

# Scan Inventory Items in DirectLine

**Purpose:** This guide will instruct you how to use a bar code scanner, tablet or laptop computer with DirectLine for your physical inventory of tagged assets.

**Audience:** Any DirectLine user involved with physical inventories.

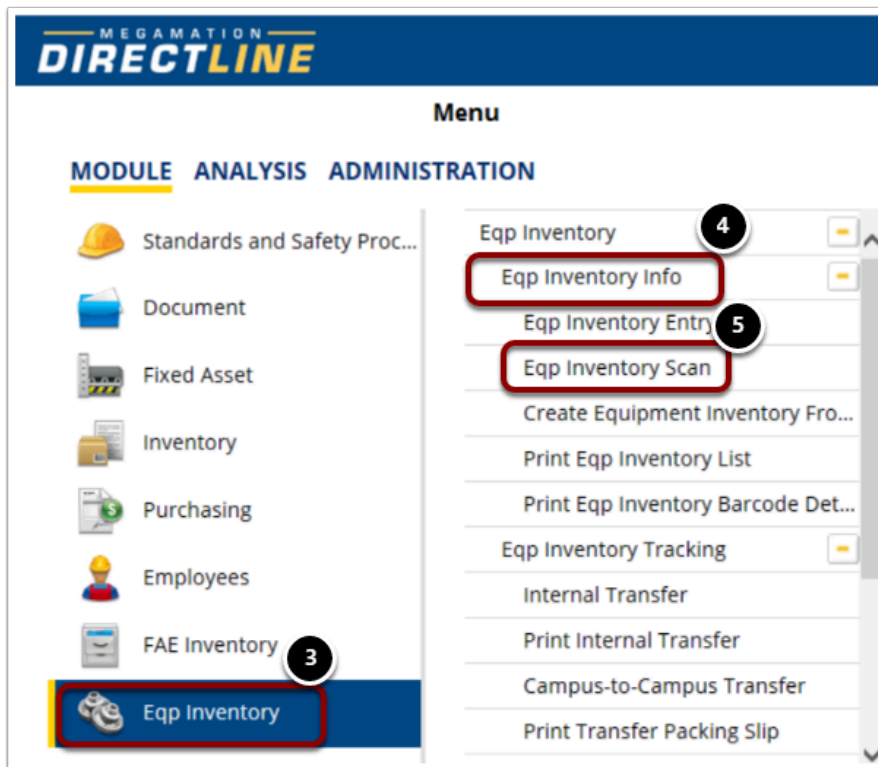
💡 Consult with DirectLine to see if your selected bar code scanner and tablet or laptop are compatible. They may need to help you with the initial setup. This process assumes you have access to wi-fi during your physical inventory process. Your access to DirectLine is through the internet. If you have dead spots on campus, you may need to do some of your inventory by hand and complete those items back at your desk.

1. Collect your bar code reader and portable device.
2. Confirm set-up and compatibility with DirectLine.



**Navigation:** Module / Eqp Inventory / Eqp Inventory Info / Eqp Inventory Scan

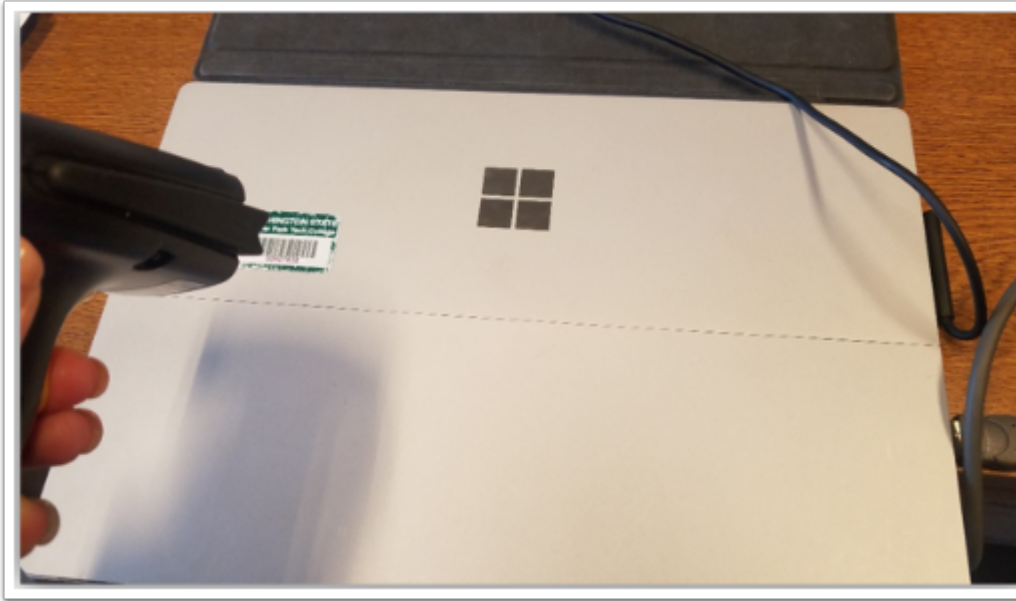
3. Select **Eqp Inventory**.
4. Select **Eqp Inventory Info**.
5. Select **Eqp Inventory Scan**.



