HIVE RESOURCE MANAGER

Operation Manual

Team HRM, 2017

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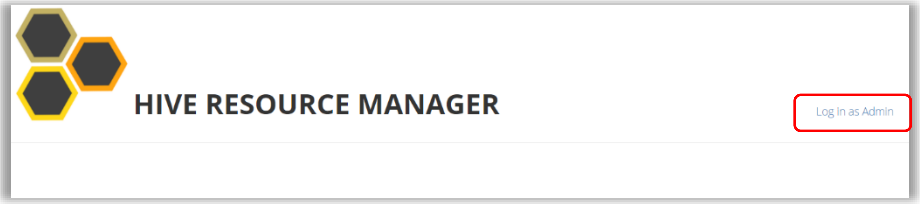
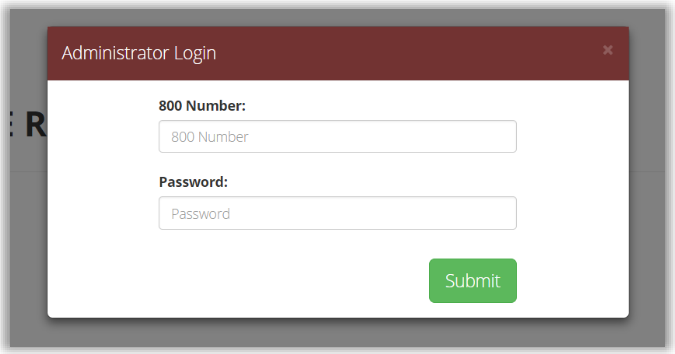
Admin Functionality

1. Logging in as an Administrator

To log in as an Administrator from the public view of the Hive application, click on the "Log in as Admin" link in the upper-right corner of the screen. Here is a screenshot of that link's location.



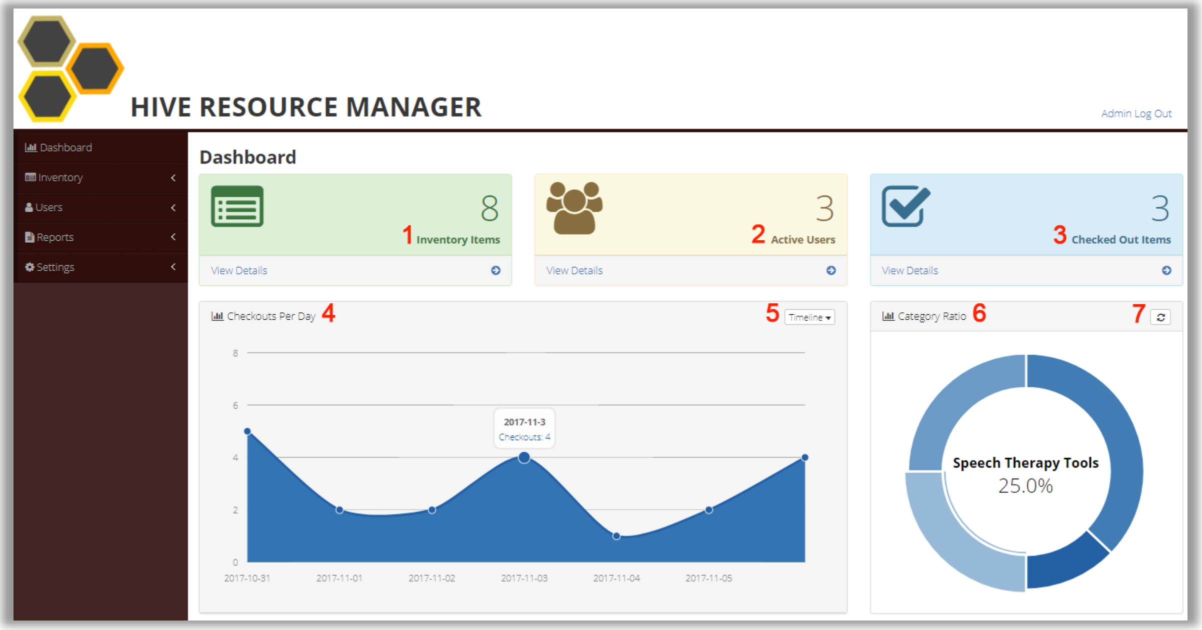
An Administrator is then prompted with a dialog to enter their credentials composed of their SIUe 800# and the password given to them by Team HRM.



On successful log in, the Administrator now has access to the Hive Administrator Portal. Within this part of the application, an Admin can Add/Edit Items in Inventory, Add/Edit Users, develop Inventory of User Specific Reports, and Hive Bug Reporting.

2. Using the Admin Dashboard

When an Administrator first logs in, the Hive Resource Manager Dashboard is viewable. This view is a way for an Administrator to get a quick glimpse of some important statistics about the system.



The three panels along the top of the Dashboard are totals aggregated from the system. The first panel, the Inventory Items Panel [1], lets an administrator know a quick count of how many items are currently in the active inventory of the system. The "View Details" link in this panel will direct an Administrator to the View All Inventory View (see section 5).

The next panel is the Active Users Panel [2]. This panel is designed to show a quick count of how many active users there are in the system. The "View Details" link within this particular panel will direct an Administrator to the User Reporting view where information about all users in the system or a single user can be received (see section 11).

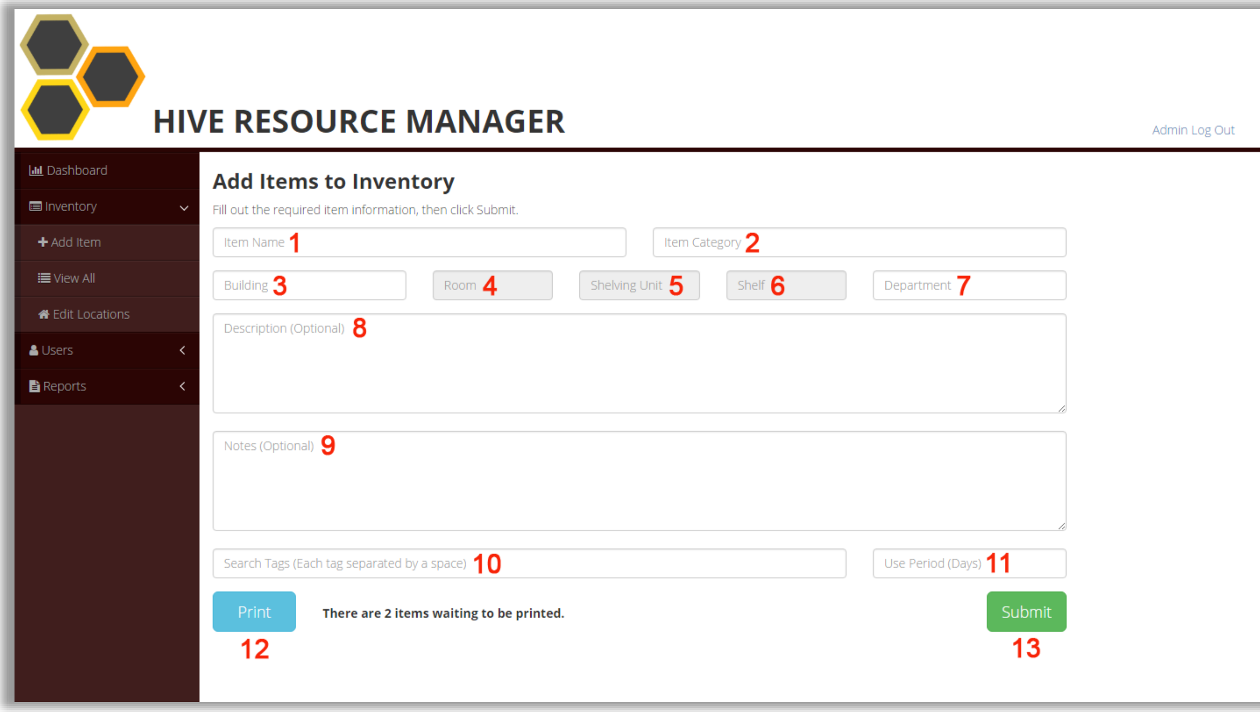
The final panel, the Checked-out Items Panel [3], displays a count of how many items are currently checked out of the system. The "View Details" link within this panel will direct an Administrator to the Inventory Reporting view where more finite information regarding the inventory can be drawn (see section 10).

The Checkouts Per Day Area Graph [4] shows a breakdown of the checkouts within the system by date. The left side displays the number of check outs. The lower line shows the dates. When a point on the graph is hovered, a small box will be visible showing the number of checkouts for that particular day. The Timeline Dropdown [5] in the upper right hand of the graph will allow a user to break the graph into larger timelines ranging from the past week, to the past month, and to the past year.

The Category Ratio Doughnut Graph [6] displays a percentage ratio of inventory item categories within the system. The Refresh Button [7] in the top right corner will refresh the graph data as needed.

3. Adding Items to Inventory

Inside of the Administrator Portal, an administrator has the option of adding a new item to the inventory database. Here is an image of what that view looks like inside of the portal:



To start, on the top row of the input fields, the first field to enter is for the Name [1]. For example, if the item that is being entered is named "Phonological Awareness", then that would be an appropriate name to be input here.

The next field is for the Category [2] that the item would fit into. For instance, there may be a "Books" or "Board Games" Category to assign an item to. If a new Category needs to be entered, then this input field allows for that new entry as well.

Moving onto the next row of inputs, this is where the location for an item is set. To start, a Building [3] must be entered or selected from the dropdown list. If this is the first time entering a Building, then a new entry will need to be added here first. Notice that the next three input fields are grayed out. This is because each additional input field following Building is dependent on the input field that resides before it.

