Inventory maintenance in TMA

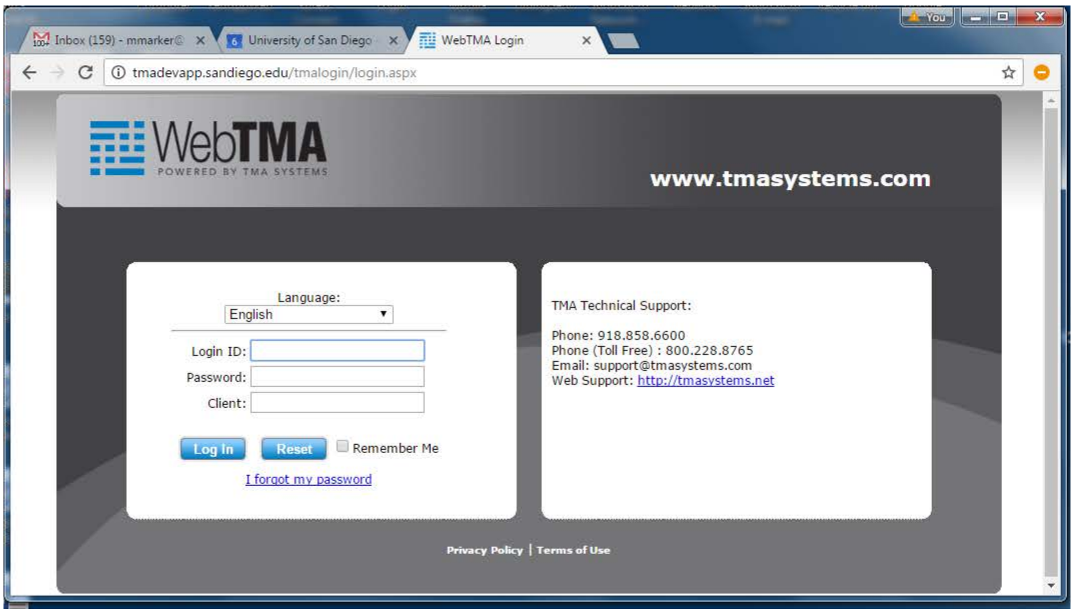
To get into Testing version to practice TMA – use google chrome or IE or Firefox to go to:

http://tmadevapp.sandiego.edu/tmalogin/login.aspx

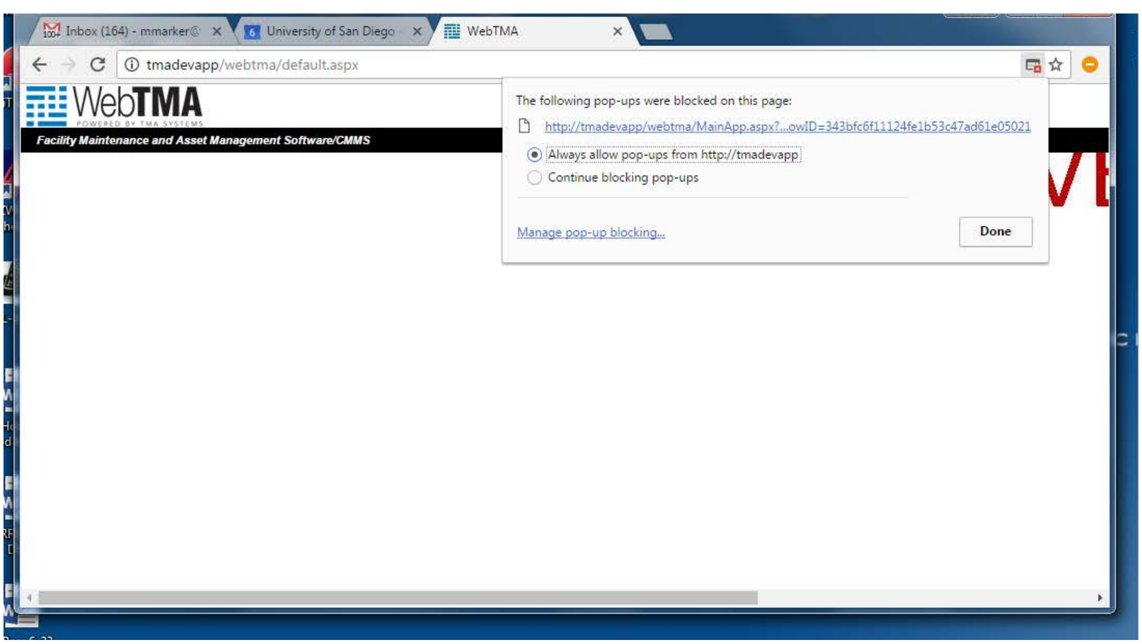
To get to Production:

