

Menus

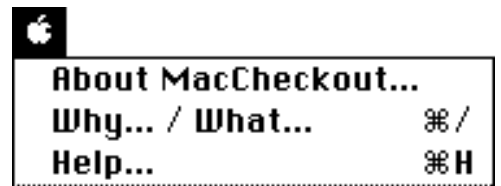
The following is a brief explanation and location of the menu items available to you. Items denoted with '*' are also available to you after the system is launched. A detailed explanation of each menu item is covered in later chapters.

(Note: The 'Email' menu has been kept separate in this revision of the documentation. All data is under the 'Email' chapter.)

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'Apple' Menu or '⌘' menu

The 'Apple' Menu '⌘' is used to support the standard add on utilities present in your system. These would be Desk Accessories in pre System 7 and Extensions in System 7+. The application has three (3) items that it supports for itself:



About MacCheckout...

This gives you a dialog box stating who owns the software, the serial number, version and information about who created the software.

Why... /What...

This is part of the help system. If the system beeps for some reason but DOES NOT present a dialog box then it means there is a reason for the system not to proceed but it is not an important one. Selecting 'Why... /What..' will tell you what the reason is.

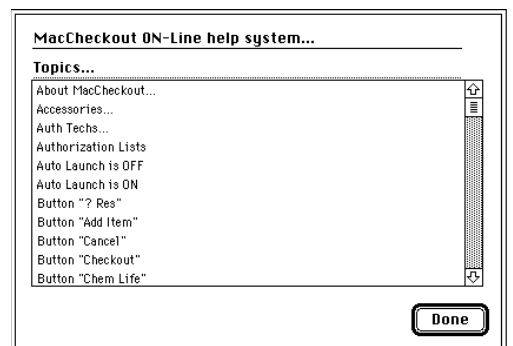
An example of this is:

if you try to delete a list of equipment in 'Reservation' when there is NO equipment data on the list, the system generates a beep. Using 'Why... /What..', will bring up a dialog that will state that there is nothing to delete.

Selecting this at anytime other than a beep, will give you an arrow cursor with a '?' mark attached to it. This allows you to select an item on the menu bar or click on part of the screen to get some 'Help' information about it.

Help...

This gives you access to the applications 'Help' system. You are presented with the 'Help' dialog and a list of subjects from which to choose from. Double clicking on an item will display the 'Help' for that item. 'Go Back' will then return you to the main 'Help' list.



(*Note:* The 'Apple' Menu '⌘' changes to '⌘' if you 'Launch' the system with the option to disable the 'Apple' Menu '⌘' selected. With this menu you only get the three items supported by the application. All Desk Accessories or Extensions are hidden. 'Preferences...' describes how to disable the menu.)



(*Note:* The Apple System Software method of forcing an application to quit is still available. Refer to you Macintosh Users Guide for further information.)

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File Menu

The 'File' menu supports all the importing or exporting of data in the system and most of the global settings regarding its operation.

New...

This initiates a sequence of dialogs to allow you to add a new person or piece of equipment to the system. It is similar to 'People Add...' or 'Equipment Add...' except that it will accept either type of ID number.

Back Up Data...

This will be enabled in the menu bar only if there is at least one backup drive selected for use by the system.
(*Note:* Backup drives can be set using 'Operating Information...' under the 'System Setup' menu.)

Fine Transfer...

This has two functions. It can be used to create a 'Fine Transfer File' which will be called 'MacCheckout.Fines' but will have the current two letter location code as a prefix, e.g. 'MC MacCheckout.Fines'. It can also be used to initiate a 'Fine Transfer'.
(*Note:* This menu item will be disabled, if the 'Disable Fine Transfer' option is selected in 'System Flags...' under the 'System Setup' menu.)

Import People...

This presents you with a standard 'Open file' dialog. From there you can select any text file that is on the hard disk and the system will try and import the data into the 'Import' page. Only files that match the correct format will be accepted. From the 'Import' page the data can be verified as being in the correct format for the system and then added to the data already on file.
(*Note:* The file must have ten (10) comma or tab separated records per line to be in the correct format.)

Merge...

This presents you with a standard 'Open file' dialog. From there you can select any 'Merge' file that is on the hard disk. The system will add to the database any data that is in the file and is missing from the data currently on line.

