Lend-Items

Manage inventory easily

LendItems User Manual

V1.5

Table of Contents

Introduction

At its heart, LendItems allows you to keep track of all your stuff, who has borrowed it, when it is coming back and automatically reminds your patrons (borrowers) to bring it back!

What is it?

LendItems is a web application that sits in the cloud and keeps track of your items. It enables you (or your company) to create an online catalog of all your items and then keep track of who has borrowed which items and when they are expected back again.

What items can it keep track of?

LendItems can keep track of any kind of item that you can think of. This is because the user can create Item Categories with a defined set of fields to cater for just about anything. So LendItems can keep track of books, disks, films and videos, games, laptops, tablets, phones, cameras, and other electronics and office equipment, bikes, cars, tools, guns, music instruments, school inventories, lab equipment, furniture, sports equipment,….anything!

Who is it for?

LendItems is used by; schools, book clubs, church libraries, charities, universities, laboratories, acting schools, music schools, costume suppliers, bike clubs, gun clubs, photographers, outdoor education centers, occupational therapists, health clinics, student support services, disabled societies, kids clubs, …. everyone!

Features

LendItems is an extremely easy web application that provides the essential features needed to keep track of the borrowings, renewals, reservations and circulation of all your items. It covers most things you need and includes such features as;

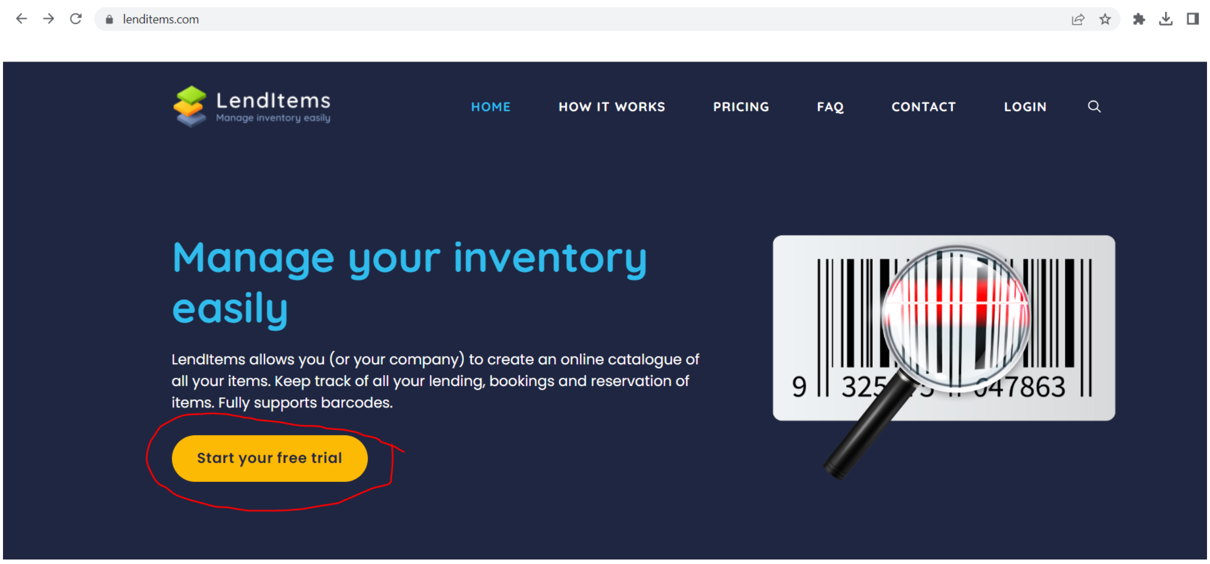
- Catalog any type of item
- Unlimited number of Item categories
- ISBN lookup for books
- Check-in and Check-out of items
- Barcodes can be used for both patrons and items
- Patron web portal for searching and reserving
- Renew, queue and reserver items
- Email notifications to both librarians and patrons
- Full history of borrowings
- Customized emails
- Export and import or users and items
- Login via third party authentication
- White Label application

Getting Started

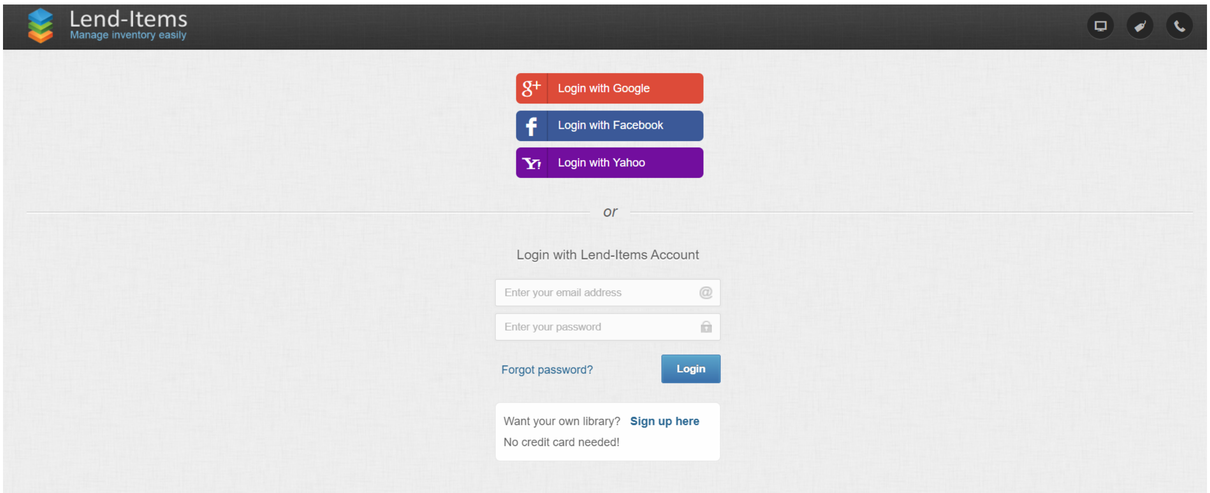
To get you started, let's imagine you have a science laboratory and want to lend out equipment such as microscopes to your users. Here is what you would do.

1. Signup and register your library

To sign up go to www.lenditems.com and click on the "Start your free trial button" as shown below.

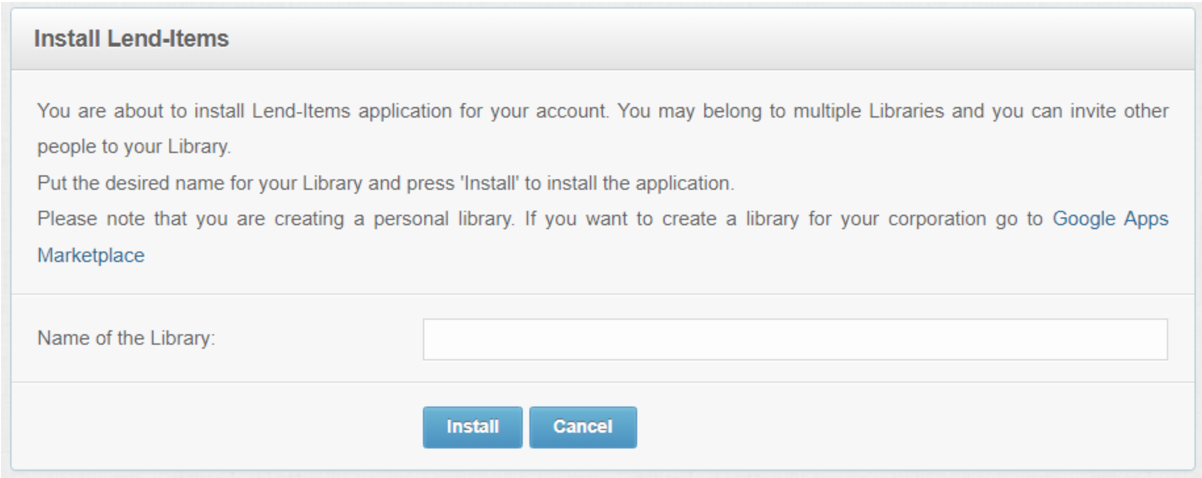


The following screen will appear. Here you should choose the appropriate way to login.



The user can then select either Lend-Items if they want to use Lend-Items authentication (an email address and password held in Lend-Items), or they can choose a third party authentication provider such as Google, Facebook or Yahoo.

After logging in via LendItems authentication or a third party authentication provider, the user will then be taken to the “Install Lend-items” dialogue and asked to enter a name for the new library they want to create.

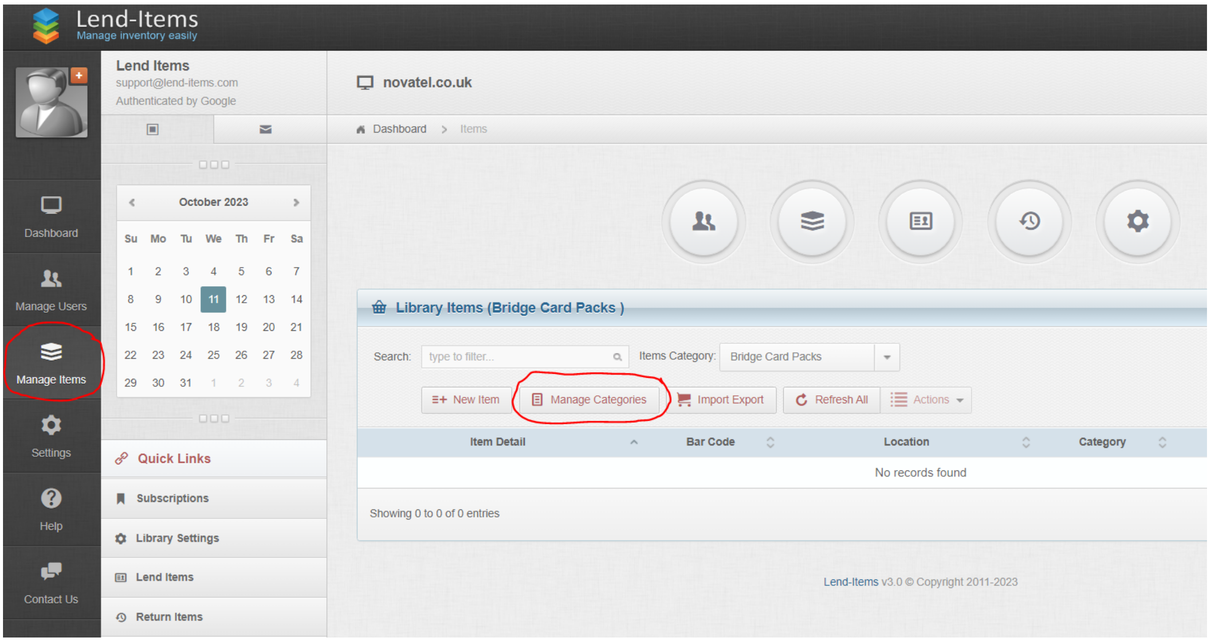


After entering the name of the new Library and clicking on the Install button the user will be brought to the main dashboard of the LendItems web application.

2. Divide your Items into Categories

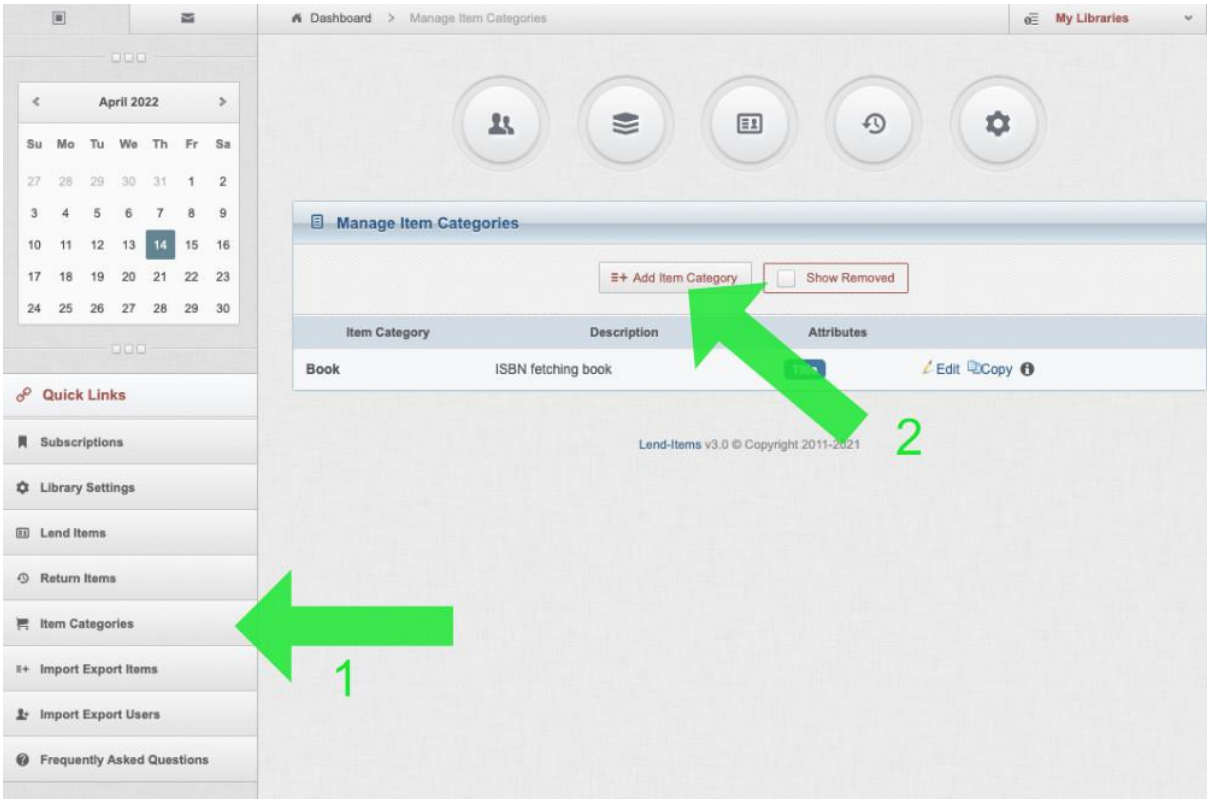
If your lab contains many items, it makes sense to divide them into categories. These may include microscopes, scales, thermometers, beakers, volumetric flasks, test tubes, etc.

To create and manage new categories, click on Manage Items on the main menu and then click on the red “Manage Categories” button as shown below.



Alternatively, to create and manage new categories click directly on the Item Categories menu option on the left.

To create a new item category, click on the red “Add Item Category”.



Once you decide how to divide your lab items into different item categories, you will be ready to create the first category.

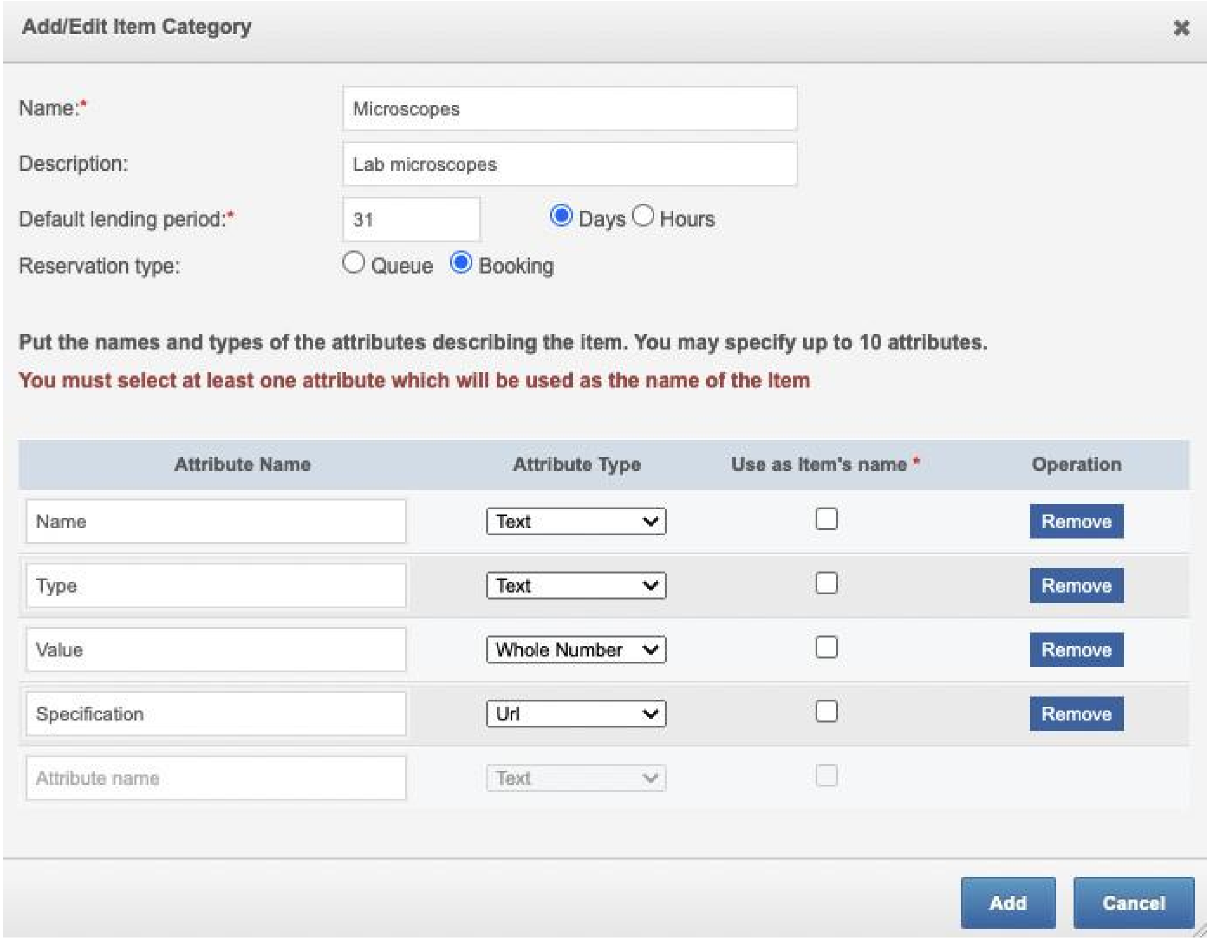
3. Create a category

Let’s create the first category for our lab for microscopes. Click Add Item Category and fill out the form to define the various fields that are going to be used for storing information about your microscopes.

Some fields are fairly self-explanatory, but let’s quickly explain Reservation types.

- **Booking** – you will specify the dates and time of day when you want to borrow the item and when you will bring the Item back
- **Queue** – you will not specify any dates. You will be put at the end of the queue for waiting on this Item and will be informed when your turn comes.

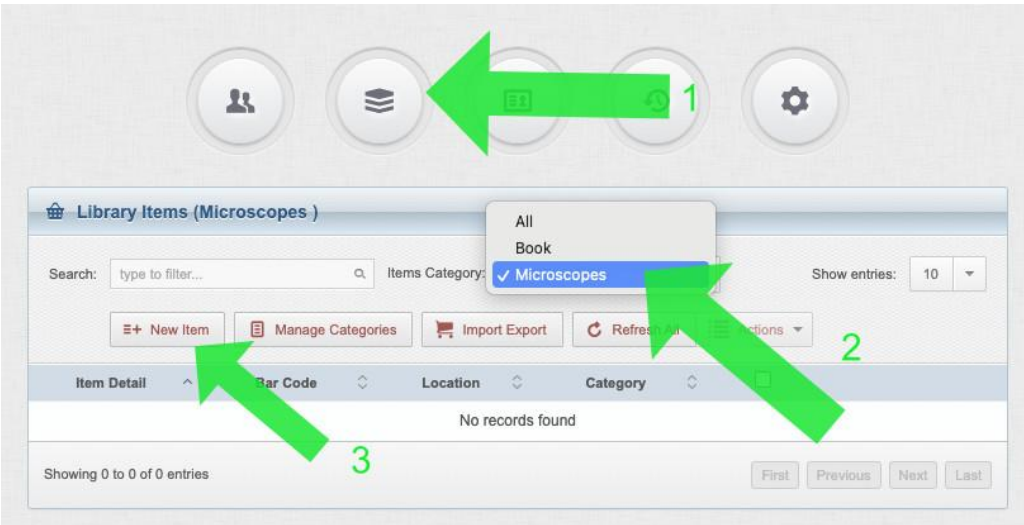
Lastly, you can define category attributes. These should be characteristics that allow identifying objects. As an example, we have put name, type, value, and specification, but you can use other attributes.



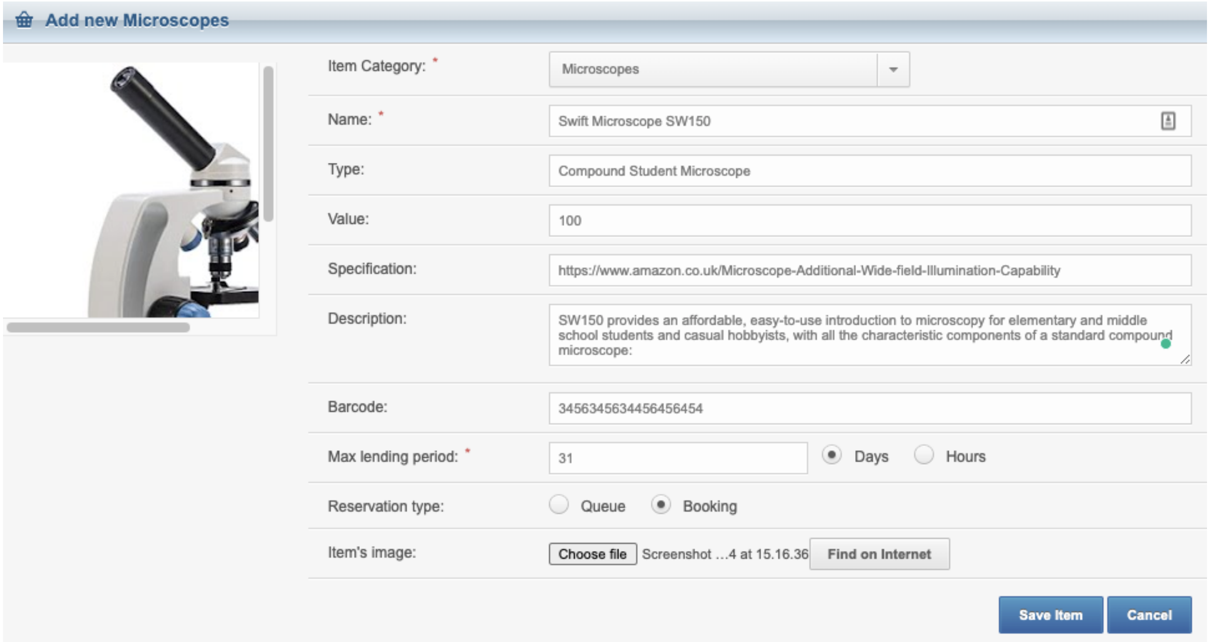
Do the same for each category you create. If you forgot a field you will be able to add it later.

4. Add items

Let’s add the first item. Click Manage Items and then from the Items Category list, choose Microscopes (or the name you defined) and then click on the red “New Item” button.



This will take you to the screen for adding a new Microscope Item to your Library as shown.



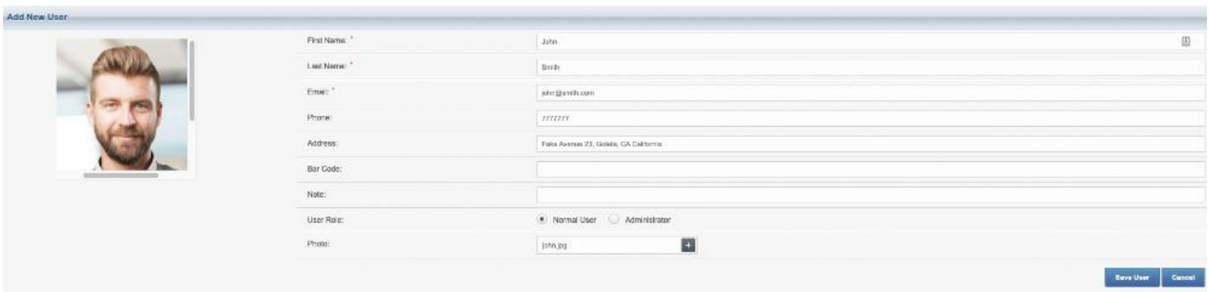
Fill out all the information about this particular lab item you want to manage into the fields/attributes which you have previously defined . Once everything is in place, click Save Item. The item will be saved, and it will be visible when you click Manage Items again.

Follow the same steps to add to the library more laboratory items from your collection. If needed, add more categories to keep everything nicely organized.

5. Add users

We now need to add users who will be the people who borrow the items in your library.

Click on the “Manage Users” main menu option and click the red “New User”. You will be taken to the Add New User screen where you should fill out all the information about the new user and then press the Save button as shown below.



As you may notice, a new user can have a role. He or she can be either a Standard User or an Administrator with privileges to administer both library items and other users.

When you create a new user, the LendItems application sends the new user a welcome invitation email with a link for the new user to click on to access the library.

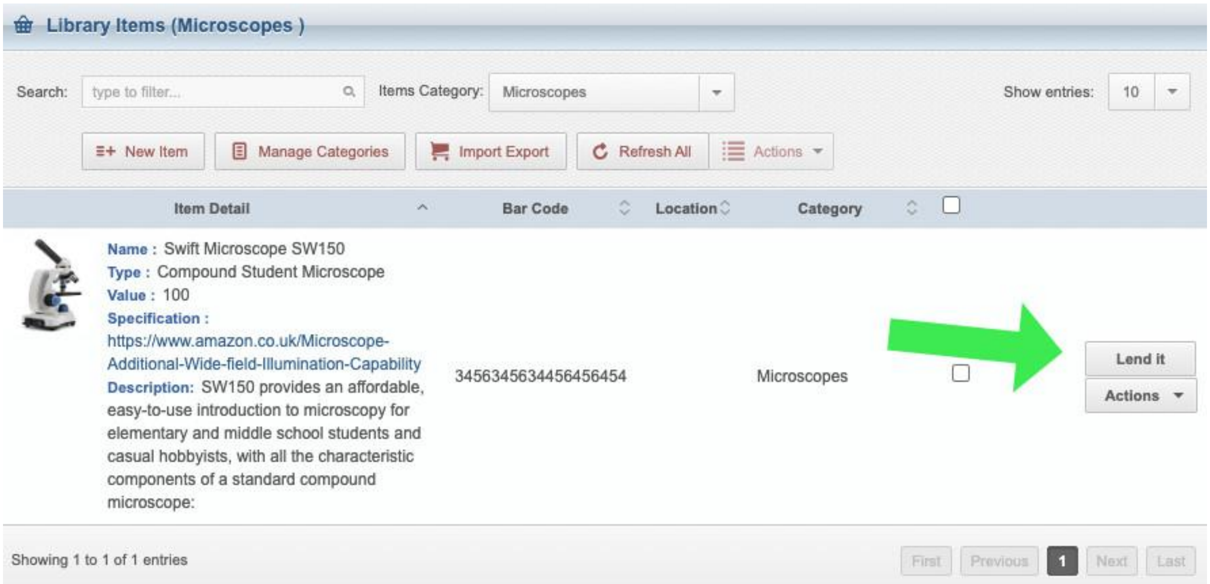
Continue to add all the users from your organization or group to your library.

6. Lend out an item

We now have items and users in our library so we are ready to lend out these items.

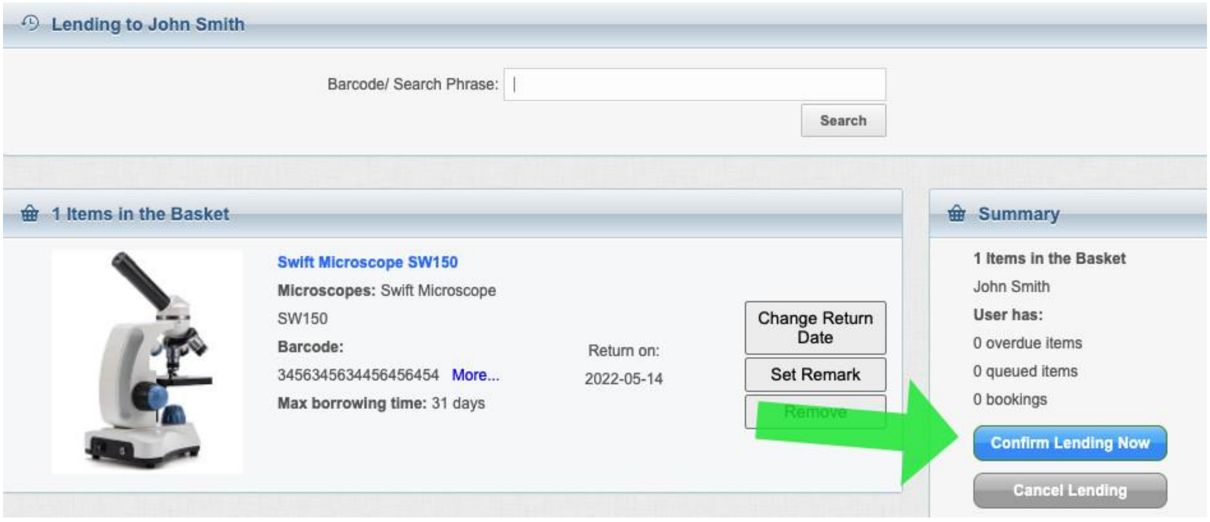
To lend out items to users you can start from either the User or from the Item. We will show the latter way here.

In the Manage Items screen, find the microscope we have just created, and click on the “Lend it” button on the right-hand side.



A new window will show allowing you to find and select the user you want to lend the item to. Type the username and click the search icon. When you find the user, click Select User.

This will lead to the screen for Lending to that use with the microscope prefilled in the list of items to lend out. You can search for and add more items to be lent out to this user during this Lending session. When you are happy with the list of items to lend, simply click on the blue “Confirm Lending Now” button to lend these items out.



If you go back to the Manage Items tab, you will see updated information about the lending next to the item where it will show who is currently borrowing this item

7. Return an item

When users return items, there are two ways you can return them, either from the Return Items screen or from the Manage Items screen. The above applies to the Manage Items screen where you can search for the item and simply click the Return button and the item goes back to the library.

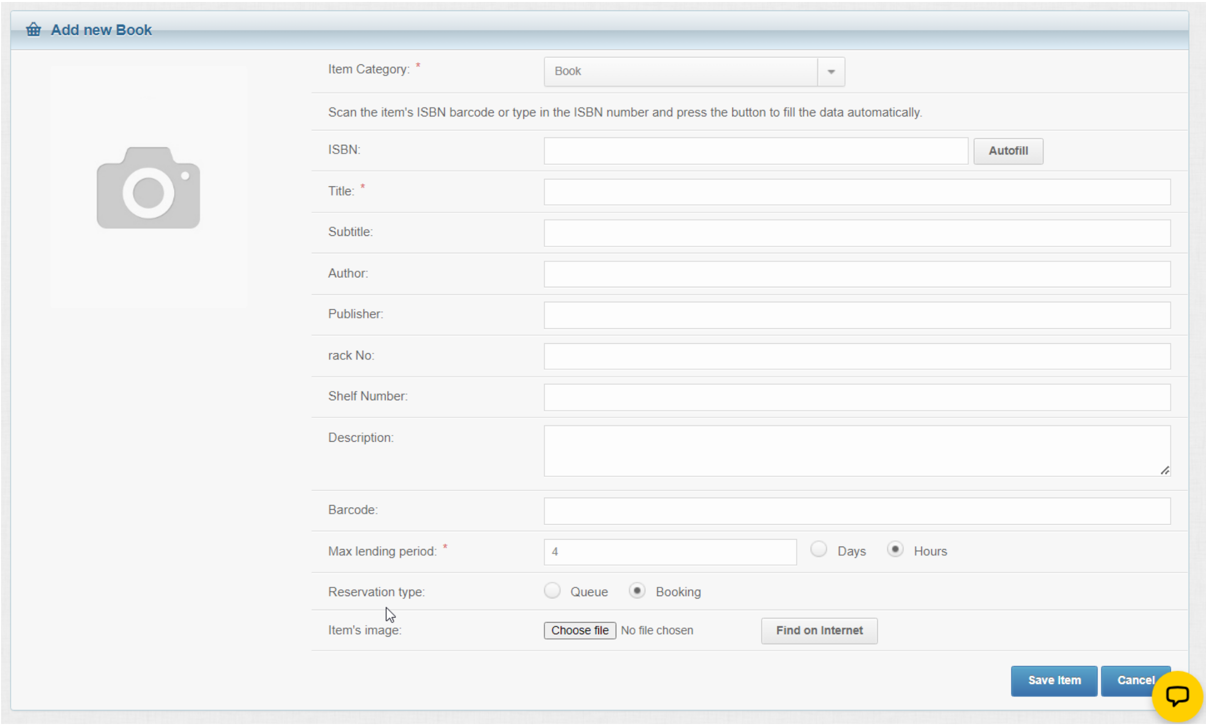
I hope that has wet your appetite and that this will help you with managing your Library. Though we have merely scratched the surface here, you will find more advanced features of LendItems by using it. But this simple tutorial will help you to quickly lend your first items.

Getting Started with Books

LendItems features the ability to scan in ISBN numbers to collect information about a book, video or other items which have ISBN numbers associated with them. To use this feature the Item category needs to be either Book or an item Category which has been cloned off the Book category.

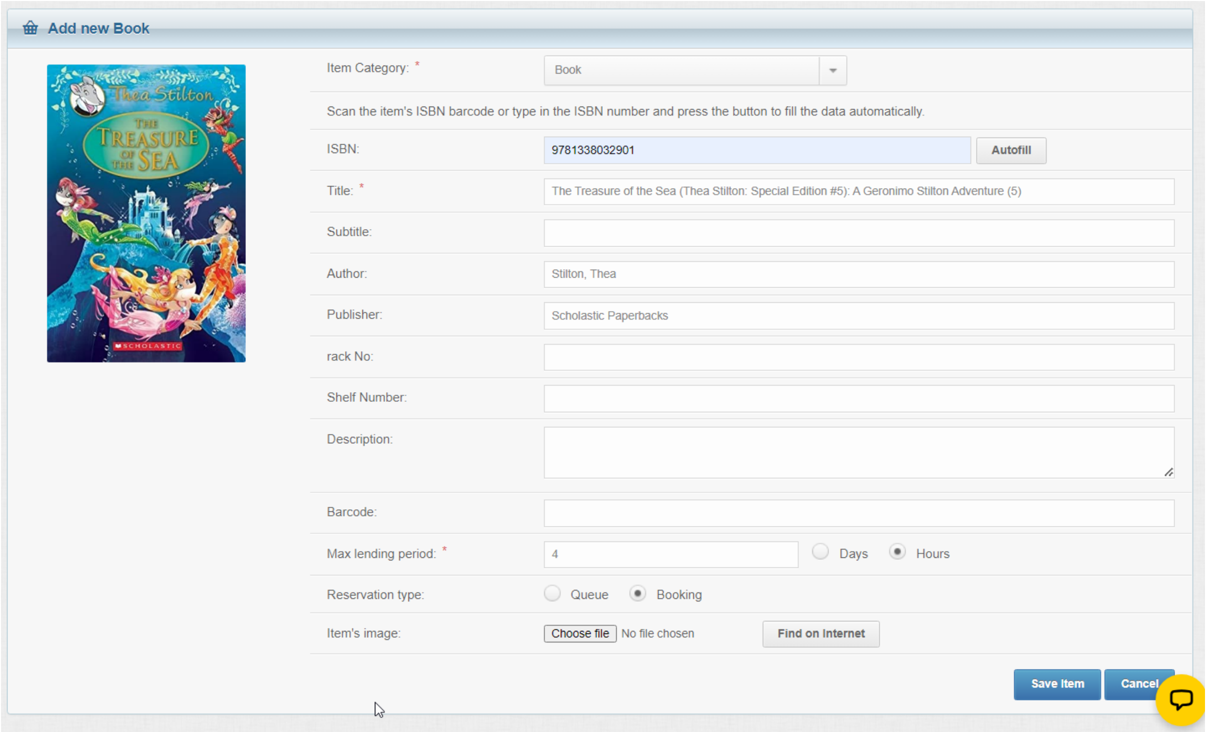
Using ISBN Numbers

To use this feature, such as when adding a new book item, go to the Manage Items screen, select the Book category or an Item Category that is derived from the Book category and either add a new item or edit an existing Item in this category. This will bring you to the adding or editing of an Item screen.



In the field labeled ISBN, either scan in the ISBN number from the book or manually type it in, and if necessary click on the Autofill button.

LendItems will do a search for the details of this ISBN number and automatically fill in the fields including a front cover image, as shown here.



If there are more details you want to enter, then you can do this now, and when you are ready, press Save Item to save this Item. If you are using barcodes then you will also want to scan in the barcode of the sticky label attached to this book, into the Barcode field.

Note. The barcode for the ISBN number should not be confused with the barcode of the item, that is a particular instance of this book. There could be a number of the same book each with the same ISBN number but each with its own unique barcode number.

Getting Started with Barcodes

A barcode scanner is a great tool to help you manage your library of items effectively. In essence, a barcode scanner reads the barcode and outputs the letters and numbers it represents just as if you had typed them. You can do the same thing manually but there are two advantages of using the scanner.

It saves a lot of time – scanning a barcode takes only a fraction of a second.
If the barcode is clearly printed, the scanner will read it without any errors.

Note that QR codes are just a special form of barcode, and QR codes can be used just as easily as barcodes with LendItems.

Barcode scanners are very affordable starting from about $20. No matter what sort of inventory you manage with LendItems, we encourage you to use barcode scanners.

What you need to have

For best results the following is what you should have:

- barcode scanner
- library cards – plastic cards with unique barcodes that you will give to users
- unique barcode stickers - which you attach to the items you lend

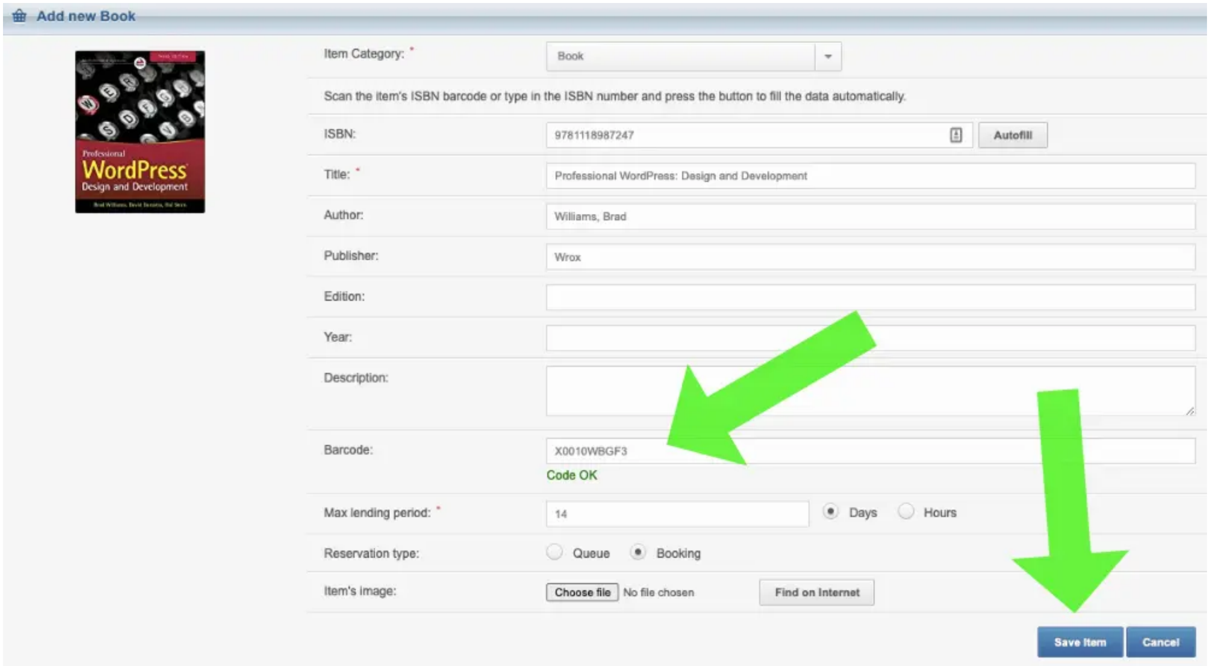
For more information about these accessories please see the section below on Useful LendItems accessories.

How to use the barcode scanner to lend books

For best results every item in the library and every user can be identified by a barcode.

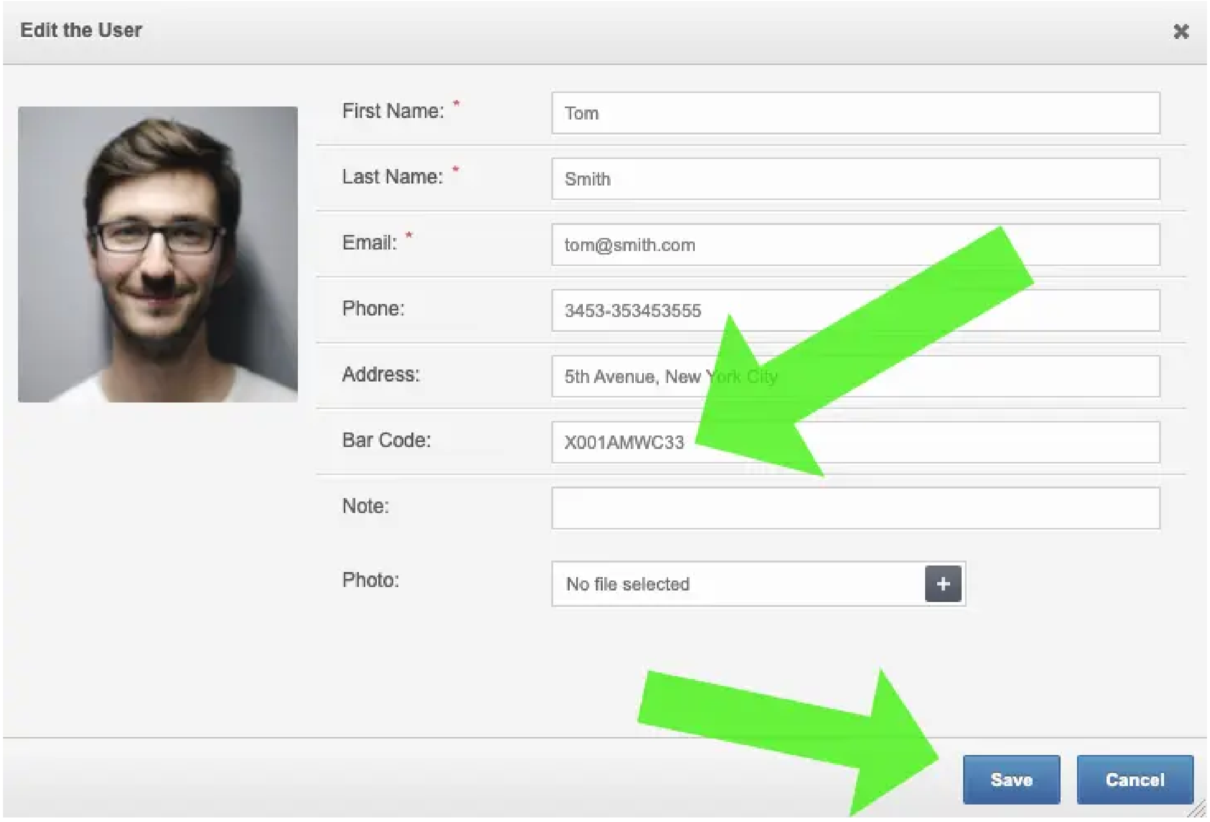
Before adding a new item (such as a book) to your library, stick a sticker with a barcode to it.

Then, as indicated below, move the cursor to the barcode field for that time and scan the barcode with the scanner. The message “Code OK” should appear if the barcode is unique across your library. If it is not unique, an error message will be shown.

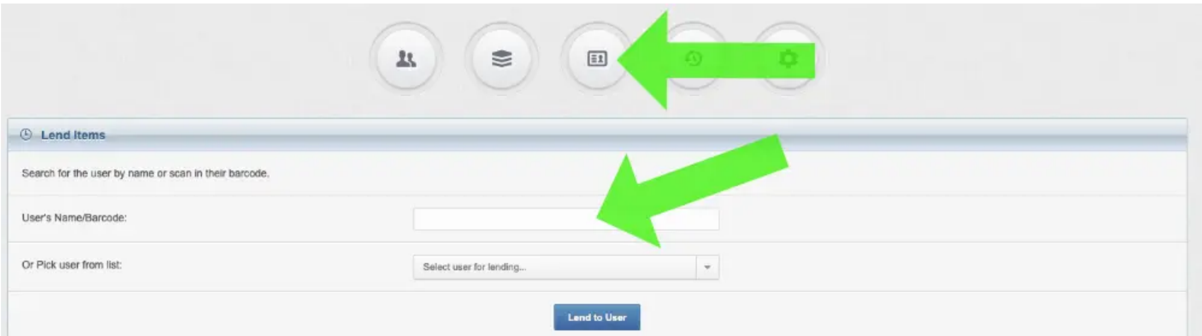


If you have existing items without barcodes, do not worry. You can edit them and add the barcode later at any time.

