

## People

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

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# People Record

The people record card comes in two forms:

The screenshot shows a software interface for a 'People Record'. At the top, there are two tabs: 'System Related' and 'Personal'. The 'Personal' tab is selected. Below the tabs is a form with the following fields and values:

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

To the right of the form is a small portrait photograph of a man. On the far right, there is a vertical button labeled 'FIND ID'. At the bottom of the screen is a row of function key buttons: F5 View, F6 Email, F7 Find ID, F8 ? Res, F9 Reserve, F10 Checkout, F11 Form, and F12 Done (highlighted in green).

This card displays the information that is personal to the person involved. This includes their name, address and phone number.

This card is used by 'People Add...' or 'People Edit...'. If you are adding a new person, this screen will be displayed by default and all the data boxes will be blank. You will enter the appropriate 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 'People Edit...', this card will only be accessible by clicking the 'Personal' tab at the top of the screen. Due to data protection requirements, you will need this system password to access this area while the system is 'Launched'.

**Personal**

The 'System Related' tab at the top of the screen gives you access to the information stored on file for the person in relation to the system. This includes the equipment they are authorized for, any fines that they may have and any restrictions that are placed on their access.

**System Related**

System Related		Personal	
ID #:	0000000	<b>Fines:</b> \$1085.28 - MC \$18.43 - MC \$7.06 - MC	
Last Name:	Robertson		
First Name:	Maxwell		
Email Addr.:	mrobertson@hotmail.	<b>Reservations:</b> <b>Equipment Authorizations:</b> F - 16MM PROJECTOR PAGEANT,JUL03 M - 16MM PROJECTOR PAGEANT,JUL03 M - 16MM CAMERA BOLEX,JUL03	
Status:	Employee		
Dept.:			
Overnight:			
Access:	Open		
Limit:			
Days:			
Ban Until:			

FIND ID

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

This card displays the system related information specific to the person. It will be referred to as the 'System Related' card in this part of the documentation. It is the default screen when you use 'People Edit...'. It can also be accessed from 'People Add...' by clicking on the 'System Related' tab at the top of the screen.

System Related

In the case of 'People Add...', all the data boxes will be blank and you will have to sequentially answer the questions presented to you. If you decide to abort adding a new person, then selecting 'Cancel' in any of the dialogs will give you the opportunity to do so. The 'People Add...' function starts out with the 'Personal' card, once the data for that is complete, the 'System Related' card will be displayed allowing you to set the appropriate records for that section. If you use the 'OK' button in any of the dialogs and no data is present, they that record will be left blank. Certain items like the persons name will warn you if an item must have data entered. The only items that require data to be in a set format are: 'Email Addr:', 'State:', 'Zip:', 'Phone #:' and 'Soc Num #:'. All must be numbers of certain lengths with the exception of 'State:' which is two letters and 'Email:' which must be a valid email address.

*(Note: This illustration shows 'Access:' as being disabled. This will be covered later.)*

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When adding a new person, 'ID #:', 'Last Name:' and 'First Name:' are the only items that must be entered in the 'Personal' card. They are also displayed on the 'System Related' card so that you can see whose record you are accessing. Both cards also have an 'Email Addr;' address field. This may be disabled on your system, if the system administrator decides that you will not use that function. 'Access:' can also be disabled.

When adding a new person or editing a current person, any of the data can be changed at anytime by selecting the appropriate records button.

### **System Related Information**

**ID #:**

'ID #:' is the number that will be associated with the person for the duration of the time they are in the system. Once entered, it cannot be changed. No duplicate ID numbers are allowed and they must follow the correct format. In this illustration it is seven (7) numbers. It may vary for your system.

**Last Name:**

'Last Name:' is the persons last name. Any data can be entered here but something must be entered before the record will be accepted as being complete.

**First Name:**

'First Name:' is the persons first name, Any data can be entered here but something must be entered before the record will be accepted as being complete.

