

System Set Up

The most complicated part of the system is setting it up. Time should be taken to plan how the system is going to be used before proceeding. This saves time down the road if changes have to be made. Changes which get harder the more you use the system. This is due to the fact that equipment once it has been checked out or reserved, cannot be easily altered without affecting a lot of people.

(Note: Items on lists can be deleted by holding the 'Option' key while selecting them.)

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System Restrictions

The system can have two global modes of operation, either 'Open' or 'Restricted'. The differences between these two modes are both simple and complicated depending on how you plan to use the system. It is also the first decision that should be made when setting up the system.

Scenario: You have 200 people in your database and 100 pieces of equipment.

Open

An 'Open' system allows all 200 people to have access to all the equipment. Whether they can reserve or check out the equipment will depend on its status. The equipment that is for 'General' use will be allowed to go out. Only people who are Authorized for Authorized equipment items will be allowed to access those items.

Restricted

A 'Restricted' system states that all 200 people are restricted and no one can have any access to the 100 pieces of equipment. Each person's system access is then turned on individually by the system operator when he/she decides that the person can have access to the system. The person then still has to be authorized for any Authorized equipment he/she may require to use.

When the system is initialized for the first time or at the end of each active period, the system access for everyone has to be reset to what the system defaults are.

'Restrictions' are OFF by default and can be turned on by using the 'Restrictions' menu item on the 'System Setup' menu. That brings up this dialog and checking the box (top/right) turns restrictions ON.

(*Note:* People who are completely restricted in the system can be granted access to some equipment. This equipment can be added via the 'Add' button and appears in the scrolling list. These will be the only items a person with 'Restricted' access can have access to.)

Restrictions can be turned on and off. However doing this can confuse the people using the system. The command to reset user access could also be used when the system is in the incorrect state, i.e. OFF.



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General Setup

After the decision is made on system restrictions then the system operator can start to setup the system as a whole. This includes how the software and system will work.

Preferences:

'Preferences...' is located under the 'File' menu.

Confirm Screen Button Actions

When the system is 'unlaunched' each button on the screen asks you to confirm each action that you take, e.g. "Do you want to Save this?", this is useful when training people but can get in the way when you are fluent with the system. So this option is put in so that you can turn on or off these confirmation dialogs. (As illustrated here.)

(*Note:* The default setting is ON.)

Use Color Interface

This displays a color interface. It only works, even if this is selected, if the monitor is set to 8 bit+ (256 colors or more). Anything less and the system reverts to a black and white interface.

Use TAB delimiter during export




This allows you to switch the character used to denote individual records while exporting data from the system from a 'Comma' (default) to a 'Tab'.

Enable Function Keys

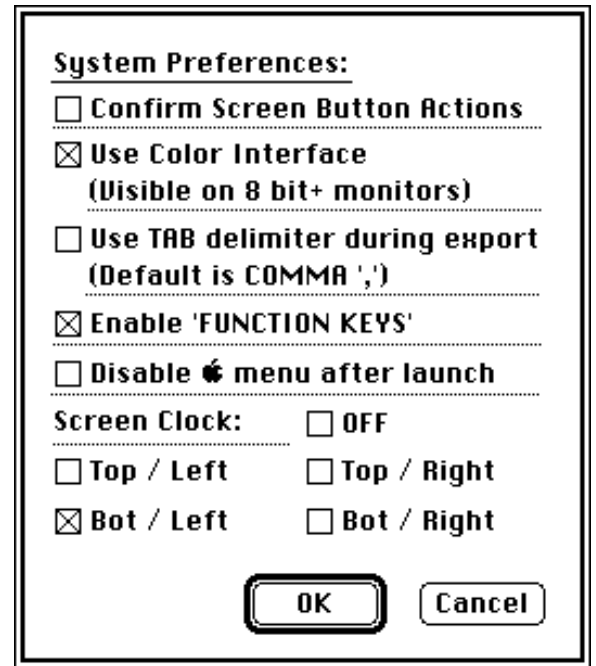
This maps the eight (8) major buttons on the screen with the function keys 'F-5' to 'F-12' reading from left to right. It was added as a fast method of selecting a function so that you do not always need to move the mouse to the bottom of the screen. 'F-13' is a special key. Selecting it brings up a dialog where you can enter a persons ID number or equipment ID number. Depending on which type of ID is entered, the system looks up that record and returns data relevant to it.

(*Note:* With this enabled, the system assumes the right to use these keys, if you have any other applications or software assigned to the keys, possible software conflicts may occur.)

Disable menu after launch

This disables the  ' menu and prevents the user from getting out of the program via the Finder or accessing System Accessories or Extensions. The only items supported are the systems 'About box' and 'Help' features. The  is replaced by .

(*Note:* This is only effective if you run the system on a 640 x 480 pixel display.



On larger screens the user can click directly on the desktop and switch out of the application that way. The Apple System method of quitting applications can also be used to exit the application.)

Screen Clock

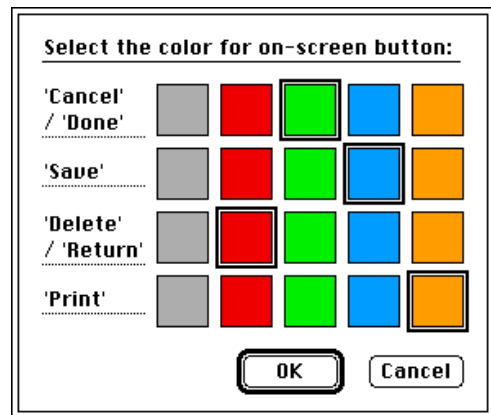
Turns on a real-time screen clock displaying hrs:mins:secs at the set location.

Color Controls:

'Color Controls...' is located under the *'File'* menu.

This allows you to customize the colors of the six (6) on-screen buttons that are consistent throughout the system. For ease of use 'Cancel' is colored the same as 'Done' and 'Delete' is colored the same as 'Return'. The first two denote items that you are finished with and the second two, remove data from the system.

(*Note:* This can be changed at any time but to avoid confusing the user, they should be set once and left alone.)

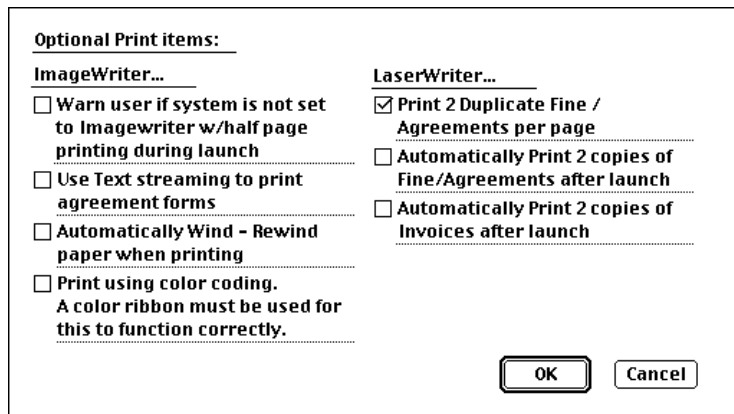


Gray Red Green Blue Orange

Optional Print Items:

'Optional Print Items...' is located under the *'File'* menu.