http://tmaprodapp.sandiego.edu/tmalogin/login.aspx

Use our normal USD log in name and password, but add "USD" for the Client field

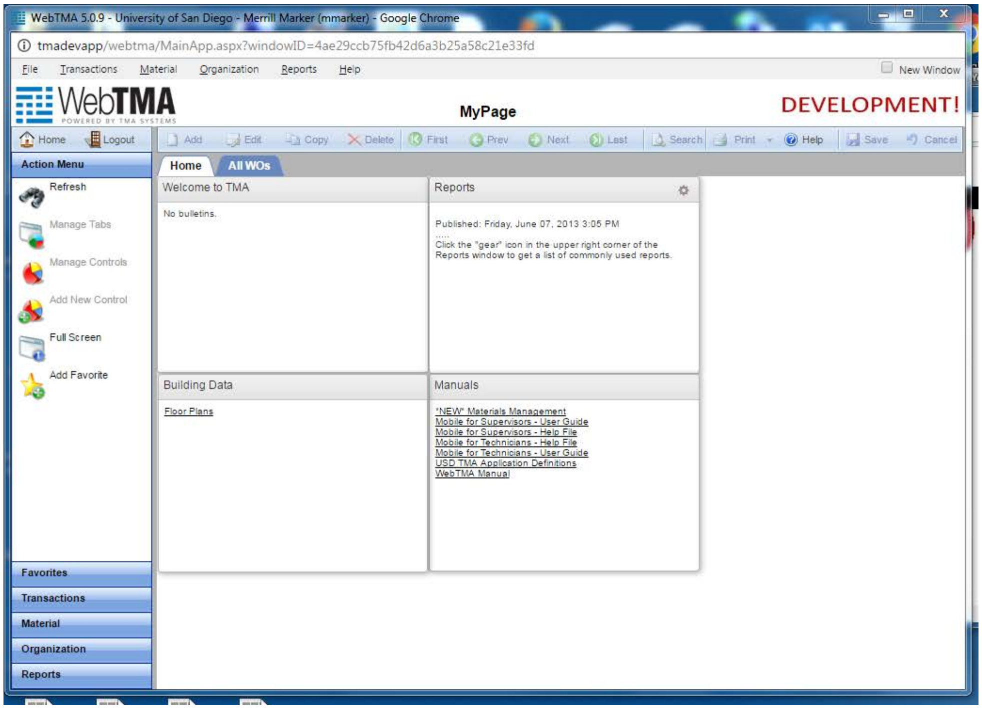


NOTE: If you get an all white screen, it is because you have your pop-up block on. So go to the top right corner where the little red x is on the box and approve the pop up, then refresh your screen