**Email Addr.:**

'Email Addr.:' is the persons email address. This must be a complete email address or just the persons user name, if you belong to an institution that gives out email addresses to their students. In that scenario, there is usually a consistent name after the '@' symbol. This only needs to be set once in the 'System Email Settings...' dialog under the 'Email' menu. It will automatically be appended to the persons user name when an email is sent to the person involved. (**Note:** 'Email' can be disabled if the system administrator does not want to use that function. In that event, this button will be disabled.)

**Address:**

'Address:' is the persons address. Any data can be entered here but it is not required for the record to be accepted as being complete.

**Apt#:**

'Apt#:' is the persons apartment number. Any data can be entered here but it is not required for the record to be accepted as being complete.

**City:**

'City:' is the city the person lives in. Any data can be entered here but it is not required for the record to be accepted as being complete.

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**State:**

'State:' is the state the person lives in. The data entered must be two letters, e.g. 'IL', 'MA', but it is not required for the record to be accepted as being complete. (*Note:* The system does not currently verify that the two letters entered actually matches a state, e.g. 'ZZ' will be accepted.)

**Zip:**

'Zip:' is the zip code for the persons address. The data entered must be five (5) numbers or a five (5) - four (4) combination, e.g. '00000', '00000-0000', but it is not required for the record to be accepted as being complete. (*Note:* The system does not currently verify that the zip code is a real zip code or actually matches the address entered.)

**Phone #:**

'Phone #:' is the persons phone number. The data entered must be in one of the following number formats: '#####', '###-#####', '###-###-####' or '#-###-###-####', but is not required for the record to be accepted as being complete. (*Note:* It is recommended that you have a current phone number for the person on file at all times. This helps you and the person. In the event that the person is late with the equipment you can call them up to inform them of the fact. Similarly, if a piece of equipment is broken or unavailable for a persons reservation then you can call them to let them know of the problem.)

**Soc Num #:**

'Soc Num #:' is the persons social security number. The data entered must be in the format: ###-##-####, but is not required for the record to be accepted as being complete. (*Note:* '\*\*\*\_\*\*-\*\*\*\*' will appear in the data box beside 'Soc Num #:' if there is a valid social security number on file for the person. This is to prevent anyone from reading this data. '??-??-????' will appear if there is data on file that does not meet the required format and the space will be left blank if there is no data on file. You must have level 3 access to edit the data in this field after the person has been added to the database.)

**Status:**

'Status:' refers to what the person is. The system supplies you with 'Student', 'Faculty' or 'Employee' as default options but you can add your own. This option should be set to allow the routines that require equipment usage numbers to work correctly. Similarly, this data must be set if you require the person to have access to the 'Setup' or 'Pickup' options. (*Note:* A list of labels can be created by using 'People Status Label' under the 'People' menu.)

**Dept.:**

'Dept:' refers to what department that the person belongs to. This option should be set if you want accurate equipment usage numbers by department. (*Note:* A list of departments can be created using 'Departments' under the 'People' menu.)

**Overnight:**

'Overnight:' is used to denote that the person has overnight access to the facility. If 'Disable Overnight' is set in 'Operating Flags' under the 'System Setup' menu, then

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this option will be disabled. In the event that the person is given overnight access, then 'Overnight Access' will be printed on any 'Agreement Form' the person receives from the system. This can then be used as a permission slip for the person to stay after hours.

#### **Access:**

'Access:' is used to denote what level of access the person has to the system. If 'Restrictions' are not turned on in 'Restrictions' under the 'System Setup' menu then this item will be disabled. In the event that 'Restrictions' are not on, then everyone gets the equivalent of 'Open' access. If 'Restrictions' are on then the person can have one of three access levels: 'Open', 'General' or 'Restricted'. 'Open' gives the person immediate access to all general equipment and any authorized equipment that they are subsequently authorized for. 'General' gives the person access to any general equipment that is placed on the 'General' equipment list under 'General' in the 'System Setup' menu. They can be subsequently authorized for certain equipment by adding them to a 'General' group in 'Mass Authorization'. (See the 'Mass Authorization' chapter.) 'Restricted' gives the person access to any general equipment that is placed on the 'Restricted' equipment list under 'Restricted' in the 'System Setup' menu. (*Note:* There is a special group code in 'Mass Authorization', '@Spc', that can be used to create groups of people. This lets you authorize people for equipment without changing their 'Status', e.g. 'Restricted'. You would need to do this if one of the types of equipment added to either list was 'Authorized'. See the 'Mass Authorization' chapter for more information.)

