

Functions Menu Items

The following section describes all the functions that are contained in the 'Functions' menu. The two exceptions are 'Cleanup Utilities' and 'Mass Authorizations' which are important enough to warrant their own chapters.

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Functions

The 'Functions' Menu contains all the non-reservation and Checkout related functions used in the system. The contents of which are illustrated here (**Note:** Items that are available on the 'Functions' menu after launch are denoted with a '*'.)

*ShutDown

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

'ShutDown' gives you two options:

Emergency

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

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

Regular

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

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

Functions	
ShutDown...	

Cleanup Utilities	▶

Mass Authorization	⌘M
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Reservation Lists	⌘L
Print Setup / Pickup...	⌘U

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

- 1/ Printing Setup and Pickups for the following day.
- 2/ Printing Reservation Lists for the following day.

Other tasks may be specified by the system operator.

(*Note*: '*System Report' in this chapter has a list of all the tasks that the system can perform at 'ShutDown'.)

Cleanup Utilities	See the 'Cleanup Utilities' chapter.
*Mass Authorization	See the 'Mass Authorization' chapter.
*Authorization Lists	See the 'Authorization Lists' section in this chapter. (P 127)
*Off Line (Repair Tag)...	See the 'Off Line (Repair Tag)...' section in this chapter. (P 129)
*On Line...	See the 'On Line...' section in this chapter. (P 131)
*Resale	See the 'Resale' section in this chapter. (P 133)
Scheduler	See the 'Scheduler' section in this chapter. (P 137)
Override Info...	See the 'Override Info...' section in this chapter. (P 143)
Check Lists...	See the 'Check Lists...' section in this chapter. (P 145)
Inventory...	See the 'Inventory...' section in this chapter. (P 147)
Statistics...	See the 'Statistics...' section in this chapter. (P 149)
Authorization Stats...	See the 'Authorization Stats...' section in this chapter. (P 151)
*System Report...	See the 'System Report...' section in this chapter. (P 153)
*Usage Charts	See the 'Usage Charts' section in this chapter. (P 157)
Rental Invoices...	See the 'Rental Invoices...' section in this chapter. (P 159)

***Reservation Lists** See the 'Reservation Lists' section in this chapter. (P 163)

***Print Setup / Pickup...** See the 'Print Setup / Pickup...' section in this chapter. (P 165)

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Authorization Lists

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

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

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



Select Type

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



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

Print

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

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*Off Line (Repair Tag)

When a person returns a piece of equipment, you may be informed that it is damaged or does not work correctly. In that event the item must be taken 'Off Line' so that the technicians can repair it.

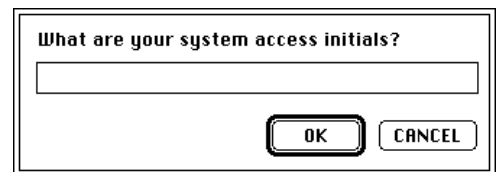
'Off Line (Repair Tag)...' is the option on the 'Functions' menu that should be used.

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

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

Enter Initials

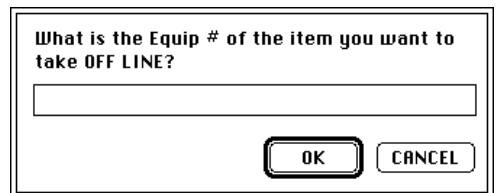
Enter your initials.



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

Enter equipment ID number

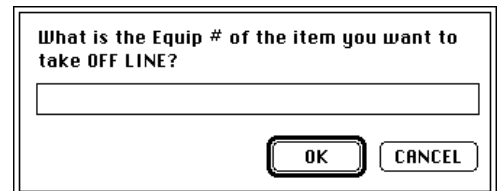
Enter the ID number of the piece of equipment that has the problem.



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

Enter number of days

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



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

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

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

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

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*On Line

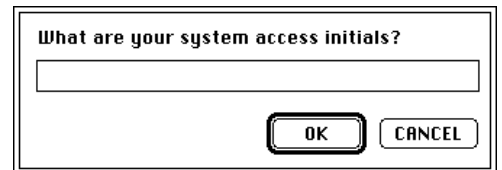
When an item that is currently 'Off Line' has been repaired, it has to be brought back 'On Line' so that people may reserve or check it out. 'On Line...' is the option on the 'Functions' menu that should be used.

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

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

Enter Initials

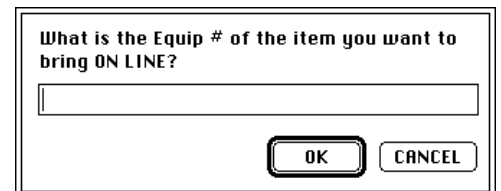
Enter your initials.



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

Enter equipment ID number

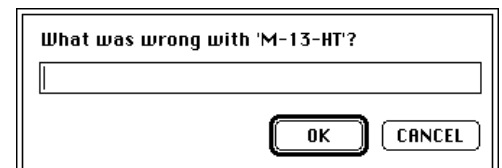
Enter the ID number of the piece of equipment that had the problem.



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

Enter reason

Enter a brief description of what was wrong with it.
(*Note:* You can just select 'OK' if there was no reason for it to be 'Off Line'.)



A dialog box with a title bar that reads "What was wrong with 'M-13-HT'?". Below the title bar is a single-line text input field. At the bottom right of the dialog box are two buttons: "OK" and "CANCEL".

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

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*Resale

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

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



Taking the options in order from right to left:

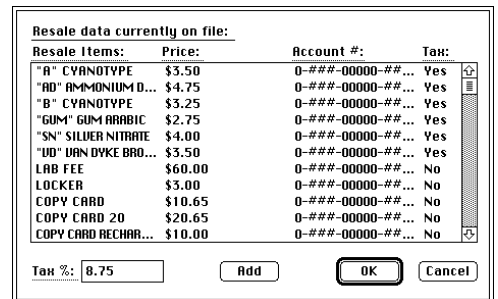
Done

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

Load

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

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



Resale Items:	Price:	Account #:	Tax:
"A" CVANOTYPE	\$3.50	0-###-00000-##...	Yes
"AD" AMMONIUM D...	\$4.75	0-###-00000-##...	Yes
"B" CVANOTYPE	\$3.25	0-###-00000-##...	Yes
"GUM" GUM ARABIC	\$2.75	0-###-00000-##...	Yes
"SN" SILVER NITRATE	\$4.00	0-###-00000-##...	Yes
"UD" UAN DYKE BRO...	\$3.50	0-###-00000-##...	Yes
LAB FEE	\$60.00	0-###-00000-##...	No
LOCKER	\$3.00	0-###-00000-##...	No
COPY CARD	\$10.65	0-###-00000-##...	No
COPY CARD 20	\$20.65	0-###-00000-##...	No
COPY CARD RECHAR...	\$10.00	0-###-00000-##...	No

Tax %: 8.75 Add OK Cancel

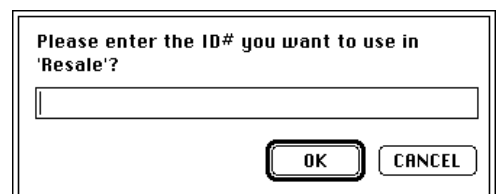
Clicking on an item will allow you edit or delete it. 'Add' can be used to add a new item, you will need to supply: what it is, how much will it cost, an account number and should it be taxed or not.