The next input field following Building is for a Room [4]. You can select from a dropdown list of rooms associated with the Building that is selected or entered, or a new Room entry can be made.

The next input field is for a Shelving Unit [5]. A Shelving Unit can be selected from the dropdown list, or a new entry can be made. The same holds true for the next input field. This field is for the Shelf [6] location of the item. A selection can be made from the drop down, or a new entry can be made.

The last input field in this row is for the Department [7] that the item is assigned to. This helps differentiate items in case other department's items become included inside of the Hive Resource Manager.

Moving down the rows of input fields, the next is a text area for entering a Description [8] for an item. This field is optional and not required to submit the final item entry

The next input field is the Notes [9] text area. This field is also not mandatory. This is an area to provide specific Notes about an item.

The last row of input fields is for Search Tags [10] and Use Period [11]. Search tags can be entered and separated by a simple white space. Each Search Tag can be used to help search for and identify certain items in the system when either an end-user chooses to search the catalog for specific items or when an administrator wants to sift through the complete list of inventory items in the View All Items screen. Use period is based on days. This is a basic parameter for how long an item can be checked out by a user.

Once all required fields are entered, press the Submit Button [13] at the bottom of the page. You will receive a green feedback bar across the top of the Add Items to Inventory screen displaying that your item has been successfully added to the inventory.

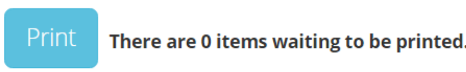
You will also notice that the Print Queue [12] incremented, and the item was added to the Print Queue for printing to label. This leads us into the subject of printing labels.

4. Printing Labels

When logged in as an Administrator, the functionality for printing labels while creating inventory items in the database is available. To utilize this functionality, there are two views to do this within.

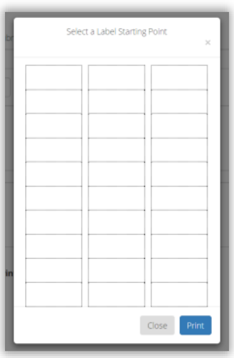
4.1 Printing from the Add Item Screen

The first view is the Add Item view in the Admin Portal. This is the view that allows for the Administrator to create items in the inventory database. This view contains a blue “Print” button on the lower left hand of the screen. This is your starting point for printing labels. As another useful tool, there is a counter next to this button letting the Administrator know how many items are waiting in the queue to be printed.

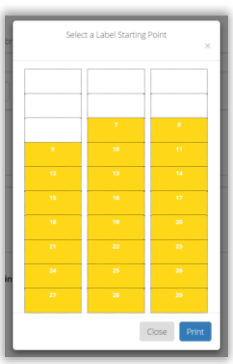


Let’s start by clicking the Print button with items waiting in the print queue:

1. On click of the blue Print button, another window opens asking for the selection of a starting point within a grid of labels. (see example image)



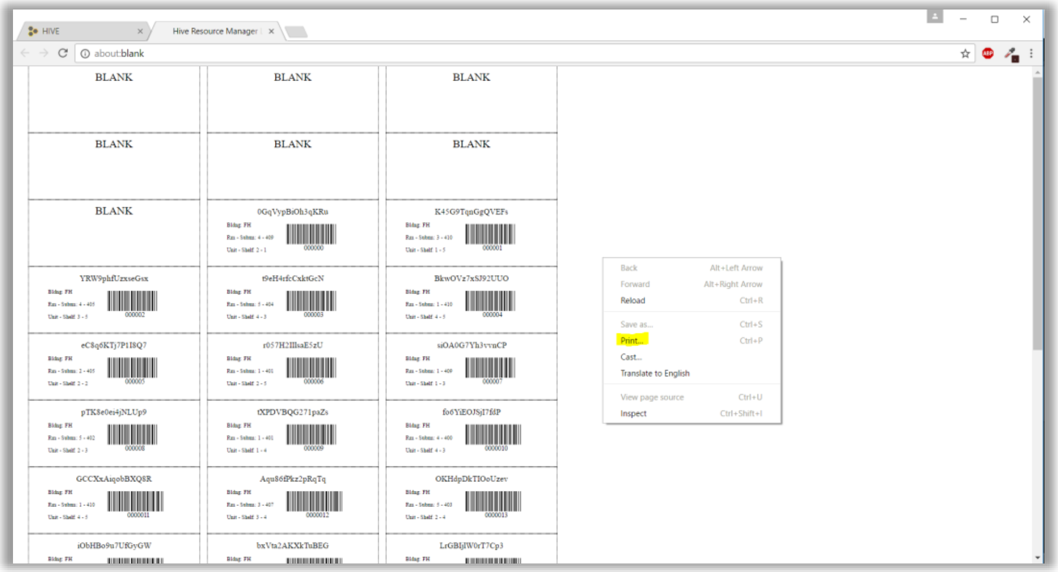
2. When a starting point is selected, the label area that was clicked and all following label areas are highlighted yellow as an example of what labels will be printed on. (see example image)



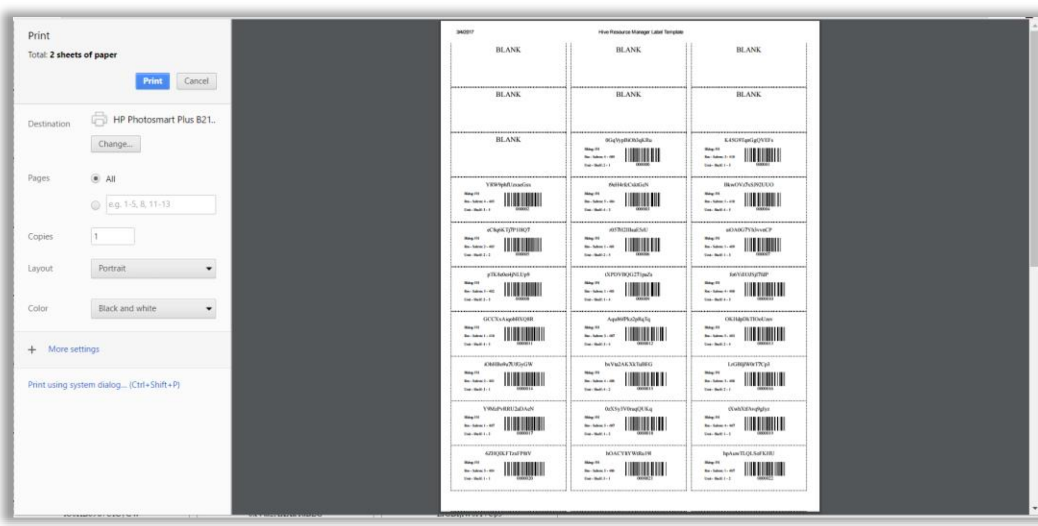
3. After reassuring that the starting point is correct, click the Print button on the lower right of the secondary window.

4. A new window will display within the browser. This is the screen with the formatted label sheet that is ready to be printed.

5. With the cursor in this new browser window, right-click on the screen and select “Print” (see example image)



6. A new Print dialog screen will display. Make sure that there are adequate label sheets in the printer that the labels are being printed to, and click Print in the print dialog screen. (see example image)



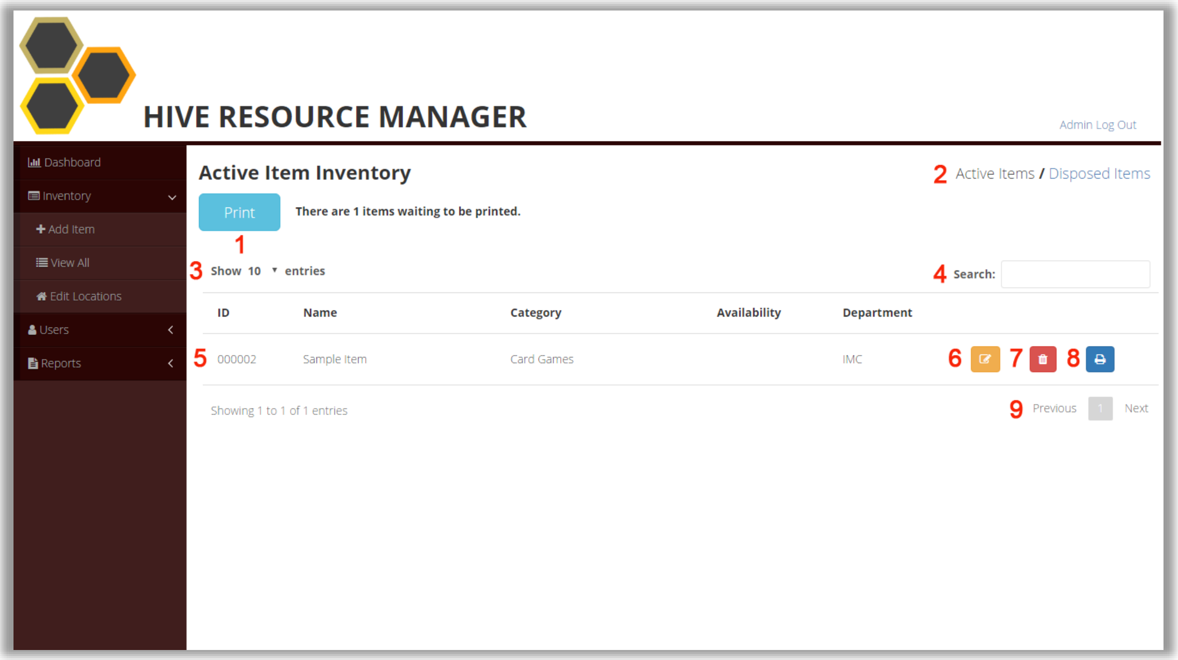
7. Verify the print quality of the labels is ok. If there is an issue, simply repeat steps 5 – 7.