#### **Limit:**

'Limit:' is used to denote how long the person has access to the system. This can be used in the event of a person making up an incomplete class or a visiting person requiring access to equipment for a short period. The data entered has to be a valid date, e.g. '8/1/03', and has to be some time in the future. The person will then be able to reserve and checkout equipment up until and including that date. After that date they will be locked out of the system. If this is left blank then the system automatically defaults to the 'End of active period', if one is installed.

#### **Days:**

'Days:' is used to denote how many days in advance that the person can reserve equipment for. This can be used to control the access of people to equipment. Limiting the days in advance can stop people from reserving the same equipment for the same time weeks in advance, if that equipment is in limited supply. (*Note:* This used in conjunction with the 'Hour reservation limit' on equipment can be used effectively to limit peoples access to equipment.)

#### **Ban Until:**

'Ban Until:' is used to disable a persons access to the system for a certain period of time. This ban cannot be overridden up until and including the date set. During 'Shutdown' ban dates are queried. If it is the day before the ban expires, that will be added to the system report. The day that the ban expires, it will automatically

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be removed and the person will be listed in the system report as having their ban removed. This gives the system administrator two opportunities to extend the persons ban, if that is required.

### Reservations:

'Reservations:' is only enabled when a person has reservation(s) on file. Selecting this will allow you to print a reservation listing for the person, if they require it. (*Note:* This duplicates the 'Print' option in '? Res', when the system is launched.)

### Fines:

\$1085.28 - MC	↑
\$18.43 - MC	
\$7.06 - MC	↓

'Fines:' allows you to apply a fine to a person. This is useful in the event that a person damages or abuses equipment and must pay for the repair. Selecting it will take you to the Fine card. (Illustrated in the next section.) From there you can make of fine of any type. When you are done you will be brought back to the persons ID card. Clicking on an actual fine amount will give you the option to 'Print' the fine card, in the event that the person wants to pay it or 'View' the Fine card. The last option being the one you would choose if you wanted to delete the Fine card from the persons record. In either case, when you are done you will be returned to the persons ID card.

### Equipment Authorizations:

F - 16MM PROJECTOR PAGEANT,JUL03	↕
M - 16MM PROJECTOR PAGEANT,JUL03	
M - 16MM CAMERA BOLEX,JUL03	

'Equipment Authorizations:' can only be used if the system does not have 'Restrictions' turned on. If they are off, then you will be able to select this and be presented with the list of authorized equipment that is currently on file. Selecting an item will append it to the current list, along with the month and year. This authorization will then be valid for one (1) year or until the system operator removes it, either by deleting it or using the right option when clearing data from the system. (See the 'CleanUp Utilities' chapter.)

The person is authorized for the item immediately after it is added to the list. He/she will then be able to reserve or check out equipment items associated with it. An authorization can be revoked by clicking on the piece of equipment. You will then be given the option to remove the item.

In the event that restrictions are on, then all authorizations are made through 'Mass Authorization'. This includes revoking the authorization also. (See the 'Mass Authorization' chapter.)



The image of the person is displayed automatically, if there is a pict file with a name that matches the persons ID number in the folder 'MacCheckout->PIimages'. The image should be 112 \* 112 pixels square. Any other data will be cropped. The image should be 8 bit, dithered and saved using the system palette.

(*Note:* 'F13' can be used to find out information about a person. If you have an image of the person in the folder, then it will be displayed along with the rest of the information.)



# Fines

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Under 'People Add...', 'People Edit...' and 'People Delete' in the 'People' menu is the section that deals with fines. Fines can exist for two reasons: a person returned equipment late and a fine card was automatically generated, and a fine was imposed on a person for damaging or abusing equipment and they are liable for the cost of the repair.

## Fine Report

Periodically you might need to generate a report of all the fines currently in the system. 'Fine Report...' can be used to do this. Selecting the menu item will ask you to confirm that you want to do this.