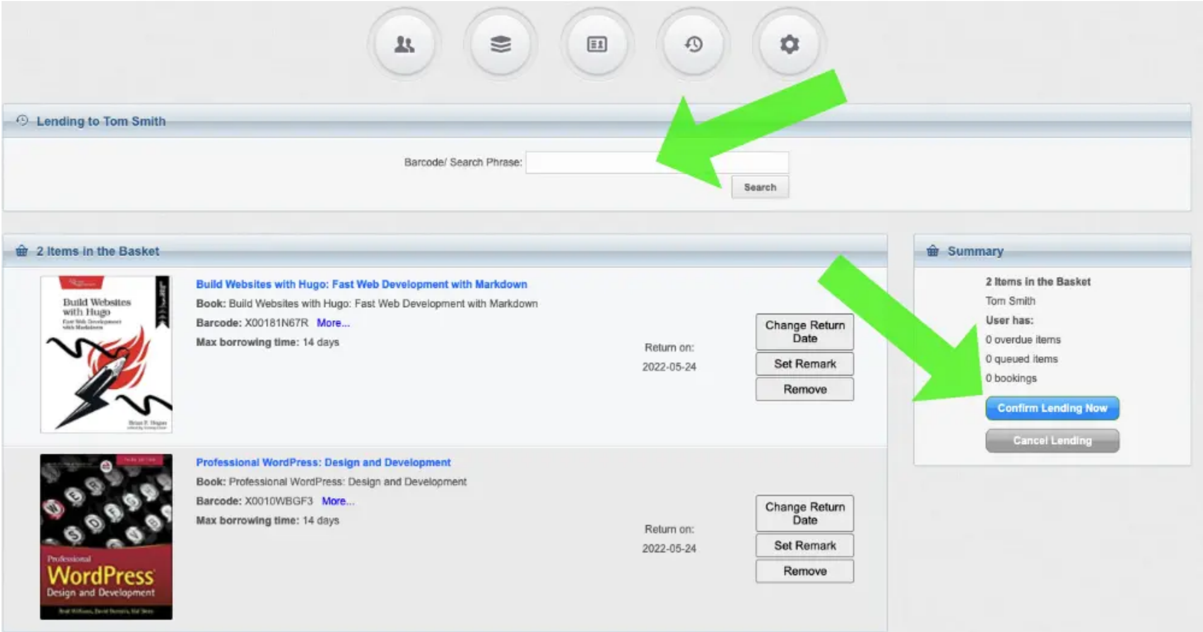
You can do the same for users. Add a barcode when creating or editing the user by scanning their library card into the User Barcode field as shown here.



Lending a book now is very easy. Go to Lend Items tab in the menu and quickly find the user by scanning his/her library card:

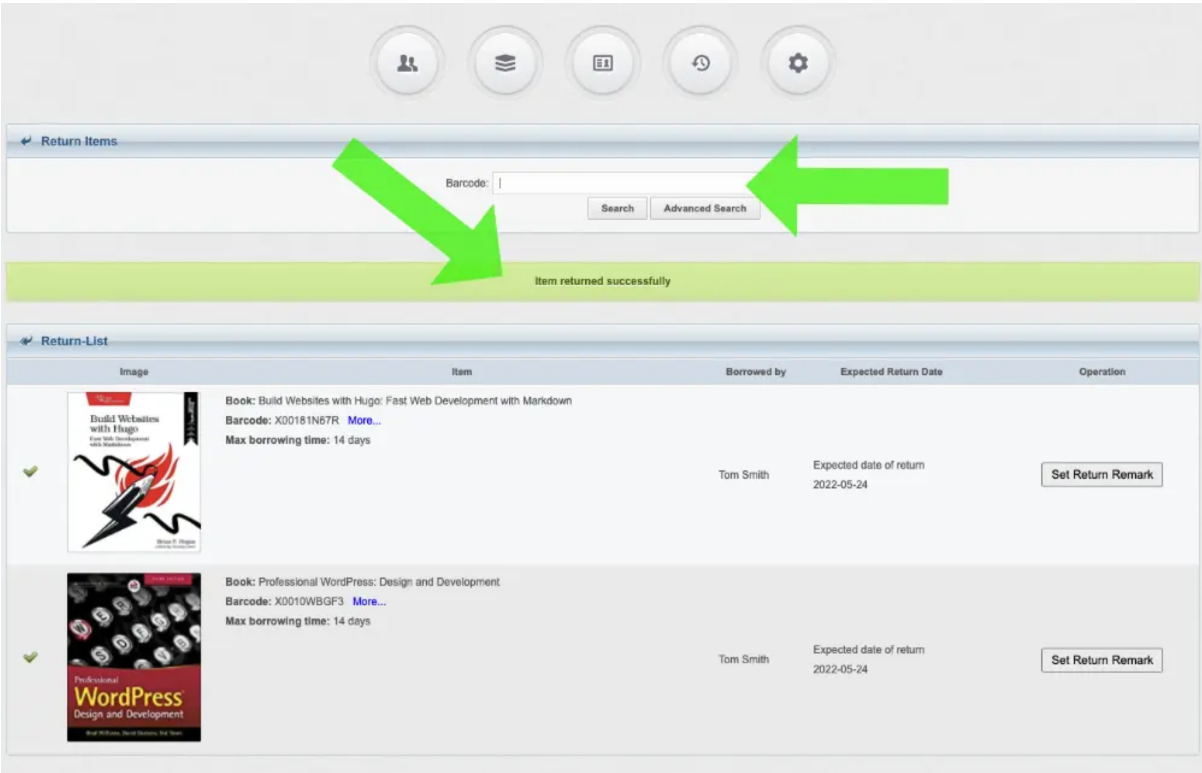


A new screen will appear. Now scan all the items you want to lend and confirm the lending by clicking the Confirm Lending Now button.



All the items will now be lent to the User.

To return the books, head to Return Items in the menu, and scan all the books that are being returned. There is no need to scan the User's library card at all.



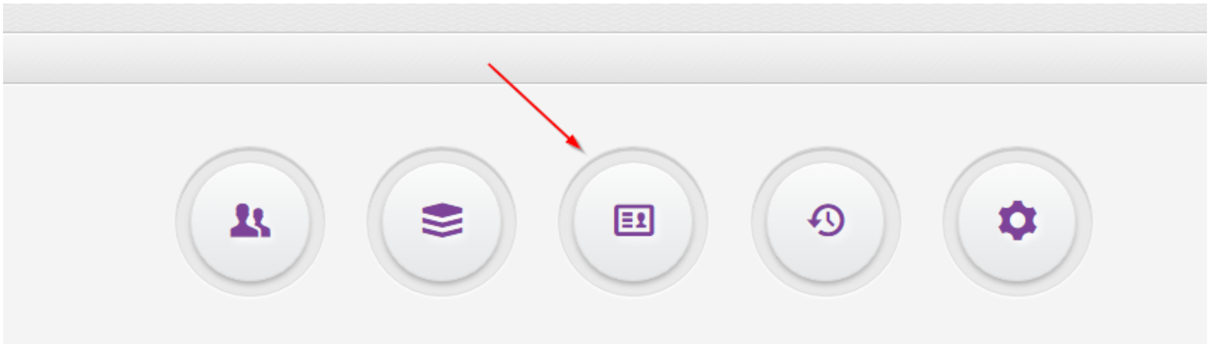
As each Item is scanned in, it will be marked as returned.

Getting Started with Rapid Lending

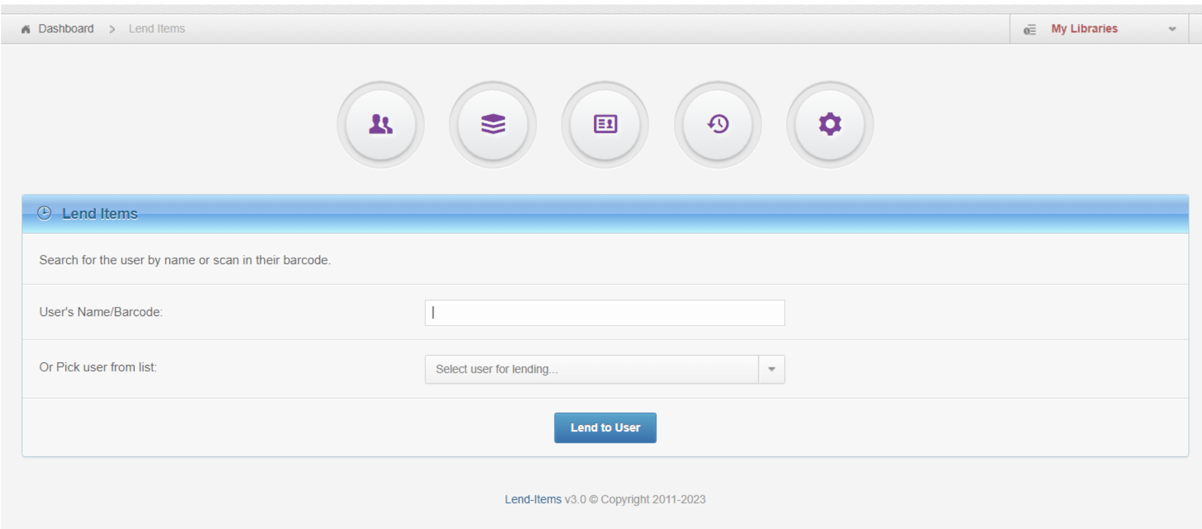
When using barcodes with both items and users and a barcode scanner it is possible to achieve very rapid Lending and Returning of Items.

Rapid Lending

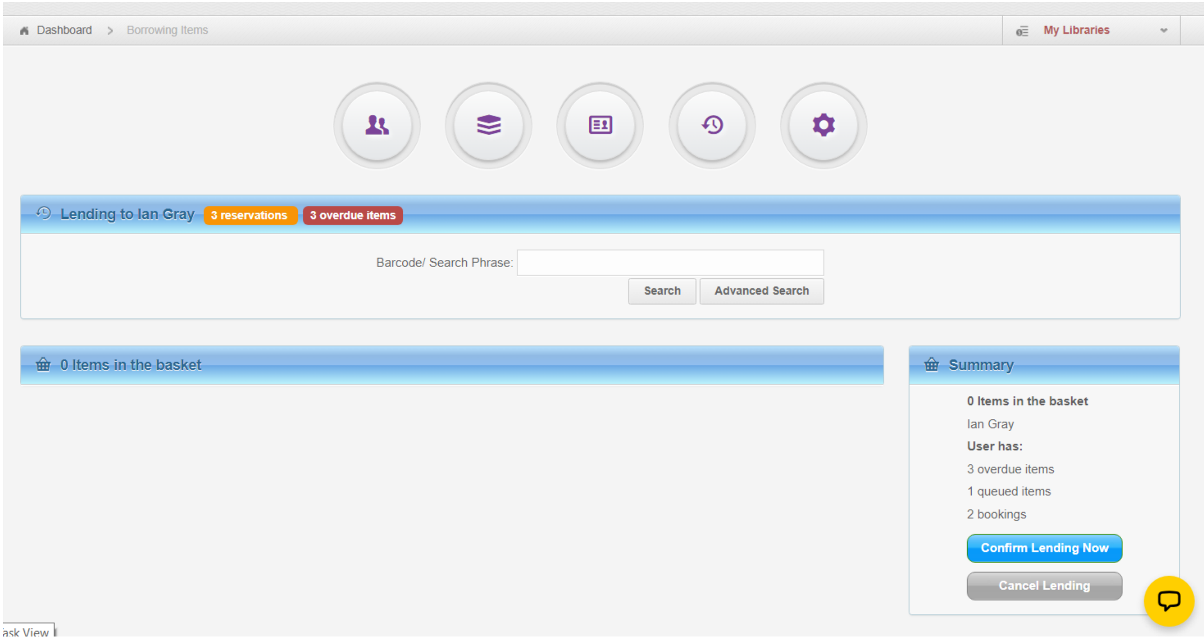
From the Dashboard click on the center LendItems button as shown below.



This will bring up the LendItems lending screen with the cursor already in the User's Name/Barcode field as shown here.



Simply scan in the barcode on the Lender's Library Card. This will immediately identify the User and bring you to the next screen, with the cursor in the Barcode/Search Phrase field.

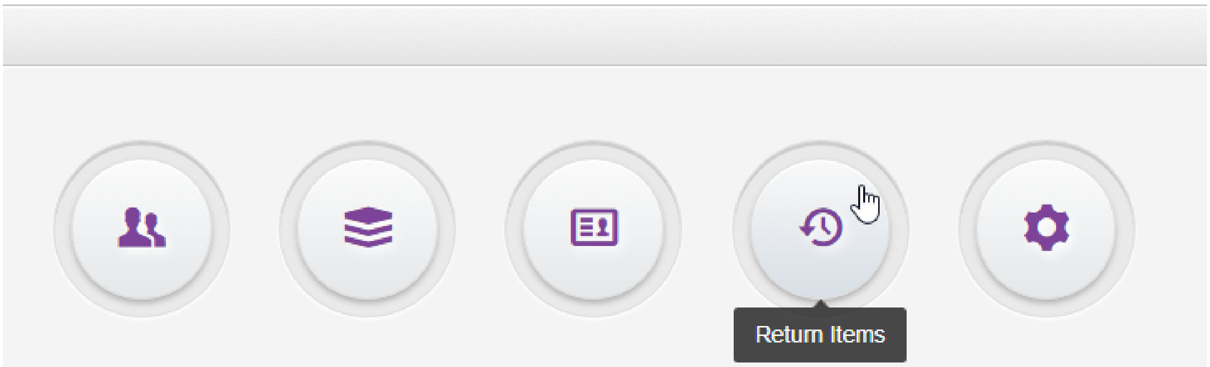


Simply scan in the barcode of the item you wish to lend. This will display the item in the list of items to be lent, and immediately put the cursor back on the Barcode/Search Phrase field ready for the barcode of the next item to be scanned in. In this way the items can be scanned very quickly. When all items have been scanned in, simply press return which will trigger the Confirm Lending Now button to be pressed, lending out the items and taking the User back to the first screen ready to scan in the barcode of the next User to lend Items to.

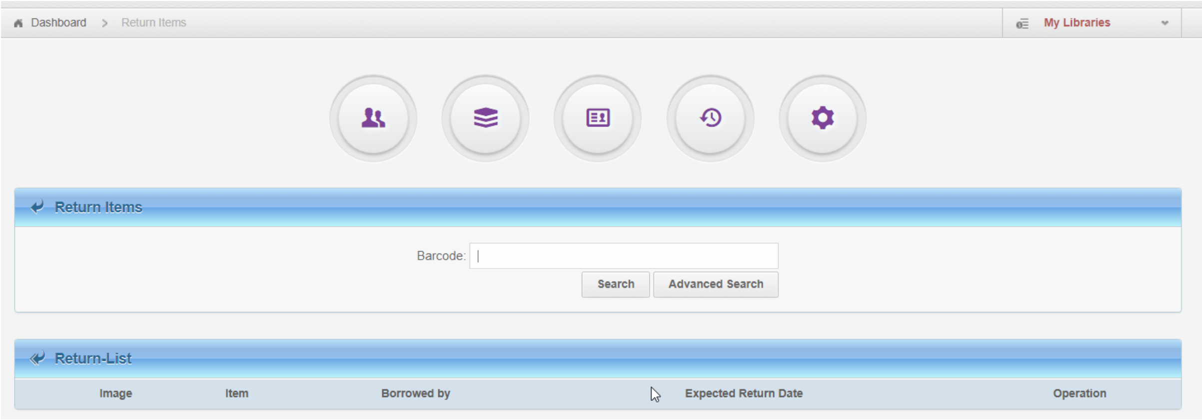
Note. The barcode scanner should be configured to automatically send a carriage return after scanning in a barcode.

Rapid Returning

To rapidly return items into the library, from the Dashboard click on the Return Items button.



This will bring up the LendItems Return Items screen with the cursor already in the Barcode field as shown here.



Simply scan in the barcode of the item you wish to return. This will display the item in the list of items returned, and immediately put the cursor back on the Barcode field ready for the barcode of the next item to be scanned in to return. In this way all items to be returned can be scanned very quickly.

Note. The barcode scanner should be configured to automatically send a carriage return after scanning in a barcode.

Useful LendItems Accessories

There are a few useful accessories that will help you to fully take advantage of our inventory management software. Of course, you can use our system on its own, and it works perfectly well. However, you will need to search for items and users manually, which can take time.

For a small business where equipment is lent occasionally, it is not a real issue. But if you use LendItems in a busy school library, with many books and students, these few extra seconds can quickly add up.

The better and faster solution is to use barcode labels, a barcode scanner and barcode user cards. These items are not expensive and will simplify and speed up the process of lending and returning your items.

Incidentally, using LendItems and barcodes in a book library has an additional advantage. When adding a new book, LendItems can identify the book quickly by scanning its ISBN code. This means you won’t have to type in all the information about the book, all the forms will be filled in automatically.

Let’s have a closer look and discuss each accessory in detail.

Barcode scanner

LendItems supports barcodes out of the box. The first thing you need to take advantage of this feature is a barcode scanner. Using one will allow you to find, lend and return items in a fraction of a second. Also, when adding books to a library, you can avoid typing mistakes.

Barcode scanners can come in many shapes and sizes. It doesn't have to be fancy, even a basic, cheap one will do the job. In the US, the cheapest scanners cost around $20-25.

Depending on the circumstances, you can buy a wired or wireless scanner. For instance, if you use LendItems to lend books at a library desk, a wired scanner connected to the computer via USB will suffice. However, if you need to go outside to scan cars, boats or other equipment, a wireless scanner connected to a laptop or tablet via Bluetooth may be preferable.

You can buy a barcode scanner from a number of retailers. Amazon is a good place to start.

Pre-printed, ready barcode stickers

When you add a new item to your library of items, stick a label on it with a barcode and register the barcode in the software. Once this is done, you will be able to quickly find this item in the software by scanning it with a barcode scanner.

Where can you get these labels from? You can either print them yourself or purchase ready made barcode labels which can remove a lot of the hassle involved with barcodes.

By all means, print your own stickers, if this works for you, but you may need special software and paper with labels, and even if you do succeed, some labels may not be as durable as you would like. So we recommend buying pre-printed, ready made barcode stickers (sometimes they are called asset tags). They are cheap, durable, scratch-resistant and ready to use. Depending on your needs, they can also look better and more professional than a self printed label.

As with barcode scanners, you can buy these pre-printed labels from many retailers.

Barcode cards for the users

If you have regular users, you can provide them barcoded library cards as shown above.

Using barcoded library cards allows you to quickly find the user without having to search.

As before, we need to link the user to the barcode. When the barcode is scanned, LendItems will locate them in the library.

Because these cards are made of plastic and are more substantial, they cost a little more. They can come in a variety of shapes and sizes, the majority have got a shape of a bank card but can also be smaller key tags with barcodes. For some extra money, you can also print on their pictures or logos of your organization.

Here are examples of companies where such cards can be purchased.

- Demco (US)
- Barcodes (US)
- SimpleLibrarySystem (US, UK, EU)
- CP Cards (UK)

Current Limitations in LendItems

There are a few limitations with LendItems which we mention here.

Tracking Quantities of an Item

Currently every item in LendItems is treated as an individual item. LendItems does not currently have the ability to keep track of the quantity in stock of an item. Rather every item has to be entered into the system separately.

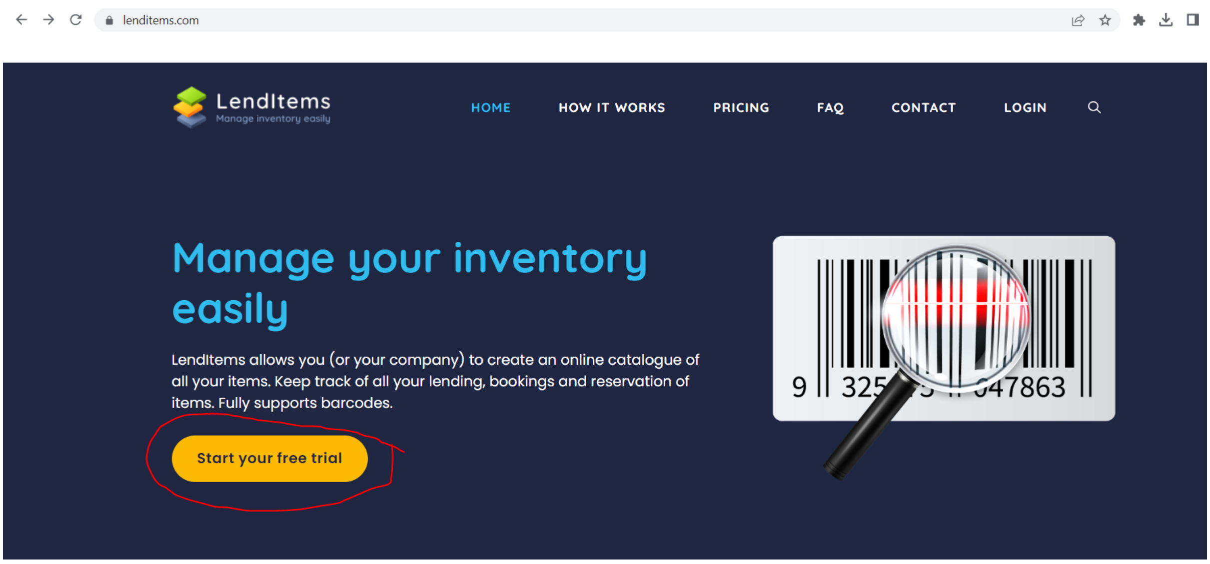
Creating a Library

When creating a library there are two kinds of users who can do this.

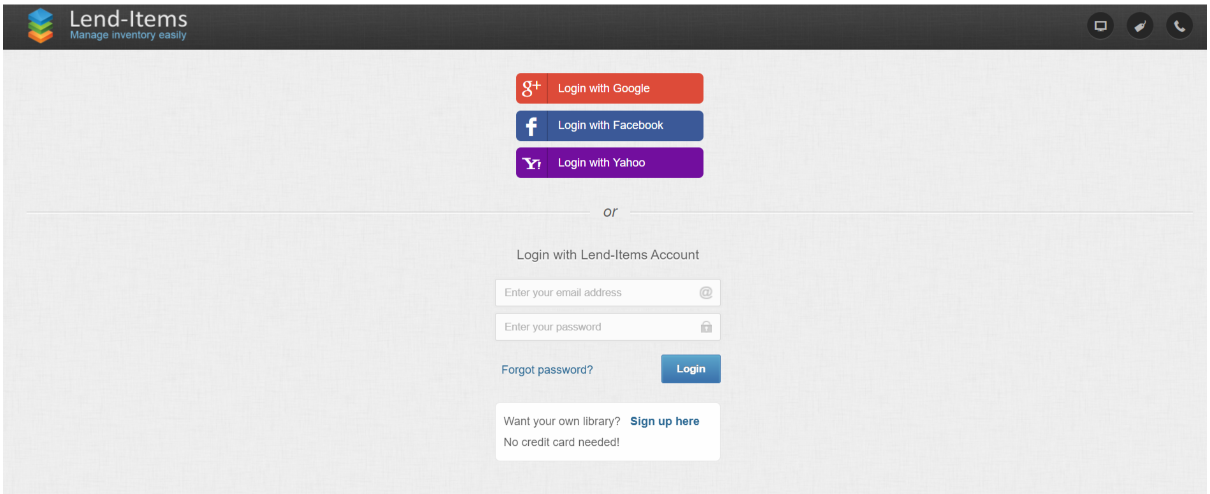
- First Time users
- Users who already belong to another library

First Time user

If you have never used the LendItems library system before and this is your first time of trying, then to create a new library, simple go to www.lenditems.com and click on the "Start your free trial button" as shown below.



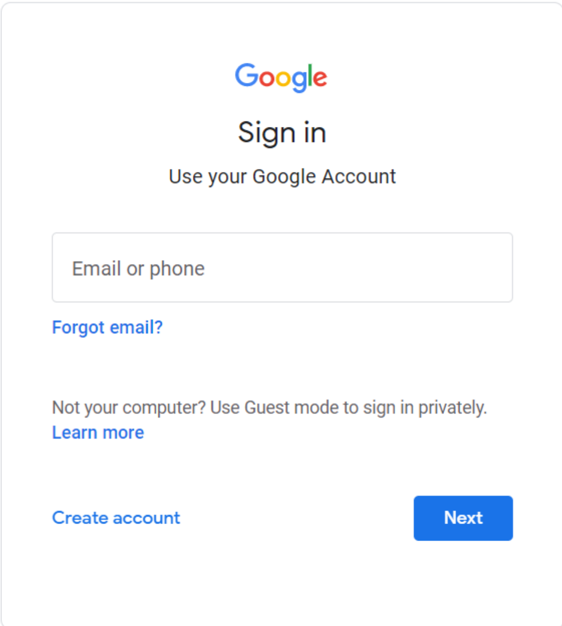
The following screen will appear. Here you should choose the appropriate way to login.



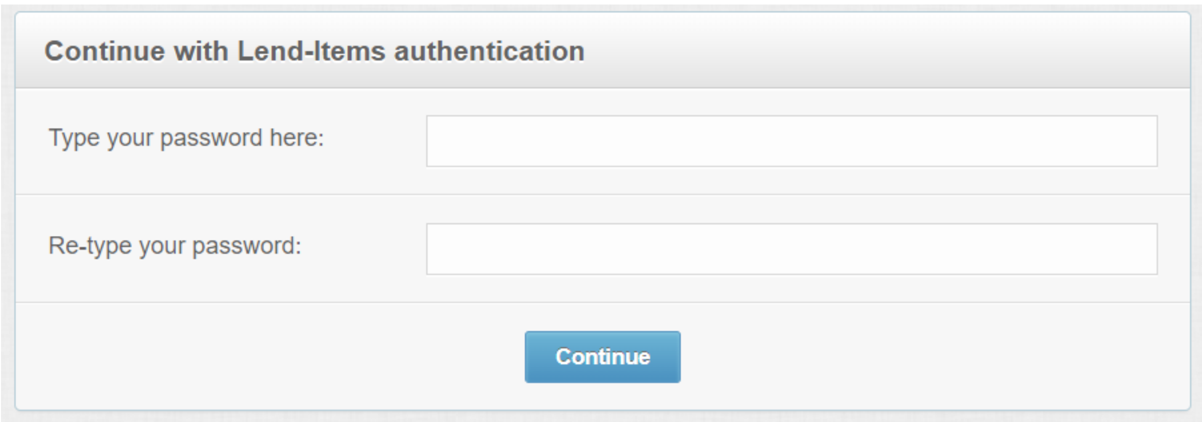
The user can then select either Lend-Items if they want to use Lend-Items authentication (an email address and password held in Lend-Items), or they can choose a third party authentication provider such as Google, Facebook or Yahoo.

If the user chooses a third party authentication provider such as Google, Facebook or Yahoo, then the system will ask them to re-enter the email address they would like to use, and then it will take them to the particular third party authenticator to complete the registration process.

For example, if they choose Google, they will see something like the following;

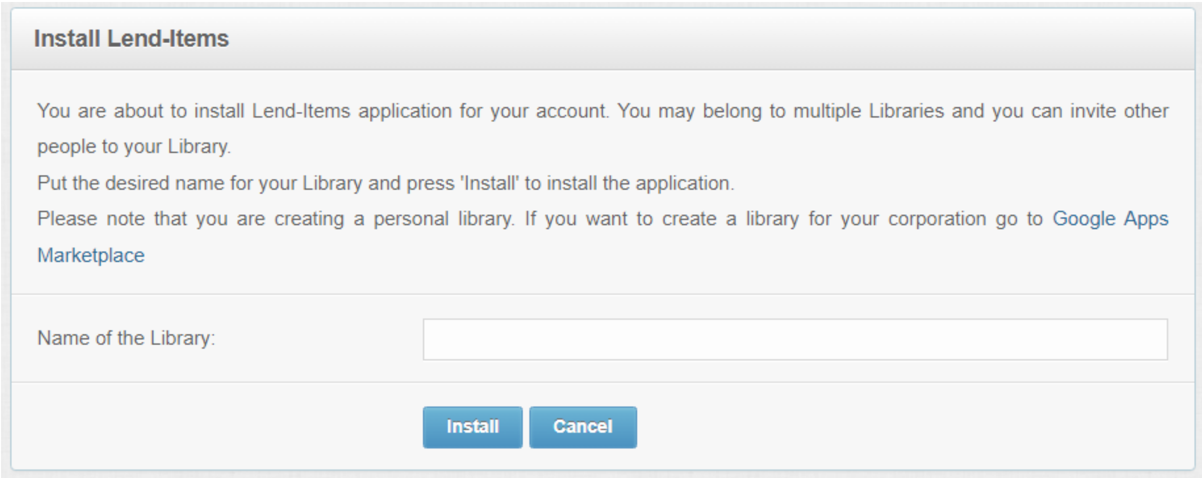


If they don't choose a third party authentication provider such as Google, Facebook or Yahoo but instead choose Lend-Items, then an additional section will show, where they need to create a specific password always to be used when logging into Lend-Items with this email address.



Later, when logging in to Lend-Items, the user must login using the same authentication provider they used to originally authenticate themselves.

After logging in via LendItems authentication or a third party authentication provider, the user will then be taken to the “Install Lend-items” dialogue and asked to enter a name for the new library they want to create.

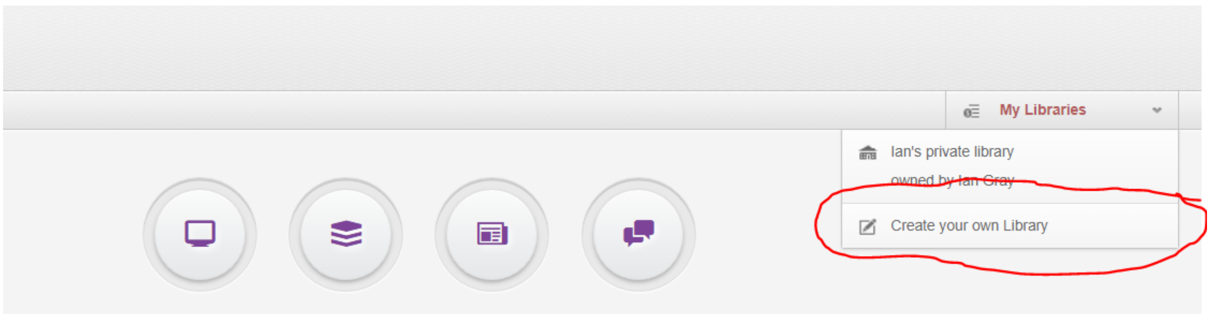


After entering the name of the new Library and clicking on the Install button the user will be brought to the main dashboard of the LendItems web application.

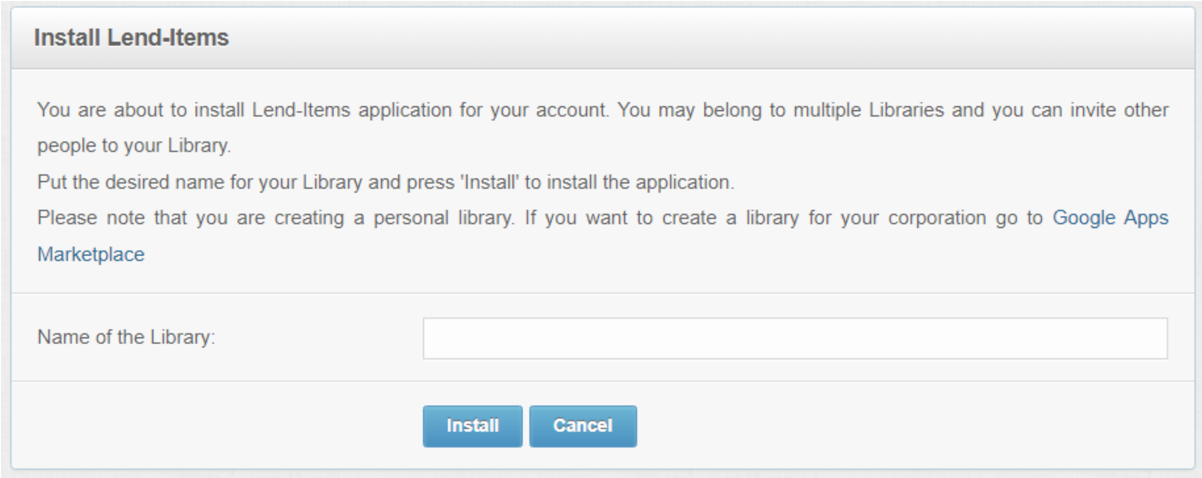
Existing LendItems User

If a User has been invited to a library and signed up for that Library but has not yet created their own library, then they can create a library for themselves. Note that each email address can only create one LendItems library. If you need more than one Library you will need to create the second library using a different email address.

If a User already belongs to another library, they can create their own library by clicking on the Library drop down menu in the top right corner of the dashboard, and select “Create your own library” as shown below.



This will lead the User to the “Install Lend-items” dialogue where they can enter in the name of the library they wish to create.



After entering the name of the new Library and clicking on the Install button the user will be brought to the main dashboard of their new LendItems Library.

Library Types

Anyone can create a library at www.lend-items.com but there are two types of libraries that get created; normal libraries and Google Workspace (G Suite) libraries.

User Types

LendItem Users are divided into 4 categories;

- Owners
- Payers
- Administrators
- Normal Users

Owner

The user who created the LendItems library is classified as the Owner of that library. It is possible to assign the ownership of a library to another user. To do this, ensure that the User is made an Administrator and then contact LendItems Support to ask for the transfer of ownership to be made.

Currently, a User (as identified by an email address) can only be the Owner of one library. It is not possible for one user to create multiple libraries, though a user can be a member of multiple libraries. To create another library, the User would need to do this using a different email address for this.

Payer

The User who subscribes to a paid subscription through the PayPal payment system for a library is classified as the Payer for this library.

Administrator

A User which has been made an Administrator of a LendItems library has full access to all parts of the library and are able to use all features of the library such as;

- Creating and editing Items
- Creating and editing Item Categories
- Adding and Editing Users
- Lending and returning items to users
- Changing library settings
- Searching and browsing for Items
- Booking and Reserving

Any User can be elevated to the category of an Administrator by either another Administrator or the Owner of the LendItems Library.

The exception to the above is that only the Owner of a LendItems Library has access to a small set of certain settings in the Library.

Normal User

A normal User has limited access to all the functionality of a LendItems library and can only do the following;

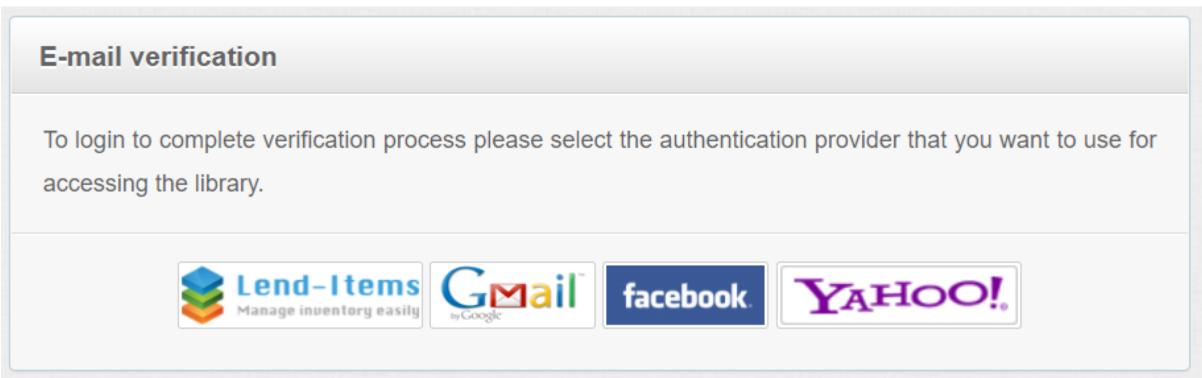
- Searching and browsing for Items
- Booking and Reserving

A User can belong to as many libraries as they want to and are invited to.

Normal Libraries

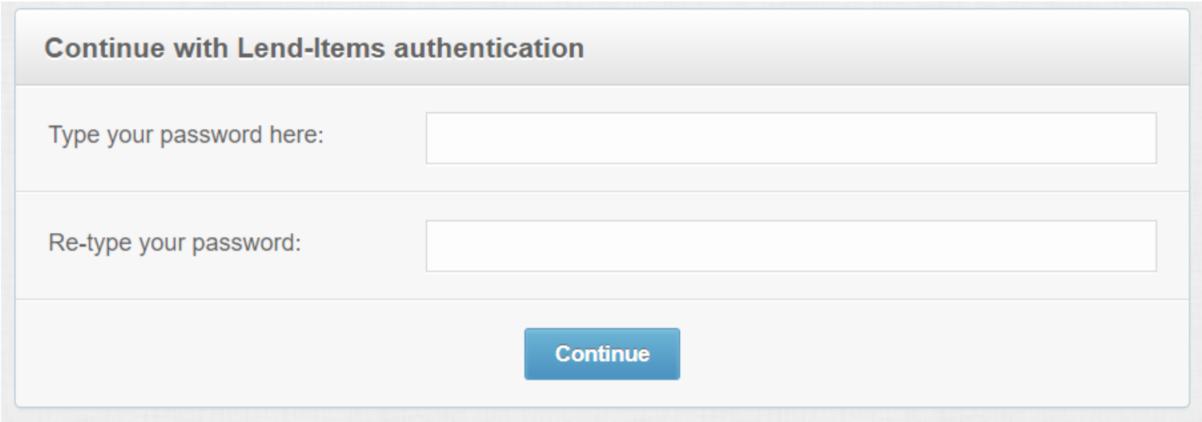
When a new user is created in Lend-Items, an invitation email with a link will be sent to that user, inviting them to register with your library. When the user receives the invitation email, it will invite them to click on the link in this email in order to complete the registration.

After clicking on the link in the invitation email, it will present a screen like the following;



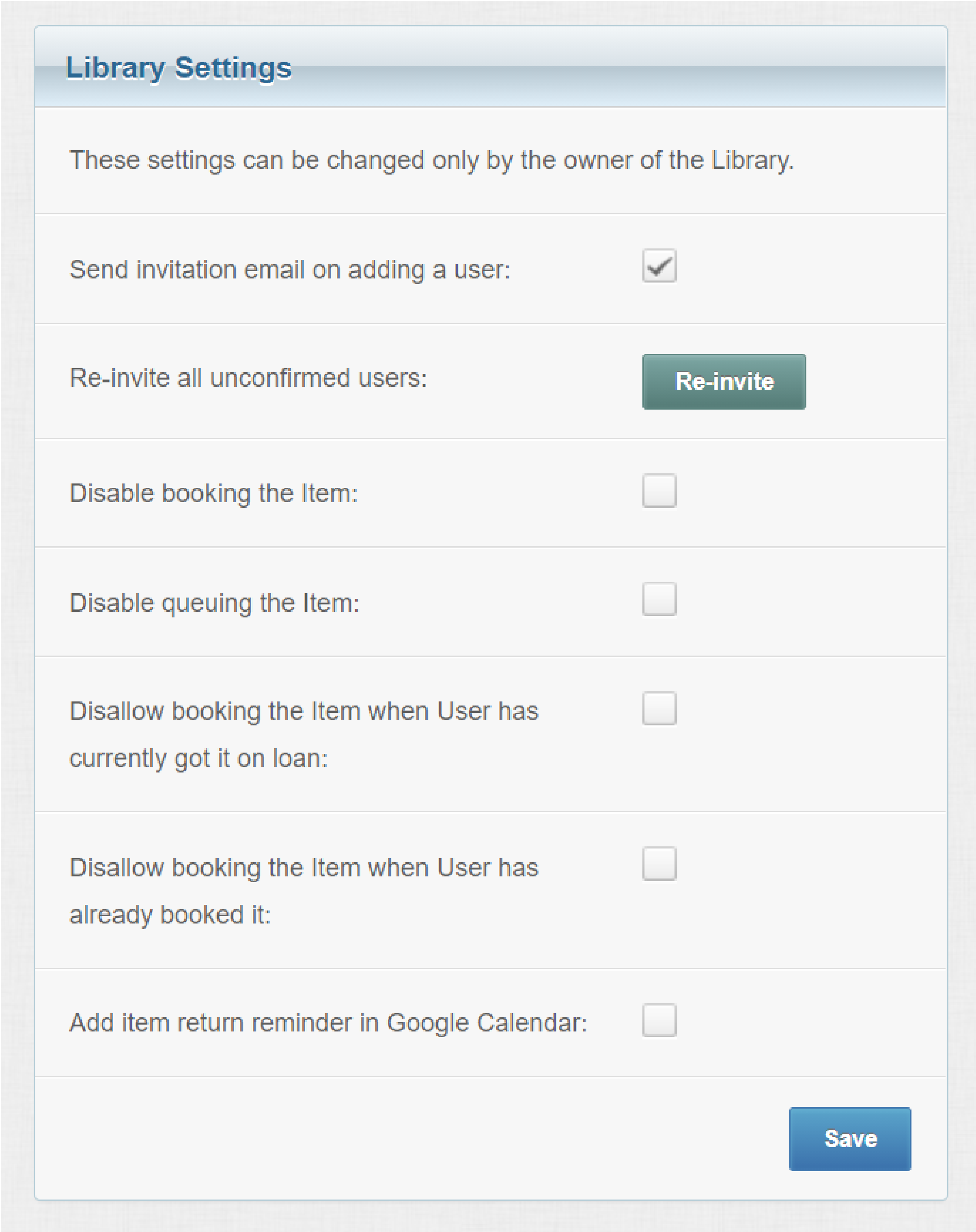
The user can then select either Lend-Items if they want to use Lend-Items authentication (an email address and password held in Lend-Items), or they can choose a third party authentication provider such as Google, Facebook or Yahoo.

If they choose Lend-Items, then an additional section will show, where they need to create a specific password always to be used when logging into Lend-Items with this email address.



If the user chooses a third party authentication provider such as Google, Facebook or Yahoo, then the system will ask them to re-enter the email address they would like to use, and then it will take them to the particular third party authenticator to complete the registration process.

Note that the option of sending an invitation email when a new user has been created can be turned off by the owner of the library by unchecking the “Send invitation email on adding a user” option. See below.



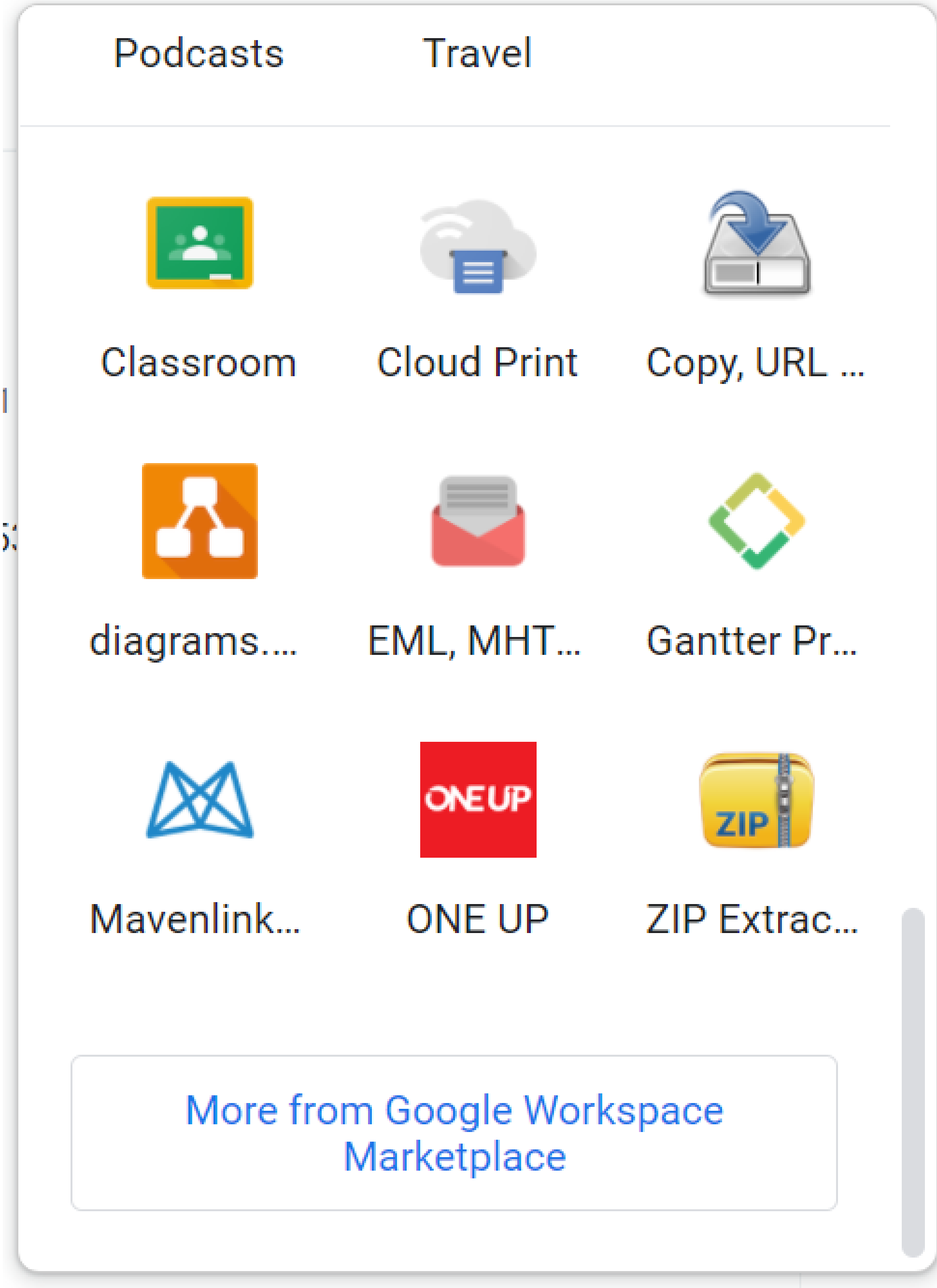
Google Workspace Libraries

Google Workspace (formerly G Suite and before that Google Apps for your Domain) provides a company or organization certain apps such as email, docs and sheets for all the users of a particular domain. For example, if your company uses the domain www.mybiz.com then each person in the company can be provided with an email address such as myname@mybiz.com and these users can collaborate together on documents.

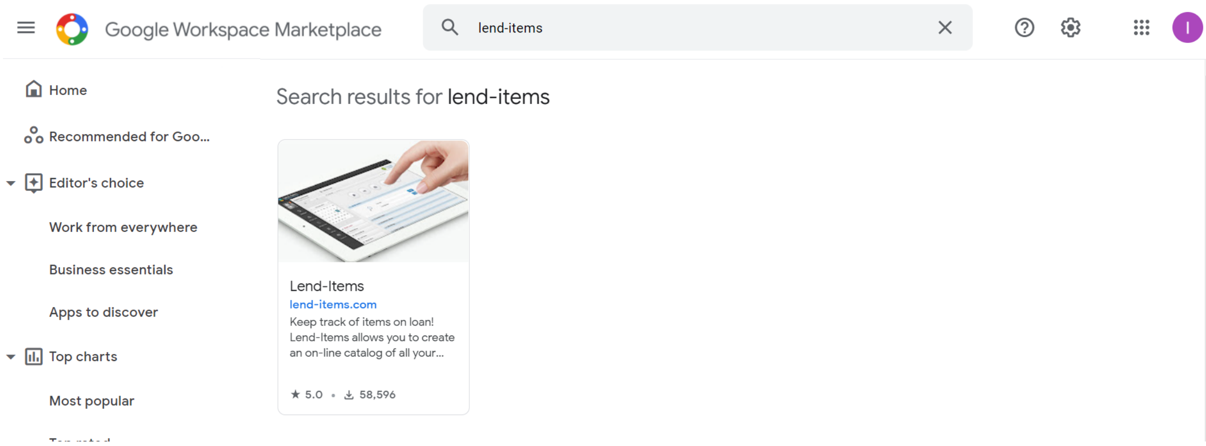
Lend-Items allows administrators of a Google Workspace domain to create a lend-items library for the members of its domain. Google Workspace Libraries offer two benefits for the members of your domain;

a) The Lend-Items app will appear in the list accessed via the Google Apps icon
b) They do not need to register or authenticate themselves. When they access Lend-Items they will be automatically registered and added to the list of Lend-Items users.