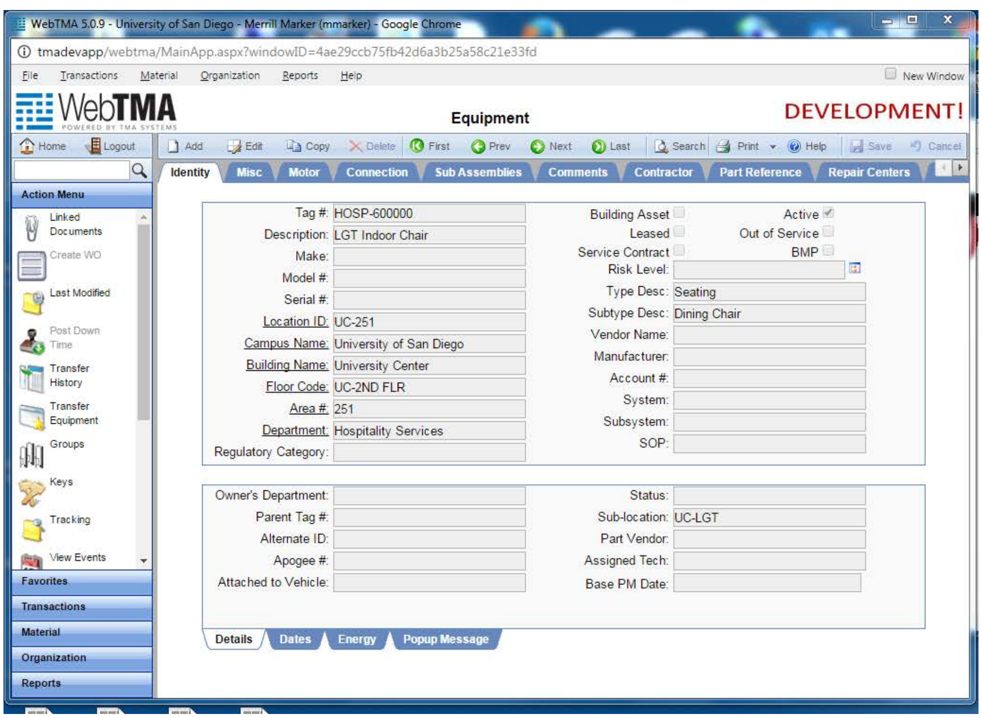


Here is the starter screen – you'll want to click on the "Organization" module on the bottom left side

Then click on "Equipment" (picture is a fire extinguisher)



Now you will be on the first of the list of all our items. (You can only see our Hospitality inventory but likely you can see all of it…meaning Catering, Conference, and LGT)

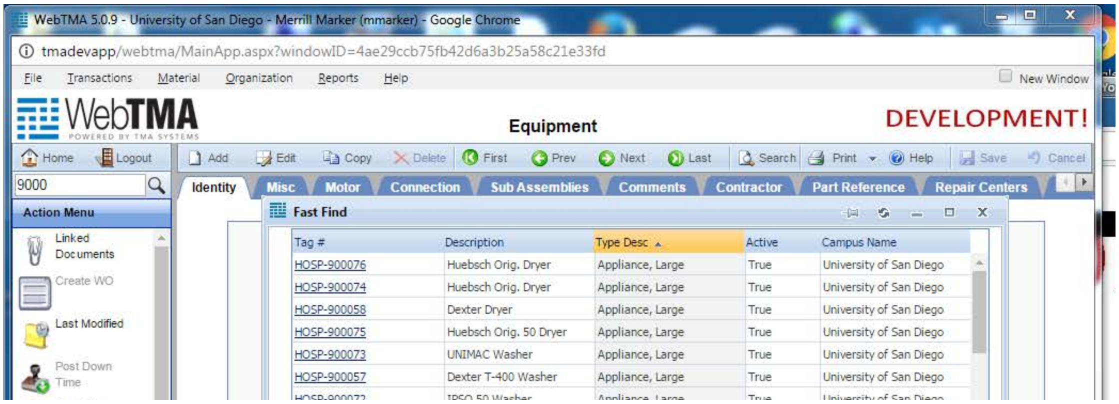


To look around you can use the green arrows to click forward or back, or to the end or beginning.

There are Tabs near the top (ie: Identity which is the primary) and black arrows to the right to get to the additional tabs you'll need (ie: Depreciation and UDF)

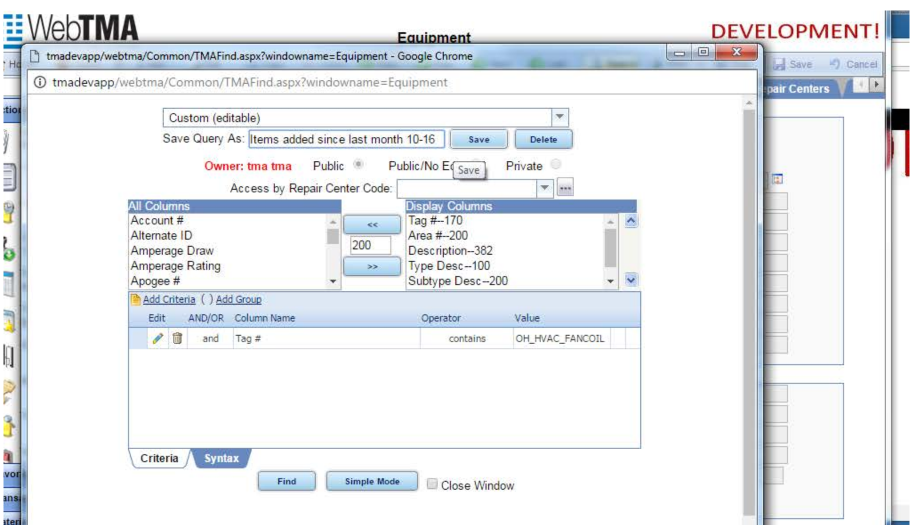
There is also a search box on the upper left side which allows you to put in all or part of a tag number

If you are using the search box you'll get a "fast Find" list, and you can be more efficient in using this list by double clicking on the column headers (like Description or Type Desc) to re-order the list.



