



# **MacCheckout**

Users Guide

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*(Note: Any problems or questions regarding MacCheckout can be sent to the above e-mail address and are usually responded to within 24 hrs. Be sure to include: a return e-mail address, a day time phone number and the name of a contact person. Include a detailed description of the problem or question. Similarly, if you have a feature request, send it to the above e-mail address along with a return e-mail address, a day time phone number and the name of a contact person, in case there needs to be a follow up question.)*

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## Introduction

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Welcome to MacCheckout.

This short guide explains the functions that you will encounter while operating MacCheckout in the 'launched' mode. It tries to answer the basic questions that someone new to the system will have and illustrate some of the 'hidden' features that have been added to make operations easier or more intuitive.

The guide demonstrates the recommended way of using the software but individual locations may vary things to better fit their needs.

It takes you through a 'day in the life' of MacCheckout from starting the computer in the morning to turning it off at night.

This guide assumes that you have some experience operating a Macintosh™ computer and are familiar with basic terms like 'Shutdown', 'Mouse', 'Hard Disk', 'Keyboard', etc.

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# Guide Notes

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Each section of the guide describes a function or task and the steps needed to complete it. So if you are unfamiliar with the system, it can be used as a step by step tutorial, e.g. Reservation breaks down to: Enter a persons ID number, select the equipment wanted, enter the dates and times requested, and save the data.

Special points are made as notes which take the form of '(*Note*: .....)'.

Items in *italics* are extra notes clarifying a point or suggesting another possible course of action.

It should also be noted that all the items covered in this guide may or may not be available in your system and others may look a little different. This is because the System Operator has control over how some items look and function, and has the ability to turn some items off altogether.

All illustrations in the guide are taken from a demonstration system running in 8 bit (256 color) mode on a Macintosh™. Your system may be run in black and white. In that event items displayed in color will be replaced by items drawn with different patterns. The 3-D buttons will also be replaced by simple black rectangles as can be seen with these two examples.

(*Note*: All items function exactly the same no matter how they look on the screen. It should be noted that an item like 'View' can be a little more difficult to decipher in Black and White, since the colors used to denote the different status of equipment are replaced by different patterns.)



8 bit (256 color)



Black and White

The glossary at the end explains some of the terms that are used to reference items in the system, e.g. 'Agreement Form' and 'Checkout'.

'System Operator' is used to denote someone who has the knowledge to alter the system settings or data in the 'Unlaunched' mode.

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# MacCheckout Items

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MacCheckout is an application that runs on the Apple Macintosh™ 68K and PowerPC computers. Apple set down some guide lines about how programs should work. Most of the time, MacCheckout supports the guide lines. However there are some things that were done a certain way to make life easier for people using the system all the time.

## Screen Size

The MacCheckout main window is fixed in size at 640 \* 480 pixels. That is the size of a standard 13in monitor. All items are designed to fit into that space. In tests, the inexperienced user had difficulty with scroll bars.

## Scroll Bars

Scroll bars are supported for lists of items, especially in dialogs, but where data is displayed in groups on a page, then buttons are supplied to enable you to page through items a certain number at a time, e.g. 'View' pages dates four (4) at a time and equipment seven (7) at a time.

## Dialogs

When you have a scrolling list in a dialog there are several ways of selecting an item:  
(*Note:* All lists that allow you to select an item have an 'OK' and 'Cancel' button.)

1/ Clicking on the item and selecting 'OK'.

2/ Double-Clicking on an item.

3/ Typing the first few letters that start the items name, which selects the first item that the letters match with, and then selecting 'OK'.

(*Note:* If you type 'HHH' and NO item begins with 'H' then no item is selected. Normally a regular Macintosh™ application will select the last item that begins with a 'G' or the first that begins with an 'I'. However in tests, people just ended up selecting the wrong items.)

Where applicable, holding the 'Option' key down, while you click the mouse, will allow selection of multiple items that are contiguous to each other. Holding the 'Command (⌘)' key down will allow selection of multiple items that are not contiguous.

Clicking 'OK' with nothing selected is the same as clicking 'Cancel'.

(*Note:* Clicking the 'Return' or 'Enter' key, is the same as clicking the 'OK' button. Clicking 'Command (⌘) and Period (.)' keys is the same as clicking the 'Cancel' button.

## Save and Print

The main functions 'Save' and 'Print' are always represented by on-screen buttons and cannot be aborted once started.

(*Note:* Some sections automatically save data for you, e.g. 'Find ID')

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## No Undo

The system only supports undo in the dialog boxes. If you want to undo something like a reservation then you have to delete it.

## Short Cuts

There are some short cuts that are supported:

Each time you enter a persons ID number into the system it remembers who you are currently working on. So if you need to do multiple items for the same persons, e.g. 'Reservation' then 'Checkout', then if you select that function while holding the 'Option' key down, the dialog requesting the persons ID number will be displayed with the current ID number already in place. This is consistent throughout the system.

The format of equipment ID numbers is currently fixed at: prefix letter - number - suffix letters, e.g. M-1-TV. The '-' characters are there to make it easier to read the letter number combinations. However they can be very annoying to type. So the system will accept as a valid equipment ID number the same combination of letters and numbers without the '-' characters, e.g. MITV. It will automatically enter the '-' characters for you. This is consistent throughout the system.

## Help

There are three levels of 'Help' built into the system:

1/ At any time you can bring up the 'Help' dialog by selecting 'Help' under the 'Ⓜ' or '⌘' menus. This will give you a list of all the topics available. Selecting a topic will display the 'Help' text currently on file for that item.

2/ At any time you can press the 'Command (Ⓜ)' and '?' keys together. This will cause the on screen pointer to be changed to have a '?' attached to it. Selecting any menu item or clicking on the screen will bring up the 'Help' text for that item directly.

3/ Most of the time while you are using the system, you are warned by dialogs about a problem or task you need to do. However, for items that are obvious, the system will just beep to denote a minor point. Selecting 'Why .../What ...' from the 'Ⓜ' or '⌘' menus will bring up a dialog explaining why the system beeped, e.g. If you click on 'List of Equipment Wanted:' in Reserve or Checkout, when there is no equipment in the list, the system will beep. Selecting the menu item, will state that there is no equipment currently on file to delete.

(*Note:* Clicking on 'List of Equipment Wanted:' will delete any equipment currently in the field below the button.)

# Memory Warning

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## **Warning: Please note**

The system runs totally in memory. There may be occasions as you add more and more data to the system that it will eventually run out of memory. In this case you will get a warning stating that the system ran into a 'Memory Problem'. Most of the time this will happen when you try and save something, e.g. a Reservation or Checkout. 'Save' is the function that requires the most memory.

In the event that you get this kind of error, the system should be 'Quit' or 'ShutDown' immediately. In some cases the system will automatically do that for you. You should then increase the amount of memory assigned to the application and then open it again.

In all cases, any data currently on file will be saved before the application Quits. The one exception will be the task you were actually trying to do. Since this was the one that caused the problem to begin with, it will have to redone when the system is 'Launched' again.

If you get a 'Memory Problem' error, DO NOT ignore it. You are informed of this for a reason, there is insufficient memory to complete a task. If you ignore it then it can cause other items to fail for the same reason and the more tasks, you will have to repeat when the memory partition for the application is finally increased.

*(Note: The System Operator should informed of any problem related to memory.)*

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## **Functions**

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Functions are the basic tasks that you have to perform while operating the MacCheckout program. All the basic functions are described and illustrated where necessary.

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# Startup

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## Turn On All Equipment

Turn the printer on. (Assuming one is attached to the system.)  
(*Note:* If you are using an ImageWriter I or II make sure that the 'Select' switch is in the correct position, the green light should be ON.)

Turn on any peripherals attached to the computer and then the computer.

## Open Application

Open the MacCheckout application. (Double-click on the application)  
*This step can be avoided if the application is made a startup item.*

## Launch

When the application is open, the system must be launched. This is done by clicking on the 'Launch' button at the bottom right of the screen.

(*Note:* If 'F12' is visible, as in the illustration, then the Function keys are enabled. If your keyboard has Functions keys, then pressing key F12 at the top of the keyboard will have the same effect as clicking the button with the mouse.)  
*This step can be avoided if 'Auto-Launch' is turned on in the 'System Setup' menu.*



## Main Menu

When the system is launched you will be presented with a screen similar to this one.  
(*Note:* This will be referred to as '**Main Menu**' throughout this guide.)



(*Note:* The menu names will vary from system to system. Notice also the '¥' character

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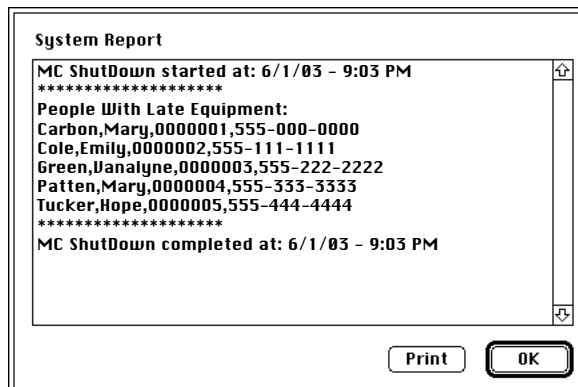
at the top left of the screen instead of the 'S' character. This signifies that the Apple menu has been disabled and that you do not have access to any of the items usually stored there. The 'Welcome to MacCheckout...' text will also vary or may be missing altogether, since this has to be defined by the System Operator.

The location of the on screen clock is user definable and can be turned off altogether.)

## System Report

Print the system startup report. This can be done by selecting 'System Report...' from the Functions menu. The report will be displayed in a dialog box (as illustrated) from where it can be printed.

*In the event that the system is 'Auto-Launched', you will be presented with a dialog asking if it is OK to print the startup report. It warns you to ensure that the printer is on first.*



(**Note:** The system startup report is created during the previous nights shutdown sequence. It lists:

- a/ The status of the system backup. (If the function is enabled.)
- b/ The names and phone numbers of those who have late equipment.
- c/ Equipment that was automatically put back ON LINE today because the Off Line date had expired.
- d/ Equipment that is coming ON LINE tomorrow.
- e/ Any chemistry that needs remixed. (If the function is used.)

*As more functions are added to the system, this list will vary.*

Technicians in charge of equipment should be informed of any change in the status of equipment so that they may verify that the item should be back ON LINE, or if it should be taken OFF LINE for a few more days.

Chemists in charge of remixing chemistry should be told which items need to be taken care of.

If the system is printing to triple sheet NCR paper then each copy can be given to a specific person, with one being retained for the System Operator to view.)

The system is now launched and you are open for business.



# Reservation and Checkout

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These two functions are identical except for a couple of things, which will be explained in context.

## Make a Reservation

To make a reservation or checkout, you select the function requested by clicking on the appropriate on-screen button.

