



Introduction

The purpose of this module is to keep an extra eye on your bookable resources so that their current location is known at all times. In particular, this will reduce the amount of investigating required should an item go missing as you will have an accurate record of i) who had the item last ii) when it was passed to them.

Note: This feature is only relevant to resources that, when not in use, are stored in a specific location. Additionally, somebody within that location will need to be available to log when an item is collected for a booking, and also when it has been returned.

Typical example of use:

You have 5 digital cameras stored by the IT Department.

When a camera is booked, the booker needs to collect it from the IT Department. A member of the IT Department then logs it out.

Once the booking is complete, the booker needs to return it to the IT Department. A member of the IT Department then logs it back in.

The day to day usage of this feature is very quick and simple and involves little more than somebody clicking a button whenever a resource has been collected or returned. However, please be aware that it relies on all collections/returns being logged as soon as possible (ideally, at the same time it occurs). If the logging for even a single booking is ignored or delayed for too long, it not only defeats the purpose of the feature, but may require the tracking of that resource to be reset.

Addition

Tracking is a new optional extra within SchoolBooking and is not part of the core booking system (i.e. whether you use it or not has no effect on other parts of the system). Depending on its usage, we will be looking to expand it in the future to include additional features such as staff signatures being required on collection, email reminders if an item is not returned in time, comments on the condition of the item as it is returned etc .



Resource Tracking Admin Setup

When visiting the Tracking module in the Administration area for the first time, a general introduction page is displayed...

The 'To select your first item, click here' link takes you to the Resource Selector page...

The display will be mostly empty - other than a single drop-down menu near the top of the page.

In the drop-down menu, select a resource that you wish to activate for Tracking and then click on the grey Yes button. A new area will appear onscreen with the heading 'Tracking Settings'.

There are three settings to populate...

Tracking Start

This is the date that bookings for this resource should begin to include a tracking record.

Tip: In most cases, you should select a start date of tomorrow or later. However, if you are just evaluating this feature and want to see it in action straight away, you can select today's date (and change this setting later if required).

Resource Location

In this field, type in the place where the item should be collected/returned (e.g. IT Department, Reception Desk, Main Office etc).

Trackers (non-admins)

These drop-down menus refer to which members of staff are able to log the collection/return of the resource.

note: SchoolBooking administrators are able to view and log the collection/return of all trackable resources. Therefore, at present, only non-admins have to be listed here.

When ready, click on the Save button.

Resources - Tracking Back

Selected Resource: Silverhill iPads Track this item?

Tracking Settings

Tracking Start: 27 February 2015

Resource Location: IT Department

Trackers: Begum, Sanjida; Bodman, Hayley; Evans, Theresa

In the drop-down menus above, select up to six users who are responsible for the collection and return of this resource.

If you have other resources that you wish to include for tracking, select the next item in the list and repeat as before.

When all applicable resources have been activated, click on the 'Back' link in the top-right corner of the page to return to the main tracking index.

Resources - Tracking Admin Home

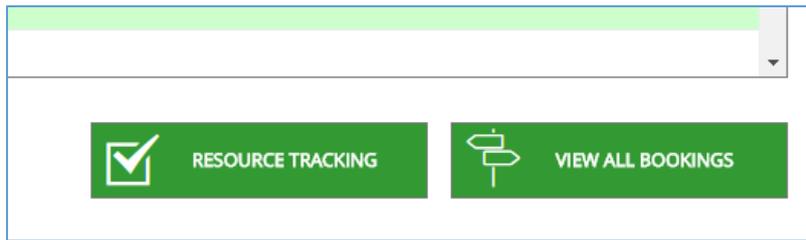
This optional module enables resources that require collecting/returning from a specific location to be closely monitored. For further details, click here to download the full Tracking Guide.

The following resources are currently being tracked...

Resource	Track From	Trackers
Minibus - GV61 HMF	27 Feb 2015	Mark Baker, Lee Colbran
Minibus - LS13 XOY	27 Feb 2015	Mark Baker, Lee Colbran
Silverhill iPads	27 Feb 2015	Sanjida Begum, Hayley Bodman, Theresa Evans

The page will now include a table showing all resources activated and the relevant dates/trackers. Should you need to change any settings later, click on the resource's row to revisit the setup page.