The **Equipment Inventory Scan Entry** screen opens and is ready for you to begin.

The screenshot shows the 'Equipment Inventory Scan Entry - DL - DL' window. At the top, it says 'Please scan the ID or State Tag Or Serial #'. Below this are three input fields: '\*ID:', '\*State Tag:', and 'Serial #:', each followed by a text box. To the right of these fields is an 'Update' button. Below the input fields are two more fields: 'Inventory Check Date:' with a dropdown arrow, and a checkbox labeled 'Automate update'. Below these is an 'Inventory Status:' field with a text box. To the left of the 'Inventory Status' field are two more fields: '\*Building:' with a dropdown arrow and 'Room:' with a dropdown arrow. To the right of these fields is a 'Custodian Information' section with three fields: 'Custodian:' with a dropdown arrow, 'Phone:', and 'Mobile:'. Below these fields is a paragraph of text: 'This utility update Inventory Check Date, Status, Building, Room, Custodian Information by using Barcode Scanner. If the Automate Update is checked, the update will be done at the time when a valid barcode is scanned. It takes Barcode input: Equipment ID, State Tag # and Serial #.' At the bottom of the window are three buttons: 'List of Eq in Current Room', 'List of Eq Scanned So Far', and 'List of Eq Not Scanned in Current Room'.

6. Scan your first item.



7. The ID, State Tag, and Inventory Check Date will automatically populate. You will also see a message in the bottom left corner indicating that record is updated automatically.

Equipment Inventory Scan Entry

Please scan the ID or State Tag

\*ID: 10002 \*State Tag: 00507638 Update

Inventory Check Date: 11-15-2019 ☒ Automate update

Inventory Status: \_\_\_\_\_

\*Building: \_\_\_\_\_ Room: \_\_\_\_\_

Custodian Information

Custodian: \_\_\_\_\_ Phone: \_\_\_\_\_ Mobile: \_\_\_\_\_

10002 is updated automatically.

List of Eqp in Current Room List of Eqp Scanned So Far List of Eqp Not Scanned in Current Room

Continue scanning assets. You can monitor your progress by using the buttons at the bottom of the screen to check:

8. What are all the items in the current building / room?
9. What are all the items that have been scanned so far?
10. What are the items not yet scanned that should be in this building / room?

This utility update Inventory Check Date, Status, Building, Room, Custodian Information by using Barcode Scanner. If the Automate Update is checked, the update will be done at the time when a valid barcode is scanned. It takes Barcode input: Equipment ID, State Tag # and Serial #.

List of Eqp in Current Room

List of Eqp Scanned So Far

List of Eqp Not Scanned in Current Room

Equipment Inventory Scan Entry - DL - DL

Please scan the ID or State Tag Or Serial #

\*ID:  \*State Tag:  Serial #:

Inventory Check Date:  ☒ Automate update

Inventory Status:

\*Building:  Room:

Custodian Information

Custodian:  Phone:

Available Eqp Inventories

	ID	State Tag	DESCRIPTION	BUILDING_ID	ROOM	DEPARTMENT	PROGRAM	QUANTITY	Commodity	Inventory date	Total Cost
1	DO5990	DO5990	IRRIGATION SYSTEM	00U	U101	PLANT-OPERATI	NA	1.00	3752	01 AUG 2016	38738.00
2	10312	DO6267	OFFICE 126A	00U	A017	MATH-SCIENCE	NA	1.00	6630	19 DEC 2019	16450.49
3	10315	DO6270	OFFICE 126A	00U	U101	BASIC-SKILLS	NA	1.00	6630		16450.49

11. You can change information in any of the fields listed on the screen. You may learn an asset is now managed by a different person or is housed in a different building/room.
12. With Automate Update box checked, the equipment record will also be updated.

Equipment Inventory Scan Entry

Please scan the ID or State Tag

\*ID:  \*State Tag:

Inventory Check Date:  ☒ Automate update

Inventory Status:

\*Building:  Room:

Custodian Information

Custodian:  Phone:  Mobile:

506527 is updated automatically.