Due to the fact that the system prints via the on-screen Print button this extra dialog has been added to facilitate printing. The current use of the system has it printing to impact printers using triple sheet NCR paper. This gives the user three (3) copies of any Agree-



ment Form or Fine Card. With Agreement Forms, one is kept, one is given to the person making the request and the third is used as an equipment pass to leave the building, if needed. With Fines, one stays with the system, one goes with the person making the request and the third is used to pay the fine.

In the event of the system being attached to a LaserWriter, then the three options on the right can be used to duplicate copies of each form. (See Dialog)

Print 2 Duplicate... This allows you to print two copies of the same form on the same page.

Automatically Print 2... This allows you to print two pages containing the same data.
(*Note:* If the 'duplicate' option is used in conjunction with the 'print 2' option then the user ends up with four (4) copies of each Agreement or Fine form, duplicating the triplicate data the user would get with a impact printer and NCR paper.)

The next four items relate to printing with the ImageWriter.

Warn user... This gives the user a warning dialog after the system launches informing him/her that the ImageWriter is not currently selected in the Chooser or that the printer is not currently set to use half page paper. Both the Agreement and Fine forms will fit on a half page form and current system operators have it printing to half page triplicate forms. There is an added option in the 'Page Setup' dialog for the ImageWriter that allows you to select a half page form. This dialog means that this option is not currently selected. The system will continue to operate but it will print to full page paper on whatever printer is selected.

Use Text streaming to... This was added to speed up printing to an ImageWriter. With this option selected the Agreement Form data is dumped as a text stream to the printer. No formatting of the data is attempted but if a color ribbon is used, it switches colors to denote different data and its importance. What it lacks in layout it gains in speed. If you do not select this option, printing to the ImageWriter and the LaserWriter will give you the same results.

Automatically Wind - Rewind... This was added to automatically take care of winding the paper to the correct spot before printing. The software rewinds the paper back the equivalent of six (6) lines of text, prints the data and then moves the paper forward again. This method of working uses low level printer calls sent directly to the printer, but as stated in Apple's technical notes these calls are being phased out. So the option to turn this on or off is supplied in the event of future incompatibilities with Apple's operating software or Print Manager.
(*Note:* If you do not use this option, you will have to manually align the paper in the printer to get the half page forms to fit correctly.)

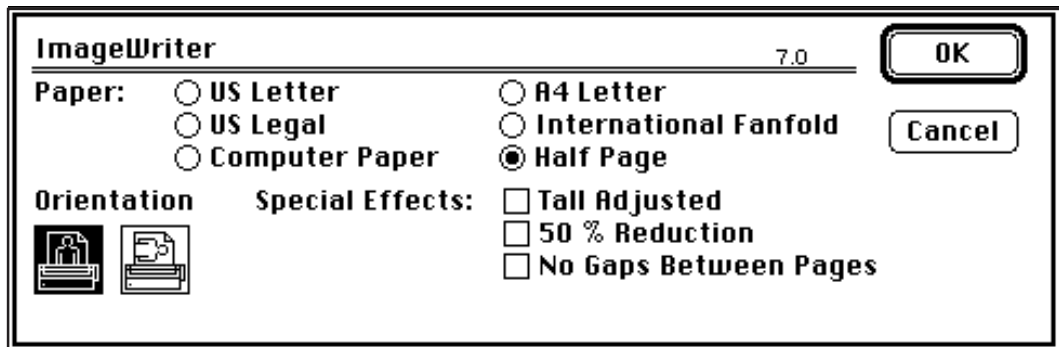
Print Using Color coding... This allows you to use a color ribbon in an ImageWriter II to print Agreement Forms. With this option turned on, certain areas of a 'Text streamed' Agreement Form will appear in different colors. It enables the user to read the data easier.
(*Note:* If you turn this on, but print to an old ImageWriter I, you will get control characters printed with the form. This is because the older printer thinks the control characters are part of the text. It cannot use them to change ribbon colors.)

Page Setup:

'Page Setup...' is located under the *'File'* menu.

The 'Page Setup' option for the LaserWriter is the standard dialog. However there is one addition to the dialog for the ImageWriter and can be seen selected here. That option is 'Half Page'. This will force the ImageWriter to print to half page paper. Both 'Agreement' and 'Fine Forms' have been designed to print on half page paper.

(*Note:* To get the data to fit correctly on a half page piece of paper however the paper is going to have to be aligned correctly in the printer. This can be done by manually rewinding the paper or using the 'Automatic Wind - Rewind...' option in the 'Optional Print Items' dialog. 'Optional Print Items' is located under the 'File' menu.)



System Setup

The 'System Setup' menu contains all the items that the system uses to operate. All have a default setting and can be left as is, or fine tuned depending on the system operators needs.

Auto Launch is... This menu item is a toggle switch that can be turned on or off. When the application is opened two things can happen. If 'Auto Launch' is 'OFF' then the system operator will be left at the basic system screen. From here the system operator can manipulate any data in the system or launch the system. There is NO protection for the system. If 'Auto Launch' is 'ON' then a 10 second timer is presented. The system operator can abort the launch if he/she enters the current system password. If left, the system will launch and present the system operator with a dialog to decide if he/she wants to print the System startup report. From here the system operator has complete access to all the Reservation or Checkout functions. The password is needed to exit this area.

System Password... This allows you to set the system password. The password is case sensitive so you will be asked to enter it twice to verify that you have typed the correct data. (*Note:* If you select OK twice without any data being in the dialog you are telling the system that you want no password. If you do this then anytime you would be requested a password, it acts like you have entered the password correctly, e.g. The launch timer would automatically abort. This however allows anyone to 'launch' and 'unlaunch' the System. If a password is installed then you will have to enter it correctly before you will be allowed to enter a new one.)

Function Access... This allows you to set the access level for certain system functions after the system is 'launched'. When the system is 'unlaunched' it is assumed that you know what you are doing and it does not verify your access.

There are five (5) levels of access ranging from 'Open' which means no restrictions to 'Password' which is the highest level. Levels 1 - 3 are also illustrated here. To have access to that level, your initials, 3 letter code or pin number must be on file in the appropriate access list. These lists are available under the 'Checkout Worker...', 'Auth Techs...', 'Computer Access...' options of the 'Access Initials' sub-menu in the 'System Setup' menu or under 'Access Pin Numbers..' in the same menu. You have access to the level you are on plus any level lower than you. Each item is set by selecting the appropriate access box and selecting the access

Access Setup:	
Functions:	Access:
Edit People Data	Computer Access (Level 3)
Edit People Limitations	Auth Techs (Level 2)
Authorize People	Auth Techs (Level 2)
Mass Authorization	Auth Techs (Level 2)
Fine Add	Computer Access (Level 3)
Fine Delete	Computer Access (Level 3)
Resale 'Load'	Computer Access (Level 3)
On Line	Open (No Restriction)
Off Line (Repair Tag)	Checkout Workers (Level 1)
Extending Off line	Auth Techs (Level 2)
Changing Equipment Location	Computer Access (Level 3)
Equipment Edit	Computer Access (Level 3)

Note: There is no restriction on any data that cannot be edited or deleted, i.e. Equipment Statistics.