Export Equipment...

This presents you with a dialog where the export options for the equipment data on file can be selected. The data is then exported to a text file for use in any other application.



Export People...	This presents you with a dialog where the export options for the people data on file can be selected. The data is then exported to a text file for use in any other application.
Export Info for Barcode...	This presents you with a dialog where the options for people or equipment barcode labels can be set. The data can then exported to a text file for use in a barcode printing program, or printed directly using any barcode font currently installed in the operating system. (<i>Note:</i> If you set the barcode font to be something other than the default, then you must also set the start and stop character for that barcode font.)
Export Merge File...	This presents you with a dialog where you can choose what type of 'Merge' file to create. The data is then exported in the 'Merge' file format to the hard disk. (<i>Note:</i> A 'Merge' file contains all the site independent data for the type selected, e.g. Data like reservations is ignored. Only People and Equipment data is supported.)
Verify...	This presents you with a dialog where you can choose what type of data file to verify. It then proceeds to 'Verify' that the system data currently stored on disk is correct and in the right format. This can be used in the event of a file I/O problem, if one ever occurs. (<i>Note:</i> Selecting 'Verify' while holding the 'Option' key down will do a comparison of the reservation data on file for people and equipment and present a list of discrepancies, if any, for you to view or print.) (<i>Note:</i> Both will list any problems it may find but neither will automatically fix a problem due to the fact that it may have to delete some data to do so.)
Preferences...	This presents you with a dialog where the global preferences can be set.
Color Controls...	This presents you with a dialog where the colors of the standard screen buttons used in the system can be set.
Optional Print Items...	This presents you with a dialog where the user can set up some special printing options.
Page Setup...	This presents you with the standard 'Page Setup' dialog.
Quit	This allows you to 'Quit' the application.

Edit Menu

The 'Edit' menu is supported but is only used for cutting or pasting in dialogs. There is no direct user access to the data in the system, so these functions are not required.

(*Note:* Menu items are only enabled when a dialog is displayed that requires data to be entered directly, e.g. the dialog presented when you are requested for a persons ID number.)

Edit	
Undo	*Z

Cut	*H
Copy	*C
Paste	*V

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System Setup Menu

The 'System Setup' menu is the most complicated menu in the system and controls ALL the global data that the system needs to operate. This is just a general overview of these functions, all of which will be described in detail later.

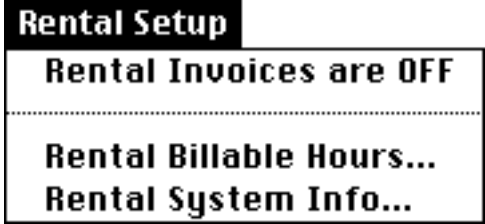
- Auto Launch...** This turns Auto Launching ON or OFF. (*Note:* The illustration has the 'OFF' scenario in place.)
- System Password...** This allows the System Password to be set. (*Note:* If a password is in place then it must be entered before a new one can be set. If any function requires 'Password' access and there is no Password in place, then it is treated as 'Open' access.)
- Function Access...** This command is used to control the level of access you must have for each function when the system is 'Launched'.
- Equipment Codes...** This command is used to control what letter codes are active and what level of access people can have to each one. (*Note:* Only active letter codes can be used as part of equipment ID numbers.)
- Site Information...** This presents you with a dialog where information relevant to operating the system can be set, e.g. The name, address and phone number of the systems location.
- Operating Times...** This presents you with a dialog where the system operating time limits can be set.
- Operating Information...** This presents you with a dialog where more specific information relevant to the operation of the system can be set, e.g. 'Back Up Disk drives'.
- Operating Flags...** This presents you with a dialog where certain system functions, e.g. 'Fine Transfer', can be turned on or off.
- Rental Setup** See the next section.