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

Sale

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

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



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

OK CANCEL

Report

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

items sold by number, account and price.

Files

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

'Sale' part II:

Actual Sale

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

(*Note:* All the button functions and names have changed with the exception of

The screenshot shows a software window titled "RESALE" with a menu bar containing "File", "Edit", "System Setup", "People", "Equipment", and "Functions". The window contains a resale card for "SAIC Reimbursement" with the following details:

SAIC Reimbursement	Date:	7/9/03
Name: Robertson, Maxwell	ID #:	0000000

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

Total:

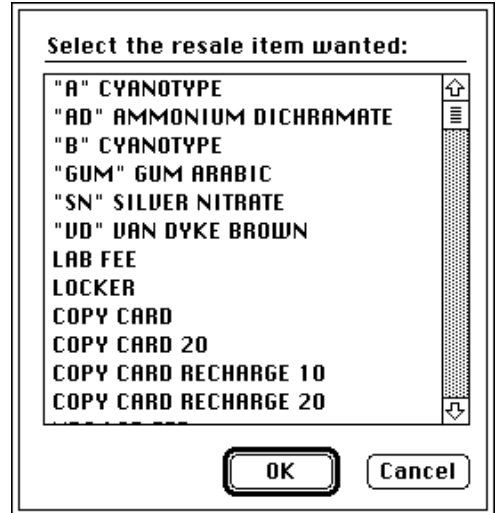
At the bottom of the window is a function key bar with the following buttons: F6 Clear, F7 Print, F9 Save, F10 Add Item, F11 Load, and F12 Cancel. A vertical "RESALE" label is positioned on the right side of the window.

'Load'. 'Cancel' now does the same as 'Done', it takes you back to either the 'Main Menu' or 'Unlaunched' screen.)

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

Add Item

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



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

Items:	# of:	Price (\$):	SubTotal:
"A" CYANOTYPE	2	\$3.50	\$7.61
"B" CYANOTYPE	2	\$3.25	\$7.07
"GUM" GUM ARABIC	1	\$2.75	\$2.99

Total: \$17.67

Print and Save

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

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

'Print' produces a receipt. This receipt, if printed to triple sheet NCR paper, can be used as follows:

- 1/ A copy is retained for the System Operators records.
- 2/ A copy is retained by the person purchasing the items.
- 3/ A copy is used to actually pay the bill at the bursars office. (If applicable.)

Clear

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

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Scheduler

There may be occasions that you need to reserve equipment for demonstrations or block out access to equipment so that it is available for a class or group, e.g. A color class may need to use ALL the color darkrooms when the class is in session. 'Scheduler' can be used to set up schedules for equipment and when one is in place, that equipment is blocked out and cannot be reserved for the scheduled times while the schedule remains in place. Schedules are permanent, until you remove them.

Done

Selecting 'Scheduler' will leave you at a blank screen with these two options. 'Done' will take you back to the previous screen from which you selected 'Scheduler'.



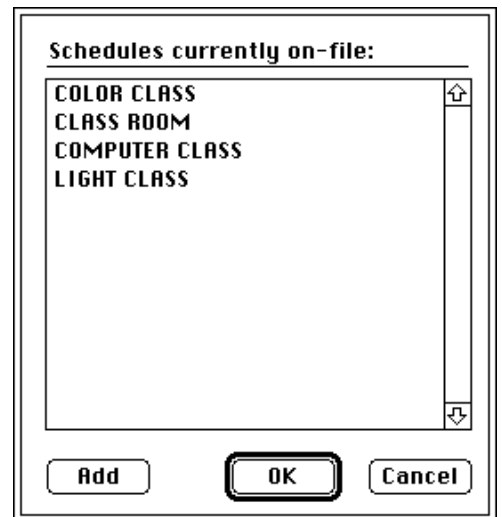
Sched

'Sched' gives you access to schedules on file or allows you to create new ones.

The list of names are schedules that already exist and the button 'Add' can be used to create new ones.

When you create a new schedule you must give it a name. It cannot be the name of an equipment type or the name of a schedule already on file.

(*Note:* You can delete a schedule by clicking on it while holding the 'Option' key down.)



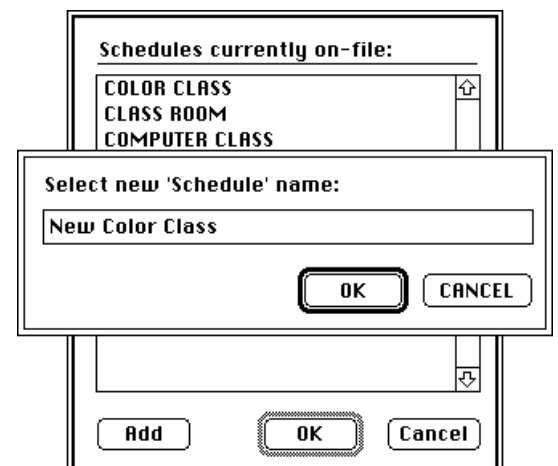
In this example a new schedule is made called 'New Color Class'.

Select 'Add'.

Type in 'New Color Class'.

Select 'OK'.

(*Note:* You will be informed of any problems at this time, e.g. duplicate name.)



You will then be displayed the scheduling card. An example of which is on the following page. From there you can create a schedule and assign equipment to the schedule.

An example of a blank schedule called 'New Color Class'.

Times:	Mon:	Tue:	Wed:	Thu:	Fri:	Sat:	Sun:
8:00 AM							
9:00 AM							
10:00 AM							
11:00 AM							
NOON							
1:00 PM							
2:00 PM							
3:00 PM							
4:00 PM							
5:00 PM							
6:00 PM							
7:00 PM							
8:00 PM							
9:00 PM							
10:00 PM							
11:00 PM							
OverNigh							

SCHEDULE

Schedule Name: **New Color Class** Excluded Dates: Equipment:

F10 Save F11 Sched F12 Done

Equipment:

To assigned equipment to the schedule you select the 'Equipment:' button.

This dialog will be displayed. The scrolling list on the left contains all the equipment types currently on file. Clicking on any item will move it to the column on the right. The column on the right contains all the equipment

Schedule: 'New Color Class'

Equip. Types:

- 2 1/4 CLOSE UP LENS
- BARCODE SCANNER
- BULK LOADER
- CAMERA 2 1/4
- CAMERA LARGE 4 H 5
- CAMERA LARGE MISC.
- CAMERA LENS 35MM
- CAMERA POLAROID
- CARTRIDGE DRIVE

Current Schedule Equip Types:

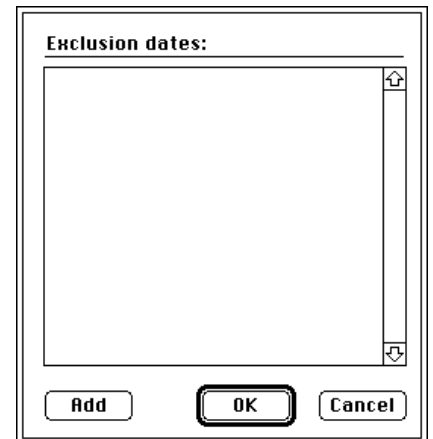
- COLOR DARKROOM

OK Cancel

that is going to be assigned to this schedule. If you want to remove an item from the schedule then you must hold the 'Option' key down while selecting the item. This will give you the option to delete the item. When you are done selecting the equipment, you can select 'OK' and that will add the items to the current schedule.

