

## **Equipment**

---

The following section describes all the functions related to managing the data on file for equipment.

---

This page has been intentionally left blank.

# Equipment Record

The equipment record card comes in two forms:

Equipment Specific Data		Type Global Data
Type:	2 1/4 CLOSE UP LENS	
Category:	Camera	
Out:	Yes	
Access:	72 Hrs	
Fine:	\$3.00	
Auth:	G	
Lv.Bldg.:	Yes	
Hrs:	0	
Rental Fee:	\$20.00,Per Day	

Menu Color ■

F10 Print F11 Save F12 Cancel

EQUIP DATA

This card displays the information that is in common with all the equipment items listed under this type. It will be referred to as the 'Type Global Data' card in this part of the documentation.

This card is used by 'Equipment Add...' or 'Equipment Edit...'. If you are adding a new item, this screen will be displayed by default and all the data boxes will be blank. You will then either choose a type for the new piece of equipment to belong to, or enter data into a sequence of dialog boxes that will fill the blank records in turn. Selecting 'Cancel' at anytime in the dialog boxes will give you the opportunity to abort the sequence. In the case of 'Equipment Edit...', this card will only be accessible by clicking the 'Type Global Data' tab at the top of the screen. You must be in 'Unlaunched' mode to be able to edit any of the global data fields.

Type Global Data

The 'Equipment Specific Data' tab at the top of the screen gives you access to the information specific to an individual piece of equipment that is listed under this particular type.

Equipment Specific Data

This card displays the information specific to the actual piece of equipment. It will be referred to as the 'Equipment Specific Data' card in this part of the documentation.

It is the default screen when you use 'Equipment Edit...'. It can also be accessed from 'Equipment Add' by clicking on the 'Equipment Specific Data' tab at the top of the screen.

**Equipment Specific Data**

When adding a new item, you will be presented with a sequence of dialog boxes, where you can enter the data for the required data record. This sequence can be aborted at anytime by using the 'Cancel' button.

All the data boxes under 'Type Global Data:' (with the exception of 'Rental Fee'), as well as 'Location:' and 'Status' must be filled in. 'Rental Fee' is dependent on the system settings. All the other items are optional. Of the remaining items only data entered for: 'Value:', 'Purch.:', 'Warr's:' must match particular formats, e.g. a valid dollar amount or a valid date.

When adding a new item or editing a current item, any of the data can be changed at anytime by using the appropriate on-screen button.

(*Note:* All the data under 'Type Global Data:' is applied to every individual equipment item associated with the 'Type'.

**Type Global Data**

---

When adding a new piece of equipment the following items are triggered automatically. When editing an item, you have to click each button individually.)

The new data will not be saved until you select the 'Save' button.

### **Type Global Data**

#### **Type:**

'Type' is the name that the item is going to be listed under in one of the menus that appear after the system is launched. Selecting the button will present you with a dialog listing all the equipment types currently on file, as well as give you the opportunity to add a new one.

*(Note: The list of equipment types will only contain types which have equipment numbers whose two letter suffix matches the one entered, e.g. 'P-50-LO'. All equipment numbers entered under a type must have the same two letter suffix.)*

*(Note: A menu can hold about 28 items before it starts to scroll. Tests have shown that scrolling menus confuse new users so you should limit the number of types in your system to about 200. This total comes from the fact that you can fit about seven (7) menus onto a 13in monitor and each menu can have 28 items,  $7 * 28 = 196$ .)*

#### **Category:**

'Category' is the menu name that the equipment type will appear in when the system is launched. Selecting the button will present you with a dialog listing all the category names currently on file, as well as give you the opportunity to add a new one.

*(Note: The system supplies a 'Function' and 'Edit' menu when it launches. That leaves room for about eight (8) more menus depending on how long the names are. If you are going to use a 'Special' menu, (noted earlier) then there will only be room for seven (7) menus. So when you are creating Category names, keep this in mind.)*

#### **Out:**

'Out' allows you to decide if this equipment type can be checked out or not.

