The Equipment Reservation System (ERS) allows Marshall Community members to reserve AIS equipment online through the Equipment Reservation widget within MyMarshall and AIS staff to check equipment in/out and maintain a historic record. This guide is for AIS administrators who need to input equipment into the system and manage it so it can be checked out. For instructions on how to see what has been reserved and check inventory in and out, see the “Equipment Reservation System - Clerk Guide”.

The ERS Administration system contains the following features:

- **Create Equipment Categories & Types (Manage Categories)** – This allows you to create categories and subcategories (types) that equipment is placed into making it easier for the end user to find and reserve items.

- **Input New Inventory (Manage Items)** – This allows you to enter new items into the system thus giving you the ability to check it in/out, track it, and specify its status.

- **Manage Item Availability** – This feature allows you to specify whether an item is allowed to be check out or not. For example, it may be out for repairs or discontinued.

- **Combine Multiple Items into a Single Checkout Product** (Kits & Accessories) – This feature allows you to group multiple items into a single checkout product. For example, when a user checks out the item “Laptop”, they also get a power cord, mouse, and bag.

- **Track an Item’s History** – The system maintains a log for each item including who checked it out, when it was checked out, when it was returned, and its repair history.

- **View an Item’s Current Checkout Status** – This allows you to view the current status of a specific item. For example, “Reserved”, “Rented”, or “Returned”.

---

**ACCESSING THE ADMINISTRATION VIEW OF ERS**

The ERS Administration system is accessible through MyMarshall. To access it, follow the steps below.

2. In the Marshall Explorer widget, do one of the following:
   a. Type “ERS” in the search box.
   b. Then click “ERS Admin”

   or

   a. Click “Services” to expand it.
   b. Then click “ERS Admin”.

© Marshall School of Business
CREATE EQUIPMENT CATEGORIES AND TYPES

To make it easier for users to find items they wish to reserve, they first select its category and then its type in that category. For example, if they are looking to reserve a laptop, they would select “Laptops” from the category list and then select “IBM Thinkpad”, “Macbook”, or “Netbook” from the type list.

Prior to adding any inventory into ERS, the administrator most first create the categories and subcategories (types) that items are classified into. The steps below and on the next page cover how to create categories and types.

**Step A: Adding a New “Category”**

1. Click “Manage Categories”.
2. Click “Add New Category”.

   ![Manage Categories](image)

   This is a list of categories you have already created.

   ![Add New Category](image)

   ![Edit an Existing Category or its Types](image)

   ![Delete a Category](image)

   The pencil allows editing of an existing Category or Type.

   The red X deletes an existing Category. Note you cannot delete a category which contains types or contains inventory items.

3. **Category Display Name:** What you type here appears on the Categories drop down list for the end user.

4. **Description:** What you type here appears for the end user once they have selected a category.

5. Click “ADD”.

6. Repeat steps 2-5 to make more categories.
Step B: Adding a New “Type”
Now that you have created a “Category”, you can populate it with “Types”. Follow the steps below to add or edit a category’s “Types”.

1. Click “Manage Categories”.
2. Click the pencil icon next to the category you wish to add types to or edit.

All of the controls within this section are for editing a Category. Types are added and edited within the tan area below.

3. Click “Add New Type”.
4. Enter a display name at “Type Display Name”. The user will select this to reserve a piece of equipment.
5. Check which users can rent this type.
6. Enter a “Description”. The description appears for the end user once they have selected a type.
7. Max Check Out Days – Enter the maximum number of days items of this type may be checked out.
8. Click “ADD”.
9. Repeat steps 3-8 for any additional types.

Edit / Delete Types
- **Edit** - You can edit a Type by clicking the pencil icon to its right.
- **Delete** - You can delete a Type by clicking the red X to its right. Note that you cannot delete a type which contains inventory.
MANAGING ITEMS (INVENTORY FOR CHECKOUT)

Once you have created a category and type for an item, you can input the item’s information into ERS. For example, if you created a type called “Macbook”, you can now begin inputting the specific Macbooks models into that type.

1. Click “Manage Items” from the left menu.
2. Click “Clear Item Editor”.

**Edit an Existing Item**

This area is used to search for and edit an existing item and is not used when adding new items. It will be covered on the next page.

**Adding a New Item**

3. Use the screen to the right to add new items to inventory. Fields with a red asterisk * are required. Most are self explanatory and the ones which are not are covered below.

   - **Category** – Select the item’s category.
   - **Type** - Select the item’s type.
   - **Barcode** – This field is scanner enabled. To input the Barcode you can either type the numbers manually or use a scanner to input it for you. To use a scanner, tab to the “Barcode” field and then scan the item.
   - **Serial #** - This is found on the item.
   - **Asset #** - See your manager for instruction.
   - **Status** – Set this to “Available” to make the item available for checkout. Setting it to “Hold”, “Repair”, “Decommissioned”, or “Lost” removes it from checkout availability.

4. When complete click “Add Item”.
**Editing an Item**

Should you need to edit an item, you will need to supply either its Barcode or Serial number to view its information. You can enter either of these by manually typing them in or use a scanner to input the Barcode.

1. Click “Manage Items” from the left menu.

2. Select “Barcode”, “Serial”, or “Asset Number” depending upon how you wish to search for the item.

3. Type the Barcode or Serial number depending upon your choice above; or, if you selected “Barcode” and have a scanner, scan the item.

4. Click “Lookup Item”.

5. Make your edits.

6. Click “Update”.

---

**PACKAGING ITEMS TOGETHER: KITS AND ACCESSORIES**

When a user checks out an item, there are often other related items that they may also need. For example, they request a Macbook; they may also need a power cord, external mouse, etc. The ERS administrator can package these things together as a single product so that when a user selects “Macbook”, the other items are checked out to them as well. There are two methods of packaging items: Kits and Accessories.

