

Add an asset(s) to a Property Pass, Repair Pass, or Loan

Note: Property passes are issued to DOC employees when taking items off-site. Repair passes are issued to vendors when taking items off-site. Loans are issued when an external organization or non-DOC person is loaned an item. Different types of passes require different types of information, as follows:

- Property Passes - must include a DOC Person's name
- Repair Passes - must include an Organization
- Loans - may contain Person's name or Organization

If these conditions are not met, you will not be able to save the record.

1. Select from the menu tool bar: **Admin> User Extensibility> User Defined Menu> DoC Forms> CD-546 / OF-7**
2. Depending upon the type of pass, pick **Property Pass, Repair Pass, or Loan** from the **Type of Pass** list of values
3. Enter the **Purpose of Loan** (e.g. Working from home, item is broken, research project, etc.)
4. Enter the date the pass is issued in **Loan Date**
5. Enter the date the item is due back in **Due Date**
6. Enter **Organization** (Repair Pass or Loans only)
7. Enter the **Person Last Name** and hit the tab key (Property Pass and Loans only)
8. Select the **First Name** of the borrower
9. Enter the address of the borrower, using **Street, City, State, and Zip**
10. Enter the **Office and Room Number** of the borrower (Property Pass only)
11. Enter the **Contact Name** and the **Telephone** number of the contact person (Repair Pass and Loans only)
12. Enter the Barcode Number(s) in the **Assets** section
13. Hit the **Save** button
14. Hit each **Print** button to print both the **CD-546** and the **OF-7**

Note: If there are multiple assets on pass, each pass will have its own CD-546 or OF-7 page

Print the **Agreement Assets** report to view assets on pass

Note: Do not print the Agreement Assets (Global Information) report – this report will not give you the information you need

1. Select from the menu tool bar: **Agree> Agreement Reports> Agreement Assets**
2. Depending on what you want to view, enter one or more of the following parameters. Enter:
 - a. The **Agreement Identifier** (Pass Number) or the **Agreement Type** (Property Pass, Repair Pass, Loan Pass) to view specific passes or types of passes
 - b. The **Organization With** organization to view passes out with a specific organization
 - c. The **Person Last Name** and **First Name** to view passes out with a specific person
 - d. Your **Cust Area** to view all assets on pass or loan in your Custodial Area
 - e. Enter dates in the **Only Agreements Scheduled to End Between** fields to view assets due back within a specified time frame
 - f. Use any other parameters as appropriate
3. Hit the **Submit** button
4. Select **Acrobat** as the output format
5. Hit the **Execute** button

Remove an asset(s) from a Property Pass, Repair Pass, or Loan

1. Select from the menu tool bar: **Admin> User Extensibility> User Defined Menu> DoC Forms> CD-546 / OF-7**
2. Hit the **Find** button
3. Depending on which parameter you want to query by, enter one or more of the following parameters. Enter:
 - a. The **Pass Type** to pull up all passes of a specific type (Property Pass, Repair Pass, Loan)
 - b. The **Pass Number** to pull up a specific pass
 - c. Either of the **Date** fields to pull up passes issued on a specific date or assets due back on a specific date
 - d. The **Person** information to pull up all passes used to a specific person
 - e. The **Organization** to pull up all passes issued to a specific organization
4. Hit the **Find** button again
5. Click on the asset and hit the **Remove Record** button (to remove other assets, click on other assets and repeat this step)
6. Hit the **Save** button

Note: Assets will not be officially removed from the pass until you hit the **Save** button