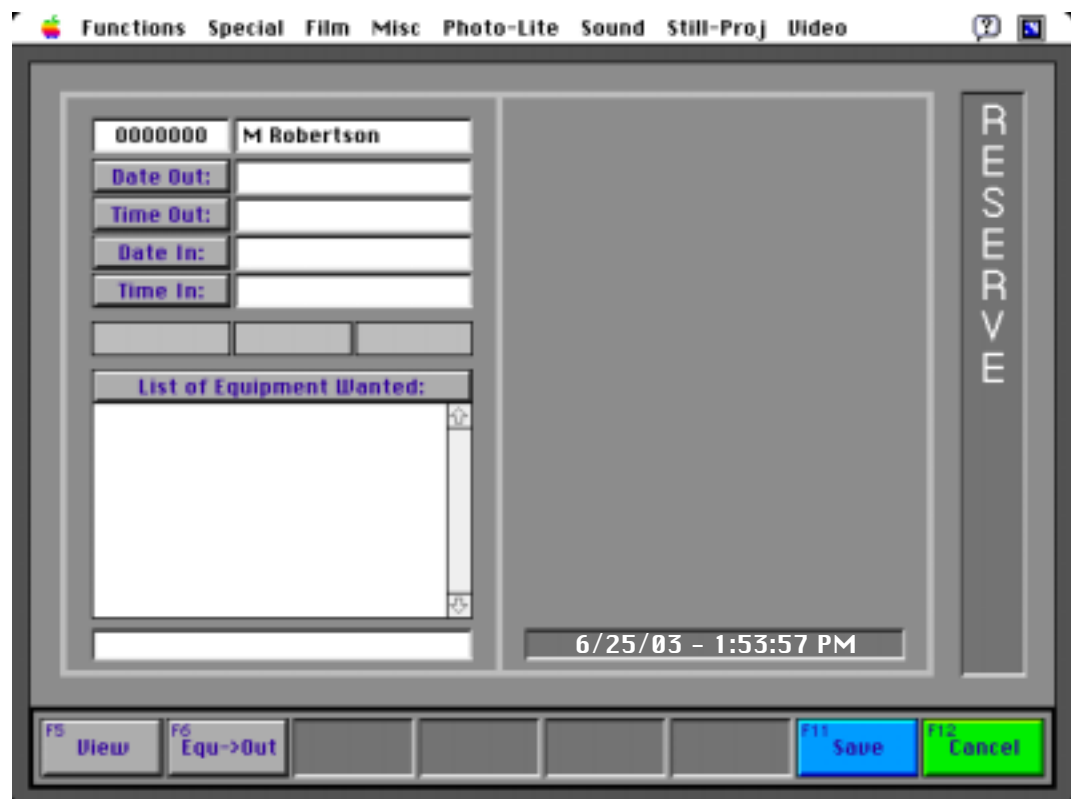
(*Note:* For this section 'Reservation' has been chosen.)



## Enter ID number

You will then have to enter the ID number of the person wanting equipment. If the ID number is valid, it along with the persons name will be entered into the reservation screen. (As illustrated below.)

Please enter the ID# you want to use in 'Reserve'?



(*Note:* This illustration shows the menu bar when the 'Apple' Apple menu is NOT disabled. Notice also that in the top right corner you now have access to any other applications that are currently running.)

From here the sequence for making a reservation is fairly straight forward.

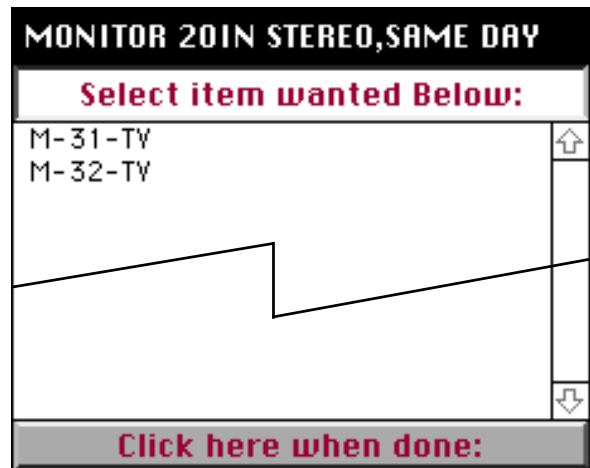
**Select Equipment Type**

Select the equipment type that the person requested from the menu bar, e.g. 'Monitor 20IN Stereo' which is under the 'Video' menu in this fictitious system. You will then be presented with a list of equipment currently available for that type. The equipment type and access will be the title of the list. This list is displayed in the gray area opposite the persons name. Only items that are currently ON LINE are displayed.



**Select Equipment Number**

Select the equipment number that the person wants, e.g. 'M-31-TV'. Clicking on 'Click here when done:' will hide the list. (Note: Double-clicking on an item has the same affect.) Other menu items can be selected while this list is displayed and the content and title will be updated to reflect the new item selected.



Each item selected is then entered into the field below 'List of Equipment Wanted:'. You can repeat this process for the number of items the person wants.



(Note: If there is only one equipment number available for the type selected from the menu bar, then it will be put directly into the field.)

**Date and Time**

When all the equipment has been selected, you have to enter the dates and times that the person wants to reserve the equipment for.

(Note: A date or time is selected simply by clicking on the one wanted when it is presented in a dialog box on the screen.)





## Set Time in

Lastly the 'Time In:' dialog is displayed. You will only be presented with times that do not clash with that already entered, e.g. 9:00 AM. The return time options in this case will be between 9:30 AM and 9:30 PM.

(*Note:* An item can be returned at closing time.)

*We will assume that the person wants the equipment item until 4:00 PM.*


(*Note:* If you want to cancel the sequence of selecting the dates and times, then it can be done by clicking on the 'Out:' or 'In:' button in the top / left of each dialog.)

In:			4:00 PM
			4:30 PM
			5:00 PM
	9:30 AM		5:30 PM
	10:00 A		6:00 PM
	10:30 A		6:30 PM
	11:00 A		7:00 PM
	11:30 A		7:30 PM
	NOON		8:00 PM
	12:30 P		8:30 PM
	1:00 PM		9:00 PM
	1:30 PM		9:30 PM
	2:00 PM		
	2:30 PM		
	3:00 PM		
	3:30 PM		

The reservation card on the left hand side should now look like this.

You are now free to add new equipment or edit the dates and times, if the person requesting the items changes his/her mind.

(*Note:* A piece of equipment can be deleted from the 'List of Equipment Wanted:' just by clicking on it. All items can be deleted by clicking on the 'List of Equipment Wanted:' button itself. In the event that all the equipment is removed from the list then the dates and times will be blanked out.)

<b>Date Out:</b>	6/27/03,Fr
<b>Time Out:</b>	9:00 AM
<b>Date In:</b>	6/27/03,Fr
<b>Time In:</b>	4:00 PM
<b>List of Equipment Wanted:</b>	
M-31-TV	

## Save Reservation

The reservation is ready to be saved. This is done by selecting the 'Save' button at the bottom of the screen.

When the reservation is saved, you will be presented with a dialog box asking you what you want to do next.

'Done' will take you back to the 'Main Menu' Screen.

'New Res' will blank the equipment

and date / time fields and allow a new reservation to be made for the same person.

'New W/Equ' is similar except that it keeps the currently selected equipment. This would be used if the person wanted the same equipment on more than one occasion.



<b>Reservation is now complete. How would you like to proceed?</b>		
<b>New W/Equ</b>	<b>New Res</b>	<b>Done</b>

**Special Reservation Features** There are three special options that are usually hidden on the reservation card. These are 'Auto Res', 'Set Up' and 'Pick Up'. The reservation card normally looks like this:



But if the person has been given access to these three features then their card will look like this:



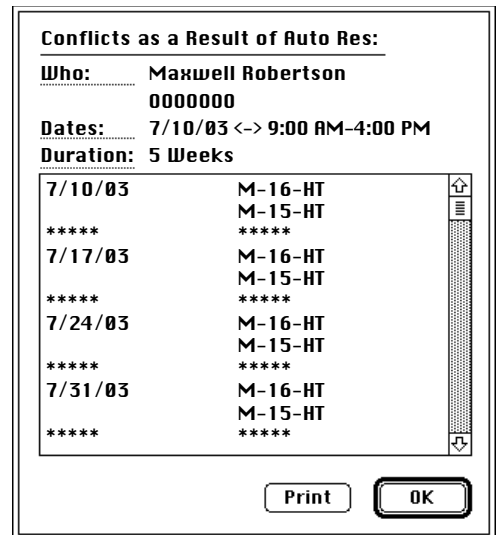
These features are used as follows:

**Auto Res**

If a person wants to reserve the same piece(s) of equipment for several weeks then 'Auto Res' can be used. You set up a reservation like you normally would, selecting equipment and entering the dates and times. However if you select 'Auto Res' it will ask you for how many weeks the person will want the equipment for. You can enter between 1 and 16 depending if there is a date limit active for the system. The system will then try and reserve all the equipment selected for the number of weeks requested, starting with the dates and times entered. (*Note:* The date entered is considered week 1.)

Upon completion two things can happen:  
 1/ You will be asked how you would like to proceed.

2/ You will be displayed a dialog containing the list of problems the system encountered while reserving the equipment, e.g. In this example for four (4) of the five (5) weeks 'M-16-HT' and 'M-15-HT' are not available, however all the other equipment was reserved for the times entered. You would now print the list of conflicts and try and find other equipment for those dates and times. (*Note:* When making an 'Auto Res', the equipment can only be reserved for the same day, e.g. 9:00 am - 4:00 pm on 7/10/03. It cannot go out overnight or for multiple days.)



**Set Up**

If someone requests equipment, but needs it at a certain location, e.g. a lecturer needs a film projector in a classroom, then 'Setup' can be used to code the reservation as such. When you select it, you will be asked what room number that the reservation needs to be set up in. The answer will be stored with the reservation. In '? Res' you can see

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what reservations are on file for people. They normally have a code like this: '7/5/03,4:30 PM,7/5/03,9:30 PM,NORM', however if you make a 'Setup' for room 123 then this reservation would appear as '7/5/03,4:30 PM,7/5/03,9:30 PM,NORMS123'.

## Pick Up

'Pick Up' works in a similar way. If a person makes a special request that must be available and ready to go at a certain time, then you can code it as a 'Pick Up'. There is no room number associated with it since the person is still going to pick the equipment up themselves but it is special. So the above reservation coded as a 'Pick Up' would appear as '7/5/03,4:30 PM,7/5/03,9:30 PM,NORM P'.

(*Note:* Both 'Set Ups' and 'Pick Ups' can be queried using 'Print Setup/PickUp...' in the Functions menu.)

## Checkout differences:

With a Checkout the sequence is exactly the same except that the date and time out are supplied for you when the card is accessed. This is because a Checkout happens NOW. So the system knows when the person wants the equipment for and automatically enters the current date and time out for you.

Date Out:	7/5/03,Sa
Time Out:	4:30 PM
Date In:	
Time In:	

(*Note:* The 'Date Out:' and 'Time Out:' buttons are disabled, since they are not required.)

## Reservation

If the person requesting equipment already has it reserved, then you will be presented with the 'Premade Reservation' list. Selecting any part of the reservation by clicking on it will automatically enter the data into the Checkout card. Selecting 'Click here when done:' will hide the field.

Multiple reservations can be selected one after the other, but if the times do not match then the return date and time are left blank. Any expired reservations for that date, that have not yet been deleted, are also displayed.

(*Note:* Double-clicking on an item will hide the field.) Selecting a new type from the menu bar will update the field title and content respectively.

Reason(s) 'M-31-TU' is not available:

Out Date/Time:7/5/03,4:30 PM
In Date/Time:7/5/03,9:30 PM
NORM
M-31-HT
M-32-HT
M-34-HT
M-35-HT
M-36-HT
M-4-HT
M-14-LE
M-15-LE
M-8-LE
Out Date/Time:7/5/03,11:00 PM
In Date/Time:7/5/03,11:30 PM
NORM
M-13-HT

Print OK

## Accessories and Cables

There are two items that are only available for checkout. These are 'Accessories' and 'Cables'. These items may or may not be available on your system, the location on the menu bar will vary also, since it is programmable. 'Accessories' is used to hold generic

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items, e.g. 'Extension Cord', 'Cart', and 'Cables' is used to hold any special cables that are used to connect equipment together, e.g. 'BNC->BNC'. In both cases the items are treated as an unlimited supply, that is you can add them as many times to the Checkout card as required, e.g. if you add 'Cart' to the equipment list then it will appear as 'Cart' however, if you add it again it will then appear as 'Cart \* 2'. The '\* #' will increase each time you add it. Apart from this, both items are treated as a regular piece of equipment.

## Save

The only other difference is after you select 'Save', the system saves the data and then creates an 'Agreement Form' for the items checked out, which is displayed when the 'Save' is completed. (An illustration below.)



The screenshot shows a software window with a menu bar: Functions Special Film Misc Photo-Lite Sound Still-Proj Video. The main area is divided into several sections. On the left, there's a form for user information: ID 0000000, Name Robertson, Maxwell, Phone# 555-111-1111, Date Out 6/25/03, 3:30 PM, and Return Date 6/25/03, 7:00 PM. Below this are buttons for 'Only Form' and 'Current'. On the right, there's an 'Equipment:' list containing 'H-32-TV'. A vertical sidebar on the far right is labeled 'FORMS'. At the bottom, there's a toolbar with buttons: F5 View, F10 Print, F11 Return, and F12 Done.