OK Cancel

level from the pop-up menu presented.

(*Note:* When you are asked for the Password, you must enter the Password, however when you are asked for initials you must enter valid initials, the Password will not be accepted. If you set the access to be Password and no system password is set then it acts the same as 'Open' access.)

Equipment Codes... All equipment 'numbers' in the system must begin with a letter. You can control if a letter is active or not by using equipment codes. A letter is activated using 'Access'. If a letter has 'None' for access then the system will not let that letter be used for an equipment number. There are three other choices, 'Open', 'Restricted', and 'Computer'. 'Open' and 'Restricted' denote equip-

Equipment Codes:					
Letter Name:	Access:	MA:	Letter Name:	Access:	MA:
A	None	N	N		None
B	None	N	O		None
C	None	N	P	PHOTO	Open
D	None	N	Q		None
E	None	N	R		None
F	None	N	S		None
G	None	N	T		None
H	None	N	U		None
I	None	N	U		None
J	None	N	H		None
K	None	N	Y		None
L	None	N	W		None
M	None	N	Z		None

Access: 'None' = not Used, 'Open' = open to all, 'Restricted' = limited access, 'Computer' = database purposes only.
 MA: Decides whether the item will be usable in 'Mass Authorization', 'N' for No, 'Y' or Yes.

ment that people can have access to, 'Computer' is used to denote items that are being added for database purposes only and are not accessible by users. 'MA' is used to denote if you can make a group in 'Mass Authorization' of this type. 'Y' means you can, 'N' you cannot.

The difference between 'Open' and 'Restricted' is subtle but important.

Scenario:

Code the letter 'A' as 'Open'
 Equipment type of 'Monitor' that is 'General' not 'Authorized'.
 Two items: A-1-AA, A-2-AA

Code the letter 'B' as 'Restricted'
 Equipment type of 'Camera' that is 'General' not 'Authorized'.
 Two items: B-1-BB, B-2-BB

When a user comes to reserve these items the system allows the person to access the 'Monitor' type. However it notes that 'Camera' is restricted and it then checks the 'Mass Authorization' groups for a group of type 'B'. If it finds it, it then checks to see if the person is on that list. If the person is then he/she can have access to that type of equipment. If he/she is not, or a group of this type does not exist then access is denied.

In both cases, if the equipment is 'Authorized' then the person must be authorized for the item before he/she can have access to it.

(*Note:* Once these items are enabled and equipment or groups exist for a specific code, they cannot be disabled until the equipment or groups have been removed from the system.)

Site Information...

This allows you to enter data specific to the site. This data is used to denote equipment coming from different sites, if more than one location is active. An organization name and Initials, a valid location, building name, address, phone number and account number can be entered.

All name and address data appear on the Agreement and Fine forms.

The 'Acct #' is used to denote which account number, if any, a fine amount is to be paid into.

Site Information:	
Organization Name	Photo Dept.
Organization Initials	S.A.I.C.
Location	PH
Building Name	Columbus
Address	280 S. Columbus Dr.
Phone #	312/443-3751
Acct #	0-000-00000-00000

Location

The most complex item on here is the **location**. This is used to denote what items the system will allow the user to have access to when making Reservation and Checkout requests. When a piece of equipment is entered into the database it is given a location. This data can be a two letter code or a two letter code located with something, i.e. 'PH' or 'PH W/M-1-TV'. Only items with two letter codes are available for direct Reservation or Checkout. If NO location is supplied then the user is presented with ALL equipment in the system that is currently On Line and has a valid two letter location. If you do use a two letter location then the user is presented with the equipment that matches this location. In this illustration the valid location is 'PH'.

(*Note:* The location can be changed at anytime but any Reservation or Checkout requests in the system will not be changed. Furthermore if you use 'Fine Transfer' to exchange fine data with other systems, then changing this location will adversely affect that process.)

Operating Times...

(*Note:* 'Fine Transfer' is covered in the 'Multiple Locations' chapter.)

This allows you to control when the system is open for business and for how long.

The time can range from 'Closed' (never open) to 'Open' (never closed). Lunch times for each day can be set independently. You must enter an Open time before you can select a Close time and you must enter a close time for lunch before you can select the time you re-open.

The same applies for the evening break time, the close time must be selected before the time that you reopen.

The '**End of Active Period**' is the last date that the system will currently take Reservation or Checkout requests for, e.g. it could denote the end of a semester. (*Note:* The open time is when you are open for business, items can come and go then, but the close time means you are closed, items can come back, but they cannot go out. Same rules apply for lunch. The system also rounds off the real world clock to the nearest half hour for use in the system. The way it rounds the time off is as follows:

0 - 14 mins = 0 mins

15 - 44 mins = 30 mins

45 - 60 mins = 0 mins (hr is increased by one).

Examples of times being rounded:

Real Time: System Time:

6:06 6:00

6:24 6:30

6:38 6:30

6:52 7:00

There is also a 30 min period enforced between reservations. The 30 min period is used to give people extra time to return equipment and techs time to inspect the equipment for damage before it goes out again.)

Operating Times:							
Days:	Open:	Close:	Lunch Time:		Evening Break:		
Monday	9:00 AM	11:30 PM	NOON	1:00 PM	5:00 PM	6:00 PM	
Tuesday	8:30 AM	11:00 PM	12:30 PM	1:30 PM	6:00 PM	7:00 PM	
Wednesday	9:00 AM	11:30 PM	NOON	1:00 PM	5:00 PM	6:00 PM	
Thursday	8:30 AM	11:00 PM	12:30 PM	1:30 PM	6:00 PM	7:00 PM	
Friday	9:00 AM	11:30 PM	NOON	1:00 PM	5:00 PM	6:00 PM	
Saturday	8:30 AM	11:00 PM	12:30 PM	1:30 PM	6:00 PM	7:00 PM	
Sunday	Open	Open	NOON	1:00 PM	4:00 PM	8:00 PM	

End of Active Period

Operating Information:

This allows you set more general information that the system needs to run.

Backup Disk #1 or #2

If you enter the name of a valid hard disk in either **Backup Disk #1 or #2**, then during the nightly 'ShutDown' procedure the system will backup all data to the hard disks. The disks cannot have the same name as the one you are currently using. If two names are supplied the system will alternate nightly, backing up to each drive in turn. This gives you two days of backups to refer to in the event of some disaster affecting your main system.

Operating Information:	
Backup Disk #1 Name	<input type="text"/>
Backup Disk #2 Name	<input type="text"/>
Fine Delay (Mins)	45
Hold Delay (Days)	1
Default Access Time	4 Days
Default Fine Amount	\$5.00
Default Accessory Value	\$10.00
Default Equipment Value	\$50.00
Default Rental Fee	\$10.00,Per Hour
Default Accessory Rental Fee	\$5.00,Per Hour
Minimum Fine Amount	\$5.00
Minimum Rental Amount	\$20.00
# of equipment users to Track	6
<input type="button" value="OK"/> <input type="button" value="Cancel"/>	

Fine Delay (mins)

This is used to denote how many minutes late a piece of equipment can be before the user is assessed a fine. If no number is specified then no fine will ever be imposed. This is different from equipment being late. If a piece of equipment is late then it must be returned in the system. This number only decides if the user will get a fine for it being late or not.