#### **Access:**

'Access' allows you to set the time period that the equipment can be checked out or reserved for. Selecting the button presents a dialog that lists the following: 'SAME DAY', '1 DAY', '2 DAYS', '3 DAYS', '24 HRS', '48 HRS' and '72 HRS'. You can add other options as needed, they must be either 'a number of hours' or 'a number of days'. Any others currently on file will also be added to the list.

*(Note: 'DAYS' and 'HRS' work differently. An item with '2 DAYS' access can be*

---

checked out for two days from today. It can come back at any time on the second day. However, an item with '48 HRS' access MUST come back within 48 hrs of NOW. A small but important difference, depending if you want to be strict about how many hours access you want people to be able to have.)

**Fine:**

'Fine' is the dollar amount that a person will be fined if he/she is one day late returning the equipment. The fine is calculated based on whole and partial days, e.g. a person is 8 hrs late returning the item, then the fine amount will be 1/3 of the day total, since 8 hrs / 24 hrs = 1/3.

**Auth:**

'Auth' is used to decide if this equipment type is 'Authorized' or 'General'. If the item is 'General' then anyone can have access to it. (See 'System Restrictions') If the item is 'Authorized', only people who are 'Authorized' for this particular equipment type will have access to it.

**Lv.Bldg.:**

'Lv.Bldg.:' is used to decide if this equipment type can leave the building or not. If you select 'No' then you will not be given the opportunity to print an 'Equipment Pass' as part of the 'Agreement Form'.

**Hrs:**

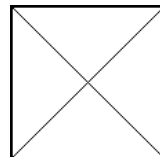
'Hrs:' is used to denote what the weekly reservation limit, in hours, an item has. Entering 0 or 148 means that there is no limit. (148 is the number of hours in a week.) You will then be asked if this limit is for each piece of equipment or the group as a whole. The system then checks to see if the person making the reservation request will exceed that limit. The routine to calculate the number of hours the person currently has the item (or each item in the group) for on file, calculates all the possible week combinations around a particular day, e.g. if the reservation request is on 'Tues' then it will create week totals starting six (6) days before to six (6) days after, moving forward one (1) day at a time to see if at any time the week limit is exceeded.

**Rental Fee:**

'Rental Fee:' is used to assign a rental value to the this type of equipment. It will be used in the event that a rental invoice needs to be generated. (*Note:* This will be disabled, if the 'Rental' system is turned off using 'Rental Setup' under the 'System Setup' menu.

The screenshot shows a dialog box with the title "What is the rental fee for 'P-50-L0' ?". It contains a text input field for the fee amount. Below the input field is the question "What is the rental fee charge method:". There are four radio button options: "Per Hour", "Per Day" (which is selected), "Per Week", and "Per Month". At the bottom right of the dialog box are two buttons: "OK" and "Cancel".

The area denoted by a white square in the illustrations can be used to display a picture of the equipment. The 'Type Global Data' card and the 'Equipment Specific Data' card both have these squares. The folder 'MacCheckout->EImages' is used to hold the image files. The image must either have the same name as the actual equipment number or the equipment type and be 112 \* 112 pixels square. Any other data will be cropped. The image should also be 8 bit, dithered and saved using the system palette.



Both cards also have a 'Menu Color' square. All equipment is listed by 'Type' in the menu bar when the system is launched. The color chosen will be used to display the text of that particular item.



**The rest of the items are specific to each individual piece of equipment:**



This button has the number of the piece of equipment on it. Selecting it will allow you to type in a name descriptor for that item. If a descriptor is present then it will appear along with the equipment ID number, anywhere it appears in the system.



(*Note:* This example comes from the reservation / checkout card after a piece of equipment has been selected. 'Close Lens' was the descriptor added to 'P-50-LO'.)

This group of items data is obvious and you only need to enter what you want to. Of all the items only 'Value:' and 'Purch.:' need to be in a particular format.

