

Adaptive Solutions

Presents



EQUIPMENT TRACKER©

Your Password: _____ (the password is not case sensitive).

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Introduction

Equipment Tracker© is an easy to use database that enables any agency (school district, state agency, or private organization) to track all equipment owned and utilized by the agency. It is basically a Microsoft Access database with all information stored in tables that can be linked to other tables to reduce data redundancy.

Equipment Tracker has a built in "check out/check in" system and records all equipment usage and maintenance. Equipment disposals may also be recorded. All equipment can be grouped into different categories for easier searches and reporting purposes.

Upon initial setup, it is important to give some thought to how Equipment Tracker will be used by the organization. There are several layers that can be used in organizing information. Firstly, agency information should be entered under Systems Settings. This information will be linked to the Sites and Patrons that are served by the agency. Up to 5 different agencies can be added. However, it is important to note that Sites, Patrons, and Equipment cannot be shared between agencies. This feature is great for a regional office tracking equipment usage for each local office.

Some thought needs to be given to Site Types. This is similar to Equipment Categories, where Site Types makes filtering, viewing, and printing specific Sites easier. An example of this would be if the local office served schools; then Site Types could be Elementary, Middle, and High School, with Sites representing the actual schools served.

After setting up the Agency(s) and Sites, equipment and each contact's personal information can be entered. This initial setup can be tedious, but will be well worth the effort in the long run.

System Requirements

Windows® 98, 2000, XP Home, XP Professional

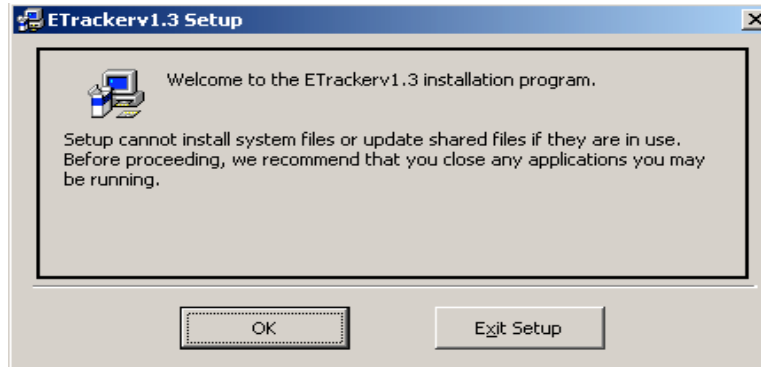
Minimum of 32MB RAM minimum - 17 MB Hard Drive Space for the program, Plus 52 MB for MS Access Runtime if Microsoft Access has not already been installed.

Legal Information

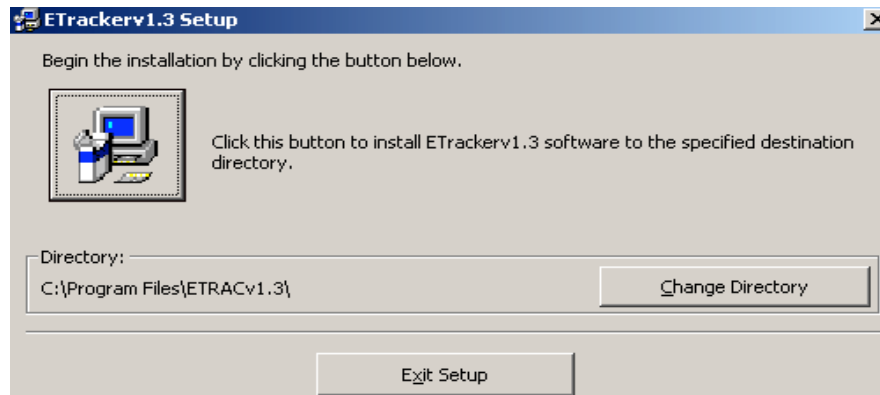
Equipment Tracker© is a copyrighted phrase by S. J. Hollingsworth and Adaptive Solutions, Inc. of Port Allen, Louisiana. Throughout the Equipment Tracker© software program and the instruction manual, this phrase is often used without being accompanied by the universal copyright symbol "©". Please be assured that it is indeed copyrighted and trademark-pending, and that Adaptive Solutions reserves all rights concerning any and all future uses. The distribution and sale of this software and manual are authorized for the original purchaser only. Unauthorized duplication is a violation of the federal copyright law.

Installation

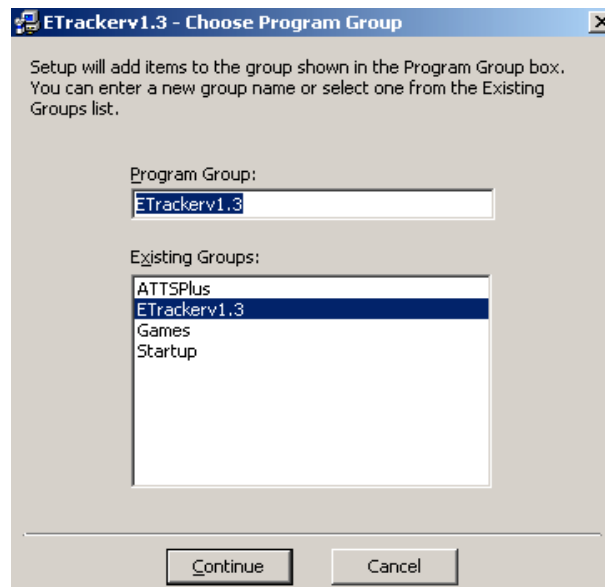
1. Insert the Equipment Tracker installation CD into the CD-ROM Drive.
2. The Equipment Tracker setup screen will appear. Click [OK].



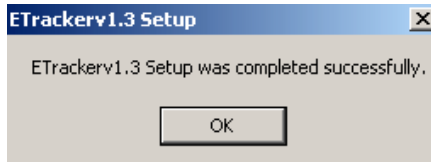
3. Begin by clicking on the computer icon button (do not change the directory file for the program).



4. The Choose Program Group screen will be next, select "ETrackerv1.3" under Existing Groups and click [Continue].



- When the installation is complete, a pop-up box will appear saying, "ETrackerv1.3 Setup was completed successfully". Click [OK].



!Note! *This application requires the Access 2000 Runtime program. It will load automatically if not already present in the system (this installation may take up to 5 minutes to start, please be patient). After it is installed the system should restart automatically and finish installing the Tracker application. If the system does not automatically restart, please manually restart the system to complete the installation.*

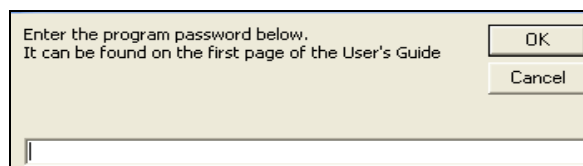
- Go to "Start", "Programs", and then to "ETrackerv1.3".