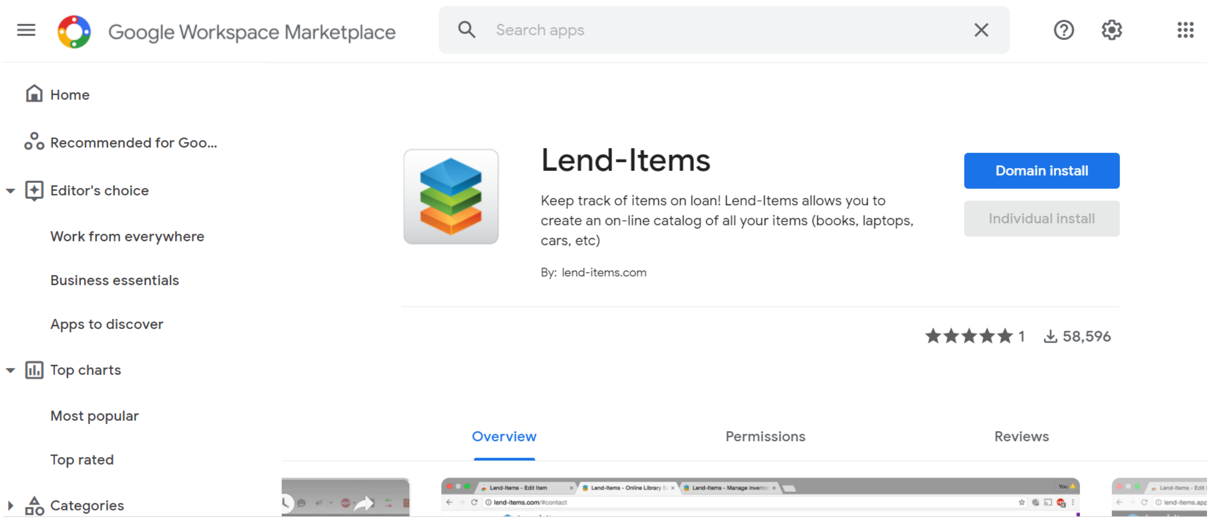
To create a Google Workspace lend-items library, log in to your Google Workspace email account as an administrator, and go to the Google Workspace Marketplace, by clicking Google Apps 9 dots icon , scroll down to the bottom and click on More from Google Workspace Marketplace.



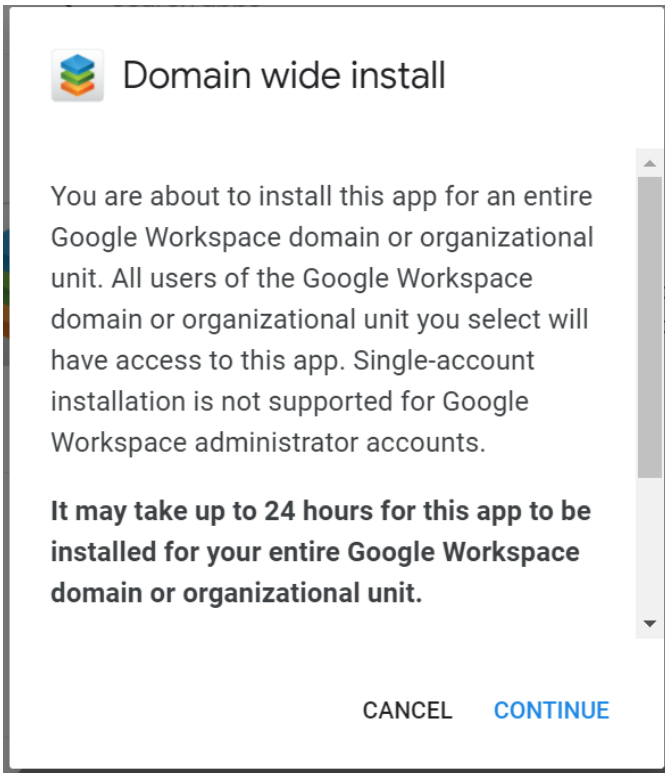
In the search field type lend-items and perform the search. This will show the application. If the Lend-Items application does not show, it means you are not an administrator of this domain.



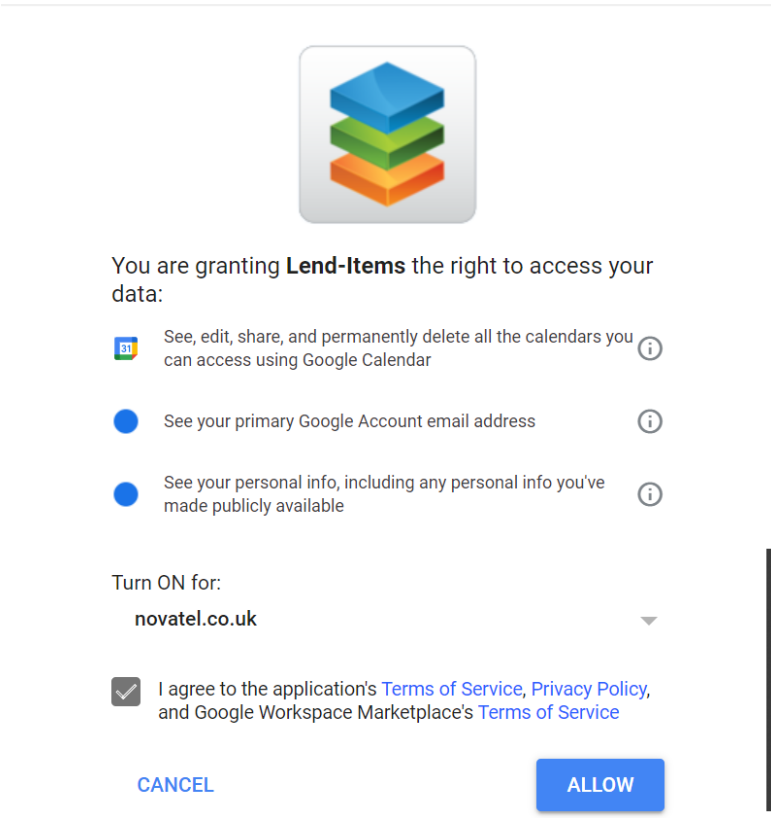
Click on the Lend-Items app to move to the next page;



Now click on the Domain Install button and the following dialog will appear.

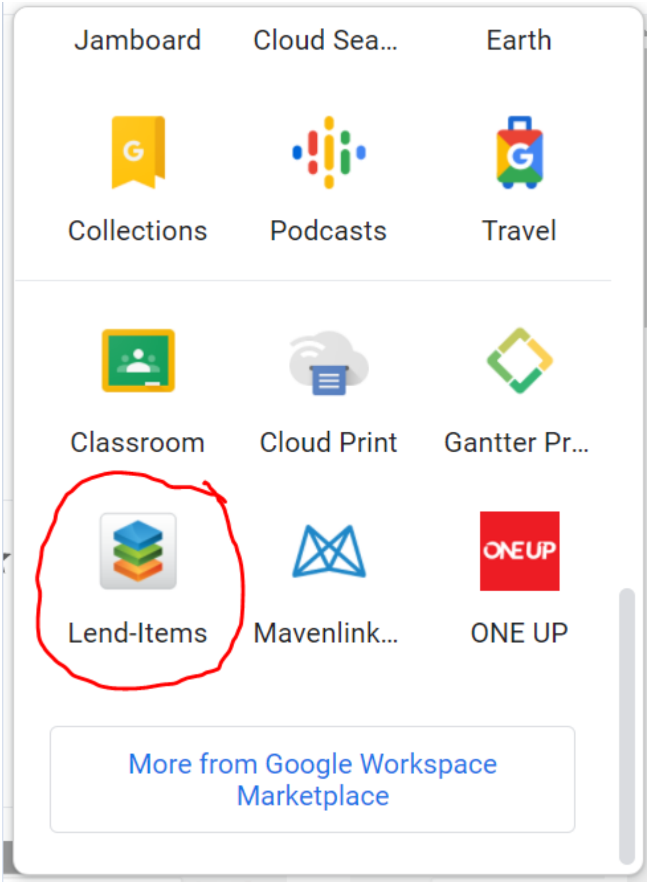


After clicking on the Continue button, the following dialog will appear.



Click on the ALLOW button to complete the process of adding Lend-Items as an App to your domain.

Now when you go to your Google Apps you should see the Lend-Items app as shown here.



As well as this appearing for you the administrator of this domain, this Lend-Items app icon will also appear in the Google Apps menu for all your users.

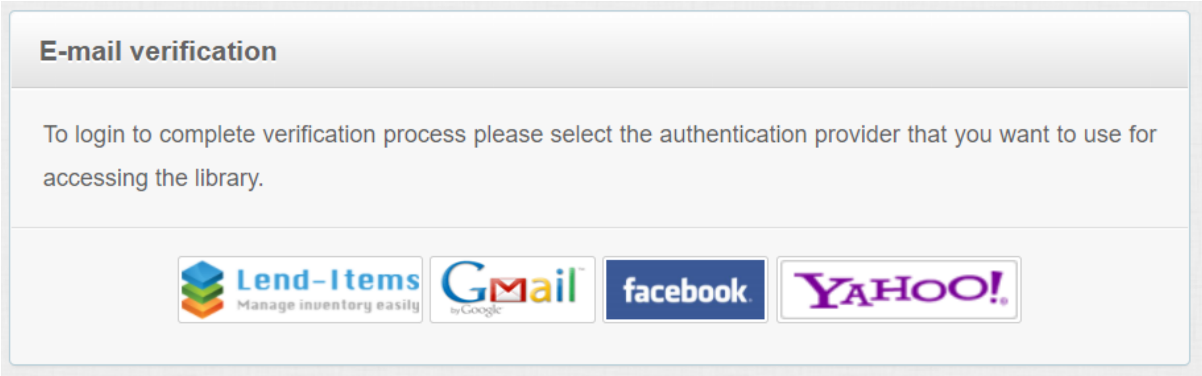
Registering a New User in a library

The process for registering a new user in a library is dependent on whether the library is a normal library or a Google Workspace Library.

Normal Libraries

When a new user is created in Lend-Items, an invitation email with a link will be sent to that user, inviting them to register with your library. When the user receives the invitation email, it will invite them to click on the link in this email in order to complete the registration.

After clicking on the link in the invitation email, it will present a screen like the following;

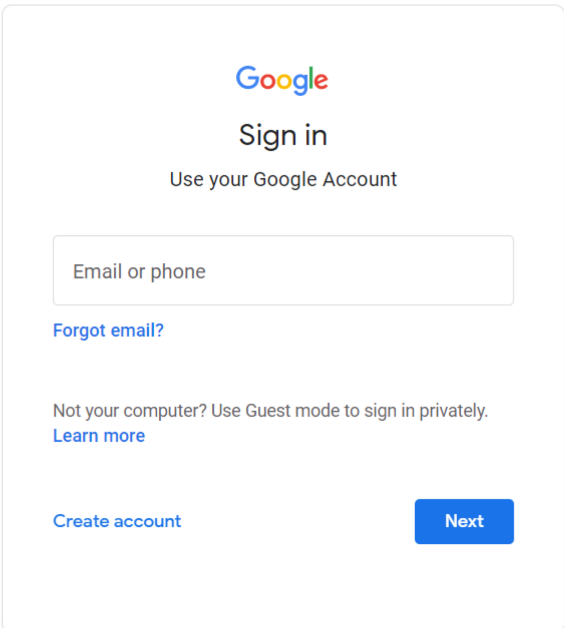


The user can then select either Lend-Items if they want to use Lend-Items authentication (an email address and password held in Lend-Items), or they can choose a third party authentication provider such as Google, Facebook or Yahoo.

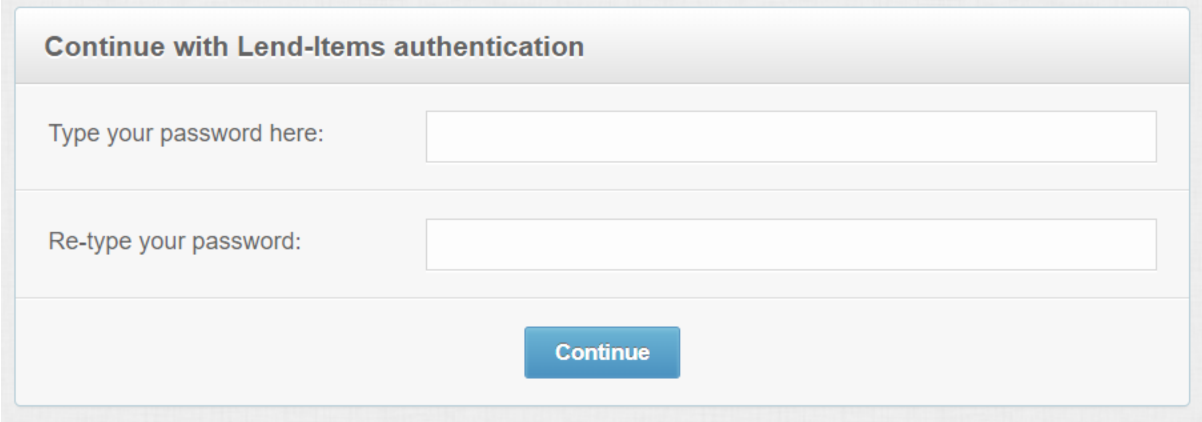
(Due to implementation complexity LendItems does not integrate with Active Directory or Exchange server as this requires configurations on Customer and Supplier side to work).

If the user chooses a third party authentication provider such as Google, Facebook or Yahoo, then the system will ask them to re-enter the email address they would like to use, and then it will take them to the particular third party authenticator to complete the registration process.

For example, if they choose Google, they will see something like the following;



If they don't choose a third party authentication provider such as Google, Facebook or Yahoo but instead choose Lend-Items, then an additional section will show, where they need to create a specific password always to be used when logging into Lend-Items with this email address.



Notes.

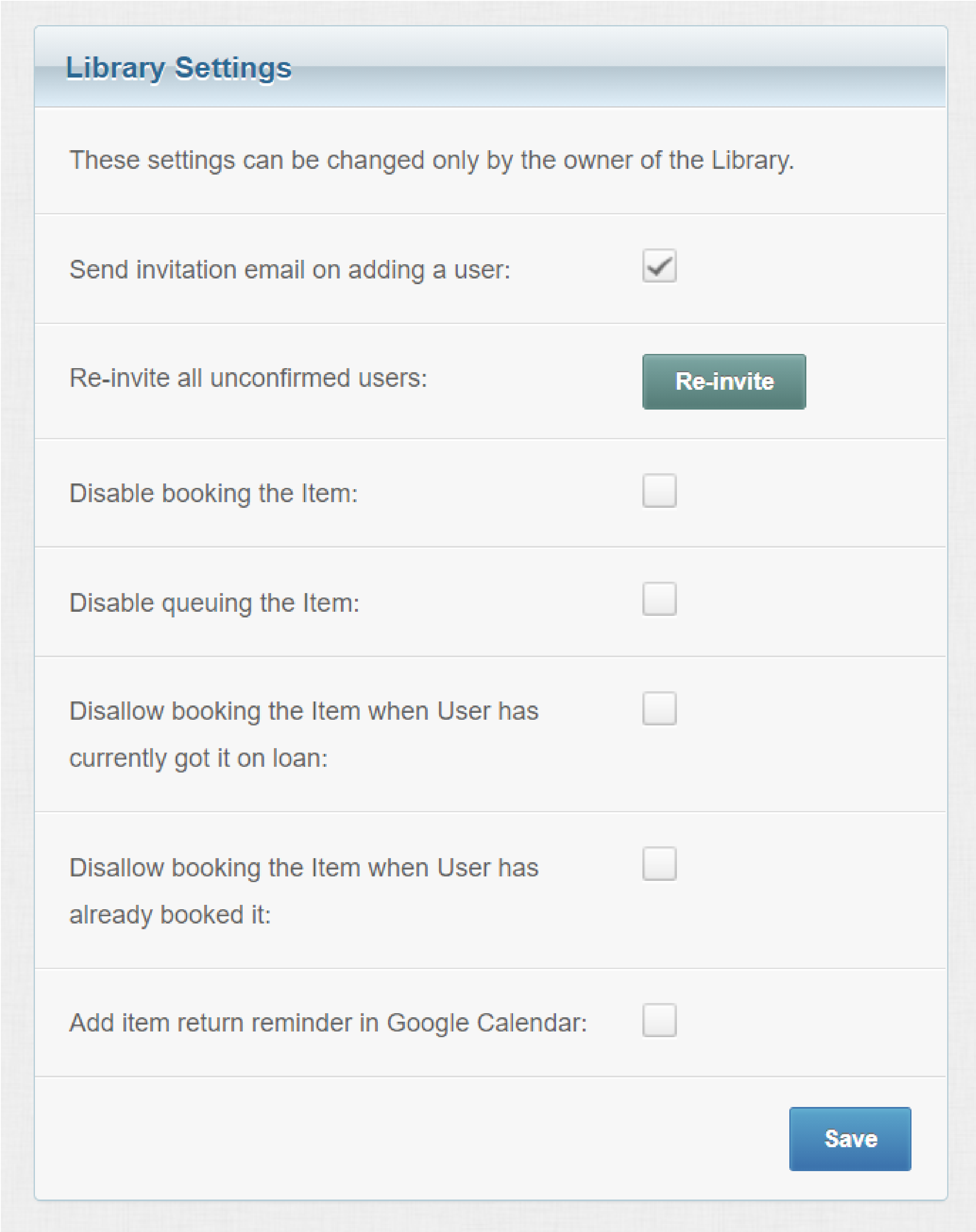
Once a user has authenticated themselves, they should not use that invitation link again. Instead, they should follow the normal procedure for logging in, described elsewhere.

Please note that the email address for authenticating must be the same as that used when inviting the person to the library.

If the user wants to use a different email address then there are two options available;

1) Authenticate by a third party authenticator such as Google, and use the email address they were invited to.
2) Request their library administrator to use for their account the email address they would like to use. After changing the email address, the library administrator will need to re-invite the user, in order to get the new invitation email sent with the new link in it.

Note that the option of sending an invitation email when a new user has been created can be turned off by the owner of the library by unchecking the “Send invitation email on adding a user” option. See below.



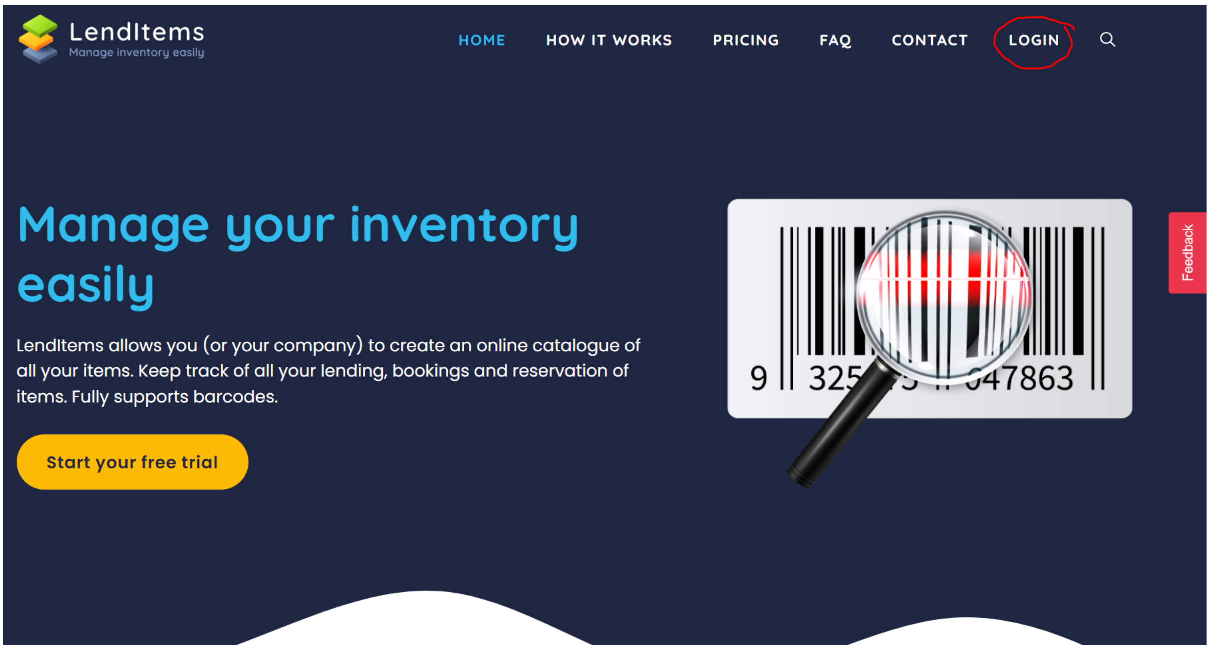
Google Workspace Libraries

In Google Workspace libraries, there is no need to register new users if the new user is a member of the Google Workspace domain. All they need to do is simply click on the Lend-Items app in their Google Apps list, and the first time they do this, then they will be added as a user of this Lend-items library.

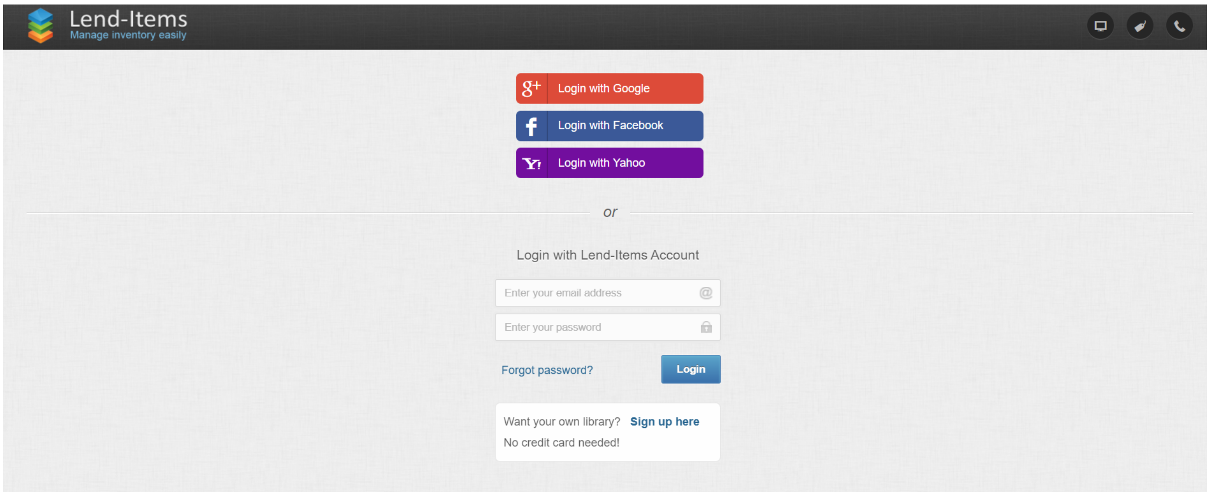
Logging In

Authenticated users can login to the system using either Lend-Items authentication (an email address and password held in Lend-Items), or use a third party authentication provider such as Google, Facebook or Yahoo.

To login first go to https://lenditems.com/ and click on the Login button as shown here.



The following screen will appear. Here you should choose the appropriate way to login.



When logging in to Lend-Items, the user must login using the same authentication provider they used to originally authenticate themselves.

For example, if they have Google Authentication, then when they login they must click on the red g+ Login with Google button. If they have Google Authentication but then try to enter their email and password into the Login with Lend-Items Account fields, this will fail and they will get the error message shown here.

Your account is linked with Google, Please click on the correct login button above to access your library.

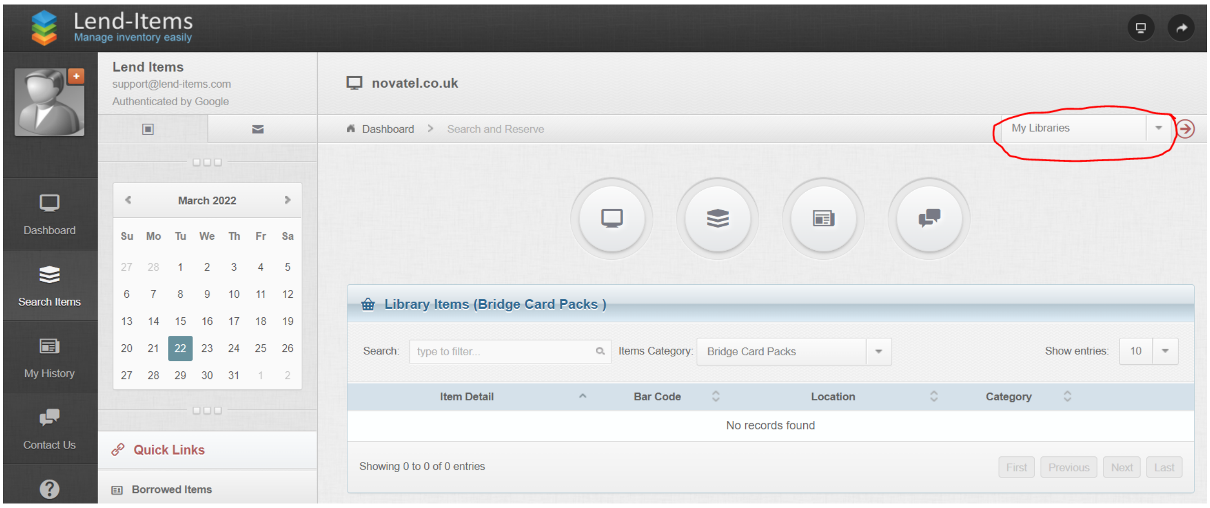
If an unknown email address is entered into the “login with Lend-Items Account” fields, or an incorrect password is used, the following Error message will appear.

Email or password does not match. Please try again.

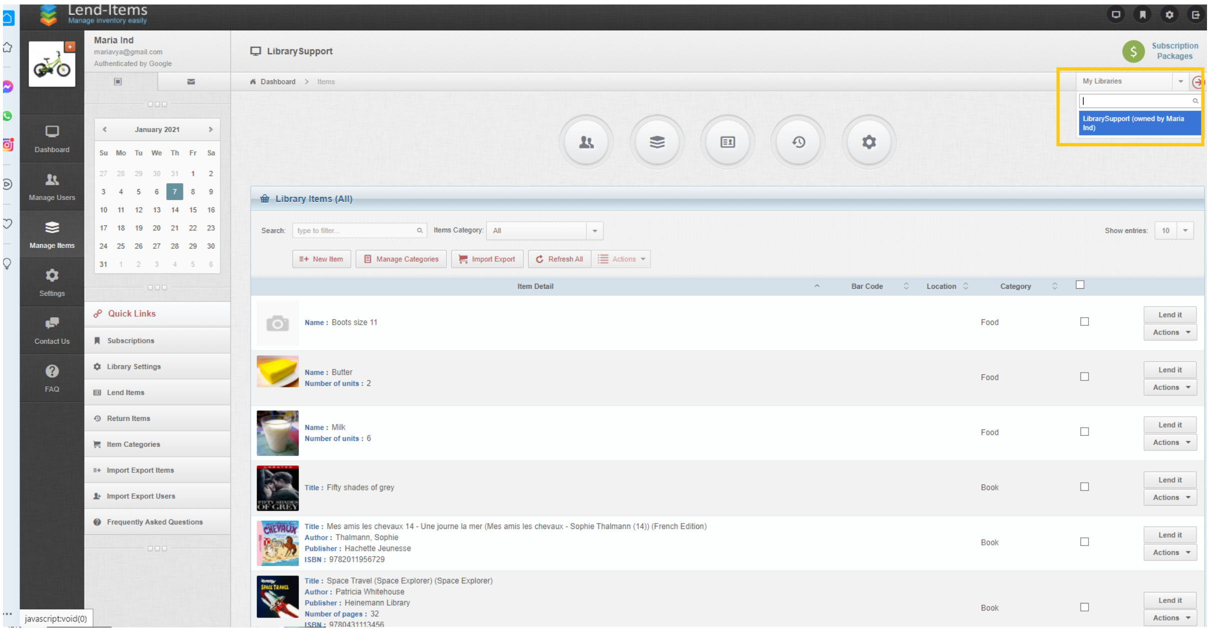
Choosing Library

To switch between libraries you belong to, click on the dropdown list My Libraries on the top right corner and select the desired library. The screen displayed will depend on whether you are a normal user or an administrator. See next section for more information.

If you are a normal user you will see a screen similar to the following where you can select the library.

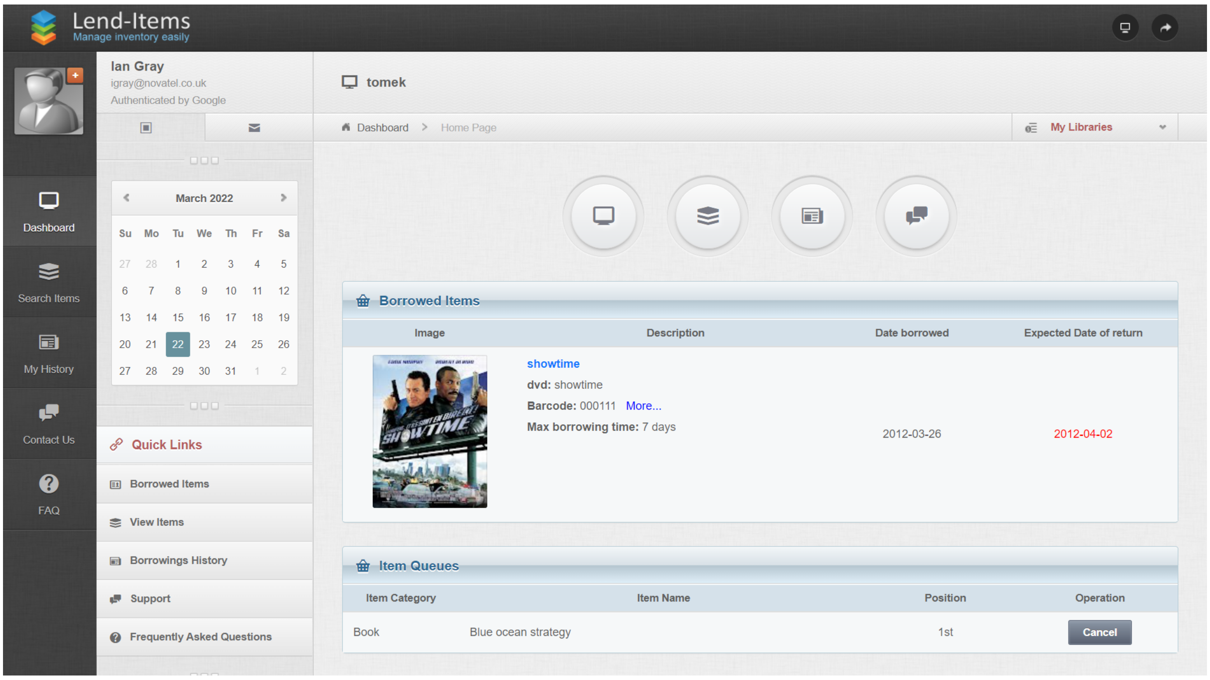


Or if you are an administrator of the library you have logged into you will see a screen similar to the following.



User Panel

When a user logs into a library, they will be presented with their Dashboard showing what items they have currently borrowed and any reservations they might have, as shown below.



A user can do the following;

- View their Dashboard showing their borrowed Items, bookings and reservations.
- Search for Items and book or queue for them.
- Review their borrowing history
- Contact a Library Administrator
- Search the FAQ and ask questions

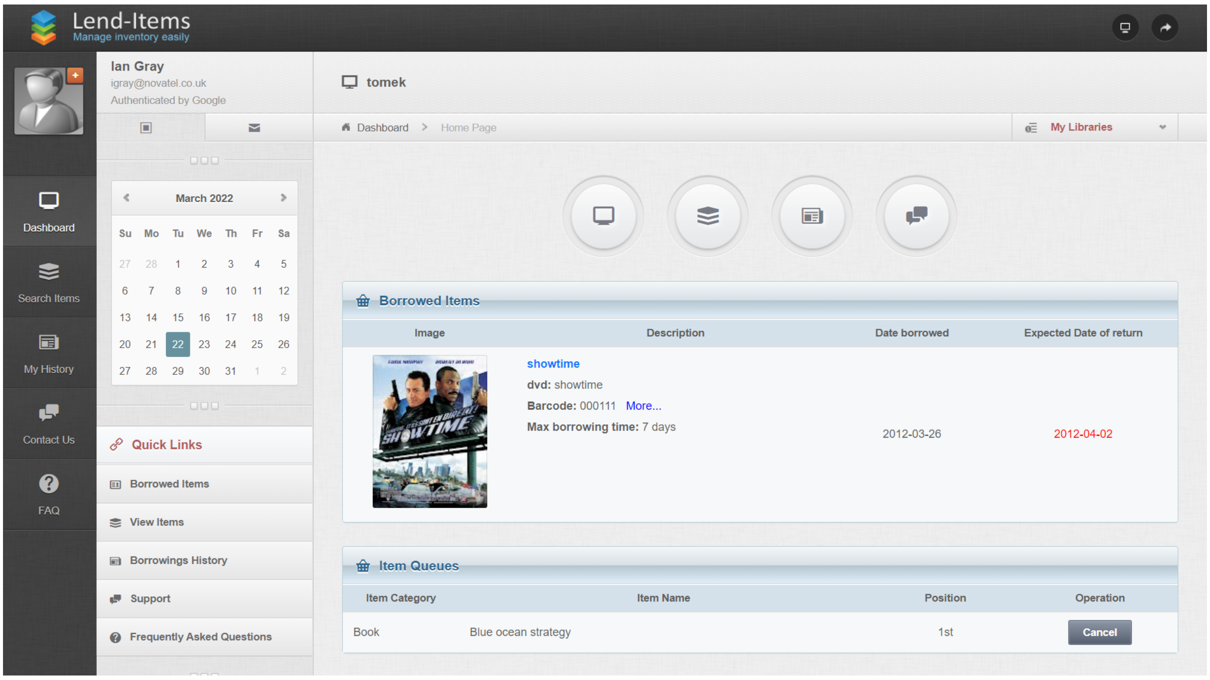
Dashboard

The Dashboard is like the homepage for the User. From this page they can view the list of their currently borrowed items, and see any bookings or items they are queued on.

Any reservations either bookings or queues of an item, can be easily canceled on this page.

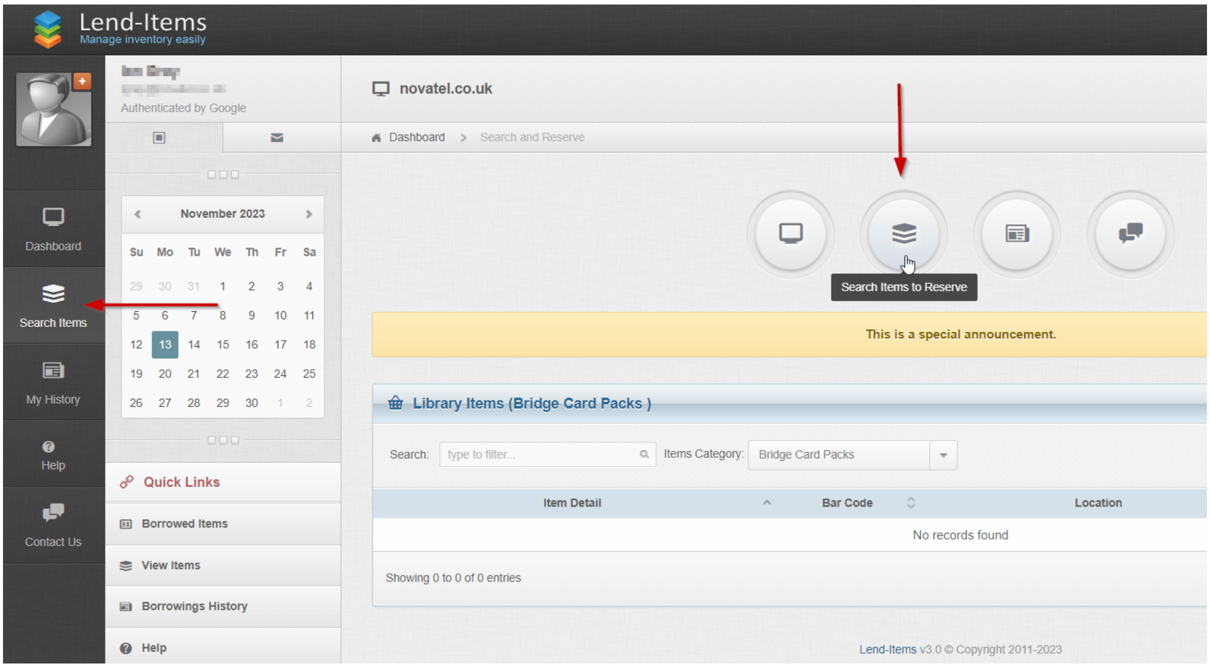
From this page there are links and buttons they can press to access other parts of the interface, the principle being;

- Search Items to reserve
- View Borrowing History
- Access Support

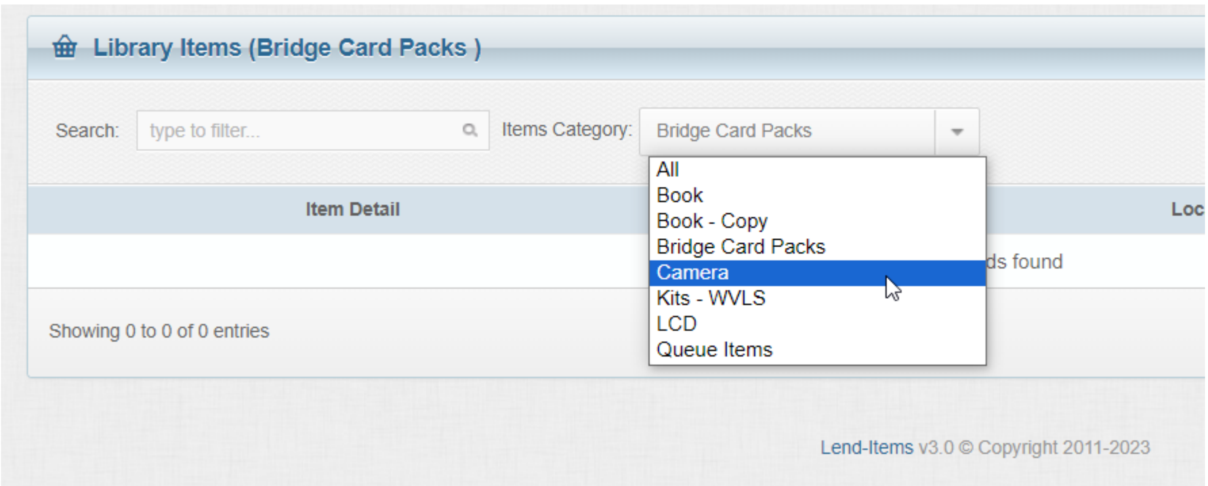


Search

To search for an item, Click on the “Search Items” button on the left or the “Search Items to reserve” button, as shown below.

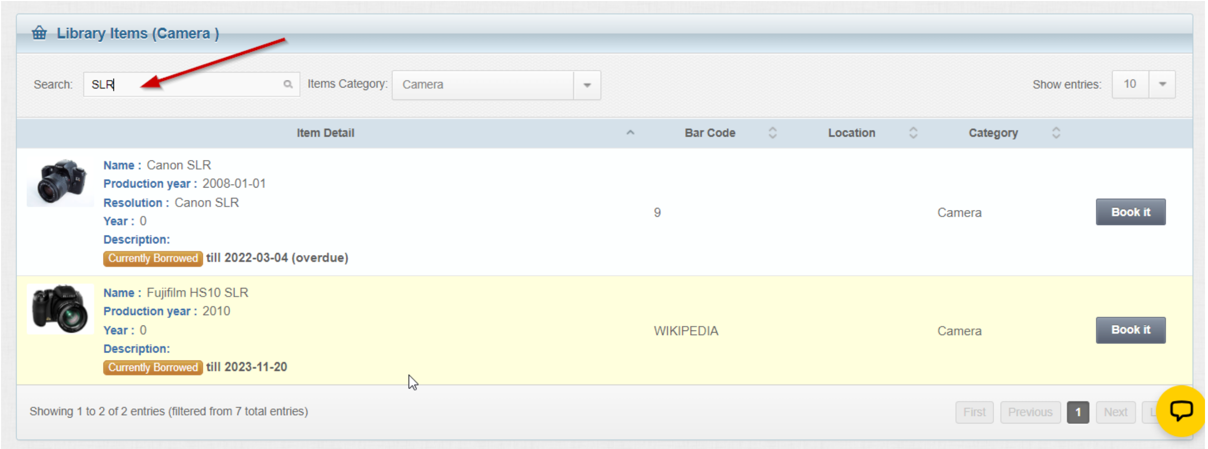


Items are divided into categories, so before searching for the desired item, first select the particular Item category of interest by clicking on the Item Category drop down list and selecting the Category of interest.

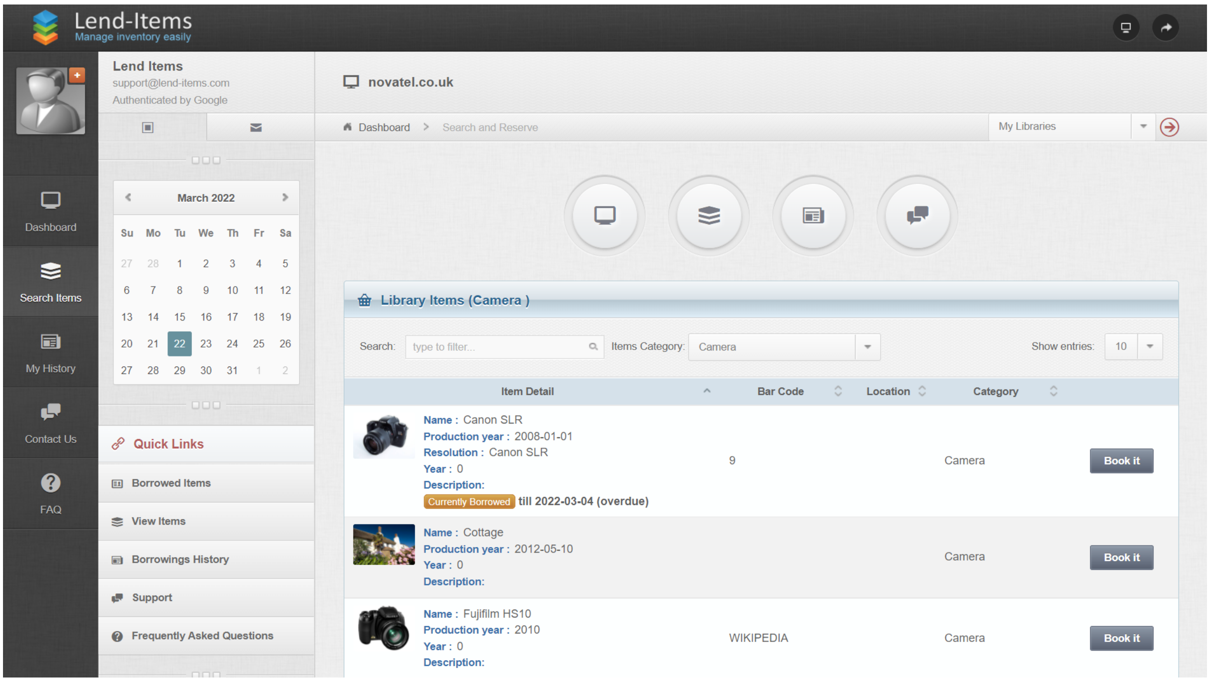


Alternatively, “All” can be selected to search all Item categories at the same time, though the searches may be slower using this approach.

After the Item category has been selected, the user can enter the search criteria in the Search field, which will then show a list of items filtered according to the search criteria. This can be seen in the picture below.



Once an item of interest is showing in the list, the user has the opportunity to either Book it, or queue for the item, depending on the type of the Item.



Each Item category has what is called a Reservation Type, the options being Booking or Queue.

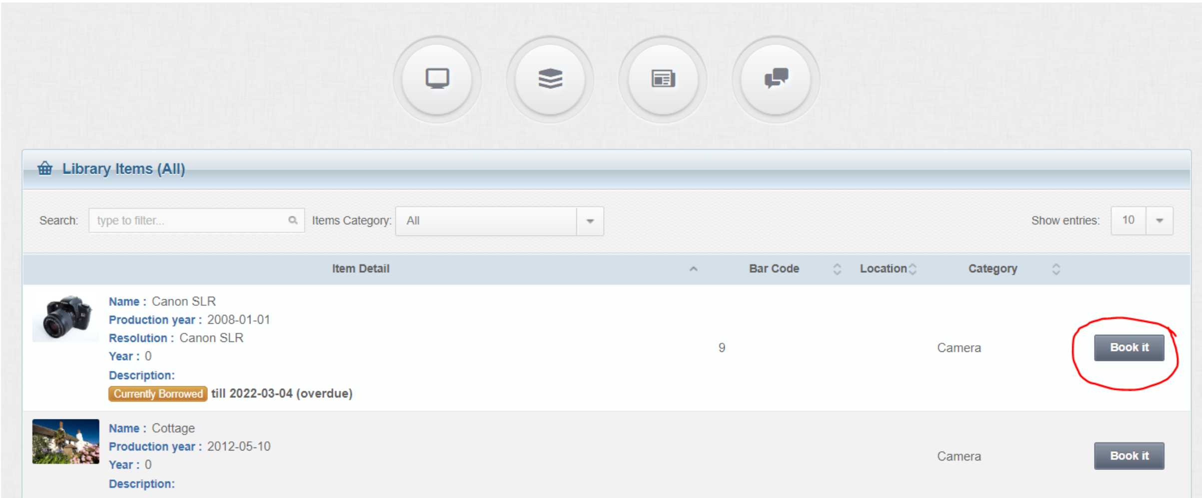
Booking is a reservation where the user specifies the dates/times when they want to borrow the Item (e.g. From April 25th to May 10th).

