

University of Sheffield

COM3420 Software Hut



School of Education Loan System

User Manual

Created by:

Samuel Broughton

Siva Chokkapu

Ximeng Chang

Yujia Cheng

Department of Computer Science

May 13, 2018

Contents

1	Part I: The User	2
1.1	Logging In / Out	2
1.2	Navigation Bar	2
1.3	Home Page	2
1.3.1	Category Pages	2
1.4	Loan History Page	3
1.5	Request Basket Page	3
2	Part 2: Admin Manual	4
2.1	Logging In / out	4
2.2	Navigation Bar	4
2.3	Summary Page	4
2.4	Inventory page	5
2.4.1	Produce Inventory List	5
2.4.2	Add New Item	6
2.4.3	Inventory Items	6
2.4.4	Inventory Item Devices - Clicking View	6
2.4.4.1	Back	7
2.4.4.2	Add New Device	7
2.4.4.3	Item Devices	7
2.5	Loan Approval Page	8
2.6	Research Projects Page	9
2.6.1	View Research Project	9
2.6.1.1	End Research Project	9
2.6.1.2	Research Project Devices	9
2.6.1.3	Research Project Form	10
2.7	Loans History	10
2.8	Disposed Page	10
3	Part III: Help	11
3.1	Where To Go For Help	11

1 Part I: The User

1.1 Logging In / Out

To log into the University of Sheffield Education Loans System, a user must be the following:

- A student or member of staff at the University of Sheffield
- A part of the School Of Education department

Note: *A user will not be able to access the system if the above is not met.*

If it is decided a user should be able to access the Loans System, or have their access revoked, contact epiGenisis for support.

When logged in, a user can log out via clicking their email in the top left corner of the screen, and then selecting 'Log out'.

1.2 Navigation Bar

Below the University of Sheffield logo and the title *School of Education Loans System*, there is a black navigation bar. The bar has 3 pages which can be accessed from it:

- Home - where the user can view items
- Loan History - where the user can view their current and previous loans
- Request Basket - where the user can gather a collection of loans

1.3 Home Page

In this section the user will be able to view 6 different categories, each of which items. The categories are as follows:

- Departmental Devices
- Laptops
- Tablets
- Cameras & Recorders
- Audio Devices
- Misc. Devices

1.3.1 Category Pages

Each different category has the same page format. Items created by the admin will be shown inside these categories. For each Item the user will be able to see the name of the item and the time period in which it can be loaned for. The user will also have 2 options per item, to *Add to request basket* or to *Click to request device*.

Adding an item to the request basket will make that item appear in the users request basket for later use. Clicking to request a device will take a user to a form in which they will be forced to input the date in which they intend to return the device by; the quantity of the device they require and the reason for why they need to make the loan.

1.4 Loan History Page

Here there will be two tables which show the current ongoing loans to the user and the previous loans that the user has had, respectively. Within the table showing the ongoing loans of the user, they are provided with information regarding the item's name, model type, category, request date and return date. The previous loans table provides all this information as well however, it will also let the user know if they returned the device late or not.

1.5 Request Basket Page

If no item has been *add[ed]* to *request basket*, the page will simply tell the user so. However, if the user has added items, the page will have input fields for the following information needed from each separate item request:

- Return Date of item
- Quantity of item
- Reason for loan request

When the fields for a specific item have been input, the user should click *Save* to make sure has been saved.

Note: Clicking *Save* for one item request will not save information for others.

If the user no longer wants this item in their basket, they should simply click *Remove* on that specific item.

Once the User is happy with all the items and input information in their request basket, they can request all the loans at once by clicking *Request all items*. This will take the user to a confirmation page, so that they can check all their information is accurate before clicking *Submit Request*.

Note: If a user tries to click *Request all items* without filling the necessary input fields for all items in their request basket, the button click will not work. Instead a prompt will appear, notifying them that all fields have not been filled in.

2 Part 2: Admin Manual

2.1 Logging In / out

To log into the University of Sheffield Education Loans System as an admin, you must be the following:

- A student or member of staff at the University of Sheffield
- A part of the School Of Education department
- An administrator or the system

Note: *An admin will not be able to access the system if the above is not met.*

If it is decided a user should be given administrator privileges or should be revoked of these privileges, contact epiGenesis for support.

When logged in, an admin can log out via clicking their email in the top left corner of the screen, and then selecting 'Log out'. An admin also has access to this manual; by clicking the link User Manual (pdf) in the very top right of the screen, a pdf of this manual will be opened.