This concludes the administration setup. On the home Dashboard you will now see a 'Resource Tracking' button in the lower-right area of the page.



This module will be available to...

- All SchooBooking administrators.
- Any other users that have been assigned as a Tracker to a resource.

Notes:

If you selected a Tracking Start Date of today or earlier, you may already see multiple entries showing that a resource is due for collection. As using today's date is intended for testing/evaluating only, you will need to imagine that it is first thing in the morning and bookings for today have yet to begin. Once you are ready to use the Tracking module properly, it is recommended that you return to the admin area and move the Tracking Start Date on to tomorrow.

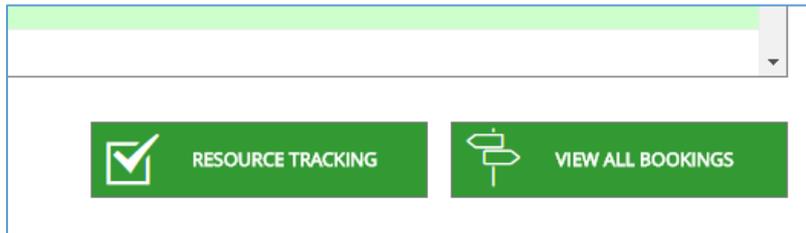
If the user is a SchoolBooking Admin, the first page of the main Tracking module will include all resources awaiting a collection or return.

If the user is not an admin, only resources where they are recorded as a Tracker will be included.



ROOM, RESOURCE
AND LETTINGS MANAGEMENT

Resource Tracking Day to Day Usage



Whenever a resource is collected or returned by a booker, the Resource Tracking module should be visited as soon as possible.

Access to this module is available via a green button on the lower-right area of the Dashboard home page.

On visiting the module you will be presented with two tables...

Resource Tracking

There are currently 4 resources being tracked. [View](#)

Resources awaiting collection (click the relevant row to update) Include tomorrow's bookings?

Resource	Qty	Booked By	Booking Start	Booking End
Minibus - GV61 HMF	1	Mrs G Jones	Sun 1 Mar 2015 @ 08:00	Sun 1 Mar 2015 @ 10:00
Laptop	3	Mr J Smith	Sun 1 Mar 2015 @ 12:00	Sun 1 Mar 2015 @ 14:00
Minibus - GV61 HMF	1	Mr D Black	Sun 1 Mar 2015 @ 14:00	Sun 1 Mar 2015 @ 19:00

Resources awaiting return

Resource	Qty	Booked By	Booking Start	Booking End
There are no resources awaiting return				

The first table will list all upcoming bookings where an item has not yet been logged as collected.

The lower table will list all bookings where an item has been collected - but has not yet been returned.

Tip: By default, entries will not appear in the top table until the date that the booking takes place. Should the booker arrive on the evening before to collect the item (e.g. their booking is first thing the next morning), tomorrow's bookings can be included via the tickbox in the top-right corner of the table.

Additional Information

Continuous Date Bookings

When a resource is booked by the same person over multiple days, each day is logged as a completely separate reservation within Schoolbooking.

Example

Mr Smith books a laptop for all day (8am to 10pm) on Tuesday, Wednesday, and Thursday. Within the booking records, these will show as three separate bookings.

Rather than force three separate return/collection logs to be completed, the Tracking module will merge these bookings into one so that they now show as a single booking for Tuesday 8am to Thursday 10pm.