Queue is where the user places themselves in the queue of users who are waiting for this Item to become available.

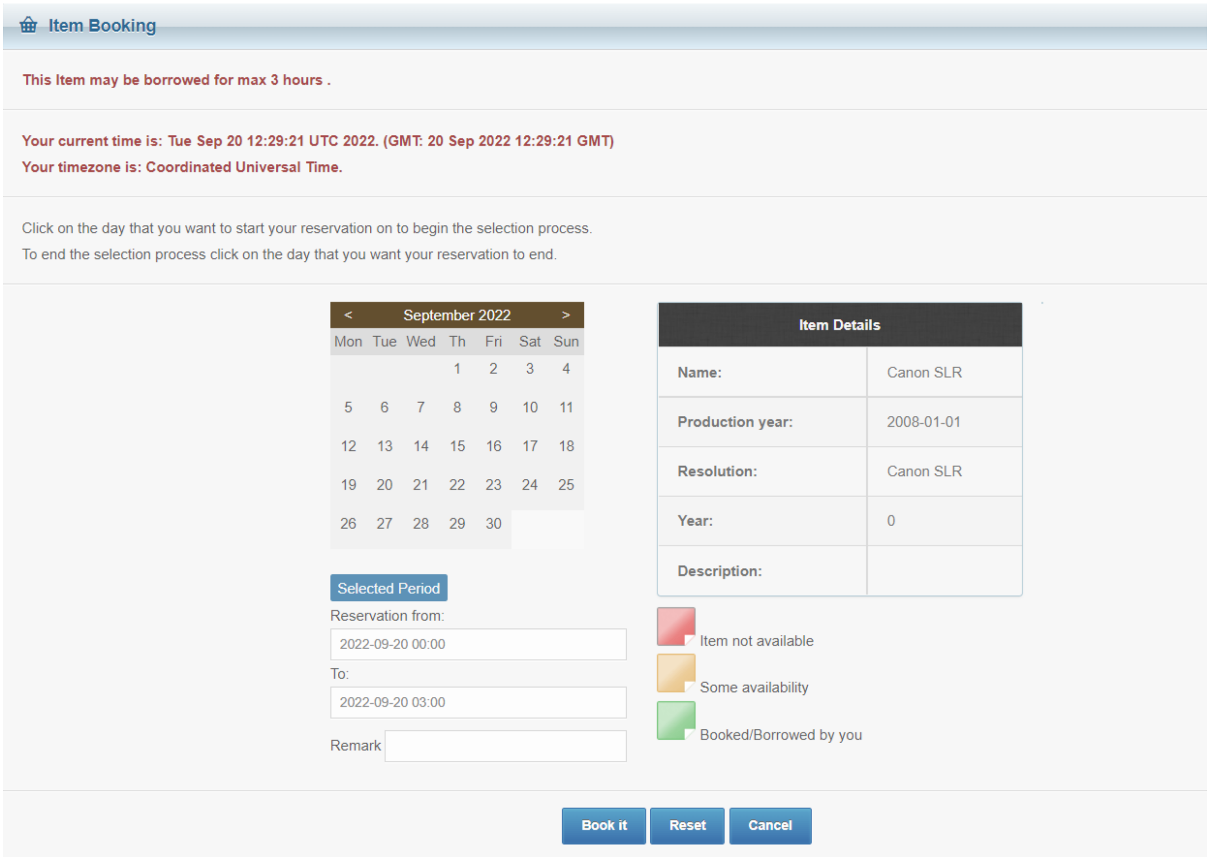
Note that Booking an item is not the same as lending an item. Booking an item is where you reserve it ahead of time. This can be compared to making a booking ahead of time for a hotel room. Lending is when you actually come and take the item.

Booking

To Book an item click on the Book it button for the Item you wish to reserve.



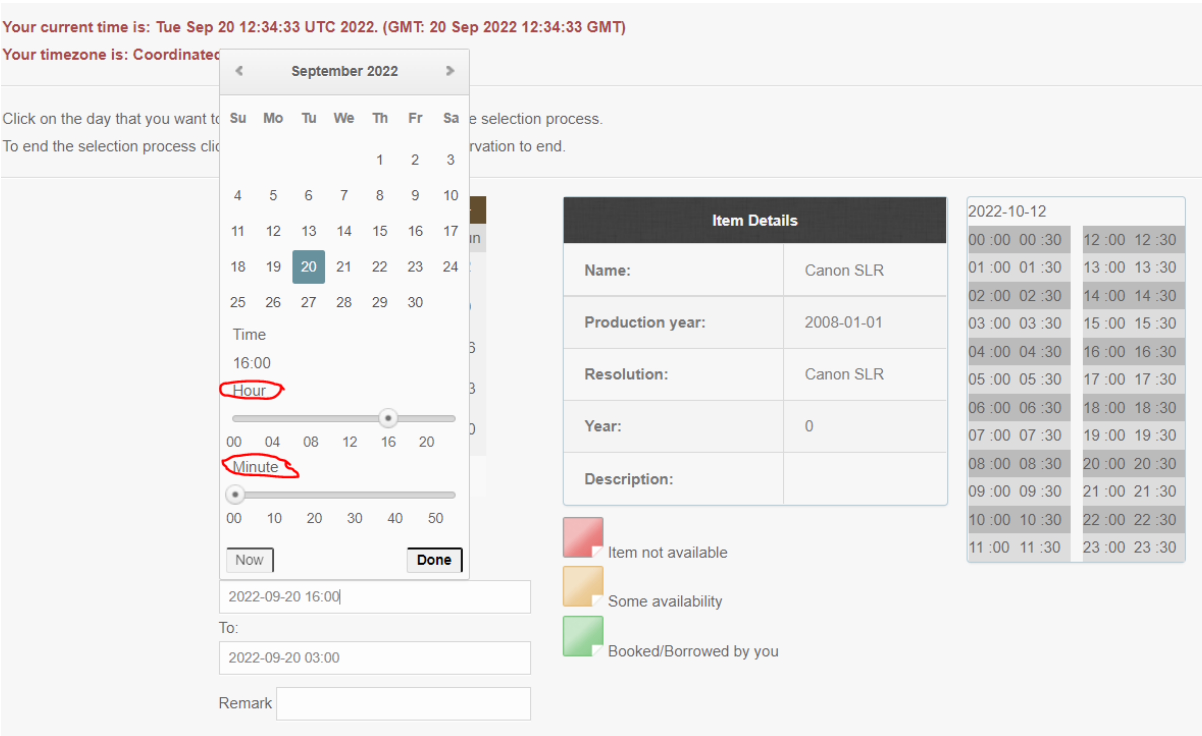
This will bring up the Item Booking screen for this Item.



Select the period of time for which you wish to reserve the item. Note that some items can be reserved for periods of days and some only for a number of hours. The maximum time the item can be reserved for will be shown at the top of this window.

The calendar is used to select the day or days to reserve the item for and the fields below the blue “Selected Period” title enable the user to specify the hours where this is appropriate.

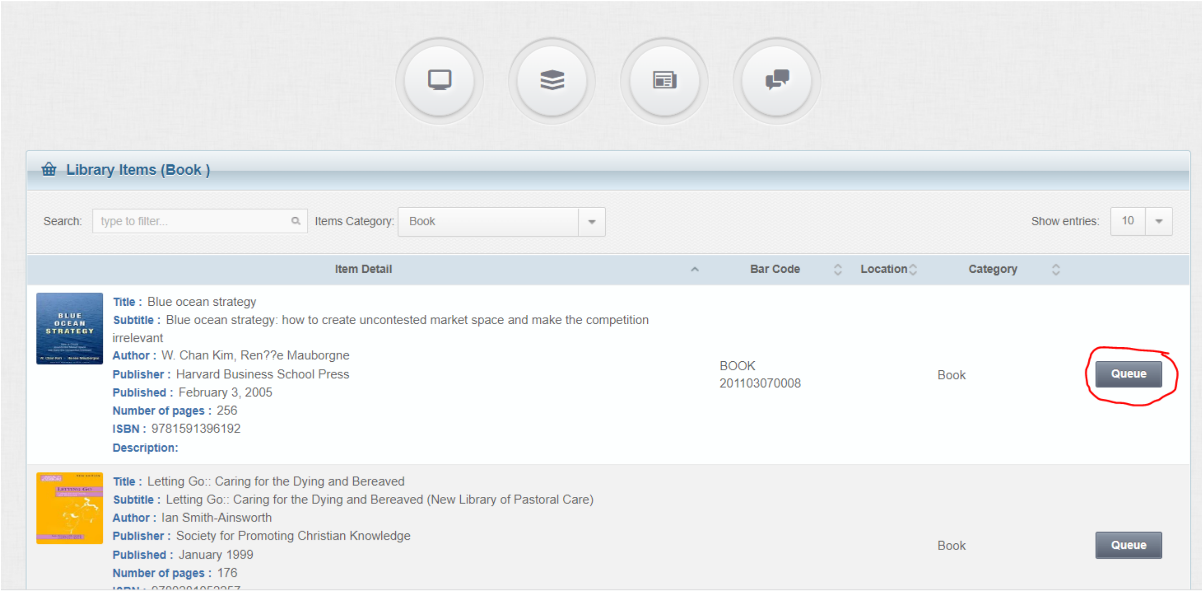
Clicking on the From: or To: fields will present to the user a calendar with hours and minutes enabling the user to select the time period for which they wish to make the booking.



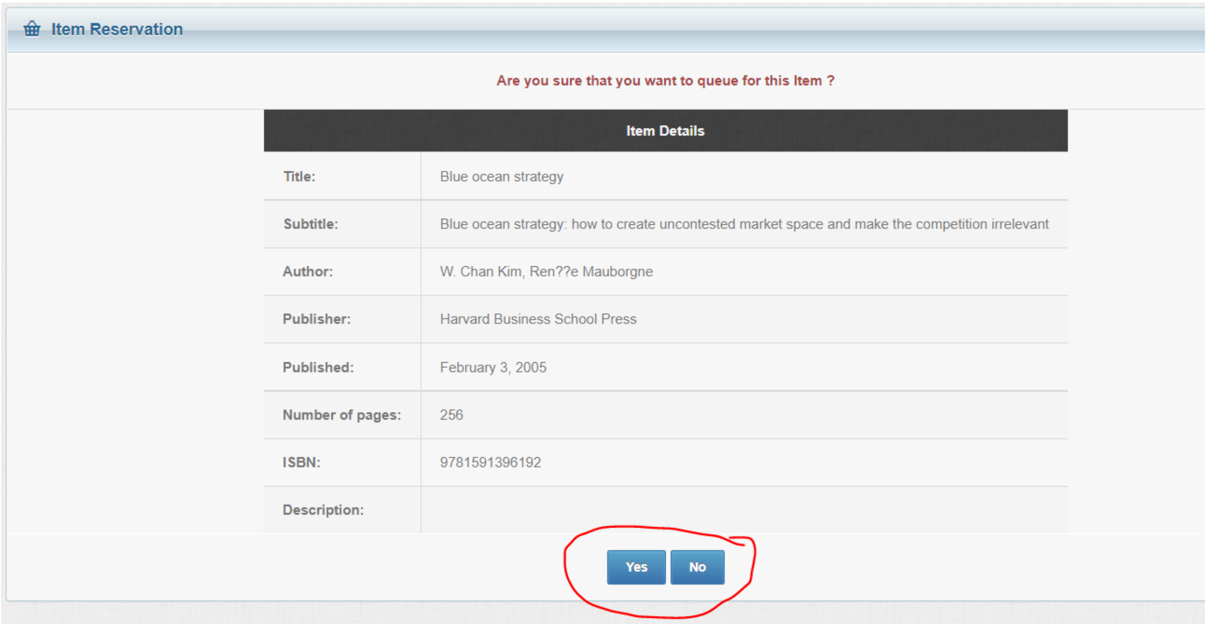
The calendar will also show when an item is not available or where it has already been booked by the User.

Queue

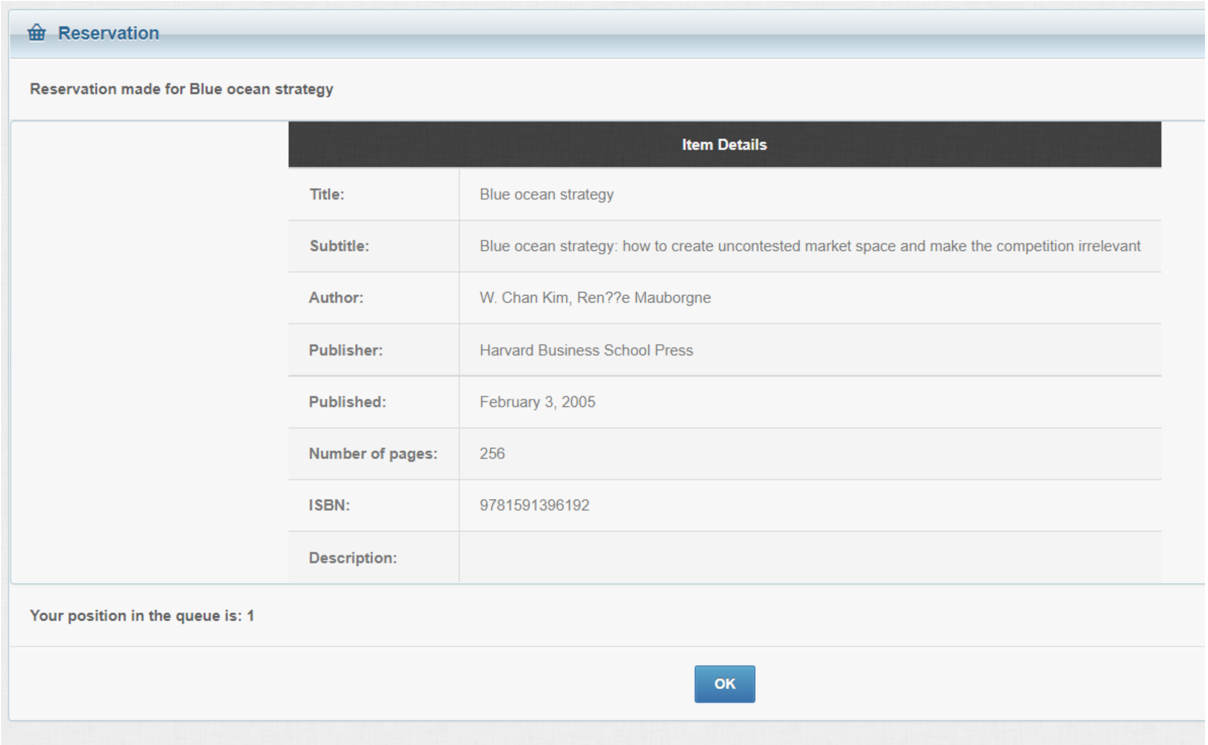
To queue for an item, click on the Queue button for the desired Item as shown below.



This will then prompt the user to confirm if they really do wish to queue for this item.

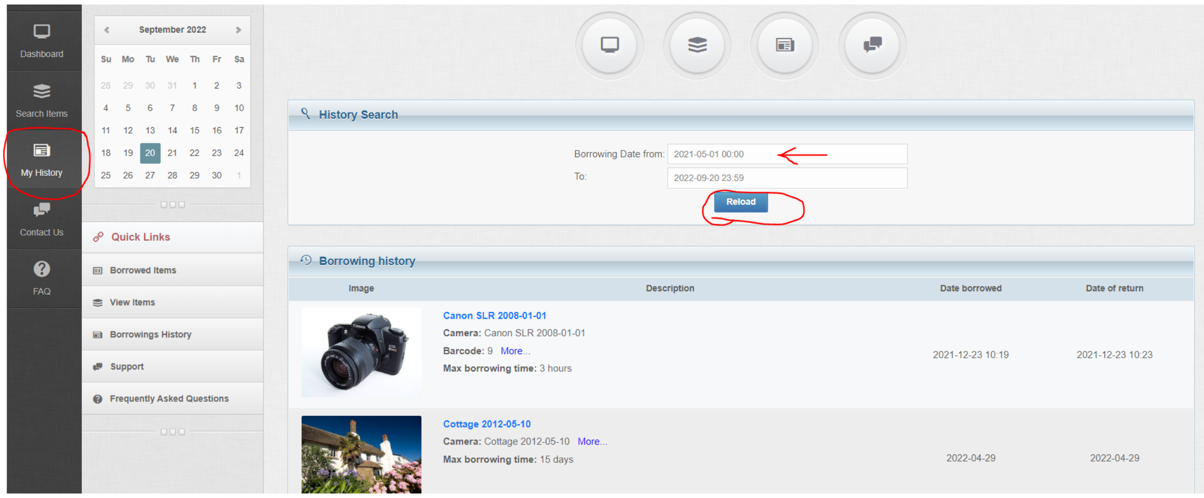


Press on Yes to enter yourself into the queue of users waiting on this item. After pressing Yes, the following screen will confirm the queue reservation and tell the user what position they are currently in the queue.



My History

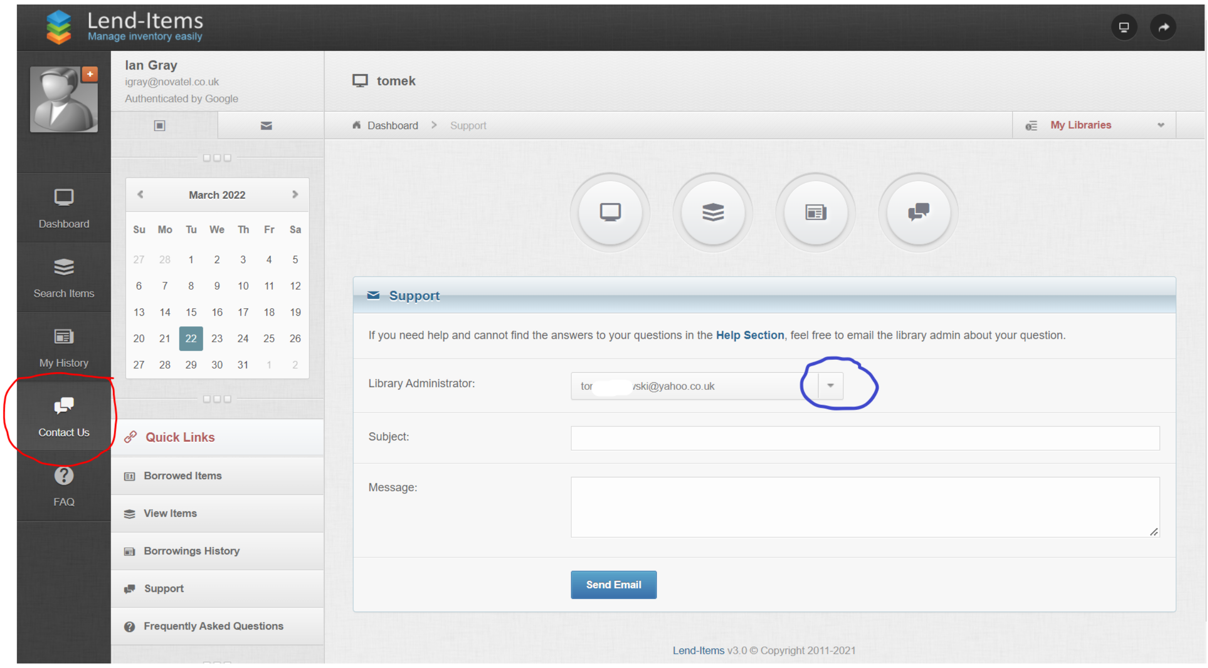
Clicking on the My History button enables the user to review their borrowing history.



To look back further in history, select the period to review in the Starting Date From: and To fields entering the desired date range.

Contact Us

To contact a Librarian Administrator from your library, click on the Contact Us button, and in the screen that appears, click on the drop down list to choose which administrator to send the message to. Type in a Subject, enter your question into the Message area and click the Send Email button as shown below.



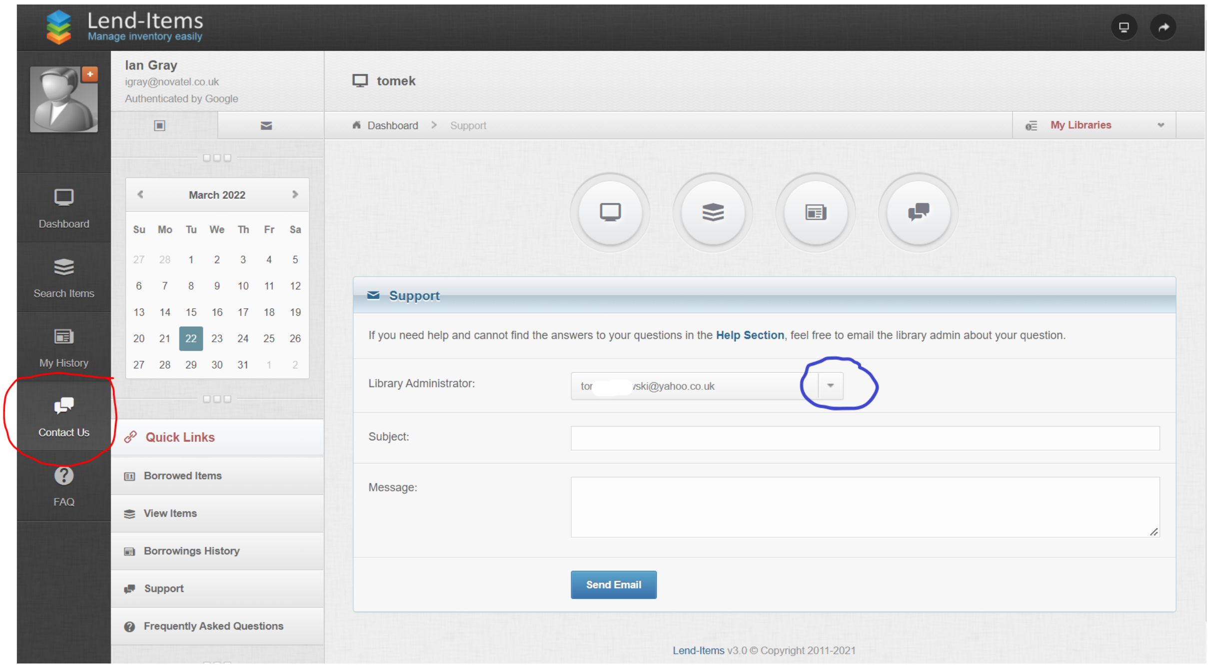
Contact Us

The “Contact Us” button has two different functions depending on whether you are in the User Panel or the Admin Panel (see below). When in the User Panel, the “Contact Us” button is for sending an email to one of the Library Administrators of your Library. When in the Admin Panel, the “Contact Us” button is used for sending an email to the Support Team at Lend-Items.

User Panel Contact Us

If you are in the User Panel and click on the Contact Us button, then it provides you with a means to contact your Librarian Administrator.

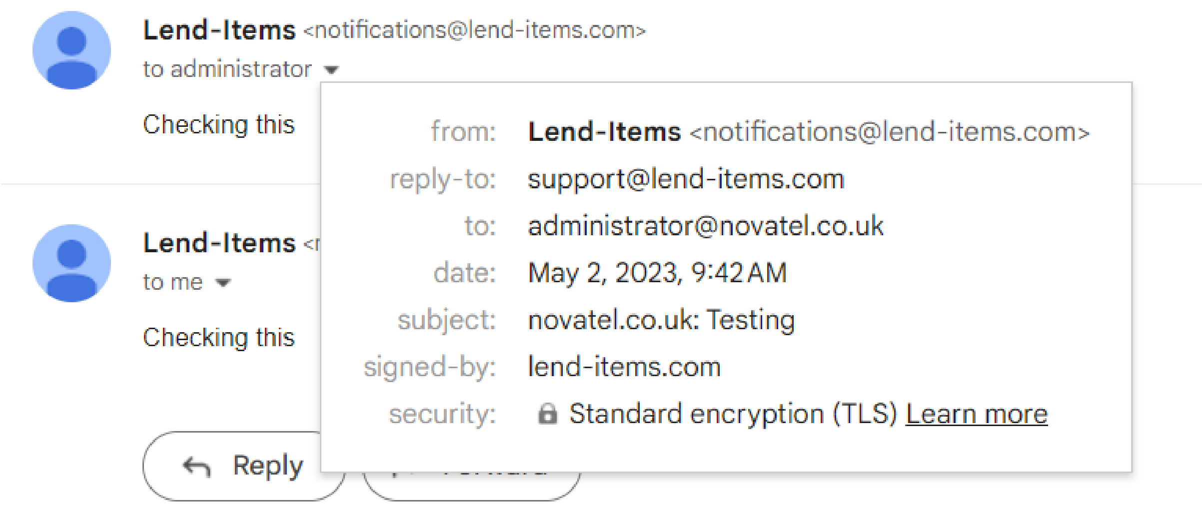
To contact a Librarian Administrator from your library, click on the Contact Us button, and in the screen that appears, click on the drop down list to choose which administrator to send the message to. Type in a Subject, enter your question into the Message area and click the Send Email button as shown below.



The Librarian Administrator will then receive an email with the subject line being the one entered by the user and the contents of the email being what the User typed into the message area.

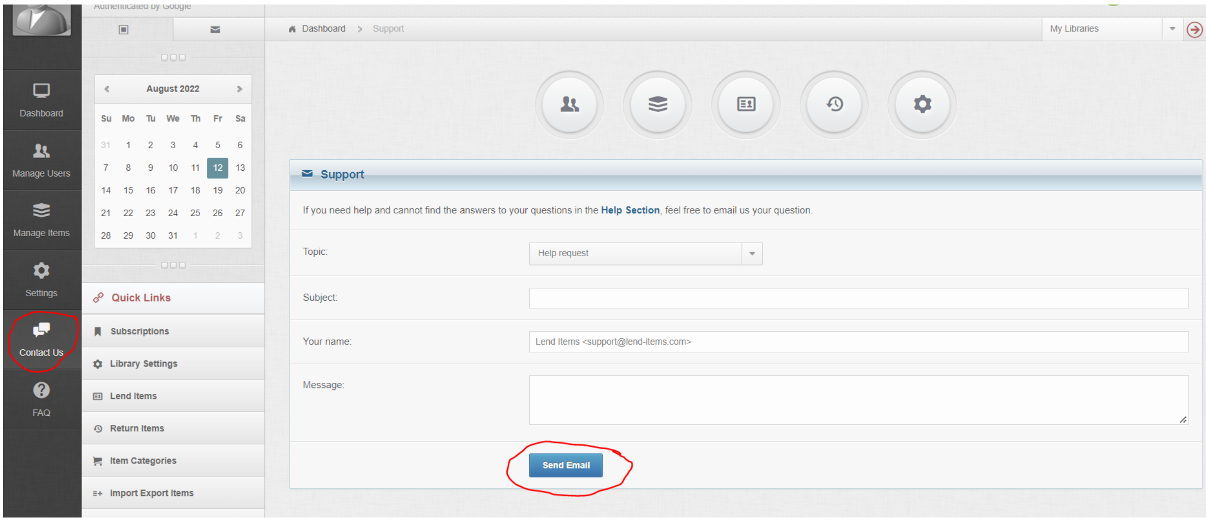
The email will come from notifications@lend-items.com, but the reply-to: field will be populated by the email address of the user that sent the message. So simply replying to the email will direct the return email back to the User who filled out the Contact us form.

The image below shows an example of the from: and reply-to: fields for when the User filling in the Contact Us form was support@lend-items.com



Admin Panel Contact Us

If you are in the Admin Panel and click on the Contact Us button, then it provides you with a screen to enter in a question or comment to send to the Lend-Items support team.



Simply select the Topic, type in the subject of what your request is about, and then fill out the message field with the details of your request and press send email.

There can be situations where an administrator of a library uses the Contact Us button to ask a question to their library but as described above, the email is sent to Lend-Item support.

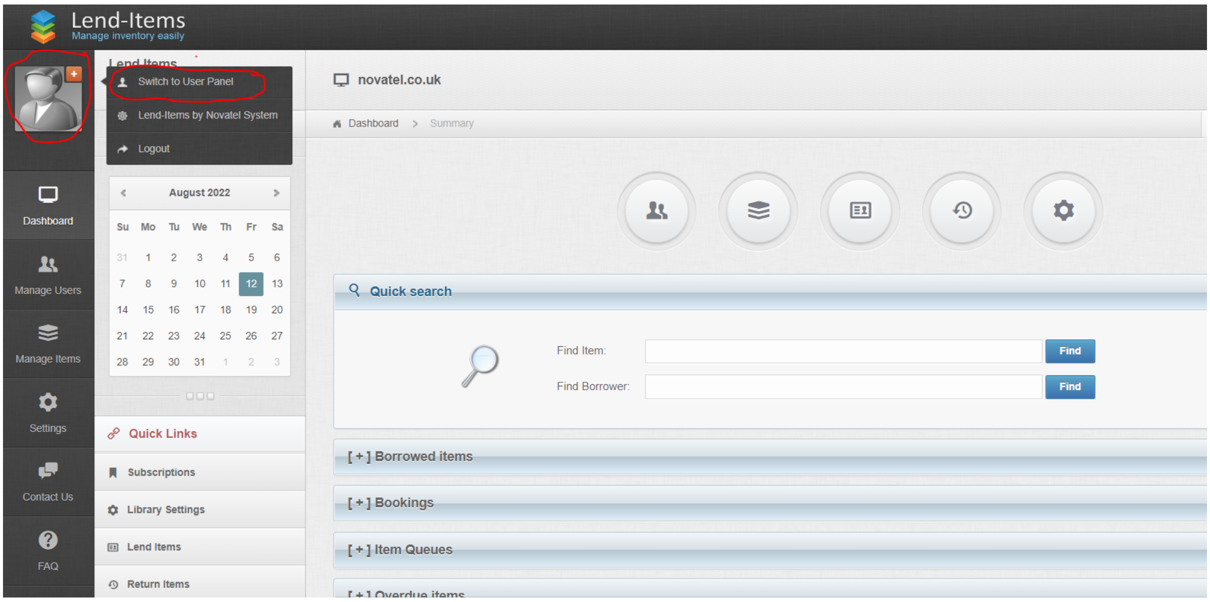
When this happens, LendItems support will usually reply to their email with the following;

“Your email enquiry was sent to Lenditems support rather than to an administrator of your Library.

To send an email to your library administration, first make sure you are on the User Panel and not the Admin Panel. You can switch between these by clicking on the carton picture of a person in the top left corner and selecting the appropriate panel. Once on the User Panel, then under the list of Quick Links click on Support. There you can select the Library administrator to send the email to, fill in the subject and contents of the email and then click on the Send Email button.”

Switching to User Panel

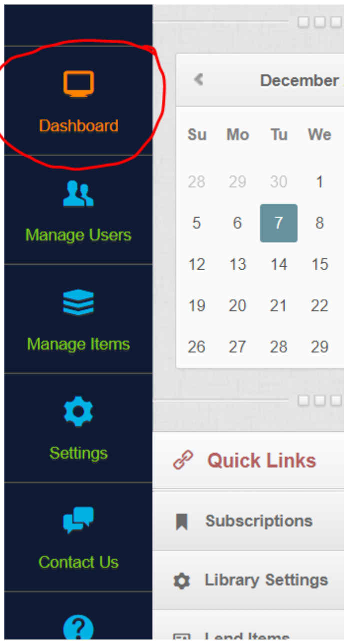
Users who are administrators of a library can switch from the Administrator Interface to the User Interface by clicking on the top left Icon as shown below which will bring up a short menu where you should then click on “Switch to User Panel”.



To switch back to the Administration panel, do the same as above but this time click on “Switch to Admin Panel”.

Dashboard

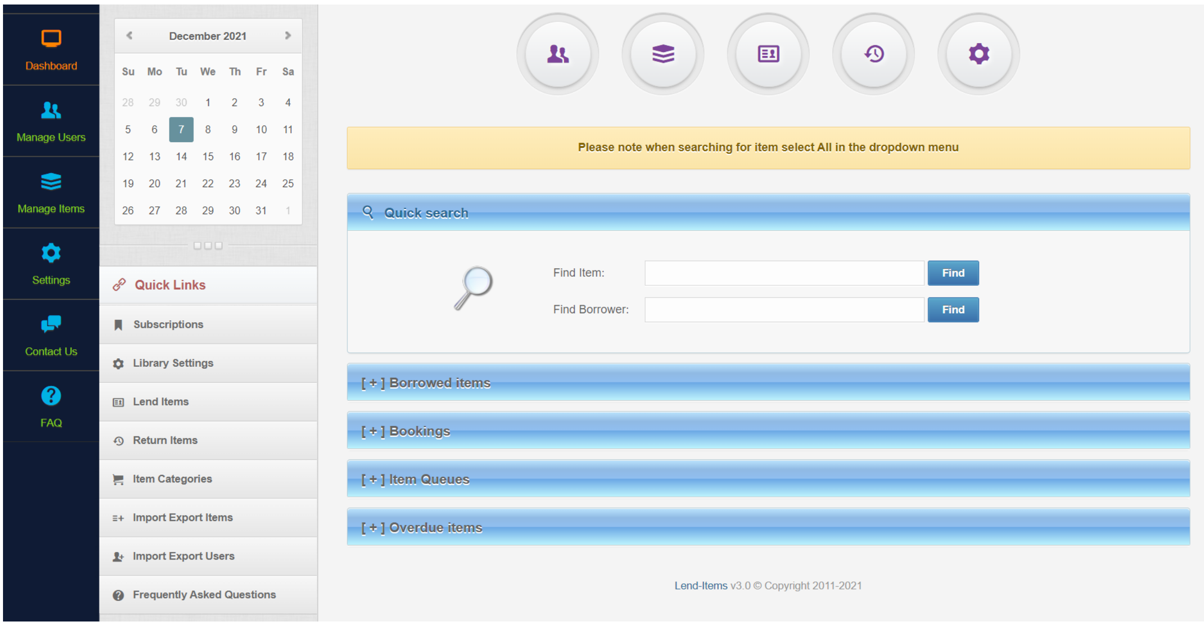
The Dashboard is available by clicking on the top left hand Dashboard menu option;



The Lend-Items Dashboard provides administrators with easy access to the the following;

- There are 5 visual buttons which give access to often used functions as follow;
    - Manage Users
    - Manage Items
    - Lend Items

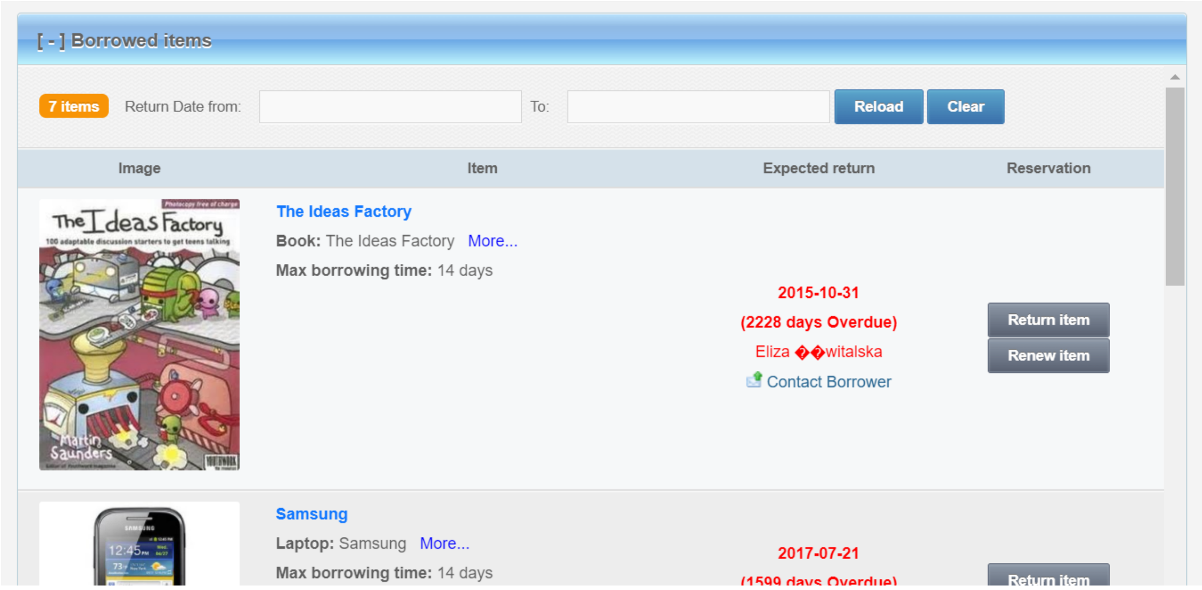
    - Return Items
    - Settings
- Quick Search
    - Find Item
    - Find Borrower
- Borrowed Items Overview
- Bookings Overview
- Item Queues Overview
- Overdue Items Overview



Further details about some of these areas is explained below.

Borrowed Items

Clicking on the [+] sign next to Borrowed items reveals a list of the currently borrowed items.



This list can be filtered by limiting the borrowed items shown to just those, where the expected Return Date falls within a certain range.

Bookings

Users

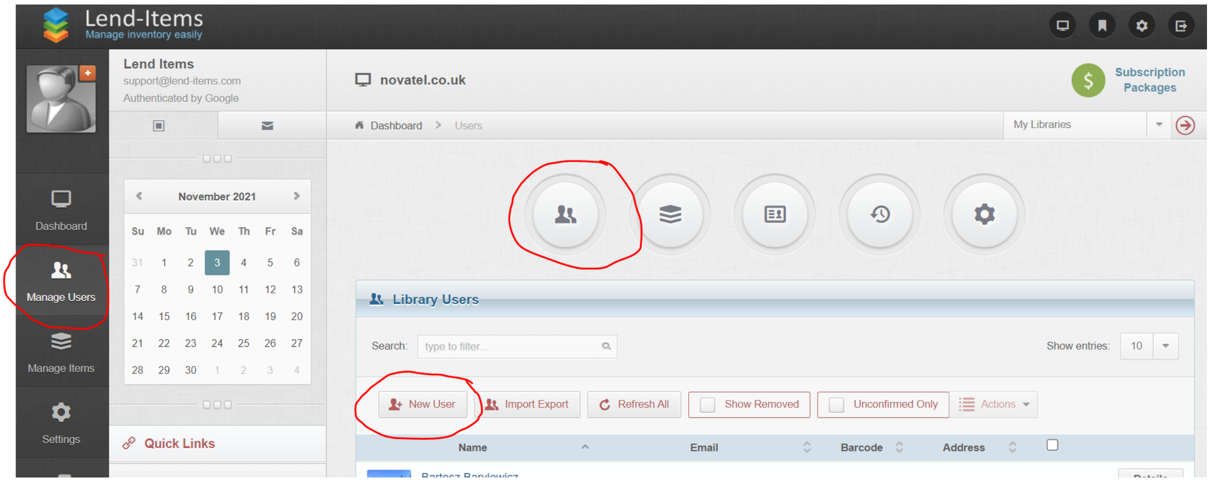
Users can be managed through the Manage Users screen. This allows an Administrator to do the following functions;

- Add a User
- Make a User an Administrator
- Blocking a User from lending
- Editing a User
- Deleting a User
- Deleting Multiple Users
- Showing Removed Users
- Undeleting a removed User
- Resending Invitation Emails
- Resetting a password or Authentication method
- Refreshing and Resynchronizing Users

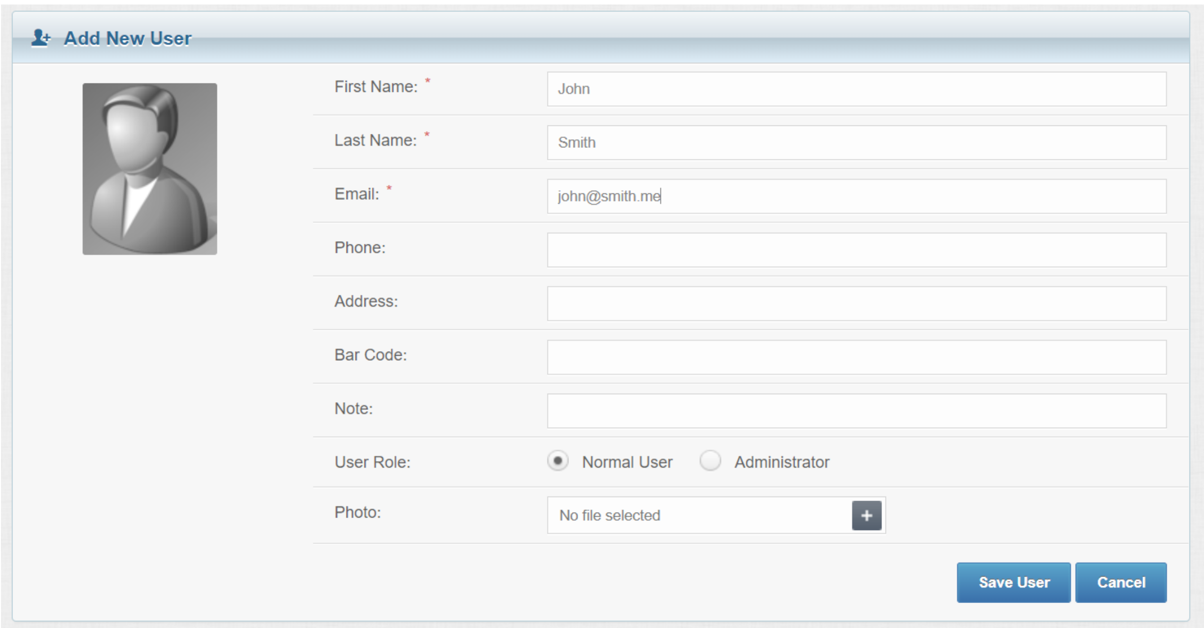
These are described in more detail below.

Adding a User

To add a User to a normal Lend-Items Library, click on the Manage Users button on the left hand menu or the round people icon in the middle of the screen and then click on New User.



Enter in the details for the new user, particularly the first and last name and email address of the user.



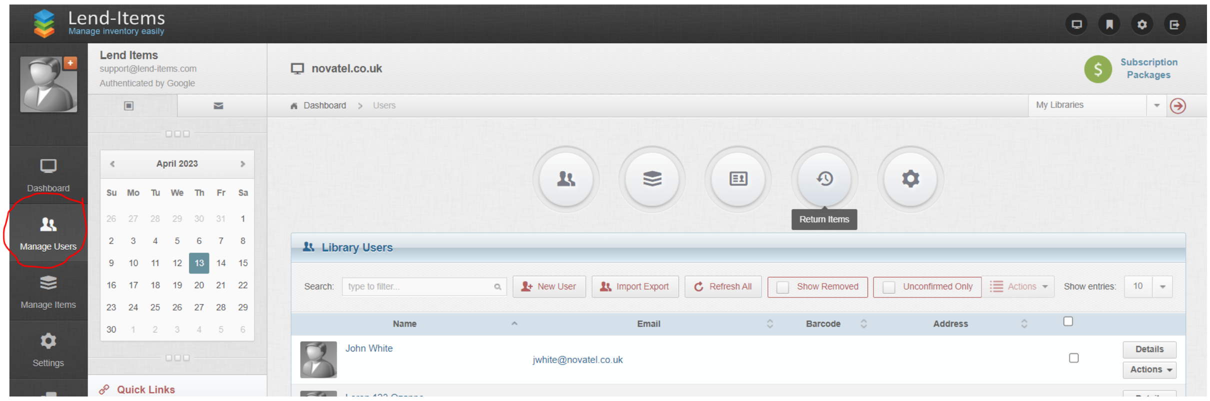
You can also optionally add a phone number, address, barcode for this user's ID card, any notes you wish, and whether this will be a Normal User or an Administrator. You can also upload a picture of the person you are adding.

When you have finished, click on the Save User button to save this user.

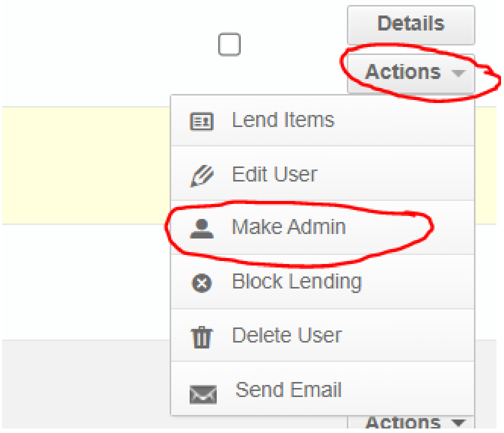
At the time of saving, an invitation email will be sent to the email address which you entered for this user. The invitation email will contain a link, which the user should click on to complete the authentication process for registering for your library.

Making a User and Administrator

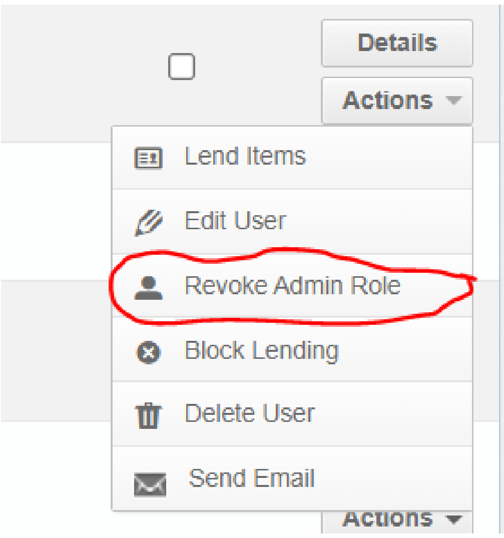
To make a User and Administrator, go to the Users screen by clicking on the Manager Users button as shown below.



Then on the select User, click on the Actions button and select Make Admin as shown here.

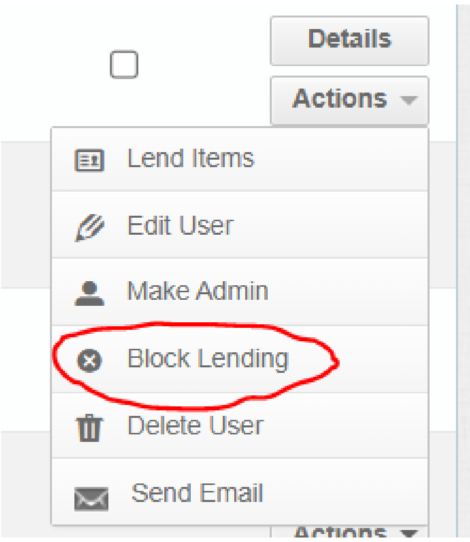


To stop a User from being an administrator, click on the Actions button for the User but this time click on Revoke Admin Role as shown below.