2.2 Navigation Bar

Below the University of Sheffield logo and the title *School of Education Loans System*, there is a black navigation bar. The bar has 6 pages which can be accessed from it:

- Summary - where the admin can view the current loans
- Inventory - where the admin can view all the current items and devices
- Loan Approval - where the admin can accept or reject loan requests
- Research Projects - where the admin can view any ongoing research projects
- Loans History - where the admin can view the previous loans made on the system
- Disposed - where the admin can view any devices they have disposed of

2.3 Summary Page

All loans that have been accepted or made by the admin and that are currently on loan to someone, will be shown here. For each device that is on loan there is a row containing the following columns:

- Id - the loan id. This can be used to see if other devices are under the same loan
- Item - the item name of the device (e.g. 15" Laptop)
- Model - the model of the device (e.g. Macbook pro)
- Loaned to - the name of the person loaning the device
- Serial no. - the serial number of the device (or equipment number if there is no serial number)

- Status - if the loan should have been returned, this column will read OVERDUE. Otherwise it is blank ("-")
- Due date - the date the device is to be returned by
- Edit due date - takes you to a form where by you can change the return date of the device. Upon completion of this form the user will be notified.
- Item returned? - click this button to complete the loan when this device has been returned
- Personal email - click this button to directly contact the loanee

If the status of a loan reads OVERDUE, the row will have red writing to easily identify this. Every day at 9am that the item has not been returned, the user will receive an automated email informing them that their loan for this device is overdue and that they must return it.

Once the admin completes a loan by clicking "Item returned?", the user will receive an automated email informing them they have returned this device.

2.4 Inventory page

All the items in which devices belong to are listed on this page.

2.4.1 Produce Inventory List

By clicking the link "Produce Inventory List", a download file (.csv) of the entire inventory will begin. Opening the file you will find the following column headers for each device in the system:

- id - the id number of the device
- model_type - the model of the device (e.g. Macbook pro)
- serial_equipment_number - the serial number of the device (or equipment number if there is no serial number)
- purchase_price - the purchase price of the device
- purchase_date - the purchase date of the device
- item_location - the location of the device (if the admin has specified)
- is_research_project - if the device is on a research project this will read "true" otherwise "false"
- inventory_id - to which item the device belongs to
- disposed_of - if the device has been disposed of this will read "true" otherwise "false"
- loan_token - if this reads "not_loaned", the device is currently not on loan to anyone, otherwise it will contain a collection of random letters and numbers. This is used to link it to its loan information.

- `in_use` - if the device is currently on loan to a user, this will read "true", otherwise "false"
- `research_project_id` - the id of the research project the device is associated with. If it is not on a research project this will be 1.

2.4.2 Add New Item

By clicking the link "Add New Item", you will be taken to a form which has the following fields:

* required fields

- *Item name - the name in which devices are associated to. The name in which users will see whilst looking to request a loan (e.g. 15" Laptop)
- Category - the name of the category the devices will belong to (e.g. Laptops)
- Loan time - 3 options are available: Short, Medium and Long

Upon filling in these fields, clicking "Save Item" will create the item. If required fields were not filled in correctly, the item will not save.

If the item is not created for any other reason, please contact epiGenesis.

2.4.3 Inventory Items

Below buttons "Produce Inventory List" and "Add New Item", there is a table where by each row represents an item. The columns show information for each specific item:

- Item - the item name of the device (e.g. 15" Laptop)
- Category - the category in which this item belongs (e.g. Laptops)
- No. in stock/Total no. - the number of devices an item has in stock at the minute / the number of devices there are in total (regardless of if it is on loan or part of a research project)
- Loan time - either Short, Medium or Long depending on what was selected
- View - a button that when clicked, takes you to all the devices that are associated with this item. Talked more about in 2.4.4.
- Edit - a button that when clicked will take you to the same form talked about in section 2.4.2. However, when "Save Item" is clicked, the current item will update.
- Destroy - a button that when clicked, will destroy this item and all devices associated with it. WARNING this deletes all these devices from the system completely.

2.4.4 Inventory Item Devices - Clicking View

Upon clicking the view button for a particular item, you will be taken to a page including all the devices associated with this item. There is still information about the item you are viewing below the items name just under the nav bar.

2.4.4.1 Back

Clicking this link at either the right side of the page or the bottom left will take you back to the Inventory page.

2.4.4.2 Add New Device

By clicking the link Add New Device, you will be taken to a form with the relevant fields to fill out:

*** required fields**

- *Model name - the name of the model of the device (e.g. Macbook pro)
- *Device serial or equipment number - the serial number of the device. If this is not possible, the equipment number of the device.
- Purchase price of device - how much the device cost upon purchase
- *Purchase date of device - the date in which the device was purchased
- Location of device - where the device is located
- Is the device in use/being loaned - tick the box if this is so
 - User's name - the name of the person the device is being loaned to
 - *User's email - the University of Sheffield email of the person the device is being loaned to
 - Return date - the date the item is to be returned by
- Is this device a part of a research project? - tick the box if this is so
 - Researcher's name - the name of the researcher the device belongs to
 - Researcher's email - the University of Sheffield email of the researcher the device belongs to

Upon filling in these fields, clicking "Save Device" will create the device. If required fields were not filled in correctly, the item will not save.