!Note! *When using the Office 2003 version of Equipment Tracker, a Security Warning may appear. This is a protection device provided with Access 2003. Since Equipment Tracker is basically an MS Access application, this warning is simply notifying you that Access cannot verify that the Equipment Tracker program came from a trusted source or that this version has not been tampered with by an unauthorized user. We can guarantee you that the Equipment Tracker program is packaged securely and that there are no viruses included! Click [Open] to continue.*

- The Equipment Tracker introduction screen will appear. Click [Continue].



- A screen will appear asking for the password (located on the first page of manual).



Program Standard Features

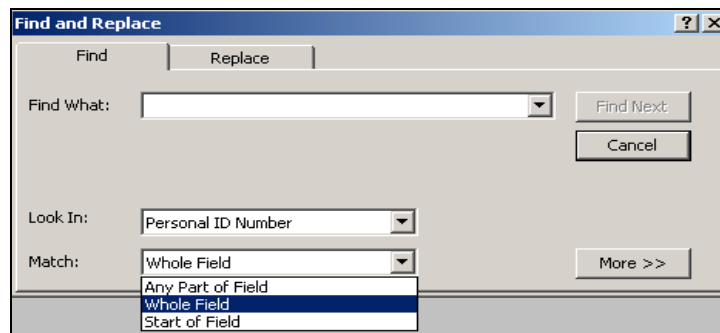
Equipment Tracker Toolbar

This toolbar is designed to be similar to other toolbars commonly used by most software programs. A description of each toolbar function is provided below.



1 2 3 4 5 6 7 8 9 10 11

1. Screen Size – This button will minimize, maximize, or close the screen.
2. Exit Program – This button closes the Equipment Tracker program.
3. Print – This button will print the record that is currently open and visible. Ensure to change the Print Range from “All” to “Selected Record(s)”.
4. Find – This button will search a field for the text string entered into the Find and Replace popup box.

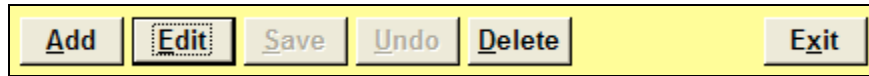


In the example above, the system is searching the Personal ID Number field, as noted in the “Look In:” field. Under the “Match” field select what type of “Find” function to use. “Any Part of the Field” is useful if the exact number is unknown. Enter which ever part is known and the system will find all records with that similar string. If the exact number is known, leave the default selection, “Whole Field”. If only the first few characters are known, use the “Start of Field” selection.

5. Copy – Highlight any field and click the Copy button on the toolbar, to copy that field for later use.
6. Paste – After copying a field and clicking on the Paste button, the information previously copied will be pasted to the current field.
7. Sort Ascending – This button will sort all records in ascending order according to the selected field. This can be useful in placing last names in alphabetical order or ID numbers in numerical order.
8. Sort Descending – This button performs the same function as above, only in reverse order.
9. Filter – This button will filter records according to the value or parameter entered in the selected field. For instance, if you wanted to view Touch Windows only; simply select the equipment category field, select Touch Window, and then click on the Filter button. The system will then only show Touch Windows.
10. Remove Filter – This button removes any previously entered filters and shows ALL records.
11. Close Report – Use this button to go back to the previous screen.

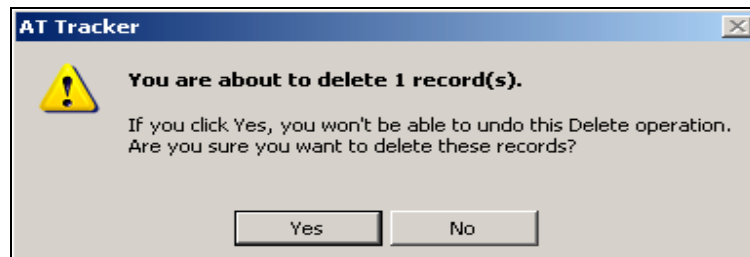
Control Buttons

When a maintenance form is opened, the data is view only. To add, edit, or delete a record one of the control buttons at the top of the form must be clicked. The small pop-up maintenance forms that have only 1 to 3 fields on them, such as Equipment Category or AT Team, do not have the [Edit] button because you may just click on a field and start changing the data in it. Also on these pop-up forms there is no need to save because the field is automatically updated as soon as you leave it.

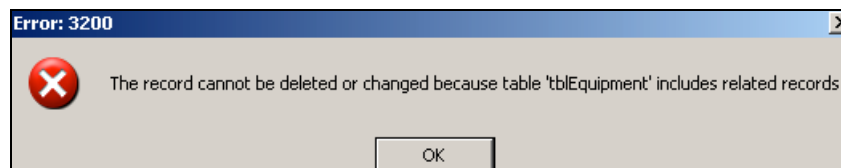


Below is a description of the control buttons' functionality:

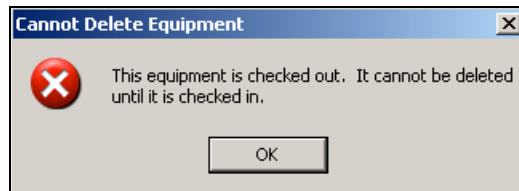
1. **Add** – Clicking the [Add] button will create a blank form for adding a new record.
2. **Edit** – The [Edit] button allows the user to edit existing information. Once the [Edit] button is selected, the [Save] and the [Undo] buttons will become active.
3. **Save** – The [Save] button MUST be clicked to ensure that all new information entered in any field will be stored before exiting that form. Do not assume that a record is saved unless the [Save] button becomes inactive once you click on it (sometimes you will need to click on it twice).
4. **Undo** – The [Undo] button allows the user to undo the last action that was entered.
5. **Delete** – The [Delete] button allows a user to delete the current record displayed on the screen.



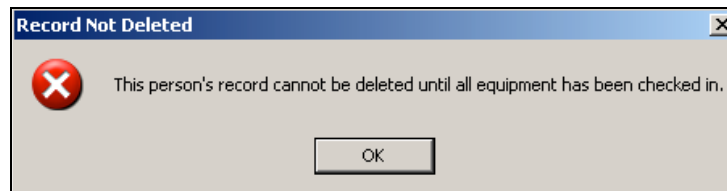
!Error! *Equipment Tracker will not delete an Agency record from the System Settings form if there are any records, such as Equipment or Patrons, entered under that Agency's ID. Instead the user will receive a message stating that the record cannot be delete.*



!Error! *Equipment records will not be deleted from the Equipment Inventory form if the equipment is still checked out to an individual. All equipment MUST BE CHECKED IN before that record can be deleted.*