Equip Outside Sys Op Times...	This presents you with a dialog where a list of equipment can be created. This equipment will then be exempt from the opening and closing times built into the system.
General...	This presents you with a dialog that allows the user to assign what equipment can be accessible to people with 'General' access.
Restrictions...	This presents you with a dialog where the System restrictions can be turned on or off. It also allows you to assign what equipment can be accessible to people with 'Restricted' access.
Special...	This presents you with a dialog where 'Special' can be turned on or off. It also allows you to assign what equipment and locations will be accessible from the 'Special' menu.
Setup / Pickup...	This presents you with a dialog where you can set the 'Setup' and 'Pickup' data for the system.
Holidays...	This presents you with a dialog where you can build a list of dates when the system is closed, e.g. 'Holidays'.
Name Extensions...	The system uses a set format to denote a persons ID. In the event you need to create 'special' ID numbers, then 'Name extensions...' can used to create a list of special three letter codes. These codes can then be used as part of people ID numbers.
Access Initials	See the section after next.
Access Pin Numbers...	This presents you with a dialog where you can build a list of the people working on the system and assign them an access pin number and an access level.
Cables... Accessories...	Each presents you with a dialog that allows you to build a global list denoting items of that type available for Checkout.

Rental Setup Menu

The 'Rental Setup' menu is used to set the Rental setting for the system.



Rental Invoices are...

'Rental Invoices are...'
is a toggle. It allows you to turn the rental functions on or off.

Rental Billable Hours...

'Rental Billable Hours...'
allows you to set the hours that count towards the final invoice costs for equipment.

Rental System Info...

'Rental System Info...'
allows you to set up basic items so that the rental system corresponds to your needs.

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Access Initials Menu

The 'Access Initials' menu is used to set up workers access levels to the system.

Access Initials

Checkout Workers (Level 1)

Auth Techs (Level 2)

Computer Access (Level 3)

Checkout Workers (Level 1) 'Checkout Workers (Level 1)' is used to setup those people who require level 1 access to the system. This is the most basic access.

Auth Techs (Level 2) 'Auth Techs (Level 2)' is used to setup those people who require level 2 access to the system. This level allows you to edit basic data and to access certain functions assigned in 'Function Access'.

Computer Access (Level 3) 'Computer Access (Level 3)' is used to setup those people who require level 3 access to the system. This is the highest level of access and allows the user to edit all data in the 'Launched Mode', other than those assigned 'Password' access and to access certain functions assigned in 'Function Access'.

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People Menu

The 'People' menu is used to control the adding, editing and deleting of people records. It also controls access to Fine data.

People

People Add...
People Edit...
People Delete...

Fine Report...
Fine Add...
Fine Delete/View...

People Restrictions...
People Status Labels...

Departments...

People Add...

This activates a sequence of dialogs to allow you to add a new person to the database. Data is verified at each step to ensure it is in the correct format.

(*Note:* Using 'Cancel' at any time will give you the option to abort adding the item. You can just select 'OK' in a dialog where you do not want to enter any data. However, some items must have data entered, e.g. 'ID number' or 'Last Name'.)

People Edit...

This allows you to edit a data record currently on file for a person.

People Delete...

This permanently deletes a person from the database.

Fine Report...

This prints a complete 'Fine Report' listing all fines currently on file in the system. Fines that have become holds are flagged by having ' (H)' placed beside the fine amount.

Fine Add...

This enables you to apply a fine to a person.

(*Note:* The system takes care of creating fines for all equipment that is returned late. This can be used to create fines in the event someone damages or abuses equipment.)

Fine Delete/View...

This enables you to 'View', 'Print' or 'Delete' a fine card.

People Restrictions...

This allows you to set the system restrictions for any group of people, if the system restrictions are active.

(*Note:* In the event that system restrictions are disabled, then this menu item will also be disabled. You can use 'Restrictions...' under the 'System Setup' menu to enable or disable restrictions.)

People Status Labels...

This allows you to create new types of people. The system defaults to 'Student', 'Faculty' or 'Employee'.

Departments...

This allows you to create a list of departments at your location. These then can be assigned to students joining the database.

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Equipment Menu

The 'Equipment' menu is used to control the adding, editing and deleting of equipment records. It also allows you to access the global data for each equipment type.

Equipment

Equipment Add...
Equipment Edit...
Equipment Delete...

Type Edit...

Equipment Accessories...
Equipment Misc. ...

Equipment Add...

This activates a sequence of dialogs to allow you to add a new piece of equipment to the database. Data is verified at each step to ensure it is in the correct format.

(*Note:* Using 'Cancel' at any time will give you the option to abort adding the item. You can just select 'OK' in a dialog where you do not want to enter any data. However, some items must have data entered, e.g. 'Location'.)