From this card, you can print out the form. The person then signs it and it becomes a binding contract. If printed on triple sheet NCR paper, the signed copy is kept by you, one copy is kept by the person as a receipt so that he/she knows when the equipment is due back and the third can be used as an equipment pass. The later would be used if the location has security on duty that requires a valid pass before items can leave the building.

(*Note:* 'Agreement Form' is covered in more detail under 'Form'.)

(*Note:* There is also an optional 'Save Inv.' item associated with 'Checkout'.)

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## Optional Checkout Item

### Save Inv.

If the 'Rental' system is enabled in MacCheckout, then the 'Checkout' screen will have another button displayed. This is the 'Save Inv.' button as shown here.



This option also saves an 'Agreement Form' but is also saves an invoice associated with it. This is used in the circumstances where you need to bill the user for the equipment they are taking out. (*Note: Please check with your system administrator over the use of this item, if it is visible.*)

### Blind Typing

There is a hidden feature that is part of adding equipment to a Reservation, Checkout or Agreement card. If you know the ID number of the piece of equipment, then you can just type the number on the keyboard, hitting the 'Return' key when you are complete. The system tracks the letters you type and when you stop, it tries to process the data as a valid equipment ID number. If the item is available then it will be added directly to the card. This is known as 'Blind Typing'.

### Problems

The preceding example represented a straight forward Reservation or Checkout. The next section presents some examples of what can go wrong and the solutions where possible.



# Reservation and Checkout Problems

## Late Equipment

If the person requesting the equipment already has equipment checked out that is overdue, then you will be warned of the fact and the person will not be allowed to reserve or check out anything until that equipment has been returned. There is no override for this.

**Solution:** Have the person return the equipment.

## Fine Card

If the person requesting the equipment has a fine for some reason, then immediately after entering their ID number you will be presented with their 'Fine Card'.

The screenshot shows a software window titled "FINE DATA" with the following content:

Name:	Robertson, Maxwell
ID #:	0000000
Date:	6/25/03
Status:	Student
Phone #:	555-111-1111
Person's List of fines on file:	
\$20.00 -	
Checkout:	,
Return:	,
Actual Ret:	,
Overdue:	(1:0:0)
Abuse:	No

Location:		
CH - SAIC		
57 S. Wabash		
Equipment Information:		
M-31-TV	\$10.00	\$10.00
M-32-TV	\$10.00	\$10.00
Total: \$20.00		

At the bottom of the window are three buttons: "Print" (F10), "Override" (F11), and "Done" (F12).

(*Note:* A person can have a fine for two reasons, the equipment was returned late or the equipment was abused or damaged in some way and a fine was imposed. The above illustrates equipment being returned late. If the system imposed the fine then the date and time fields: 'Checkout:', 'Return:' and 'Actual Ret:' would also be filled out.)

From here there are three possible courses of action:

- 1/ Print the fine out so that the person can pay it.
- 2/ Cancel the procedure.
- 3/ Override the fine.

If option three (3) is chosen, you will be asked to supply your initials or pin number to verify that you are allowed to perform this function. If the initials or pin are accepted, then you will be allowed to proceed to the Reservation or Checkout card.

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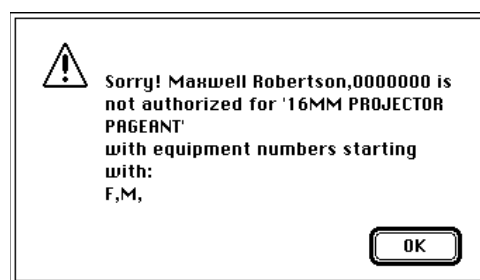
(*Note:* There is one exception to the override rule and that is if the fine has been on file long enough to become a 'Hold'. In that event the person will be locked out of the system until they take care of the fine. There is NO override available in that situation.)

**Solution:** The person must pay the fine or have it removed.

### Not Authorized

When an equipment type is selected from the menu, the system checks to see if the item is authorized or general. If it is authorized then the person wanting access to the item must be authorized for it. If the person is not, then the following dialog box will be displayed.

In this event the person is not authorized for '16MM PROJECTOR PAGEANT'. It also notes that there are two equipment codes available, 'F' and 'M'. This means that there are equipment items of this type whose numbers begin with both 'F' or 'M', e.g. 'F-1-SP' or 'M-1-SP'. So there are two possible items to be authorized for.

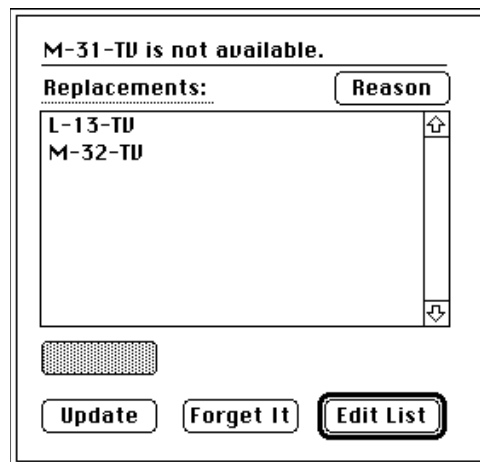


(*Note:* If the person was authorized for one of the items, e.g. 'M', then they would have been given 'M-1-SP'.)

**Solution:** The person must be authorized for the piece of equipment by being taught how to use it, then the authorization must be entered into the system.

### Item Not Available

When it comes time to save the Reservation or Checkout it is possible that the equipment will not be available because someone else has it checked out or reserved already. In that event, this dialog box will be displayed. (*Note:* The same reservation for 'M-31-TV' was entered into the system, as was entered earlier, then 'Save' was selected. This guaranteed a clash.)



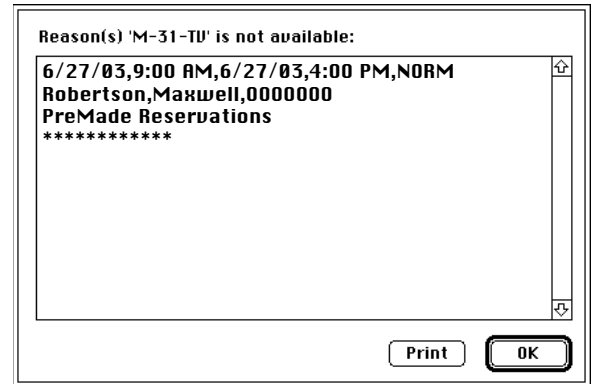
The items displayed in the scrolling list are items that are available for Reservation or Checkout. One of these can be selected and it will replace 'M-31-TV' (The item that is not available), and then the Reservation or Checkout request will continue until the data is saved.

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The other options on the 'not available' dialog are as follows:

**Reason**

'Reason' supplies a dialog explaining why the item is not available. In this example it is telling you that 'Robertson, Maxwell' already has a premade reservation for this item. (*Note:* There can be more than one reason, e.g. three (3) different people can have the same item reserved, one for each day, Mon - Wed. If someone tries to reserve the same item from Mon to Wed, then this dialog would hold three (3) reasons why the person cannot have the item.)



There are three (3) codes why an item is not available:

'Checked Out' = someone has the item currently checked out.

'Other Reservation' = someone else has the item reserved for times that clash.

'PreMade Reservation' = the same person already has the item reserved.

**Edit List**

'Edit List' aborts saving the Reservation or Checkout and allows the user to change the dates and times or equipment selected.

**Forget Item**

'Forget Item' removes the item from the list and proceeds to complete the Reservation or Checkout, e.g. someone may want to Checkout a Video Camera and a Tripod but the Tripod is not available. The person may then decide that he/she does not really need the Tripod, so it can be 'Forgotten' and the Checkout can be completed just for the Video Camera.

**Update**

'Update' comes up when the only reason for an item not being available is because of a Premade reservation for the same person. This allows you to automatically delete the reservation on file and replace it with the new request.

**It's Here**

'It's Here' (Is not shown in the illustration but it would be in place of the grayed out button.) comes up when the only reason an item is not available is because the item is checked out. This can be used to automatically return the item. The reservation or checkout will then proceed.

(*Note:* This should only be used if the item can be seen, e.g. it was returned in the real world but no one told the computer. Otherwise you will lose the record of who actually has it checked out. It is not a feature to be used lightly. That is why there is an option to turn it off altogether. If you never see this then that is the reason why.)

**Solution:** There is none. If no equipment is available for the times the person wants it for, then the person making the request has to alter his/her plans.

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**Time Limits** Equipment types can have restrictions placed on them regarding how many hours per week they can be reserved. In the event that the person reaches the limit, he/she will not be allowed to reserve the item and you will be informed of the limit and how many hours the current request will exceed that limit by.

**Solution:** Shorten the length of the request if possible or find another item. The limit is based on each item, not on every item in the type. So the person can reserve each item in the type up to the hour limit.

**"Can be" versus "Cannot be" Checked Out** Equipment types can be coded if they can be checked out or not. In the event that you try to reserve two items, one which can and the other which cannot, be checked out, then you will be informed that these items cannot be added to the same reservation.

**Solution:** Make two separate reservations.

*(Note: You cannot check out an item that is coded as 'not for checkout'.)*

It should be noted that reservations for items that 'Cannot be Checked Out' are different from regular reservations. Regular reservations expire after 30 minutes. If someone is 30 minutes late then anyone requesting the equipment can have it. Reservations for items that 'Cannot be Checked Out' do NOT expire. They are in place until the end of the reservation. This feature can be used to reserve items that cannot be physically checked out. An example would be a classroom that needs to be blocked out for certain times due to classes that are taught in it. At any other time anyone can use the space. This would ensure that there would be no scheduling conflict.

**Other possible problems:**

These are grouped together because they may or may not apply to your system. They depend on whether the System Operator has decided to use the features or not.

**Restricted Access** If someone has 'Restricted' access to the system, then when you select a type of equipment from the menu bar, the system looks to see if the item is on the list of equipment that people with 'Restricted' access have access to. If it is not, then you will be informed that the person cannot have the equipment because of their access level.

**General Access** Similarly, if someone has 'General' access to the system, then when you select a type of equipment from the menu bar, the system looks to see if the item is on the list of equipment that people with 'General' access have access to. If it is not, then you will be informed that the person cannot have the equipment because of their access level.

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**Schedule**

If you try and reserve or check out a piece of equipment for times that clash with an existing 'Schedule', then you will be informed of the scheduling problem and the person requesting the item will have to adjust their request accordingly.

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# Form

When someone checks a piece of equipment out it is stored on an 'Agreement Form'. There is one form for each Checkout made. These forms stay on file until the equipment is returned. To access these forms you can select 'Form' from the 'Main Menu' screen.