4.2 Printing from the View All Items Screen

See the section about Viewing All Items in the Inventory

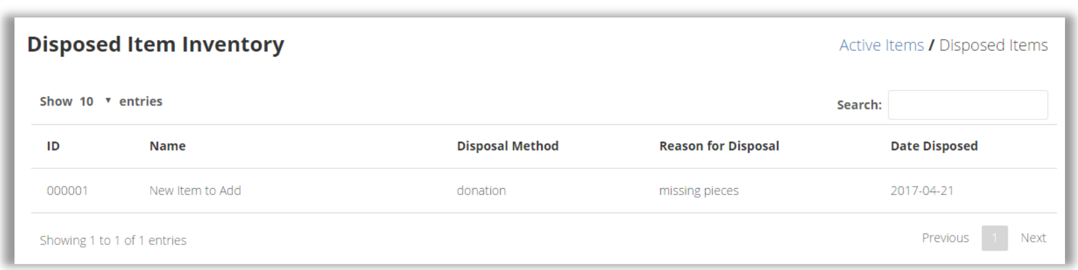
5. Viewing All Items in the Inventory

Inside of the Administrator Portal, under the Inventory option in the vertical menu bar, there is an option for "View All". This view allows an administrator to view all the items in the inventory database, view all items that have been disposed, and even edit or reprint labels for items. Here is an image of what that view looks like in the portal:



The first thing you might notice is the same Print Queue [1] button that was in the Add Item view. This allows for the exact same print functionality that was just outlined previously in the Printing Labels section. This is also an indication of how many items are currently in the Print Queue.

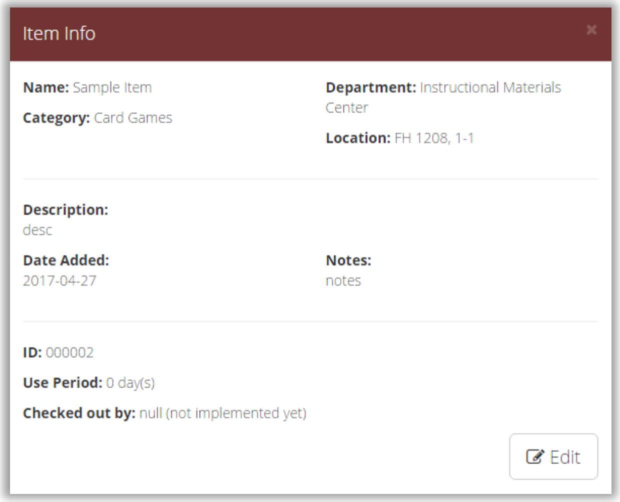
Next is the Active items/Disposed items [2] table view toggle. Selecting one of those options will allow for the viewing of what is described, either a table of the Active items or a table of the Disposed items. Here is an image of the Disposed Items table:



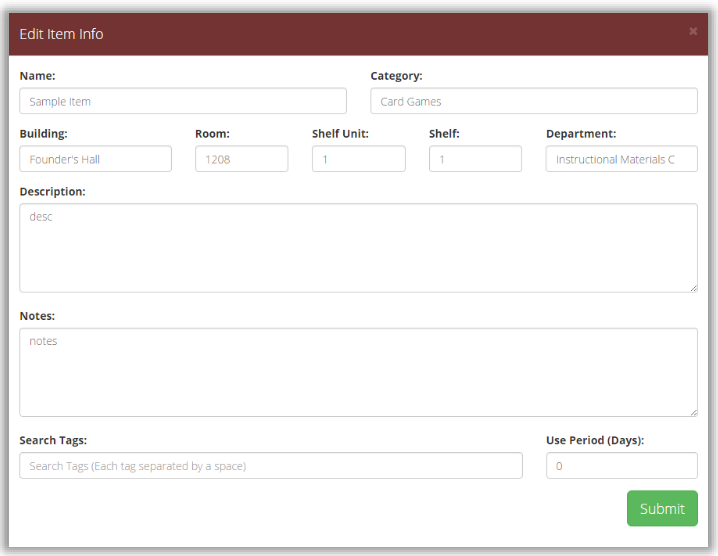
Each table can parse out several items you want viewable in the table. Those amounts are 10, 25, 50, 100. The Show Entries [3] dropdown allows for that selection.

Search [4] functionality is allowed within the table of items. Search is based on the item ID, Name, Category, or Department. Going a step further, items can also be searchable on the Search Tags for an item. For instance, if items had been tagged with a Search Tag such as "aphasia", then searching for "aphasia" will bring up all those items that have that Search Tag assigned to them.

An Active Item Row [5] is broken down into specific columns of ID, Name, Category, Availability, and Department. At the end of each row is the functionality for Edit, Delete/Dispose, and Print. By double clicking on an Active Item Row, a new dialog will open showing specific information for that item. Here is an image of the Item Info Modal:

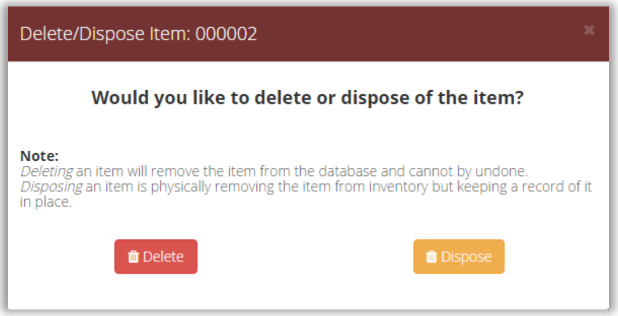


This Modal also has the option of Edit which is also the first button at the end of the Active Item Row. On click of the Edit Button [6], a new dialog will appear that looks much like the Add Item View. This allows for an item to be edited. Here is an image of the Edit Item Modal:

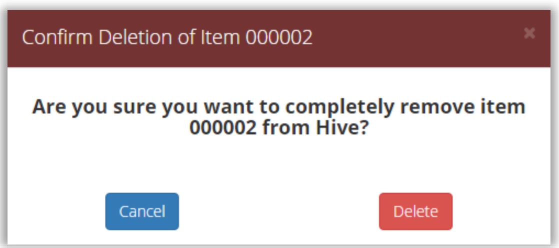


The next button at the end of the Active Item Row is the Delete/Dispose Button [7]. This allows for the administrator to either delete or dispose of an Active Item. Deleting an Active Item is essentially removing all traces of an item that was added to this system. If for instance there was an incorrect entry of an item and it isn't needed, then the Delete functionality is essential.

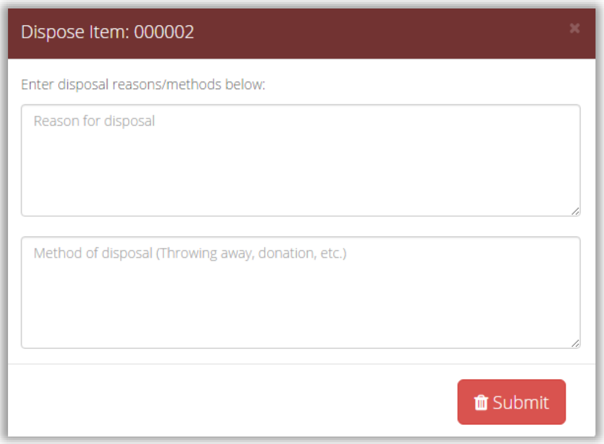
The Dispose on the other hand removes an item from the Active Item Inventory and marks that item as Disposed. This method is so that a record can persist of that item's existence as needed. Here is an image prompting for the type of method to choose after clicking the Delete/Dispose Button:



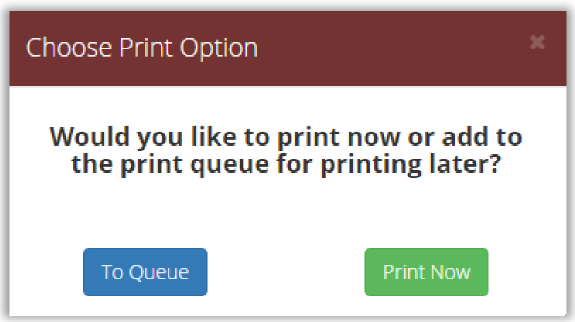
As you can see, there are two options to choose from, Delete or Dispose. On click of the Delete, another dialog prompts, asking if you are sure you want to delete. Here is an image of that prompt:



If the Dispose method were chosen, then another dialog opens asking for a reason and method for disposal. A reason might be "missing pieces" or "damaged". The method might be "donated" or "threw away". Here is an image depicting that dialog:



The last button contained in the Active Item Row is the Print Button [8]. This allows for an item to have its label reprinted. A reason for reprinting might be that a label was damaged or torn. When reprinting, you have two options. The label to be reprinted can either be reprinted alone or it can be added to the queue of items in the Print Queue. Here is an image of a dialog that give that option:

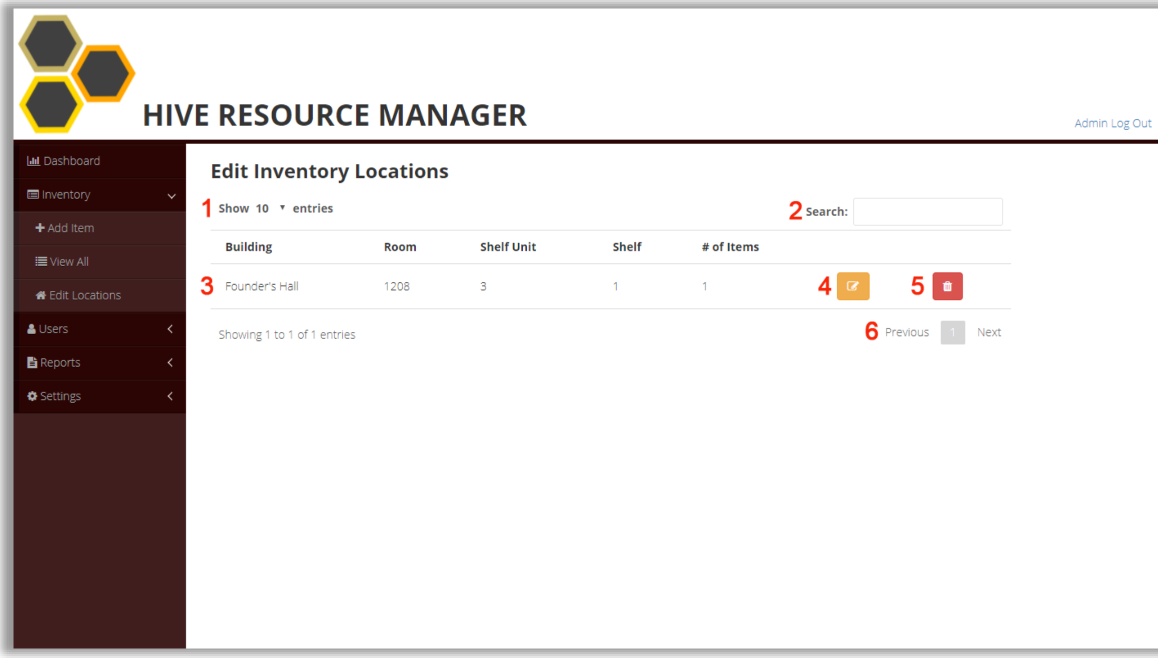


If an administrator decides to add to the Queue, the item's label will be printed when the other item's in the queue are printed. If the Print Now is selected, the administrator will need to follow the same method outlined in the section Printing Labels.

Last within this view is the Paging [9] of the table. A table, dependent on how many items an administrator has opted to view, can be viewed in pages, and this allows for this functionality.

6. Editing Inventory Locations

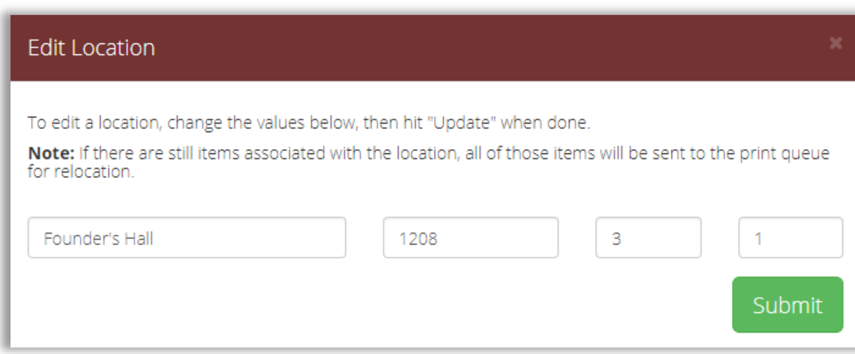
While tracking inventory, it may become necessary to edit Inventory locations. A Shelf Unit may change, or a room number may need to be edited. Inside of the Hive Administrator Portal, an admin can make those necessary changes as needed under the Inventory option in the vertical menu bar with the sub-option, "Edit Locations". This view allows an administrator to view all the locations in the inventory database.



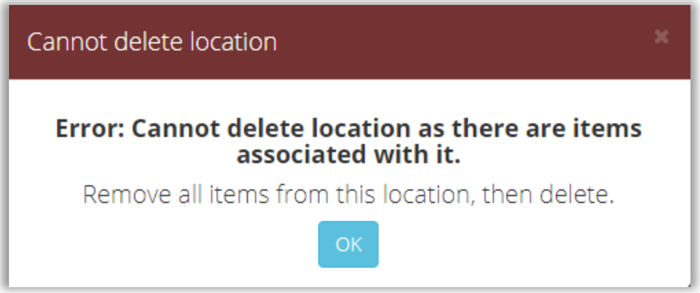
Each table can parse out several items you want viewable in the table. Those amounts are 10, 25, 50, 100. The Show Entries [1] dropdown allows for that selection.

Search [2] functionality is allowed within the table of items. Search is based on the Building, Room, Shelf Unit, Shelf, or Number of Items for a location. A Location Row [3] is comprised of the Building, Room, Shelf Unit, and Shelf that makes up a specific location. The number of items in that location is also shown in that row along with an Edit Button [4] and Delete Button [5].

On click of the Edit Button, a user can edit any location's piece of data inside of an Edit Location Modal. If there are items associated with that location, those items will be sent to the print queue to be reprinted on labels to be reapplied to their respective item.



A user can also delete a location by clicking the Delete Button within that specific row, yet if there is inventory that is still associated with that location, the location cannot be deleted. An advisory dialog will be shown if this is the case.

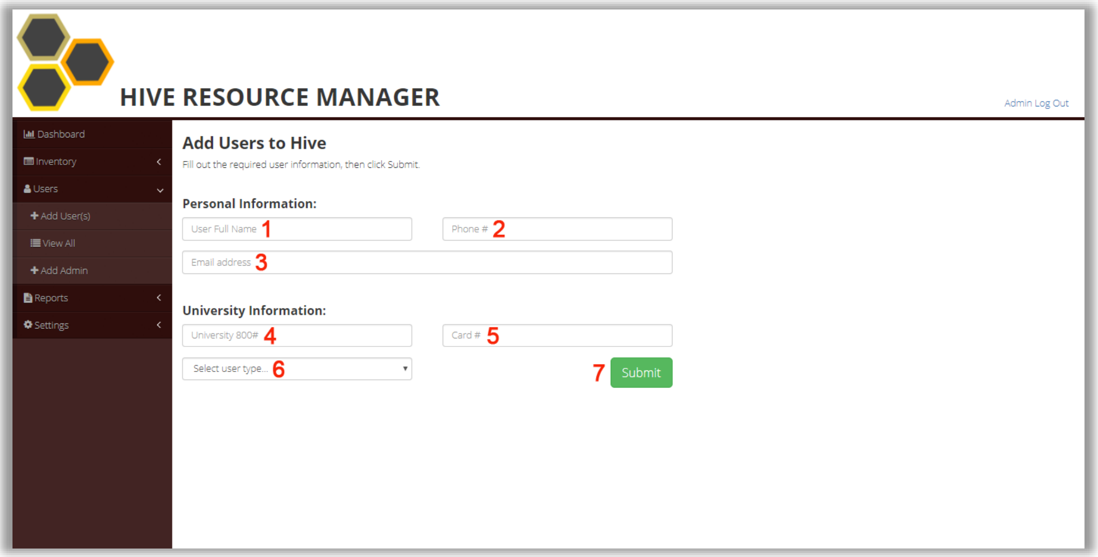


To fix this issue, remove or edit all items in that location to proceed. TO NOTE: a location delete will mostly be used when an error has occurred on the initial input or creation of a location when an item is added.

Last within this view is the Paging [6] of the table. A table, dependent on how many items an administrator has opted to view, can be viewed in pages, and this allows for this functionality.

7. Adding Users

An Administrator can add users to the Hive Resource Manager, allowing restrictions on who can use the system based on who has adequate credentials. This is made possible within the Add User(s) view within the Administrator Portal.



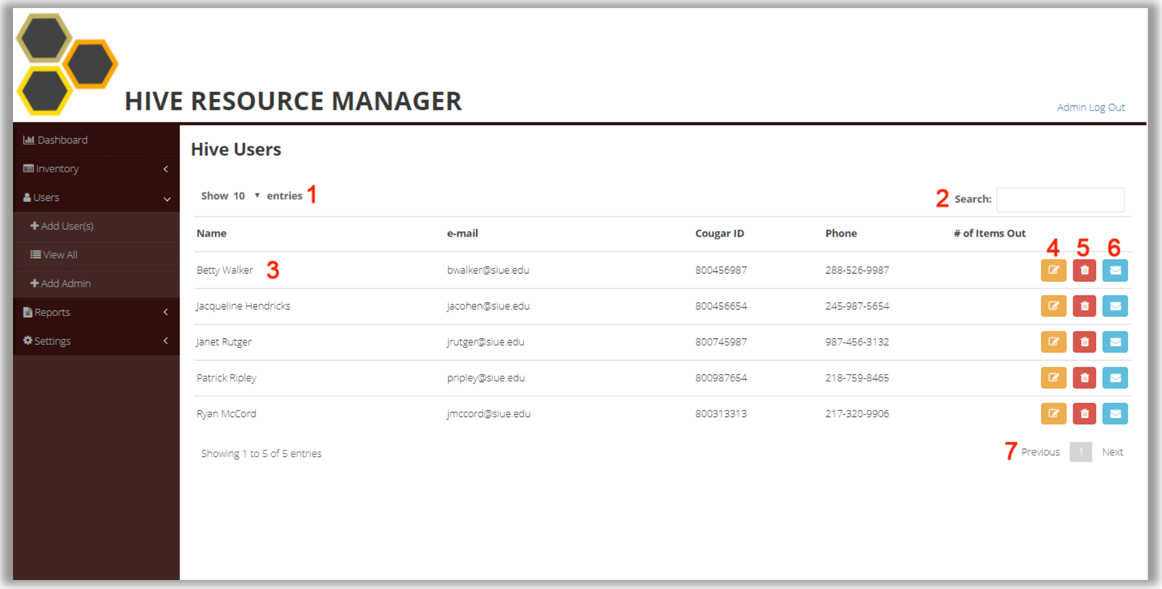
An Administrator will need to input all information to add a user to the system. The user's Personal Information will need to be input first. The User Full Name [1] textbox has the user's full name, First and Last, entered within it. The Phone # [2] text box will need to contain the user's 10-digit phone number where they can be best reached. The textbox will auto-format with dashes as "*xxx-xxx-xxxx*". The Email Address [3] of the user is the next information that will need to be provided. The email needs to be formatted as "*example@email.com*", as an example.