Here is also a Search icon at the top by the green arrows, and this allows you to customize a query to get a list to look through or export.

To customize a query open an existing query, then click Edit OR "Custom (Editable), and name your query, then decide if you want it to be publlic, publick no edit, or private (usually you'll do private), then use the right arrow and left arrow keys to add or remove fields that you want to see or don't want to see. To help the viewing you can click on the number in the box between the arrows to change the column width



Also – you can export this list (look to the bottom center). It will come out in excel formal. Be sure to select "all pages" before exporting so you get the full list and not just the first page.

TO EDIT AN ITEM:

Choose the Identity Tab to have the most commonly used information for an item.

Click the Edit Button at the top

Note: The Yellow & Red fields are required to be filled in.

You can just type in your changes, for example if you move to a new location.

There are many fields that you complete using a drop down, or to really look around for an option click on the three dot icon next to the drop down and you can click through a lot of options.

You might want to make it not active if you are temporarily unable to use it (like sending it off-property to be repaired) and so you simply un-check the "Active" box in the upper right side (but you don't need to click "out of service", you just un-click the active)

There are a number of other "Tabs" besides Identity you might want to update, and those typically would be the following:

Comments – for example if you send it out for repairs you might note where and when

Depreciation – this is the original cost, and the

UDF – the is for the Replacement amount, and the energy efficiency status

Repair Center –leave this as Hospitality – it is just to identify our department

Date (at the bottom) for date purchased & expected life – also any warranty info or original PO number

YOU MUST CLICK SAVE WHEN YOU ARE DONE MAKING YOUR UPDATES

Note: If you wish, you can connect another document with this item, like a pdf of a repair order. To do this click on the "linked Documents" icon on the left side under action menu.

TO ADD A NEW ITEM:

The First step is to figure out what Tag number is next available because the system will not assign one

For Hospitality, because we used the Tag number to separate the inventory between areas, you'll need to use the left search box, to get a Fast find list, then click to find the last number currently in use for that area (and there are page number tabs at the bottom to help you get to the last number:

LGT = Starts with HOSP-600000
Kitchen = Starts with HOSP-700000
Catering = Starts with HOSP-800000
Conference = Starts with HOSP-900000

(Other departments get to just click on the green dot for "Last" from the Identity box because that will take them to the end, but for Hospitality that would take you to the 900000 series which is Conferences)

OK – now that you can see the last Tag number used by that division of Hosp, click on it.

Now click "Copy"

Once the Tag # is a Yellow box, change it to the next sequential number.

Then continue to change the existing information to be correct for your new item, keeping in mind you want to remember the following that don't show on that first screen:

add Purchase date and the useful life of the item onto the "Date" tab at the bottom,

add the original cost onto the Depreciation tab

add the anticipated replacement cost and if the item is energy efficient on the UDF tab

Note: We don't include the shipping or installation cost … but Kari might change this so TBD

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Note: We don't recommend trying to add a new item by using the "add" icon at the top because it's important to get prompted by seeing the fields we make it a point to complete, and have much of that default info fall into place for you, for example the repair center will be correct, etc.

TO PRINT A LABEL TO TAG A NEW ITEM:

You can query the recent activity, then export and print…or you can e-mail Tom Prichard if you don't have a printer and he can print for you.

There is a public query named **SA Tag Export**

Attached are instructions on how to export the equipment info from TMA and how to print the labels.

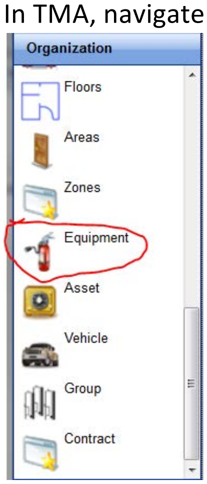
Also attached is a new label file you will need because the file name and field names have changed.