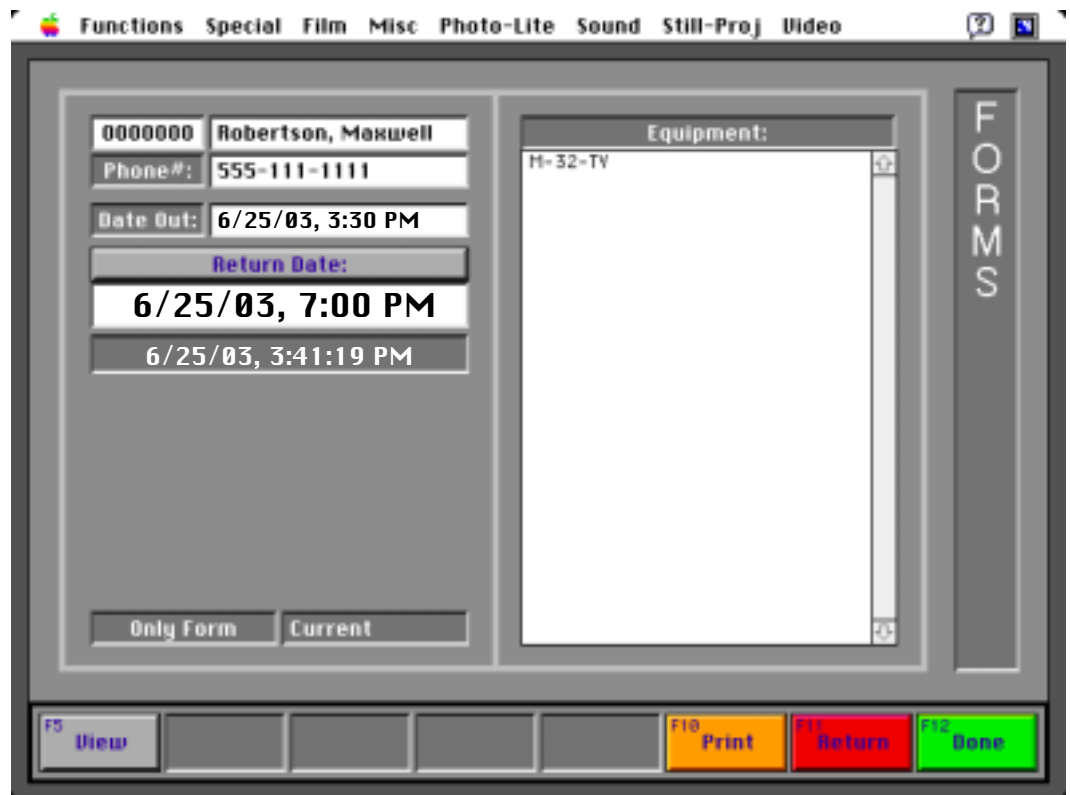


## Enter appropriate ID number

There are two ways to access a particular form. The most common is to enter the ID number of the person who has the item checked out. The other is to enter the ID number of the piece of equipment being returned. In this scenario entering '0000000' or 'M-32-TV' will result in this 'Agreement Form' being displayed.

Please enter the ID or Equip # you want to use in 'AGMT's':

OK CANCEL



The screenshot shows a software window titled 'FORMS' with a menu bar containing 'Functions', 'Special', 'Film', 'Misc', 'Photo-Lite', 'Sound', 'Still-Proj', and 'Video'. The main area is divided into two panes. The left pane contains a form with the following fields: ID '0000000', Name 'Robertson, Maxwell', Phone '#: 555-111-1111', Date Out '6/25/03, 3:30 PM', Return Date '6/25/03, 7:00 PM', and a timestamp '6/25/03, 3:41:19 PM'. Below these fields are buttons for 'Only Form' and 'Current'. The right pane is titled 'Equipment:' and contains the text 'H-32-TV'. At the bottom of the window is a toolbar with buttons for 'F5 View', 'F10 Print', 'F11 Return', and 'F12 Done'.

(*Note:* The ID number of the piece of equipment will always result in the actual form being displayed, since an item can only be on one 'Agreement Form' at any given time. However, entering the ID number of a person will result in the oldest 'Agreement Form' on file for that person to be displayed. This may or may not be

the form you actually require since the person may have more than one on file. If the person has more than one form then the label 'Only Form' will change to a button with the title being 'Form # of #'. With '# of #' being the current form number of that person being displayed out of the total number of forms on file. Clicking on the button will display the next form in sequence. In the event that the equipment is late then 'Current' will be replaced by 'Late>>Return' and the date and time that the equipment was due back will be colored red.)



### Renew

To 'Renew' an 'Agreement Form', you would click on the 'Return Date:' button. You will then be presented with the same date and time dialogs as

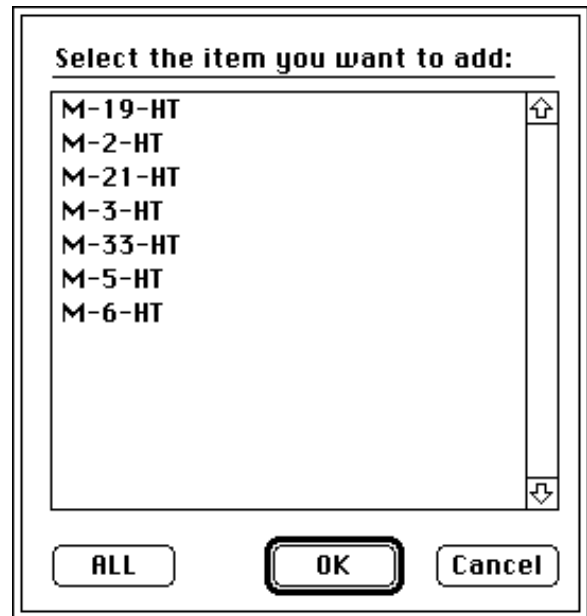


in Checkout. The same rules apply about the access time for equipment and you will only have to supply the new return date and time.

(*Note:* You cannot 'Renew' an 'Agreement Form' if the equipment is overdue. The same is true, if the person has more than one 'Agreement Form' and one of the other ones is overdue.)

### Adding Equipment to an "Agreement Form"

Equipment can be added to an 'Agreement Form' at anytime. You just select the equipment type from the menu bar. You will then be presented with a dialog similar to this one. It contains all the equipment items of that type that are currently available for Checkout. You will be notified if there is no equipment of a type available. You will also be informed if the access time for the selected equipment is shorter than the length of time the equipment is being taken out for. (*Note:* If you add an 'Accessories' or 'Cables' item to an 'Agreement Form', you will also be asked how many of those items the person wants.)





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## Return

Returning equipment is done by selecting the item on the scrolling list that is to be returned and then clicking on the 'Return' button at the bottom of the screen.

(*Note:* If you have multiple items in the list then you can click and drag the mouse to select all them all. Similarly if you click on one already selected, then it will be deselected. You can also click and drag while deselecting items.)



If the 'Agreement Form' that the equipment is on is not overdue, then three things can happen:

- a/ If the person returning the equipment has another 'Agreement Form' on file then it will automatically be displayed.
- b/ If the person returning the equipment has no other 'Agreement Form' on file then you will be taken back to the 'Main Menu' screen.
- c/ If some of the equipment is returned, then you will be left on the currently selected 'Agreement Form'.

If the 'Agreement Form' that the equipment is on is overdue, then once the equipment is returned, the 'Fine Card' that was created by the equipment being returned late is automatically displayed.

(*Note:* Depending on how the system is setup, it is possible for equipment to be returned late and have NO 'Fine Card' generated.)

## Optional Extras

There are currently three (3) optional extras associated with the 'Agreement Form', these are 'Email', 'Invoice' and 'Notes'. Both of these items need to be enabled by the System Administrator. If they are the following changes will be made to the on-screen display.

## Email

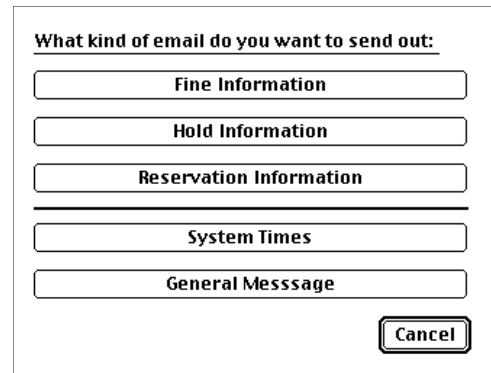
If 'Email' is enabled in MacCheckout, then an extra button will be displayed at the bottom of the screen. Selecting this, will allow you to send an email to the person who has the 'Agreement Form'



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Selecting the 'Email' button will display this dialog. This allows you select the type of email you want to send to the person associated with the 'Agreement Form'. They need to have a valid email address for this to work correctly.

'Fine' or 'Hold' will send the relevant 'Fine' and / or 'Hold' information currently on-file for the person.



A dialog box titled "What kind of email do you want to send out:" with five radio button options: "Fine Information", "Hold Information", "Reservation Information", "System Times", and "General Message". A "Cancel" button is located at the bottom right.

'Reservation Information' will send a list of the current reservations associated with the person

'System Times' will send the current operating times entered into MacCheckout.

'General Message' will allow you to send a general text message to the person.

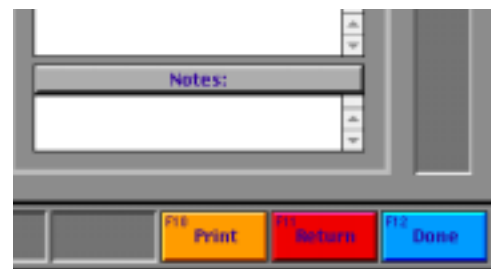
## Invoice

If 'Invoice' is enabled and one has been assigned to the 'Agreement Form' during the checkout procedure, then the 'Invoice' button will allow you to print it out.



## Notes

If 'Notes' are enabled, then you will be allowed to attach a text note to each 'Agreement Form' that is pertinent to the situation, e.g. A special request.



## Blind Typing

There is a hidden feature that is part of adding equipment to an 'Agreement Form'. If you know the ID number of the piece of equipment, then you can just type the number on the keyboard, hitting the 'Return' key when you are complete. The system tracks the letters you type and when you stop, it tries to process the data as a valid equipment ID number. If the item is available then it will be added directly to the 'Agreement Form'. This is known as 'Blind Typing'.

# Find ID

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The System is driven by ID numbers. These numbers are assigned to both people and equipment and there may be occasions where you will need to find out a persons ID number or refer to the ID card of a person or piece of equipment.

This can be done by selecting 'Find ID' on the 'Main Menu' screen.



You will then be presented with a dialog box which will accept four types of data:

- a/ A valid ID number for a person
- b/ A valid ID number for a piece of equipment
- c/ The last name of a person
- d/ The partial last name of a person with the '\*' character at the end.

Please enter the ID or Equip # you want to use in 'FIND ID':

OK CANCEL

If you enter the last name of a person then the system will generate a list of all the people with that last name. You will then be able to see the ID number of the person requesting the equipment.

(*Note:* 'Robertson' was the last name entered to generate this list.)

List of People matching Query:

Robertson, Beth, 0000001	↑
Robertson, Maggie, 0000002	
Robertson, Maxwell, 0000000	↓

If you enter a partial last name of a person with the '\*' character at the end, then the system will generate a list of all people whose last names begin with the letters entered.

(*Note:* 'Roberts\*' was the partial name entered. If you forget the '\*', then 'Roberts' would be the last name searched for. This can be used if you do not know how to spell a persons name. At least one (1) letter must be supplied before the '\*'. The routine is optimized to use three (3) letters, e.g. 'ABC\*'.)

List of People matching Query:

Roberts, Alisha, 0000003	↑
Roberts, Elizabeth, 0000004	
Roberts, Elizabeth, 0000005	
Roberts, Kim, 0000006	
Roberts, William, 0000007	
Robertson, Beth, 0000001	
Robertson, Maggie, 0000002	
Robertson, Maxwell, 0000000	↓

In both the above examples you can double-click on a name and the ID card for that person will be displayed.

If you select a name by clicking on it once and then click on a function button, e.g. 'Checkout' then the ID number and the name of the person selected will automatically be transferred to the Checkout card and that card will be displayed.

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Entering either the ID number of a person or the ID number of a piece of equipment will display the ID card for that item.

System Related		Personnal	
ID #:	0000000	Fines:	
Last Name:	Robertson	Reservations:	
First Name:	Maxwell	Equipment Authorizations:	
Email Addr.:	mrobertson@hotmail.		
Status:	Employee		
Dept.:			
Overnight:			
Access:	Open		
Limit:			
Days:			
Ban Until:			

F5 View F6 Email F7 Find ID F8 ? Res F9 Reserve F10 Checkout F11 Form F12 Done

Above is an example of a persons ID card. The picture in the upper right will only appear if the persons image is on file, otherwise there will be a white rectangle with a black frame and black diagonal lines from corner to corner.

This card denotes that 'Access:' is disabled and that 'Reservations:' is enabled. The cards on your system will vary depending on the options that the System Operator has selected. In the case of 'Reservations:' it is only enabled if the person has reservations on file. This button is used to print them.

Data on this card can be changed but you must have the correct access to be able to do that. The access is dependent on what options that the System Operator has selected. Each button will ask you to enter your initials or pin number before you can edit any of the data.