Selecting 'Yes' will then bring up another dialog asking if you want the peoples phone numbers included in the report.

Selecting 'Yes' or 'No' will then cause the system to generate the fine report. If the report is longer than five (5) pages you will be asked if you want to print it.

(*Note:* All report generating functions ask you to confirm that you

want to print the data, if it is longer than five (5) pages. This is due to the fact that printing takes a long time and will tie up the system for some time.)

Selecting 'Print' will generate a columnar report. This report will contain the following data on the people with fines: 'Last Name', 'First Name', 'ID number', 'Phone number' (if requested), 'Fine Amount' (and ' (H)', if it is a 'Hold'), and the location where the fine was created, in the event that multiple locations are involved.)

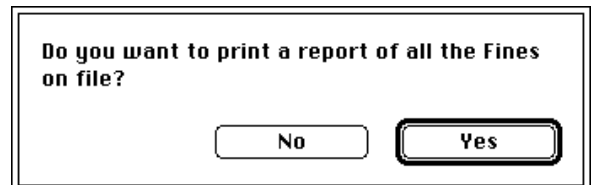
(*Note:* See the 'Multiple Locations' chapter for more information.)

The data is sent directly to the printer, so you should ensure that it is on before you generate a Fine report.

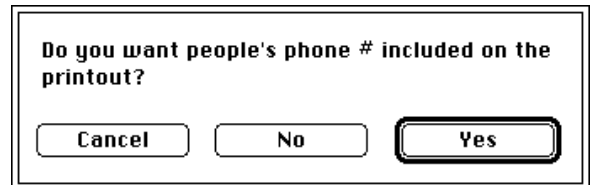
The option to include the phone numbers of the people involved is for two reasons.

1/ You can create a report without phone numbers that you can post in a central location. People can then read this report and know that they have a fine to pay. Peoples phone numbers are considered private information and therefore should not be included.

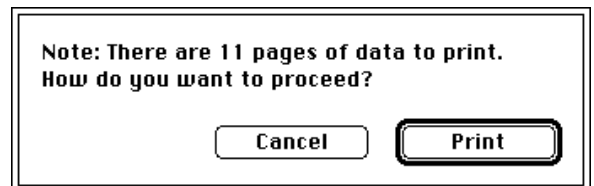
2/ You can create a report with phone numbers for internal use. This list can then be used to call all the people in question to warn them that they have a Fine to pay.



Do you want to print a report of all the Fines on file?



Do you want people's phone # included on the printout?



Note: There are 11 pages of data to print. How do you want to proceed?

(*Note:* Whether your system even generates Fines or Holds will depend on the options that the system operator has set in 'Operating Information...' under the 'System Setup' menu. If values have not been entered for 'Fine' and/or 'Hold' then the system will not be able to create one or both.

'Fine Add...' and 'Fine Delete/View...' present you with the same card. There are a couple of different options available to you for each task.

## Fine Add

'Fine Add...' is used to impose a Fine on a person. After entering the persons ID number you will be presented with this card.

Name:	Robertson, Maxwell	Location:	MC
ID #:	0000000		115 S. Michigan Ave.
Date:	7/24/03	Equipment Information:	
Status:	Student		
Phone #:	555-111-1111		
Checkout:	,		
Return:	,		
Actual Ret:	,		
Overdue:			
Abuse:		Total:	

From here you can create a fine.

### Equipment Information:

Selecting 'Equipment Information:' will display this dialog. You can enter either a valid equipment ID number or the reason for the fine, e.g. 'Person dropped a camera and broke the lens', in the field labelled 'Equip # / (Reason):'. If you enter the ID number of a piece of equipment in the system, you can then click 'OK'. The system will look that item up and enter the Fine 'Amount Per Day' currently on file for

Enter Equip # or reason (and fine \$) below:

Equip # / (Reason):

Amount per day:

Note: If you enter only a valid equip #, then the 'Amount per day' will be entered for you, if item is on file.

OK Cancel

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an item of that type. If you enter an equipment ID number not on file, or a reason for the fine, then you must enter a valid dollar value. This value will be used as the Fine 'Amount Per Day' for that data. You can enter another item by selecting that button again.

