

leihs user guide

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1 User Guide Warning



Warning

This user guide is a work in progress. Officially, leihs does not have user documentation yet, this is just a collection of copy/pasted information we assembled over the years.

If you want to help the project and write a user guide for leihs, see the section "About this Document".

2 Introduction

leihs is web-based inventory handling and resource booking system. It allows users to view available equipment and place reservations through the frontend. Inventory managers and sysadmins use the backend to handle incoming reservations and manage items in the inventory.

This guide shows you how to use leihs. You don't need to install anything on your own machine to use leihs, all you need is a web browser.

3 Definitions

Below references to defined terms are capitalized and in quotes, as f.ex. "Manager".

Access Rights see "User"

Contract is produced as soon as an "Order" is acknowledged by a "Manager"

Customer a "User" that has the right to borrow "Items". See also "User"

Inventory Pool TODO

Item a thing that can be borrowed. An Items is of a certain "Model". An "Inventory Pool" can have several "Lenovo T40" laptops. Thus "Lenovo T40" would be the "Model" of which the "Inventory Pool" could have three "Items" labeled "T40-1", "T40-2", and "T40-3"

Manager a "User" that has the right to lend "Items".

Model see "Item"

Order TODO

User can be a Customer and/or Manager or a Administrator. These "Access Rights" are given per "Inventory Pool" or in the case of the Administrator for the whole of leihs.

4 Availability

A central element of leihs is management of availabilities of models i.e. the question:

Is some model available to be lent out from a certain day on to some end date? Or are all available items of that model already reserved for other customers?

When lending out items, the inventory pool manager needs to be aware of the fact, that if he assigns an item to a contract that is in the future, then that item becomes immediately unavailable.

This is based on the assumption, that if an item that is reserved in the future would be lent out before that date, then there would be a risk, that the anterior borrower would not return the item, which would break the promise previously given to the posterior borrower that he effectively will get the reserved item. This means that leihs gives precedence to fulfilling promises over optimal allocation utilization.

5 Management of the Borrowing Workflow

When handing over items to the customer, leihs will by default produce a PDF contract and display it to the inventory pool manager that is executing the transaction, at which moment the manager can print out the PDF contract.

He can now give the contract to the customer for signature or proceed with other offline (that is not part of leihs itself) steps in the borrowing process.

If the inventory pool manager does not wish to see contracts when he hands over items, then he can configure that. There is a checkbox "Print contracts" in Backend→Administration→Inventory Pool→bottom of the page.

5.1 User levels and roles

leihs decides what it lets users do based on their role and level. Each role or level is specific to an inventory pool, the only exception is the admin role, which covers the whole system.

There are three available roles: customer, manager and admin.

5.1.1 Customer

Customers may only use the frontend and submit orders.

5.1.2 Manager level 1

Think of this manager as the "lending and borrowing manager".

- May only use the "Booking" section of the backend and parts of the "Administration" section
- May acknowledge orders for their inventory pool
- May hand over orders and create contracts
- May take back orders

5.1.3 Manager level 2

Think of this manager as a "junior manager".

- Everything that a manager at level 1 can do, plus:
- May assign levels and permissions (within their own inventory pool) up to and including level 2
- May create new models
- May create new items that are not inventory relevant, and the manager may not change this setting
 - These items have "Responsible department" set to their own inventory pool and the manager may not change this setting

5.1.4 Manager level 3

Think of this manager as a "senior manager".

- Everything that levels 1 and 2 can do, plus:
 - Sees the "Inventory" section of leihs
 - Has no restrictions on editing items
-

- May create things that are inventory relevant
- May assign items to any inventory pool as "Responsible department"
- Using these functions, managers of level 3 can purchase items using their own inventory pool, but assign responsibility for the items to other inventory pools, so those other pools can manage their borrowing and lending independently
- May manage categories

5.1.5 Admin

- May manage users and assign permissions
- May manage inventory pools
- May manage groups

6 Groups

If you immediately want to try out the "Groups" feature, then go to the backend of one of your inventory pools, then either to "Own models" or "Models" (anywhere you have models, really). Now edit some model. In the leftmost tab shows you the "Availability" of that model where you can choose to "Change group quantities".

Let's explain the feature using an example. Let's we have the following situation:

- there are 40 cameras of type Canon XYZ
- 20 should be borrowable by everybody (through the "General Group", which is being managed automatically by the system)
- 10 should be available to users in "Photography students" "Group" only
- and 10 should be in the "Group" "Web and videocasting students"

Let's say you have 150 photography students and 3000 students in total. This makes sure that the photography students have a disproportionate number of cameras available to them, so they're more likely to get one when they do need to book a camera.

Or you can use it to manage certification situations. One could make certain expensive cameras are only borrowable by people who took a course on how to correctly handle that camera. So we could create a "Group" "Certified for Big Camera" and add *all* those cameras to that group. And then add users one by one, as they show up with a proof that they took the course.

7 About this Document

This document was written in Asciidoc: <http://www.methods.co.nz/asciidoc/>

It can be generated from the user_guide.txt sources by cloning the git repository from <http://github.com/psy-q/leihs> and issuing:

```
$ rake release:gendoc
```

from within the leihs directory.

7.1 Contributors

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8 TODO: More Sections Go Here

TODO