Hold Delay (Days)

This is used to denote how many days a user has to pay a fine before it becomes a hold. In the event of a fine becoming a hold, the user is locked out of the system and can no longer make Reservation or Checkout requests. Similarly, if there is no number present then fines will NEVER become holds.

Default Access Time

This is used to denote the default access time (how long a piece of equipment can be Reserved or Checked out). This is used to set the access time for Cables and Accessories. It is also used as a fall back in the event of a piece of equipment missing that appropriate piece of information.

Default Fine Amount

This is used to denote the default fine value of a piece of equipment. This amount is used when fines are applied to Cables and Accessories. It is also used as a fall back in the event of a piece of equipment missing that appropriate piece of information.

Default Accessory Value

This is used to denote the monetary value that is used as the default value for accessory items. This is used in conjunction with 'Include Equipment Values on Agreement Form' (which is discussed under 'Operating Flags'.). With this flag turned on all values for equipment are printed along with the equipment. These

values are also totalled and that amount is included on the 'Agreement Form' also. This can be used to make the user aware of how valuable the equipment he/she is taking out.

The flag "Add 'Equip Accessories' to 'Checkout / Agreement' " adds the accessories to agreement forms also. So this default value is used when the system finds an accessory on file that does not have a value associated with it.

- Default Equipment Value** This is similar to 'Default Accessory Value'. It is a value that is used when the system is assigning values to equipment on 'Agreement Forms' and finds a piece of equipment on file that does not have a value associated with it.
- Default Rental Fee** The 'Default Rental Fee' is the amount that is assigned to any piece of equipment that does not have a rental value associated when a rental invoice is created and is used when the invoice bill is totalled.
- Default Accessory Rental Fee** The 'Default Accessory Rental Fee' is a value that is assigned to any cables or accessories that are included on a rental form. These items usually have no value associated with them and as a result this is a global setting. The same value is applied to all cables and accessories. As with 'Default Equipment Value', this value is used when an invoice bill is totalled.
- Minimum Fine Amount** The 'Minimum Fine Amount' is a value that is used after a fine is created. When the fine is totalled, it is quite possible that a small monetary value will be involved. There are times when this value is too small to be worth collecting. So this value, if set, will be used in its place as the total for the fine, so that it can be imposed and collected.
- Minimum Rental Amount** The 'Minimum Rental Amount' is a value that is used after a rental invoice is created. When the invoice is totalled, it is quite possible that a small monetary value will be involved. There are times when this value is too small to be worth collecting. So this value, if set, will be used in its place as the total for the invoice, so that it can be billed and collected.
- # of equipment users to Track** '# of equipment users to Track' allows you to change the default value of 6 users. This is the number of users of each piece of equipment that the system stores on file. (**Note:** If you increase this value, you may need to increase the amount of memory assigned to the application. This will depend on the number of user, the number of people and the number of pieces of equipment that you have on file.)

Operating Flags...

These are items that can be turned on or off depending on how the system operator wants to configure the system.

Auto-Return after printing 'Agreement'

This is used to decide if you want to stay at the Agreement Form after you have printed it or not. If this option is selected then you are automatically sent back to the 'Main menu'. Otherwise you are left at the Agreement Form and you have to decide what to do next.

'Its Here!' Auto-Return option in 'Checkout'

If turned on, is an added option that appears in Checkout in the event that a piece of equipment is NOT available for the sole reason that it is checked out. This is to be used in the event that someone has forgotten to return it from a previous Agreement Form and the user can see it is present at the location. If they chose 'Its Here!', the system will automatically return it for you and add it to the current persons list of equipment as being available. Obviously this command is a little dangerous because items could be returned without them actually coming back, so it is suggested that this option should be left off until the people using the system are up to speed with it, and are aware of the problem.

Use 'Descriptors' outside of 'Reservation' / 'Checkout'

'Descriptors' are text labels that can be assigned to individual pieces of equipment. If you create an equipment type called 'Monitors' and you assign several pieces of equipment to it. Then it is possible that you will lump several different monitors together to save space on the menu bar. You can then add a 'descriptor' to each equipment number so that the user knows what each items is, e.g. 'M-1-TV - 9in Portable', 'M-2-TV - 19in Color Monitor'.

When a descriptor is present it is automatically displayed along with the equipment number in 'Reservation' and 'Checkout'. This helps to ensure that the user gets the equipment he/she wants. With this item selected these 'descriptors' are presented anywhere the equipment ID number is shown, this includes 'View'. The option to turn this feature on and off is given because displaying the 'descriptors' can take a little time and may not be needed by all users.

Operating Flags:

Auto-Return after printing 'Agreement Form'

'Its Here!' Auto-Return in 'Checkout' / 'View'

Use 'Descriptors' outside of 'Reservation' / 'Checkout'

Add 'Equip Accessories' to 'Checkout' / 'Agreement'

Include Equipment Values on Agreement Form

Confirm Deleting Reservations in '? Res'

Confirm Deleting Agreement Forms 1 Week early

Show 'Off Line' items in 'View'.

Calculate Fine Amounts using only Full Days

Calculate Rental Fees using only Full Days

Allow 'Agreement Form Notes' to be stored online

System Options:

Disable 'General' in Mass Authorization

Disable 'Mass Authorization' Schedules

Disable 'Overnight' Access

Disable 'Fine Transfer'

Disable 'Auto End of Semester' clean-up

Disable 'Sys Setup' print out in 'Startup Report'

Add 'Equip Accessories' to 'Checkout' / 'Agreement' As equipment gets more complex, more items are added to it. A simple light kit containing three (3) lights can contain up to a dozen other parts. These could include barn doors, stands, scrims etc. The light kit may be listed in the system under one number, e.g. 'M-1-LK'. However, when someone checks it out, they are actually getting a lot of other equipment. If the associated items are listed under accessories then the computer knows what parts are associated with the unit. The user however, does not. With this option turned on, ALL accessories are listed as part of the 'Checkout'. All items are then printed out as part of the 'Agreement Form'. The user then has a reference list to check, to ensure that he/she returns all the parts to the item.

Include Equipment Values on Agreement Form This option adds the monetary value for each piece of equipment to the 'Agreement Form'. It also totals all the values and prints out that amount on the form. This can be used to make the user aware of how valuable the equipment he/she is taking out.

Confirm Deleting Reservations in '? Res' This option is an added security feature. When it is turned on, the user will have to enter his / her initials when they try and delete a reservation for someone in '? Res'. Those initials and the person affected will be noted as part of the 'Override' data.

Confirm Deleting Agreement Forms 1 Week Early This option is an added security feature. When it is turned on, the user will have to confirm that they want to delete an 'Agreement Form', if the equipment on the 'Form' is not due back for at least one (1) week. This helps prevent the wrong 'Agreement Form' from getting deleted by accident. Several sites using the MacCheckout system authorize the use of certain equipment by students for the whole semester. This equipment is then 'Checked' out once at the beginning of the semester and then returned at the end of the semester. This 'Agreement Form' is then stored along with any others for that person. When the person returns any other equipment the user is presented with the oldest 'Agreement Form' on file for that person first. As the semester progresses, the possibility that the oldest one on file is the semester long 'Checkout' increases. If a user selects it to be returned then this feature would ask him/her to confirm that they actually want to return the equipment.

