How to Start Using a System

If you are interested in using this application and do not currently have access, simply send an email to engrit-apps@illinois.edu. Please take a look at the application costs located at http://it.engineering.illinois.edu/services/portal-applications-engineering. A CFOP will be required before access can be granted. If you would like to test the application before purchasing, please indicate such in your email.

Basic Information

The LoanTracker application is designed to create “loan programs” where loaned out items can be tracked. LoanTracker works best when there is a barcode of the item to be loaned. The initial setup requires a loan program be named then items entered into that loan program. Permissions can then be assigned at the loan program level, if required. Then, when an item is loaned out, the item is scanned out with the person’s iCard to track who is taking the item. When an item is checked back in, the item is removed from that person’s account and returned back into the loan program to be scanned for the next person who the item is loaned to.

Levels of Access

LoanTracker has one level of access. Manager access allows full control over the application to change settings, setup loan programs, and scan loaned items. A manager of the application will see all loan programs in the application. As a manager, you can assign access at the loan program level. If assigning access at the loan program level, additional access is not required. That person will only see the loan program that they are assigned to manage.

Data

The data for this application is stored in a LoanTracker database, local to the application. The iCard / Netid for the person that is receiving the loaned equipment is retrieved from the EDW.

Logging in to LoanTracker

You can access the LoanTracker application by going to your portal (http://my.yourportal.illinois.edu) and logging in with your NetID and your Active Directory password. If there is a LoanTracker link, click on it to go to the application. If there is no LoanTracker link, go directly to the application by typing into a browser http://my.yourportal.illinois.edu/loantracker. If you get a permission denied error, please contact Engineering IT Share services support at engrit-apps@illinois.edu.

Getting Started

If you have access to more than one departments LoanTracker application, you may need to use the highlighted dropdown to switch between departmental Loan Programs.
Setting up a “Loan Program”

To setup a loan program, go to Setup > Loan Programs

Click on “+Create New”

Give the Loan Program a name. If you would like someone else to manage the loan program that does not have manager access to the LoanTracker application, you can enter the netid or active directory group in the “manager AD group” field. Click “Save”. You should see the loan program on the listing of the loan programs.

Changing the Settings in a Loan Program

To add setting to the Loan Program, you can click on the loan program in the listing.
You will see the Locations, Product Types, and Statuses tab on the right section of the screen. To add a location of the Loan Program, click “+Create New”. The location allows you to establish a location that that item was loaned from.

Enter the name of the location for the “Loan Program”. Click “Save”. You should see the location on the listing of locations for this loan program. If you would like to edit or delete a location, you can do that in the locations listing. You can enter any number of locations that are needed in the Loan Program.

Next, click on “Product Types”. To add a new Product Type, click “+Create New”.

Type in the Product Type in the Loan Program. Examples could include Laptops, Adapters, Projectors, Textbooks, etc. Set the “Is Default” dropdown box to “True” if you would like the Product Type to be the default Product Type when an item is scanned. Most product types should be left at “Not Set”. Leave the “Display TA Assignments” checkbox blank. Click “Save”. If you would like to edit or delete a Product Type, you can do that in the Product Type listing. You can enter any number of Product Types that are needed in the Loan Program.
Next, you can customize the statuses in a Loan Program. By default, “Checked In” and “Checked Out” are included in the Loan Program. You can add a new status by clicking “+Create New”. Click “Save”. If you would like to edit or delete a Status, you can do that in the Status listing. You can enter any number of Statuses that are needed in the Loan Program.

You have successfully created a “Loan Program”. Now, you can add the products that will be loaned from the Loan Program.
Adding Products to a Loan Program

To add a product to a loan program, first make sure you are on the products tab and have the correct loan program, location, and product type selected. Then click the “+Add Product” button.

Enter the any of the information that applies to your product. Name, Product Type, Bar Code, and Location are required. Then, click “Create”.

You will see your product appear on the product listing. You may need to change the location or product type to see your new product.

You can continue to add products until you have all of the products in your loan program. If you have multiple versions of the same item and would like to track them as a group, each with a unique identifier, you can create a “product units” by clicking on the edit button by your product.

To the right of the product that you have already entered, you will see the “products units” section. It should already contain the item you have created. If you would like to add multiple versions of the same product, click “+Create New”.

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**Image Description:**
- The image shows a table with columns for Loan Program, Location, and Product Type.
- Rows are displayed with details such as ID, Name, Description, Product Type, Bar Code, and Status.
- The table includes records for different products, with options for actions like “Add,” “Edit,” and “Delete.”

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**Table Example:**
<table>
<thead>
<tr>
<th>ID</th>
<th>Name</th>
<th>Description</th>
<th>Product Type</th>
<th>Bar Code</th>
<th>Status</th>
</tr>
</thead>
<tbody>
<tr>
<td>1234</td>
<td>Textbook</td>
<td></td>
<td>Textbooks</td>
<td>123456789</td>
<td>Available</td>
</tr>
<tr>
<td>5678</td>
<td>Reference</td>
<td></td>
<td>Reference</td>
<td>876543210</td>
<td>Available</td>
</tr>
<tr>
<td>9012</td>
<td>Software</td>
<td></td>
<td>Software</td>
<td>987654321</td>
<td>Available</td>
</tr>
</tbody>
</table>
A new screen will appear where you can enter in the information for the product unit. Enter the information (Bar Code and Location are required) and click Save. The item will show up on the “Product Units” table. Items entered will default to a “checked in” status. Enter as many product units as necessary. Entering product units is not required.

To further explain Product Type, Products, and Product Units: A product type is a book, laptop, tablet, etc. A product is a book such as “Physics 101 Workbook 1st Edition”. A product unit are the copies of that book that are in inventory. Each product unit should have a unique barcode identifying the item.

Once all items are entered, you can return to the main setup page and see the number of available units in the status section of the table.
Using the application – Checking Items In/Out

When a user presents to check an item out, simply scan their iCard or enter their netid. The user’s picture and information will show up on the right.

Next, scan the barcode of the inventoried item. If the item is in inventory, you will see a message that the item was successfully checked out (or checked in) and the information from the item will move into the recent loans table. If the item is not in the correct status, you can change the status at this time by clicking on the dropdown and choosing the correct status.

If the item is not found in a loan program, you will receive the following error. The item will need to be added to a loan program for it to be successfully tracked in this system.