- Checkout:**
- Return:**
- Actual Ret:**

'Checkout:', 'Return:', and 'Actual Ret:' are the times that the person has the equipment for.

'Checkout:' is the time when the item was taken out.

'Return:' is the time that the item was due back.

'Actual Ret:' is the time when the item was actually returned.

Selecting each item will bring up the following dialog. The current date and time is automatically entered in the dialog. When you are imposing a fine, you can either enter this data, if it relates to a piece of equipment or leave it blank.

**Enter Date & Time for:**

Checkout	Date:	7/24/03
Checkout	Time:	2:30 PM

OK Cancel

The only rule that applies is that

'Checkout;' must be earlier than 'Return;' with must in turn be earlier than 'Actual Ret:'.

(*Note:* 'Checkout' was the option selected for this dialog. The 'Checkout' wording will be replaced by whatever date function option you select.)

**Overdue:**

'Overdue:' is the length of time that the equipment is late. Selecting it will bring up this dialog. Any valid values can be entered. It will be the data entered here multiplied by the Fine 'Amount Per Day' and totalled that will give you the grand total of the persons Fine.

(*Note:* If you enter the above dates and times correctly then this data is automatically filled in for you.)

**Enter Data for:**

Days Overdue:	
Hours Overdue: (0 to 23 limit)	
Minutes Overdue: (0 - 59 limit)	

OK Cancel

**Abuse:**

'Abuse' is used to note if the Fine has been imposed because someone abused the equipment. Selecting this will give you the option of 'Yes' or 'No'.

(*Note:* The section on 'Fine Delete/View...' shows you a Fine card with data in place.)

When all the data is entered, the Fine will be automatically totalled for you. You can then 'Print', 'Save' or 'Cancel' the procedure.

'Print' will print the card and leave you at the current Fine card.

'Save' will save the data and take you back to the screen you were on. This will be either the 'Unlaunched' screen or the ID card for that person.

'Cancel' like 'Save' will take you back to the screen you were on before, but no data will be saved.

(*Note:* If 'Email' is enabled in your system, you will also have an email option at the bottom of the screen. If the person who has a fine also has a valid email address then, you will be able to electronically send a copy of the fine to the person.)



<b>Name:</b> Robertson, Maxwell		<b>Location:</b> MC		FINE DATA
<b>ID #:</b> 0000000		115 S. Michigan Ave.		
<b>Date:</b> 7/27/03		<b>Equipment Information:</b>		
<b>Status:</b> Student		M-16-HT	\$3.00    \$7.22	
<b>Phone #:</b> 555-111-1111		M-15-HT	\$3.00    \$7.22	
<b>Person's List of fines on file:</b>		M-13-HT	\$3.00    \$7.22	
\$21.66 - MC		<b>Total: \$21.66</b>		
<b>Checkout:</b>	7/24/03, 1:30 AM			
<b>Return:</b>	7/24/03, 4:00 PM			
<b>Actual Ret:</b>	7/27/03, 1:44 AM			
<b>Overdue:</b>	(2:9:44)			
<b>Abuse:</b>	No			
		F10 Print    F11 Delete    F12 Cancel		

**Fine Delete/View**

'Fine Delete/View...' is used to view a Fine card currently on file. It can also be used to print a copy of a Fine or to delete a fine that needs to be removed. Selecting this option will bring up the following card.

(*Note:* This card illustrates a Fine card that was automatically generated because the equipment was returned late. Notice that there are NO on screen buttons, unlike the Fine card displayed under 'Fine Add...'. This is because the fine already exists and once on file, it cannot be edited or altered in anyway.)

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When a fine is created it is automatically coded with the location and address that it was created at. Only fines created at the current location can be deleted at that location.

(*Note:* This issue will be dealt with in the 'Multiple Locations' chapter.)

All the fine amounts on file for a person are listed under 'Person's List of fines on file:'. Each amount is followed by the location that it was created at. Clicking on a dollar value will cause that Fine card to be displayed.