Excluded Dates:

'Excluded Dates:' displays this dialog. It allows you to create a list of dates when the schedule will NOT be in effect. This can be used in situations like 'Spring Break' when there would be no schedule needed but people may need access to the equipment or facilities. People then can make 'Reservations' or 'Check-outs' as normal during these dates.



Schedule Name:

'Schedule Name:' allows you to change the name of the schedule at anytime. It will bring up a dialog that will allow you to enter a new name. As before the name must not be an equipment type or the name of another schedule already on file.

You are now ready to create a calendar of times when the equipment will NOT be available for reservation. For this example we are going to make a schedule from 9:00 AM to 4:00 PM on Mondays. Currently the card looks like the example on the left.

Each raised area under the day, e.g. 'Mon:' and beside the times is a button. Clicking on one inverts it. You can click and drag to select multiple items. When you release the mouse you will be asked what you want to call the scheduled time slots. (See next page)

Times:	Mon:
8:00 AM	
9:00 AM	
10:00 AM	
11:00 AM	
NOON	
1:00 PM	
2:00 PM	
3:00 PM	
4:00 PM	
5:00 PM	

In this example the time slots were called 'Class'.

(*Note:* The schedule runs from 9:00 AM to 4:00 PM even though only the time slots up to 3:00 PM are selected. Each slot runs from the time it states to the next one, e.g. if 3:00 PM is selected, it blocks out the time from 3:00 PM to 4:00 PM.)

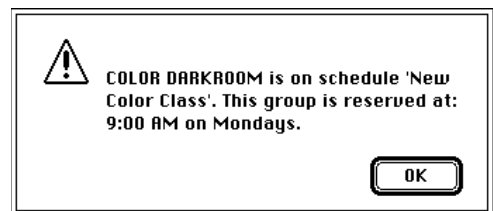
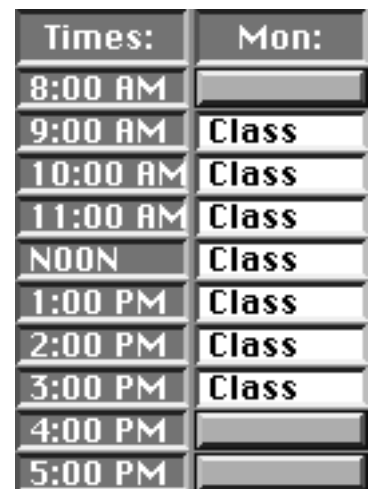
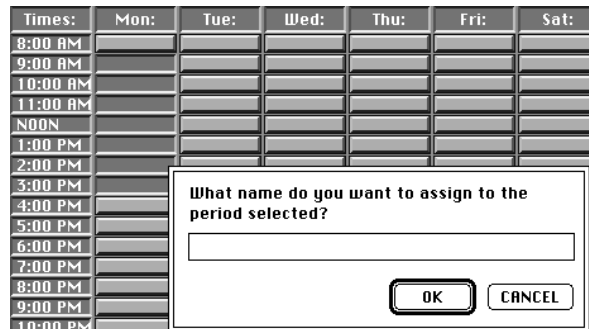
Each individual slot named 'Class' can be selected or the whole group can be selected by clicking and dragging to select all slots. When it is selected you will be given the option to delete the schedule slots or rename them.

You can now proceed to select other schedule times and add them to the card. The schedule you create is a template that is enforced on a weekly basis that is ongoing for the duration of time that the schedule is in place.

You must 'Save' the schedule when you have completed creating (or editing) it.

When someone tries to reserve a piece of equipment for times that clash with the schedule, they will be informed of the fact.

If someone checks out a piece equipment, then it cannot be returned at a time that clashes with a schedule, if the days are not the same.



Items on schedules CAN be checked out during the schedule time. In this example we have COLOR DARKROOM on a schedule from 9:00 AM - 4:00 PM. This means that you cannot reserve any off the items under this type during these times, since they are required for a 'CLASS' (the name given to the slots.). However the people who are IN the 'CLASS' need to be able to use this equipment, so they can check the equipment out like regular items.

(Note: There is NO override option for a reservation that clashes with a schedule. The only way to remove the effects of a schedule is to delete the schedule or delete the equipment type from the schedule.)

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Override Info...

'Override Info...' lists all the attempts that have been made to 'Override' certain functions. This can include attempts to access certain functions by using the password, e.g. 'Unlaunch'. It also notes all access attempts, successful or not to restricted functions, e.g. 'Mass Authorization'.

Selecting 'Override Info...' will display this dialog.

Override data currently on file:	
Inits / Password / When:	Who / What / Result:
*****	*****
CMP 5/11/03-7:46PM	RESERVATION-DAYS Michelle Fornof-0000001 5/11/03-8:00 PM<->5/12/03-9:30 AM
*****	*****
CMP 5/11/03-7:49PM	RESERVATION-FINE Lori Kimbrough-0000002 5/11/03-8:00 PM<->5/11/03-9:30 AM
*****	*****
CMP 5/11/03-8:06PM	RESERVATION-FINE Jonathan Londres-0000003

Column 1: Contains the data used, and the time access was made, to the controlled feature. (PASSWORD = correct password.)

Column 2: Contains what was being done, for who, what time and any equipment that was affected by the actions.

(*Note:* The data reported will vary from system to system. The data buffer is limited to 30k. If the buffer gets filled then the oldest records are thrown away and the newer data is added to the end. The dialog may take a few seconds to be displayed since it has to read the data from disk and then lay it out in the two (2) columns.)

This example illustrates two things:

'CMP' used his/her initials at 5/11/03-7:46PM to give Michelle Fornof a reservation that exceeded the time limit for the equipment requested. 'Reservation-Time' denotes this. This was an overnight reservation for something that had Same Day access. Check the dates and time of the Reservation data: 5/11/03-8:00 PM <-> 5/12/03-9:30 AM.

'CMP' used his/her initials at 5/11/03 - 7:49 PM to allow Lori Kimbrough to make a reservation even though she had a fine. 'Reservation-Fine' denotes this.

(*Note:* You can also have 'Reservation-Time,Fine' which combines both of the above.)

The system tracks other items but always displays the data as follows:

*****	*****
What was entered	Task attempted
Date and time of attempt	Where was task attempted from
	Result
	Equip # where applicable
*****	*****

Some Examples:

(Assume that the system password is 'ABC' and 'ZZZ' are valid initials.)