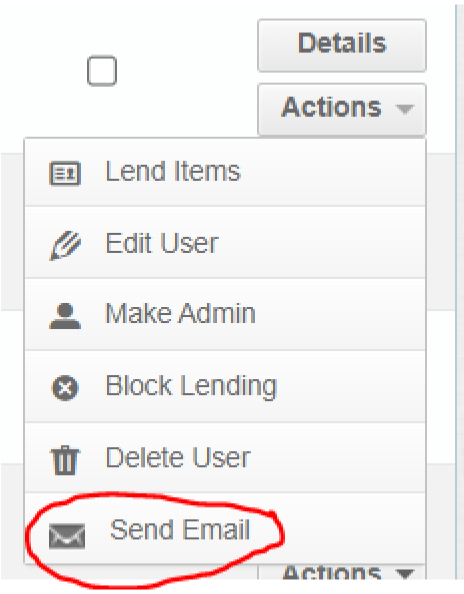
Blocking a User from Lending

A user can be blocked from lending Items by going to the Actions button for this User and selecting Block Lending as shown here.

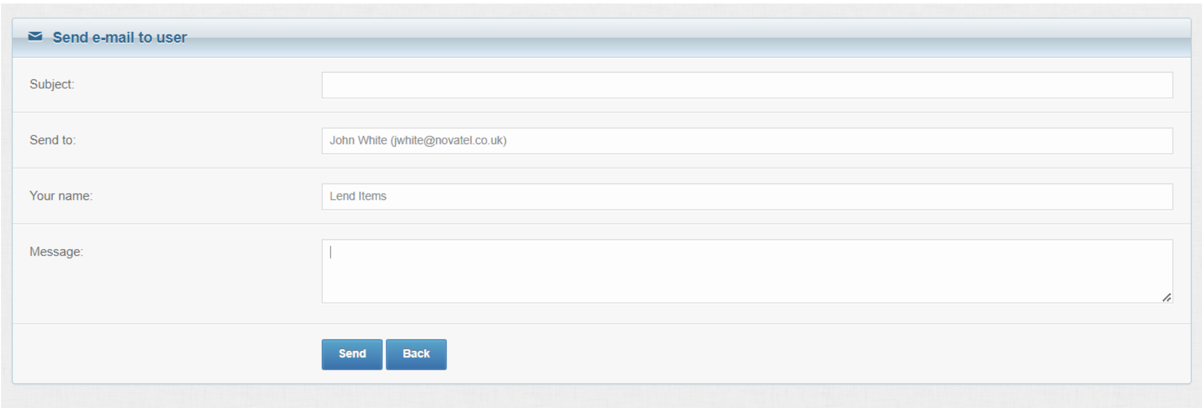


Sending an Email to a User

An individual email can be set to a User by clicking on the Actions button for this User and selecting Send Email as shown here.

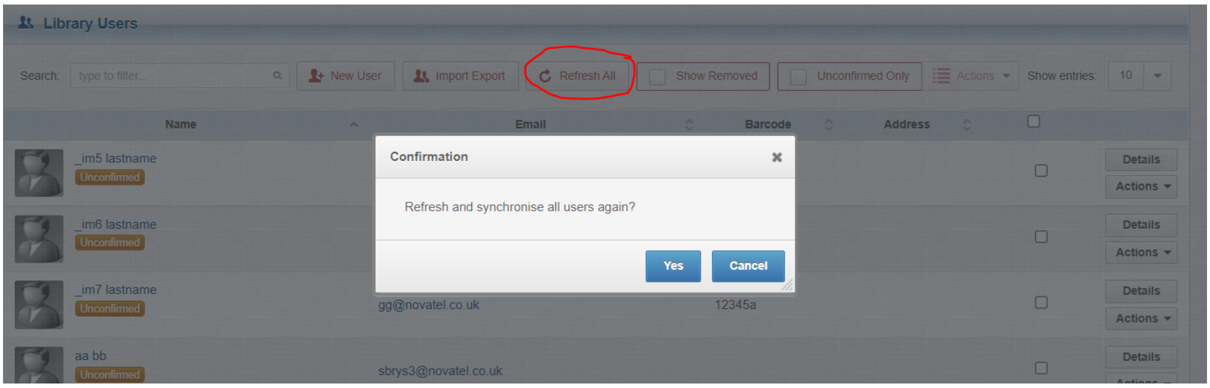


This will bring up the Send Email to User screen where the subject and the message of the email can be entered and then the email sent by clicking on the Send button as shown below.



Refreshing and resynchronizing Users

To facilitate speed of downloading the list of users from the Lenditems servers to the client, the data is stored in a compressed version for faster downloading to the client. However, occasionally the data in the compressed version can deviate from the actual data stored for each user. If this is ever suspected, then the user is advised to click the Refresh All button in order to resynchronise the compressed version with the real actual data as shown below.

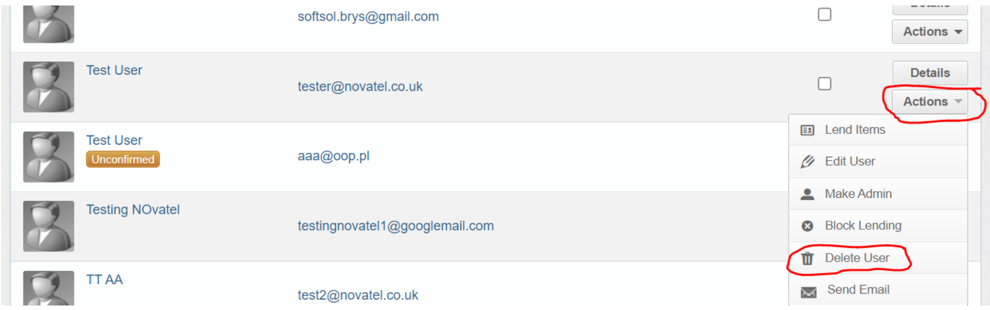


This will bring up a dialogue asking the user to confirm that action. After pressing Yes, the system will refresh and synchronize all users.

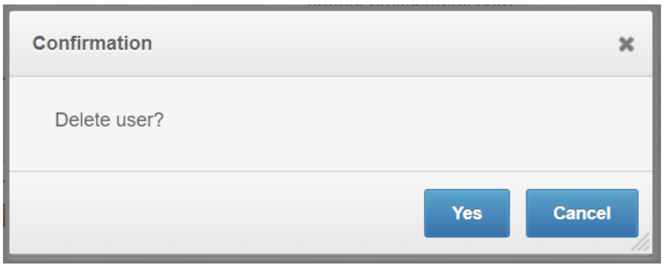
Deleting a User

When users are deleted from a library, they are marked as Removed.

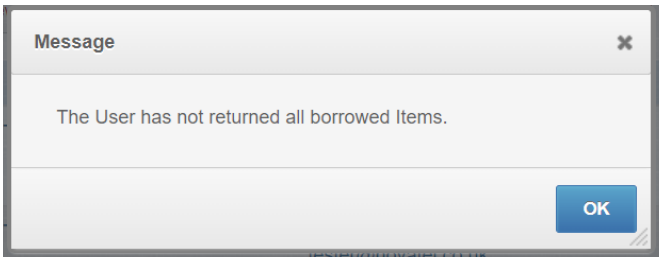
To delete a User, click the Action button for this User and select Delete User.



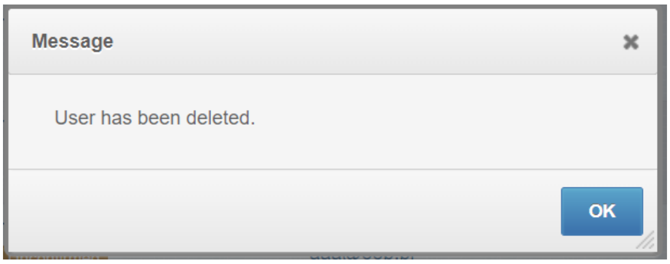
After clicking on Delete User, the application will request for confirmation as follows;



A User cannot be deleted, if they currently have items out on loan. If the User has an item out on loan, they will not be able to be deleted and the following message will be displayed.



If the User has been successfully deleted, then the following message will be displayed.

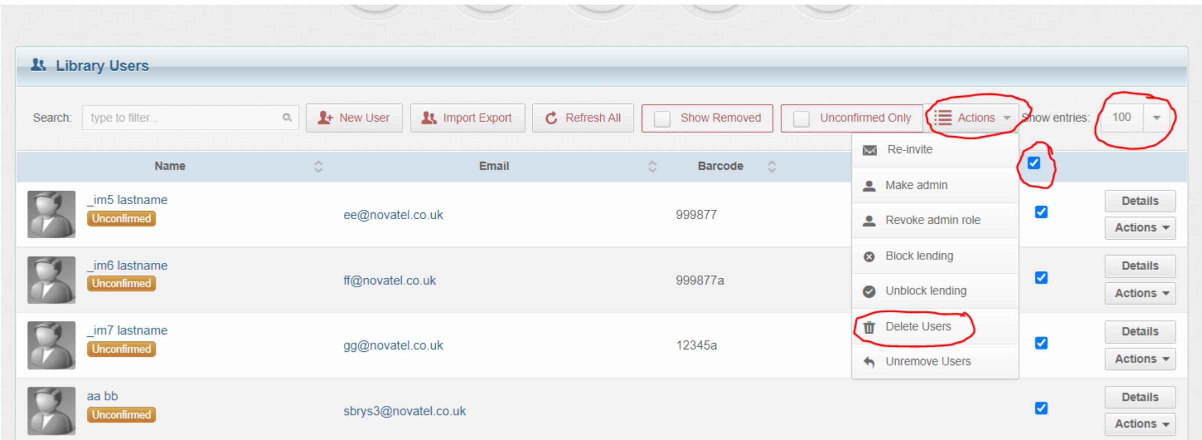


The User will be marked as removed. It is still possible to see these Users and restore them as described in the next section.

Deleting Multiple Users

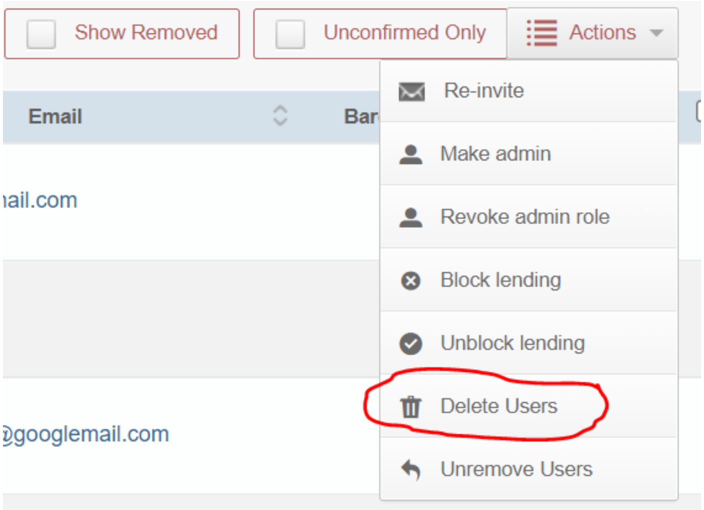
When users are deleted from a library, they are marked as Removed.

You can delete multiple users by working on a screen full of users at a time. (You can select how many users to show on a screen by clicking on the Show entries drop down list as shown below).

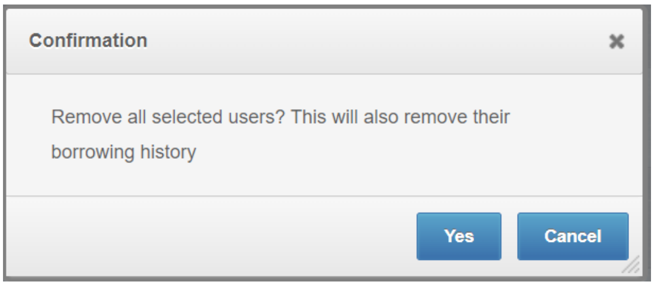


Select multiple users on a screen by clicking on the check box for each user, or selecting all users on a screen by clicking on the check box in the header line as shown above.

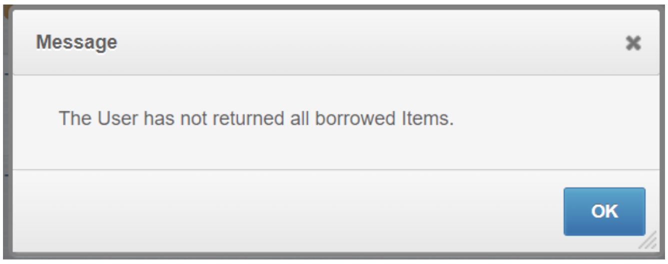
After choosing which users to delete, click on the Actions button and then select Delete Users as shown below.



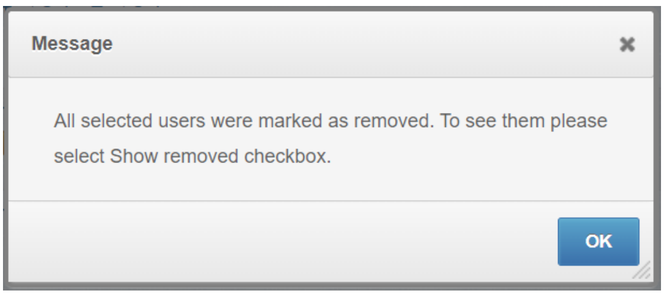
The application will prompt the user to confirm this action with the following message.



A check will be made to ensure that none of the users to be deleted have currently borrowed items and if they do the following message will be displayed.

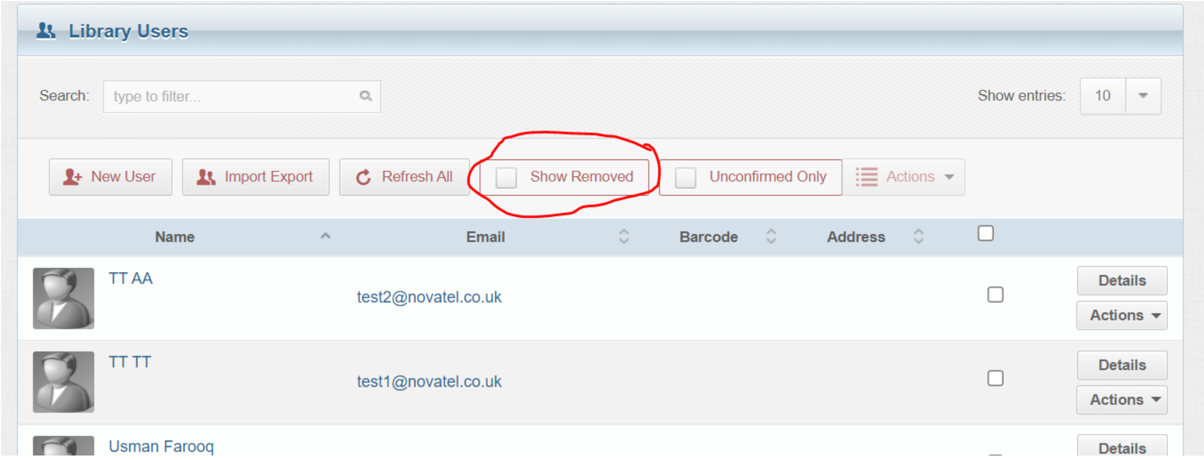


If the users are successfully deleted then the application will display the following message.



Showing removed Users

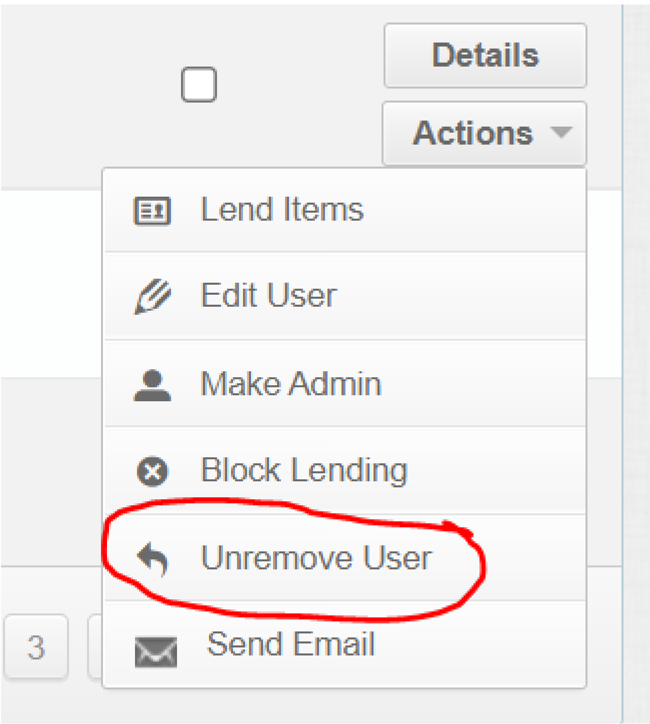
To include removed users in the Manage Users screen, click on the Show Removed checkbox.



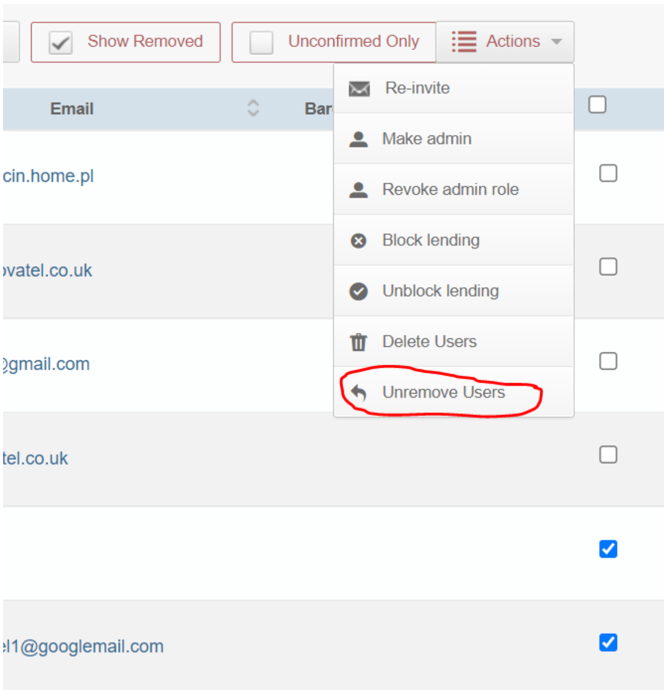
Once the Show Removed checkbox has been clicked, removed users will be shown along with the rest of the users as shown below.

Undeleting removed Users

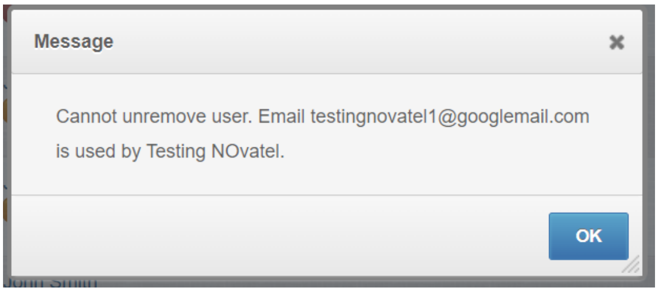
To restore a removed user, select the removed user and click on Actions and then Unremove User.



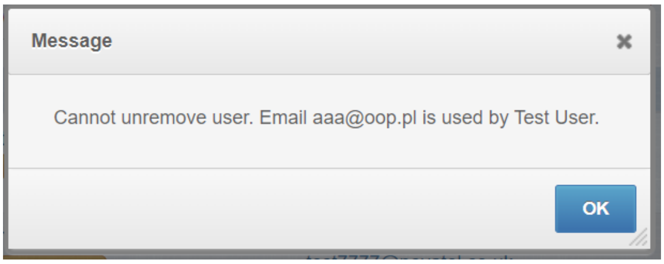
To undelete multiple removed users at once, select the required users to restore by checking the check box next to each removed user, then click on the top level Actions button and select the Unremove option as shown below.



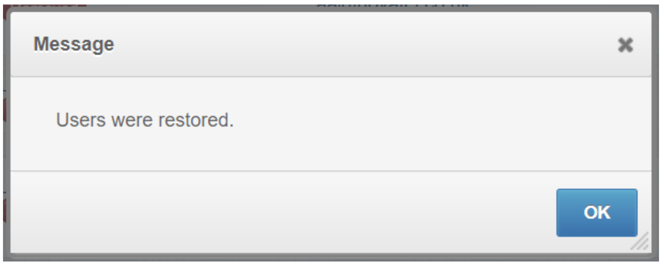
If any of the users selected were not in the Removed status, then the restore will not take place but a message will be displayed like the following.



If restoring a user, would overwrite the email address of an existing user, then this action will not be allowed and a warning message will be displayed like the following;



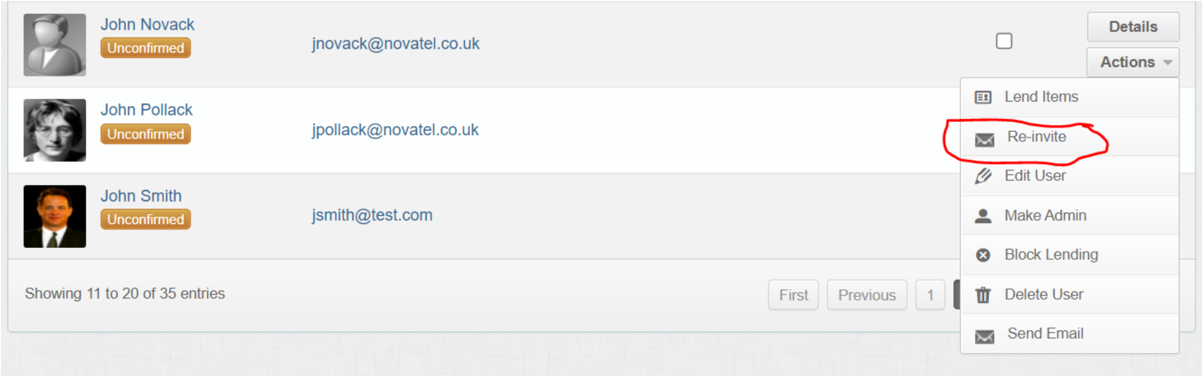
If the action of restoring removed users has been successful then the following message will be displayed.



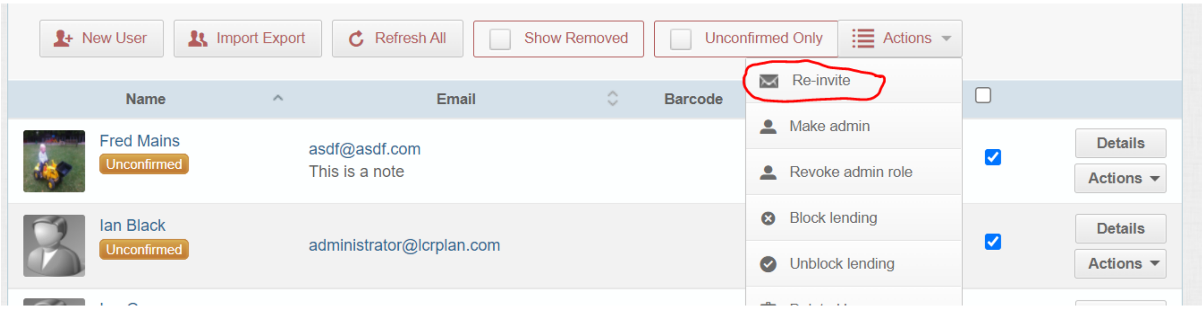
Resend Invitation Emails

When a User is created in a normal library, the application will automatically send the new User an email with a verification link. However, sometimes the User will not receive the email, perhaps it has gone in their Junk folder, or inadvertently deleted the email. So the status of this User will remain in the Unconfirmed status as shown below.

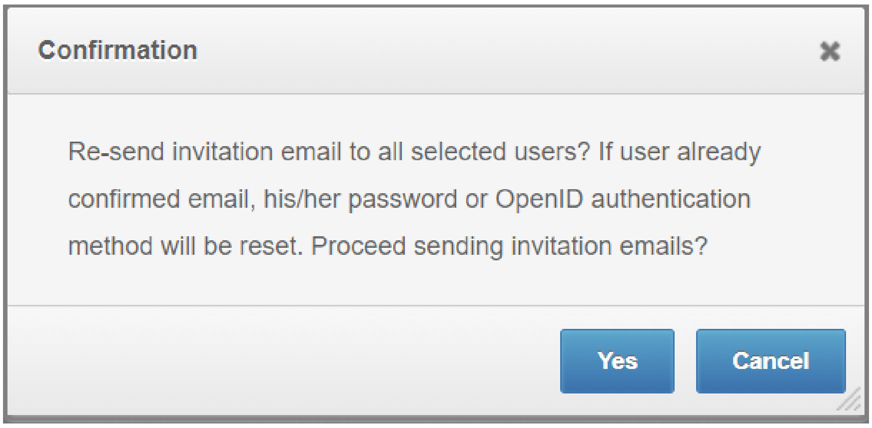
If a User is in the Unconfirmed status, there is the possibility to resend an invitation email to this User. Simply navigate to the User, click on the Actions button for that User, and select Re-invite for that user as shown below. The invitation email will be resent to the User.



To resend an invitation email to a group of users, simply navigate to the users in the Manage Users screen, select each user with the checkbox, press the top "Actions" button (not the one next to the user, but the one above the table), and choose "Re-invite".

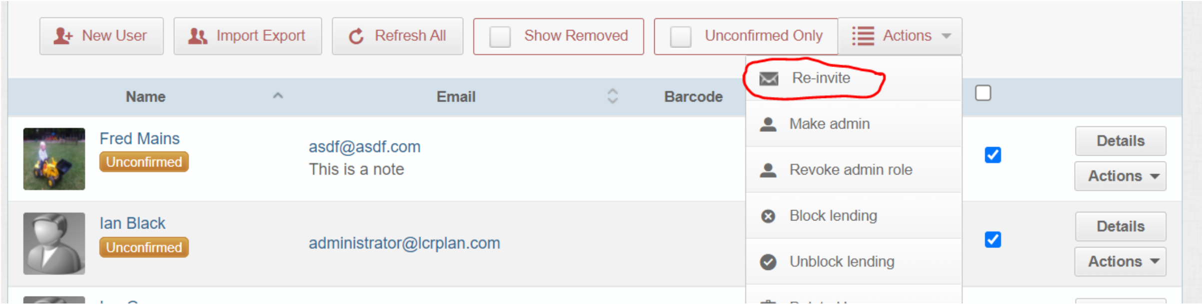


A confirmation dialog will be displayed. Clicking Yes, will send the invitation email again to each of the Users selected. Note that if a User has already been confirmed, this will allow the User to reset their Lend-Items password or authentication method. (See below).

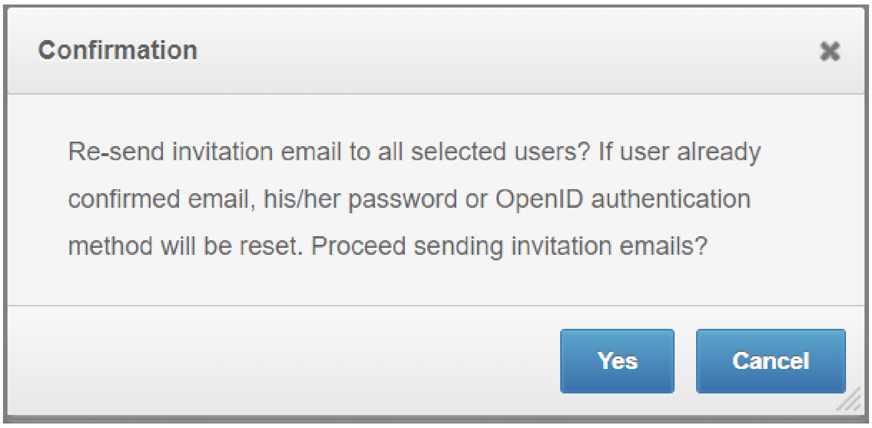


Reset a password or authentication method

The password or authentication method of a user or set of users can be changed. To reset a password for a user, or reset the authentication method they chose, find them on the Users page, select each user with the checkbox, press the top "Actions" button (not the one next to the user, but the one above the table), and choose "Re-invite".



A dialog will be displayed, informing what will happen. Clicking Yes, will reset either the Lend-Items password or the authentication method used for this user or set of users and an invitation email will be resent to that selected user:



Note. It is not possible to reset the password of the Owner in this way. To do this, request Lend-Items support to change the ownership to another administrator, then reset the password of the User and then afterward change the ownership back to the original User.

Change of GMail Address

Every Gmail (Google account) has a unique ID associated with it. This unique ID looks something like 111049544369034193332 and is stored as gmail_111049544369034193349.

When a user is given a new Gmail address then often Google will assign a new Google identity. So when they try to login with the new gmail address Lend-items will not recognise the user. The way to overcome this is to reset the password/authentication method for this user as described above.

Items

A library consists of Items which can be lent out to users that belong to the library.

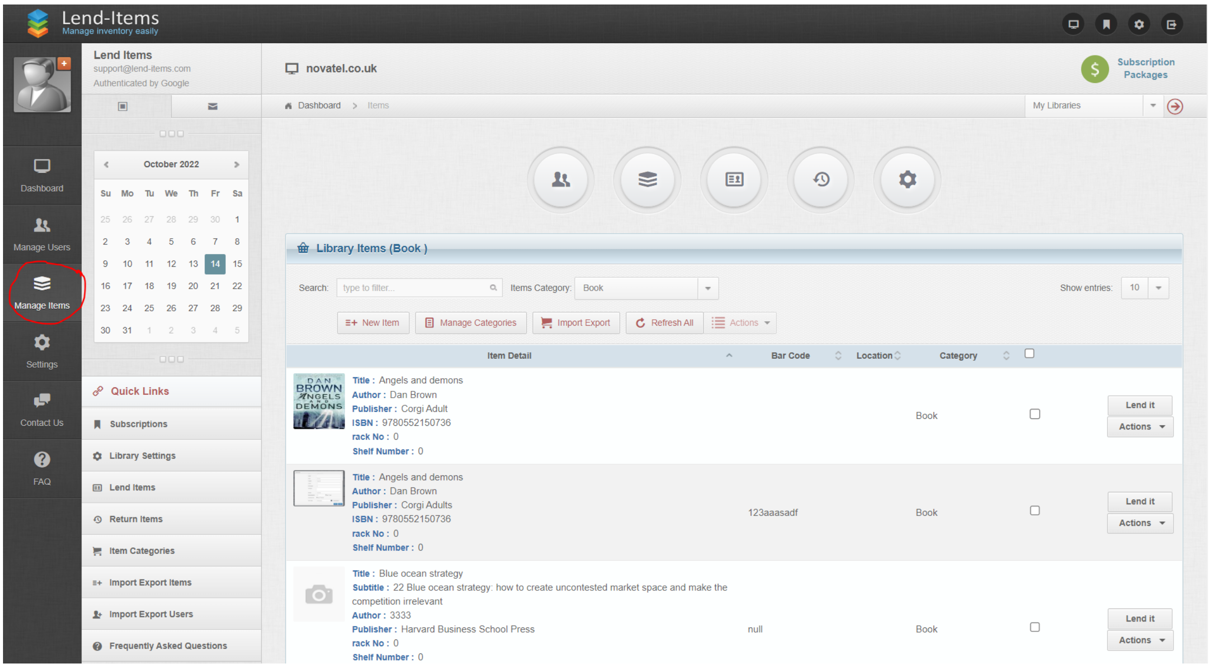
Items can be anything you might conceive of and not just books. For example, they might be laptops, chairs, false teeth, hammers, wigs, cameras, bikes, musical instruments and so on.

As you might imagine, the information you would want to store about all your bikes, would be very different to the information that you might want to keep about all your cameras. For a bike you might want to store your information in a set of fields such as; Bike Size, Color of Bike, Type of Bike, and so on, where as for a camera, you would probably want a different set of fields such as; Make of camera, Model No, Image size, Lens type and so on.

LendItems allows you to set up Item Categories where an Item Category defines the set of fields of information you wish to keep for a particular category of Items.

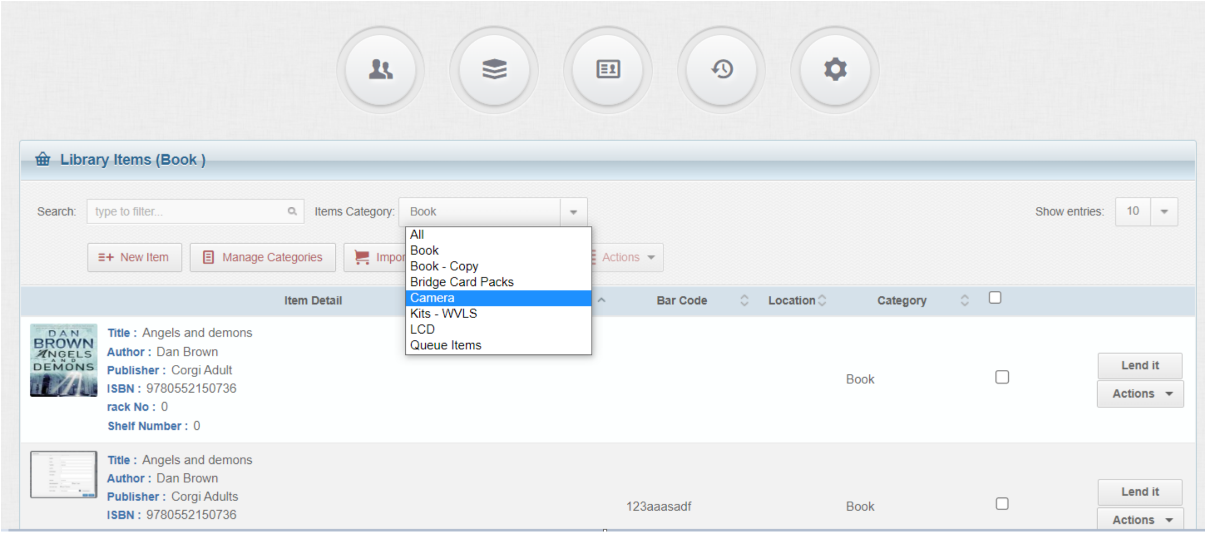
To maintain both your items in the library as well as the Item Categories you go to the Library Items page.

Clicking on the “Manage Items” menu option on the left brings up a list of items in the Library grouped by Item category.



The items shown are generally and normally shown for one particular Item Category.

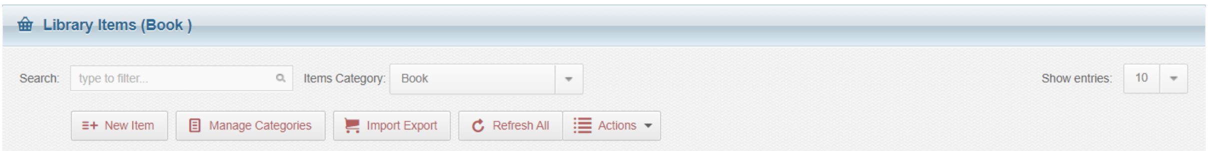
To change to a different Item Category, select this in the Item Category drop down list.



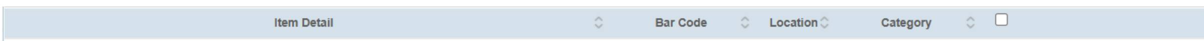
If you wish to see all items in your library, regardless of Item Category, then select All in the Item Category drop down list. Generally the system runs faster though when you select a particular Item Category to work in.

The main menu of the Library Items page provides the following features and functionality;

- Searching for an item
- Selecting a different Item Category
- Controlling how many items to show on each page
- Adding New Items
- Switching to Manage Categories page
- Importing and Exporting Items and borrowing history
- Refreshing and synchronizing your items
- Performing Actions on multiple Items as once



Below the Library Items main menu is a table which shows information about the items in the currently selected Item Category. This table of items has the following header.



The columns have the following purposes;

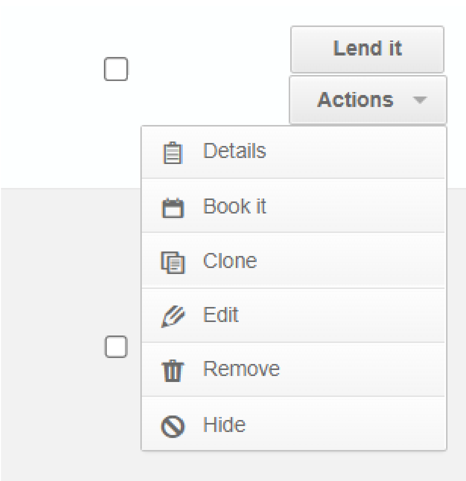
- Item Detail column shows summary details about the items.
- Bar Code shows the bar code of the item if it has one.
- Location shows location of the item if locations have been enabled for this library.
- Category shows the Item category for this Item
- Check box if clicked will select all items on the current page

In the list of Items displayed in the table the following is visible;

- Display summary information about each item.
- Show borrowing status for each item.
- Show the Barcode, Location and Item Category for each item.

For each item in the table the following functions are possible;
- Lend the item out or return it if it is currently borrowed.
- Perform actions on the item such as;
- Find more details about the item.
- Reserve the time by booking it or queuing for it.
- Make a clone of the item.
- Edit the Items.
- Remove the item from the library.
- Hide the item in the library.

To perform one of the actions described above, simply click on the Actions button next to the Item and it will reveal a list of possible actions for this item as shown below.



Details of all the functionality mentioned above are described in the following sections.

Details

The Details action brings up a screen showing all the details about this item, including the contents of all the fields for this item category, Location is that is enabled, Reservation type, who the items is loaned to and when it is expected to be returned, the list of people queued on or reserving this item, comment remarks about the item, and it's lending history. This is also the opportunity to set a new remark about this item.

Queue

If the reservation type for the item is Queue, then this action will be possible and a user can be entered into the queue for this Item. Clicking on Queue will prompt the user to enter the user to be put into the queue for this Item.

Book it

If the reservation type for the item is Booking, then the action Book It will be possible and you can make a booking for a particular user for this Item. Clicking on Book It will present a dialogue where the user to reserve this item for can be selected. After the User has been selected, then the dates/times of the booking for this item for this user can be set up.

Clone

The Clone action allows the user to clone an item a number of times up to a maximum of 50. When the user clicks on Clone, it will request the user to enter the number of clones of this item to make. It will automatically create barcodes for each of the items.

Edit

The Edit action allows the user to edit the various attributes of this item including the all the fields of the item for this category, the Location if this is enabled, the Maximum Lending period in days or hours, the reservation type, and the item's image.

Remove

The Remove action allows the user to remove an item from the library.

Hide

The Hide action allows the user to hide an item from the library. If the Item is already hidden then the action Unhide will be shown enabling the user to unhide the item.

Searching for an item

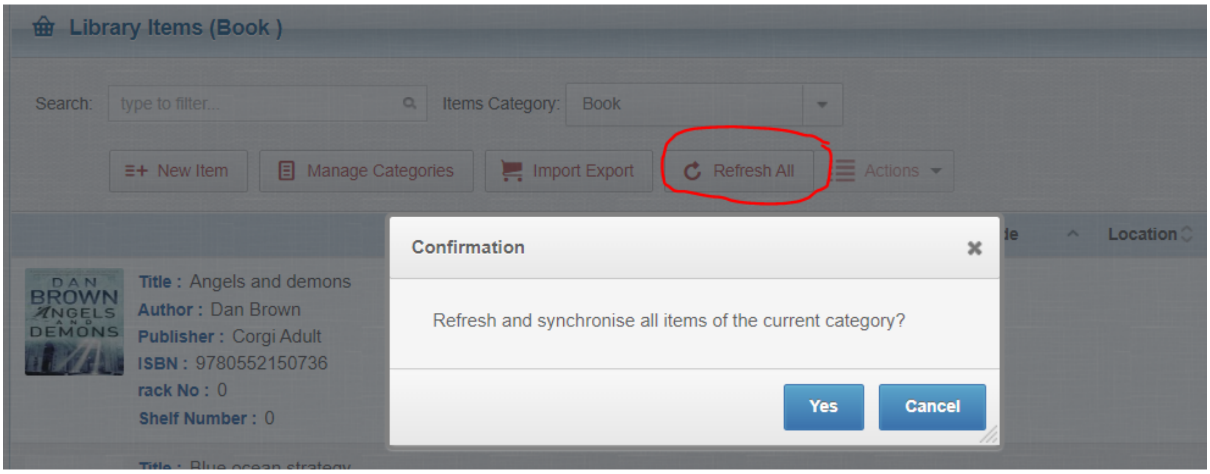
Lenditems feature iterative searching. This means that as you type in the Search field, it will progressively filter the number of items shown to just those that match the search criteria entered. It will only search for items in the currently selected Item Category.

- Adding New Items
- Switching to Manage Categories page
- Importing and Exporting Items and borrowing history
- Refreshing and synchronizing your items
- Performing Actions on multiple Items as once

Adding Items

Refreshing and resynchronizing items

To facilitate speed of downloading the list of items from the Lenditems servers to the client, the data comprising an Item Category is stored in a compressed version for faster downloading to the user. However, occasionally the data in the compressed version can deviate from the actual data stored for each item. If this is ever suspected, then the user is advised to click the Refresh All button in order to resynchronise the compressed version with the real actual data as shown below.



This will bring up a dialogue asking the user to confirm that action. After pressing Yes, the system will refresh and synchronize all items of the currently displayed Item category.

If All is selected for the Item Category, then this function will refresh and synchronize all items in all Item categories, in other words all Items in the library.

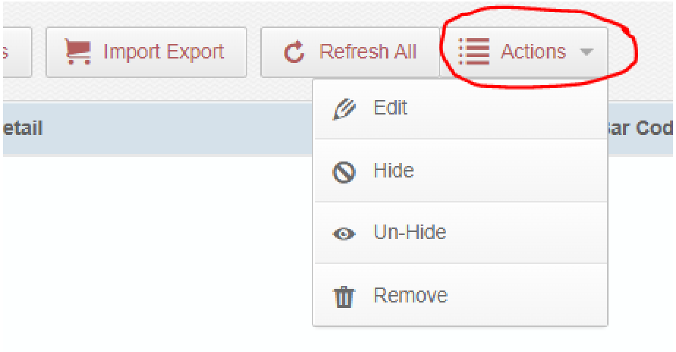
Actions on Multiple Items

Sometimes there are situations where you wish to perform an action or edit on multiple items at once rather than doing it on each item one at a time.

First select the items you would like to perform the bulk action on. Do this using a combination of clicking on the checkbox in the Items table Header, and clicking on the checkbox next to each item to toggle its inclusion or exclusion from the list of items to perform the action on.

When one or more items have been selected, then the Multiple Selection Actions button in the Library Items menu will become active and clicking on it will reveal the following actions;

- Edit
- Hide
- Unhide
- Remove



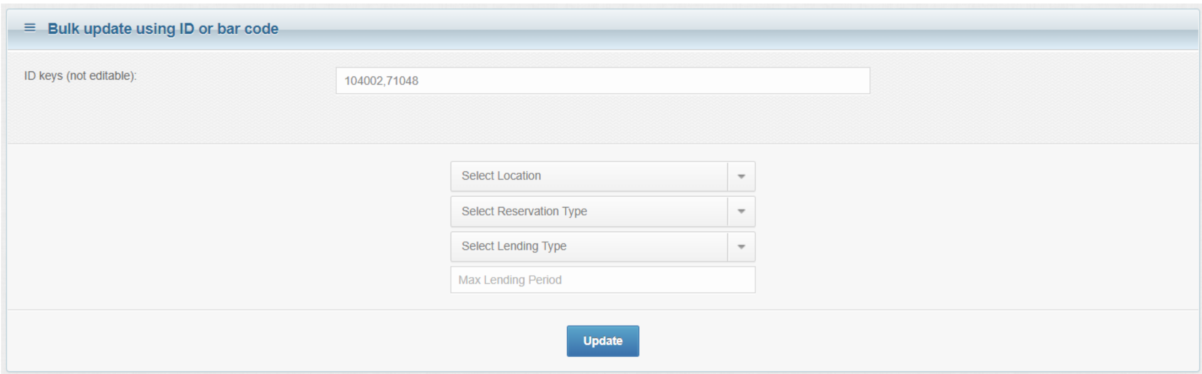
These are all actions that are available at the individual item level but here will be applied to all items in the multiple selection.

Edit

Edit on the Multiple Selection Actions button allows the user to update all the items with respect to one or more of the following;

- Location
- Reservation Type - Queue or Booking
- Lending Type - Days or Hours
- Max Lending Periodlocatio

Clicking on the Edit from the Multiple Selection Actions button brings up the following dialogue.

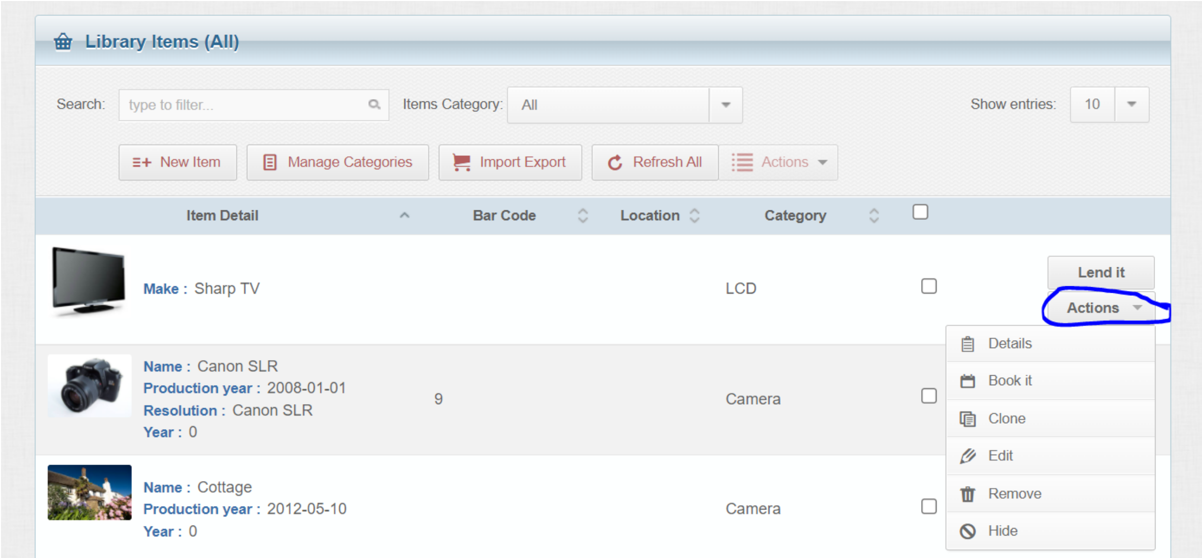


If Locations have been enabled for your library, then the Location for each of the items in your selection can be updated in one go.