- Owner:
- Manuf.:
- Model #:
- Serial #:
- Value:
- Purch.:
- P.O. #:
- Barcode:

'Value:' is a dollar amount representing the cost of the item.

(*Note:* The '\$' sign will be added for you if you do not enter it as part of the numerical amount. The format for the amount is '\$#.##'.)

'Purch:' is the date that the item was originally purchased.

(*Note:* The format for the date is '#/#/##', '##/#/##' or '##/##/##'.)

(*Note:* 'Manuf.' stands for 'Manufacturer'.)

(*Note:* 'Barcode' is either 'Yes' or 'No'. It signifies if the item has been barcoded or not. The 'Export info For Barcode' function can use this field to only barcode items that need to be barcoded, if the option is used.)

**Location:**

'Location' is used to denote where the item is. The location can take two forms:  
1/ a two letter code, e.g. 'PH'.  
2/ a two letter code with an item, e.g. 'PH W/M-1-MC'.  
Only items with two letter codes can be reserved or checked out. The other item is used for inventory purposes to denote items that are situated with other items, e.g. Lights in a Light Kit, where it is the Light Kit a person will be reserving.  
(*Note:* If the system has a main location, then only items with a location matching the current system location will be directly available for reservation or checkout.)

**Status:**

'Status' is used to denote if the item is 'ON LINE' or 'OFF LINE'. 'ON LINE' means that it is available for reservation and checkout. In the event that an item is 'OFF LINE', then 'ON LINE' is replaced by a date. This is the date that the item is due back 'ON LINE'.

**Warr's:**

'Warr's:' is used to list the dates that the labor and parts warranties on the item will expire. You will have to enter two dates, one for each item.



'Accessories:' and 'Misc Data:' follow the same rules. Selecting the button will present you with a list of the global data currently on file. You will also be allowed to add new items to the lists.



Clicking on an item in the field will give you the option to edit the data.

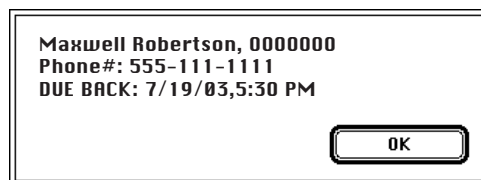
Clicking on an item in the field with the 'Option' key down will delete the item.



'Accessories' has one special item. That is the little square button beside it. Clicking on it will turn it on. (Denoted by the 'X'.) Clicking again will turn it off. When this equipment type is selected from the menu bar in 'Reservation' or 'Checkout', the system checks to see if this item is on. If it is, then when the equipment numbers are displayed in the selection field for you to choose which item you want to reserve or checkout, all the accessories for that item will be displayed also.

**Checked Out**

'Checked Out' is only visible when the item is currently checked out. Clicking on the button will display a dialog stating who has the equipment, the persons phone number and when it is due back.  
(*Note:* If you turn on the 'It's Here' option under 'Operating Flags' in the 'System Setup' menu. Then there will be a button called 'It's Here!' on the dialog also. Clicking on it will automatically return the item.)





**Repair Log:**

'Repair Log' searches all the repair files currently in the folder 'MacCheckout->repair' for this piece of equipment. It then displays any occurrences for you to print or view.

**Reservations:**

'Reservations' allows you to view or print all the reservations currently on file for this piece of equipment.

**Last 6 Users:**

'Last 6 users' allows you to view or print the names of the last six (6) people to check this piece of equipment out. The data includes the dates and times that the person requested the equipment for, plus the actual time it was returned.

**Statistics:**

'Statistics' gives you the choice of viewing the usage statistics either by 'Time' or 'Dept.'.

The 'Time' option displays the following dialog. It breaks down the usage for the item since it was purchased. The 'Statistics Since Purchase:' fields which are zero here, keep a running total of use since the item first went on line.