- **Kits** – When packaging as “kits”, all items in the package must have barcodes and must be entered into ERS as shown on the previous page. Note that if you do add an item to a kit, it can no longer be checked out as a single item.

- **Accessories** - Like “Kits”, this is a method of packaging items; the difference is the additional items included in the package do not have bar codes and are not entered as shown on the previous page. For example, being that all laptops need a power cord, you may not want to bar code the cord but you do wish to track the fact that it is part of the check out package so you include it as an “Accessory”.

---

---

---
Creating a Kit
To package bar coded items into a package, follow the steps below.

1. Click the “Manage Items” button.
2. Use the search box for the item you wish to include accompaniments with. (See “Editing an Item”.)

3. Click “Make into a Kit” located on the “Kit” tab.
4. Click “Add Item to this Kit”.
5. Select “Barcode” or “Serial”.
6. Either type the barcode or serial number for the item you wish to add to the kit. (Or if you selected Barcode, scan the item.)
7. Click “Add”.

The item is now part of the kit.

Add More Items to the Kit
To add additional items to the kit, click “Add Item to this Kit” again.

Remove an Item from the Kit
To remove the item from the kit (but not inventory), click the red X.
Add / Remove Items to a Kit or Delete a Kit
To add items to a kit, remove items from a kit, or delete a kit, follow the steps below.

1. Click the “Manage Items” button.
2. Use the search box for main item which has a kit associated with it. (See “Editing an Item”.)

### Adding More Items
Click “Add Item to this Kit” to add more items to the kit.

### Remove Item from Kit
To remove the item from the kit (but not inventory), click the red X. Once you have deleted all items from a kit the kit is deleted.

Note that you can also remove an item from a kit it is in by searching for the item in the kit.

For example, BlueRay Player is part of the Inspiron Kit we made earlier. If we search on the BlueRay Player, the kit it is part of is indicated as shown.

**Important Notes about Items in Kits**
- They system will not allow you to assign the same item to more than one kit. If you do assign an item to a second kit, ERS it will automatically remove it from the first kit and add it to the second. For example, you assigned an external mouse to a kit for an IBM laptop. Later you assign the same exact mouse to a kit for a Dell laptop. The system will automatically remove it from the IBM kit and place it in the Dell Kit.

- Users cannot reserve items which are assigned to kits. For example, if you allow your users to reserve power cables but all your power cables are parts of kits, then they will not be able to reserve a power cable.
Creating Accessories
Like “Kits”, this is a method of packaging items; the difference is the additional items included in the package do not have bar codes and are not entered into ERS as items. For example, being that all laptops need a power cord, you may not want to bar code it but you do wish to track the fact that it is part of the check out package so you include it as an “Accessory”.

1. Click the “Manage Items” button.
2. Use the search box for the item you wish to include accessories with. (See “Editing an Item”.)
3. Click the “Access…” tab.

4. Click “Add Accessory”.

5. Type a name for the accessory.
6. Click “Add”.

Edit / Remove Accessories from an Item
To edit an item’s accessory list, follow the steps below.

1. Click the “Manage Items” button.
2. Use the search box for the item whose accessories list you wish to edit. (See “Editing an Item”.)
3. Click the “Access…” tab.

Add more Accessories to an Item’s List
Click “Add Accessory”.

Edit an Existing Accessory
Click the pencil to edit an existing accessory.

Remove an Accessory
Click the red X to remove an accessory.
**TRACK AN ITEM’S REPAIR HISTORY**

This feature allows you to record any repairs which have been made to an item.

1. Click the “Manage Items” button.
2. Use the search box for the item you wish to include accessories with. (See “Editing an Item”.)
3. Click the “Repairs” tab.

4. Click “Add Repair to Item”.

5. Specify an “Out Date”.

6. If at this time you have an In Date, Cost, and any Notes, type them as well; otherwise, you can add them later.

7. Click “Add”.

**Editing a Repair History**

When an item comes back from the repair shop, you should have the In Date and Cost and can input them as well. To edit an existing repair, do the following:

1. Follow steps 1-3 above.
2. Click the pencil next to the repair entry you wish to edit.
3. When done editing, click “Save”.

**Delete a Repair Entry**

1. Follow steps 1-3 above at the top of the page.
2. Click the red X next to the repair entry.
3. Click “OK” to confirm.
This feature allows you to view the current status of a piece of equipment; namely, if it is: **Reserved**, **Rented**, or **Returned**. Note that it is read only; if you need to check something in or out use the ERS Clerk application.

1. Click the **Manage Items** link on the left.
2. Select either **Barcode** or **Serial** depending upon how you wish to search for the specific item.
3. Either manually type the Barcode or Serial number (depending upon what you selected above) or select “Barcode” and use a scanner to read the item’s bar code.
4. Click **Lookup Item**.
5. Click the **Rentals** tab.

An example of what you might see is shown below.

**Status**
This tells you the item’s current state: **Reserved**, **Rented**, or **Returned**.

**Out**
This is the date it is schedule to go out or actually went out.

**In**
This is the date it is schedule to be returned or was actually returned.

**Location**
This is the location the user chose to pick the item up from.

**Customer Info**
This is the person who reserved the equipment and their email address. It appears when the mouse is over the Customer Info icon.

**Reason** – This is entered by the end user when the reserve the item.

**Notes** – These are entered by the AIS clerk who checks out the item to the user.

**View In/Out Dates**
Hover your mouse over the calendar icons to view the exact Out / In date and time.