Since the 'Print', 'Delete' and 'Cancel' buttons only function on the Fine card currently displayed, you must make sure that you are viewing the correct fine before using these functions. This is especially true of 'Delete', since there is no undo after you delete a fine card.

(*Note:* To undo a wrongly deleted fine card, you must create a new fine card for the person using the old data.)



'Delete' deletes the Fine card from the System.

(*Note:* There is NO undo.)

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# People Extras

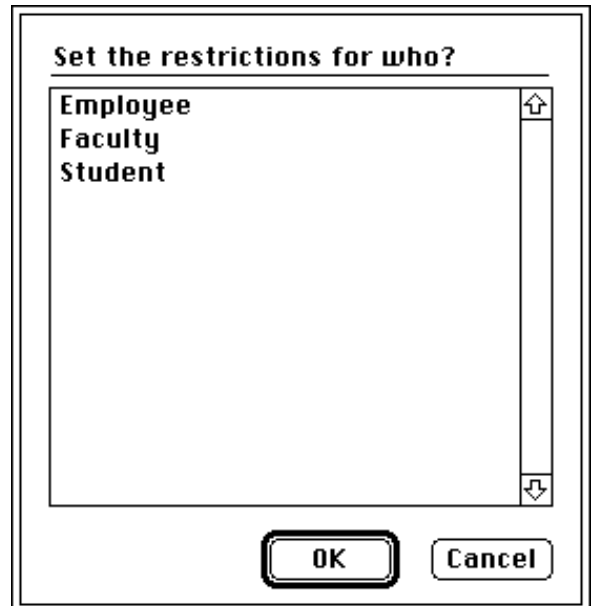
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Three items remain on the 'People' menu that have not been covered in this chapter, 'People Restrictions...', 'People Status Labels...' and 'Departments...'

**People Restrictions** 'People Restrictions...' presents you with a list of all the types of people that are currently in the system. The type of a person is what they are coded as under 'Status'. The system defaults to 'Employee', 'Faculty' and 'Student'. The system operator can add other items as needed using 'People Status Labels...' under the 'People' menu. Any other labels added to the system will also be displayed in the dialog. Selecting a label will allow you to set the 'Access' for everyone that has that 'Status' to 'Restricted', 'Open' or 'General'.

You will have to confirm that you want to do this before proceeding. (*Note:* This is similar to the 'Cleanup Utility' item 'Set Restrictions...'. However, that sets the 'Access' for everyone in the whole database.)

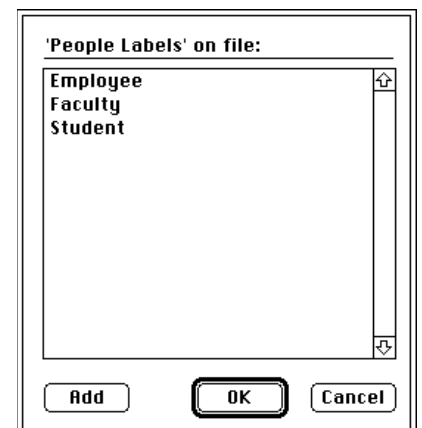
(*Note:* If the system restrictions are disabled, then this menu item will be disabled. System restrictions can be enabled by using 'Restrictions...' under the 'System Setup' menu.)



## People Status Labels

'People Status Labels...' presents you with a list of all the types of people currently in the database. The system defaults to 'Employee', 'Faculty' and 'Student'. New labels, e.g. 'Visiting Artist', can be added by selecting the 'Add' button. Items can be deleted from the list by selecting an item while holding the 'Option' key down.

(*Note:* Deleting an item will not affect the system. People currently on file and coded for that item, are left as is. 'Employee', 'Faculty' and 'Student' are protected and cannot be deleted.)



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## Departments

'Departments...' presents you with a dialog box where you can build a list of departments that people belong to. This list is then displayed during the 'Department' question when entering a new person into MacCheckout, or editing that particular record. New departments, e.g. 'Photography', can be added by selecting the 'Add' button. Items can be deleted from the list by selecting an item while holding the 'Option' key down.

(*Note:* Deleting an item will not affect the system. People currently on file and coded for that item, are left as is.)