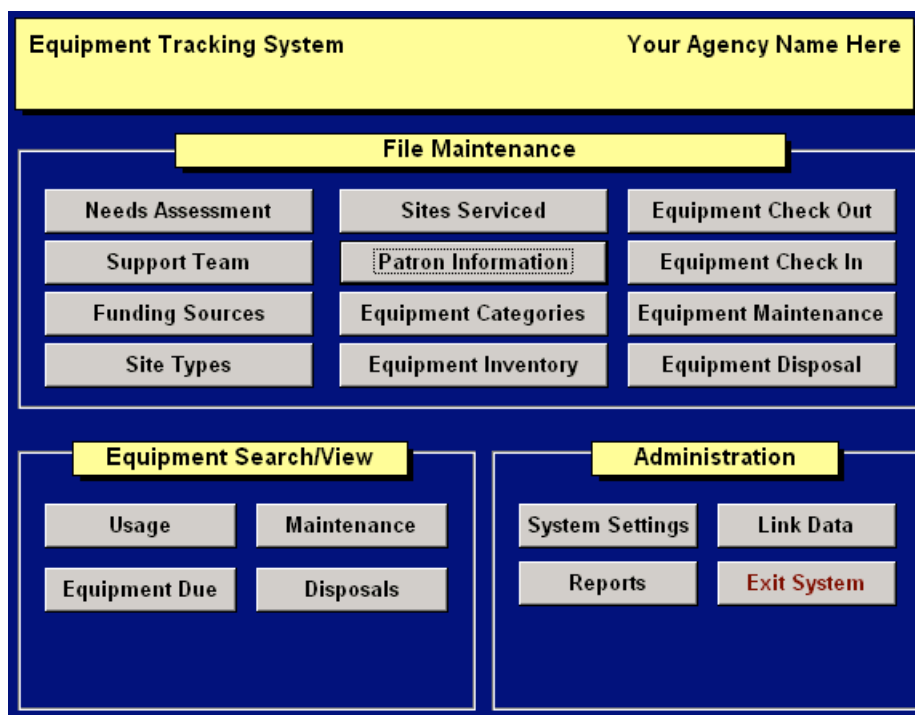
!Error! *A Patron record also cannot be deleted if equipment is checked out to the individual. If the individual has NO equipment checked out, then that record WILL BE DELETED along with ANY Referral, Assessment, or Tech Support/Training records for that individual.*



- 1. Exit – The [Exit] button brings the user back to the Main Menu.

Main Menu

After providing the correct password for the program, Equipment Tracker will open the Main Menu.



File Maintenance

1. Needs Assessment

This form records all requests for training and/or new equipment. Patron Information for the individual requiring services must be entered under Patron Information before adding a Needs Assessment record for them.

The fields on the *Needs Assessment* form are described below:

- a. Patron ID Number – This is a required field. It is a drop-down list of all Patrons previously entered.
- b. Patron Information – The Patron Information button will open a pop-up screen with the individual's information listed on it. This is 'view only' data.

- c. Assessment Number – This is a required number field set as a long integer. On the creation of new records this field will be populated with the next consecutive assessment number for the individual. However, this field can be overridden with a different number if the agency has a different numbering system in place. The number entered must be unique for the individual.
- d. Contact Date - Pre-formatted field for the actual date that services were requested.
- e. Site ID – Drop-down list of previously entered site information.
- f. Team Member(s) – Drop-down list of previously entered team members.

- g. Training Needed – This button should be checked if training is requested/needed.
- h. Equipment Needed – This button should be checked if equipment is requested/needed.
- i. Trainee – Name of the person that received training.
- j. Phone – Pre-formatted field for the trainee's phone number.
- k. Date Trained – Pre-formatted field for the date that the training was conducted.
- l. Team Member – Drop-down list of Team Members (previously set up).
- m. Notes – Memo field capable of over 250 characters. Enter any pertinent information regarding this request or the training provided.

2. Support Team

This form is used to enter the names of each AT Team Member that the agency utilizes, whether they are full-time employees or consultants. The name field is a text field and is limited to 40 characters.

Team Members			
Jane Doe			
Add	Delete	Undo	Exit

3. Funding Sources

This form maintains a list of the funding sources used to purchase equipment. This is a text field and is limited to 50 characters used on the Equipment Inventory form.

Equipment Funding Sources	
Medicaid	
Private Insurance	
School System	
Add	Delete Undo Exit

4. Site Types

The *Site Types* form is used to maintain a list of each type of location that is normally served by Assistive Technology Providers. Both fields are text fields, the Code field is limited to 2 characters and the Description field is limited to 50 characters.

Site Type Codes	
Code	Description
E	Elementary
H	High School
M	Middle School
Add	Delete Undo Exit

!Note! All *highlighted (light green)* fields on all forms are required fields. These fields must have data entered into them before the record can be saved and the form can be closed.

!Error! If data is not entered in required fields, the following message will appear.



5. Sites Serviced

This form provides fields for the basic information about each specific site that will be served by the agency. This information is used on the Personal Information, Referral, Assessment, Tech Support, and Equipment Check Out forms.

Site ID 123	Site Name School Name, Center Name, etc.	Agency ID 1
Contact (Principal, Director, Manager, etc.) Contact Person's Name	Phone Number (225) 837-4534	Fax Number (225) 873-4534
Address Line 1 4321 Apple Street	Line 2 PO Box 4321	
City City	State LA	Zip Code 70817-4321
Country USA	Type E	

The Sites Serviced form contains the following information:

1. **Site ID** – This required text field is limited to 10 characters. If Site IDs are not already set up within the agency, a unique number will need to be assigned to each site.
2. **Site Name** – This is a required text field and is limited to 50 characters.
3. **ID** – This is also a required field. It is directly linked to the Agencies set up under System Settings.
4. **Contact** – Name of the head of the site, whether it be a principal, director, or manager. This is a text field and is limited to 40 characters.
5. **Phone Number/Fax Number** – Pre-formatted phone fields including the area code.
6. **Type** – Drop-down box of the Site Types previously entered.
7. **Address 1/Address 2/City** – All three of these fields are text fields limited to 30 characters.
8. **State/Zip** – All State and Zip Code fields are pre-formatted.
9. **Country** – All Country fields are text fields limited to 25 characters. This field may be used for other information, such as email addresses, if desired.

6. Patron Information

The Patron Information form has two tabbed sections. The first tab, "Personal Information", is used to enter basic information about individuals or agencies requiring services. The second tab, "Assigned Equipment", displays currently assigned equipment for the individual, as well as a history of previously assigned equipment. Each of the tabbed sections is explained below.

The *Personal Information* tab is for inputting the basic information of each individual receiving AT services and/or equipment. This information might be incomplete at the time of the initial request for equipment and/or services, but it should be added to and expanded upon as the individual receives continuing services from the agency.

