# 1. Administrator Guide

## 1.1 Overview

The focus of this document is to provide instruction for administrators of the WU Regalia system. Upon logging onto the website, if a user is designated as an administrator in the system database, they will automatically be redirected to the administrator side of the website. The initial admin user is decided upon installation of the system, other admins can be added by current admins in the system (see the User Account Management section). The tasks that can be performed by an administrator can be classed in the following categories:

- Reservation Management
- Donation Management
- Special Request Management
- User Account Management

## 1.2 Reservation Management

Reservation management involves the handling of user reservations, including: viewing current reservations, marking reserved items as returned, and notifying users with overdue rentals. In order to access all reservation management operations, from the top toolbar, click on the ***Manage Reservations*** tab. All operations from Reservation Management can be accessed through this tab.

### 1.2.1 Viewing Current Reservations

Upon clicking on the ***Manage Reservations*** tab, all current reservations should be visible

### 1.2.2 Marking Reserved Items as Returned

When a rented out item has been physically returned, the administrator may mark this item as returned. Marking the item as returned will delete the reservation from the table mark the inventory item as available to rent again. In order to mark a specific rented item as returned, click on the ***Mark as Returned*** button on that specific reservation's table entry.

### 1.2.3 Notifying Users with Overdue Rentals

If a user still has an item held past the due date (by default this is two weeks after the reservation is made) then the ***Overdue*** column in the reservation's table entry should be marked 'Yes'. To send an email reminder to all users with an overdue item, click on the ***Notify*** button below the table of reservations. A confirmation box should pop up. Click 'Yes' in order to send the emails.

## 1.3 Donation Management

Donation management involves the handling of incoming donations, including: viewing incoming donations, accepting donations, and rejecting donations. In order to access all donation management operations, from the top toolbar, click on the ***Manage Donations*** tab.

#### 1.3.1 Viewing Current Donations

Upon clicking on the ***Manage Donations*** tab, all current donations should be visible

#### 1.3.2 Accepting Donations

To accept a donation, go to that donation's entry in the table and click on the ***Accept*** button. Upon accepting an item, this item will automatically be added to the inventory

#### 1.3.3 Rejecting Donations

To reject a donation, go to that donation's entry in the table and click on the ***Reject*** button. Upon rejecting an item, this item will deleted from the donations list

### 1.4 Special Request Management

Special Request management involves the handling of incoming special requests. In order to access all donation management operations, from the top toolbar, click on the ***Manage Requests*** tab.

#### 1.4.1 Viewing Current Special Requests

Upon clicking on the ***Manage Requests*** tab, all current special requests should be visible

#### 1.4.2 Accepting/Rejecting Special Requests

To accept/reject a special request, go to that request's entry in the table and click on the ***Accept*** or ***Reject*** button. Upon accepting/rejecting the user who made the special request will be notified via email, and the special request will be deleted from the table of special requests.

### 1.5 User Account Management

User Account Management allows the admin to access and edit user accounts, including allowing the admin to grant other . In order to access these operations, from the top toolbar, click on the ***Account Management*** tab.

#### 1.5.1 Viewing Registered Users

Upon clicking on the tab, all users should be visible. To get a detailed view of an individual user, click on the that user's ***Show*** button.

#### 1.5.2 Editing User Attributes

To edit the attributes of a user, click on that user's ***Edit*** button. This will take you to a edit form where you can edit the attributes of the user. To submit the edits made, click on the ***Edit*** button at the bottom of the form.

### 1.5.3 Granting Admin Privileges

An admin may grant another user admin privileges by going to the user's edit page by clicking their ***Edit*** button. In the edit form, set the property ***Adminpriv*** to a value of 1. To revoke admin privileges, set the value to anything other than 1. This feature should be used ONLY in the case where an additional admin is required.

## 1.6 Reports Pages

The reports section of the website allows the administrator to view a variety of information being stored by the system. To navigate to the reports page [rest of instructions to navigate]. The main reports page will present the administrator with a reports menu including most of the possible report types that can be generated. Select an item from the menu to view the report. When a report is selected, the report will be shown along with the menu so that the administrator can choose a different report at any time.

**Reports Menu options:**

1. All Users: Generates a report displaying all users, including both administrators and regular registered users. This report also includes options to generate reports showing the rental history and donor history for a certain user.
   Click the Rentals link on a user row to generate a report showing the rental history of that user.
   Click the donations link on a user row to generate a report showing the donation history of that user.
2. Administrators: Generates a report displaying all system administrators. This report also includes options to generate reports showing the rental history and donor history for a certain administrator.
   Click the Rentals link on a user row to generate a report showing the rental history of that user.
   Click the donations link on a user row to generate a report showing the donation history of that user.
3. Registered Users: Generates a report displaying all regular users of the system. This report also includes options to generate reports showing the rental history and donor history for a certain registered user.
   Click the Rentals link on a user row to generate a report showing the rental history of that user.
   Click the donations link on a user row to generate a report showing the donation history of that user.

4. All Inventory: Generates a report displaying all inventory items, including items available to rent, items currently rented, donations waiting for possible administrator approval, and donations that have been accepted but have not yet been delivered.
5. Available Inventory: Generates a report displaying inventory items that are available to be rented.
6. Currently Rented Inventory: Generates a report displaying all inventory items that are currently being rented to user.
7. Pending Donations: Generates a report displaying donations that are waiting to be possible approved by the administrator.
8. Special Request: Generates a report displaying all special request for items that are not yet in the inventory.
9. All Rental History: Generates a report displaying all item reservations that have ever been made.
10. Donations Pending Arrival: Generates a report displaying donations that have been approved by the administrator but have not yet been delivered by the donor.