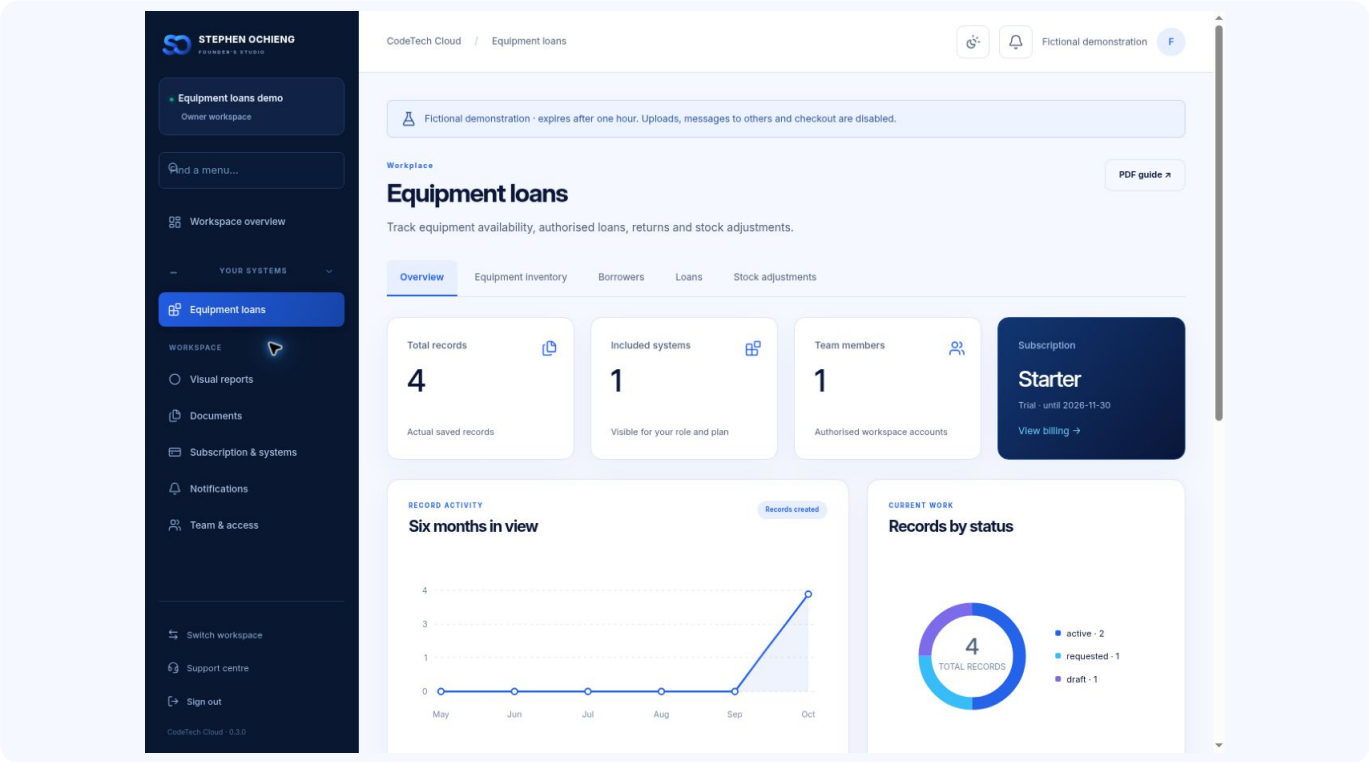
Equipment loans

Workplace / Orientation and scope

Track equipment availability, authorised loans, returns and stock adjustments.

THE CORE WORKFLOW

Create inventory and a borrower, approve a loan, issue available stock, then return it once.



Fictional-data interface capture supplied by the training project. Screen content is illustrative, not live customer activity.

Start with the right workspace

Use a role that permits the intended action. Viewers cannot write. Select the correct organisation, confirm this system is included in its subscription and use test records for your first run. The guide describes the listed core records; advanced sector requirements are evaluated separately.

Prepare the records

Data workbook / Exact fields and input meaning

Equipment inventory

Field	Type	Entry guidance
Equipment name	Text	Plain text, up to 200 characters.
Asset / item code	Text	Unique within the workspace; up to 200 characters.
Serial number (optional)	Optional text	Optional plain text.
Available units	Quantity	Up to three decimals. Transaction quantity > 0.
Condition	Choice	Choose exactly one: good, serviceable, maintenance.

Borrowers

Field	Type	Entry guidance
Borrower name	Text	Plain text, up to 200 characters.
Email	Email	A valid email address.
Phone	Text	Plain text, up to 200 characters.

Prepare the records

Data workbook / Continued

Loans

Field	Type	Entry guidance
Equipment	Reference	Choose from items in this workspace.
Borrower	Reference	Choose from borrowers in this workspace.
Units	Quantity	Up to three decimals. Transaction quantity > 0.
Due date	Date	Calendar date. End follows start when paired.
Handover notes (optional)	Optional text	Optional plain text.

Stock adjustments

Field	Type	Entry guidance
Equipment	Reference	Choose from items in this workspace.
Adjustment direction	Choice	Choose exactly one: addition, removal.
Units	Quantity	Up to three decimals. Transaction quantity > 0.
Reason	Long text	Plain text; up to 12,000 characters.

Each record also carries a workspace, stored state, version and timestamps. Those controls are separate from the business fields above.

Apply a valid action

Actions and safeguards / Run the core process

Record	Possible states	Action and result
Equipment inventory	active	No configured state action.
Borrowers	active	No configured state action.
Loans	requested, approved, checked out, returned, rejected, cancelled	Approve: requested -> approved (manager) Issue: approved -> checked out Return: checked out -> returned Reject: requested -> rejected (manager) Cancel: requested, approved -> cancelled
Stock adjustments	draft, posted	Post: draft -> posted (manager)

Core checks to review

- The configured loan sequence requires approval before issue. Issue allocates available units; return restores the loan quantity once.
- Inventory condition, available units and the manager-only stock adjustment workflow must be reviewed before issue or adjustment.

Use the saved state

The first configured state for loans is "requested". Use the permitted action for the current state and version. A repeated or stale action is rejected. Processed records cannot be edited as if they were still drafts.

> **APPROVAL IS A ROLE CHECK**
>
> Actions marked "manager" require an owner or manager. The module also declares manager checks for approve, post, reject. An action label is not proof of external payment or approval outside the application.

Check the result

Validation and interpretation / Your first controlled run

1 **Prepare the context**

Create or choose Equipment inventory, Borrowers. Confirm that every reference belongs to the selected workspace.

2 **Save loans**

Enter the required fields from the workbook. Inspect the stored record and any server-calculated values before proceeding.

3 **Apply and inspect**

Use approve only from an allowed state. Reload the record and verify its new state and any related stock, capacity or budget effect described in this guide.

4 **Try the protective check**

Try issuing above available units and returning an already returned loan; confirm that neither creates an invalid stock movement.

Read the records in context

- Read the equipment, borrower, units, due date and loan state together. Approved is different from actually checked out.
- A returned loan and a posted stock adjustment represent different inventory events; retain their separate references.

> **EVALUATE THE ADVANCED REQUIREMENTS**
>
> Depreciation, asset valuations, barcode hardware and automatic procurement need separate evaluation.

For a support request, include the workspace, system, record reference, action, expected result and observed result. Remove passwords, payment secrets and unnecessary personal data.