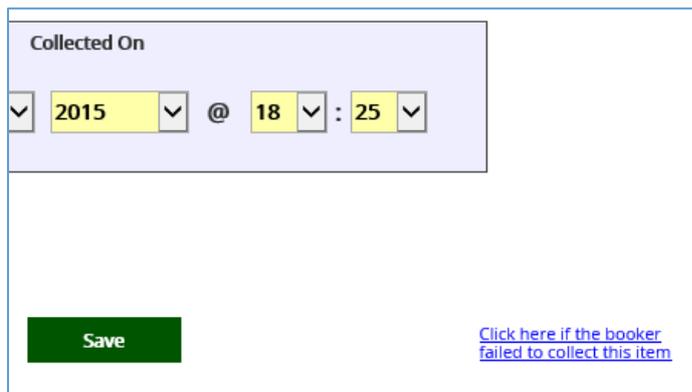
This type of merging will occur whenever a booking...

- i) Has an end time that matches the latest possible booking time for the day.
and
- ii) Is repeated (same item/quantity/booker) at the earliest booking time on the next day.

Please note that any gaps between bookings will break the chain and these will not be merged.

If the booker fails to collect the resource.

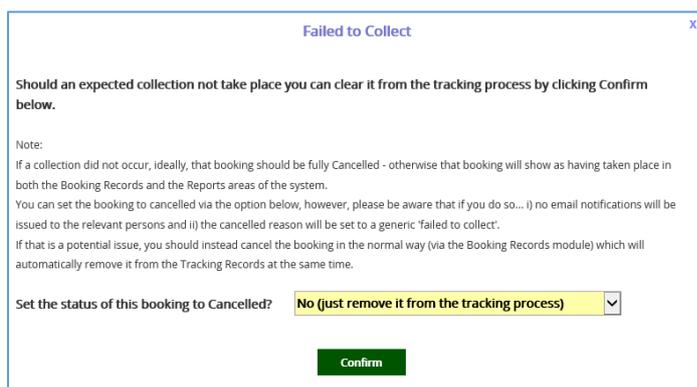
To clear a tracking record for a booking that did not take place, ideally the booking should be fully cancelled via the Book Records pages. Alternatively...



The screenshot shows a form titled "Collected On". It contains a date and time selection interface with dropdown menus for the year (2015), month (18), and day (25). Below the form is a green "Save" button and a blue link that reads "Click here if the booker failed to collect this item".

Select the booking in the To Be Collected table to open its pop-up window.

In the bottom-right corner of the display is a 'click here' link.



The screenshot shows a dialog box titled "Failed to Collect" with a close button (X) in the top right corner. The text inside reads: "Should an expected collection not take place you can clear it from the tracking process by clicking Confirm below." Below this is a "Note" section with three lines of text explaining the process and consequences of cancelling. At the bottom, there is a question "Set the status of this booking to Cancelled?" followed by a dropdown menu with the option "No (just remove it from the tracking process)" selected. A green "Confirm" button is at the bottom center.

From here you can either cancel the booking (but with limited options) or leave the booking open and just remove it from the tracking records.

Overview and History Page

The front page of the Tracking Module is solely concerned with logging the collection/return of resources. If you wish to view the tracking records in greater detail, there are two additional pages available....

Please note: These two pages rely on the collections/returns for your resources being completely up to date.

Near the top of the display click on the green View button.



A new page will be displayed.

Resource	Quantity	Current Location
Laptop	3	B5
Minibus - GV61 HMF	1	Mrs G Jones, Mr D Black
Minibus - LS13 XOY	1	Main Office
Silverhill iPads	20	IT Department

This Overview page will list all resources that have a tracking record and is a quick way to see exactly where an item is currently located.

Clicking on a row will take you to that resource's History page...

Booker	Qty	Book Start	Book End	Date Collected	Date Returned
Mr J Smith	1	2 Mar 2015 @ 07:00	5 Mar 2015 @ 20:00	Failed to Collect	Failed to Collect
Mr D Black	1	1 Mar 2015 @ 14:00	1 Mar 2015 @ 19:00	1 Mar 2015 @ 13:45	2 Mar 2015 @ 08:00
Mrs G Jones	1	1 Mar 2015 @ 08:00	1 Mar 2015 @ 10:00	1 Mar 2015 @ 07:50	1 Mar 2015 @ 10:30

From here you can view the tracking records for all bookings that have taken place over the past six months (or since tracking began if that is sooner).