Search by Number <input type="text"/>		Search by Name <input type="text"/>				
Patron ID Number 433848899	First Name Jane	Last Name Doe	Birth Date 12/11/1991	Age 12	Gender F	Print Patron Information
Site ID 123	School Name, Center Name, etc.					
Building Name/Number 6	Room No. 7	Contact Mrs. Watson				
If patron is a minor, name of parent/guardian John and Sally Doe			Daytime Phone (225) 112-4757	Evening Phone (225) 676-6777		
Address 1234 Main St.	City Happy Valley	State LA	Zip Code 70726-6543			
Comment comment about jane doe					Agency ID 1	

1. **Search by Number/Search by Name** – These two fields will allow a user to conduct a search either by Personal ID Number or by Name.
2. **Personal ID Number** – This is a required text field limited to 13 characters used for the Personal ID # (or Social Security Number) of the individual that has been referred. If Equipment Tracker is used in a school environment, a "T" could be placed in front of the id number to indicate a teacher vice student.
3. **First Name/Last Name** – Both of these are required text fields and are limited to 16 characters.
4. **Birth Date/Age/Gender** – These fields are self-explanatory. **The field for Birth Date is not updated annually, so the date that is initially entered will remain the same throughout the years unless otherwise changed.

5. **Print Personal Info** – The [Print Personal Info] button allows the AT Staff to conveniently print a hard copy of the information shown on the form for the individual.

Personal Information

Name: Person, Sample
Per 987654321
DOB: 6/10/1994
Gender: F
Parents: John and Sue Person
Address: 7465 Washington St.
 Baton Rouge LA 70817-
Country: USA
Home Phone: (225) 837-4548
Work Phone: (225) 755-9487
Site: School Name, Center Name, etc.
Room N 6
Contact Mrs. Jackson
Exceptionalities: AU DD HI
Evaluation Date: 02/16/2004
Re-Eval Date: 02/16/2007 **Re-Eval Comment:** last re-eval date was 3/12/02
AT Service Provider Rebecca Smith
Comments enter comment about student here

6. **Site ID** – Drop-down list of previously entered site information.
7. **Building Name/Number/Room No./Contact** – These three fields are for the individual's site information. They are all text fields, the Building Name/Number is limited to 25 characters, the Room Number is limited to 6 the Contact field is limited to 40.
8. **Parent's Name(s)/Home Phone/Work Phone** – Pre-formatted date fields and the Parent's Name field is a text field limited to 50 characters.
9. **Address/City/State/Zip Code** – The Address and City fields are limited to 30 characters each with the State and Zip Code fields pre-formatted. Information entered under System Settings for the City and State will be the default on this form.
10. **Comment** – This field is for any important or relevant comments concerning the individual. This is a text field limited to 100 characters.
11. **Agency** – Drop-down list of previously entered Agency information.

The next tabbed section, *Assigned Equipment*, displays currently assigned equipment for the individual, as well as a history of previously assigned equipment.

Jane Doe

To check out equipment, click the Assign Equipment button.
To unassign equipment, uncheck it below.

Assign Equipment

Equipment Currently in Use			
Equipment ID	Description	Chk Out Date	Checked Out
KEY1234	Microsoft keyboard	08/13/2003	<input checked="" type="checkbox"/>
MON4321	17" Monitor	08/13/2003	<input checked="" type="checkbox"/>

Equipment Usage History					
Equipment ID	Description	Check Out Date	Return Date	Site Name	Contact
CPU1234	Pentium 4, 20Gg hard drive, 1Gg F	8/13/2003	2/21/2004	School Name, C	Alice Sn

To check out new equipment, simply click on the [Assign Equipment] button. This button opens an Equipment Check Out pop-up form, which gives direct access to all available equipment in the database. Site ID, Equipment ID, and Check Out Date are all required fields. Note that the equipment will not be assigned until the [Check Out] button is clicked.

Equipment Check Out

Patron: 433848899 Doe, Jane

Site: 123 School Name

Contact Person: Mrs. Watson

Check Out Date: 2/9/2004 Due Date:

Select Equipment to Check Out
CPU1234 Pentium 4, 20Gg hard drive, 1Gg RAM

Check Out Add New Equipment Exit

Equipment Check Out Complete
CPU1234 checked out to Doe, Jane
OK

!Error! Only items in the drop-down list can be Checked Out. If you enter an item that has already been checked out or does not yet appear in inventory, the following error will appear:

Invalid Entry

Invalid Equipment ID. Please select a valid entry from the list.

OK

The Equipment Check Out pop-up form also allows new equipment to be added to the database by clicking on the [Add New Equipment] button. This shortcut expedites the data entry process allowing the user to quickly add a few pieces of information identifying the equipment being check out without spending a lot of time on details. The user will, however, need to remember to go back to the Equipment Inventory form later to provide more detailed information on the new piece of equipment.

Equipment Currently In Use – This sub-form displays all the equipment that is currently checked out to the individual. If any item needs to be removed from this list, i.e. 'unassigned', simply click on the check box beside the equipment to remove it. This will unassign that particular piece of equipment and automatically make a change to the 'List of Available Equipment' in the database. This will also show the piece of equipment under the next section, Equipment Usage History.

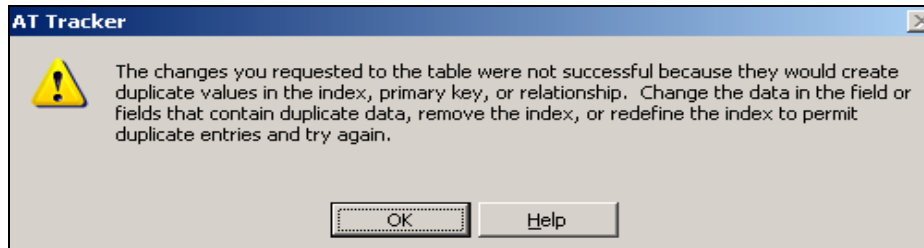
Equipment Usage History – This sub-form shows all equipment that has been previously checked out and back in by the individual.

7. Equipment Categories

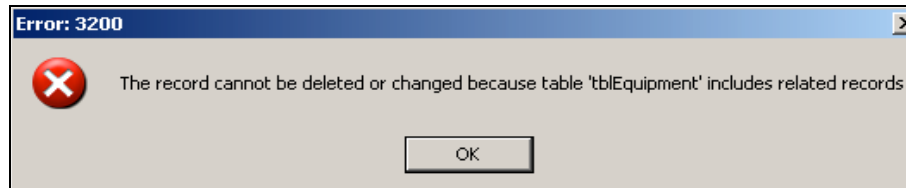
This form provides a list of the types of equipment that are kept in inventory by the agency. These entries should remain generic.

Using equipment categories enables AT Providers to view and report on equipment by category. For example, a list of all available Touch Windows can be printed if the equipment category feature is used. New categories can be added to this list by simply clicking the [Add] button. This is a text field and is limited to 25 characters.

!Error! If a duplicate entry is made the following error message will be displayed.



!Error! If you try to delete an entry already in use, the following error message will be displayed.



8. Equipment Inventory

This form allows an agency to keep a record of the equipment that it owns or utilizes, as well as keep track of its usage and repairs. As each new piece of equipment is purchased, it can easily be added to the existing database. There are three tabs on this form: *Equipment Specifications*, *Usage History*, and *Repair/Maintenance History*.