Show 'Off Line' items in 'View' Normally only items that can be 'Reserved' or 'Checked' out can be seen in 'View'. However, if you only have one (1) of a certain type of equipment and it happens to be 'Off line' for repair, then nothing for that type will show up under 'View'. The user will be informed that 'There are no items of that type available.' This can lead to a little confusion since the user may know that there is at least one item usually available. With this option turned on, then the 'Off Line' item will be displayed but it will be labelled as being 'Off Line'.

Calculate Fine Amounts using only Full Days

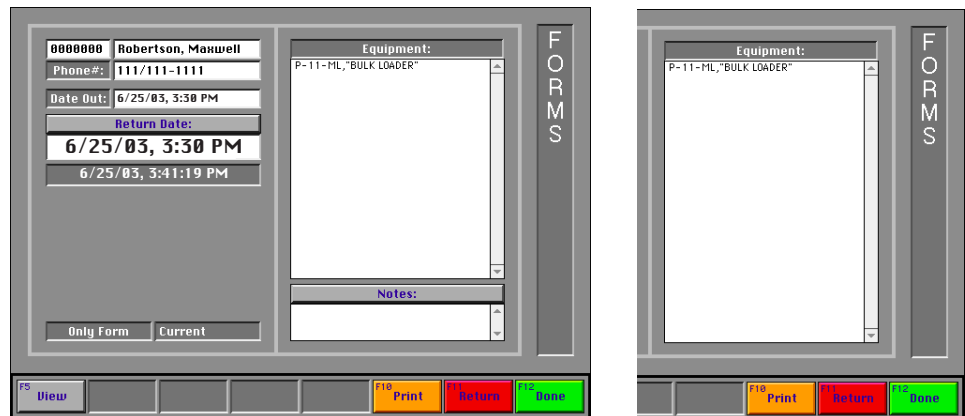
This is used to affect the calculation of how much a person is going to be fined when they return a piece of equipment late. The default for the system is to fine the person based on how late the person is. If the equipment has a \$10.00 fine assigned to it and the person is 8 hrs late then they will be fined based on 8 hrs being 1/3 of 24 hrs. So the fine in this scenario is \$3.33. With this option turned on the fine amount would always multiples of full days. So 8 hrs late would be treated the same as 24 hrs and the fine would be \$10.00.

Calculate Rental Fees using only Full Days

This is used to affect the calculation of how much a person is going to be billed for the equipment they are renting. The default for the system is to invoice the person based on how long the person has the equipment for. If the equipment has a \$10.00 rental fee per day assigned to it and the person has it for 8 hrs then they will be billed based on 8 hrs being 1/3 of 24 hrs. So the invoice in this scenario is \$3.33. With this option turned on the invoice amount would always multiples of full days. So 8 hrs rental would be treated the same as 24 hrs and the invoice would be for \$10.00.

Allow 'Agreement Form Notes' to be stored online

This allows you assign a note to each agreement form. These notes are only stored on-line and are viewable every time the 'Agreement Form' is accessed. They are automatically deleted when the form is deleted.



The image on the left shows this option turned ON, the partial image on the right shows this option turned OFF.

If you click on the button labelled "Notes:", you will be presented with a dialog that allows you to enter or delete the note to be assigned to the form.

Disable 'General' in Mass Authorization This is an option to prevent a group list of type 'General' being created. This group is used to give people 'General' access to the system in the event that 'Restrictions' are turned on. As a result, anyone on this group can have access to any item that has 'General' access, (i.e. not Authorized) and is on the 'General' list under 'General...' in the 'System Setup' menu. People on this group can be authorized for items but their access always remains 'General'.

Disable 'Mass Authorization' schedules Each group that you make in 'Mass Authorization' can have its own schedule. If you want to restrict a particular groups access to a certain time period, you can do that, e.g. Mon 6 - 9. However, you must remember to set a schedule for every group created or else the people on a group without a schedule will have NO access. This option is used to decide if you want to bother with schedules at all. If you do disable that feature then everyone's access time will default to the times that the system is open.

Disable 'Overnight Access' This is used to prevent anyone in the system from being given overnight access.

Disable 'Fine Transfer' This is used to prevent the creation of the 'Fine Transfer' file. This file is used if you want to add fine data from one system to another.

Disable 'Auto End of Active Period' Cleanup This is used to stop the automatic execution of all the 'Cleanup Utility' functions when the 'End of Active Period' date is reached. (If a date is not on file, then automatic cleanup will never happen. (See the 'Cleanup Utilities' Chapter).

Disable 'Sys Setup' printout in 'Startup Report' This is used to stop the printout of the current systems: setup, address, location, etc.

(**Note:** Items on lists can be deleted by holding the 'Option' key while selecting them)

Rental Setup

This is a sub-menu that hold the items required to enabled and configure the rental system that is built into MacCheckout. There are currently three (3) items listed: 'Rental Invoices are...', 'Rental Billable Hours...' and 'Rental System Info'.

Rental Invoices are...

'Rental Invoices are ...' is a toggle. By default it is 'OFF'. If you select it, then it will read 'ON'. In the 'ON' mode, 'Rental Billable Hours' and 'Rental System Info' are selectable. In the 'OFF' mode, both items are disabled. These two options are used to set up how invoices will work, if they are used at all. (**Note:** In the 'OFF' mode, no invoicing functions are available in MacCheckout.)

Rental Billable Hours

'Rental Billable Hours' can be used to control what hours a person will be billed for an invoice.

If nothing (or everything) is selected, then the person will be billed for the duration of the checkout.

The buttons: Mon - Sun allow you to choose the day of the week you want to set the limits for. The time slots then let you turn on or off that particular hour as a billable item. The four buttons '9 AM - Noon', '1 PM - 4 PM', '6 PM - 9 PM' and '9 AM - 4 PM', allow you to turn on or off all the hours between the two times. 'All' and 'None' will turn on or off all the hours for the selected day. 'ALL week' and 'Blank Week' will turn on or off all the hours for the week.

This option allows you to limit your invoice charges to time when the user can actually use the equipment, assuming that it will not be used 24 hrs a day. (**Note:** The settings are something you are going to have to consider carefully before you implement them as they can have a tremendous effect on the final total of an invoice.)