If the person has a fine on file, the card associated with it can be displayed simply by double-clicking on the fine amount. You will have to enter your initials to be able to do this.

The three cryptic items are 'Limit:', 'Days:' and 'Ban Until'.

'Limit:' is a date that is used to denote the last date that a person can reserve or check out equipment on, e.g.'7/31/'03'..

'Days:' is the number of days in advance that a person can reserve equipment, e.g.

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'7' days or one week in advance.

'Ban Until' allows you to set a date. This is the date that the person will be locked out of the system until. This cannot be overridden.

### Personnal

If you have the appropriate access then the 'Personnal' tab will allow you to access the personal data records for the current ID number being accessed. This card will look something like this:

The screenshot shows a software interface with two tabs: 'System Related' and 'Personnal'. The 'Personnal' tab is active, displaying a list of fields and their corresponding values. To the right of the fields is a small portrait photograph of a man. On the far right, there is a vertical label 'FIND ID'. At the bottom, there is a row of function buttons labeled F5 through F12.

Field	Value
ID #:	0000000
Last Name:	Robertson
First Name:	Maxwell
Email Addr.:	mrobertson@hotmail.
Address:	207 Greystone Rd
Apt#:	
City:	Carlisle
State:	IL
Zip:	12345
Phone #:	123-1234
Soc Num #:	***-**-*****

Buttons: F5 View, F6 Email, F7 Find ID, F8 ? Res, F9 Reserve, F10 Checkout, F11 Form, F12 Done

You need the appropriate access to be able to change any of these records.

This close-up shows the top part of the interface, including two input fields: 'Limit:' with the value '7/31/03' and 'Days:' with the value '7'. Below these are the function buttons: F5 View, F7 Find ID, F8 ? Res, F9 Reserve, F10 Checkout, F11 Form, and F12 Done.

(*Note:* At any time the functions, e.g. 'Reserve', 'Checkout' can be selected and the current persons name and ID will be transferred to that function.)

The above is an example of an equipment ID card.

(*Note:* The data under 'Type Global data:' can be viewed but cannot be edited when the system is launched.)

Each card should look similar to this with the exception of the 'Checked Out' button. That is only visible when the item is checked out. Clicking on it will display who has the equipment, their phone number and when it is due back. This card works similar to the persons ID card. You must have the correct access to be able to edit any of the data. The exceptions to the rule are 'Repair Log:', 'Reservations:', 'Last 6 users:' and 'Statistics:'. These tasks are read-only, no data can be edited or deleted, only viewed. So there is no restrictions placed on their use.

# View

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One of the hardest things to do in the system is to match equipment and the people requesting it. This gets harder the more reservations that the system has on file. With this in mind 'View' was created. It is accessible from any card when the system is 'Launched'.



## Select Type

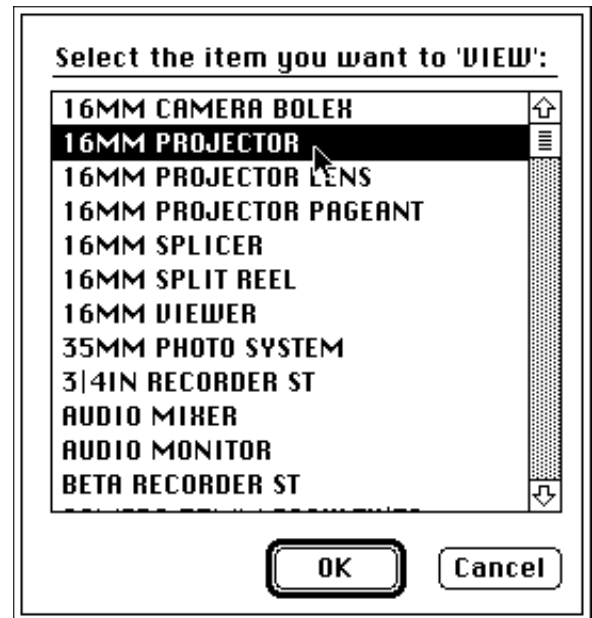
When 'View' is selected you will be presented with a scrolling list that displays every equipment type that is currently on file and can be reserved or checked out.

Items can be selected in several ways:

a/ Clicking on an item and then clicking 'OK'

b/ Double-clicking on an item

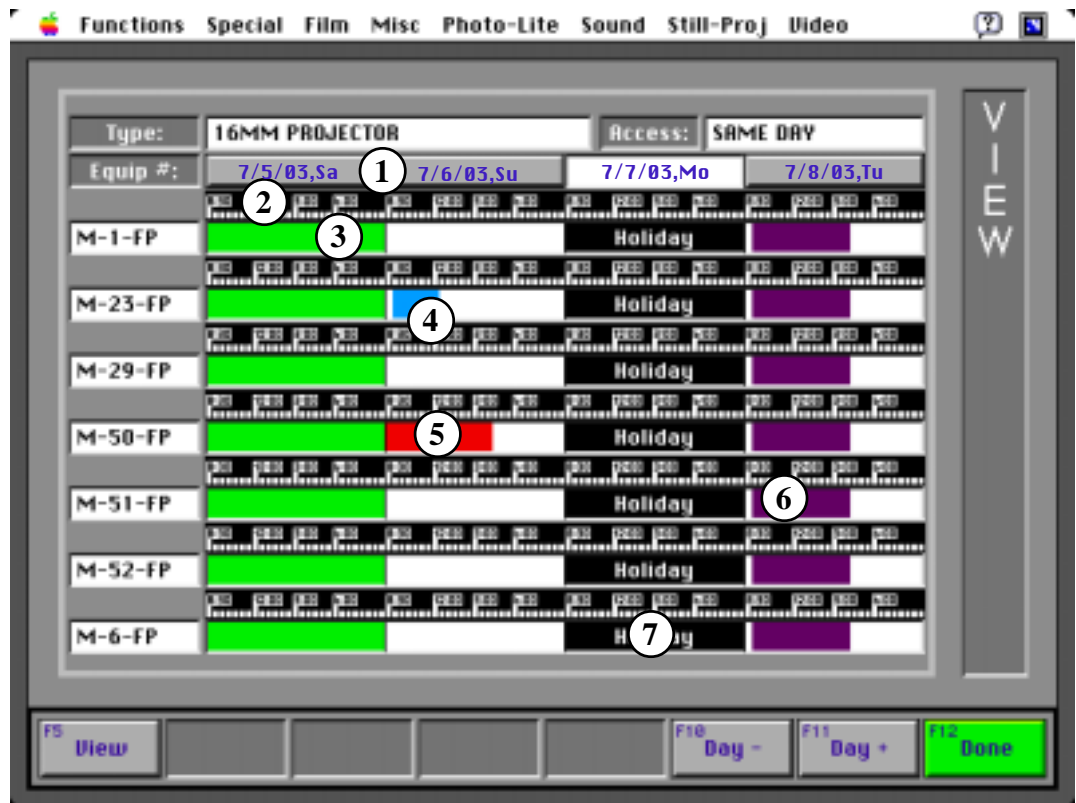
c/ Typing the first few letters of the items name, which selects it, and then clicking 'OK'.



*(Note: When an item is selected, the 'UP' and 'DOWN' arrows on the keyboard can be used to nudge the selection line up or down. Selecting the 'Return' key is the same as clicking the 'OK' button. If 'OK' is clicked when nothing is selected then it is the same as clicking 'Cancel'.)*

When the type is selected the system builds a list of all the items of that type that are available for reservation and checkout. It then builds a database of all the reservations on file for these items as well as their current status, e.g. is it currently checked out. It then displays that data on a grid that is four (4) days wide and seven (7) pieces of equipment tall. It also blocks out the days that the system is closed or on holiday.

(The following page has an example of this.)



The above example is for '16MM PROJECTOR' in our fictitious system. The access time for the type is in the top / right corner, e.g. SAME DAY.

Equipment numbers are listed under 'Equip #:'. In this example there are seven (7) items. If there were more, then the first seven (7) would be displayed and 'Equip -' and 'Equip +' buttons would be



visible. Clicking on these will page through the items, seven (7) at a time. The data cycles so if you click enough times you will come back to your original list.

Similarly the dates displayed start with today and the next three (3) days. Clicking on 'Day -' or 'Day +' will decrement or increment the date by four (4) days.

(*Note:* You cannot 'View' a date that has already passed.)

(*Note:* If a piece of equipment is checked out and is late coming back, then the equipment numbers, e.g. 'M-1-FP' will be displayed as a button. Clicking on it will tell you who has the item, the persons phone number and when it was due back.)



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The example has several numbers (1 - 7) placed on it and the following items reference those numbers:

1/ If you click on any of the four (4) date buttons, you can enter any date. Provided the date is valid, the display is updated to reflect the change. This can be used instead of having to increment the date by four (4) repeatedly to get to it. (*Note:* This is useful when you need to 'View' equipment a week or a month in advance.)

2/ This represents the time line for the days. It runs from 8:30 am to 9:30 pm and is divided into 30 minute intervals.

3/ When the first date displayed is today, this area is blocked out up to the current time. This stops you from inadvertently trying to reserve a piece of equipment for a time that has already passed.

(*Note:* On a color display it is colored green.)

4/ This illustrates a reservation. It runs from 9:00 am to 12:00 pm on 7/6/03. Clicking on the reservation will tell you who has it reserved, the persons phone number and the dates and times involved.

(*Note:* On a color display it is colored cyan.)

5/ This illustrates a checkout. It runs until 4:00 pm on 7/6/03. Clicking on the checkout will tell you who has it, the persons phone number and when it is due back.

(*Note:* On a color display it is colored red.)

6/ This illustrates a type that has a schedule associated. A schedule is a way of blocking access to equipment for set periods of time, e.g. A classroom is needed every Wednesday from 9:00 am to 4:00 pm for a class. A schedule can be made for that item for those times. It will remain in effect until the schedule is removed. This saves the System Operator from having to reserve that item for the same day of the week, every week. Clicking on the schedule block will tell you what the schedule is and the times involved.

(*Note:* On a color display it is colored purple.)

7/ This illustrates a holiday. The day is completely blocked out and no time slot on that day can be selected. If the system is closed on any given day, e.g. Sunday then it will be blocked out in a similar way except that 'Closed' will be displayed in place of 'Holiday'.

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## New Equipment Types

New equipment types can be selected in one of two ways. Either by clicking on the 'View' button again or by directly selecting the equipment type from the menu bar.

You select 'Done' when you are finished with 'View'. You will be taken back to the card from which the original 'View' selection was made.

*(Note: Currently 'View' is only for viewing data. No reservations or checkouts can be made from this card. So you have to remember when an item is available and enter the dates and times into the reservation or checkout card yourself. )*

*(Note: Normally 'View' displays equipment that is available for 'Reservation' or 'Checkout'. There is a system option that can be turned on that forces 'View' to also display items that are 'Off Line'. This is useful in the situation where you only have one piece of equipment for a certain type and it is currently being repaired. Normally the user would be informed that 'There is no equipment of this type available.' This message is not entirely correct since there is equipment of this type. With this option turned on, the piece of equipment would be displayed but the time line area would be grayed out and where 'Reservation' and 'Checkout' data normally appear, the label 'Off Line' would be displayed.)*

## ? Res

There may be times when you will be required to answer a persons question regarding what reservations he/she currently has on file. The persons reservations can be printed from their ID card but in the event that they only need to confirm a reservation has been entered or edit a reservation then '? Res' can be used.