List of Eqp in Current Room

List of Eqp Scanned So Far

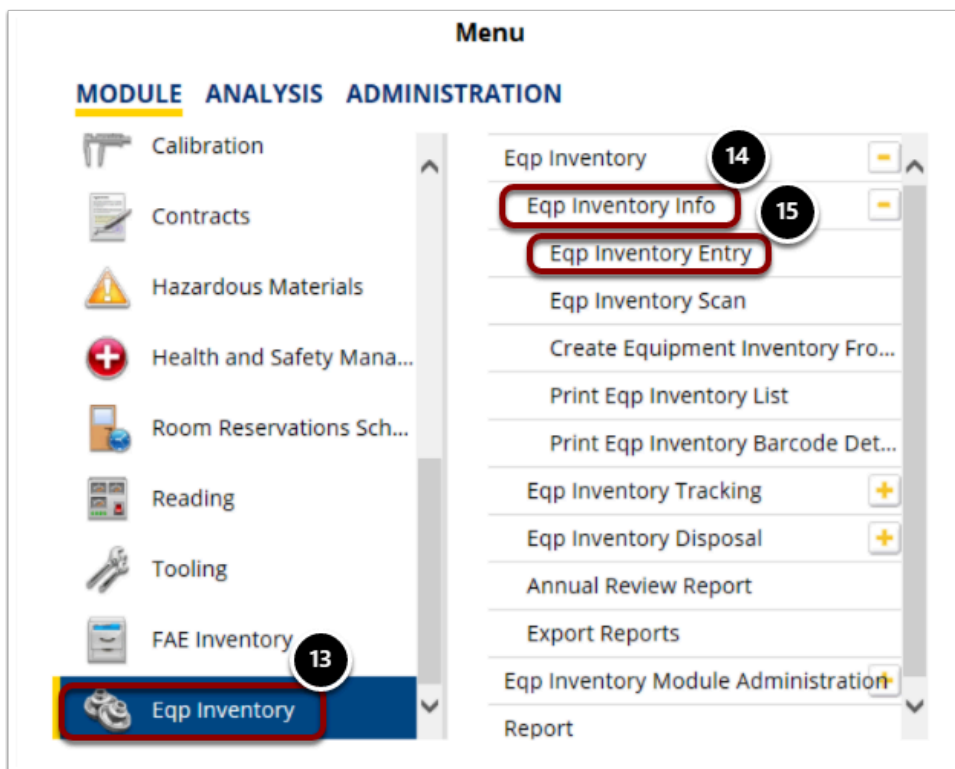
List of Eqp Not Scanned in Current Room

💡 You can uncheck the **Automate Update** checkbox if you have an item that needs some research before you update the equipment record. Make any entries needed, then click the **Update** button to finalize.

You can confirm the updates have been posted to each asset by navigating to the equipment record.

**Navigation: Module / Eqp Inventory / Eqp Inventory Info / Eqp Inventory Entry**

13. Select **Eqp Inventory**.
14. Select **Eqp Inventory Info**.
15. Select **Eqp Inventory Entry**.



16. Enter equipment **ID**.

**Eqp Inventory Entry**

16 \*ID: 506527 Next Available ID Entered by: DIRECTLINE Entry Date: 05-19-2016 Status: IS

Fixed Asset: Create/View \*Acquisition Date: 10-20-2011 Transfer ID: Surplus List:

General FAE/Cost Lease/Warranty Asset History State Tag: 506527 RFID Tag:

**Eqp Inventory Basic Information**

Type: Value: ☐ Inventory Check Total Fund Cost: \$0.00

Sub-type: SD: Desc: IPAD 32GB

\*State Tag: 506527 Details: IPAD 32GB APPLE M05C03817

\*Quantity: 1

☐ Portable Federal Grant #: Federal Grant Terms: Federal Grant Condition:

☐ Shop-built

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**Program Information**

Department: 3C3C ACCOUNTING SERVICE

Program: 3C3C ACCOUNTING SERVICE

Project:

Account:

Unit Cost: 654.71 Capital Purchase: ☐

Quantity: 1 Small&Attractive: ☐

Total Amount: 654.71

RSVN Date: 12-11-2014

**Acquisition Detail**

Vendor:

Model: M05C03817

Mfg.: APPLE

Serial: DN6G122EDKPJ

PO#: 120698

\*PO Date: 10-20-2011

Tag#: 506527

Dispose Date:

Dispose Status:

Disp Auth. Num:

Inventory Check Date: 11-15-2019

Inventory Status: 1920 INV SEEN

**Location Information**

Campus:

\*Building: 017 Administration

Room: 104B Room 104B

Wing:

**Custodian Information**

Custodian: PETROV, TANYA

Phone:

Mobile:

**Ownership Status**

1

Owned by institution

☐ Owned by College

☐ Donated by

☐ Ownership retained by

**Navigation**

Tracking Surplus/Disposal

Prints Exports

Receive Multiple

Procedure complete.