The label file should be saved in C:\Zebra\Labels.

<u>Print New Zebra Labels from TMA</u>

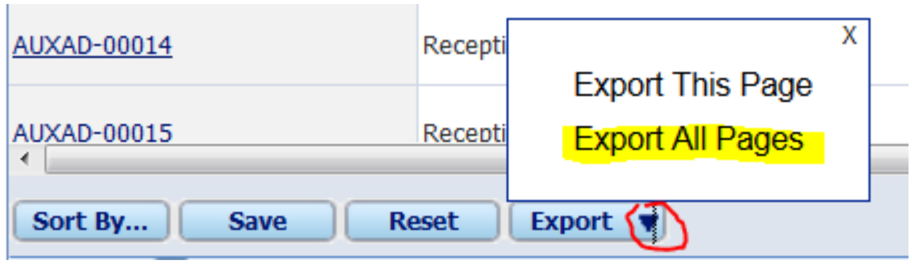
This process describes how to export label information from TMA and print the labels using the Zebra label printer.

1. In TMA, navigate to the Browse tab in the Equipment record

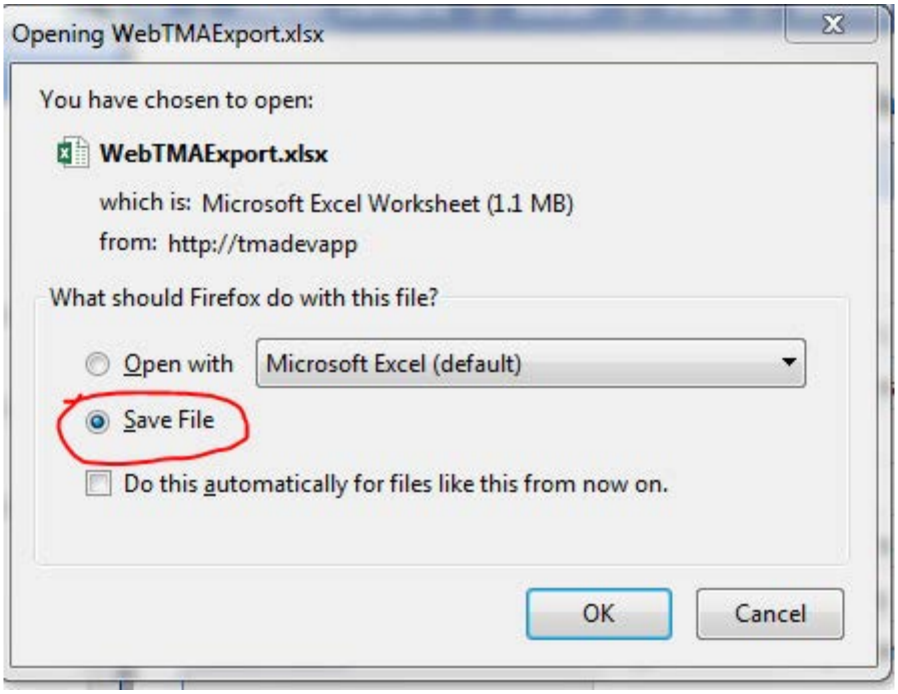


2. Select the query **SA Tag Export**

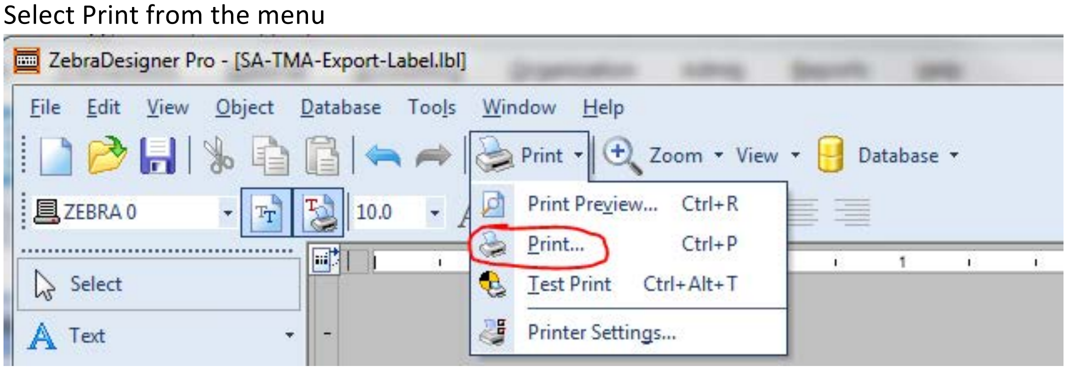
3. Press the **Export** button – make sure you select Export All Pages