### Enter ID Number

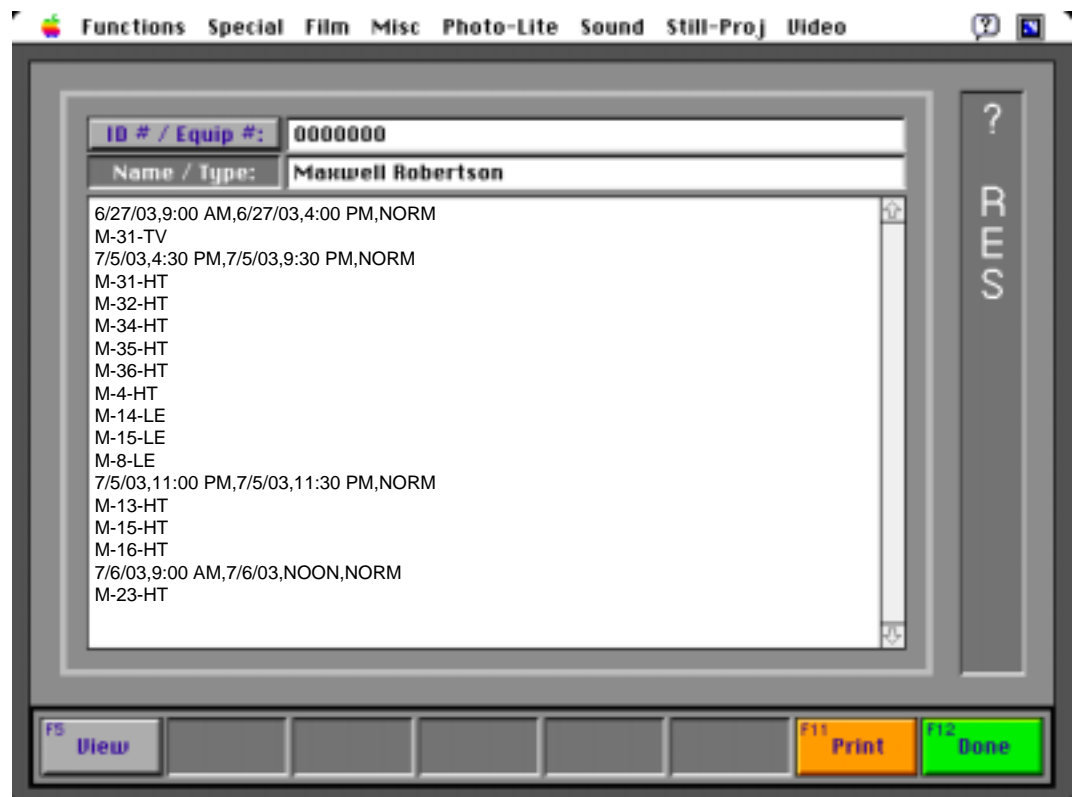
You enter the ID number of the person who has the reservation.

(*Note:* It also accepts equipment ID numbers. That will be covered later.)

Please enter the ID or Equip # you want to use in '? res':

You will then be shown a list of the reservations currently on file for the person.

(*Note:* All the example reservations in this illustration are **normal**. See the note in reservation about 'Norm S' (Set Up) and 'Norm P' (Pick Up) reservations.)



The dates and times of the reservation will be placed on one line and that will be followed by the equipment associated with that reservation. From here you can view, edit or delete all the persons reservations. Selecting a piece of equipment or the date and time line for a reservation will give

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you the following options:

**Select an equipment ID number** Selecting an equipment ID number, e.g. 'M-35-HT', will give you the option to edit the reservation or delete ONLY that item from the reservation.

**Do you want to edit the reservation containing, or delete,:**  
**M-35-HT**  
**from the reservation:**  
**7/5/03,4:30 PM,7/5/03,9:30 PM,NORM**

**Select reservation date and time** Selecting the date and time line will give you the option to edit or delete the whole reservation.

**Do you want to edit or delete reservation:**  
**7/5/03,4:30 PM,7/5/03,9:30 PM,NORM**

Editing the reservation transfers the reservation data selected from the '? Res' card to the 'Reserve \*\* Edit' card. The card works like the reservation card.

On the 'Reserve \*\* Edit' card, new dates and times can be set for the reservation or equipment can be added and deleted from the list.

When 'Save' is selected, all the persons reservations that clash with the new reservation being made are automatically updated to reflect the changes made. You can even end up with two completely different reservations on file. This can happen for the following scenario:

Edit Reservation for 'M-35-HT' that runs from '7/5/03,4:30 PM' to '7/5/03,9:30 PM'. Change the dates and times to '7/6/03,4:30 PM' to '7/6/03,9:30 PM' and save. This will result in two reservations being on file, both the original and the new. The original is left because the dates and times do not clash. It is up to you to remove the excess reservation if it is no longer required, when you are returned to the '? Res' card.

*(Note: In the event that the dates and times did clash then the new reservation would have replaced the old one.)*

As noted at the beginning of this section, equipment ID numbers can also be used. The same card is used to display the reservations. However if you select a reservation for a piece of equipment then you will only get the option of deleting it. This can be used to free up a piece of equipment that may be required elsewhere.

**Optional Item** - If enabled, you will also have an email button, that will allow to send an email to the person whose recorded has been accessed.

# Off Line (Repair Tag)

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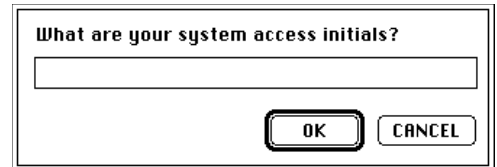
When a person returns a piece of equipment, you may be informed that it is damaged or does not work correctly. In that event the item must be taken 'Off Line' so that the technicians can repair it. 'Off Line (Repair Tag)...' is the option on the Functions menu that should be used.

It takes four (4) steps for you to take an item Off Line:

Select 'Off Line (Repair Tag)...' on the Functions Menu.

## Enter Initials

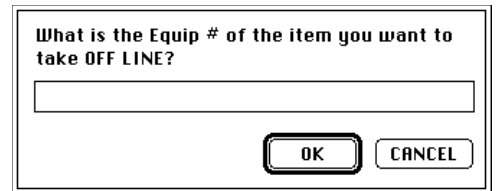
Enter your initials.



A dialog box with a title bar that reads "What are your system access initials?". Below the title bar is a single-line text input field. At the bottom right of the dialog are two buttons: "OK" and "CANCEL".

## Enter equipment ID number

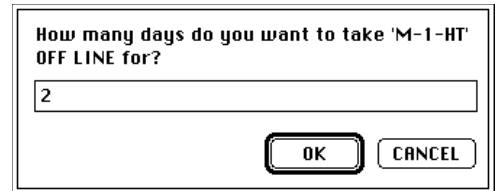
Enter the ID number of the piece of equipment that has the problem.



A dialog box with a title bar that reads "What is the Equip # of the item you want to take OFF LINE?". Below the title bar is a single-line text input field. At the bottom right of the dialog are two buttons: "OK" and "CANCEL".

## Enter number of days

Enter the number of days that the item should be taken 'Off Line'.  
(*Note:* The default is two (2). This usually gives the technician enough time to check the equipment out and see if it really has a problem or not.)



A dialog box with a title bar that reads "How many days do you want to take 'M-1-HT' OFF LINE for?". Below the title bar is a single-line text input field containing the number "2". At the bottom right of the dialog are two buttons: "OK" and "CANCEL".

When the above steps are complete, the system will take the item 'Off Line' and automatically print a 'Repair Tag' for the piece of equipment. It also prints a list of affected people. These people had reservations over the next few days which were deleted because the item has been taken 'Off Line'. This will enable you to assign new equipment to the people or to call, to inform them that the item is not available. The print out also includes the last six (6) users of the equipment. This enables the System Operator to track down who was using the equipment recently and who may have caused the problem.

A file is automatically created in the folder 'MacCheckout->Repair' which name is 'Repair->' and the first three (3) letters of the month and the year, e.g. 'Repair->JUN,2003'. An entry is added to the file stating the item was taken 'Off Line' on a certain date.

(*Note:* You cannot take an item 'Off Line' that is currently checked out.)

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# On Line

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When an item that is currently 'Off Line' has been repaired, it has to be brought back 'On Line' so that people may reserve or check it out.

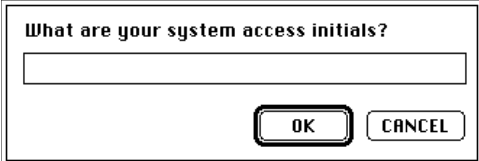
'On Line...' is the option on the Functions menu that should be used.

It takes four (4) steps for you to bring a piece of equipment back 'On Line':

Select 'On Line...' on the Functions Menu.

## Enter Initials

Enter your initials.

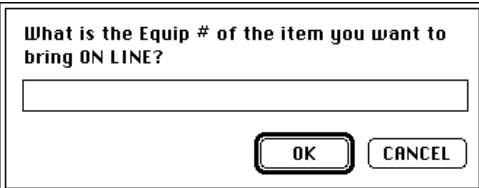


What are your system access initials?

OK CANCEL

## Enter equipment ID number

Enter the ID number of the piece of equipment that had the problem.



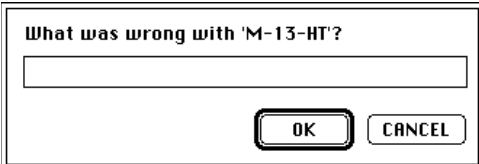
What is the Equip # of the item you want to bring ON LINE?

OK CANCEL

## Enter reason

Enter a brief description of what was wrong with it.

(*Note:* You can just select 'OK' if there was no reason for it to be 'Off Line'.)



What was wrong with 'M-13-HT'?

OK CANCEL

The item is then brought back 'On Line' and the reason supplied is stored in the current 'Repair' file.

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# Print Setup/Pickup

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Setups and Pickups are special reservations that have been requested by faculty or are to cover special events. Before 'ShutDown', the Setups and Pickups for the next day should be printed.

'Print Setup/Pickup...' is the option on the Functions menu that should be used.

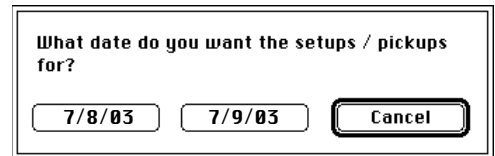
It takes three (3) steps for you to print this data:

Select 'Print Setup/Pickup...' on the Functions menu.

## Select Date

Select the date that the data needs to be printed for. You will be given today and the next date that the system is open to choose from.

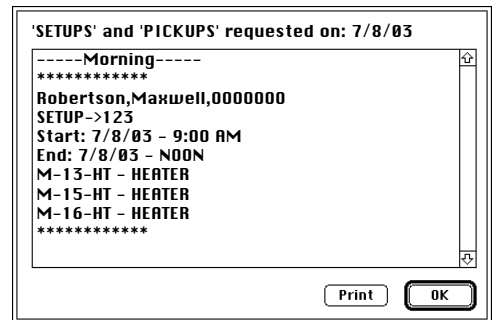
(*Note:* If you hold down the Option key while selecting the item from the menu bar, you will be presented with a dialog that will allow any date to be entered. The date must be valid and current. You cannot print Setups and Pickups for a date that has past.)



## Select Print

You will then be presented with a dialog that will list all the Setups and Pickups for the selected date.

Select 'Print' to print the data.



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# Authorization Lists

A person must be authorized to use any equipment that is coded as 'Authorized'. Periodically you may have to review a piece of equipment to see who is authorized to use it. Lists may need to be posted to inform people of their authorization status.