Equipment Inventory Your Agency Name Here

Mass Data Entry Add Edit Save Undo Delete Exit

Equipment Specifications | Usage History | Maintenance History

Equipment ID CPU1234	Serial Number 827342389	Model Number AC87348G8475	District ID 1
Purchase Date 5/12/2002	Purchase Cost \$400.00	Equipment Category CPU	Manufacturer Acme Computers
Equipment Vendor Computer Vendor, Inc.	Funding Source Medicaid	Other Additional field to	
Description Pentium 4, 20Gg hard drive, 1Gg RAM	Comments Any comments about equipment or additional information that needs to be recorded may be entered into this field		

This Equipment is Checked Out To: Jane Doe (433848899)

The *Equipment Specifications* tab contains the following information:

- Equipment ID** – This field is a required text field and is limited to 20 characters. A unique equipment Identification number or code is entered in this field. If an existing ID system is already in place (i.e., barcodes), those ID numbers can be entered here. Giving id numbers some thought at this point can prove beneficial. For instance, some type of grouping within the numbering system can be incorporated. Such as, all Touch Windows could have id numbers that start with “TW” and all Computers can start with “PC”.

2. **Serial Number/Model Number/ Purchase Date/Purchase Cost/Manufacturer/Vendor** – These fields are important bits of information that should be diligently recorded for a wide variety of reasons; not only to keep track of the agency's equipment inventory, but also for insurance and warranty purposes, as well as facilitating repairs. The Serial Number and Model Number fields are text fields limited to 25 characters. The Purchase Date and Purchase Cost fields are pre-formatted. The Manufacturer and the Vendor fields are both text fields limited to 35 characters.
3. **Equipment Category** – This field is useful for classifying each piece of equipment and will facilitate future searches of the database when a particular type of equipment is needed. Categories should have already been set up prior to entering in equipment.
4. **Funding Source** – This field is useful in tracking funds and will facilitate future searches of the database. Funding Sources should have already been set up prior to entering in equipment.
5. **Other** – This field can be used to record information useful to the agency that is not covered by the other fields on the equipment inventory form, such as Purchase Order number. This is a text field limited to 20 characters.
6. **Description** – This field is for a basic physical description of each item. This text field is limited to 250 characters and was intentionally created with extra space, so that there would be enough room to input a very detailed description of each piece of equipment.
7. **Comments** – This text field is also limited to 250 characters and can be useful for a variety of purposes. Improvements or modifications to each individual item can be recorded here. If the item requires a scheduled upgrade, cleaning or refurbishment in the future, a record of that requirement can be made within this field. Warranty information or site license numbers may also be included.
8. **Agency ID** – This is a required field. It is directly linked to the Agencies set up under System Settings.
9. **This Equipment is Checked Out To** – This field is a display only field that shows the personal ID number and name of the person to whom the equipment is checked out to. This will be blank if the equipment is not checked out.

!Note!

A [Mass Entry] button was added to this form to save time and reduce data entry errors. When entering several similar items from the same invoice, simply click on the [Mass Entry] button. After filling out the pertinent information on the form and completing the last field and you hit the enter key after the last word in "comments", the form will clear out the Equipment ID number and the Serial Number (leaving all other information) so that the only information required for the next piece of equipment is the Equipment ID and the Serial Number.

The *Usage History* tab displays the list of people that the selected piece of equipment was assigned to in descending order by check-out date. This information is for display only and cannot be changed.

CPU1234 - Pentium 4, 20Gg hard drive, 1Gg RAM							Check Out	Check In
----- Dates -----							Delete	
Check Out	Check In	Due Date	Patron		Site		Contact Pers	
2/9/2004			Doe, Jane	433848899	School Name, Center Name, etc. (123)		Mrs. Watson	
8/13/2003	2/21/2004	5/13/2004	Doe, Jane	433848899	School Name, Center Name, etc. (123)		Alice Smith	

This screen has three buttons that can be used to manipulate the data displayed. The [Delete] button will delete the selected line of information. The [Check Out] button will open the Check Out screen described in section 9. The [Check In] button will open the Check In screen described in section 10.

The *Maintenance History* tab not only displays the history of Maintenance on the selected piece of equipment, but you can also update the current information and add new information.

CPU1234 - Pentium 4, 20Gg hard drive, 1Gg RAM				
Sent In	Add	Delete		Phone Num
Rec'd Back	Problem Description	Maintenance Description	Maintenance Facility	Contact Per
8/11/2003	description problem for CPU1234	description of work done on CPU1234	ACME Computers	(225) 928-34
8/13/2003				Jane Doe

The fields are described below:

1. Sent In – Pre-formatted field for the date the equipment was sent in for maintenance.
2. Rec'd Back – Pre-formatted field for the date the equipment was received back from maintenance.
3. Equipment Problem –Memo field with no character restrictions used to describe problem experienced with the equipment.
4. Maintenance Facility – Name of the facility performing the maintenance.
5. Maintenance Description – Memo field with no character restrictions used to describe the work done.
6. Phone Number/Contact Person – Phone number and name of the contact person at the maintenance facility.

9. Equipment Check Out

This screen provides the user another method of checking out equipment (without going through the Patron Information screen). Similar to the Patron Information form, the Equipment Check Out form has convenient Search by Name/Number fields. Once an individual is selected, their personal information will be displayed along with a list of all equipment that is currently checked out to them.

Search by Number
 Search by Name

Patron: Jane Doe (433848899) **Birth Date:** 12/11/1991
Site: School Name, Center Name, etc. (123) **Room:** 7 **Contact:** Mrs. Watson
If patron is a minor, name of parent/guardian: John and Sally Doe
Address: 1234 Main St. **City:** Happy Valley **State:** LA **Zip:** 70726-6543
Daytime Phone: (225) 112-4757 **Evening Phone:** (225) 676-6777

Equipment Checked Out					
Equipment ID	Description	Checked Out	Due Date	Site	Contact
MON4321	17" Monitor	8/13/2003	5/13/2004	School Name, Center Name, etc. (123)	Alice Sm
KEY1234	Microsoft keyboard	8/13/2003	5/13/2004	School Name, Center Name, etc. (123)	Alice Sm
CPU1234	Pentium 4, 20Gg hard drive, 1Gg RA	2/ 9/2004		School Name, Center Name, etc. (123)	Mrs. Wa

To assign new equipment to the selected individual, click on the [Check Out Equipment] button. This button opens up the Equipment Check Out pop-up form (similar to the one from the Patron Information screen).

The Equipment Check Out form also has a button for printing reports. Simply click on the [Report] button to view a printer friendly version of the individual's checked out equipment.

10. Equipment Check In

This screen provides the user with another method of checking in equipment (without going through the Patron Information screen).