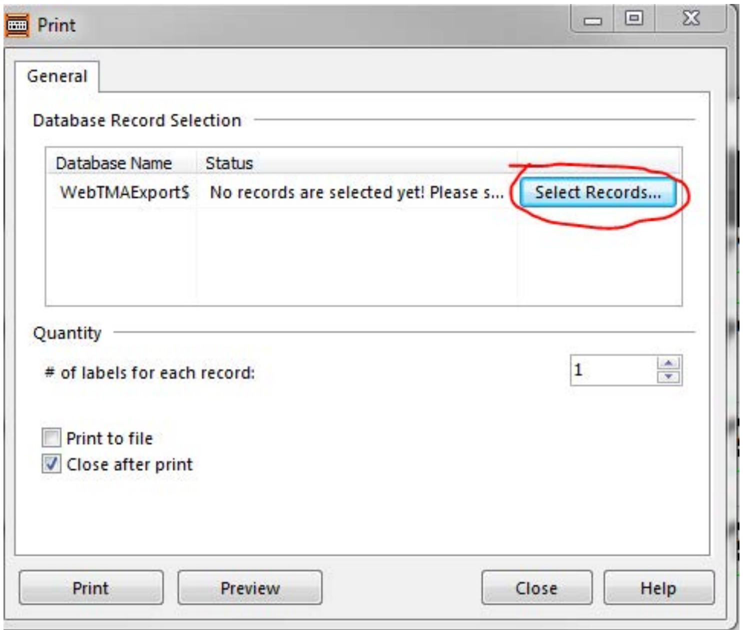
4. Select Save File



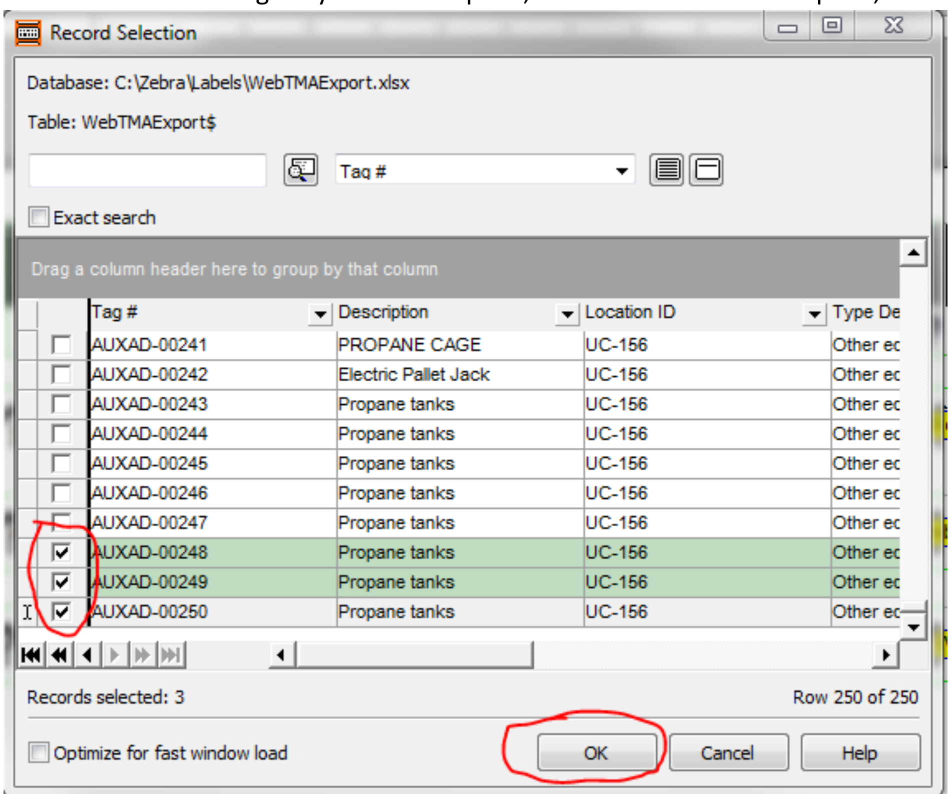
5. Copy the file **WebTMAExport.xlsx** from **C:\Downloads** to **C:\Zebra\Labels**.
    a. Overwrite existing file if one exists.
    b. If the filename has a number after it, rename it to remove the number. Example: if it is WebTMAExport(1).xlsx then rename it to WebTMAExport.xlsx
6. Connect the Zebra label printer to your computer
    a. Make sure the drivers and software have already been installed
7. Open the label file **C:\Zebra\Labels\SA-TMA-Export-Label.lbl**
8. Select Print from the menu