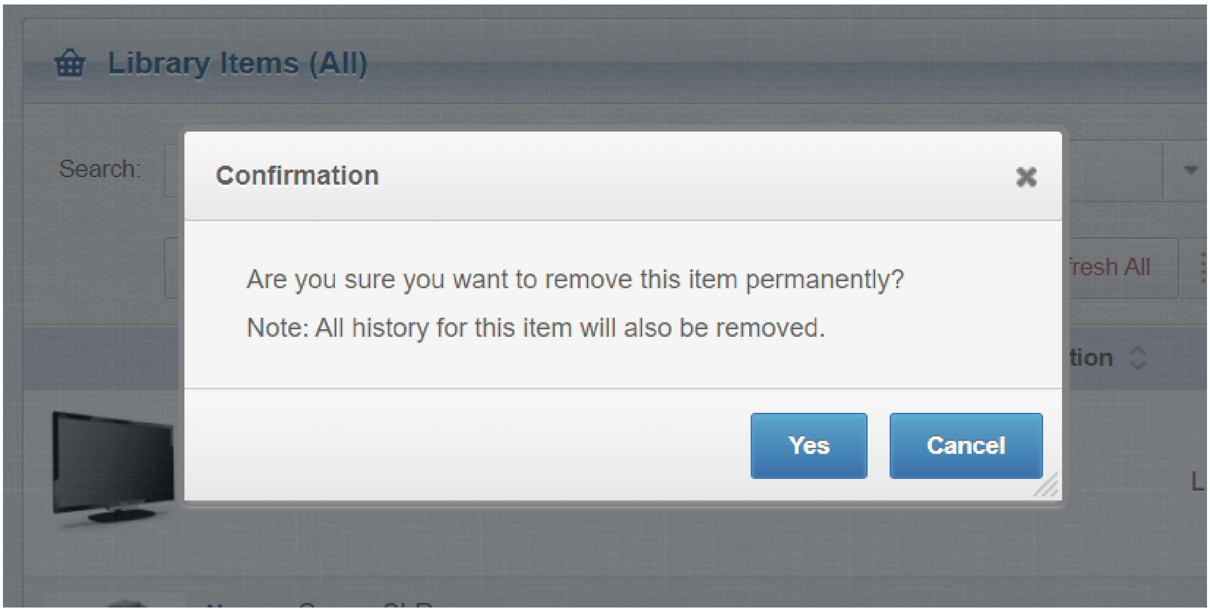
Similarly the Reservation Type for all Items can be updated to either Queue or Booking, the Lending Type can be changed to Days or Hours, and the new default Max Lending Period can be entered and will be applied to all items in the selection.

Deleting Items

To delete an item, select the item, and click on the Actions button. This will present a list of actions to perform. Click on the Remove option to delete the item.

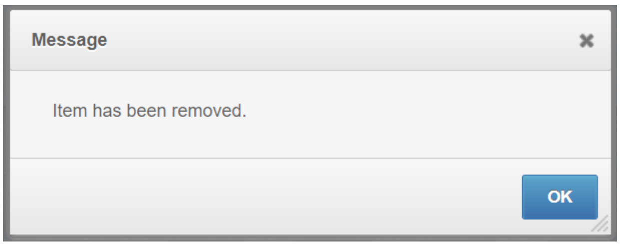


You will then be prompted to confirm your decision to remove this item from the Library.

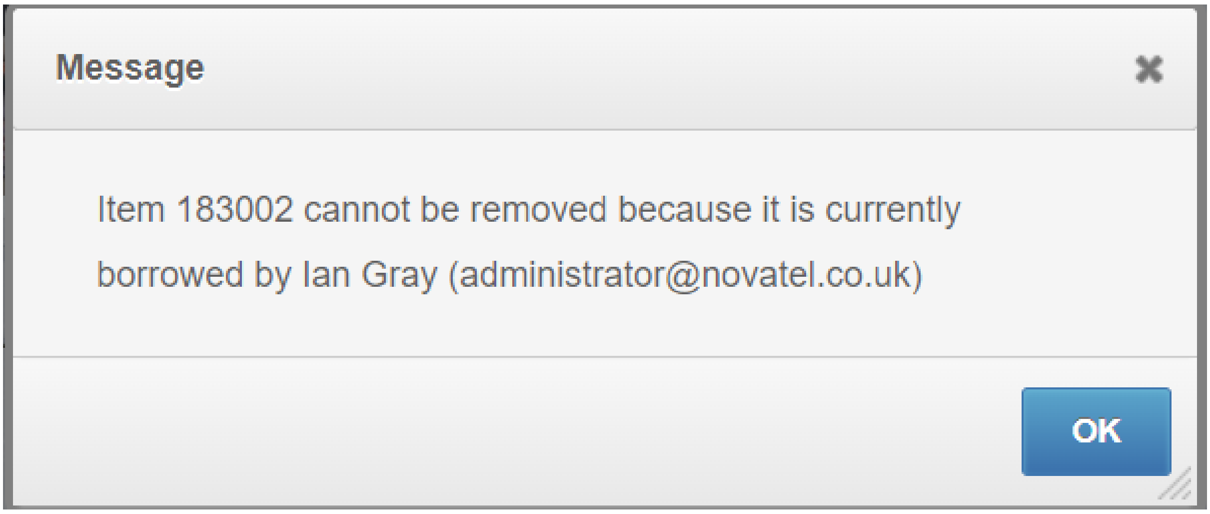


Click Yes to confirm this action of deleting the item.

A confirmation will show when the item is deleted.

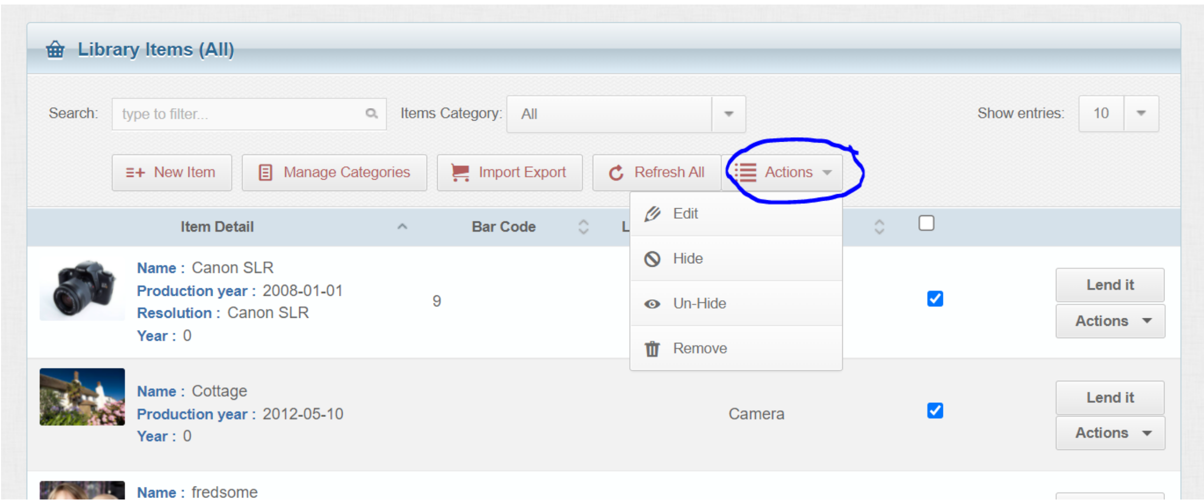


If the item is currently on loan, you will not be able to remove this item. A message like the following will be displayed.

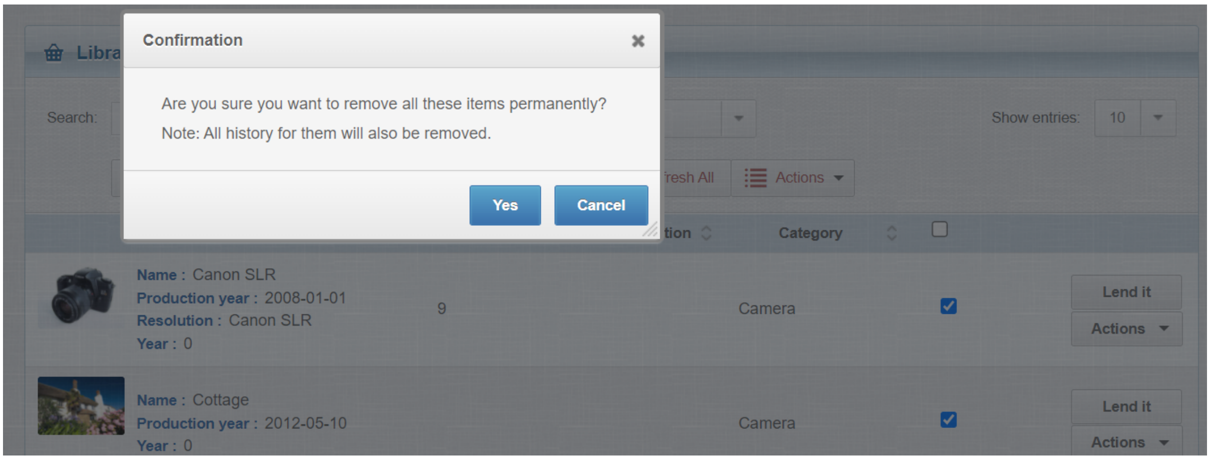


Deleting multiple items

To delete multiple items at once, select the required items to delete, by checking the check box next to each item, then click on the top level Actions button and select the Remove option as shown below.

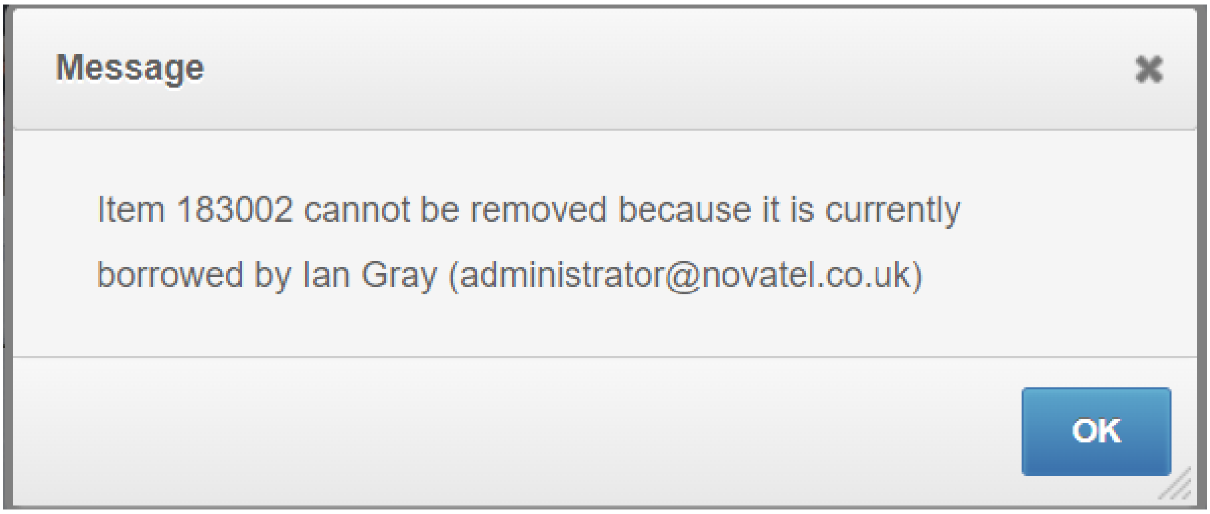


You will then be prompted to confirm your decision to remove all these items from your Library.



Click Yes to confirm this action of deleting these items.

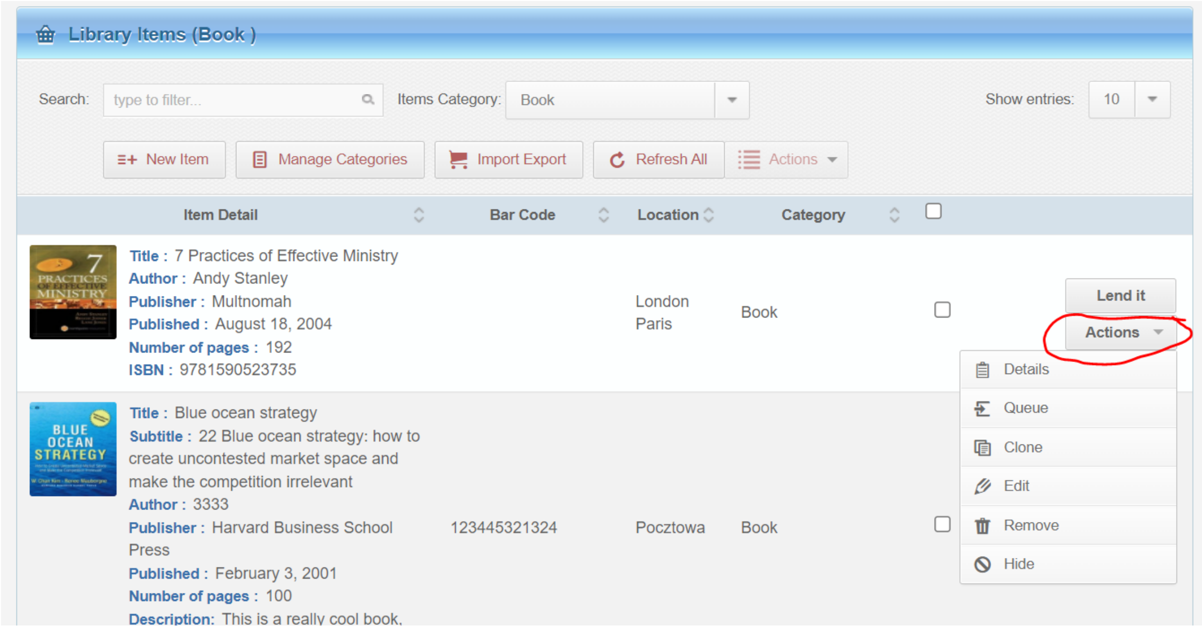
If any of the items are currently on loan, you will not be able to remove this list of items. A message like the following will be displayed.



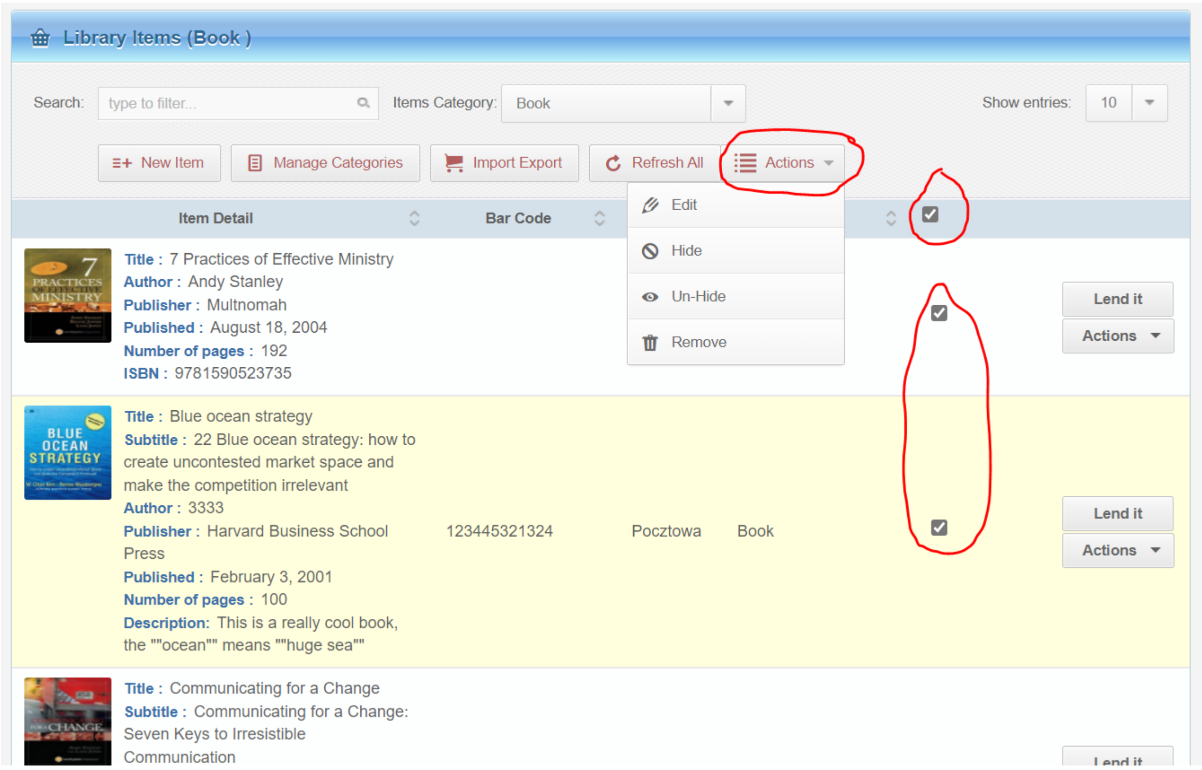
Hiding and unhiding Items

There can be occasions when an administrator of a library wants to hide the visibility of items from normal users. Items can be hidden from users so they cannot view or search for them. However, these items are still visible to an administrator and can be lent out to users.

To hide or unhide an item, find the item in Manage Items, click on the actions menu for that item and select Hide or Unhide to hide or unhide the item.



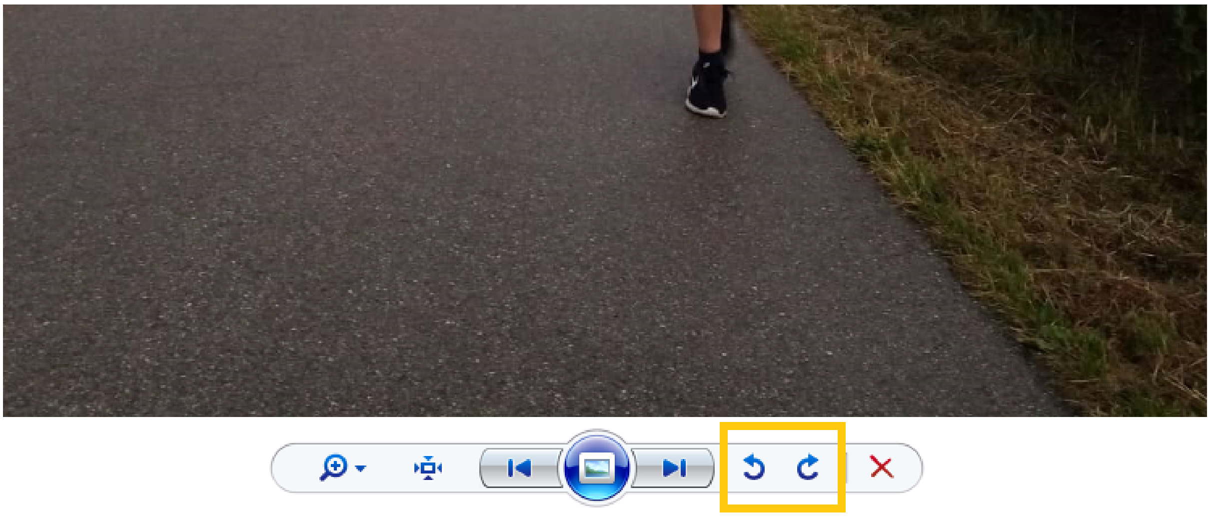
To Hide or Unhide multiple items, select the items by marking the check box for each item, or to select a page full at one time click on the check box in the header of the list of items as shown in the image below. When the items have been selected, click on the Actions menu at the top of the table of items and select Hide or Un-Hide as appropriate.



Searching

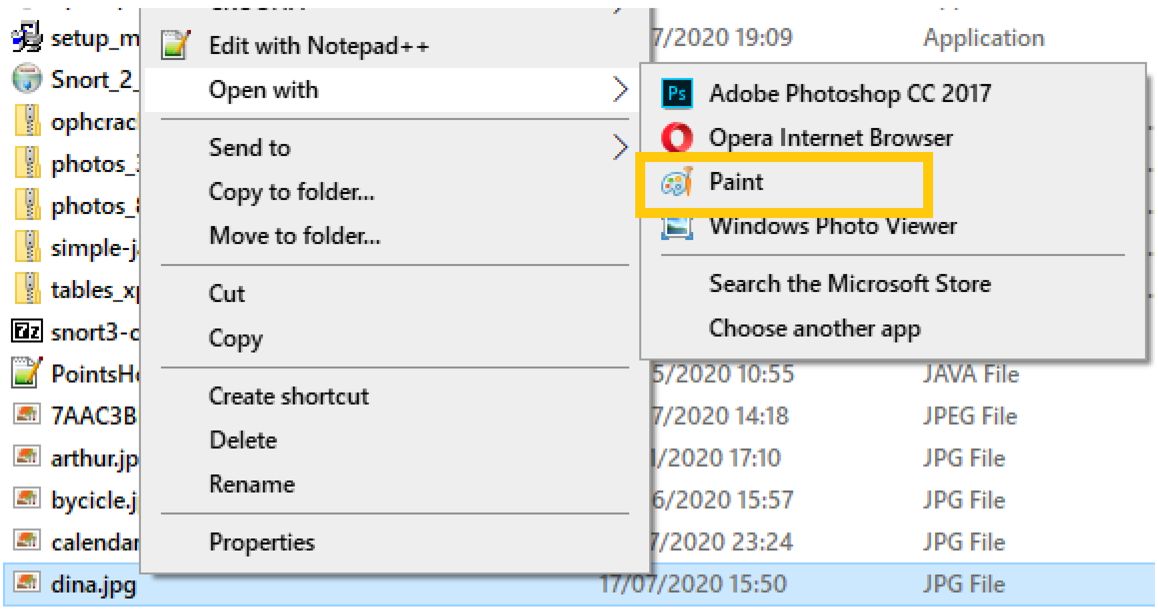
Photos

Our software doesn't rotate pictures. But it also doesn't support autorotation made by Windows or Mac viewers, that is when you rotate with viewer buttons:

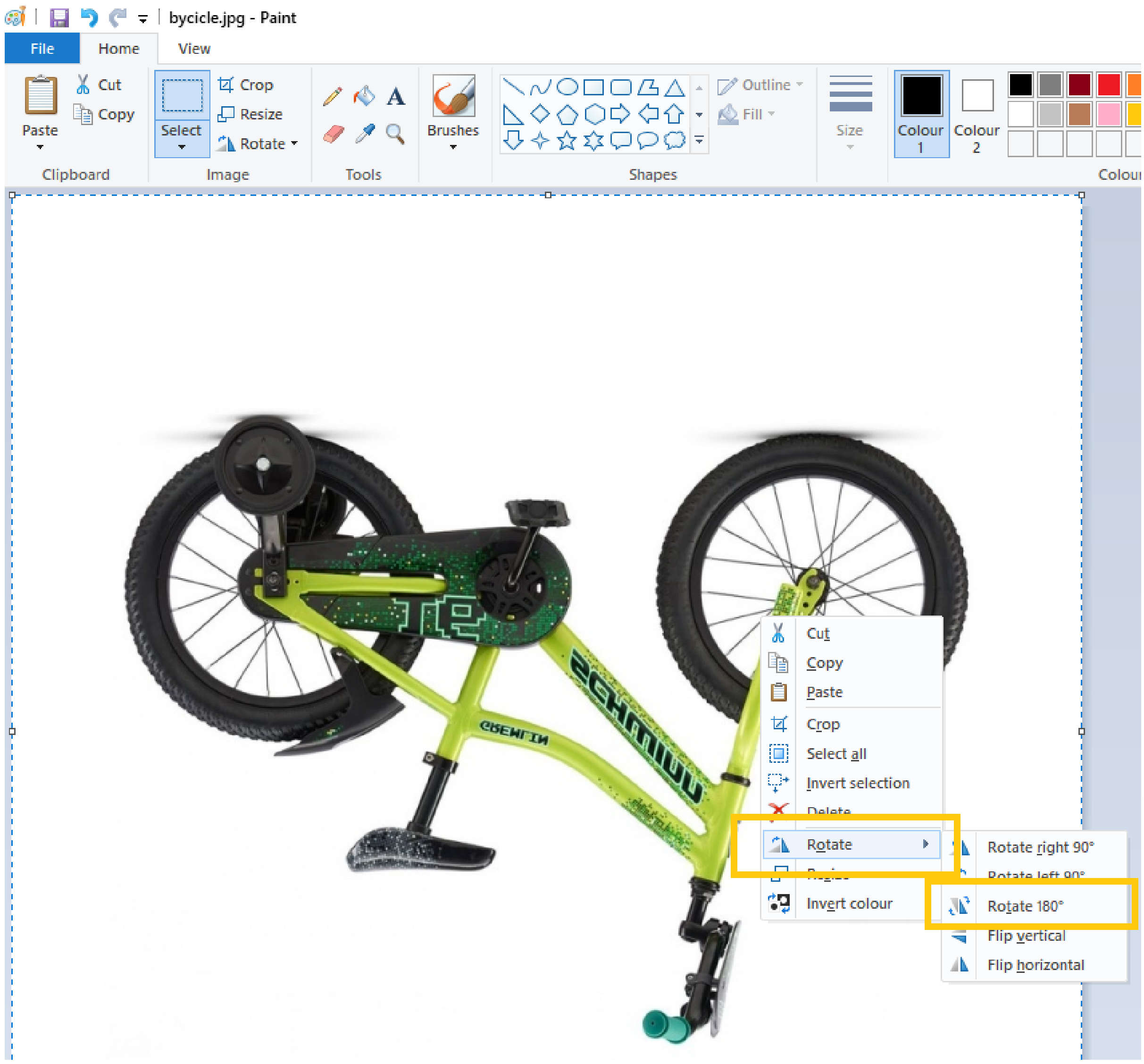


When you do this, only your computer remembers the rotation settings, and if you send the picture to another computer, or upload to lend-items, the image will return to its original rotation.

To rotate image for uploading to Lend-items you need to open it with an editor, for example, Paint in Windows:



So for example, the steps to do this in Windows paint is to open the photo, press Ctrl+A to select the whole picture, press right mouse button and choose Rotate > Rotate 180'



After you have saved the image you can then upload the modified image to Lend-items

Barcodes and Scanning

Barcodes and scanners can be used with Lend-Items. Basically you need two things; a) a means of creating barcodes, b) a scanner to read those barcodes.

Printing Barcode labels

The basic concept is you first print out some pages of sticky barcode labels, each with a unique (and arbitrary) barcode and stick a barcode label to each of your items. You then edit each item in Lend-Items, move to the barcode field, scan in the barcode attached to that item, and press the save button. Now the number on that barcode stuck to your item is linked to this item in your Lend-Items library.

Lend-Items can't create labels, but we recommend Free Barcode Label Design Application (https://www.idautomation.com/free-barcode-products/label-software/). You will find many excellent training videos for using this software at this link.

With this software you can easily print out pages of unique Barcodes, and then affix these to your items and/or books. Then to join the item to the barcode, simply search for the item, edit it, and in the barcode field, scan in the barcode that is now affixed to this item and save the item again.

For printing Custom Labels with your own custom attributes or where you already have assigned a barcode to the item, we have prepared the following video tutorial about how to do this. Please see the link:

http://youtu.be/A6CjeZXyPxU

(Please note that the start of the video shows an older version of Lend-Items).

The basic idea is that you export the books from our application into the CSV file and then use it as a data source in the labelling software. Based on the template it can prepare the labels for all your books and/or items.

Scanners

Our application is really set up to run on a desktop/laptop computer, with a scanner attached.

We would suggest some low cost barcode scanner (like this one http://www.barcodesinc.com/unitech/part-as10-u.htm) that you simply plug into your USB slot in your computer. Then while adding/editing/lending/returning items simply move to the barcode field and press the scan button on the scanner instead of typing in the barcode.

Mobile Scanning

At present we do not have a purpose built lend-items application for IOS or Android. However the lend-items web application has been designed to run on your normal browser on Apple or Android devices.

If you wish to use a barcode scanner with your mobile device, then there a couple of options;

1) Use a barcode scanner app to scan a barcode, copy it and then go back to the browser where lend-items is running and paste the barcode into the required field. This is obviously a bit cumbersome.

2) Install an app such as Barcode Scan to Web which allows the barcode to be scanned directly into a field in the Lend-Items web application.

Exporting and Importing

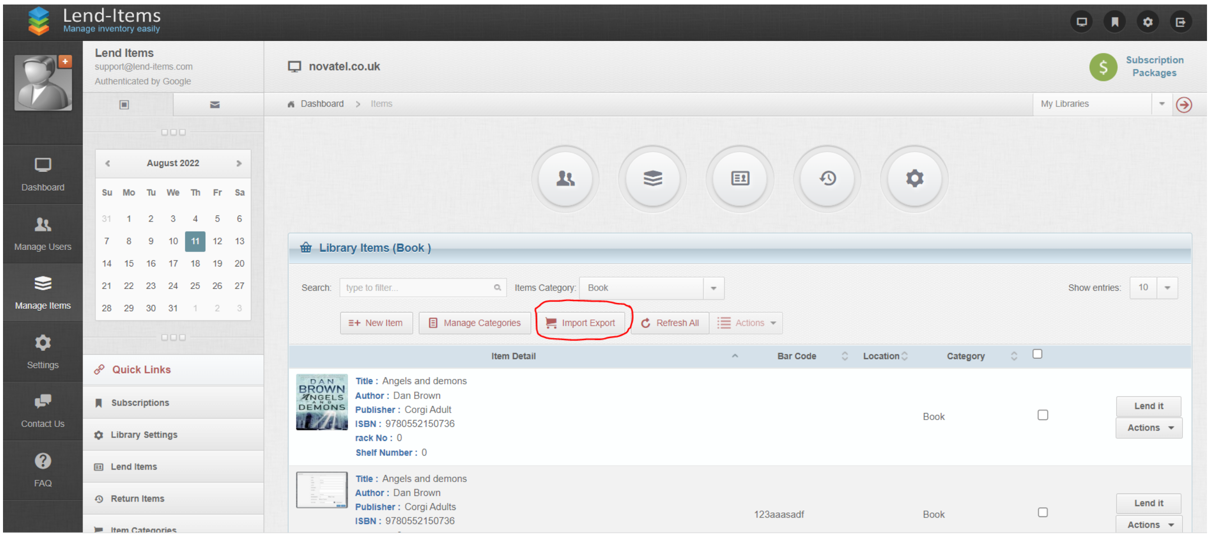
Lend-Items allows you to export Items, Users and lending history information, as well as to import Items and Users.

Exporting Items

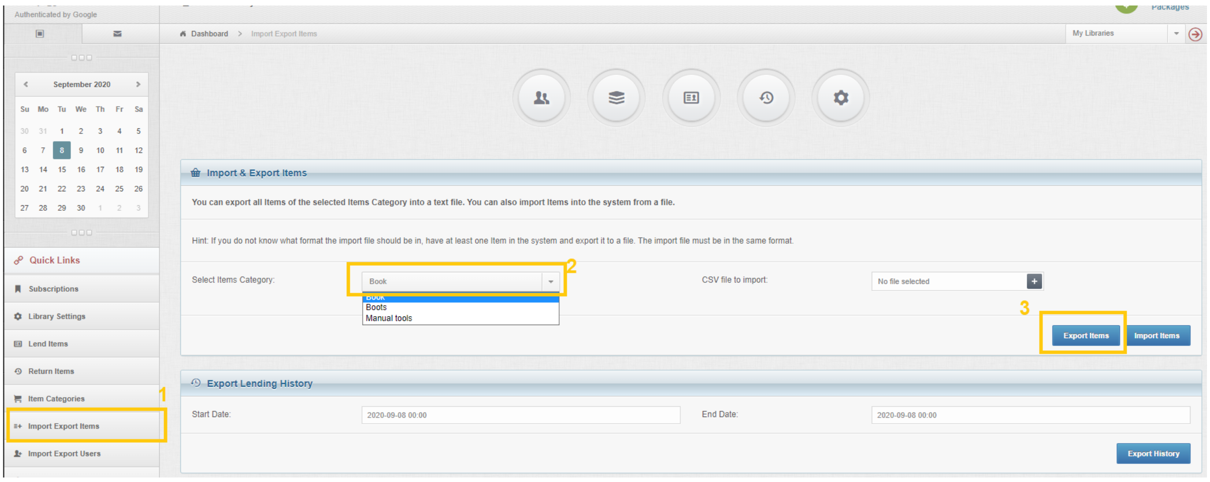
Items from a category can be exported to a CSV file.

To export items into a CSV file which can then be opened as a spreadsheet in Excel do the following;

a) Go to Manage Items and click on "Import Export".

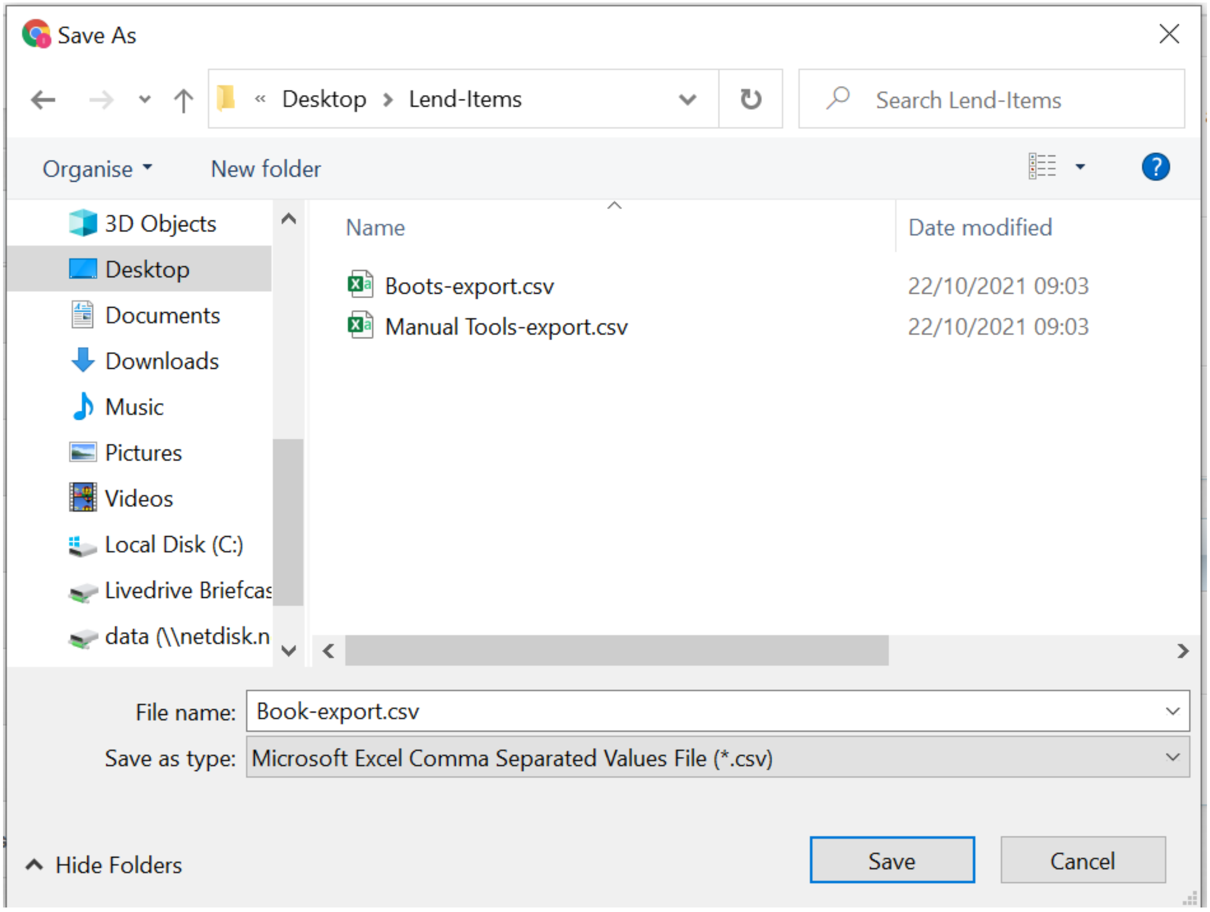


b) Choose the Item Category you wish to export Items for.



c) Click on the "Export items" button

When the Save As dialog box appears, move to the folder you wish to export the CSV file to and press the Save button.



You can then open the exported file in an application such as Excel to view the contents of the file.

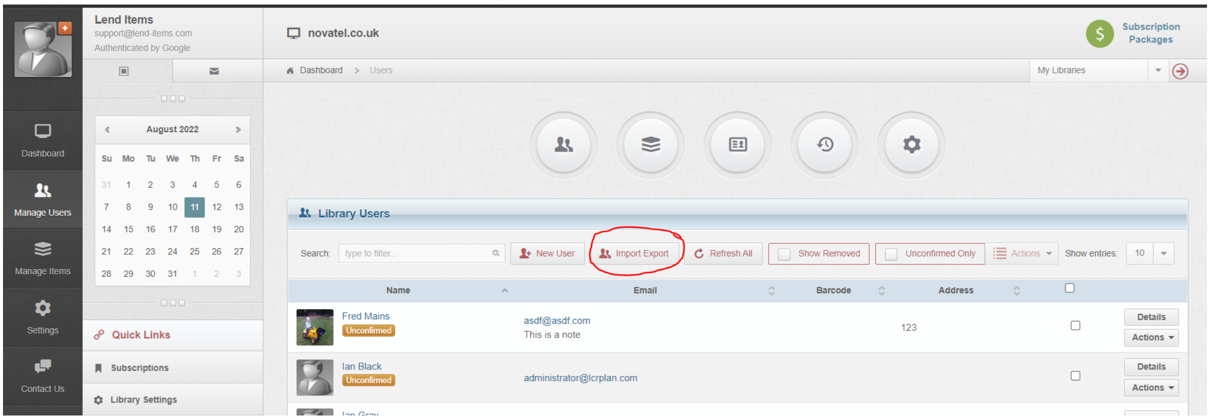
Note that pictures cannot be exported.

Exporting Users

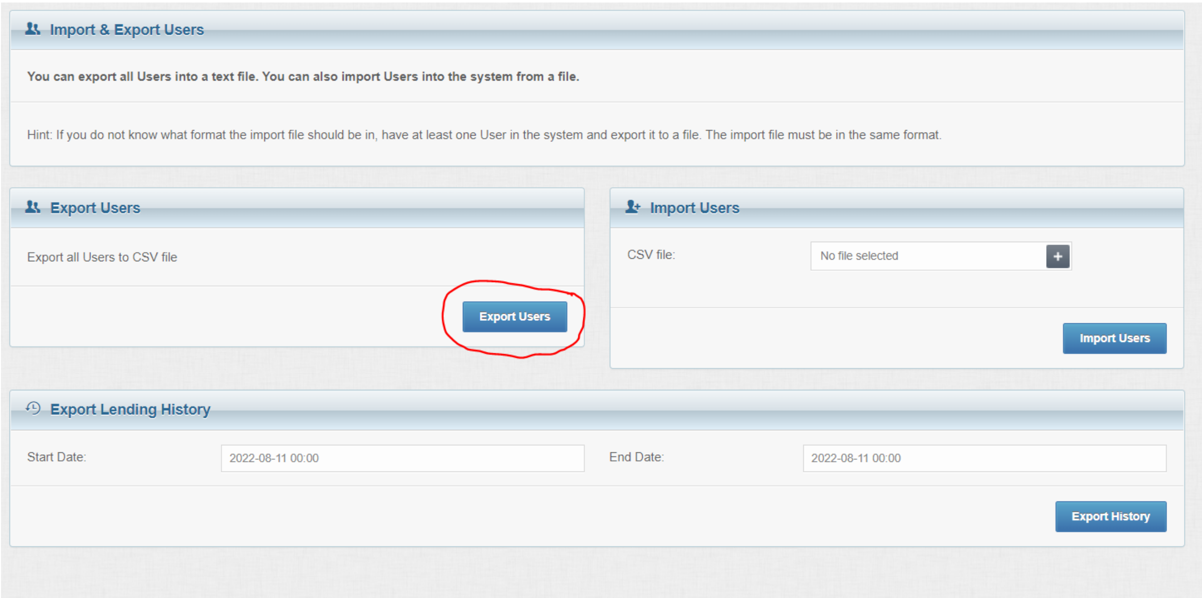
The list of Users can be exported to a CSV file.

To export the list of users into a CSV file which can then be opened as a spreadsheet in Excel do the following;

a) Go to Manage Users and click on "Import Export".



b) On the screen which appears click on Export Users.



When the Save As dialog box appears, move to the folder you wish to export the CSV file to and press the Save button.

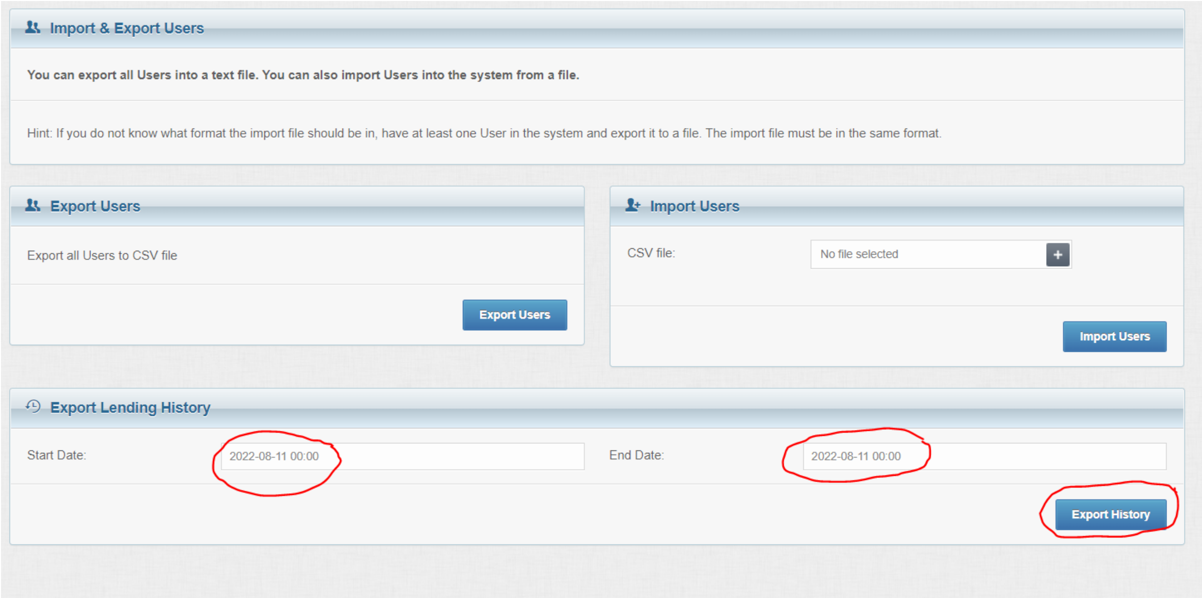
Exporting Lending History

The Lending History of Items and Users can be exported to a CSV file.

To export the Lending History of Items and Users into a CSV file which can then be opened as a spreadsheet in Excel do the following;

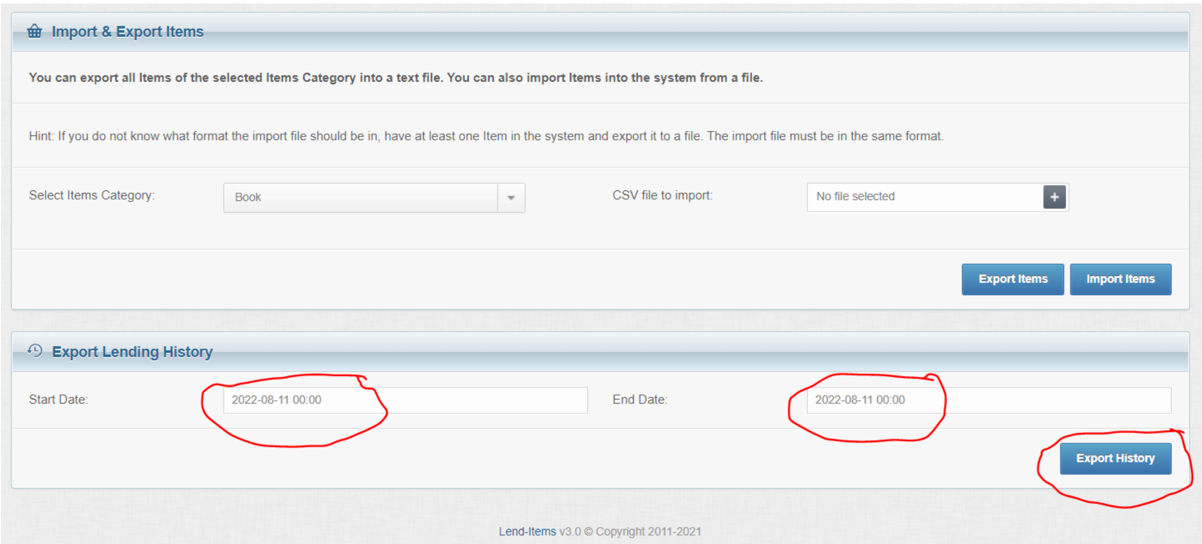
Go to Manage Users or Manage Items and click on the Import-Export button.

If you go through the Manage Users screen you will see the following screen.



Select the date range of lending history you wish to download and then press the Export History button.

If you go through the Manage Items screen you will see the following screen.



Select the date range of lending history you wish to download and then press the Export History button.

Importing Users

The required format of the CSV file can be seen by doing an export of the users you now have. When you do this, you will see that the first field must be the First Name of the user, the second field must be the Last name of the user and the third field must be the email address. The remaining fields are optional.