*****	*****
AAA	Attempt to: Unlaunch System
8/22/03-1:00 PM	Accessed From: Main Screen
	Wrong Password-Access Denied
*****	*****

*****	*****
PASSWORD	Attempt to: Unlaunch System
8/22/03-1:00 PM	Accessed From: Main Screen
	Correct Password-Access Granted
*****	*****

(*Note:* PASSWORD is used when the correct password is entered to prevent someone from reading what it is.)

*****	*****
ZZA	Attempt to V/D/P Fine for: 0000000
8/22/03-1:00 PM	Accessed From: Find ID Screen
	Wrong Initials-Access Denied
*****	*****

*****	*****
ZZZ	Attempt to V/D/P Fine for: 0000000
8/22/03-1:00 PM	Accessed From: Find ID Screen
	Correct Initials-Access Granted
*****	*****

(*Note:* In the last two (2) examples 'V/D/P' stands for 'View/Delete/Print'. Someone was trying to access a fine card for a person to either view, print or delete it.)

With the data supplied you can always track down when a task took place and you know the method of access, either initials or password. You can then use this to track down employees who may be operating the system incorrectly, even if they use initials belonging to someone else.

Check Lists...

'Check Lists' are printed forms that can be used to do a quick inventory of equipment and their accessories. The forms come in two types.

1/ If equipment has NO accessory items associated with it, then the data is laid out in two (2) sets of three (3) columns. The equipment numbers will be in column 1, 'OK' will be in column 2 and 'Problem' will be in column 3. This is duplicated twice per page, e.g.

Equip#:	OK	Problem	Equip#:	OK	Problem
M-1-TV					

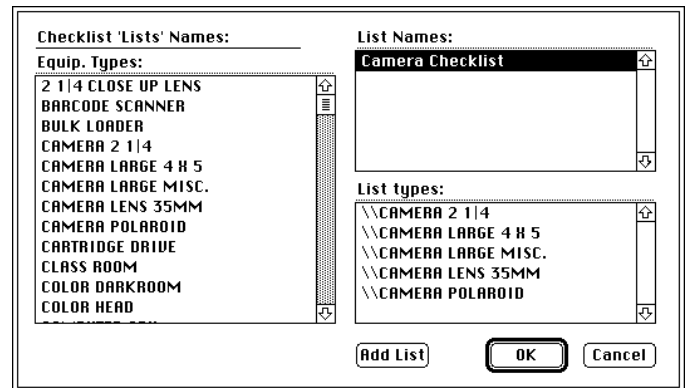
2/ If equipment has accessory items associated with it, then the data is laid out with one (1) column for the equipment numbers and then a number of columns matching the number of accessory items. One (1) accessory per column, up to a limit of ten (10). e.g.

Equip#:	Acc1	Acc2	Acc3
	Tripod	Lens Cap	Lens
M-1-TV			

(*Note:* These two layouts can be mixed and matched on a single page.)

You can create a 'Check List' report based on a specific equipment type, Category or the whole database. You can also make your own custom groups of items.

If you select 'Check Lists...' while holding the 'Option' key down, you will be given access to this dialog. The column on the left lists all the equipment types in the system. 'List Names:' lists all the names of the special lists that you have created. When you select a list name, the equipment types associated with the list will be displayed in the 'List Types:' field.



(*Note:* You can delete a type from a list, or a complete list by selecting it while you hold the 'Option' key down.)

'Add List' allows you to create a new list. The list name cannot be the name of an equipment type or the name of a list currently on file.

You assign an equipment type to a list by first selecting the appropriate list name, then clicking on each equipment type you want to be on the list.

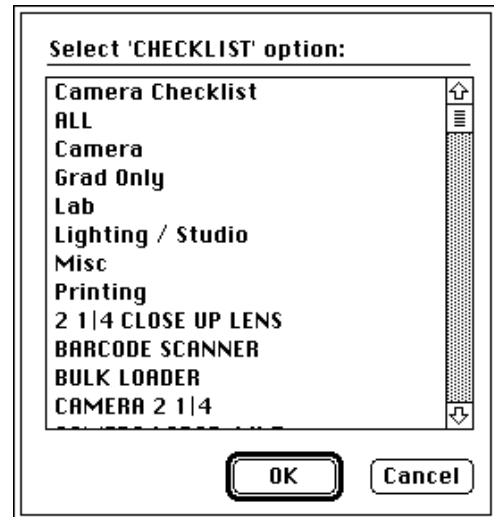
Selecting 'OK' will save the changes that you have made.

(*Note:* In this example the list 'Camera Checklist' was created and all camera items were added to it.)

Selecting 'Check Lists...' will display all equipment types currently in the system. It adds options for 'All' and any categories you have in the system. Lists that you have created will also be added to top of the list.

You select the option you require.

(*Note:* 'Camera Checklist' will be used in this example.)



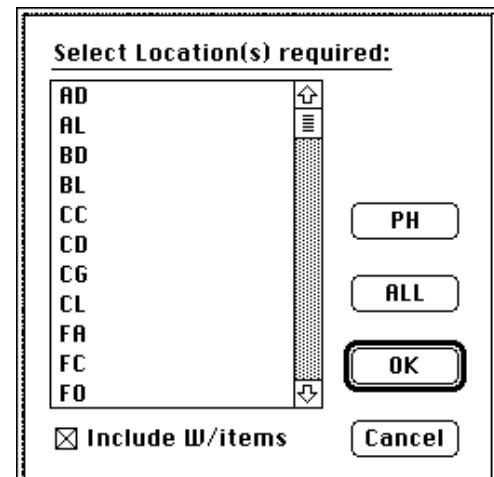
You will then be asked to select the locations you want to use as part of the inventory. The 'locations' are the two (2) letter codes that you assign to equipment in their records.

The button labelled 'PH' in this example is the main location of the demo system.

(*Note:* 'Include W/Items', if selected, means that you want to include as part of the 'Check List', items that are associated with other items, e.g. a Light Kit may come with three (3) lights but it is only the Light Kit that a person checks out. The lights are 'with' the Light Kit.)

(*Note:* You can select contiguous items by clicking and dragging while holding the 'Shift' key down.)

(*Note:* You can select non-contiguous items by clicking while holding the 'Command' key down.)



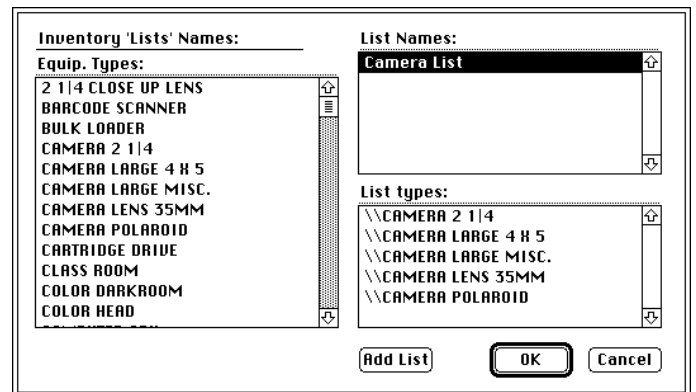
Selecting 'OK' will build the 'Check List' requested and then automatically print the data out, so you should ensure that the printer is on before using this option.