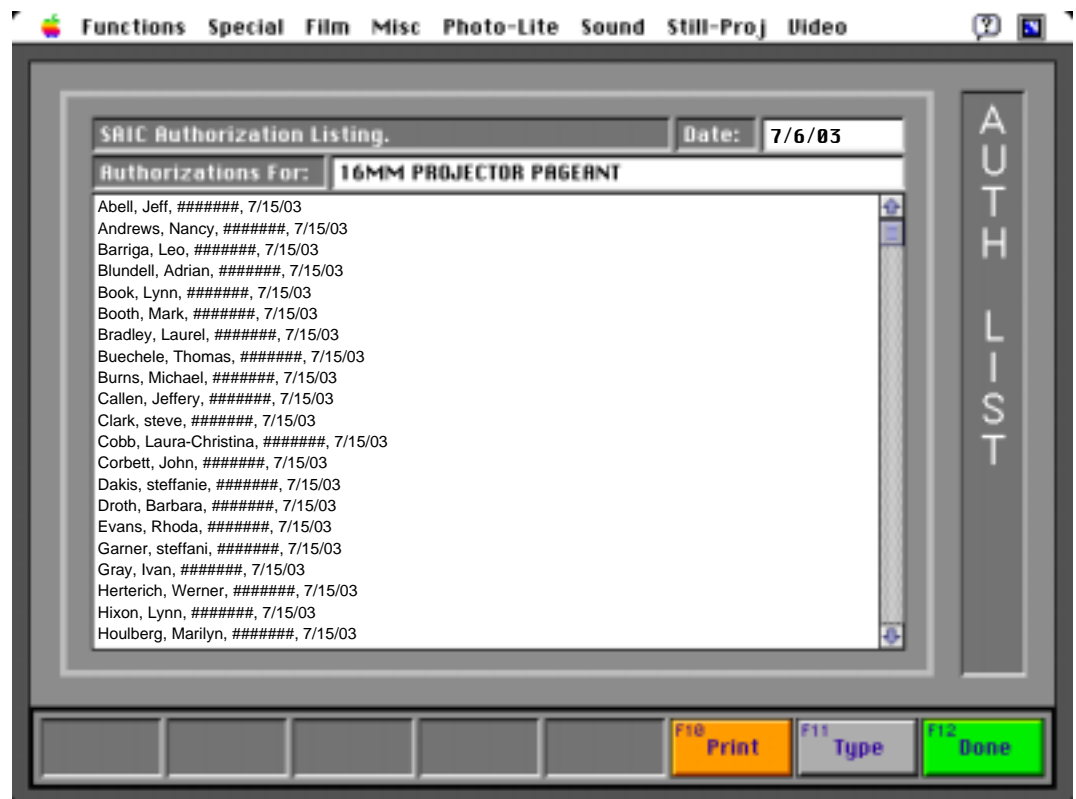
'Authorization Lists...' is the option on the Functions menu that should be used.

Selecting 'Authorization Lists...' will result in a blank screen with the following buttons being visible.



## Select Type

Selecting 'Type' will display a list of all the 'Authorized' equipment types in the system. You can then select one, e.g. '16MM PROJECTOR PAGEANT'. That will result in a list of all people authorized for that item.



(Note: '#####' will be replaced by the actual ID numbers of the people when you use it. The date at the end of each line is used to denote when the person may have access to the item until. In this case '7/15/03' is the current 'End of active Period' date, e.g. the end of the current semester.)

## Print

Selecting 'Print' will allow you to print this list.

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# Reservation Lists

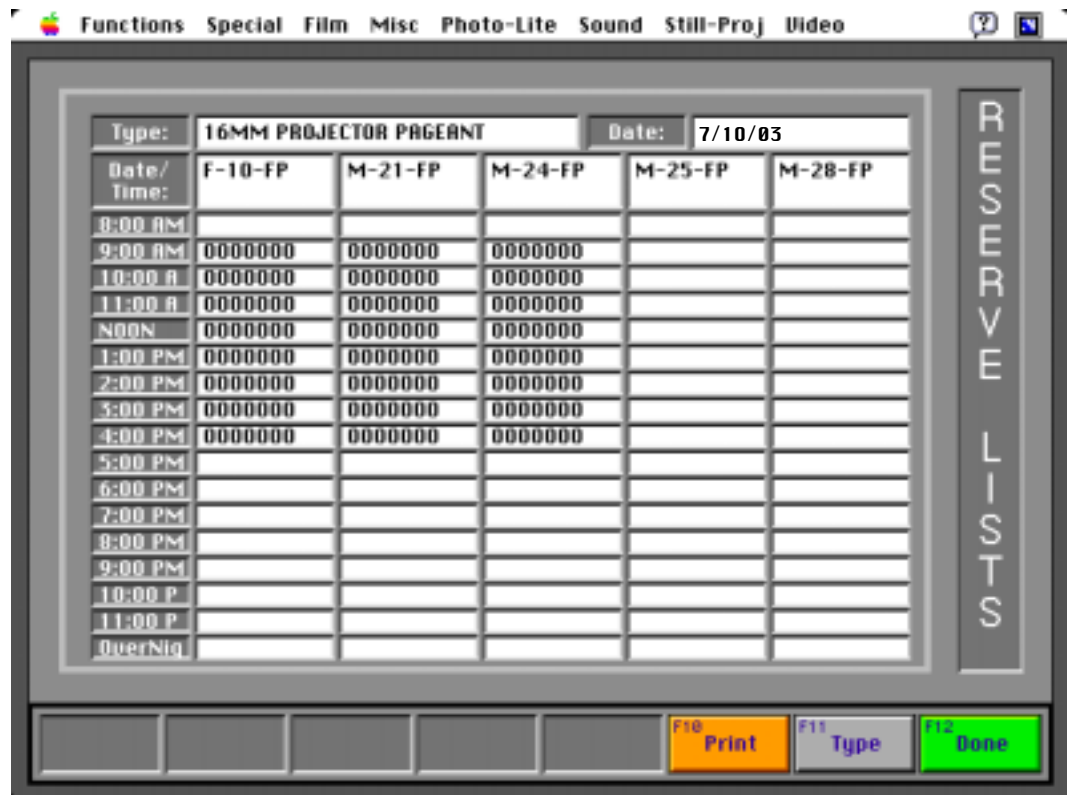
The system can be used to store reservations for equipment for as far in advance as required. The only limitation being the amount of memory and hard disk space available. One potential bottleneck is the conflict between checking out equipment and the demands of seeing what is currently available for someone who does not have a reservation. With this in mind 'Reservation Lists' was added to the system.

Selecting 'Reservation Lists...' will result in a blank screen with the following buttons being visible.



## Select Type

Selecting 'Type' will display a list of all the equipment types in the system. You can then select one, e.g. '16MM PROJECTOR PAGEANT'. That will result in the creation of a reservation listing for all the equipment of that type. (As illustrated below.)



The result is similar to 'View' but you can only see the reservations on file for today. The equipment numbers are laid out horizontally and the times vertically. (*Note:* If the item has a 'Schedule' associated with it, then that will be displayed also.)

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If there are more than five (5) pieces of equipment of a certain type then 'Equip -' and 'Equip +' buttons are added to the display to enable you to page through the different items available. The data cycles, so if you click enough times you will come back to your original list.



## Print

To help break the bottleneck noted on the previous page, 'Print' allows you to print these 'Reservation Lists' out. It lets you choose the equipment type you want and also select the date you require. It automatically gives you today and the next date that the system is open. If you require another date, then you can hold the option key down while selecting the equipment type and a dialog will be presented to you, that will allow you to enter any valid date. With this feature you are able to print each night, the 'Reservation Lists' for any equipment type that has heavy use, for the following day. During the day people are then able to look at the printout directly to see if any items of that type are available for the time periods they would like. This removes some of the strain on the computer system. People coming to the system to request equipment will automatically know the times that the item is open and that data can be entered into a Checkout directly, saving some time.

The only area of conflict with this is Reservation. After the sheet is printed out, if someone makes a new reservation on the system for the date printed out, then the printout is obsolete. So it is recommended that if you use this feature, then after it is printed out, all reservations for the day are done by signing up on the printout directly rather than going through the system. That way the record remains consistent and everyone can see who is signing up for what.

You select 'Done' when you are finished to return to the 'Main Menu' screen.

# Resale

There is a 'Resale' module built into the system, if you sell items at your location. This can be accessed by selecting 'Resale' from the Functions menu.

Selecting 'Resale' presents you with a blank screen with the following button options:



Taking the options in order from right to left:

## Done

'Done' will take you back to the 'Main Menu' screen.

## Load

'Load' is used to load the items that are available for resale. Selecting that will present you with a list of all the items that are currently on file. From here you can add, edit or delete items.

(*Note:* You will be asked to enter your initials before you can access this dialog.)

Resale data currently on file:			
Resale Items:	Price:	Account #:	Tax:
"A" CYANOTYPE	\$3.50	0-###-0000-##...	Yes
"AD" AMMONIUM D...	\$4.75	0-###-0000-##...	Yes
"B" CYANOTYPE	\$3.25	0-###-0000-##...	Yes
"GUM" GUM ARABIC	\$2.75	0-###-0000-##...	Yes
"SN" SILVER NITRATE	\$4.00	0-###-0000-##...	Yes
"UD" URAN DYKE BRD...	\$3.50	0-###-0000-##...	Yes
LAB FEE	\$60.00	0-###-0000-##...	No
LOCKER	\$3.00	0-###-0000-##...	No
COPY CARD	\$10.65	0-###-0000-##...	No
COPY CARD 20	\$20.65	0-###-0000-##...	No
COPY CARD RECHAR...	\$10.00	0-###-0000-##...	No

Tax %:

Clicking on an item will allow you edit or delete it. 'Add' can be used to add a new item, you will need to supply: what it is, how much will it cost, an account number and should it be taxed or not.

(*Note:* If any item is taxed then a valid percentage amount must be entered into 'Tax %:' so that it can calculate the correct values. )

## Sale

'Sale' will ask you to enter the ID number of the person who is purchasing the items. In the event that the person is not in the system, you will be asked to supply their first and last name. This is stored as part of the sale, so that the System Operator can track who is purchasing what. You will also be given the opportunity to add the person to the main database.

(*Note:* An actual 'Sale' will be dealt with on the following page.)

Please enter the ID# you want to use in 'Resale'?

## Report

'Report' presents you with a list of all the resale files currently on the hard disk. (*Note:* A resale file is made for each month it is used. The file name has the format: 'Resale->' and the first three (3) letters of the month and the the year, e.g. 'Resale->JUL,2003'. These files are stored in the 'MacCheckout->Resale' folder.) Selecting a resale file will print a columnar report presenting a breakdown of the

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items sold by number, account and price.

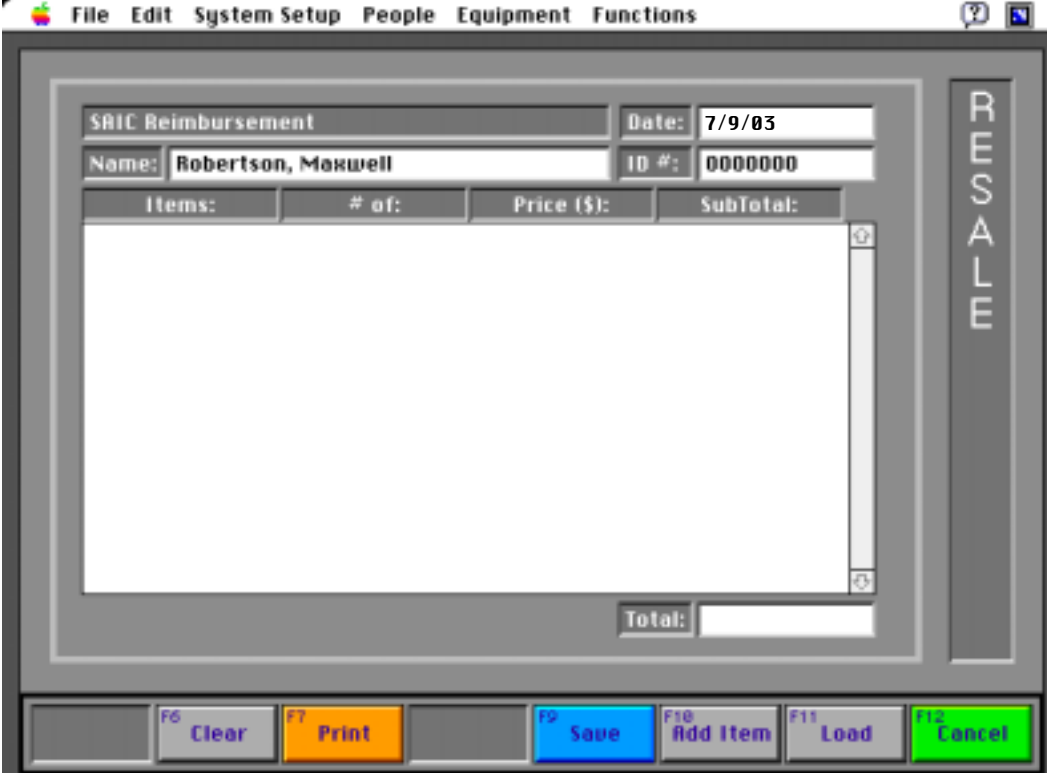
## Files

'Files' presents you with a list of all the resale files currently on the hard disk. Selecting a file will present you with a list of all the people who purchased something during that month. Selecting one, will give you the option to reprint or void the resale. A voided resale is NOT deleted, it is kept on file as a voided item and when a report is printed out, all voided items are noted at the bottom. This enables the System Operator to track all items being processed through 'Resale'.