The following video shows how to import a list of users.
[Importing Users into Lend-Items]()

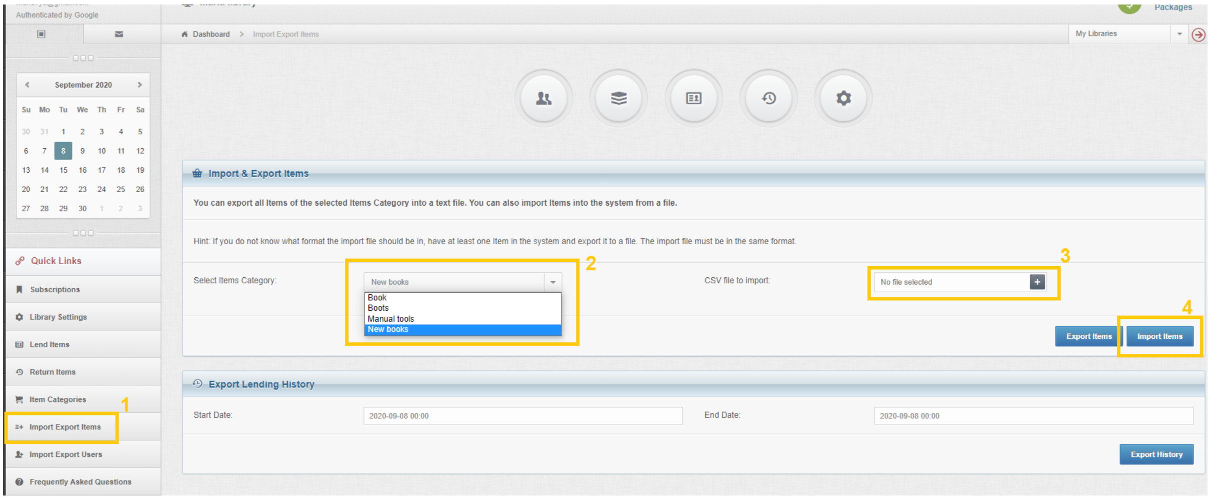
Importing Items

Items can be imported from a CSV into a particular category. The format of the CSV depends on the Category you are importing into.

To find the required format of the CSV file to import items into a category, do an export of the items you now have in that category. You must have at least one Item in the category of interest to export it to a file. The import file must then use the same format as found in the exported file.

Prepare the CSV with the list of items you wish to import being careful to have the correct format for the category you are importing into.

To import the items in the CSV, click on the "Import Export items" button, choose the category you are importing the items into, choose the CSV file to import and click on the "Import" button.



Note that pictures cannot be imported.

Moving Items from one category to another

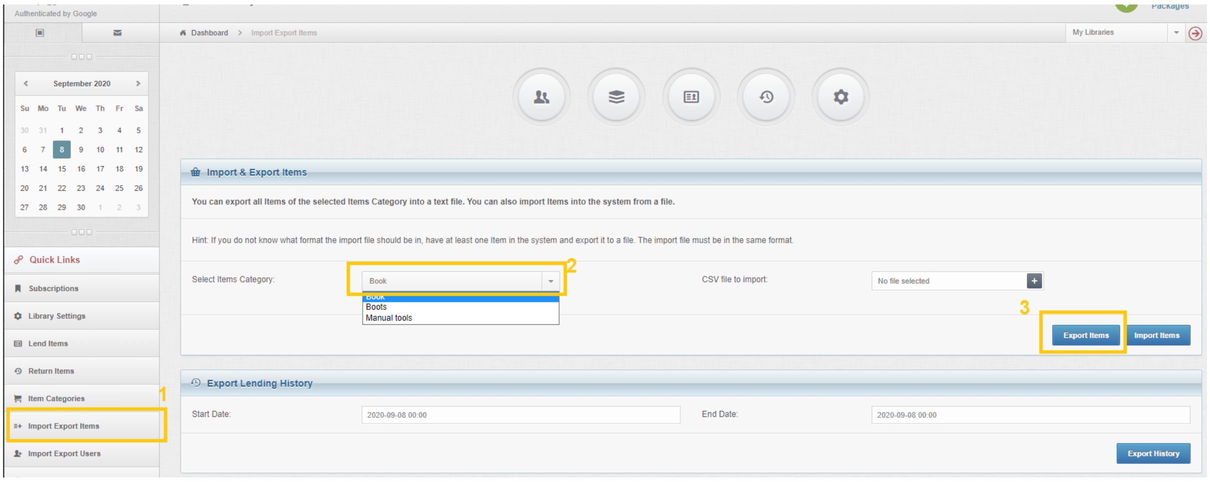
You can't per se move items from one category to another because categories can have different attributes, so items from one category will not be compliant with another category.

However you can export items into an excel spreadsheet, leave in it only items that need to be in the new category, create a new category by copying the old one and changing its name. Then you delete items from the old category. And after that import items from Excel spreadsheet into the new category.

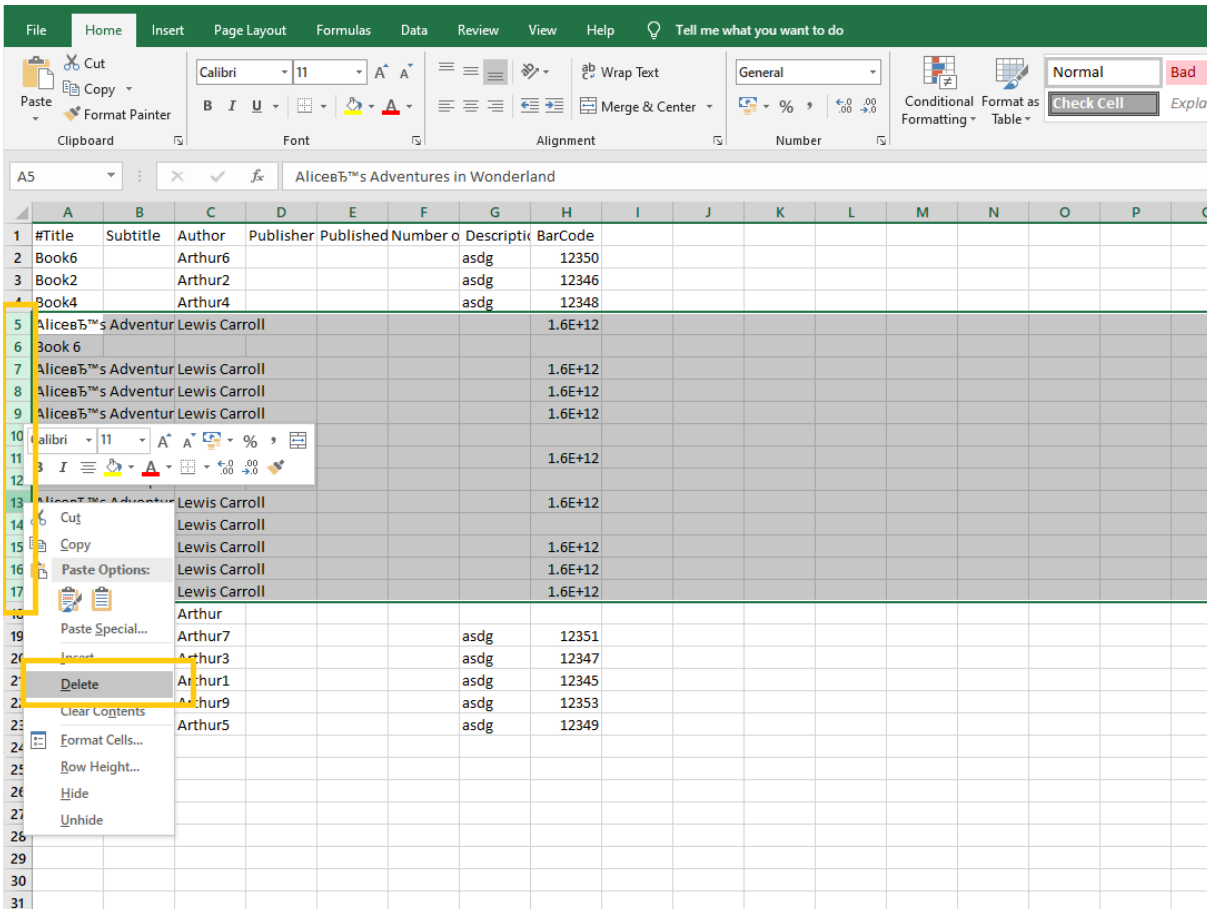
The borrowing history will be lost in this case. And you can't do that for currently borrowed items (you can create a copy of the item in the new category, but you wouldn't be able to remove the original from the old category).

Don't forget to keep files with initial items exported in case something goes wrong.

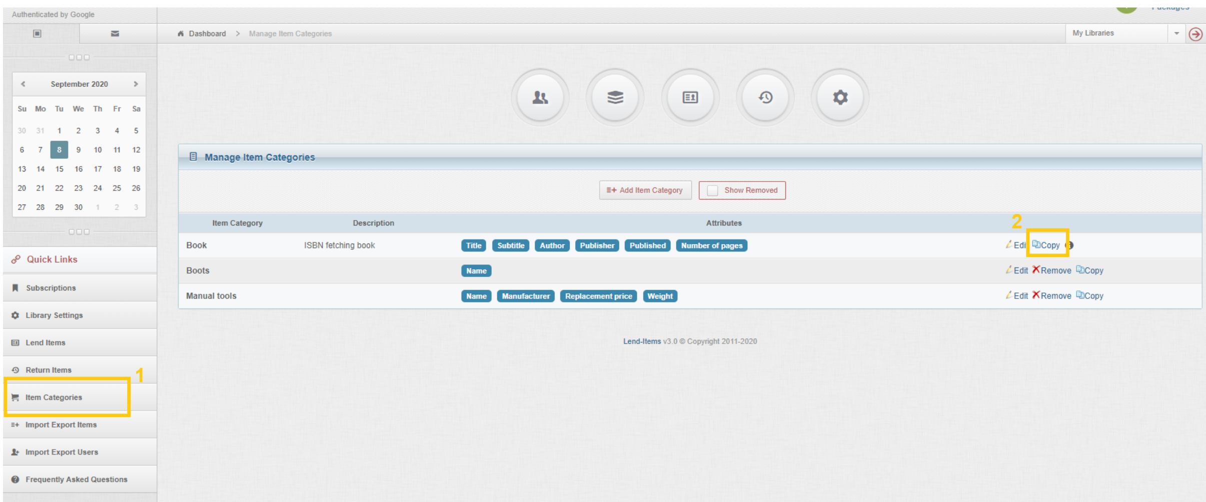
1. Export items into a spreadsheet: "Import Export items" > Choose the old category > "Export items":



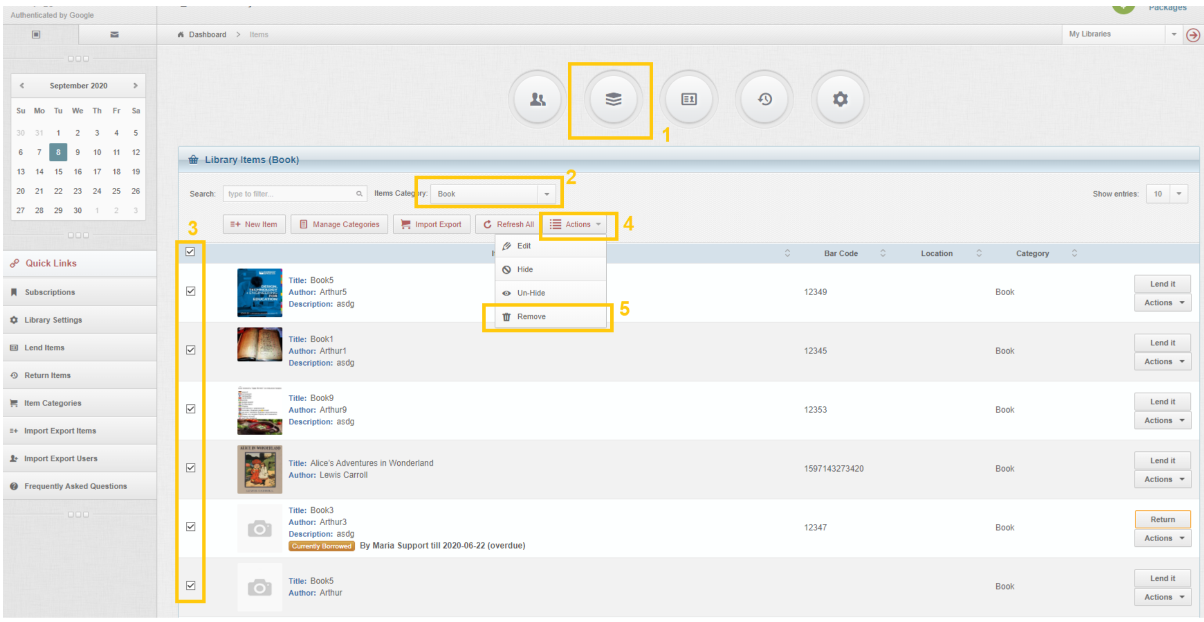
2. In Excel leave only items you need in the new category: Open the exported file in the Excel > Press "Save as" choose a new name for the file > Select lines you don't intend to move to another category (press and drag on the line numbers) > Press right-click somewhere on the selected area (not on line numbers), choose delete. Leave only items you're moving to the new category.



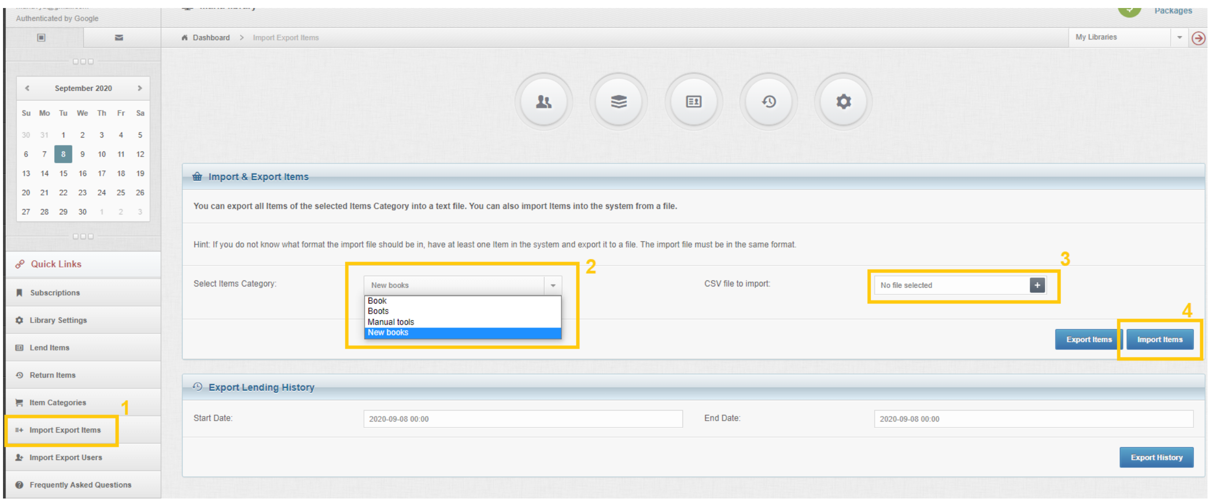
3. Create a new category by copying the old one: "Item categories" page > "Copy" button next to the old category > Change the name of the new category:



4. Delete items from the old category: Manage items > choose old category > select all the items you're moving to the new category (the ones you left undeleted in the Excel spreadsheet on step 2) > Press "Actions" button > Remove. You can't delete already borrowed items.



5. Import items from the Excel spreadsheet into the new category: "Import Export items" > choose the new category > choose your excel file > "Import" button.



Lending

Remarks

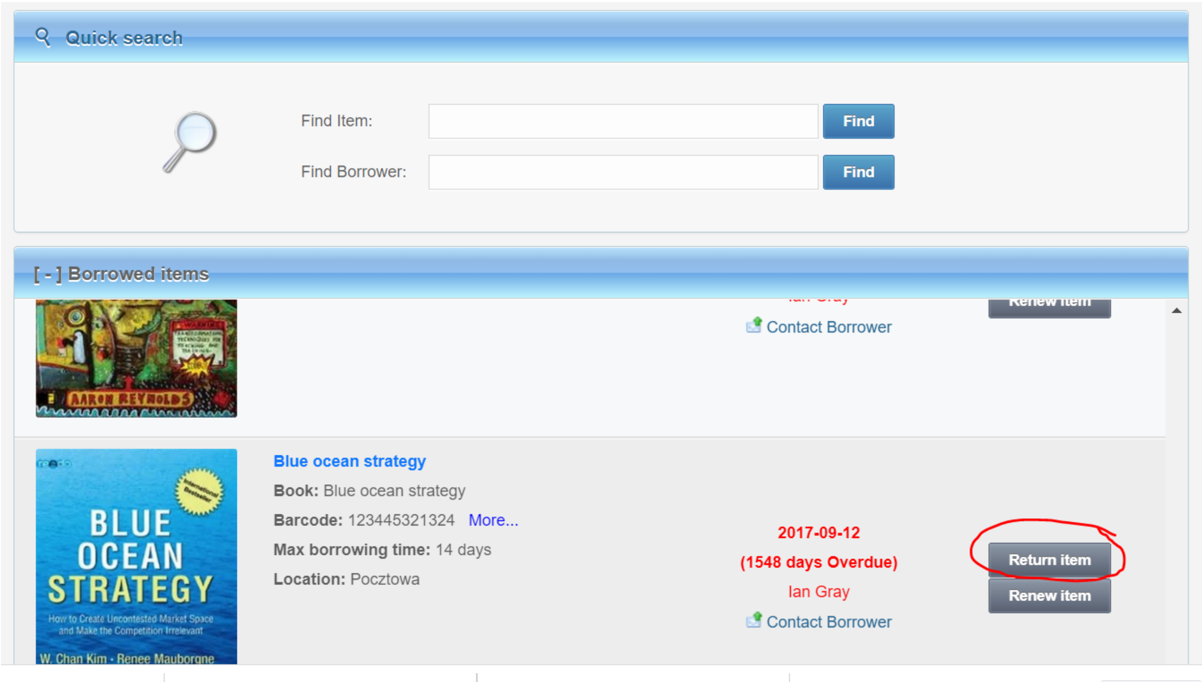
When a user lends an item, a Remark can be recorded about the borrowing of this item.

These remarks are associated with a particular item being lent to a particular user. The remark is personal to that user borrowing that item. Hence other users are not able to view these private remarks, and only Library Administrators can later view these remarks.

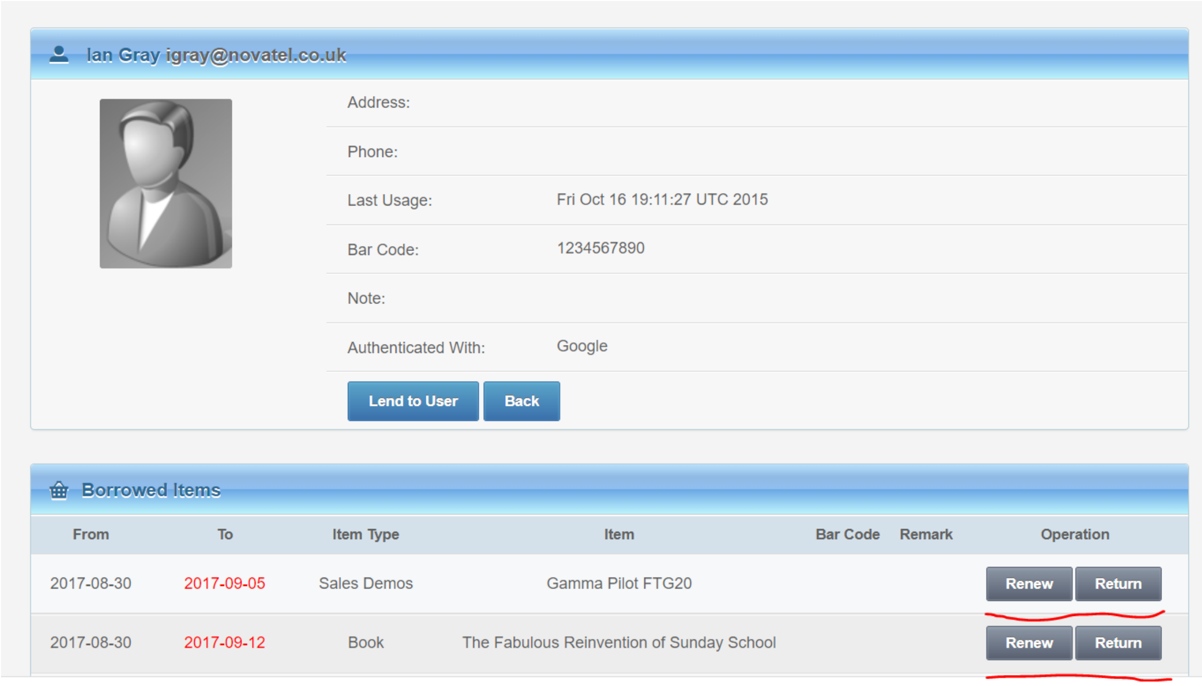
Renew Items

When an item is on loan, it is possible to renew the lending period, before or after the time has become overdue. This is accessible from a number of different areas of the application.

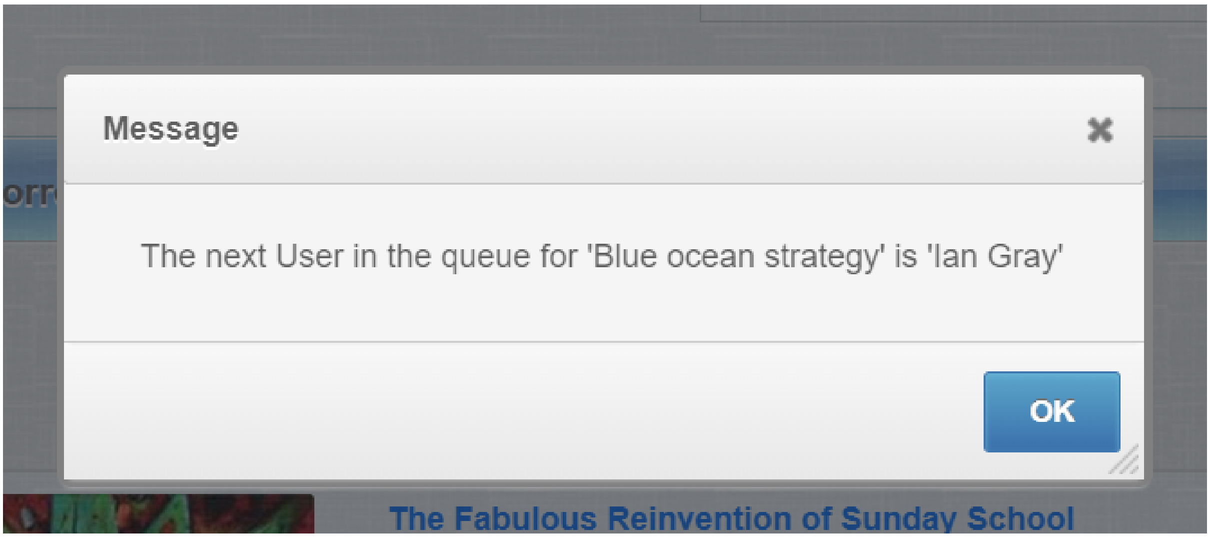
From the Dashboard under the Borrowed section.



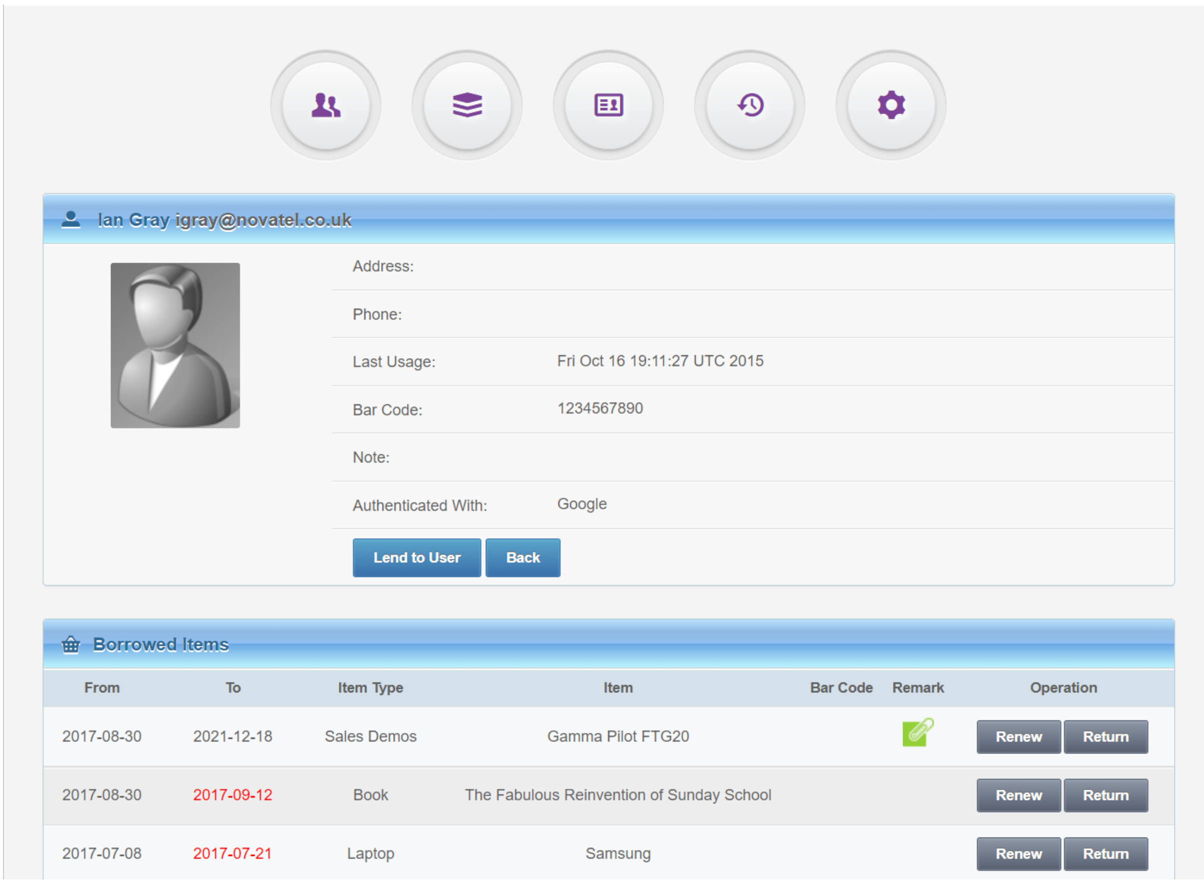
From a users lending history as shown below;



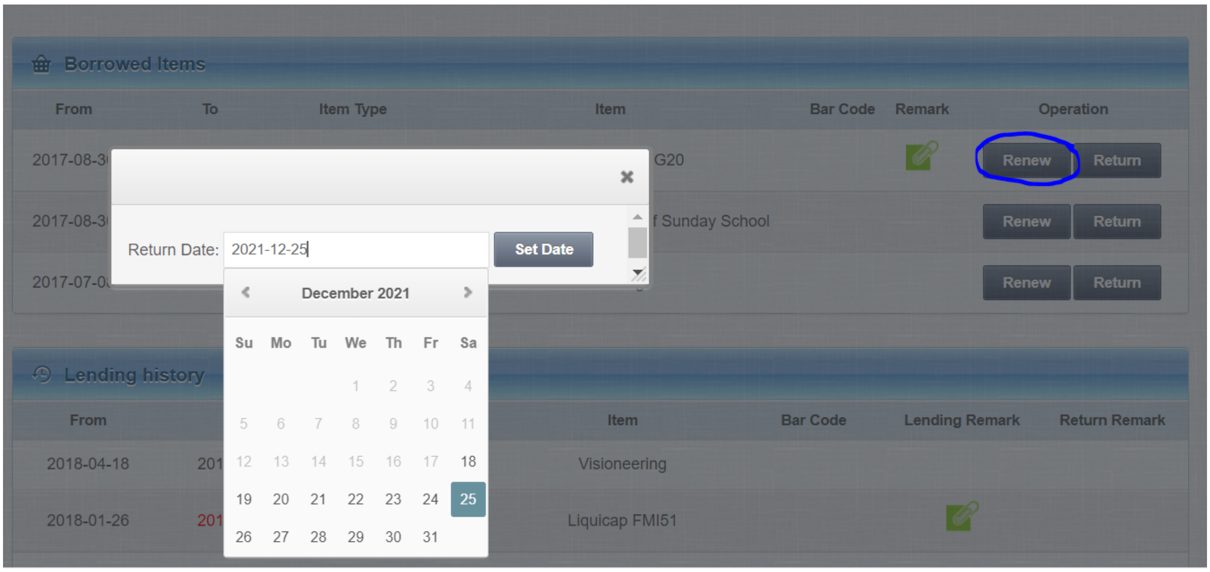
Upon clicking the Renew button, a check is made to see if there is another user waiting in a queue for this item. If there is, then a popup will show to warn of this.



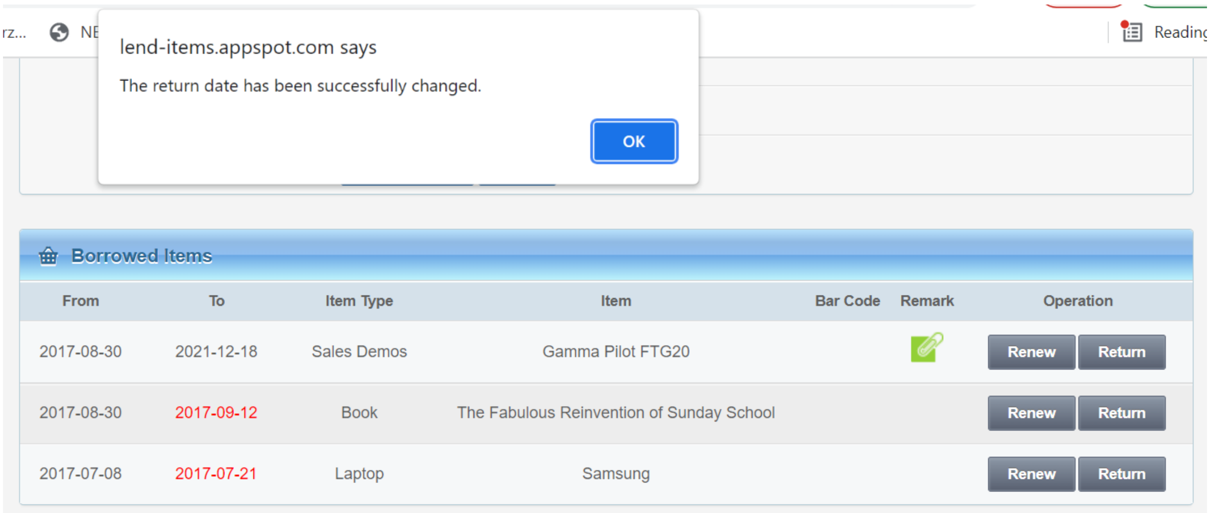
Below is an example of clicking on Renew button of an item where there is no other user in a queue for this item.



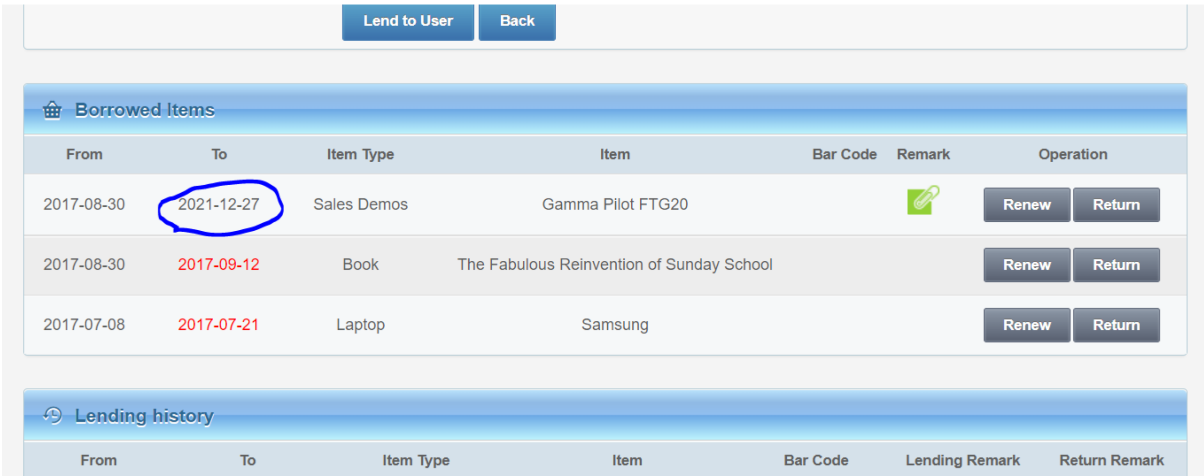
After clicking on the Renew button, if there is no other waiting on this item then a pop up window will appear giving the user the opportunity to set the new return date for the item.



After selecting a date and clicking on the Set Date button, a pop up window will appear confirming that the return date has been successfully changed.



After clicking on the OK button, the display will be updated to show the new return date as shown here.



Return Items

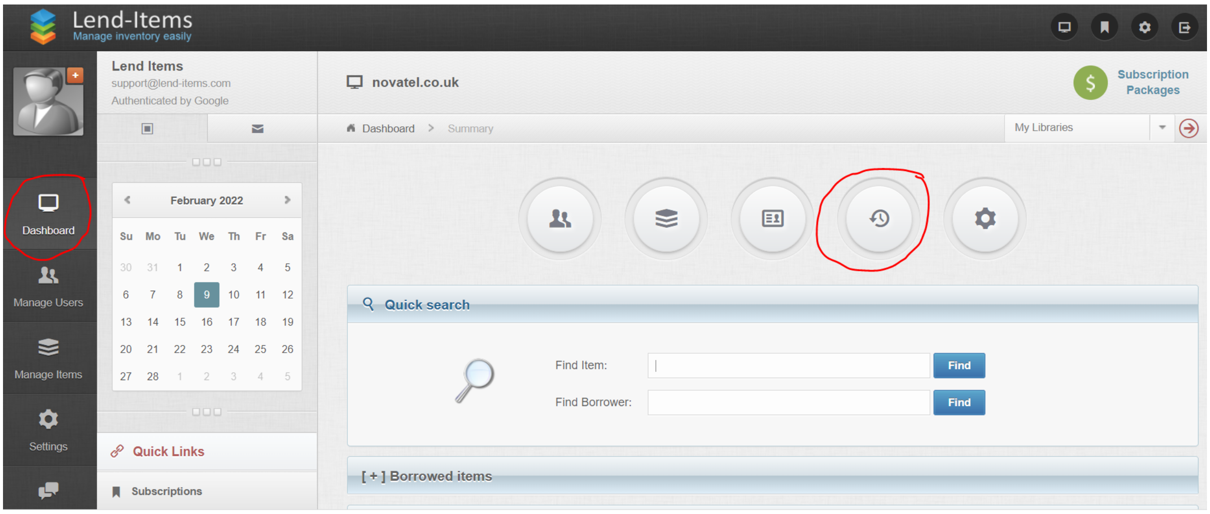
Items can only be registered as return by an Administrator of Lend-Items.

There are multiple ways of returning Items.

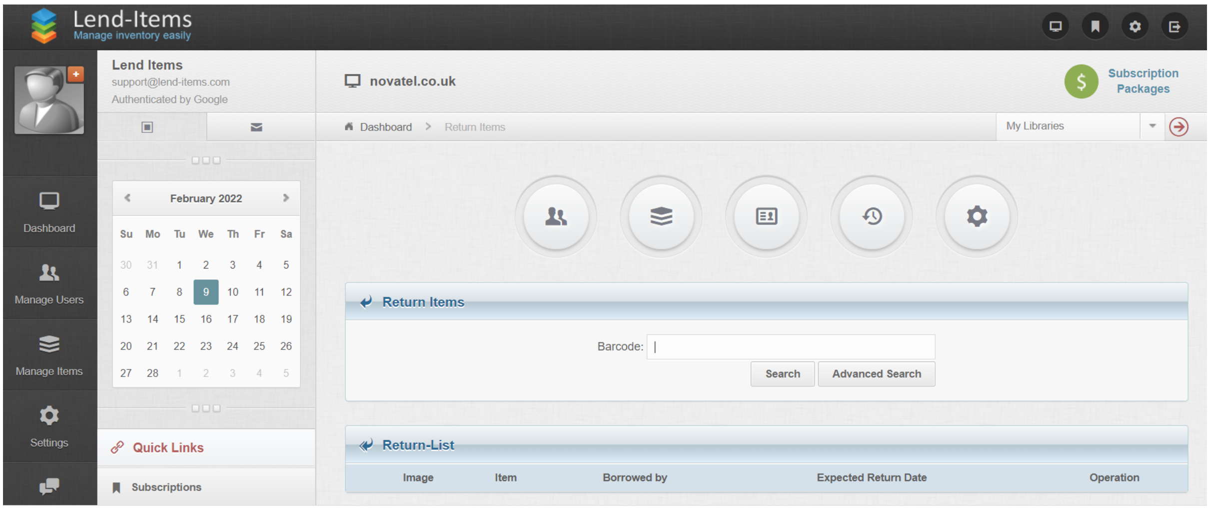
Dashboard Return Items

There are a number of ways of returning items from the Dashboard.

1) The first way is to click on the Return Items Icon.

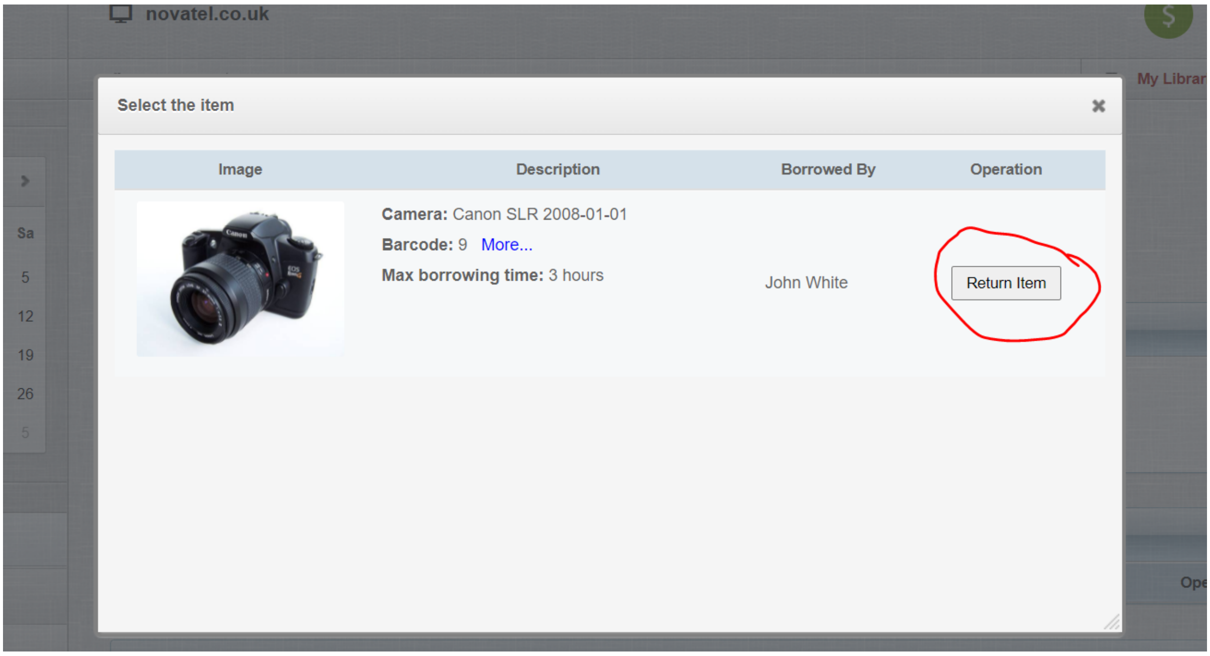


The Return Items screen will display. Note that you do not need to select the user who is returning the items, you only need to specify the item you are returning.

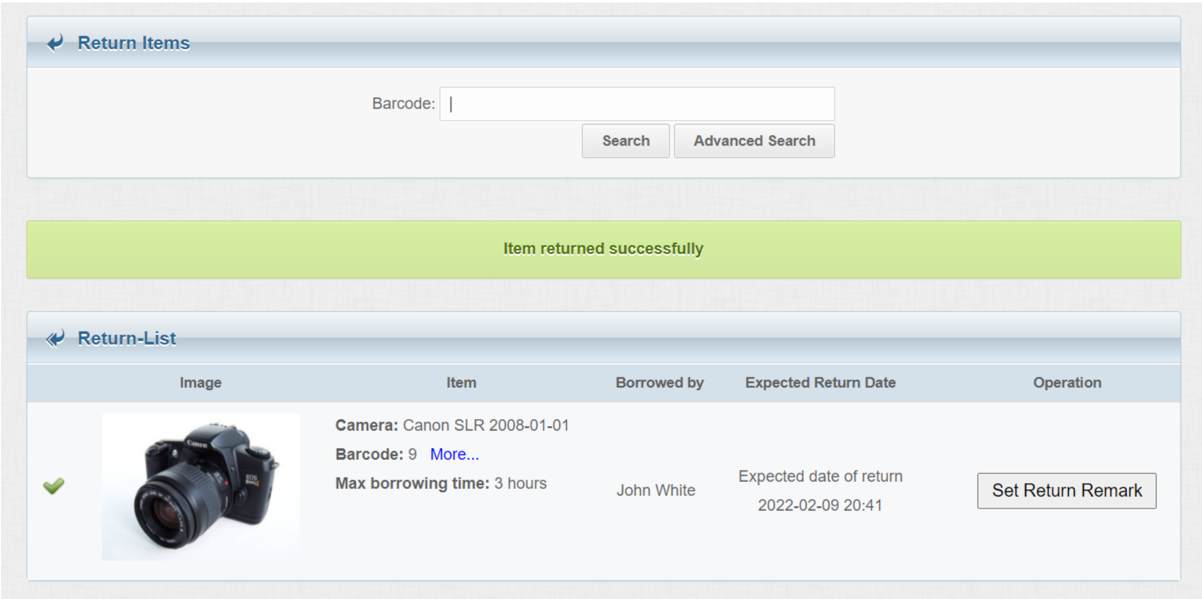


If there is a barcode for the item you are returning, either scan in the barcode or alternatively type in the barcode into the field marked Barcode: and press the Enter key.

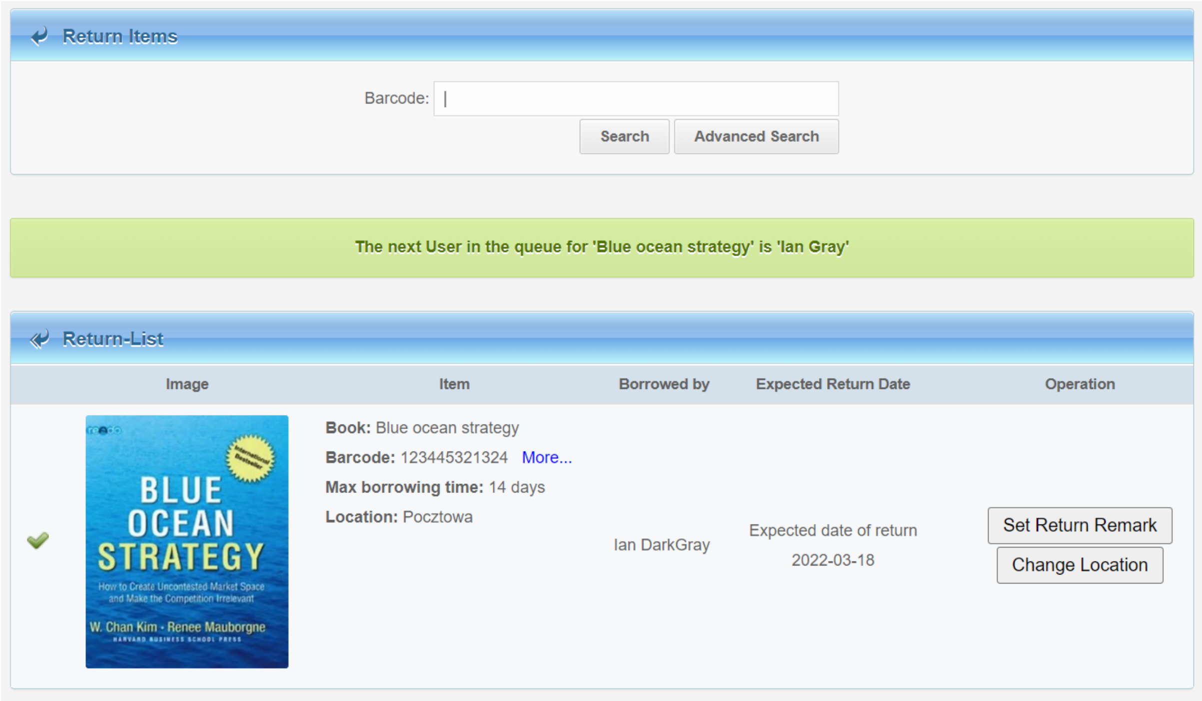
If you are not using barcodes, then search for the item to be returned. For example, entering the text “Canon” might show the following item that needs to be returned.



Simply click on Return Item and the item will be marked as returned, and put in the Returns List as shown here;



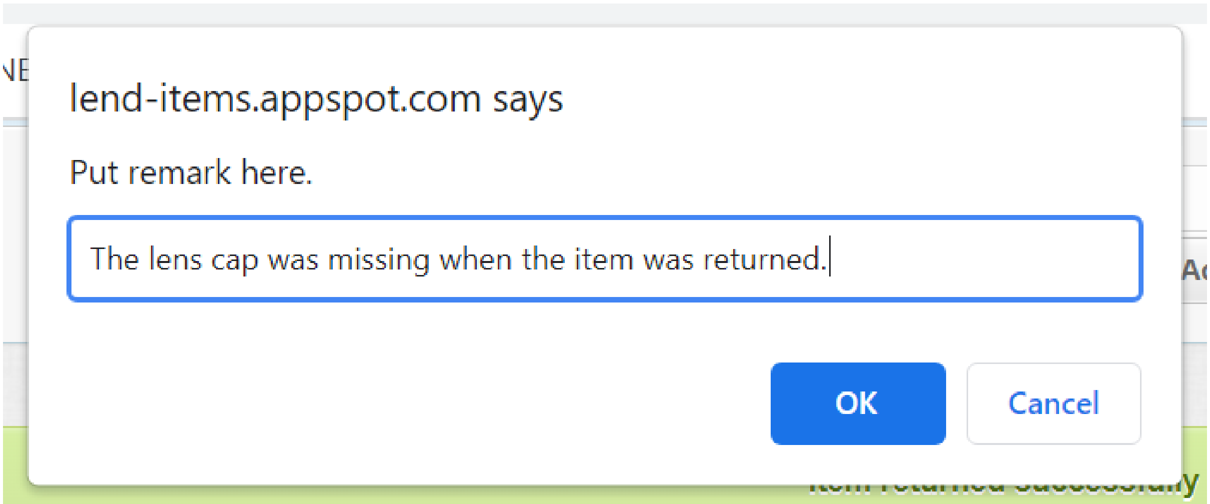
If there are other users waiting for this item, then a message will be displayed to indicate who is the next user in the queue waiting for this item, as shown in the green bar below.