Equipment Edit...

This allows you to edit an equipment record currently in the database.

Equipment Delete...

This permanently deletes an equipment record from the database.

(*Note:* You cannot delete an item that is 'Checked Out'. An item with 'Reservations' must have them removed before it can be deleted.)

Type Edit...

This function is used to manipulate the global data for a type of equipment. It also allows you to reassign specific equipment items to different types of equipment.

Equipment Accessories...

This allows you to build a global list of Accessories used with equipment. Those would include items like lens caps, cases etc.

(*Note:* If you want to assign an item or number to an accessory then there is a special code to add the item. Entering it with '^' at the end, e.g. 'Lens (^)', will allow you to assign a number when it is selected and added to a piece of equipment, e.g. 'Lens (2356)'. This allows you to add 'Lens (^)' only once to the accessory list but assign different serial numbers or 'number of' on an 'as needed' basis when it is selected each time.)

Equipment Misc. ...

This allows you to build a global list of Miscellaneous items used with equipment. This can be used to denote certain specific data that relates to a piece of equipment. This could include the type of fuse or bulb an item uses in the event that it ever needs replaced.

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Email Menu

The 'Email' menu is used to control the system access to the email functions in MacCheckout. It also allows you to send out bulk emails to everyone in the system. This facility can be fine tuned to a specific group or even a single person depending on your needs.

Email

System Email Settings...
Auto Email Sending Times...
Check For Duplicate Names...

Send Out Fine Email List...
Send Out Hold Email List...
Send Out System Time Info...

Send Out General Message...

System Email Settings...

'System Email Settings...' is the main control for accessing how emails will work in MacCheckout. This is from the most basic, where you turn the ability to email ON or OFF, to specifying your SMPT server to allow email communications to function correctly. You can also assign a general email signature and configure some controls to allow you to auto-create email addresses for people in the system.

Auto Email Sending Times...

'Auto Email Sending Times...' allows you to configure MacCheckout to automatically send out emails during 'ShutDown'. These emails can include those who currently have 'Fines' and / or 'Holds'.

Check For Duplicate Names...

'Check For Duplicate Names...' allows you to search the database for people with duplicate names. (*Note:* This is of use, if you decide to use the functions to allow you to automatically create email addresses for people. With these functions, if you have two people with the same name, then they will end up with the same email address.) You can then edit the record individually for these people and give them unique email addresses.

Send Out Fine Email List...

'Send Out Fine Email List...' allows you to send out an email to everyone who has a 'Fine' on file. This will include the amount due.

Send Out Hold Email List...

'Send Out Hold Email List...' allows you to send out an email to everyone who has a 'Fine' which has become a 'Hold' on file. This will include the amount due.

Send Out System Time Info...

'Send Out System Time Info...' allows you to send out the current opening and closing times for MacCheckout. Holidays and 'End Of Active Period' are also included. This email can be sent to everyone or fine tuned for a specific group or individual person.

Send Out General Message...

'Send Out General Message...' allows you to send out a general text email message. This email can be sent to everyone or fine tuned for a specific group or individual person.

(*Note:* A person must have a valid email address to be sent an email.)

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Functions Menu

The 'Functions' menu controls miscellaneous functions that are used both while the system is 'launched' and 'unlaunched'. (*Note:* Items denoted with '*' are available when the system is 'launched'.)

- * **ShutDown...** This will 'ShutDown' the computer. It is used instead of 'Quit' when the system is 'launched'. When the system is 'ShutDown' it uses some time to take care of some internal data management, e.g. deleting out of date reservations, before it turns the computer off. (*Note:* The computer is only turned off if it is a model that supports that feature in software.)

- Cleanup Utilities...** See next section.

- * **Mass Authorization...** This enables you to create 'groups' of people, e.g. 'Class Lists'. These lists can be used to batch authorize people for equipment.

- * **Authorization Lists...** This lists or prints the people who are authorized for a selected type of equipment.

- * **Off Line (Repair Tag)...** This automatically takes a piece of equipment off line for a number of days, (the default is 2). It also prints any reservations that are deleted due to this. The print-out allows you to reserve new equipment for the affected people.

- * **On Line...** This automatically brings a piece of equipment on line.