9. Press **Select Records** to select the records that you want to print new labels for

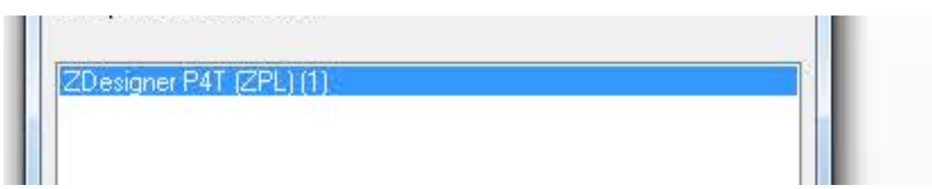


10. Scroll down to the Tag #'s you want to print, then check the ones to print, then hit OK



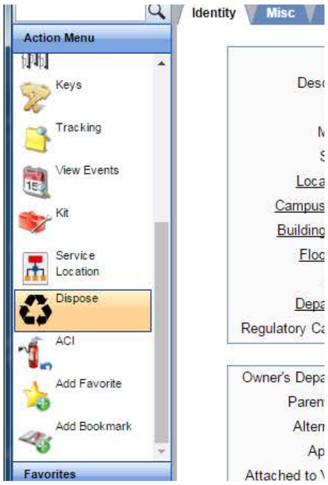
11. Press **Print** to print the labels

The printer likely is:



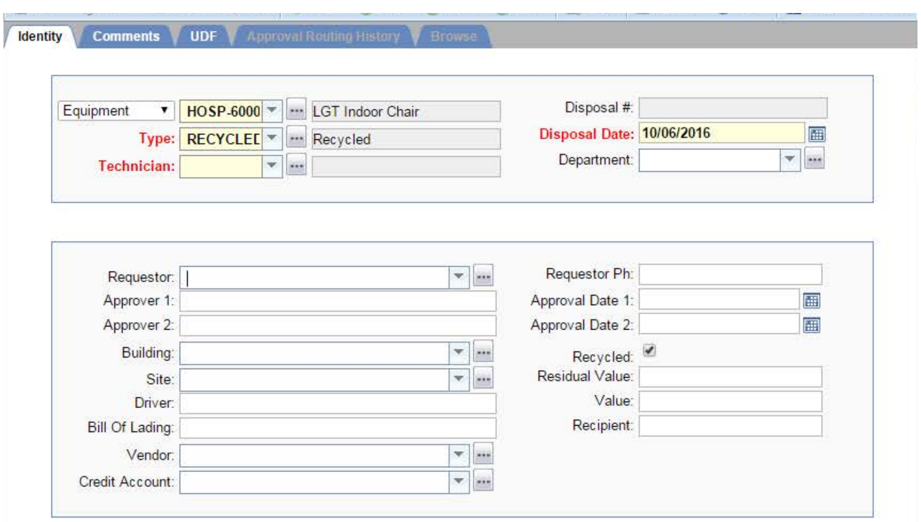
TO DISPOSE OF AN ITEM:

Be on the Identity Tabl for the item, and then scroll down on the "action Menu" list to the left, until you see the "Dispose" action which has a icon like a recycle triangle (shown below in orange).



You'll get a small pop-up window (see below) and you'll fill in the following fields:

Type: choose from Donated, Recycled, Salvage, Trash (or with approval Employee)
Technician: this will always be SA1
Disposal Date: Todays Date
Department:
Requestor: who determined it was ok to disgard
Approver 1: who approved the requestor to disgard it
Recycled: just a box to check
Residual Value: (current value If it is still working and useable by whomever you give/sell it to)



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Note: The System will automatically assign a disposal number when you click save, and it will change the active status box to be "un-checked" and put a recycle icon just next to is as a sign the item is gone.