Set the billable hours for rental

Mon Tue Wed Thu Fri Sat Sun

Day: Monday

<input type="checkbox"/> Midnight	<input type="checkbox"/> 6:00 AM	<input type="checkbox"/> Noon	<input type="checkbox"/> 6:00 PM
<input type="checkbox"/> 1:00 AM	<input type="checkbox"/> 7:00 AM	<input type="checkbox"/> 1:00 PM	<input type="checkbox"/> 7:00 PM
<input type="checkbox"/> 2:00 AM	<input type="checkbox"/> 8:00 AM	<input type="checkbox"/> 2:00 PM	<input type="checkbox"/> 8:00 PM
<input type="checkbox"/> 3:00 AM	<input type="checkbox"/> 9:00 AM	<input type="checkbox"/> 3:00 PM	<input type="checkbox"/> 9:00 PM
<input type="checkbox"/> 4:00 AM	<input type="checkbox"/> 10:00 AM	<input type="checkbox"/> 4:00 PM	<input type="checkbox"/> 10:00 PM
<input type="checkbox"/> 5:00 AM	<input type="checkbox"/> 11:00 AM	<input type="checkbox"/> 5:00 PM	<input type="checkbox"/> 11:00 PM

9 AM - Noon 1 PM - 4 PM 6 PM - 9 PM 9 AM - 4 PM

Set hour limit by DAY: ALL None

or by WEEK: ALL Week Blank Week

OK Cancel

(**Note:** Items on lists can be deleted by holding the 'Option' key while selecting them)

Rental System Setup

'Rental System Setup' can be used to control how the invoicing system will be used.

'Use the current system data and acct#' is a toggle that can be 'ON' or 'OFF'. If it is 'OFF', then the data entered in 'Site Information' under the 'System Setup' menu will be used. If it is 'ON', then the eight (8) fields below will be enabled. This allows you to enter more specific information about your setup. This is the information that is printed out in the 'payable to' section of the invoice.

Rental System Setup:	
<input type="checkbox"/>	Use the current system data and acct #
Address and acct # info to be printed on invoices:	
Contact Person	Maxwell Robertson
Organization Name	The Ultimate Media Center
Address	1 Cherry Lane
City	Chicago
State / County	IL
Zip / P.O. Code	60302
Phone #	123-4567
Acct #	123-456-7890
<input checked="" type="checkbox"/>	Use same Tax % as Resale Tax 5.00
Start Invoice Numbers at PH000023HJ	
<input checked="" type="checkbox"/>	Store invoices online
<input type="button" value="OK"/> <input type="button" value="Cancel"/>	

'Use same Tax % as Resale' is a toggle that can be 'ON' or 'OFF'. If it is 'OFF', then a value can be entered in the 'Tax' field. If it is 'ON', then the value used in the 'Resale' module will be used here, assuming one has been set. This 'Tax' value is then added to the subtotal value of the invoice, to produce a grand total.
(**Note:** This is used in the situation where some sort of sales tax is applicable to rented equipment.)

'Start Invoice Numbers at' allows you to set a starting value for your invoices. Three types of values can be used:

- 1/ Just a number, e.g. 111111
- 2/ A number that starts or ends with any combination of letters, e.g. AA111111 or 111111AAA
- 3/ A number that starts and ends with any combinations of letters, e.g. AA111111AAA.

Each time an invoice is issued, the number part of the invoice number has one (1) added to it. This ensures that no duplicate invoice numbers are issued.

'Store invoices on-line' is a toggle that can be 'ON' or 'OFF'.

Important: If this option is 'OFF', then NO invoice is saved on your hard disk. The invoice is generated in real-time and printed out as needed. This invoice can only be generated as long as the 'Agreement Form' for the selected checkout is on file.

(**Note:** Items on lists can be deleted by holding the 'Option' key while selecting them)

If this option is 'ON', then an invoice is saved on your hard disk. A folder called 'MacCheckout->Invoice' is created inside the 'MacCheckout' folder. Then a folder for the current month is created, e.g. 'MacCheckout->JUN03' and then the invoice is saved to that folder. The invoice number is the name of the file that the invoice is saved to. This way all invoices are broken down on a monthly basis, which can be useful if you want to query them at a later date. (**Note:** See the new 'Rental Invoices' option under the 'Function' menu later in this document for an explanation of the query system.) These invoices stay on file, just like the repair and resale data.

The question asked is why is there an 'OFF' option. This has been requested by an institution that does not want an rental system. However they want the students to start dealing with real life scenarios like a budget for projects. This way each time the student checks an item out, they can get an invoice and keep track of how much they are 'spending' on their project. If they go over budget then they are penalized. In this scenario, no actual invoices need to be saved.

Equipment Outside Sys Op Times

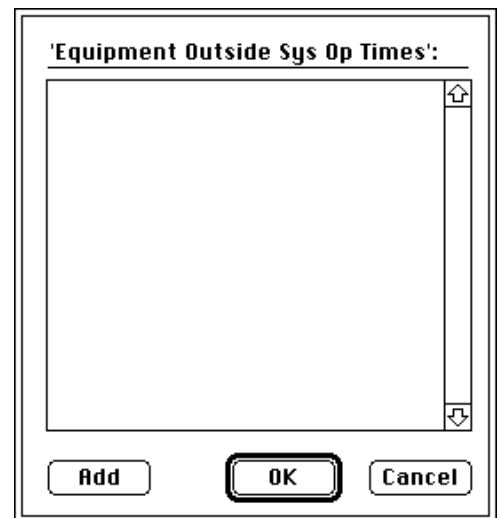
This allows you to build a list of equipment that does NOT obey the system operating times.

When items on this list are selected in 'Reservation' or 'Checkout' the user has the full day to select from as far as times in and out are concerned.

An item can still only be checked out once but gives a more accurate portrayal of the usage time involved.

One negative is that the system does NOT know when the equipment is being returned late, since times when the system is closed can be used as a return time.

As a result, when an item on this list is returned 'late', the system asks the user who is returning the item, if the item is actually late. If it is late then a fine card will be generated following normal guidelines.



(**Note:** Items on lists can be deleted by holding the 'Option' key while selecting them)

General

This allows you to build a list of equipment that is available to people who have 'General' access. 'General' access can be assigned to a user via 'Mass Authorization'. Groups specifically for 'General' access can be created there. Equipment can be added as single types or as whole categories.

'General':

Printing
Lab
Mural
Misc

Add Category Add Type

Equipment Available to People with 'General' access.

OK Cancel

Restrictions

This allows you to decide if you want to use a restricted system or not. (As discussed in 'System Restrictions' earlier) 'Enable' turns the Restrictions on and off. When you set the restrictions you should use the 'Cleanup Utilities' function 'Set Restrictions' to ensure that everyone in the database has their restrictions set to the current system restrictions.

People who have restricted access can be given special access to certain items by adding them to the 'Restricted' access list. This is done by selecting 'add' and choosing the item(s) required. The item(s) will then appear in the scrolling list. Restricted users will then have access to those items.

Example:

You run a restricted facility and it is only open to people accessing that facility,

(**Note:** Items on lists can be deleted by holding the 'Option' key while selecting them)

'Restrictions': Enable:

16MM VIEWER
16MM SPLIT REEL

Add OK Cancel

Equipment Available to People with 'Restricted' access.

hence only those people will have 'Open' access. However you must supply 'Copy Camera' access to whoever wants it. You would add 'Copy Camera' to this list and then that would be the only item available to people with 'Restricted' access.

(**Note:** There is a special group code in 'Mass Authorization', '@Spc'. You can use this to 'Authorize' people with 'Restricted' access, without changing their status, if you need to do so. See the 'Mass Authorization' chapter for more information.)