Next, the user's University Information needs to be input. The University 800# [4] textbox will contain the user's university 800 number. The Card # [5] textbox will contain the 16-digit card number of the user's Cougar card. With the textbox in focus (*clicked*), a card can be swiped with the card ready to obtain the user's 16-digit number automatically. The last Select User Type [6] dropdown let's an Administrator assign a user as "*Assisted*" or "*Self-serve*". Any "*Assisted*" assigned user will have to have the Administrator help them with any checkouts from the system.

Finally, the Submit Button [7] submits the form for entry of the user into the Hive Resource Manager system.

8. Viewing All Users

An Administrator can get a glimpse of all users in the Hive Resource Manager by clicking on the "*View All*" selection in the "*Users*" tab. From here there are an assortment of options available to edit, remove, or email a user.

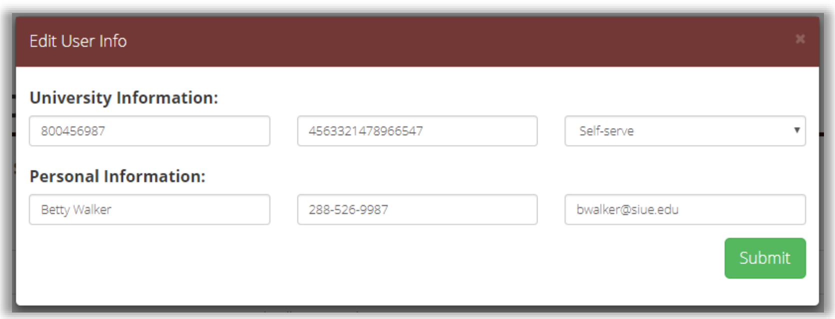


The Hive Users table will display the users that are currently in the system. The Show Entries [1] dropdown will allow an Administrator to select a range of users from 10, 25, 50 and 100 to be displayed in the table. This view also has Paging Button [7] functionality that allows an Administrator to page through the table entries for ease of use.

The Search Textbox [2] is a tool that allows the Administrator to search through the table or list of users in the system by inputting the name, email, phone, Cougar ID, or number of items checked out. The resulting search will be a populated table with the selected number of rows to display.

A single user is displayed in a User Row [3]. Within this row, the user's name, email, Cougar ID, phone number, and number of checked out items can be seen. If a User Row [3] is double-clicked, then a modal showing all the information about the user is displayed.

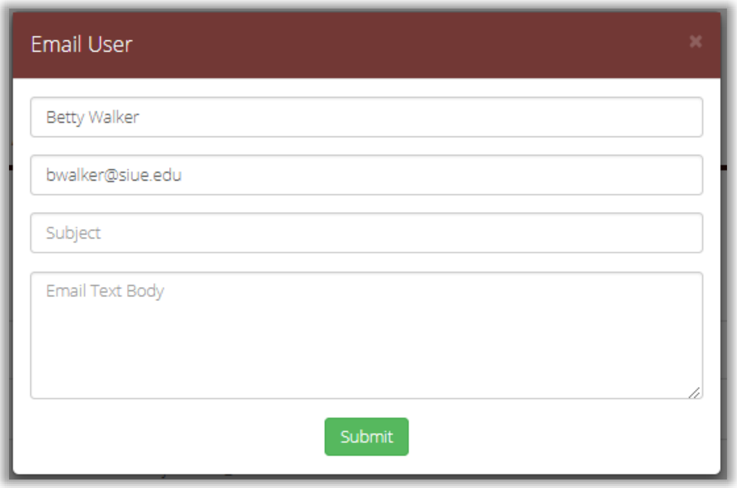
At the end of each User Row [3], there are three buttons. The first button, the Edit User Button [4], will open a modal allowing an Administrator to edit any information about the user.



The second button, the Delete User Button [5], will delete a user from the Hive Resource Manager. TO NOTE: If a user has items checked out, then they are not allowed to be removed from the Hive Resource Manager. All attempts will need to be made to have that user return any items that are still out needing to be checked in.

8.1 Emailing Users

The last button, the Email User Button [6], opens a modal for sending an email to a user. The name and email address are automatically populated, and the two additional input areas are for the subject line of the email and the body of the email.



8.2 Automatic Email Reminders

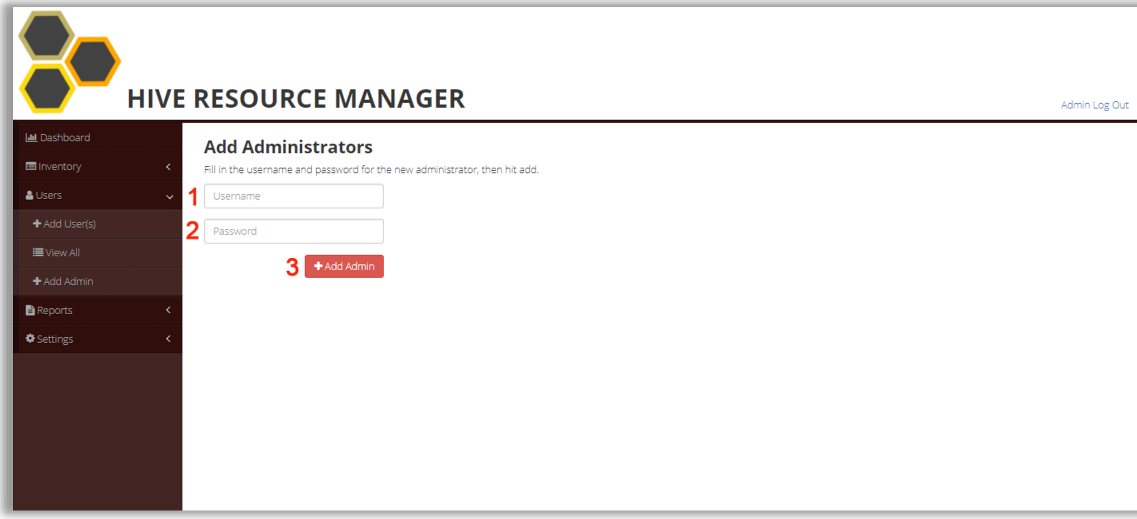
The Hive Resource Manager automatically notifies users by email when an item is due. This is done from the server-side of the program and requires no effort by the Administrator. All automatic email reminders are sent out at 7am to all users with items checked out.

The reminders are sent the day before an item is due, the day the item is due, and every subsequent day the item that is checked out is late. The email message is static, meaning that it can only be changed by the HRM development team.

If email changes are needed, please address the changes by making a suggestion in the Settings menu option of the program. A HRM developer will contact the Administrator directly following the suggestion being received (see section 12).

9. Adding an Admin

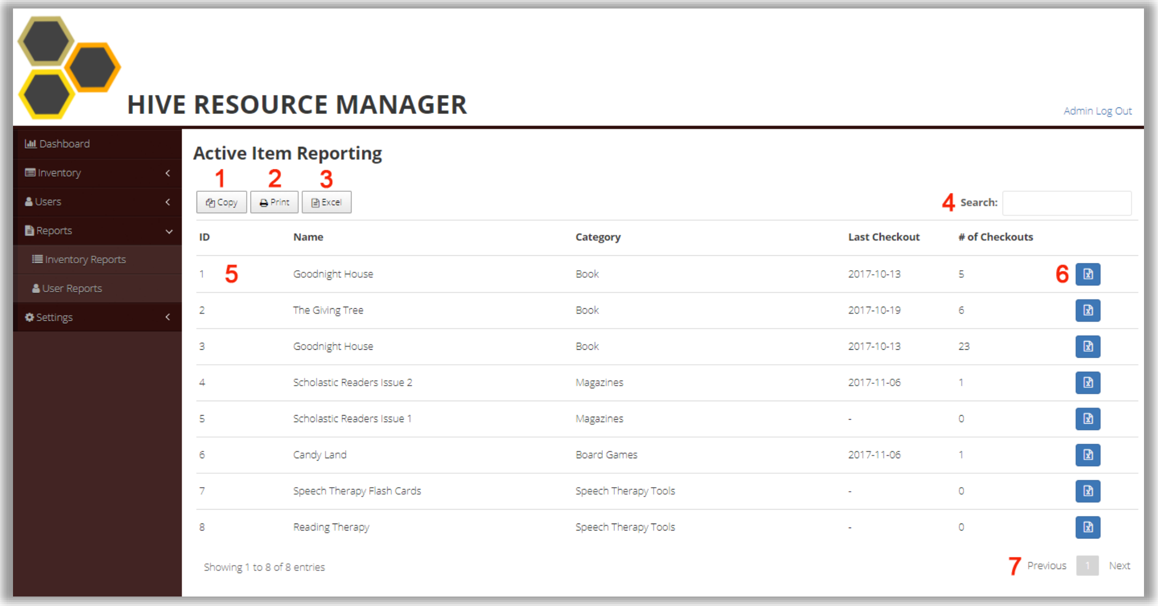
In time, it may become necessary for an Administrator to add additional Administrators to the Hive Resource Manager. This can be done from the "*Add Admin*" option in the "*Users*" tab.