Inventory...

'Inventories' are printed forms that can be used to do a major inventory of equipment and their accessories.

You can create an 'Inventory' report based on a specific equipment type, Category or the whole database. You can also make your own custom groups of items.

If you select 'Inventory...' while holding the 'Option' key down, you will be given access to this dialog. The column on the left lists all the equipment types in the system. 'List Names:' lists all the names of the special lists that you have created. When you select a list name, the equipment types associated with the list will be displayed in the 'List Types:' field. (Note: You can delete a type from a list, or a complete list by selecting it while you hold the 'Option' key down.)



'Add List' allows you to create a new list. The list name cannot be the name of an equipment type or the name of a list currently on file.

You assign an equipment type to a list by first selecting the appropriate list name, then clicking on each equipment type you want to be on the list.

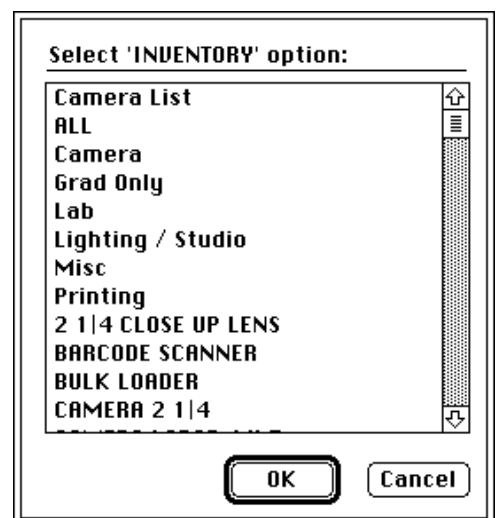
Selecting 'OK' will save the changes that you have made.

(Note: In this example the list 'Camera List' was created and all camera items were added to it.)

Selecting 'Inventory...' will display all equipment types currently in the system. It adds options for 'All' and any categories you have in the system. Lists that you have created will also be added to top of the list.

You select the option you require.

(Note: 'Camera List' will be used in this example.)



You will then be asked to select the locations you want to use as part of the inventory. The 'locations' are the two (2) letter codes that you assign to equipment in their records.

The button labelled 'PH' in this example is the main location of the demo system.

(*Note:* 'Include W/Items', if selected, means that you want to include as part of the 'Inventory', items that are associated with other items, e.g. a Light Kit may come with three (3) lights but it is only the Light Kit that a person checks out. The lights are 'with' the Light Kit.)

(*Note:* You can select contiguous items by clicking and dragging while holding the 'Shift' key down.)

(*Note:* You can select non-contiguous items by clicking while holding the 'Command' key down.)

Select Location(s) required:

AD	
AL	
BD	
BL	
CC	
CD	
CG	
CL	
FA	
FC	
FO	

Include W/items

PH
ALL
OK
Cancel

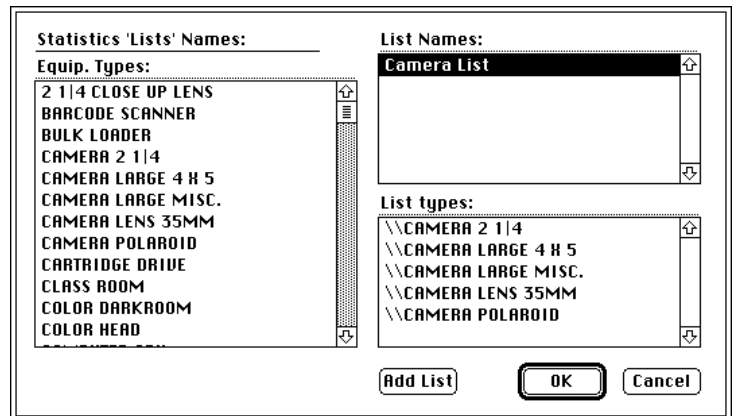
Selecting 'OK' will build the 'Inventory' requested and then automatically print the data out, so you should ensure that the printer is on before using this option.

Statistics...

'Statistics' are printed forms that display equipment and the usage that has taken place.

You can create a 'Statistics' report based on a specific equipment type, Category or the whole database. You can also make your own custom groups of items.

If you select 'Statistics...' while holding the 'Option' key down, you will be given access to this dialog. The column on the left lists all the equipment types in the system. 'List Names:' lists all the names of the special lists that you have created. When you select a list name, the



equipment types associated with the list will be displayed in the 'List Types:' field. (**Note:** You can delete a type from a list, or a complete list by selecting it while you hold the 'Option' key down.)

'Add List' allows you to create a new list. The list name cannot be the name of an equipment type or the name of a list currently on file.

You assign an equipment type to a list by first selecting the appropriate list name, then clicking on each equipment type you want to be on the list.

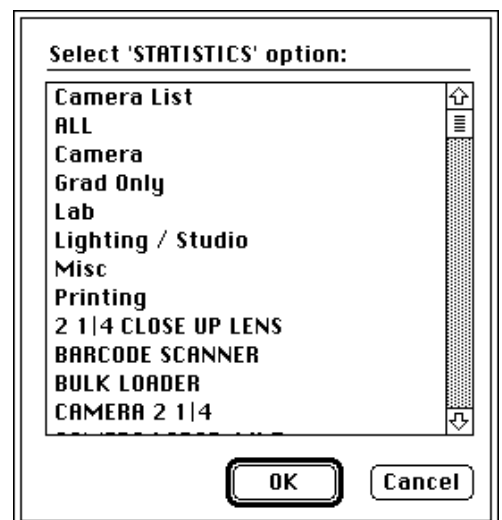
Selecting 'OK' will save the changes that you have made.

(**Note:** In this example the list 'Camera List' was created and all camera items were added to it.)

Selecting 'Statistics...' will display all equipment types currently in the system. It adds options for 'All' and any categories you have in the system. Lists that you have created will also be added to top of the list.

You select the option you require.

(**Note:** 'Camera List' will be used in this example.)



You will then be asked to select the locations you want to use as part of the inventory. The 'locations' are the two (2) letter codes that you assign to equipment in their records.

The button labelled 'PH' in this example is the main location of the demo system.

(*Note:* 'Include W/Items', if selected, means that you want to include as part of the 'Inventory', items that are associated with other items, e.g. a Light Kit may come with three (3) lights but it is only the Light Kit that a person checks out. The lights are 'with' the Light Kit.)

(*Note:* You can select contiguous items by clicking and dragging while holding the 'Shift' key down.)

(*Note:* You can select non-contiguous items by clicking while holding the 'Command' key down.)

Select Location(s) required:

AD	↑
AL	☰
BD	
BL	
CC	
CD	
CG	
CL	
FA	
FC	
FO	↓

Include W/items

The final decision you will need to make is if you want the statistics based on individual equipment numbers or have all the usage numbers for equipment numbers totalled together and displayed by equipment type (group).

(*Note:* The latter option saves a lot of paper when printing.)

Do you want the 'Statistics' by group type or individual Equip #?