If the item is not created for any other reason or there are any other problems, please contact epiGenesis.

2.4.4.3 Item Devices

Below buttons "Back" and "Add New Device", there is a table where by each row represents a device. The columns show information for each specific device:

- Model - the model of the device (e.g. Macbook pro)
- Serial/Eq No. - the serial number of the device (or equipment number if there is no serial number)
- User - the name of the person to which the device is loaned to or part of a research project for. If this is neither, the column will be blank ("-").

- Email - the University of Sheffield email of the person to which the device is loaned to or part of a research project for. If this is neither, the column will be blank ("-").
- Purchase Price - the purchase price of the device
- Purchase Date - the purchase date of the device
- Location - the location the device can be found
- RP - if the device is on a research project, there will be a button with a tick that will take you to that project on click
- Edit - a button that when clicked will take you to the same form talked about in section 2.4.4.2. However, when "Save Device" is clicked, the current device will update.
- Dispose - a button that when clicked will dispose of this device, only if the device is not loaned or on a project

2.5 Loan Approval Page

This page shows you all the loan requests that have been made. Enabling the admin to make the decision on whether a device should be loaned to a user or not. Each row in the table constitutes a loan request for 1 specific type of item. The columns show information about each of these loan requests:

- Id - this is the loan id of the loan request
- Item - this is the name of item the user is requesting
- Name - the name of the user making the request
- Email - the email of the user making the request
- Request date - the date in which the loan was requested
- Requested due date - the date in which the user has requested the item to be returned by
- No. in stock/total no. - this shows whether there is enough devices of this item in stock at the moment
- Quantity Request - the number of devices of this type of item the user has requested
- Reason - a hover button which shows the reason for why the user wants to request this item
- Edit due date - takes you to a form where by you can change the return date of the device. Upon completion of this form the user will be notified.
- Accept - a button when clicked will accept the loan, allocating a device(s) of the item type requested to the user. A confirmation email of this is sent to the user
- Reject - a button when clicked will reject the loan, sending an automated email as to the rejection of the request

2.6 Research Projects Page

The Research Projects page shows a view of all the different ongoing projects. Each row in the table constitutes of a project whilst the columns provide the following information:

- Researcher - the name of the researcher
- Email - the email of the researcher
- No. of devices - the number of devices currently being used in the project
- End of Project - the date in which the research project is scheduled to end
- View - a button when clicked enables you to view the devices and information associated with a specific project. Talked more about in 2.6.1

2.6.1 View Research Project

Information about the current project you are viewing is found to the left under the navigation bar, telling you who the project researcher is; the end date of the project and the email of the researcher.

2.6.1.1 End Research Project

This link, above the table to the right, when clicked will end the research project. This means that all devices associated with the project will become available in the inventory once again and also, the research project will be deleted forever.

There is no automation for ending a research project, only the admin can end it regardless of what the end project date is.

2.6.1.2 Research Project Devices

The table shown when viewing a research project contains all the devices currently on the project. Each row constitutes a device whilst the columns contain the following information:

- Item name - the name of the item the device is associated with (e.g. 15" Laptop)
- Model - the model of the device (e.g. Macbook pro)
- Serial No. - the serial number of the device (or equipment number if there is no serial number)
- Purchase price - the purchase price of the device
- Purchase date - the purchase date of the device

2.6.1.3 Research Project Form

Underneath the Research Project Devices table there is a form which can be used to edit any information about the project.

Below this form is a back button which will take you back to the Research Projects page.

2.7 Loans History

This page presents information about all the loans that have been completed i.e. the device has been returned. Each row contains information about a specific device that was on loan to a specific user. The columns contain the following information:

- Id - the loan id of the device
- Model - the model of the device (e.g. Macbook pro)
- Serial No. - the serial number of the device (or equipment number if there is no serial number)
- User email - the email of the user the device was loaned to
- Requested - the date the loan was initially requested on
- Due date - the date the device was supposed to be returned by
- Returned - the date the device was actually returned by
- Late? - if the device was returned after the due date, this will read "Yes" otherwise it will read "No"
- Delete - a button when clicked will remove the information about this past loan forever

2.8 Disposed Page

The Disposed Page contains information on all the devices that have been disposed. These are devices that will no longer show up in the active inventory however, they will be included in the Inventory List described in 2.4.1. Each row constitutes a device that has been disposed whilst the columns present the following information:

- Item - the name of the item the device is associated with (e.g. 15" Laptop)
- Category - the category of the item (e.g. Laptops)
- Model - the model of the device (e.g. Macbook pro)
- Date disposed - the date in which the device was disposed
- Delete? - a button when clicked will remove the device from the system forever

3 Part III: Help

3.1 Where To Go For Help

Should you encounter any problems with the system please find epiGenesis at <https://www.epigenesys.org.uk/> or email them at hut-support@shefcompsci.org.uk.