Search by Number
 Search by Name

Patron: Jane Doe (433848899) **Birth Date:** 12/11/1991
Site: School Name, Center Name, etc. (123) **Room:** 7 **Contact:** Mrs. Watson
If patron is a minor, name of parent/guardian: John and Sally Doe
Address: 1234 Main St. **City:** Happy Valley **State:** LA **Zip:** 70726-654
Daytime Phone: (225) 112-4757 **Evening Phone:** (225) 676-6777

Select equipment to be checked in from the list below by clicking the box next to the Equipment ID. Then click [Check-In Equipment].

Equipment ID	Description	Checked Out	Due Date	Site	Contact
<input type="checkbox"/> MON4321	17" Monitor	8/13/2003	5/13/2004	School Name, Center Name, etc. (123)	Alice Smith
<input type="checkbox"/> KEY1234	Microsoft keyboard	8/13/2003	5/13/2004	School Name, Center Name, etc. (123)	Alice Smith
<input type="checkbox"/> CPU1234	Pentium 4, 20Gg hard drive, 1Gg RA	2/ 9/2004		School Name, Center Name, etc. (123)	Mrs. Watson

Simply click on the check box beside the item to be checked back in, then click on the [Check-In Equipment] button and enter the check-in date in the pop-up box.

11. Equipment Maintenance

This pop-up form provides the user with another method of entering information on sending equipment out for maintenance. The fields on this pop-up form are the same as the ones found on the *Maintenance History* tab on the Equipment Inventory form.

12. Equipment Disposal

The Equipment Disposal form is used to track equipment that is beyond repair or obsolete.

The fields are described below:

1. Equipment ID – Drop-down box of previously entered equipment.
2. Site Requesting Disposal– Drop-down box of previously entered sites.
3. Disposal Date – Enter the date of the request.
4. Requested By/Phone # – Enter the name and phone number of the person requesting disposal.
5. Pickup Site – Enter the name of the facility that currently has the equipment for disposal.
6. Disposal Site – Enter the name of the facility that will be disposing of the equipment.
7. Reason for Disposal – Enter the reason for disposal (beyond repair, obsolete, no longer needed...).\

Search/View Data

1. Equipment Usage

This form is used to view Equipment Usage data grouped by Equipment Category (either Available Equipment or Equipment in Use), Individual User, or by Site.

Equipment Usage Search

View Selection
Exit

Select View Type

By Equipment Category

By Individual User

By Site

Select Category

Communication Device
CPU
Dynamic Display Device
Keyboard
Laptop

Select Usage Filter

Available Equipment

Equipment in Use

Select View Type

By Equipment Category

By Individual User

By Site

Select Individual

433848899	Doe	Jane
987654321	Person	Sample

Personal Information

Select View Type

By Equipment Category

By Individual User

By Site

Select Site

123	School Name, Center Name, etc.
446	Some Middle School

2. Equipment Due

This form is used to search for Equipment Due. The data can be grouped by Person or by Site.

Select View Type

All Equipment Due

Equipment Due by Patron

Equipment Due by Site

Equipment Due Date Range:

thru

Select View Type

All Equipment Due

Equipment Due by Patron

Equipment Due by Site

Equipment Due Date Range:

thru

Select Individual

433848899	Doe	Jane
987654321	Person	Sample

Patron Information

Select View Type

All Equipment Due

Equipment Due by Patron

Equipment Due by Site

Equipment Due Date Range:

thru

Select Site

123	School Name, Center Name, etc.
446	Some Middle School

3. Maintenance

This form is used to search for Equipment that has been repaired or is still at the Maintenance facility. The data can be grouped by Equipment Category or by Maintenance Facility.

The screenshot shows a search form for Maintenance with three rows of filters:

- Row 1:**
 - Select View Type:** Radio buttons for "All Equipment" (selected), "by Equipment Category", and "by Repair Facility".
 - Maintenance Date Range:** Input fields showing "8/1/2003" and "8/25/2003" with "thru" in between.
- Row 2:**
 - Select View Type:** Radio buttons for "All Equipment", "by Equipment Category" (selected), and "by Repair Facility".
 - Maintenance Date Range:** Empty input fields.
 - Select Category:** A dropdown menu with options: "Communication Device", "CPU", "Dynamic Display Device", "Keyboard", and "Laptop".
- Row 3:**
 - Select View Type:** Radio buttons for "All Equipment", "by Equipment Category", and "by Repair Facility" (selected).
 - Maintenance Date Range:** Empty input fields.
 - Select Facility:** A text box containing "ACME Computers".

4. Disposals

This form is used to search for Equipment that has been Disposed of. The data can be grouped by the Requesting Site or the Requesting Person.

The screenshot shows a search form for Disposals with three rows of filters:

- Row 1:**
 - Select View Type:** Radio buttons for "All Disposals" (selected), "by Requesting Site", and "by Requesting Person".
 - Disposal Date Range:** Empty input fields.
- Row 2:**
 - Select View Type:** Radio buttons for "All Disposals", "by Requesting Site" (selected), and "by Requesting Person".
 - Disposal Date Range:** Empty input fields.
 - Select Site Requesting Disposal:** A text box containing "School Name, Center Name, etc." and "Some Middle School".
- Row 3:**
 - Select View Type:** Radio buttons for "All Disposals", "by Requesting Site", and "by Requesting Person" (selected).
 - Disposal Date Range:** Empty input fields.
 - Select Person Requesting Disposal:** An empty text box.

Administration

1. System Settings

The System Settings form is where the basic information about the specific agency should be entered. This form contains some data that will become the 'default' values in the creation of new records on other forms. Up to ten different agencies may be setup in this program.

Select Agency ▼				
Information on this System Settings form is used on reports, main menu heading, and new record creation.				
Agency	Agency ID	City	State	Country
Your Agency Name Here	1	City	LA	USA
Department Head		Phone		
Department Head				
The City, State, and Country entered here will be used as a default on creation of new records.				
Equipment Provider	Provider's Address		Zip Code	
			70817-	
Phone Number	Email Address			
<input checked="" type="checkbox"/> Selected As Default Agency			*Required fields are green	

1. **Select Agency** – Drop-down list of all agencies previously entered in the system.
2. **Agency** – This is a text field limited to 50 characters for the name of the agency or school district.
3. **Agency ID** – This is a long integer number used to identify each agency on subsequent forms.
4. **City/State/Country** – These three fields will be used as default values in the creation of new records on other forms that use City, State, or Country. They are all text fields with character limitations of 50/2/25.
5. **Department Head** – This is a text field limited to 50 characters for the name of the Director or Supervisor in charge of the entire agency or school district providing AT Services.
6. **Phone** – Pre-formatted field for the phone number of the agency's main office.
7. **Assistive Technology Provider** – Text field limited to 50 characters for the AT Provider's name.
8. **AT Provider's Address** – This two-line field is for the address of the AT Provider. Both fields are text fields limited to 50 characters.
9. **Zip Code/Phone Number** – Both of these fields are pre-formatted.
10. **Email Address** – This is a text field limited to 50 characters.
11. **Selected As Default Agency** – Checking this box determines which agency's data is active and available to be viewed and altered.