- * **Resale** This accesses the 'resale' functions built into the system. From here you can create a sales receipt for any item(s) a person wants to purchase.

- Override Info...** This displays what 'Override' or 'Special' access information is currently on file in the system. This includes what time the access took place, what was attempted and by whom.

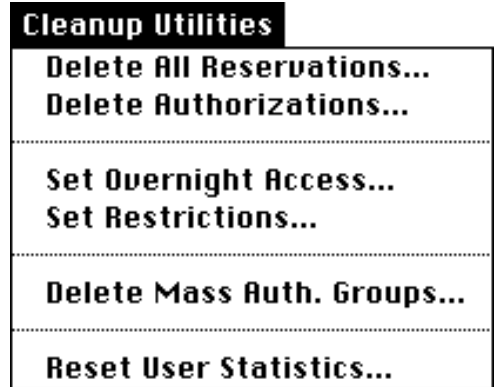
- Check Lists...** This allows you to create Equipment check lists for a mini-inventory based on equipment types, groups, or the whole database.

Functions	
ShutDown...	
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Cleanup Utilities	▶
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Mass Authorization	⌘M
Authorization Lists	⌘B
Off Line (Repair Tag)...	⌘T
On Line...	⌘I
Resale	⌘R
Scheduler	⌘D
<hr/>	
Override Info...	⌘1
Check Lists...	⌘2
Inventory...	⌘3
Statistics...	⌘4
Authorization Stats...	⌘5
System Report...	⌘6
Usage Charts	⌘7
Rental Invoices...	⌘8
<hr/>	
Reservation Lists	⌘L
Print Setup / Pickup...	⌘U

Inventory..	This allows you to print out an inventory of the system based on equipment types, groups, or the whole database.
Statistics...	This allows you to print out a complete statistics report from the system based on equipment types, groups, or the whole database.
Authorization Stats...	This allows you to print a report representing the number of people being authorized for equipment in the system. It can be based on all the authorizations in the database or narrowed to a specific equipment type and month period.
* System Report...	This allows you to view a copy of the current 'System Startup' report. The dialog box also gives you the option to print the report.
* Usage Charts...	This command gives you access to the 'Usage' functions built into the system. The system is able to track the use of two chemicals 'C-41' and 'E-6' which are used in film processing. The development time for these items changes as the amount of film developed increases. These functions can be used to return the current development time, usage data or reset the data for a new mix.
Rental Invoices...	This allows you to view or print the invoices currently on file.
* Reservation Lists...	The reservations currently on file for equipment ID numbers can be printed out with this function. The data printed can be based on equipment types or lists that you created. This can be used in situations where daily sign-up sheets are required. These can be printed out the night before with the data for the date requested already in place.
* Print Setup / Pickup...	This displays a list of all the 'Setup' and 'Pickup' data on file for the requested date selected. It automatically gives you today and the next open date, as the dates to choose from. If you hold the 'Option' key down while selecting this you can enter any date. The dialog box also gives you the option to print the data.

Cleanup Utilities Menu

The 'Cleanup Utilities' Menu is a sub-menu of the 'Functions' menu. It contains utility functions that are used to flush the system of data at the 'end of current active period', e.g. 'End of a Semester'. These functions when used in conjunction with each other, can create a completely blank system.



Delete All Reservations...

This deletes all reservations currently in the system.

Delete Authorizations...

This deletes equipment authorizations for people. It can be used to delete all authorizations, expired authorizations or authorizations for specific equipment code letters.

Set Overnight Access...

This removes the 'Overnight Access' authorization from every person in the database.

Set Restrictions...

This resets the 'Restriction' of all the people in the database to the current setting of the system. That can either be 'Restricted', if restrictions are ON, or 'Open', if restrictions are OFF.

Delete Mass Auth. Groups...

This deletes all the group lists in the 'Mass Authorization' listings. You are given the option to retain the lists pertaining to group 'Leaders' and 'Assistants'. (*Note:* It does not revoke the authorizations for people on the lists. You have to use '**Delete Authorizations...**' in conjunction with this to totally delete all the data related to a group.)

Reset User Statistics...

This resets all the user statistics for the equipment on file, for the current active period. These numbers are added to the total usage for each piece of equipment before they are zeroed out. The total usage is the number of people who have used the item since it was purchased.

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