The Equipment Reservation System (ERS) allows Marshall students, faculty, and staff to reserve AIS equipment online through the Equipment Reservation widget within MyMarshall and MTS staff to check equipment in/out and maintain a historic record. This guide is for MTS clerks who will need to prepare equipment and check it in and out to users. For instructions on adding or removing equipment from the system, see the ERS Admin Guide. The basic reservation, check-out / check-in process is outlined below.

End User Makes Reservation

The end user creates a reservation for equipment using the Equipment Reservations widget within MyMarshall.

MTS Clerk Checks ERS Daily for Reservations

The MTS clerk uses the ERS Clerk Tool widget located within MyMarshall to view any reservation requests for a specific day so they can prepare the equipment for the end user’s scheduled pickup date.

Print Item Prep Sheets (MTS)

The MTS clerk uses the ERS Clerk Tool to print out Reservation Preparation Sheets for each item reserved for the day. Note that prep sheets can be printed individually as well.

MTS Clerk Preps Equipment.

MTS Clerk prepares the reserved equipment to be picked up and attaches the prep sheet to it.

Item’s Status set to Ready (MTS)

Once an item has been prepared, the MTS clerk uses the ERS Clerk Tool widget to mark the item as "Ready" for pickup.

User Picks up Equipment & Signs Sheet

MTS files signed Reservation Sheet and uses ERS Clerk Tool to mark item as being checked out.

User Returns Equip.

MTS Clerk uses ERS to mark item as “Returned” and user receives confirmation email.

User Fails to Show

Delete Reservation

MTS Clerk uses the ERS Clerk Tool to delete the reservation thus making the item available for others to check out.
Marshall students, faculty, and staff can reserve equipment through the Equipment Reservations widget which is available while logged into MyMarshall.

After specifying a category, type, and pickup/return date, ERS will let them know if the equipment is available or not.

If the equipment is available, ERS will mark an item as reserved and not allow others to reserve the same piece of equipment during the same period.

MTS clerks can view reservations by accessing the ERS Clerk Tool also located within MyMarshall.

Notes:
- An item cannot be reserved on the same day it is scheduled to be returned. There is a 1 day buffer between return dates and reserve dates.
- When a user selects a Category and Type, the system will reserve the next available item in the type and remove its bar code from the list of available items. For example, if a user selects “Laptops” and “Macbook” as the category and type, and there are three Macbooks available, ERS will remove one of them from the list of available Macbooks by bar code.
Preparing and Checking Out Reserved Equipment – MTS

The steps in this section walk the MTS clerk through the process of:

- Viewing Scheduled Reservations.
- Readying Equipment.
- Printing out Request Sheets.
- Checking Out Equipment.
- Checking in Equipment.

Step A: Viewing Reservations
Any reservations a user has made using the Equipment Reservations widget within MyMarshall, will appear in the ERS Clerk widget. It is up to the MTS clerk to check the ERS Clerk widget on a daily basis for equipment going out the next day and have it ready for pickup. The steps in this section cover how to check for reservations.

2. Locate the widget: ERS - Clerk Tool
3. Check “by date for inventory prepping”.
4. Specify a date using the date picker.
5. Click “Lookup Rentals”.

All items scheduled to be checked out for the date you specify will be listed. (If desired, you can filter by location.)

Note that if a reserved item is currently checked out, its barcode will be in red and it will have an exclamation mark to its left.

Overdue Items
If the reserved item has not been returned on time by its previous borrower or is due back one day before the next check out, you have a couple of options:

Select the Same Item but with a Different Bar Code
1. Right click the item.
2. Select “Find alternative Item”.
If a similar item is available, ERS will update the Bar Code automatically.

Contact the Renter
1. Right click the item.
2. Select “Edit / View Details” to view the renter’s email address and contact them.
Step B: Printing Reservation Prep Sheets & Readying Equipment

Once you have ascertained the requests for the next day and have verified that the equipment is indeed available, you will need to do two three things:

- Print out a Reservation Prep Sheet for each reservation.
- Prepare the Equipment for checkout. (i.e. verifying it is working and all accessories are there.)
- Mark the reservation as “Ready” in ERS.

Printing out a Reservation Prep Sheet

The purpose of a Reservation Prep Sheet is twofold: first, it will be attached to the equipment being prepared so that the equipment can be easily identified when the render picks it up; and second, it will be signed by the renter and filed by MTS to act as a record that they took position of the equipment.