All an existing Administrator will need to do is insert a new Administrator's 800 number in the 800 Number Textbox [1] and allow the new Administrator to create a password in the Password Textbox [2]. The Add Admin Button [3] will secure the new user as an Administrator in the Hive Resource Manager.

10. Generating Inventory Reports

The Hive Resource Manager will allow an Administrator to pull reports for Inventory items. This is available under the Reports tab in the Admin view. There are two different availabilities for this feature. The entire Inventory catalog can be reported or a single item in Inventory can be pushed to a report.



There are 3 different options for creating a report for the entire Inventory catalog. By using the Copy Button [1], an Administrator can copy all the information in the displayed table to their clipboard where the data can be pasted into an excel sheet or a text document.

The second option for pulling a report is the Print Button [2] option. This will generate a printable window containing all of the table information containing the inventory items.

The third option, the Excel Button [3], will download an excel sheet of the inventory table information to the Administrator's browser window with the file name "*Hive Inventory Report.xlsx*", allowing the information to be viewed and handled in the Microsoft Excel program. Here is an example of the Excel export feature.

	A	B	C	D	E	F
1	**ID**	**Name**	**Category**	**Last Checkout**	**# of Checkouts**	
2	1	Goodnight House	Book	2017-10-13	5	
3	2	The Giving Tree	Book	2017-10-19	6	
4	3	Goodnight House	Book	2017-10-13	23	
5	4	Scholastic Readers Issue 2	Magazines	2017-11-06	1	
6	5	Scholastic Readers Issue 1	Magazines	-	0	
7	6	Candy Land	Board Games	2017-11-06	1	
8	7	Speech Therapy Flash Cards	Speech Therapy Tools	-	0	
9	8	Reading Therapy	Speech Therapy Tools	-	0	
10						

TO NOTE: The only information that will be exported is what is viewable and contained in the Inventory Reporting table. If an Administrator uses the Search Textbox [4] to look for specific items and then decides to export, only those searched items will be contained in the exported report.

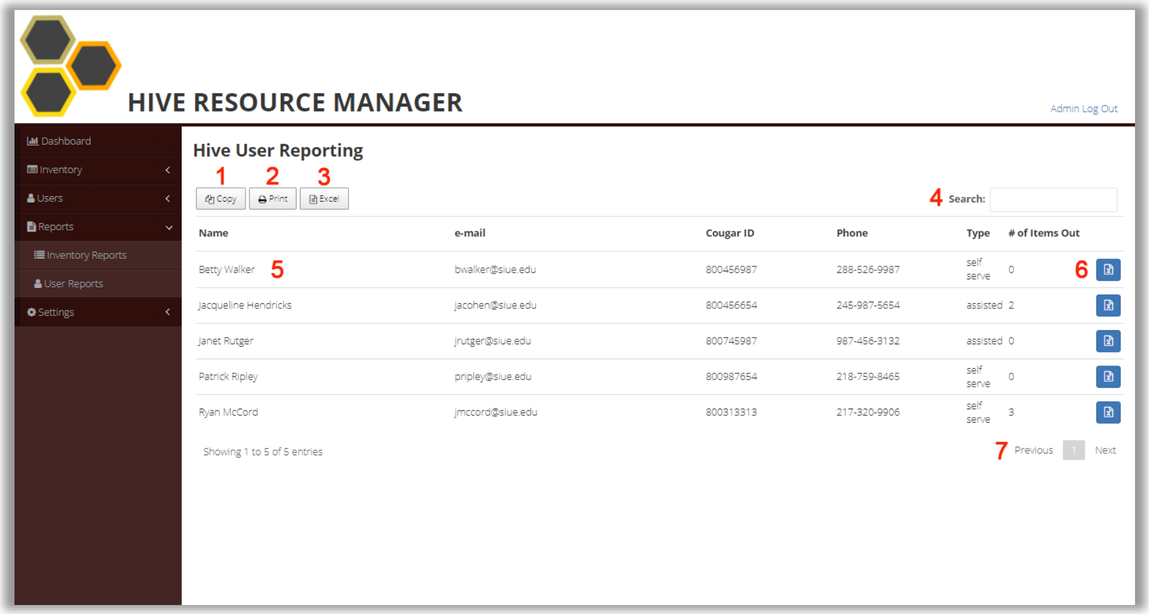
A Single Inventory Item Row [5] of data contains the ID, Name, Category, and Checkout information for a single item. An Administrator can export the information for a single item by clicking the Excel Export Button [6] in the row of the item needing exported. This will download an excel file with the name format of "*[name of item].xlsx*". Here is an example of the Excel single item export feature.

	A	B	C
1	ID	Name	
2	1	Goodnight House	
3			
4	Checked Out By	Check Out Date	Check In Date
5	Betty Walker	2017-10-13	2017-10-26
6	Ryan McCord	2017-10-13	2017-10-26
7	Patrick Ripley	2017-10-13	2017-10-26
8	Janet Rutger	2017-10-23	2017-10-26
9	Ryan McCord	2017-10-26	
10			

This specific report will show the ID and Name of the item as well as a check out history of the item, showing who it was checked out by, when it was checked out, and when and if it has been checked in.

11. Generating User Reports

Reporting of users is available under the Reports tab in the Admin view. This reporting allows for two types of reporting. The first is a full report of all users in the system, and the second is a report for a single user.



There are 3 different options for creating a report for the entire user catalog. By using the Copy Button [1], an Administrator can copy all the information in the displayed table to their clipboard where the data can be pasted into an excel sheet or a text document.

The second option for pulling a report is the Print Button [2] option. This will generate a printable window containing all of the table information containing the users in the system.

The third option, the Excel Button [3], will download an excel sheet of the user table information to the Administrator's browser window with the file name "*Hive User Report.xlsx*", allowing the information to be viewed and handled in the Microsoft Excel program. Here is an example of the Excel export feature.

	A	B	C	D	E	F
1	**Name**	**e-mail**	**Cougar ID**	**Phone**	**Type**	**# of Items Out**
2	Betty Walker	bwalker@siue.edu	800456987	288-526-9987	self serve	0
3	Jacqueline Hendricks	jacohen@siue.edu	800456654	245-987-5654	assisted	2
4	Janet Rutger	jrutger@siue.edu	800745987	987-456-3132	assisted	0
5	Patrick Ripley	pripley@siue.edu	800987654	218-759-8465	self serve	0
6	Ryan McCord	jmccord@siue.edu	800313313	217-320-9906	self serve	3

TO NOTE: The only information that will be exported is what is viewable and contained in the User Reporting table. If an Administrator uses the Search Textbox [4] to look for specific users and then decides to export, only those searched users will be contained in the exported report.

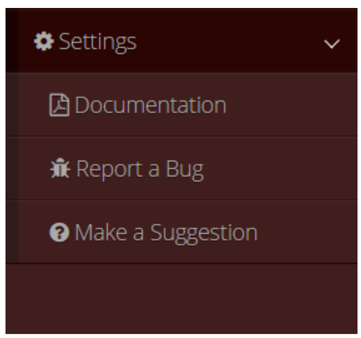
A Single User Row [5] of data contains the Name, Email, Cougar ID, Phone Number, Type of User, and Number of Items Checked Out for a single user. An Administrator can export the information for a single user by clicking the Excel Export Button [6] in the row of the item needing exported. This will download an excel file with the name format of "*[name of user].xlsx*". Here is an example of the Excel single user export feature.

	A	B	C	D	E
1	Name	Email	Phone	800 Number	Type
2	Jacob Hendricks	jacohen@siue.edu	245-987-5654	800456654	Assisted
3					
4	Item ID	Item Name	Checkout Date	Check in Date	
5	4	Scholastic Readers Issue 2	2017-11-06		
6	6	Candy Land	2017-11-06		
7					

This specific report will show the pertinent information about the user as well as a complete check out history of items for that user.

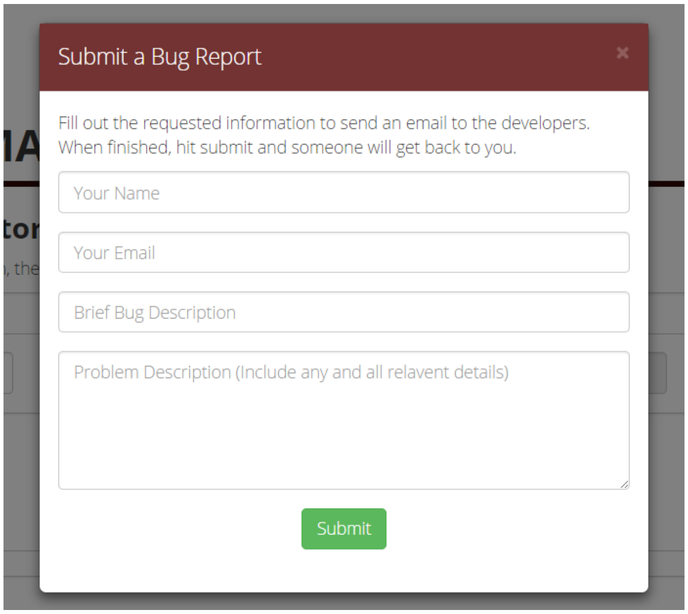
12. Admin Settings Menu

Within the vertical menu bar in the Hive Administrator portal, an Admin has the options of creating a bug report, making a suggestion for improvement, and viewing the Hive Operational Manual within a web browser.