## 'Sale' part II:

## Actual Sale

Upon selecting 'Sale' and entering a valid ID number you will be presented with the resale card. (As illustrated below.)



Items:	# of:	Price (\$):	SubTotal:

Total:

RESALE

Clear (F6) Print (F7) Save (F9) Add Item (F10) Load (F11) Cancel (F12)

(Note: All the button functions and names have changed with the exception of 'Load'. 'Cancel' now does the same as 'Done', it takes you back to the 'Main Menu' screen.)

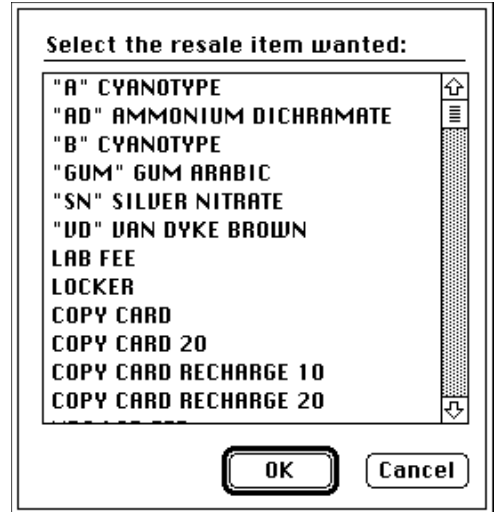


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The following is a breakdown of the new options added to the card:

**Add Item**

'Add Item' presents you with a list of the items currently on file for resale. Selecting any item will bring up an additional dialog asking you how many of that item the person would like. The process then automatically repeats itself until you select 'Cancel'.



As items are selected, they are added to the resale card and the running total is updated. (As illustrated right.)

Items	# of	Price /lb	Subtotal
"A" CYANOTYPE	2	\$3.50	\$7.01
"B" CYANOTYPE	2	\$3.25	\$6.51
"GUM" GUM ARABIC	1	\$2.75	\$2.99

Total: \$17.92

**Print and Save**

The resale card can then be printed using the 'Print' button and saved using the 'Save' button.

(*Note:* 'Save' automatically saves the data and takes you back to the blank 'Resale' card. So if you have not printed it before you hit the 'Save' button, you are warned of this fact. In the event that you 'Save' a resale card that has not been printed, then you can reprint it using the 'Files' option.

**Clear**

'Clear' can be used to delete any data that is currently on the 'Resale' card if you make a mistake or the person changes his/her mind. It leaves the date and the persons name and ID number on the card so that you can start again.

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## Usage Charts

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Built into the system is the capability to track the usage of two chemicals: E-6 and C-41.

(*Note:* More may be added as requested by users.)

This feature can be accessed by selecting 'Usage Charts' under the Functions menu.

Selecting 'Usage Charts' will leave you with a blank screen and the following options:



These options are as follows from right to left:

- Done** 'Done' returns you to the 'Main Menu' screen.
- Print** 'Print' presents you with the option to print the current usage chart for E-6 or C-41.
- Reset** 'Reset' will zero out the current usage value for the selected item. Either all of C-41 or All or part of E-6.
- Status** 'Status' presents you with the current status of the chemistry selected. This includes the amount of square footage left that it can process.
- Delete Usage** 'Del Usage' allows you to delete a record from the usage chart for the selected chemical, in the event that the person changes his/her mind.
- Get Usage** 'Get Usage' gives you current recommended development time for the chemical selected. This is based on the amount of film that has been processed by the chemistry and the amount that the current person is going to process. You will be asked to supply the person's ID number, the chemical in question, the film type and the number of sheets or rolls of film he/she is going to process. All of this data is added to the database and a valid development time in minutes and seconds is returned.  
(*Note:* You will not get a valid time if the chemical, in whole or part, needs to be remixed.)

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# ShutDown

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At the end of the working day the computer and peripheral equipment may have to be switched off. The actual system in the 'Launched' mode has NO 'Quit' command to prevent you from accidentally exiting the program. The program can be 'Unlaunched' and exited by selecting 'Quit' from the File menu. However, you must enter the password to 'Unlaunch' the system. Normally you will turn the system off by selecting 'ShutDown' from the Functions menu.

## **ShutDown**

'ShutDown' gives you two options:

## **Emergency**

'Emergency' would be used in the event of a fire alarm or other problem that requires that the computer be turned off immediately. You will be required to enter your initials if you choose this option. This will then automatically close any system related files, quit the program and turn the computer off.

*(Note: The 'Power Off' option is not available on all Macintosh™ computers. In the event that it is not, you will be left with the dialog stating 'It is now safe to ShutDown your computer' along with the 'Restart' option. It is then up to you to turn the power off.)*

## **Regular**

'Regular' is what you will normally use. When you select it, you will be asked to confirm that this is what you really want to do. This then starts the regular 'ShutDown' sequence. This involves backing up all data on file, deleting old reservations, bringing equipment back on line that is due to come on line, checking for people with late equipment, etc. Tasks will vary depending on what options the System Operator has selected. This whole process takes a few minutes and then the machine is turned off.

*(Note: The same problem with 'Power Off' applies here as with 'Emergency'.)*

## **ShutDown Tasks**

Prior to 'ShutDown' there may be some tasks that you will be required to do. This will depend on the options selected by the System Operator. These can include:

1/ Printing Setup and Pickups for the following day.

2/ Printing Reservation Lists for the following day.

Other tasks may be specified by the System Operator.

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## **Glossary**

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The glossary contains some definitions of the terms used throughout this guide.

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# Terms

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? Res	This is a function that enables you to view reservations for people and equipment. Built into that function is the ability to edit, delete or print any of the reservations.
Agreement Form	This is the printout that is created when you print from the 'Form' card. It is called an 'Agreement Form' because the person who is checking out the equipment must sign it and 'agree' to the terms that are printed on it.
Authorization	When equipment is entered into the system it is either 'Authorized' or 'General'. In the case of 'Authorized', people must have that equipment type assigned to their ID card before they can reserve or check it out. This task is known as 'Authorization'. ( <i>Note:</i> If you try and make a reservation or a checkout for someone who does not have the 'Authorized' item assigned to their card, then you will be informed that the person cannot have access because he/she is not authorized.)
Auto Launch	Is an option the System Operator can set. If set, the application when opened, will automatically go into the 'Launched' mode. It is from this mode that all Reservation and Checkouts can be made.
Auto Res	Is an option that appears on the Reservation card. It is only available to people with the correct authorization. It enables you to reserve the same equipment, for the same times, for up to 16 weeks without re-entering any data.
Blind Typing	This enables you to type any equipment number on the keyboard while you are on the Reservation, Checkout or Agreement Form cards. You will not see what you type, but when you hit the 'Return' key, the system will process what you typed as an equipment number and add it directly to the card.
Checkout	This allows you to create an 'Agreement Form' for a person wanting to take some equipment out.
Command Key	This is the key on the Apple Keyboard denoted with the '⌘' character.
Email	This enables you to send a text message electronically to the person selected. It is an option that needs to be enabled. It also requires a network setup design to handle such traffic.
FKeys	These are a set of keys that are only available on extended keyboards. They range from 'F1' to 'F15' along the top of the keyboard. 'F5' to 'F12' can be mapped onto the on-screen buttons that the system uses. Selecting one of these keys duplicates clicking on the on-screen buttons with the mouse. It can be quicker for some people to do this than move the mouse to the appropriate buttons. The mapping of the keys can be turned on or off by the System Operator. If you see a small 'F#' on each button then you know it is currently turned on.

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Form	This is the button you select to gain access to all the agreement forms currently on file.
General	This is a level of access that can be applied to a person. With this access they can only use equipment that has the same access, and is currently on the list of equipment available to people with this level of access.
Invoice	This is a receipt that can be saved and / or printed from MacCheckout. It will create a listing for the user to enable to see how much they are being charged for the use of the equipment selected.
Launch	This button is used to put the system into the 'Launched' mode. From that mode Reservations and Checkout can be made. It is the normal running mode for the system.
Main Menu	This is the main display card when the system is in the 'Launched' mode. From here you have access to all the functions that are enabled while in this mode.
Notes	These are small text messages that can be attached to items like 'Agreement Forms'.
Option Key	This is the key on the Apple Keyboard beside the 'Command (⌘)' key.
PickUp	Is an option that appears on the Reservation card. It is only available to people with the correct authorization. It enables you to code a regular reservation, so that you know that it is something special, and that it needs to be ready to go at the specified time.
Print	This is consistent throughout the system. To print any data you select the 'Print' button that appears on-screen or in the dialogs.
Resale	This is a module that is supplied to help control the sale of items through the system. You enter the 'Resale' module and from there you can make 'Sales', print reports, etc.
Reservation	This allows you to store requests that people have for certain equipment. A valid reservation will have some equipment and dates and times corresponding to when the equipment is leaving and coming back.
Restricted	This is a level of access that can be applied to a person. With this access they can only use equipment that has the same access, and is currently on the list of equipment available to people with this level of access.
Sale	This is part of the 'Resale' module. When someone wants to purchase an item, you are making a 'Sale'. When the data is entered correctly, you print a 'Sales' receipt, which is an itemized bill containing the final total amount the person will

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	have to pay for the goods requested.
Save	Anywhere in the system that you can enter data, you will be presented with a 'Save' button. Selecting that will 'Save' the data to the hard disk.
Schedule	This is an item that is only available to the System Operator. It allows him/her to set up access schedules for equipment. You will only come across this when it adversely affects you, e.g. You cannot reserve a piece of equipment for a person because it clashes with a 'Schedule'. This can be used with items like classrooms which must be available when classes are taught but can be used by anyone else at other times. The schedule for the class can be entered into the system and that this will block out those times for anyone else.
Select Switch	This is part of the ImageWriter I and II. It is only mentioned because people turn the printer on, but forget to ensure that the 'Select' switch is in the correct position. If it is not set correctly, then the printer cannot print.
SetUp	Is an option that appears on the Reservation card. It is only available to people with the correct authorization. It enables you to code a regular reservation, so that you know that it is something special. It allows you to note that the equipment needs to be set up at a remote location at a particular time, e.g. A lecturer might need a film projector in his/her classroom on a particular afternoon.
Shift Key	This is the key on the Apple Keyboard that allows you to temporarily change lower case letters to UPPERCASE letters.
ShutDown	This is the final function that you will do at the end of a work day. 'Regular' ShutDown automatically does all the house keeping chores that the current settings require, closes all the files related to the system, quits the application, and turns the computer off. ( <i>Note:</i> The last option is not available on all models of Macintosh™ computers.) 'Emergency' ShutDown, which can be used in the event of a fire drill just closes all the files related to the system, quits the application, and turns the computer off.
System Report	This is the report that the system creates as a result of the previous nights ShutDown. It logs any problems it had, as well as other pertinent information. This should be printed out each morning.
System Setup	This is a menu that is only available when the system is 'Unlaunched'. It contains all the commands that the System Operator can use to decide how he/she wants the system to operate. These range from setting the times the system is open for business, the name and phone number of the current location that appears on 'Agreement Forms', and the dates of holidays. There are many other controls and they are collectively known as 'System Setup'.

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## Unlaunch

Normally the system is used in the 'Launched' mode. However, in that mode you do not have access to a lot of the data manipulation tools and the commands to control how the system operates. Selecting 'Unlaunch' from the 'Main Menu' screen will give you access to these items.

*(Note: If the system has an active password, then you will be required to enter it before the system will 'Unlaunch'.)*

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