Special

This allows you to have some control of the locations of items. As discussed earlier in 'Site information', if the system has an active two letter location then only items at that location are available for 'Reservation' or 'Checkout'. This, if enabled, allows you to access items currently not present at this location. 'Add' allows you to add equipment items to the list to be available for 'Reservation' or 'Checkout'. These are items that are NOT

at this location. If you have equipment that has multiple locations then you can use 'Add Loc' to tell the system which locations to ignore. It automatically ignores the current location. When the System is launched and 'Special' is enabled, then a new menu 'Special' is displayed with these items in it.

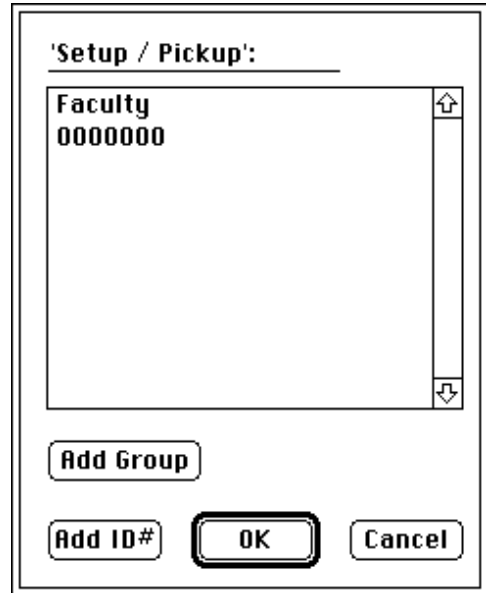
(**Note:** You can only access 'Special', if the system has an active 2 letter location.)

The screenshot shows a dialog box titled "Setup 'Special' access:". In the top right corner, there is an "Enable:" checkbox which is checked. The dialog is divided into two main sections. The left section is titled "Locations to Ignore." and contains a list box with the following items: NW, LB, HH, and BT. The right section is titled "Equipment Available on the 'Special' menu." and contains a list box with the following items: 16MM VIEWER and 16MM SPLIT REEL. At the bottom of the dialog, there are four buttons: "Add Loc", "Add", "OK", and "Cancel".

(**Note:** Items on lists can be deleted by holding the 'Option' key while selecting them)

Setup / Pickup

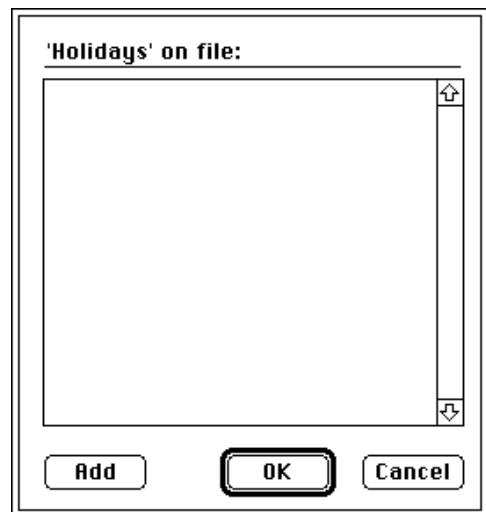
This allows you to control who has access to the 'Setup' or 'Pickup' Reservation functions. 'Add Group' gives you a list of active groups in the system, by default 'Faculty', 'Students' and 'Employee' will appear plus any other groups the user may have added. Choosing a group gives everyone in that group access to these functions. You can also add an individual ID number. The ID number must be currently on file in the database.



The screenshot shows a dialog box titled "'Setup / Pickup:'". It features a list box containing the text "Faculty" and "0000000". To the right of the list box is a vertical scrollbar with up and down arrow buttons. Below the list box are three buttons: "Add Group", "Add ID#", and "OK". To the right of the "Add ID#" button are two more buttons: "Cancel" and "OK". The "OK" button in the bottom right is highlighted with a double border.

Holidays

Allows you to make a list of dates when the system is closed. You cannot make Reservations or Checkouts for any date entered. It also does not let you bring back equipment on these dates. (*Note:* Dates added after Reservations or Checkouts have been made and that clash with those requests, will not affect them. They will still be noted as coming back on that date. Holidays should be set before any Reservation or Checkout data is entered for them to function correctly.)

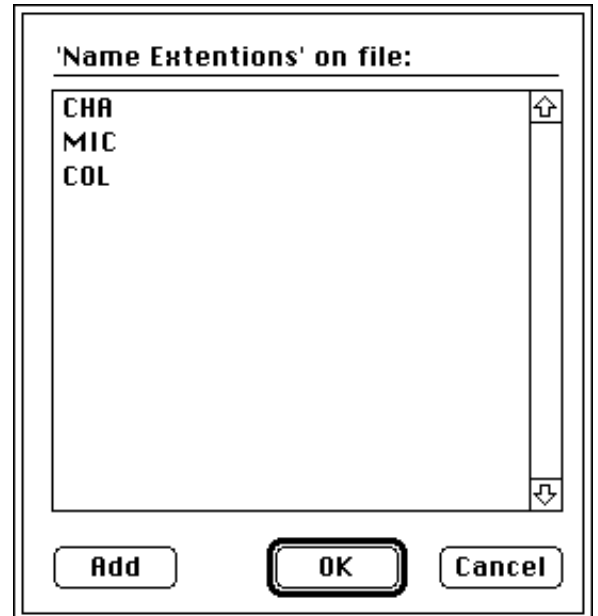


The screenshot shows a dialog box titled "'Holidays' on file:". It features a list box that is currently empty. To the right of the list box is a vertical scrollbar with up and down arrow buttons. Below the list box are three buttons: "Add", "OK", and "Cancel". The "OK" button in the bottom center is highlighted with a double border.

(*Note:* Items on lists can be deleted by holding the 'Option' key while selecting them)

Name Extensions

This allows you to enter special three (3) letter codes that can be used in ID numbers for special ID's. The system format for a persons ID number is customized for each site, e.g. You can use seven (7) numbers, '0000000'. If you added 'COL' to the 'Name Extensions' list then you would be able to add an ID number like 'COL0000'. This can be used to create a fake person, to which special requests are associated, i.e. if a piece of equipment is needed every Tuesday from 4 - 6 PM for Authorization purposes, then a fake person could have this Reservation request assigned to them. This way you can make a fake person and not worry about using a real ID number that is not currently in use, since it may cause a conflict later which an actual persons ID number.