User Statistics for: M-5-MC								
<b>Semester Statistics to Date:</b>				<b>Statistics Since Purchase:</b>				
# of Student Users: 2				# of Student Users: 0				
# of Faculty Users: 1				# of Faculty Users: 0				
				<b>Total Usage to Date: 0</b>				
Semester Usage by period:								
	Mon	Tue	Wed	Thu	Fri	Sat	Sun	
AM:	0	0	0	0	0	0	0	
PM:	0	0	0	0	0	0	0	
EVE:	0	0	0	0	0	0	0	
ALL-DAY:	0	3	2	0	0	0	0	
<small>(Note: Usage by period does not equal # users since 1 person can have an item for multiple periods.)</small>								
							<input type="button" value="Print"/>	<input type="button" value="OK"/>

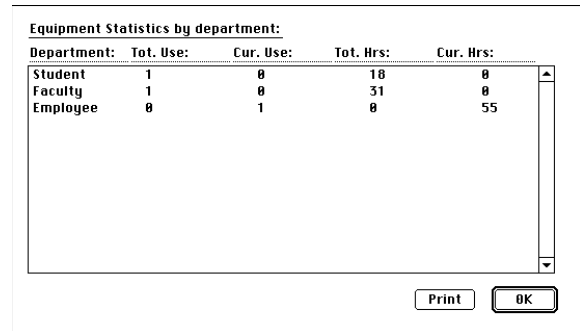
The 'Semester Statistics to Date:' contains the actual number of times the item has been checked out since the data was last reset. It is these two (2) numbers plus the four (4) \* seven (7) grid that gets zeroed out when 'Reset User Statistics...' is selected in the 'Cleanup Utilities' menu. Before the data is set to 0, the two (2) semester numbers are added to the appropriate 'Statistics Since Purchase:' fields, with the total being updated accordingly.

The 'Semester Usage by period:' breaks down the checkout requests by time slot. A checkout going over two or more time slots on a particular day, e.g. 9 - 5 is noted as an 'All-Day' item. If a checkout goes over multiple days, then a time slot on each day is noted, e.g. Mon 9am - Wed 9am, would result in one (1) getting added to Mon 'All-Day', Tues 'All-Day' and Wed 'AM'. One checkout would record three (3) items. As a result these values never equal the actual number of checkouts recorded. This is used to track the busy time periods of the week, so that the system operator can assign his/her staff accordingly.

---

The 'Dept.' option displays the following dialog.

This breaks down the usage by department and actual whole checkout events. The 'Use' columns counts the number actual checkouts and the 'Hrs' columns lists the number of hours the item was checked out for.



The dialog box titled "Equipment Statistics by department:" contains a table with the following data:

Department:	Tot. Use:	Cur. Use:	Tot. Hrs:	Cur. Hrs:
Student	1	0	18	0
Faculty	1	0	31	0
Employee	0	1	0	55

At the bottom right of the dialog box are two buttons: "Print" and "OK".

As with the previous 'Statistics' dialog, the 'Cur.' items are for the current active period and the 'Total' items are for the ongoing total to date, since the purchase of the piece of equipment. As with the 'time' statistics, 'Reset User Statistics' will add the current values to the total values, before zeroing out the current values.

The equipment type can be color coded in the menu bar by clicking on the small square beside 'Menu Color'. It will present you with a color palette of 254 colors. You select the one you want and this type will be shown in the color selected the next time the system is launched.



(*Note:* You cannot choose white as the color since the menu is white. This feature is only available in 8+ bit (256+ color) mode.)

Finally the data can be saved and printed using the on screen buttons.



(*Note:* When the system is 'Launched', you can access the equipment ID cards through 'Find ID'. The only limitations are that you cannot change the 'Type Global Data:', the changes are automatically saved for you and you need the correct access to edit the data. This access will depend on what settings the system operator chooses during 'Setup'.)

## Other Equipment Related Functions

---

### **Equipment Delete**

*'Equipment Delete...'* is located under the 'Equipment' menu.

This allows you to delete a piece of equipment. It will ask you what item you want to delete and then give you the option to 'Print/Delete' or 'Delete'. The 'Print/Delete' option will give you a print out of the data currently on file for that piece of equipment before it is deleted. You cannot delete an item that has reservations associated with it, or if it is currently checked out.