Selecting 'OK' will build the 'Statistics' requested and then automatically print the data out, so you should ensure that the printer is on before using this option.

Authorization Stats...

MacCheckout allows you to authorize people for equipment. 'Authorization Stats...' allows you to get a statistical report on the number of people who are authorized for an item. You can create a report based on a specific equipment type, Category or the whole database. You can also make your own custom groups of items.

If you select 'Authorization Stats...' while holding the 'Option' key down, you will be given access to this dialog. The column on the left lists all the authorized equipment types in the system. 'List Names:' lists all the names of the special lists that you have created. When you select a list name, the equipment types associated with the list will be displayed in the 'List Types:' field.

(*Note:* You can delete a type from a list, or a complete list by selecting it while you hold the 'Option' key down.)

'Add List' allows you to create a new list. The list name cannot be the name of an equipment type or the name of a list currently on file.

You assign an equipment type to a list by first selecting the appropriate list name, then clicking on each authorized equipment type you want to be on the list.

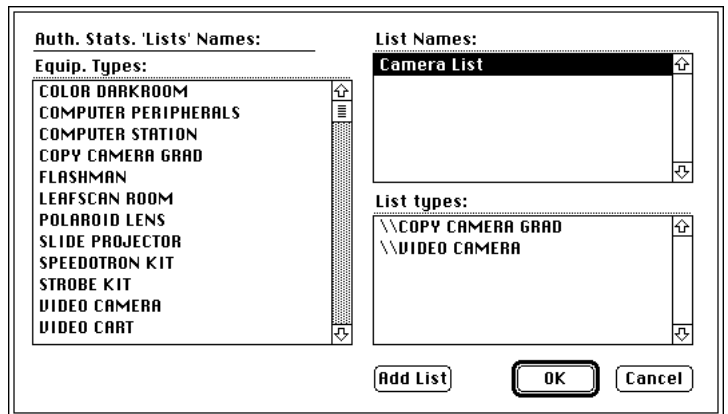
Selecting 'OK' will save the changes that you have made.

(*Note:* In this example the list 'Camera List' was created. 'Copy Camera Grad' and 'Video Camera' was added to it.)

Selecting 'Authorization Stats...' will display all authorized equipment types currently in the system. It adds options for 'All' and any categories you have in the system. Lists that you have created will also be added to top of the list.

You select the option you require.

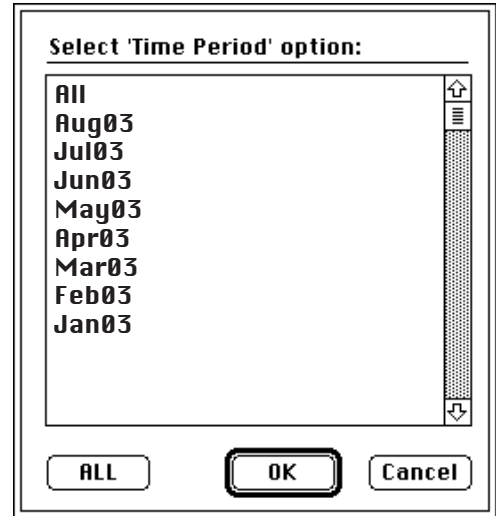
(*Note:* 'Camera List' will be used in this example.)



You then select the time period that you require the statistics for. Authorizations are only valid for one (1) year. So you are presented with a list of Months over the past year and also an option for 'ALL' time periods.

(*Note:* You can select contiguous items by clicking and dragging while holding the 'Shift' key down.)

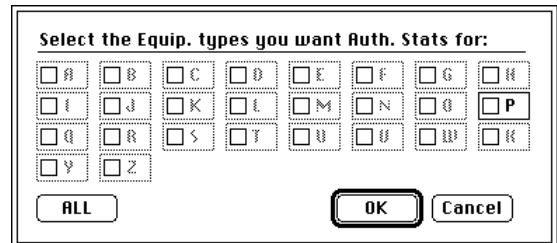
(*Note:* You can select non-contiguous items by clicking while holding the 'Command' key down.)



This example used 'All'.

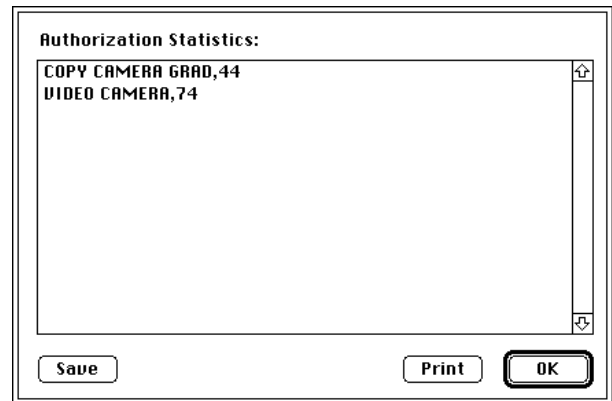
You then must select the equipment codes that you want to use while gathering statistics.

This example used 'All'.



The system will then query all the authorizations on file and see what matches the options selected.

With the demo system and these option selected, the result was: 44 people authorized for 'Copy Camera Grad' and 74 people authorized for 'Video Camera'.



You can then 'Print' or 'Save' the data displayed.

(*Note:* 'Save' will store the data in a standard text file which can be opened with any word processor.)

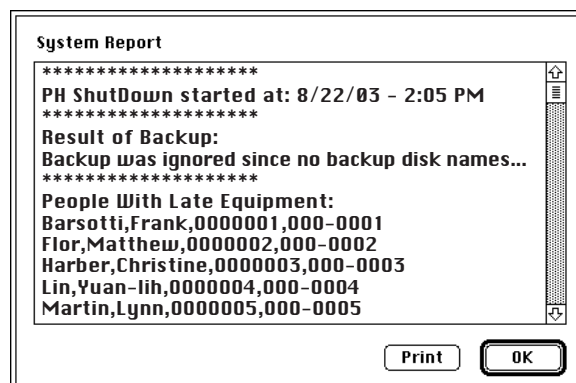
*System Report...

The system report is contained in a file called 'MacCheckout.SystemReport' which was created during the previous complete 'ShutDown'. This report lists any problems that the 'ShutDown' encountered, whether it was completed or not and lists all the people with late equipment, equipment brought back on line and equipment due to come on line tomorrow, amongst other things. The options reported will depend on the settings selected when the system was set up.

This report can be accessed at anytime by selecting 'System Report...'. It will display all the data currently in the report file in a dialog like this.

In this example the 'ShutDown' was started at 2:05 PM on 8/22/03. It did not back up the data since there was no back up drive selected. There were a number of people with late equipment.

(*Note:* The ID numbers and phone number were edited. You will see real number when you use the function.)



(*Note:* Not shown was the completion time of 2:12 PM. It took about seven (7) minutes to complete a full 'ShutDown' on the test system. It has about 4000 people and 1000 pieces of equipment and was running on a MacII FX.)