2. Link Data

The link data feature is only available on network versions of Equipment Tracker. The purpose of this utility is to re-link the Equipment Tracker program file to the Equipment Tracker data file that has been moved to a network drive. Upon installing the network version of Equipment Tracker, the program and data files are placed in the following folder: C:\Program Files\ETRACv1.3.

ONLY the data file should be moved to the network drive. Once the data file is moved to the network drive, use the *Link Data* form to link the program file (located on the master computer) to the data file on the network. The data file name is: ETrackerv1.3Data.mdb.

Use the [Browse Folders] button below to select the location of the program data file or you may type in the full path of the data file. The data file name for Equipment Tracker v1.3 is **ETrackerv1.3Data.mdb**

This program is currently linked to:
C:\Program Files\ETRACv1.3\ETrackerv1.3Data.mdb

Enter New Data File Location (include file name and extension)

C:\Program Files\ETRACv1.3\ETrackerv1.3Data.mdb

Browse Folders

After typing or selecting the program data file to which you wish to link, click the [Link Data] button below to execute the link data command.

Link Data

Exit

!Note! Microsoft recommends that client-server applications like Equipment Tracker have the program on each individual PC workstation and the data located on a sharable network drive.

3. Reports

A wide variety of reports can be generated using the Equipment Tracker program. Reports focused on sites, assessments, equipment, etc. can all be viewed and printed out separately. Reports can also be generated for any student receiving any AT services and include a detailed accounting of each student's progress. Reports will only reflect information for the selected agency (shown at the top of the *Reports* form).

Mailing Labels have been added to the Reports menu for either Patrons or Sites.

Selected	Last Name	First Name	Street Address
<input checked="" type="checkbox"/>	Doe	Jane	1234 Main St.
<input checked="" type="checkbox"/>	Person	Sample	7465 Washingt

Select Report – In the first column, a variety of reports are listed, with a checkbox located to the left of each. The reports listed are the ones that are most often requested or required by AT Team Members. Click the checkbox beside the report name to select that report for viewing/printing.

Select Filter – In the second column, the report filters are listed to allow an AT Team Member to specifically tailor the report to meet their needs. Filters can be used individually or along with multiple filters to best describe the report needed.

Note Pad – A button has been incorporated on the *Reports* form that immediately opens the MS Notepad program to record notes and comments.

Preview Report – The [Preview Report] button at the top of the form allows the user to preview the report before printing. This is an excellent way to view the desired information ensuring that the Report meets the user's needs before it is printed.

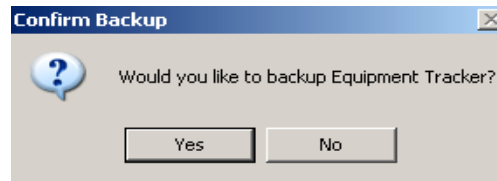
!Note!

a default printer must be setup on the PC in order to Preview a report.

1. **Needs Assessment Report** – this report lists personal information on each student along with the detailed needs assessment/training information (filters include Patron ID#, Site, Site Type, Team Member, and Date Range).
2. **Equipment Due Report** – this is a summary report listing summary information regarding equipment within a specific due date range (filters include Patron ID#, Site, Site Type, Equipment ID, Equipment Category, and Date Range).
3. **Equipment Inventory Report** – this is a detailed report of all equipment in inventory regardless of whether it is checked out or not (the two filters are Equipment ID and Equipment Category).
4. **Equipment – In Use** – this is a summary report of all equipment that is currently checked out (filters include Patron ID#, Site, Site Type, Equipment ID, Equipment Category, and Date Range).
5. **Equipment - Available** – this is a summary report showing only equipment that is available (the only filter available is Equipment Category).
6. **Maintenance Summary** – this is a summary report listing equipment maintenance records (filters include Equipment ID, Equipment Category, and Repair Date Range).
7. **Maintenance Detail** – this report show detailed information regarding each piece of equipment and any maintenance performed on it (filters include Equipment ID, Equipment Category, and Repair Date Range).
8. **Usage History** – this summary report can be sorted by Equipment or by Person and the information listed depends on which way the report is sorted. When sorted by Equipment, the report will list more detailed information about the piece of equipment (such as Manufacturer, Serial #, Other, and Comments fields), then under Equipment Usage the following fields are listed: Check-Out Date, Check-In Date, Personal ID/Name, Site ID/Name, and Contact. This report, when sorted by Patron, is handy when backtracking the usage of a device to pin point when/where a problem began. This report includes the following: Check-Out Date, Check-In Date, Equipment ID/Description, Site ID/Name, and Contact (the filters for this report will change depending on which sort is used).
9. **Disposal Report** – this is a summary report of all equipment disposed of within a specific date range (the only filter is the disposal date range).

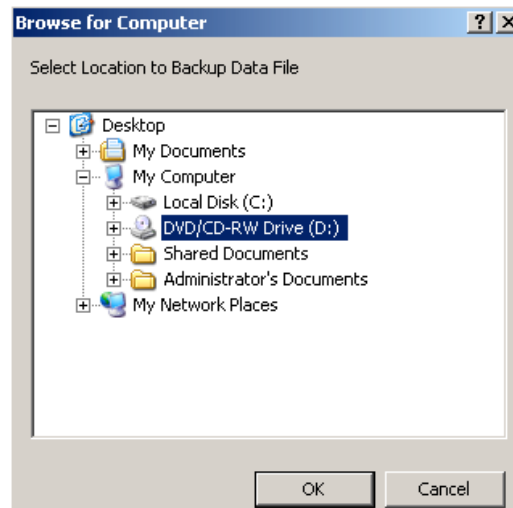
4. Exit System

Each time the Equipment Tracker program is closed, the system will ask if you would like to do a back-up.



Back Up

This function is provided as an easy way to back up data. Clicking [No] will simply exit the program. Clicking [Yes] will open a file browsing menu to select where you would like to save the back up. It is STRONGLY suggested that you back-up your data regularly!



If anyone has any comments or suggestions on how to improve the Equipment Tracker program or manual, feel free to e-mail sherry@adaptive-sol.com. I may not have time to personally respond to every e-mail, but constructive feedback is always encouraged.