(*Note:* There is no undo for this function.)

### **Type Edit**

*'Type Edit...'* is located under the 'Equipment' menu.

This will be dealt with in the next section.

### **Equipment Accessories**

*'Equipment Accessories...'* is located under the 'Equipment' menu.

This allows you build a global list of accessories associated with equipment. This list is stored and can be accessed anytime a person is adding or editing a piece of equipment in the system. Clicking the 'Accessories:' button on the equipment ID card will display the list. From there any item can be selected and added to the equipment record.

Selecting this menu item will display a dialog. Items can then be added, edited or deleted. You delete an item by clicking on it while holding the 'Option' key down. (*Note:* When you delete an item, it is only removed from the list, not from any piece of equipment that it is associated with.)

Selecting the 'Add' button will allow you to add a new item. By default the dialog will only display one item '^'. This is a special item. Selecting it will allow you to add any item, e.g. a serial number or the number of another piece of equipment. Similarly, when you add a new item, you can append this to it and the system will automatically request further information from you each time it is select, e.g. 'Lens (^)' can be added to the list. Selecting it from an equipment card will result in the prompt 'What would you like to associate with this item?'. You can then enter the serial number of the lens, e.g. 123, which will result in the entry 'Lens (123)' being added to the equipment card. This stops you from adding a new 'Lens' entry for every lens you own.

---

### **Equipment Misc.**

*'Equipment Misc. ...' is located under the 'Equipment' menu.*

This functions in a similar way to 'Accessories' except that it does not support the '^' data method. This can be used for storing items like bulb types or fuses that certain equipment items may require. Those items can then be assigned to the equipment cards. This data can then be used at a later date, in the event that an item needs to have a bulb or fuse replaced. The person using the system can reference the equipment ID card of the item in question and find the pertinent information.

(*Note: 'F13' can be used to find out information about equipment. If you have an image of the piece equipment, either by type name or equipment ID number in the folder 'MacCheckout->EImages', then it will be displayed along with the rest of the information.*)

## Type Edit

'Type Edit' is a very powerful function for manipulating the global data for equipment types. It can also be used for moving equipment between different types.

Selecting 'Type Edit...' from the 'Equipment' menu will present you with a dialog containing a list of all types of equipment currently on file. Selecting one will present you with this card.

Type Global Data	
Type:	BARCODE SCANNER
Category:	Misc
Out:	Yes
Access:	Same Day
Fine:	\$5.00
Auth:	G
Lv.Bldg.:	No
Hrs:	0
Rental Fee:	

Equip # for Type (>>)
P-03-SC
P-07-SC

Menu Color

TYPE EDIT

F1 Save F12 Cancel

On the left are the all the data fields used for 'Type Global Data'. On the right is a field that contains all the equipment ID numbers currently assigned to this particular 'Type'.

Any data change will be presented with a 'R' beside it. Selecting the 'R' will reset the data back to original state and cause the 'R' to disappear. It will only affect the line beside the 'R'. If you want to get rid of all changes then use the 'Cancel' button to abort the current 'Type Edit'.

Type:	BARCODE SCANNER	
Category:	Misc	
Out:	No	R
Access:	Same Day	
Fine:	\$15.00	R
Auth:	A	R
Lv.Bldg.:	No	
Hrs:	0	
Rental Fee:		

---

**Type:**

'Type' is used for one of two things. It can either rename the current type or create a totally new one. Selecting 'Type' will present you with a dialog containing the names of all the types currently on file, that have equipment which has the same two letter suffix code as the type currently selected, e.g. 'P-03-SC' . You can then select a type or enter a new one.

(*Note:* The system will not let you enter the type name of one that already exists but whose equipment suffix does not match the one currently selected.)

Two things will then happen to the equipment associated with the current type if you save it to the new name selected.

1/ If the new type does not exist then the current type name is just renamed.