Print

'Print' is used to print out the report. If you print to triplicate NCR paper then a copy can go to a technician, who will check if equipment coming back on line today is really available, a copy can go to a chemist, if you use the 'Usage Chart' functions. He/She will be informed of what chemistry needs remixing. The last copy can stay at the machine for someone to start calling the people with late equipment.

If you turn on all the features in the system, then a complete 'ShutDown' will do the following tasks:

Back up the data currently on file

(*Note:* You must have at least one hard disk selected to be used for this function. Disks can be selected under 'Operating Information' in the 'System Setup' menu.)

Verify the equipment that is checked out

(*Note:* This cleans up any discrepancies that may occur between 'Agreement Forms' and 'Equipment Records'. If an item is checked out on an 'Agreement

Form' but not in an 'Equipment Record' then the 'Equipment Record' is updated to match the data. If the opposite is true then the data is removed from the 'Equipment Record' and a notation of 'Computer Returned' is added to the items last six (6) users. The System Report will note the item being 'Computer Returned' so that you can track down what when wrong.)

Delete old reservations

Fine Transfer (see the 'Multiple Locations' chapter)

Create a new Fine Transfer file (see the 'Multiple Locations' chapter)

Find Equipment that is coming back on line today

(*Note*: Items coming back on line today are put back on line and added to a list on the System Report.)

Find Equipment that is coming back on line tomorrow

(*Note*: Items coming back on line tomorrow are added to a list on the System Report.)

Find People with late equipment

(*Note*: People with late equipment are added to a list on the System Report.)

Find People with bans that expire tomorrow

(*Note*: People with bans expiring are added to a list on the System Report.)

Find People with bans that have expired

(*Note*: People with expired bans are added to a list on the System Report and their bans are removed.)

Check the Usage Charts for expired Chemistry

(*Note*: Any expired chemistry is added to a list on the System Report.)

'End of Active Period' cleanup

(*Note*: If the option is enabled and today is the 'End of Active Period' date, then all the 'Cleanup Utilities' are automatically executed and the results added to the System Report.)

Warning:

When you select 'ShutDown' it checks what the time is. If the time is after mid-day then it assumes that you are doing the final 'ShutDown' for today. It assumes that the next time you are going to use the system is tomorrow. So it assumes that

the date to be used for the 'today' or 'late' calculations is when you open tomorrow morning. This can cause some confusion if you do a 'ShutDown' during the afternoon and then restart the system. The 'ShutDown' routine will have already done the work that it would have done last thing that night and reported the results back to you a day early. So you may be informed that someone has late equipment but it is not actually late yet. Any 'ShutDown' before mid-day will just repeat the functions already run the night before.

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*Usage Charts

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

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

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

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



These options are as follows from right to left:

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

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Rental Invoices

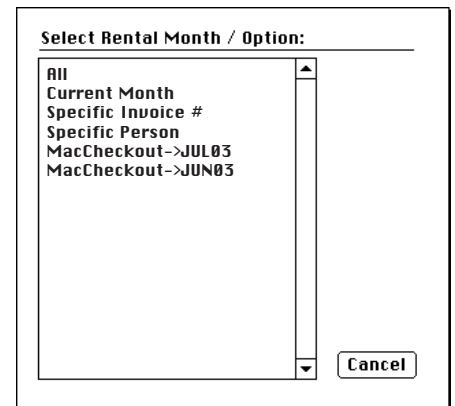
The system can be used under situations where external people are allowed to rent equipment. This would involve the generation of an invoice for billing purposes. If you decide to turn ON 'Rental Invoices' on the 'Rental Setup' submenu of the 'System Setup' menu AND turn on the option to 'Store invoices online' which is under 'Rental System Info...' on the 'Rental Setup' submenu of the 'System Setup' menu, then the 'Rental Invoices...' option under the 'Functions' menu will be enabled. 'Rental System Info...' also lets you set up the starting number for all invoices. The formats supported are: any number, e.g. '111111', any letters followed by any numbers, e.g. 'AA111111', any numbers followed by any letters, e.g. '111111AA' and any letters, followed by numbers and then any letters, e.g. 'AA111111AA'. Only the number part gets incremented to ensure no duplicate invoice numbers.

Rental Invoices

Selecting 'Rental Invoices...' will present you with this dialog. This will give you a default listing of:

All
Current Month
Specific Invoice #
Specific Person

(*Note:* These items are always present and cannot be removed.)

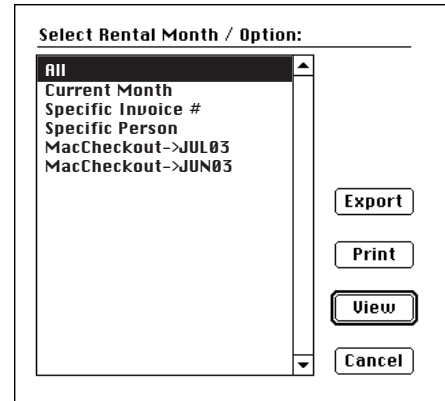


There will also be a listing for each month that the rental system has valid invoices for. They will be listed under 'MacCheckout->' and the first three (3) letters of the month and the last two (2) digits of the year, e.g. 'MacCheckout->JUN03'.

The month based entries are actually folders that are stored inside the 'MacCheckout->Invoices' folder that has been created inside the 'MacCheckout' folder. These folders in turn, contain all the individual invoices created to date. This allows for billing by month as well as individually.

ALL Selecting 'All', allows you to process all invoices in the system. It activates the buttons 'Export', 'Print', 'View' and 'Cancel'.

Cancel 'Cancel' in any dialog aborts the current task. In this case, it aborts the function completely. In any of the sub dialogs, it will close it and return you to this one.



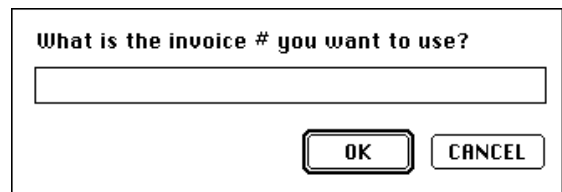
View 'View' allows you to view the invoices.

Print 'Print' allows you to print the invoices.

Export 'Export' allows you to export the invoices to a text file. You will be asked to name the file and choose a destination folder on the hard disk, before the export function writes the data out to the disk.

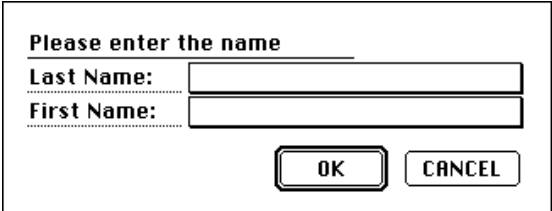
Current Month When you select 'Current Month', it automatically processes the invoices for the actual calendar month you are in and presents a list that you can select from. The options 'All' and 'Specific Person' will be added to the list. 'Specific Person' will then allow you to enter a person's name and search the list for invoices for that person.
(*Note:* The month selected will be the title for the dialog box.)

Specific Invoice # 'Specific Invoice #' allows you to search for an actual invoice and then 'Export', 'Print' or 'View' it.



