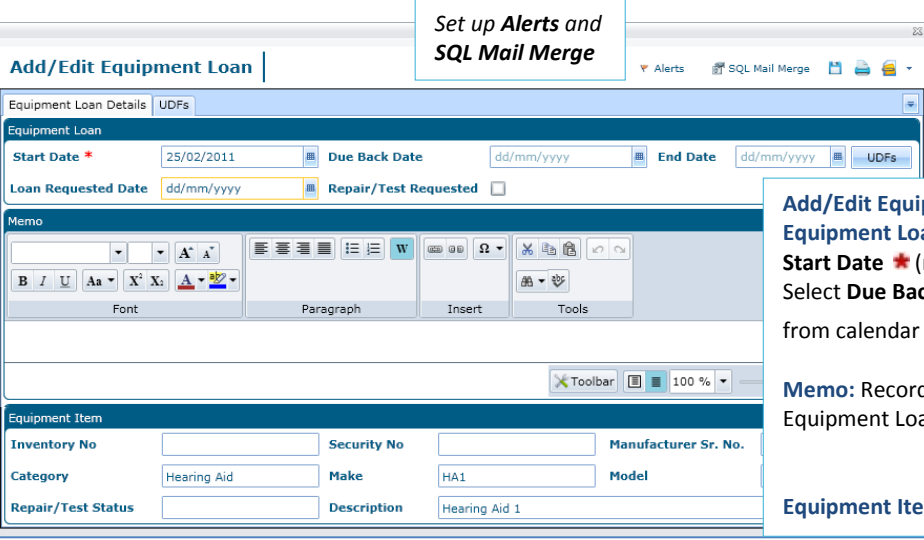| Start Date	Due Back Date	End Date	Inventory No	Category	Make	Model	Description	Service Team
25/02/2011				Hearing Aid	HA1	HA1	Hearing Aid 1	CSS Service

Equipment Loan Summary:
Equipment Loan Filters:
Select a **Service Team** from dropdown.
☑ to **Include Previous Equipment** if required.
🔍**Search** to display **List of Loaned Equipment**.

Highlight a record and 📂 **Open** to **Add/Edit Equipment Loan**. ❌**Delete** returns the item to the 'List of Equipment available for Loan'.
Click 🔲**New** to open the **Inventory Enquiry.**

The ⛛ **Filter** functionality is available (see *RG_OnLine_Common_Filters_Print*)

*Set up **Alerts** and **SQL Mail Merge***

*You can **Save**, **Print** and manage **Linked Documents***

Add/Edit Equipment Loan

⚑ Alerts | 📧 SQL Mail Merge | 📄 🖨 📎 ▾

Equipment Loan Details | UDFs

Equipment Loan

| Start Date * | 25/02/2011 | 🗓 | Due Back Date | dd/mm/yyyy | 🗓 | End Date | dd/mm/yyyy | 🗓 | UDFs |
| Loan Requested Date | dd/mm/yyyy | 🗓 | Repair/Test Requested | ☐ |

Memo

[Font toolbar]
B I U Aa X² X₂ A ✏
Font | Paragraph | Insert | Tools

Toolbar | 100% ▾

Equipment Item

Inventory No		Security No		Manufacturer Sr. No.	
Category	Hearing Aid	Make	HA1	Model	
Repair/Test Status		Description	Hearing Aid 1	

*Click the **UDFs** buttons to view existing UDFs related to panels*

Add/Edit Equipment Loan:
Equipment Loan Details | Equipment Loan:
Start Date ✱ (mandatory) is auto-populated
Select **Due Back Date**, **End Date, Loan Requested Date** from calendar 🗓. ☑ if **Repair/Test Requested**

Memo: Record any relevant information relating to the Equipment Loan (see *RG_OnLine_Common_UDFs_Memo*)

Equipment Item: Read-only information

UDFs tab:
UDFs are set up in v4 | Tools | Administration | UDF Management. If UDFs have not been set up you will receive a message "**No UDFs have been defined.**" (see *RG_OnLine_Common_UDFs_Memo*)

CAPITA

Online CSS | People
Equipment

Menu: Person Search | Links | Equipment | Equipment Loan Summary | New

Equipment Inventory Enquiry

Inventory Enquiry

Equipment Inventory Filters

Service Team	Inventory Number	Security Number	Manufacturer Sr. No.
CSS Service			
Category	**Make**	**Model**	**Repair/Test Status**
			Search

List of Equipment available for loan (4)

Add

Inventory No	Security No	Manufacturer Sr. No.	Category	Make	Model	Status	Repair/Test Status	Gen
			Radio Aid	RA2	RA2	In Stock		No
			Other			In Stock		No

The **Filter** functionality is available (see *RG_OnLine_Common_Filters_Print*)

Inventory Enquiry:
Equipment Inventory Filters: Select relevant filter/s (Service Team is mandatory) and 🔍**Search**

List of Equipment available for Loan:
Highlight item from list and ➕**Add** to **Add/Edit Equipment Loan (Equipment Loan Details)**.

Add/Edit Equipment Loan

▼ Alerts   SQL Mail Merge

Equipment Loan Details | UDFs

Equipment Loan

Start Date *	dd/mm/yyyy	Due Back Date	dd/mm/yyyy	End Date	dd/mm/yyyy	UDFs
Loan Requested Date	dd/mm/yyyy	Repair/Test Requested	☐			

Memo

| B I U | Aa | X² X₂ | A | Font | Paragraph | Insert | Tools |

Toolbar   100 %   Print

Equipment Item

Inventory No	LV1	Security No	LV11	Manufacturer Sr. No.	LV111	UDFs
Category	Hearing Aid	Make		Model		
Repair/Test Status		Description	tetet			

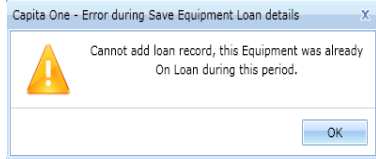Add **Alerts** & **SQL Mail Merge**. *Save, Print* and manage **Linked Documents**

Click on **UDFs** buttons to view existing UDFs related to panels

Equipment Loan Details:
Enter **Start Date** ✱ (mandatory).
Enter other dates if known.
Add **Memo** if required.
Equipment Item fields are read-only.

💾 **Save**. (returns to **Inventory Enquiry**)
❌**Close** to return to **Equipment Loan Summary**.

Person Search > Equipment Loans

Equipment Loan Summary

Equipment Loan Filters

Service Team		☐ Include Previous Equipment	Search

List of loaned Equipments (1) ← *Displays number of items in list*

New   Open   Delete

Start Date	Due Back Date	End Date	Inventory No	Category	Make	Model	Description	Service Team
01/03/2011				Radio Aid	RA2	RA2	Radio Aid 2	CSS Service

Equipment Loan Summary:
🔽 **Expand** Equipment Loan Filters,
🔍**Search** again and item will display in **List of Loaned Equipment**.

Related Reference Guides:
- RG_Online_Common_UDFs_Memo
- RG_Online_Common_Filters_Print

Capita One - Error during Save Equipment Loan details   X

⚠ Cannot add loan record, this Equipment was already On Loan during this period.

OK

Validation:
You cannot overlap loan periods

CAPITA