2/ If the new type name does exist then the current equipment items are added to the new type equipment items.

A complication can exist if you decide only to move some of the equipment items.

When a new or current type is entered into the 'Category' field then a new field with the button '<<< Re-Assigned:' will appear. Clicking on 'Equip # for Type (>>)' will move all the equipment numbers in that field to the new field. Clicking on '<<< Re-Assigned:' will move the items back.

Clicking on any individual equipment number will move it to the other field.

When the system saves the data to the new type, the old one is only removed from the system, if all of its equipment items are assigned to the new type.

The screenshot shows a dialog box with two list boxes. The top list box is titled 'Equip # for Type (>>)' and contains the entry 'P-03-SC'. The bottom list box is titled '<<< Re-Assigned:' and contains the entry 'P-07-SC'. Both list boxes have vertical scroll bars on their right sides.

(*Note:* The equipment numbers for a type must all have the same two letter suffix.)

**Category:**

'Category' is used to assign the type to a new category. This means that when the system launches that type will appear in a new menu. It is suggested that you do not do this often since it can confuse the users.

**Out:**

'Out' allows you to decide if this equipment type can be checked out or not.

**Access:**

'Access' allows you to change the time period that the equipment can be checked out or reserved for. Selecting the button presents a dialog that lists the following: 'SAME DAY', '1 DAY', '2 DAYS', '3 DAYS', '24 HRS', '48 HRS' and '72 HRS'. You can add other options as needed, they must be either 'a number of hours' or 'a number of days'. Any others currently on file will also be added to the list.

---

(*Note:* 'DAYS' and 'HRS' work differently. An item with '2 DAYS' access can be checked out for two days from today. It can come back at any time on the second day. However, an item with '48 HRS' access **MUST** come back within 48 hrs of NOW. A small but important difference, depending if you want to be strict about how many hours access you want people to be able to have.)

**Fine:**

'Fine' allows you to change the dollar amount that a person will be fined if he/she is one day late returning the equipment. The fine is calculated based on whole and partial days, e.g. a person is 8 hrs late returning the item, then the fine amount will be 1/3 of the day total, since 8 hrs / 24 hrs = 1/3.

**Auth:**

'Auth' is used to change if this equipment type is 'Authorized' or 'General'. If the item is 'General' then anyone can have access to it. (See 'System Restrictions') If the item is 'Authorized', only people who are 'Authorized' for this particular equipment type will have access to it.

(*Note:* Authorizations currently on file for a type that you change to 'General' are left in place. They will have no adverse effect on how the system operates.)

**Lv.Bldg.:**

'Lv.Bldg.:' is used to change if the equipment type can leave the building or not. If you select 'No' then you will not be given the opportunity to print an 'Equipment Pass' as part of the 'Agreement Form'.

**Hrs:**

'Hrs:' is used to denote what the weekly reservation limit, in hours, an item has. Entering 0 or 148 means that there is no limit. (148 is the number of hours in a week.) You will then be asked if this limit is for each piece of equipment or the group as a whole. The system then checks to see if the person making the reservation request will exceed that limit. The routine to calculate the number of hours the person currently has the item (or each item in the group) for on file, calculates all the possible week combinations around a particular day, e.g. if the reservation request is on 'Tues' then it will create week totals starting six (6) days before to six (6) days after, moving forward one (1) day at a time to see if at any time the week limit is exceeded.

**Rental Fee:**

'Rental Fee:' is used to assign a rental value to the this type of equipment. It will be used in the event that a rental invoice needs to be generated. (*Note:* This will be disabled, if the 'Rental' system is turned off using 'Rental Setup' under the 'System Setup' menu.



Clicking on the small white rectangle beside the 'Menu Color' label will allow you to choose a new color for this type. This is the color that it will appear in the menu bar in, when the system is launched.

(*Note:* You cannot choose white since the menu itself is white.)

Any changes that are made can then be saved or the whole thing can be cancelled. (*Note:* When saving the data, the old data is automatically used, if any of the new fields are left empty.)