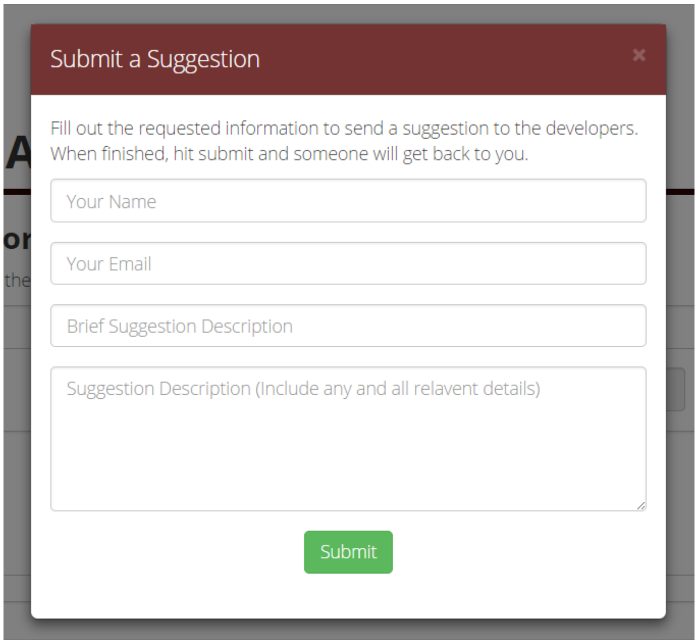


On selection of the "Documentation" menu item, a new browser window will open with a PDF of the Hive Operational Manual, complete with a table of contents that has hyperlinks to the chapter being looked for.

Reporting a bug within the Hive Resource Manager is as easy as clicking the “Report a Bug” menu item. When this is clicked, a dialog prompting the user to fill out a short form indicating the bug or error that was found. An email will be sent directly to the Hive Resource Manager development team immediately. Here is an example of that dialog.



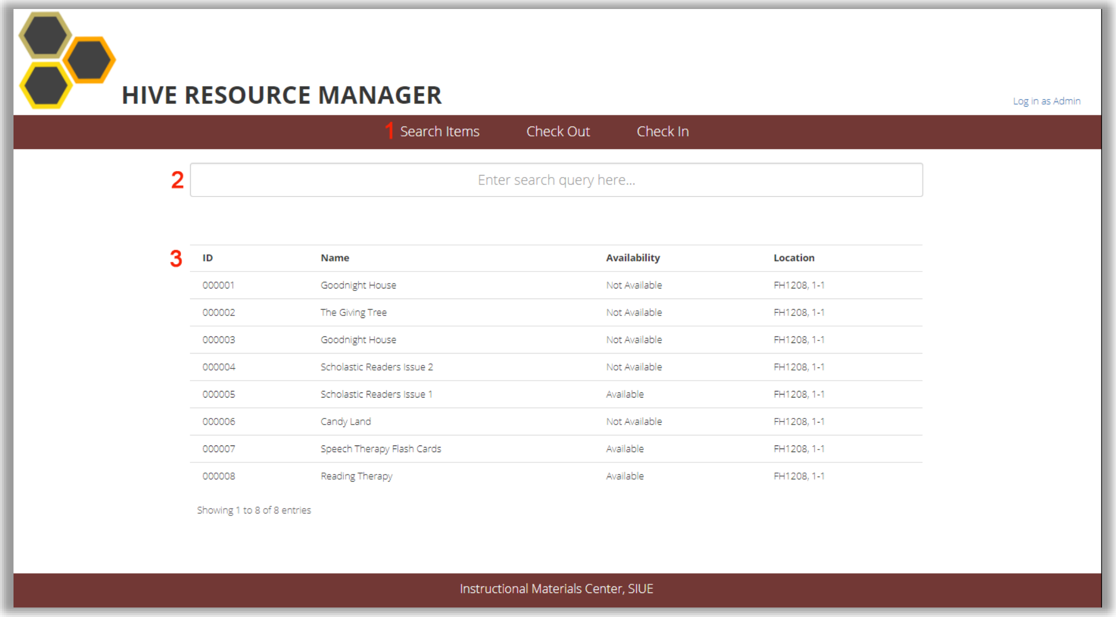
Making a suggestion for an improvement to the application is just as easy. Simply click on the “Make a Suggestion” menu item and another dialog prompting you for information will show. This too will send an email immediately to the Hive Resource Manager development team.



Public Functionality

13. Searching for Inventory Items

Within the Public View, there are three functions a user must choose from. The first, Search Items Nav Button [1], will take a user to a view where they can search the Hive Resource Manager System to find materials and items that they need. This is also the default page for the Public View.

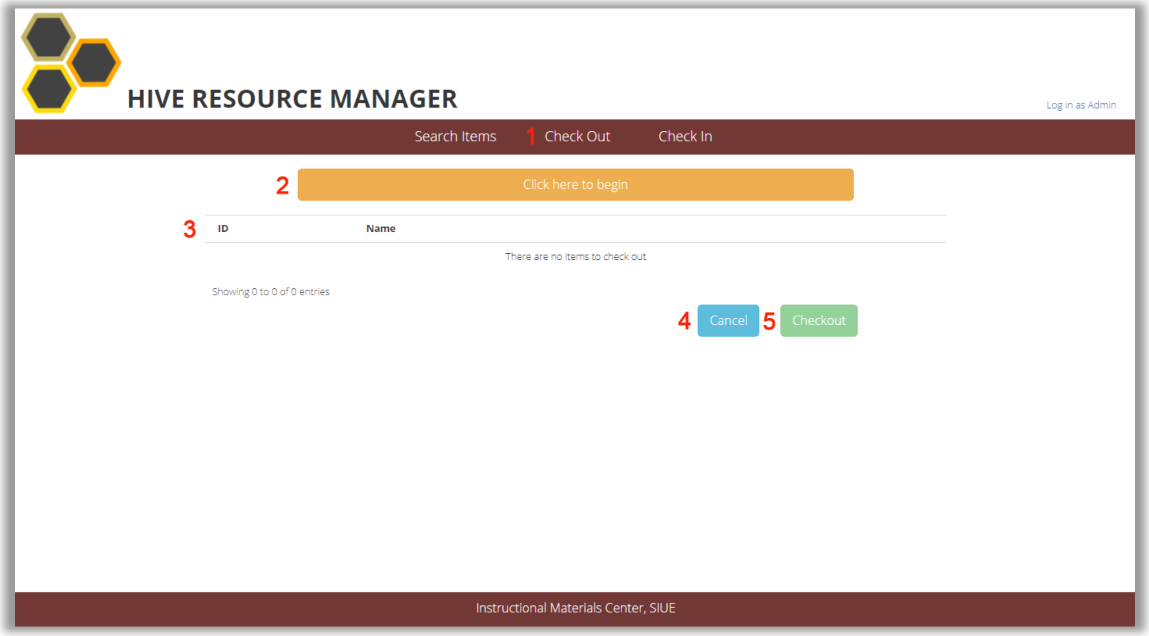


A user can search the inventory of items from the Search Textbox [2] by inputting the name of an Item, the ID of an item, the category of an item, or the search tags of an item. The Inventory Results Table [3] will show the results of the search query.

If there are no search criteria, then the table will be populated with all inventory in numeric order. A user will be able to identify if an item is available or not available by the Availability column, and they will be able to verify the location of the item in the system from the Location column for easy retrieval.

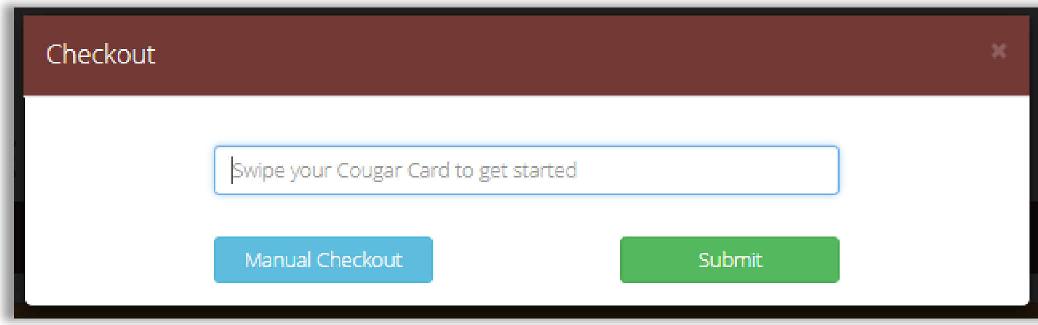
14. Checking Items Out

The second of the three Public View functions is the Checkout Nav Button [1]. From this view, a user can begin the checkout process.



The Items to Checkout Table [3] will display all of the items that the user intends to checkout. A checkout process can be cancelled by clicking the Cancel Button [4], and a checkout transaction can be made by clicking the Checkout Button [5]. To start the checkout process, a user will need to click the Begin Checkout Button [2].