1. Complete the steps in the Step A.
2. Right click within the rentals window and select “Print all Rentals”.

Note you can also print individual rentals by selecting “Print this Rental”.

3. Attach each prep sheet to its corresponding reserved item.

For each item that has been prepared and has a prep sheet attached, you will mark as “Ready” in ERS.

4. Right click a reservation.
5. Select “Set as Ready”.
6. Type any notes and click “Set”.

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Step C: Equipment Check Out
When the renter arrives to pick-up their equipment, the MTS clerk will need to do four things:

- Have the renter sign the Reservation Prep Sheet.
- Give them the equipment.
- Mark the reservation as Checked Out.
- File the Reservation Prep Sheet.

1. Because the person who made the reservation may not always be the person sent to pick the equipment up, it is important that you do three things:
   a.) Verify their identity with picture ID.
   b.) Have them PRINT their name on the prep sheet.
   c.) Have them sign the Prep sheet.

2. Once they have signed the prep sheet, give them the equipment.

You must also specify in ERS that the item has been checked out. To find the person’s reservation, you can either search by their username or by reservation date.

3. Select “by username” (or “by date for inventory prepping”).
4. Type the search criteria.
5. Click “Look Up Rentals”.

6. Right click the item.
7. Select “Set as Checked Out”.

*Note that only items in the “Ready” state can be checked out. If an item is still in “Reserved” state, you must first take it to “Ready” state before you can check it out.

If you did a search “by username”, the mode indicator will change to “CHK'D OUT”; if you did a search “by date for inventory prepping”, the item will disappear from the list.

Step D: Checking In Equipment
When a user returns a piece of equipment, you will need to do two things:

- Use the ERS Clerk widget to list the item as well as any kit or accessories which were check out with it.
- Check the item back in.

1. Access the ERS – Clerk Tool.
2. Click “by username”.
3. Type the person’s username.
4. Click “Lookup Rentals”.

Items they currently have checked out will have the “CHK’D OUT” mode indicator.

5. Right click the item and select “Edit / View Details”.

Any kits or accessories associated with the rental will be listed below.

6. After comparing what was returned with what is in ERS click “Close Detail View”.

7. Right click the reservation again and select “Set as Returned”.

8. Select a Return Condition (Good, Damaged, Lost, Incomplete) and enter any notes you feel are needed.
9. Click “Set”.

The mode indicator for the rental will now read “Returned” and the renter will receive an email confirmation.
Deleting Reservations No-Shows - MTS

Items which were reserved but never picked up will remain in the “Rentals For” window until they are deleted by an MTS clerk. For example, if you are viewing rentals for April 2, an item which was reserved for March 15 but never picked up will still appear in the rentals for April 2\textsuperscript{nd} window.

If you are sure it is okay to delete a reservation, you can do so by following the steps below. Note that only reservations in the “Reserved” or “Ready” mode can be deleted.

2. Locate the widget: ERS - Clerk Tool
3. Check “by date for inventory prepping”.
4. Specify a date.
5. Click “Lookup Rentals”.

6. Right click the reservation.
7. Select “Delete Reservation”.
8. Click “OK” to confirm the deletion. Note you cannot undo a deleted reservation.
Checking Out Equipment: Unplanned Walk-ins

This section goes over the steps on how to check out a piece of equipment for someone who walks in without a reservation. The basic steps are:

Lookup Username → Make Reservation → Specify the Item → Set as Ready → Print Receipt → Set as Checked Out

1. Open the ERS Clerk Tool.
2. Click “by username”.
3. Type the person’s username and click “Lookup Rentals”.

4. Click “Make a Reservation”.

5. Select the “Category”.
6. Select the “Type”.

7. Specify a “Pickup” and “Return” date/time.

8. Specify the location.
9. Click “Reserve”.

If there is no matching equipment available, the system will notify you; otherwise, the message shown to the right will appear confirming the reservation.

Your next steps are to ready the equipment and check it out.

10. Click “View Rentals”.

ERS - CLERK TOOL

Example
All items the user has reserved will be listed.

11. Right click the item.

12. Click “Set as Ready”.

13. Type any notes and click “Set”.

14. Right click the item again and select “Print this Rental”.

15. Click “OK” to print.

16. Have the person sign the printout then file it.

17. Right click the reservation again and select “Set as Checked Out”.

18. Type any notes and click “Set”.

The item’s status indicator should now display as “CHK’D OUT”.

The item is now checked out to the person.