Developed by: Sherion J. Hollingsworth
Distributed by: Adaptive Solutions
2127 Court Street
Port Allen, LA 70767
Tel: (225) 387-0428 – Fax: (225) 387-6092
Email: sherry@adaptive-sol.com
Web: www.adaptive-sol.com

Appendix



ET Tracker Forms



Needs Assessment Information

Name: _____ Patron ID No: _____

AT Team Member: _____ Site ID: _____

Contact Name: _____ Contact Date: _____

Equipment Needed Equipment: _____

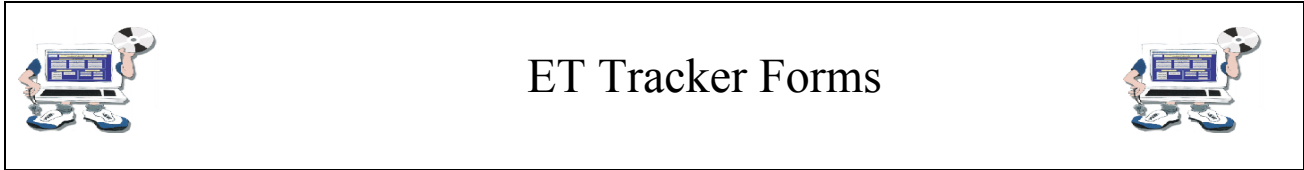
Training Needed Persons to be Trained: _____

Training Record and Notes

Trainee(s)	Phone	Date Trained

Notes: _____

Needs Assessment Form Developed By:
Adaptive Solutions
 2127 Court Street – Port Allen, LA 70767
 Tel: (225) 387-0428 – Fax: (225) 387-6092
 Web: www.adaptive-sol.com - Email: sherry@adaptive-sol.com



Patron Information

Name: _____ Patron ID No: _____

Birthdate: _____ Age: _____ Gender: _____

AT Team Member: _____ Site ID: _____

Building Name/Number: _____ Room Number: _____ Contact: _____

If patron is a minor, name of parent or guardian: _____

Day Phone: _____ Evening Phone: _____

Address: _____ City: _____ State: _____ Zip: _____

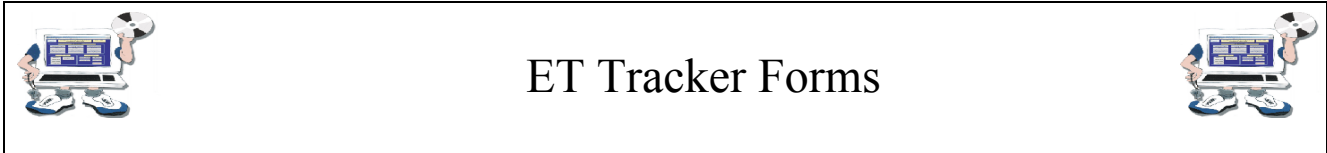
Patron Comments and Notes

Date: _____

Comments: _____

Notes: _____

Patron Information Form Developed By:
Adaptive Solutions
 2127 Court Street – Port Allen, LA 70767
 Tel: (225) 387-0428 – Fax: (225) 387-6092
 Web: www.adaptive-sol.com - Email: sherry@adaptive-sol.com



Equipment Inventory


Purchase Date	Purchase Cost	Equipment Category	Funding Source

Manufacturer	Equipment Vendor	Model #	Other


Description	Comments

Equipment ID	Serial Number		Equipment ID	Serial Number

Equipment Inventory Form Developed By:
Adaptive Solutions
 2127 Court Street – Port Allen, LA 70767
 Tel: (225) 387-0428 – Fax: (225) 387-6092
 Web: www.adaptive-sol.com - Email: sherry@adaptive-sol.com



ET Tracker Forms



Equipment Check Out/In Form

Name: _____ Personal ID No: _____

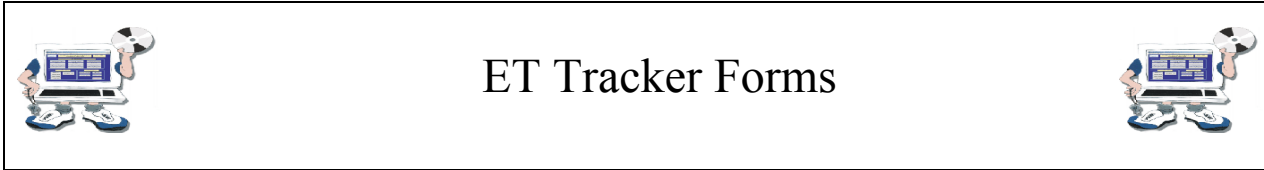
Site: _____ Contact: _____

Check Out/In Date: _____ Due Date: _____

ID Number	Serial Number	Description	Check Out (X)	Check In (X)

Received By: _____ Date: _____
Print ***AND*** Signature

Equipment Check Out/In Form Developed By:
Adaptive Solutions
 2127 Court Street – Port Allen, LA 70767
 Tel: (225) 387-0428 – Fax: (225) 387-6092
 Web: www.adaptive-sol.com - Email: sherry@adaptive-sol.com



Equipment Maintenance Entry Information

Equipment ID: _____ Equipment Name: _____

Serial Number: _____ Date Sent In: _____ Returned Date: _____

Maintenance Facility: _____ Phone No: _____

Contact Person at Facility: _____

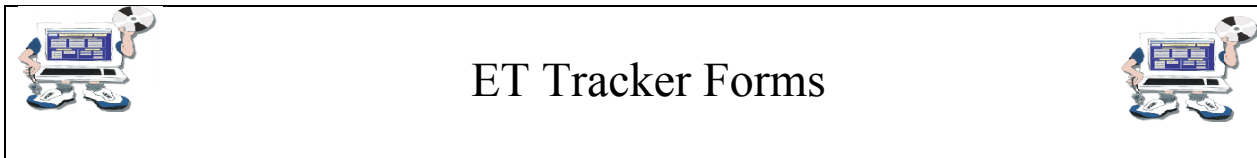
Maintenance Description and Notes

Date: _____

Description of Maintenance Needed: _____

Description of Maintenance Performed:

Equipment Maintenance Entry Form Developed By:
Adaptive Solutions
 2127 Court Street – Port Allen, LA 70767
 Tel: (225) 387-0428 – Fax: (225) 387-6092
 Web: www.adaptive-sol.com - Email: sherry@adaptive-sol.com



Equipment Disposal

Equipment ID: _____ Site Requesting Disposal: _____

Disposal Date: _____ Requested By: _____

Phone Number: _____ Pick Up Site: _____

Disposal Site: _____

Reason for Disposal Request:

Site Contact Person: _____ Phone: _____

THIS SECTION FOR PERSON PICKING UP EQUIPMENT TO BE DISPOSED

Outcome of Disposal Request

_____ Disposal Person _____ Date _____

Equipment Disposal Form Developed By:
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 2127 Court Street – Port Allen, LA 70767
 Tel: (225) 387-0428 – Fax: (225) 387-6092
 Web: www.adaptive-sol.com - Email: sherry@adaptive-sol.com

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Adaptive Solutions
Sherion J. Hollingsworth, Owner
2127 Court Street
Port Allen, LA 70767
U.S.A.
Tel: (225) 387-0428
Fax: (225) 387-6092
Web: www.adaptive-sol.com
Email: sherry@adaptive-sol.com