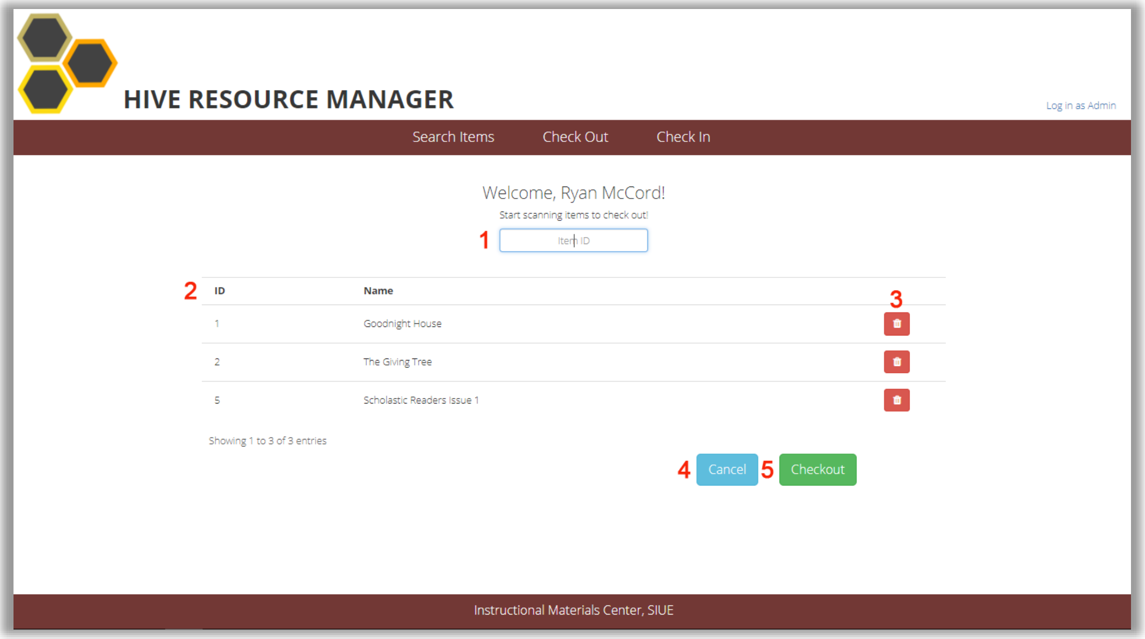
Once the Begin Checkout Button [2] is clicked, a user will be prompted to swipe their Cougar Id using the card reader at the Hive Resource Manager computer station. TO NOTE: A user's email or 800 Number can also be manually entered into the modal.



From here, it is important to cover all three types of checkouts that are available. The following sections will describe in detail the process for each type.

14.1 Self-serve Checkout

The first type of use is a self-serve user. This user is allowed to come and go freely, checking out items from the Hive Resource Manager as they wish without assistance from the Administrator.



Once a self-serve user has swiped their card, they will be greeted inside of the Checkout page. This user can begin scanning the items that they wish to checkout from the system. As each item's barcode is scanned, the Items to Checkout Table [2] will be populated.

A user can also manually enter the Item Id into the Item Id Textbox [1] in case they are having issues with the barcode scanner reading the item's barcode. If a user wants to remove an item from the Checkout Table [2], they simply have to click on the Remove Button [3] in that specific item's row.

Once all items are scanned, the user will need to complete the checkout transaction by clicking the Checkout Button [5]. A small window will open letting the user know that they have successfully checked out their items. If a user wishes to cancel the whole checkout transaction, they can click on the Cancel Button [4], returning them to the Search Items page.

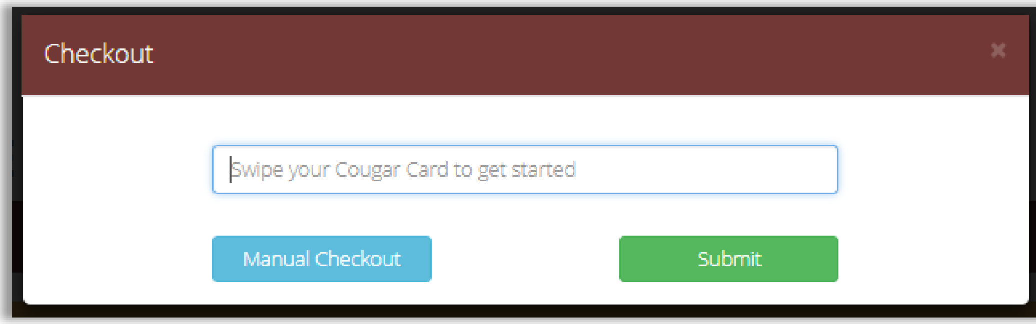
14.2 Assisted Checkout

The second type of user is the assisted user. This user can locate and retrieve their own items, but an Administrator must assist them with their checkout.

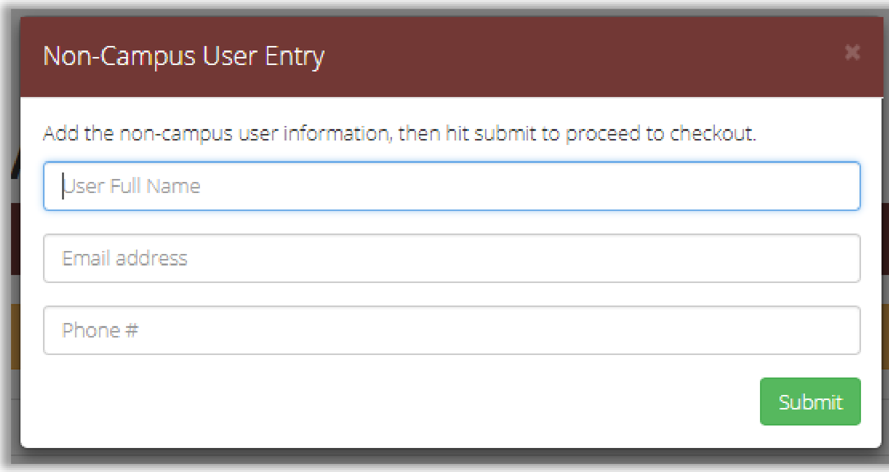
There is not much difference to the process of checking items out for this user as compared to the self-serve type. Following a successful card swipe, the assisted user will need to have the Administrator enter their credentials and aid them in the checkout process as described in the Self-serve Checkout section above (see section 14.1).

14.3 Non-campus Checkout

The third and final type of user is the non-campus user. This is a user that does not need to use the Hive Resource Manager very often nor are they a student, yet they still need to have access to the system on occasion. With help from the Administrator, the non-campus user will begin the checkout process by clicking the Begin Checkout Button.



The Administrator will need to click on the Manual Checkout Button inside of the modal. From here, the non-campus user's information will need to be input and saved.

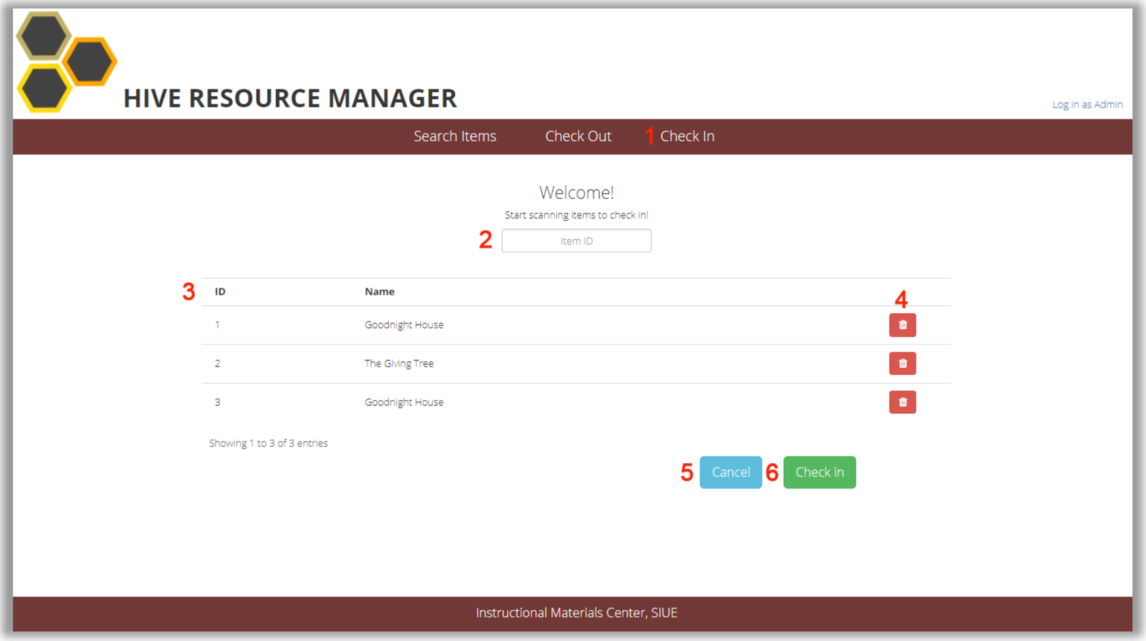


The required information for this user is their full name, their email address, and a phone number. This information is required in case contact needs to be made regarding any outstanding items this user might checkout.

The checkout process does not change for this user in comparison to the other two types, yet the Administrator will need to assist with this user's checkouts as well. Refer to the section about the Self-serve user checkout above for information on completing the checkout process for this user(see section 14.1).

15. Checking Items In

The Check In function can be navigated to with the Check In Button Nav [1]. Check in does not require that a user initiate any type of credential input to begin checking in items. Any user can begin scanning items to be checked in. As items are scanned or manually entered in the Item Id Textbox [2], the Items to Check In Table [3] will begin populating with the items.



If a user decides not to check in an item that they have scanned, they can simply click on the Remove Button [4] in the corresponding item's row and remove that item from the table.

To complete the check in transaction, a user will need to click the Check In Button [6]. The user will then be notified in the window that the items were successfully checked in. If a user opts not to check in the items, the can click the Cancel Button [5] which will cancel the transaction and return the user to the Search Items screen.