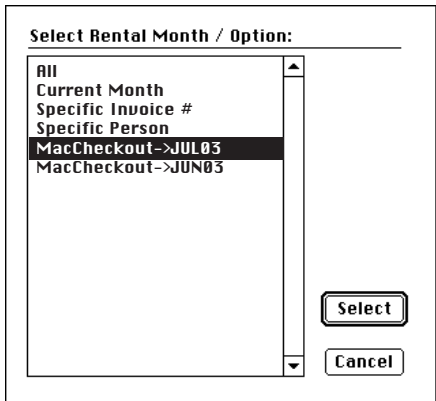
Specific Person

'Specific Person' displays this dialog. It allows you to enter a persons name. All invoices are then searched and you will be presented with a list of invoice numbers that are for that person. The invoices can then be processed. You will have the options of 'ALL' and the invoices in the list, and when anything is selected, 'Export', 'Print' or 'View' will be available.



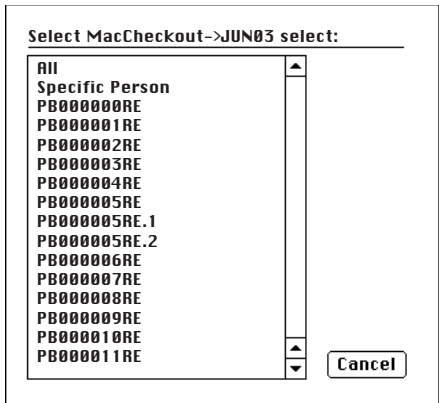
MacCheckout->#####

Selecting one of the options starting with 'MacCheckout->' will display a select button, as shown here.



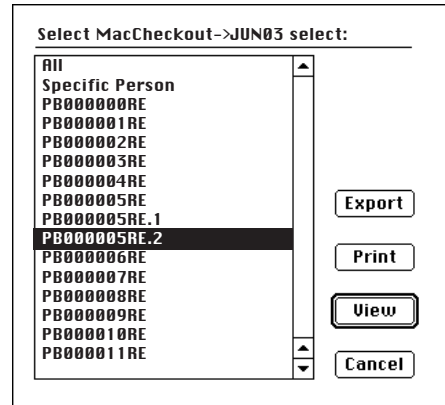
Using the 'Select' button will then display all the invoices listed under that particular month. The options 'All' and 'Specific Person' will be added to the list. 'Specific Person' will then allow you to enter a persons name and search the list for invoices for that person.

(*Note:* The month selected will be the title for the dialog box.)

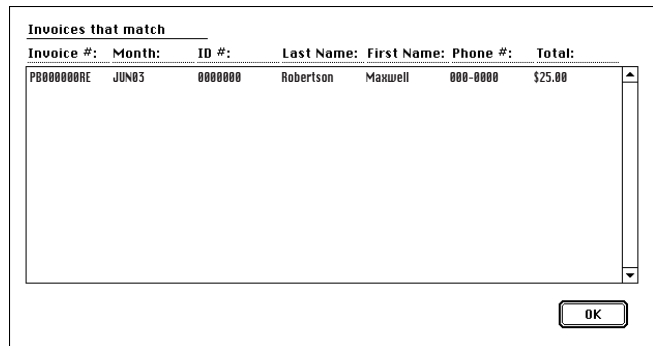


Also shown here are two invoices that have the same name / number but have '.1' and '.2' after it. This means that the particular 'Agreement Form' that generated the invoice has been edited or modified twice. The invoice with the highest ".#" will be the most recent. The others are kept on file to prevent fraud and allow to keep a complete paper trail of all billings.

Selecting one of the invoices will give you access to the same basic functions of 'Export', 'Print' and 'View'. This is also a sub dialog, so if you select 'Cancel', then you will be taken back to the previous basic default dialog listing.



Selecting 'View' will give you a basic listing of the main parts of the invoice including: who, when and how much.



*Reservation Lists

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

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



Select Type

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

Type:	16MM PROJECTOR PAGEANT				Date:	7/10/03
Date/Time:	F-10-FP	M-21-FP	M-24-FP	M-25-FP	M-28-FP	
8:00 AM						
9:00 AM	0000000	0000000	0000000			
10:00 A	0000000	0000000	0000000			
11:00 A	0000000	0000000	0000000			
NOON	0000000	0000000	0000000			
1:00 PM	0000000	0000000	0000000			
2:00 PM	0000000	0000000	0000000			
3:00 PM	0000000	0000000	0000000			
4:00 PM	0000000	0000000	0000000			
5:00 PM						
6:00 PM						
7:00 PM						
8:00 PM						
9:00 PM						
10:00 P						
11:00 P						
OverNig						

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

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



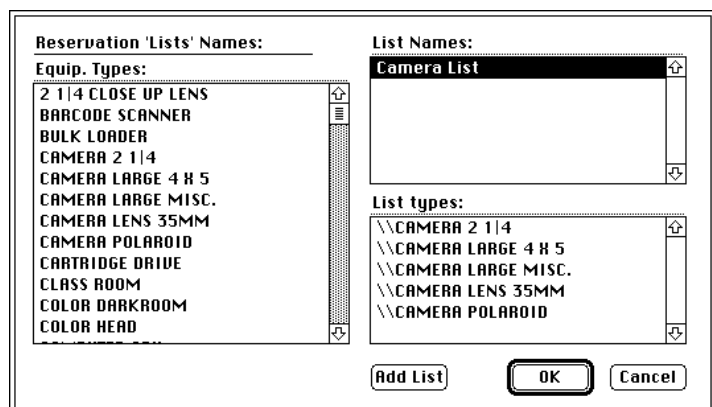
Print

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

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

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

(*Note:* 'Reservation Lists' has the same option that all the 'Check Lists', 'Inventory' and 'Statistics' functions have. If you select 'Reservation Lists' while holding down the 'Option' Key, you will be given access to this dialog. From here you will be able to create custom lists of equipment. All the same rules apply here also. These custom lists can be printed out also.)



*Print Setup / Pickup...

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

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

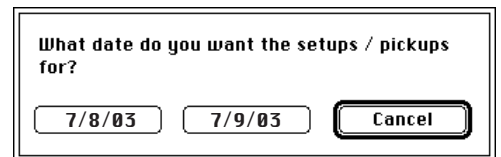
It takes three (3) steps for you to print this data:

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

Select Date

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

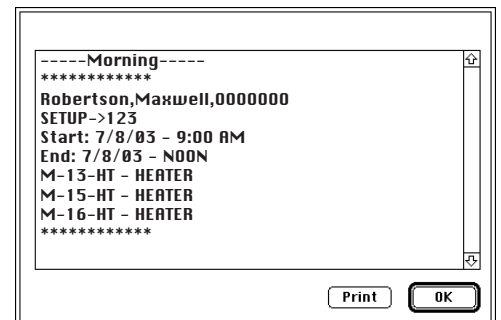
(*Note:* If you hold down the 'Option' key while selecting the item from the menu bar, you will be presented with a dialog that will allow any date to be entered. The date must be valid and current. You cannot print Setups and Pickups for a date that has past.)



Select Print

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

Select 'Print' to print the data.



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