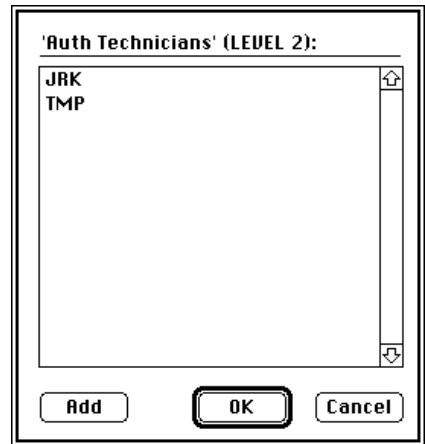
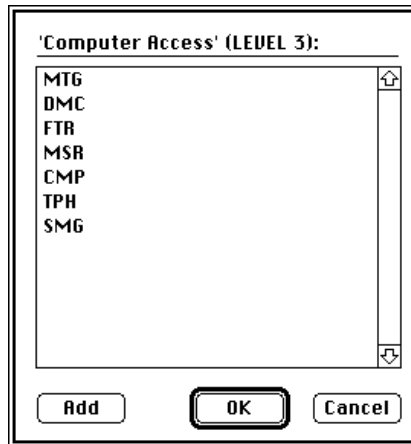
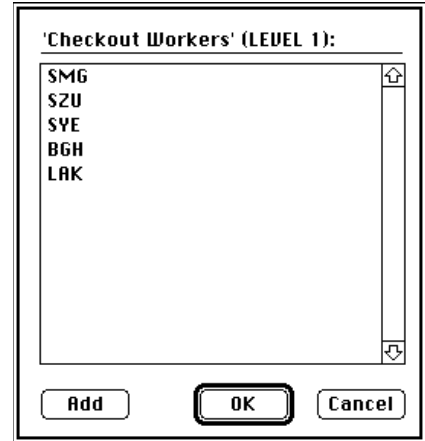
(**Note:** Items on lists can be deleted by holding the 'Option' key while selecting them)

Access Initials

This is a sub-menu that contains three (3) items: 'Checkout Workers...', 'Auth Techs...' and 'Computer Access...' and all work in a similar manner. Each one, when selected, presents a dialog that allows you to build a list.

Checkout Workers...
Auth Techs...
Computer Access...

These three lists are used to contain the initials or codes used by the system users to access the functions available to them when the system is launched. You have access to the level you are on and any level below you. These initials or codes are recorded each time they are used and the system operator can track any unauthorized access.

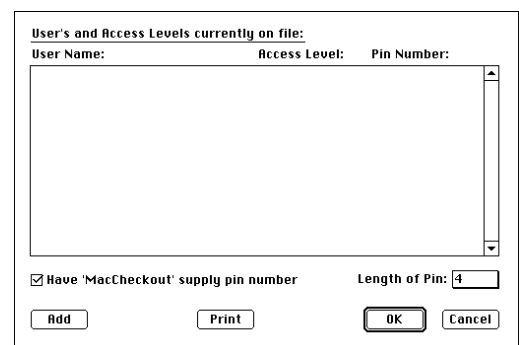


(*Note:* Level 3 is the highest level.)

Access Pin Numbers

Access Pin Numbers

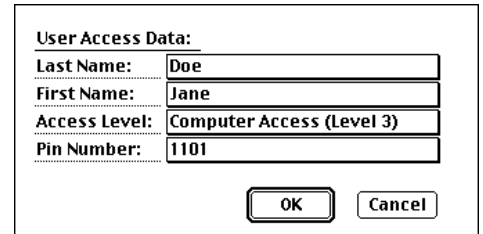
'Access Pin Numbers' is a new item on the 'System Setup' menu. It displays this dialog. It allows you to enter a workers name and assign them a level and pin number which can then be used to access the functions in MacCheckout. The levels work the same as in 'Access Initials' but the pin numbers give you some more security as they are harder to guess than peoples initials.



(*Note:* Items on lists can be deleted by holding the 'Option' key while selecting them)

You MUST set a 'Length of Pin' before you enter any names, if you want to use the 'Have "MacCheckout" supply pin number'. The later is a toggle that can be 'ON' or 'OFF'. If it is 'OFF', then 'Length of Pin' is ignored and you have to enter the pin numbers manually.

Selecting 'Add' will display a series of dialog boxes that allow you to enter the persons 'Last Name', 'First Name' and 'Access Level'. You will also be asked for a 'Pin Number' if the 'Have ...' option is turned 'OFF'. This dialog is then displayed to let you edit any of the values before you actually assign them.



The dialog box titled 'User Access Data' contains four input fields: 'Last Name' with the value 'Doe', 'First Name' with 'Jane', 'Access Level' with 'Computer Access (Level 3)', and 'Pin Number' with '1101'. At the bottom right are 'OK' and 'Cancel' buttons.

'Print' will allow you to print out the list of users on file along with their pin numbers.

Cables

This allows you to create a global list of cables that are available for 'Checkout'. No cable can be reserved.

All available cable ends are added using the 'Add' button.

You then 'build' the cables by selecting two ends, one after another to make a cable appear in the 'Cables' list.

Example: 'BNC>>BNC' was created by:

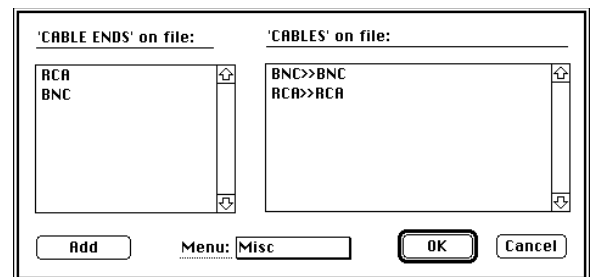
- a/ Select BNC = 'BNC>>' in 'Cables'
- b/ Select BNC again = 'BNC>>BNC' in 'Cables'

If you 'Option' click on a cable you can delete it.

If you 'Option' click on a cable end you can delete it and / or all cables using that end.

Clicking beside the 'Menu' option gives you a pop-up list of all menus that will be active in the system after launch. You can then choose which one 'Cables' will appear on.

(*Note:* The menu will be the same for 'Accessories', (if applicable).)



The dialog box has two list boxes. The left one, titled 'CABLE ENDS on file:', contains 'RCA' and 'BNC'. The right one, titled 'CABLES on file:', contains 'BNC>>BNC' and 'RCA>>RCA'. Below the lists are 'Add', 'Menu: Misc', 'OK', and 'Cancel' buttons.

(**Note:** Items on lists can be deleted by holding the 'Option' key while selecting them)

Accessories

This allows you to create a global list of 'Accessories' that are available for 'Checkout'.

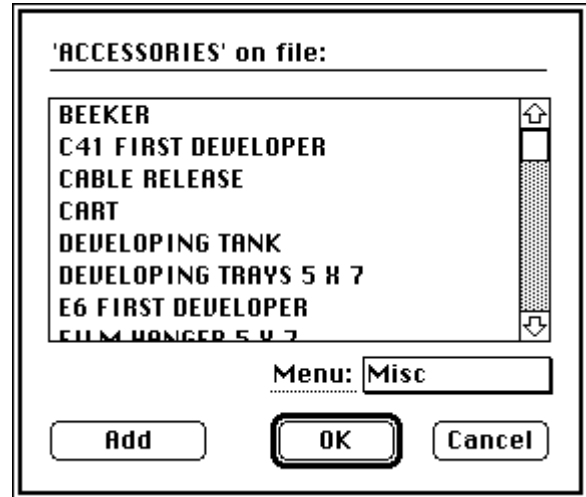
No Accessory can be reserved.

Items are added to the list by selecting 'Add' and typing in the new item.

An Item can be deleted by 'Option' clicking on it.

Clicking beside the 'Menu' option gives you a pop-up list of all menus that will be active in the system after launch. You can then choose which one 'Accessories' will appear on.

(**Note:** The menu will be the same for 'Cables', (if applicable).)



(**Note:** Items on lists can be deleted by holding the 'Option' key while selecting them)