(An email will also be sent to the user to let them know that the item is now available).

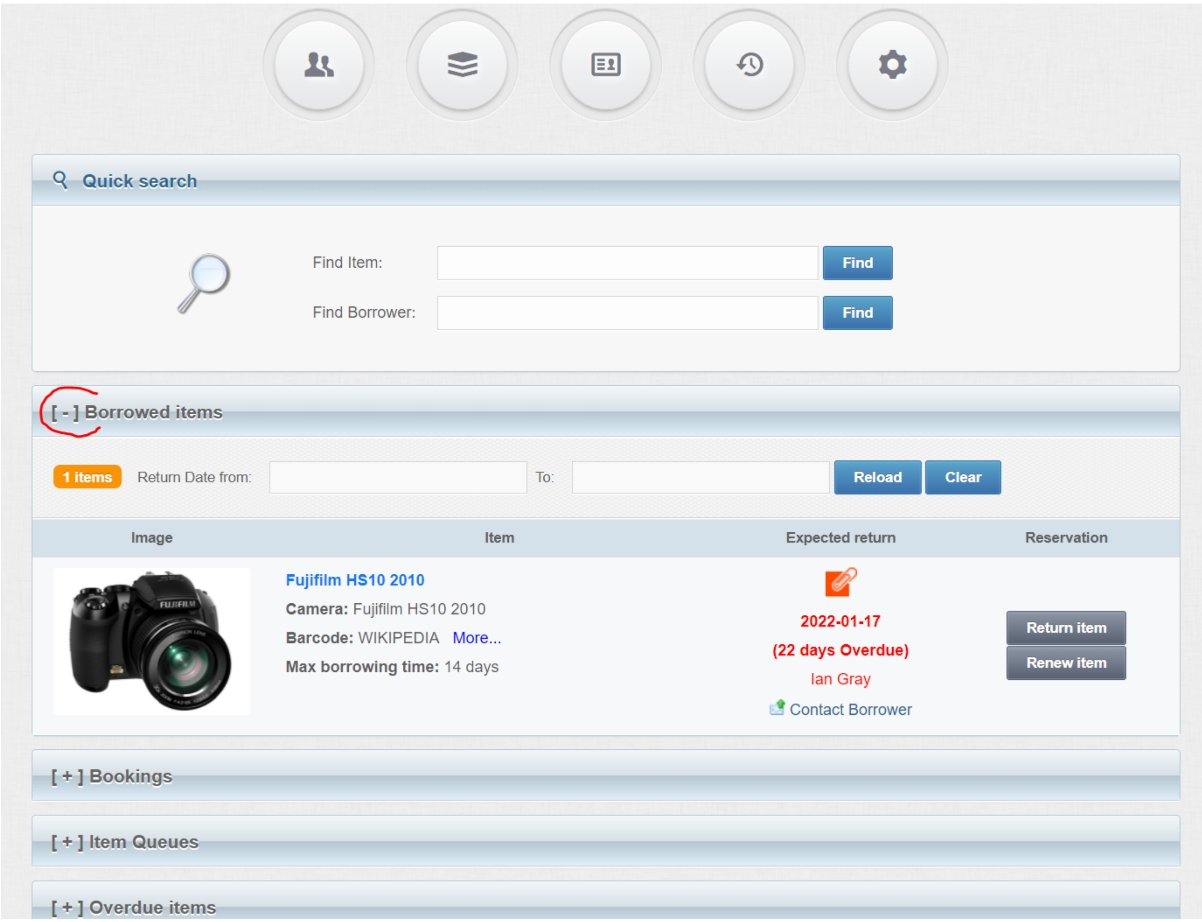
While the item is showing in the Return-List, there is an opportunity to enter a remark associated with the return of this item. To set this remark, click on the Set Return Remark button, which will bring up the popup dialogue allowing you to enter in a remark.

For example, you might enter a remark such as the following;

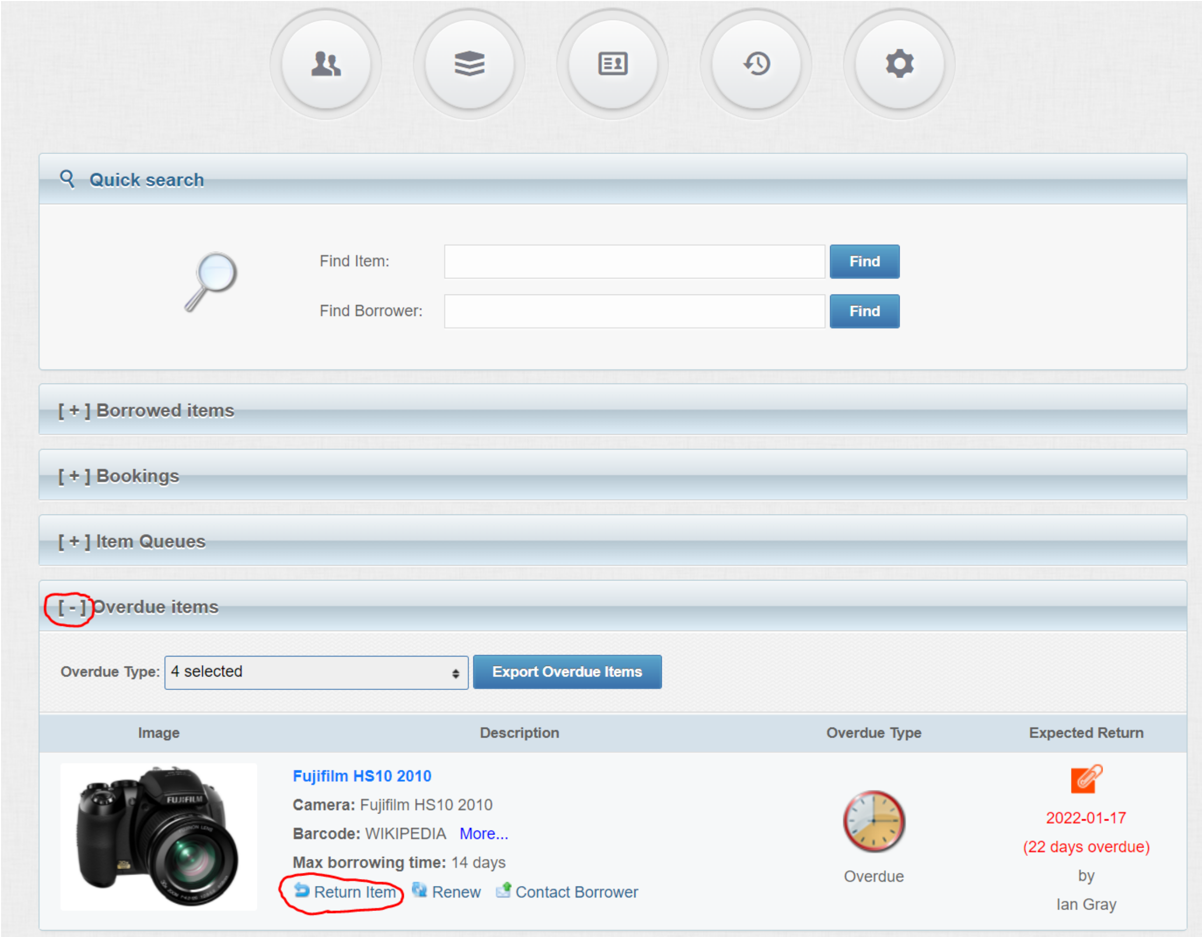


After pressing OK, the Return List will be updated, so that a green icon will appear, and when you hover over this icon, the remark you have entered will be displayed.

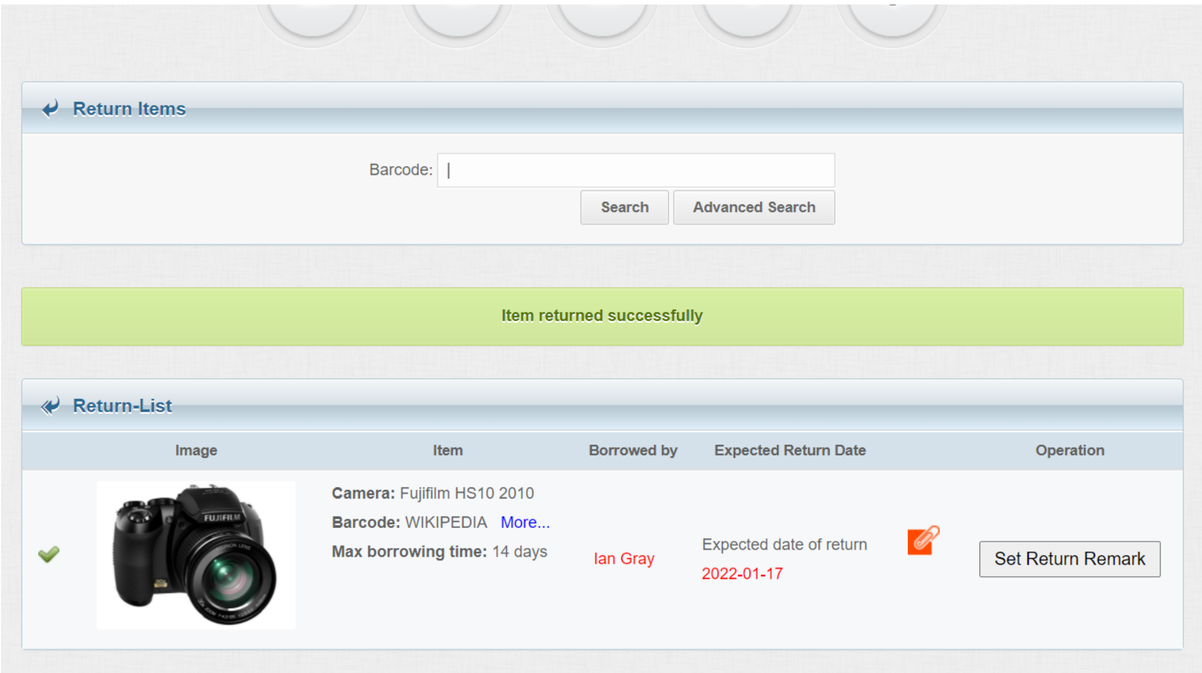
2) The second way of returning items from the Dashboard, is to click on Borrowed Items, to expand this tab, and then click on Return Item for any item you wish to return.



3) A third way of returning Items from the Dashboard is to click on the Overdue items tab, and then click on Return Item on any overdue items you wish to return.

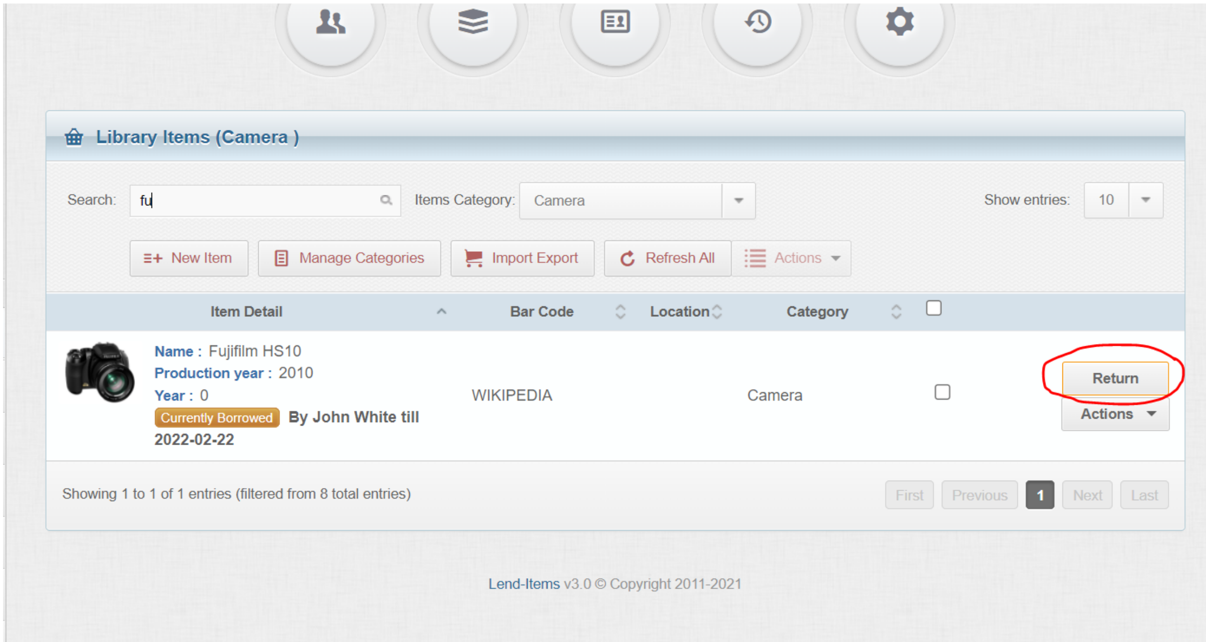


After clicking on the Return item icon, it will bring you back to the main Return Items screen showing the Return List, giving you opportunity to enter a Return remark, as shown.



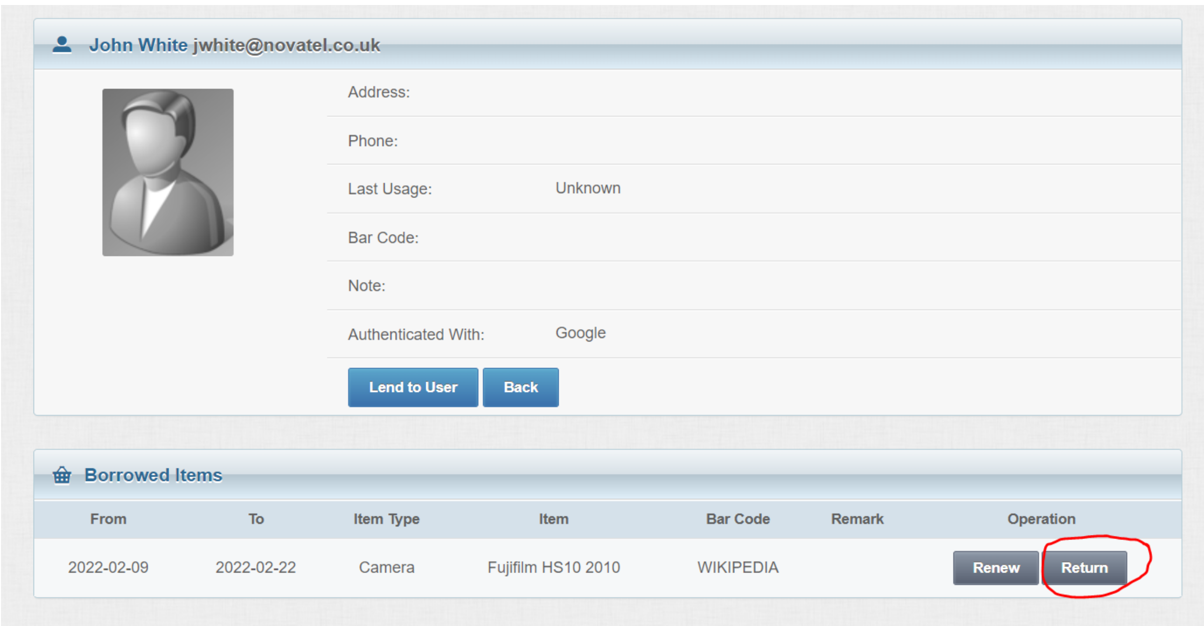
Return from Manage Items

To return an item, another way is to select the Manage Items screen, search for the item and click on the Return button for a currently Borrowed Item you wish to return.



Return from Manage Users

To return items for a user, select Manage Users screen, search for the user, and select Details for this User. Directly below the main details for this user, there is a section showing the Borrowed Items for this user. Simply click on Return for any item you wish to return.



Categories

Categories, also known as Item Types, allow you to create particular types of items composed of a set of fields/attributes that enables you to store the most relevant information about these kinds of items. For example, if you wish to keep an inventory of bicycles, then you would create the Category “Bicycle” and it could include fields/attributes such as Size and Color. If you wanted to keep an inventory of paintings, then you would create the Category “Paintings” and it could include fields/attributes such as Artist, Style and Size.

Book Category

The Book Category is a special type of category which has integration with the ISBN database, enabling the user to look up the ISBN number for a particular book and automatically gather information about the book such as the Title, Author and often the cover page image.

Simply type in or scan the barcode into the ISBN field and the Title, Author and other fields will be automatically filled.

Currently we are using two systems to fetch book information based on ISBN;

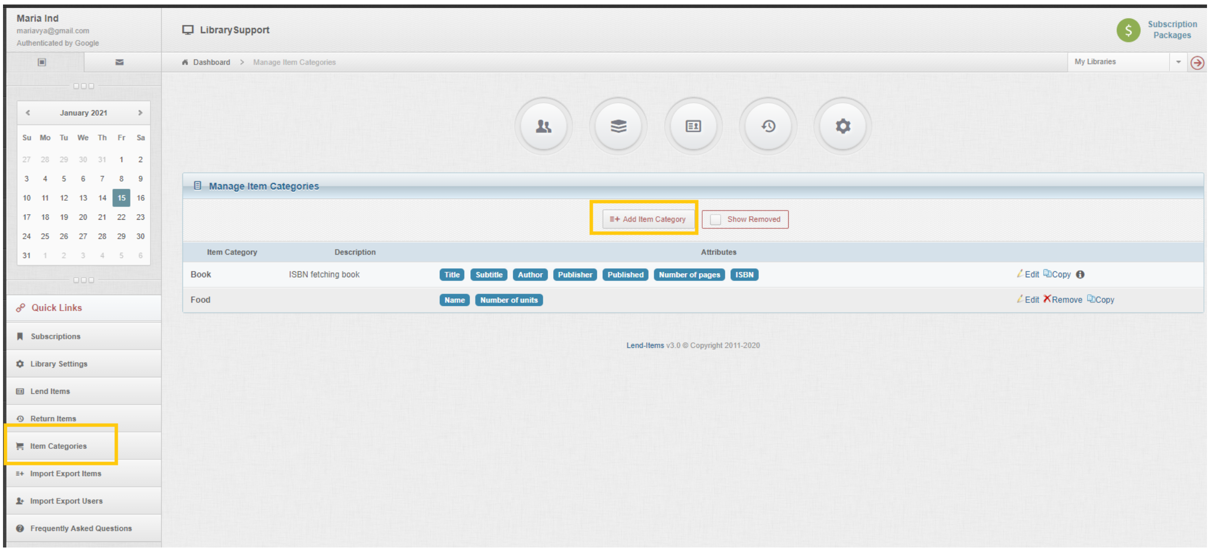
- Open Library
- ISBN DB

If the provided ISBN is not in one of these databases then we are unable to provide details about the book. In the future we may integrate other ISBN searches if there is sufficient demand for this.

Currently it is not possible to remove the Book category, because it has integration with the ISBN database, and is always needed for possible future cloning of a category. All other categories can be removed.

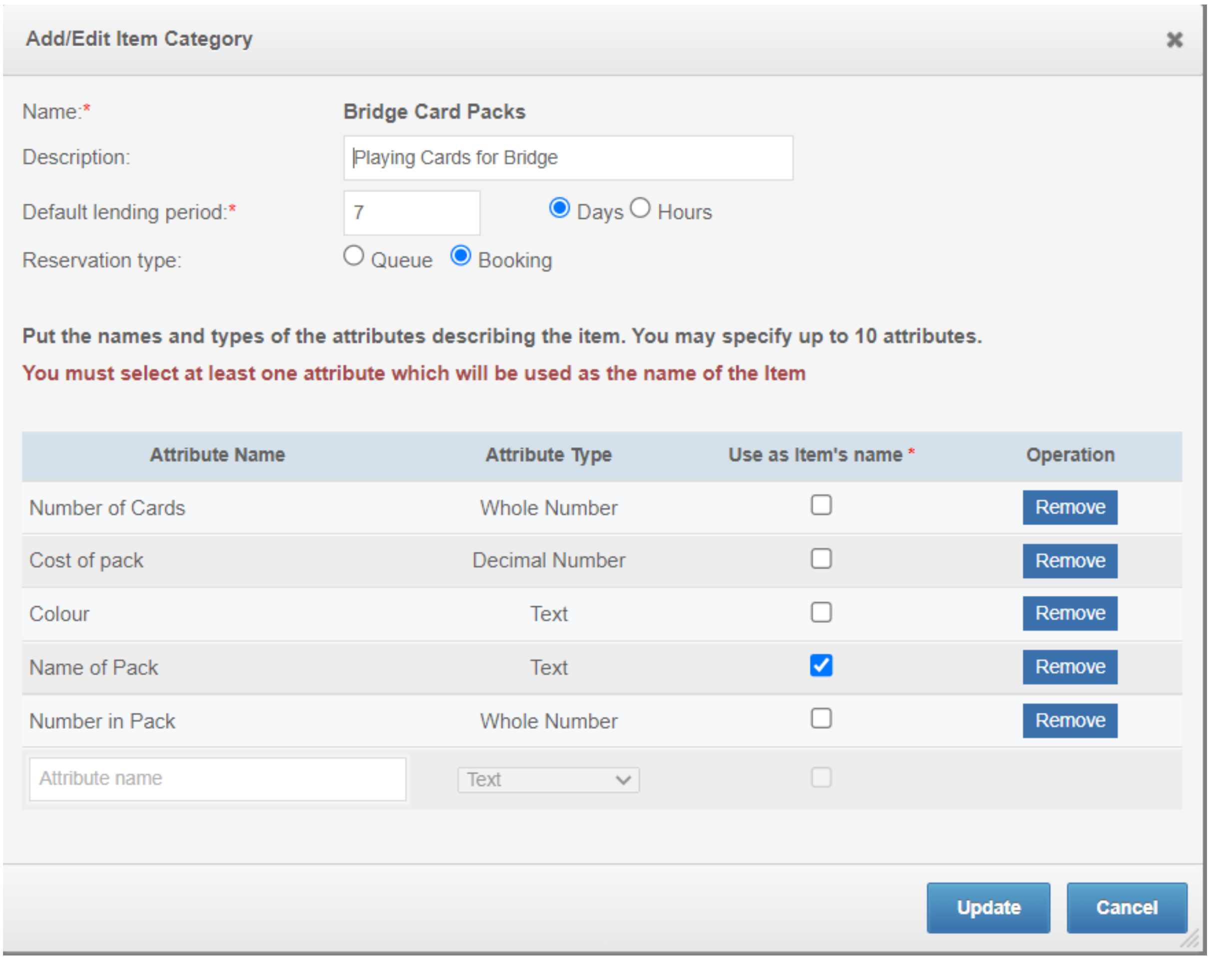
Adding a category

You can create new categories on the "Item categories" page. To add a new category, click on the “Add Item Category” button as shown below.



When a category is added the system will automatically include the fields:

- Description
- Default Lending period, and units of time.
- Reservation type
- Barcode



Description

This should be a simple description that best describes what this category is used for.

Default Lending Period and Units of Time

The default Lending period defines the default period of time that items in the category should be lent out for and can be specified in days or hours. If this field is later edited, then items of this category created after that will inherit the new default lending period.

Reservation Type

When setting up a new category you need to define the Reservation type, the options being Booking or Queue.

Booking is a reservation where the user specifies the dates/times when they want to borrow the Item (e.g. From April 25th to May 10th).

Queue is where the user places themselves in the queue of users who are waiting for this Item to become available.

Barcode

If you use barcodes to identify your items then this is the field where the barcode should be entered.

Attribute Fields

You can specify up to 10 attribute fields to describe or define your item.

For each attribute you can define the type of data it can contain being one of the following;

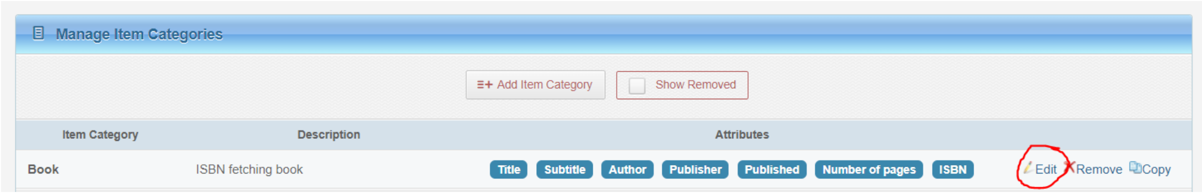
- Text
- Whole Number
- Decimal Number
- Date
- URL
- Email

As soon as you start to type in to the Attribute Name field, this will enable the Attribute Type drop down menu to select the desired data type for this attribute.

When setting up a category it is mandatory for each category to have at least one field marked as "Name". However the Name that the item is known as can be a combination of fields as selected in the Use as Item’s name column as shown above.

Editing a Category

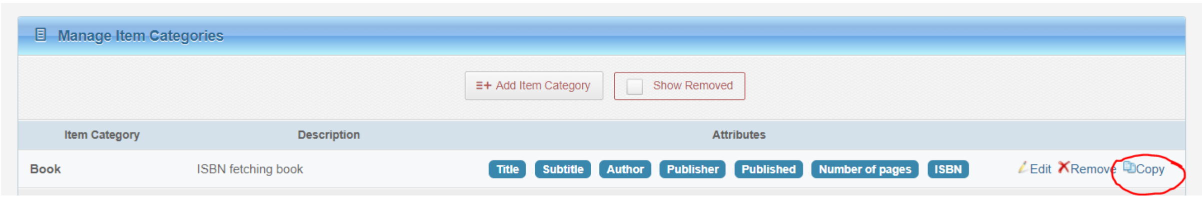
To edit an existing category click on the Edit button for the category to edit as shown below.



This will then bring up the common window which is used when adding a new category or editing an existing category, as shown below.

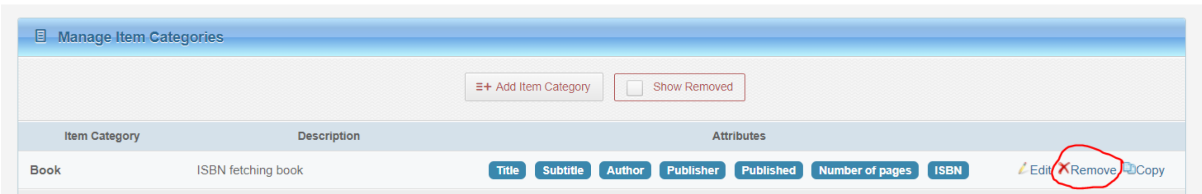
Copying a Category

A new category can be created by taking a clone of another category and then modifying as required. To copy a category, simply click on the Copy button for the category you wish to clone, as shown here;

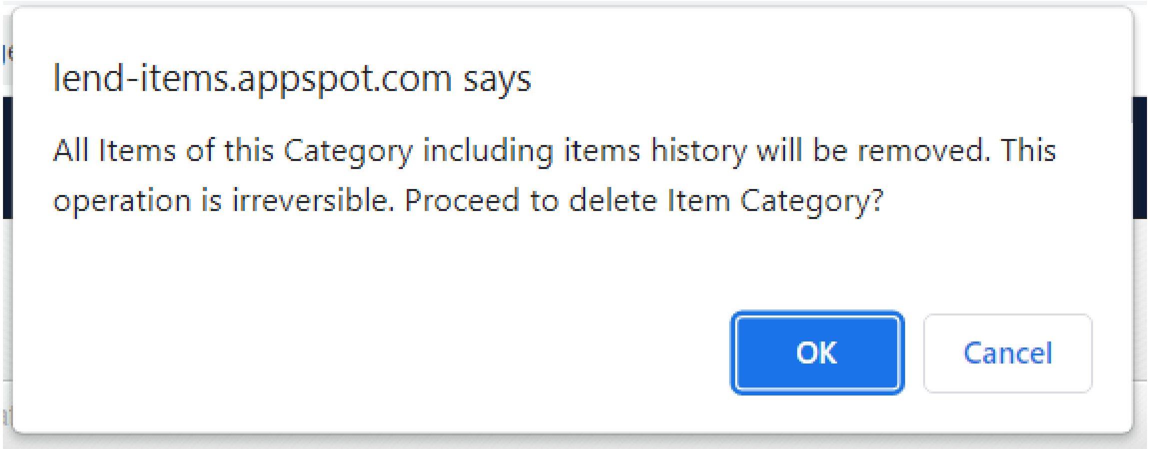


Removing a Category

To remove a category, simply click on the Remove button for the particular category you wish to remove as shown here;



After clicking on the Remove button you will be prompted to confirm the action. It will remind the user that all Items of this Category including items history will be removed and that this operation is irreversible. Press the Ok button to confirm the deletion of this Item Category.



Moving Items from one Category to another

Unfortunately, there is no possibility to move items from one category to another, because categories can have different sets of properties and fields. The only way is to export all your existing items in a csv file, massage the contents as required and then re-import them into the new category. However with this approach all the lending history and items' images will be lost.

Changing Category

Once a category has been created, you can add extra attributes, or remove attributes, but it is not possible to change an existing attribute.

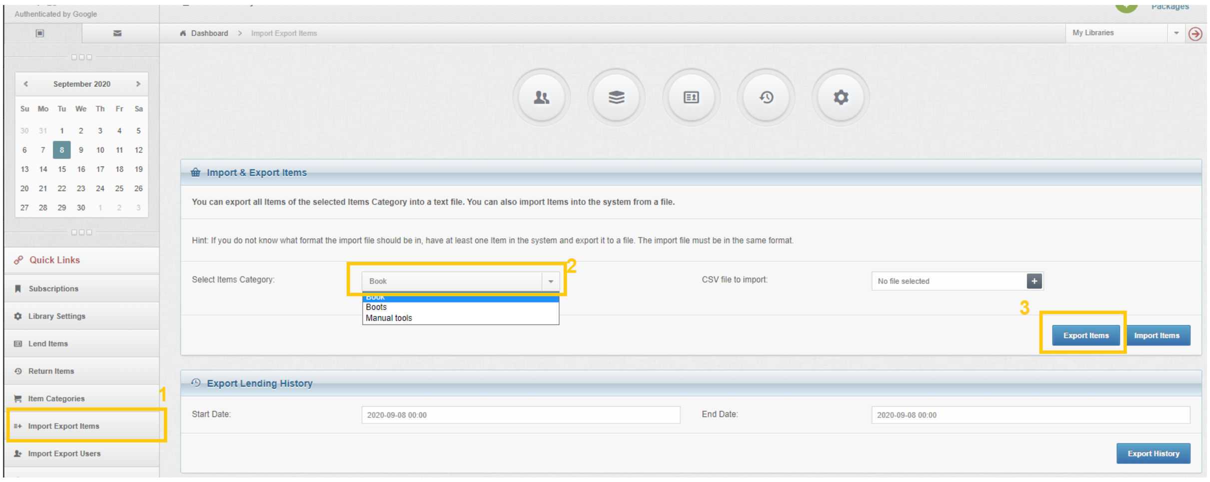
You cannot move items from one category to another because item categories can have different sets of properties, which makes items from one category incompatible with other categories.

However you can export items into an excel spreadsheet, leave in it only items that need to be in the new category, create a new category by copying the old one and changing its name. Then you delete items from the old category. And after that import items from Excel spreadsheet into the new category.

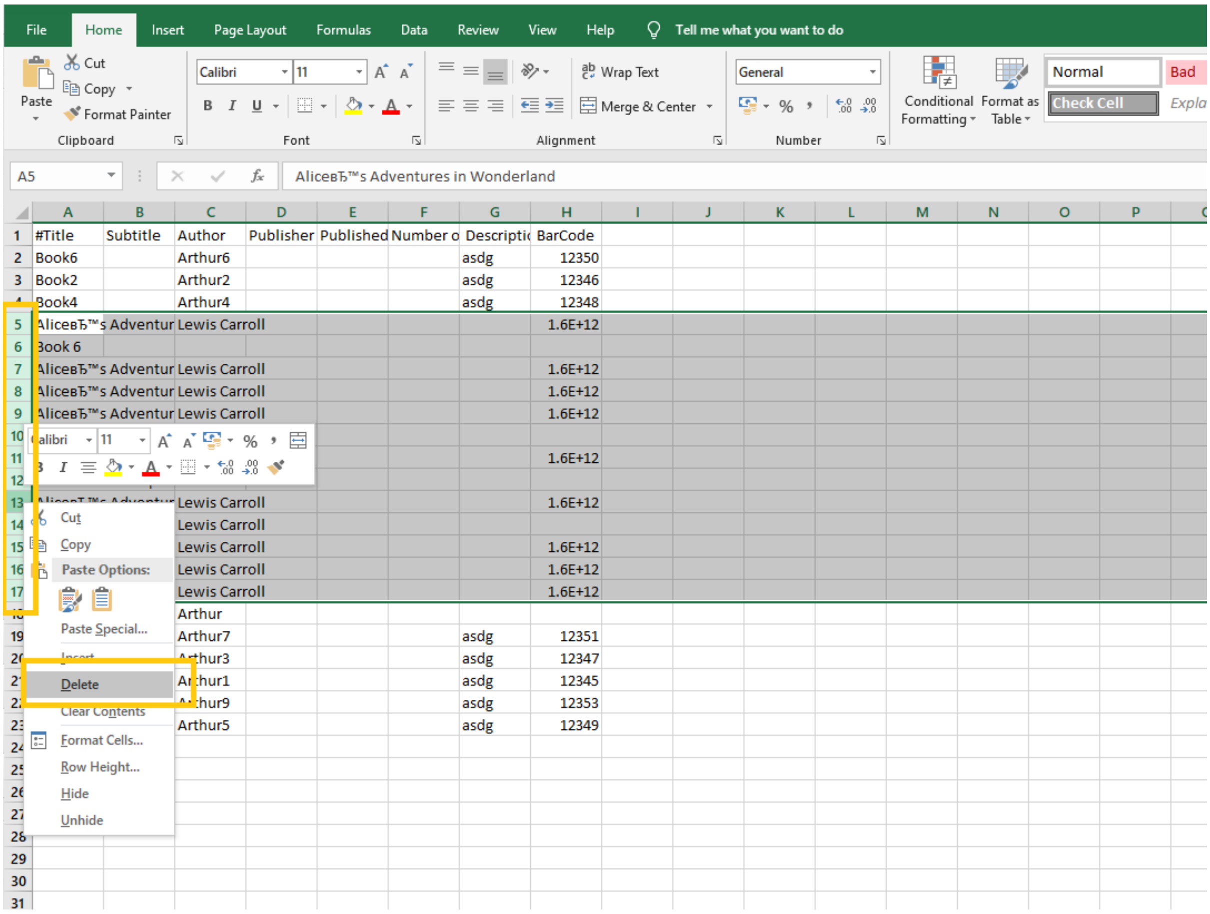
The borrowing history will be lost in this case. And you can't do that for currently borrowed items (you can create a copy of the item in the new category, but you wouldn't be able to remove the original from the old category).

Don't forget to retain the files with the initial items exported in case something goes wrong.

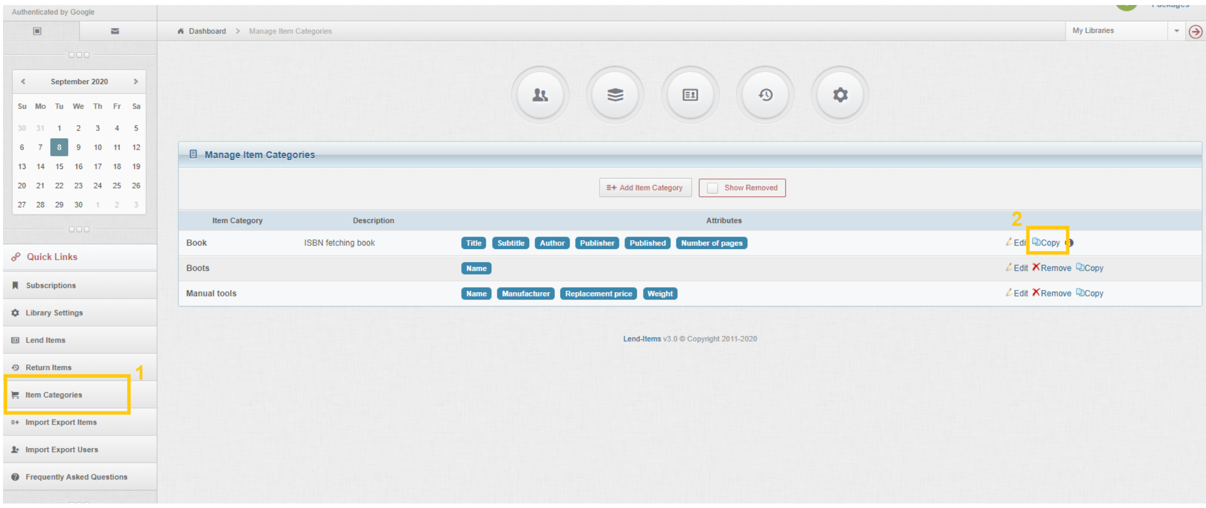
1. Export items into a spreadsheet: "Import Export items" > Choose the old category > "Export items":



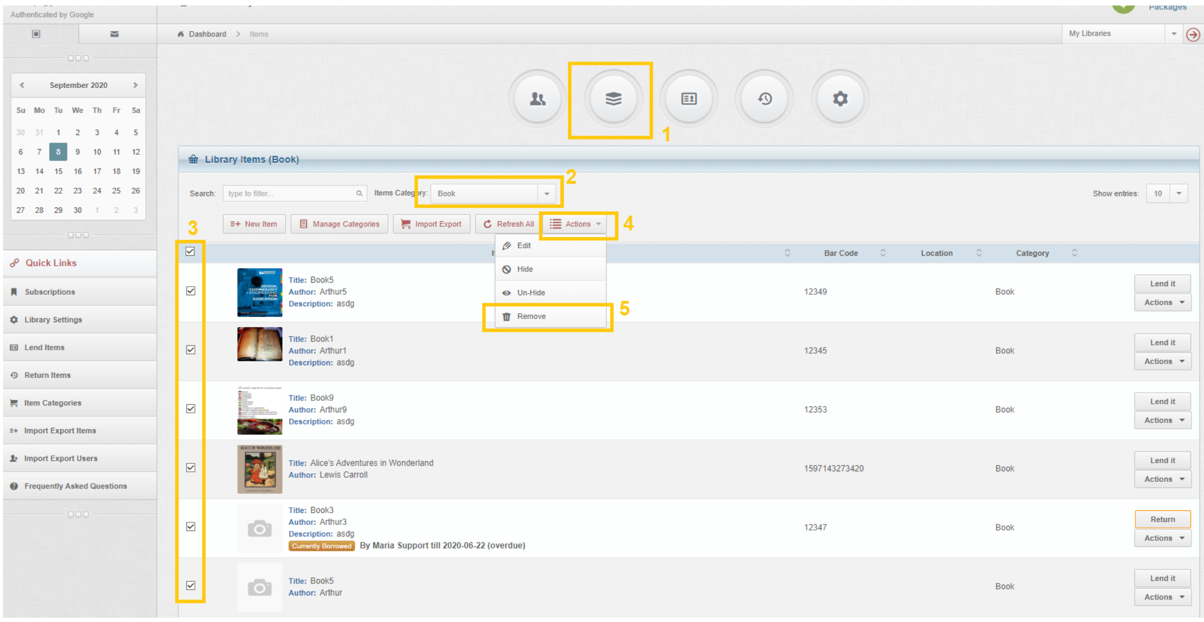
2. In Excel leave only items you need in the new category: Open the exported file in the Excel > Press "Save as" choose a new name for the file > Select lines you don't intend to move to another category (press and drag on the line numbers) > Press right-click somewhere on the selected area (not on line numbers), choose delete. Leave only items you're moving to the new category.



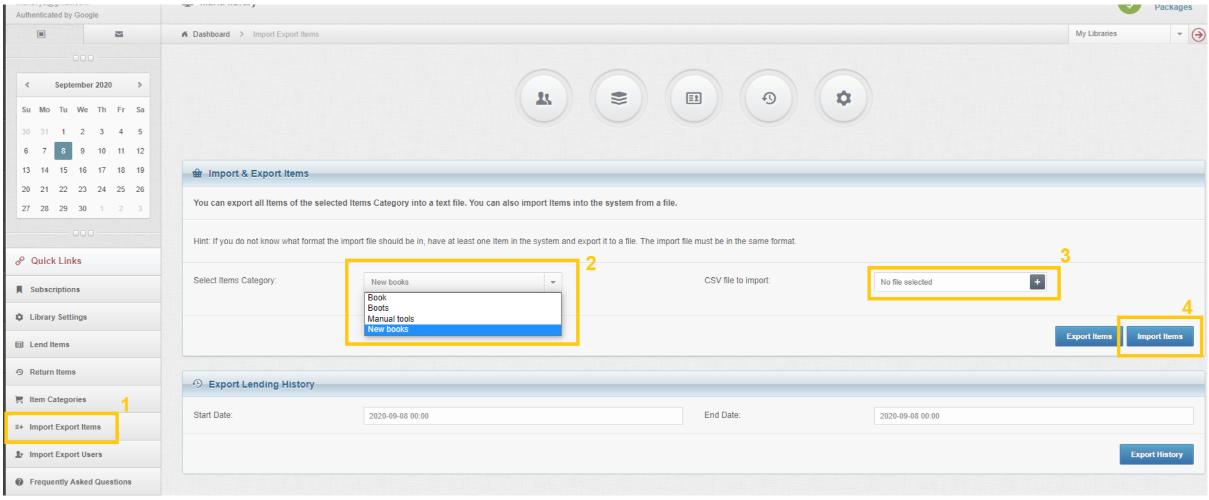
3. Create a new category by copying the old one: "Item categories" page > "Copy" button next to the old category > Change the name of the new category:



4. Delete items from the old category: Manage items > choose old category > select all the items you're moving to the new category (the ones you left undeleted in the Excel spreadsheet on step 2) > Press "Actions" button > Remove. You can't delete already borrowed items.



5. Import items from the Excel spreadsheet into the new category: "Import Export items" > choose the new category > choose your excel file > "Import" button.


Import & Export Items
You can export all Items of the selected Items Category into a text file. You can also import Items into the system from a file.
Hint: If you do not know what format the import file should be in, have at least one item in the system and export it to a file. The import file must be in the same format.
Select Items Category:
New books
Book
Boots
Manual tools
New books
CSV file to import:
No file selected
Export Items
Import Items
Export Lending History
Start Date:
2020-09-08 00:00
End Date:
2020-09-08 00:00
Export History
Quick Links
Subscriptions
Library Settings
Lend Items
Return Items
Item Categories
Import Export Items
Import Export Users
Frequently Asked Questions
September 2020
Dashboard
Import Export Items
My Libraries
Packages
Authenticated by Google
1
2
3
4

Reservations

These are two different ways of reserving Items in Lend-Items. Each Item in the Library is configured to support one of these types. This is set while creating a new Item. You can also change it later by editing an Item, however, it may affect the already existing reservations for this Item.

The difference between these two ways of making reservations is explained below.

Booking is a reservation where the user specifies the dates/times when they want to borrow the Item (e.g. From April 25th to May 10th).

Queue is a reservation where you don't want the users to specify the date of borrowing. For example: If you have an Item which sometimes is borrowed for a day or two and sometimes for even two weeks, and many people want to borrow it as soon as it is available. For the queue type the users don't say *'I want this Item from April 25th'*, they say *'I want this Item as soon as it's available. Add me into the user-queue for this Item and I will wait until my turn comes'*. It's like a regular queue - e.g. when you are the 2nd in the queue, and the 1st person in the queue borrows the Item, you become the 1st one (The users can see their current position in the queue for each Item they have reserved when they log into the system). When that person returns the Item, you will automatically get an email saying that the Item is ready for pick up.

Note. Booking an item is not the same as lending an item. Booking an item is where you reserve it ahead of time. This can be compared to making a booking ahead of time for a hotel room. Lending is when you actually come and take the item, a bit like when you go to the hotel and pick up the key to the room and it is now in your possession.

The link will lead you to some video tutorials https://lenditems.com/how-it-works/

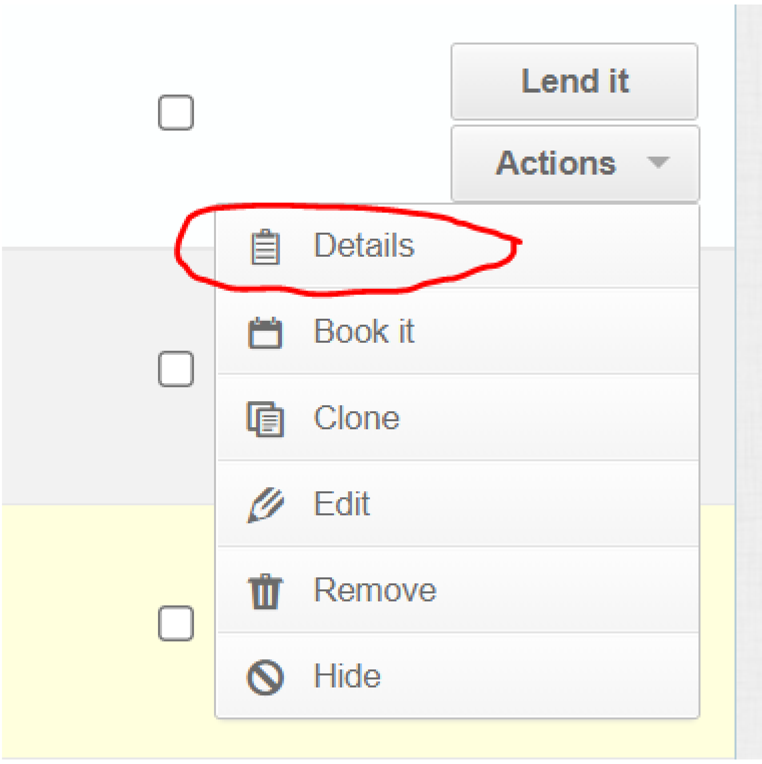
Also, our blog has some excellent articles that will have you get started here https://lenditems.com/blog/

Managing Item Queues

When users queue for an item, they are added to the end of the list of users waiting on this item. To manage and delete users who may be queued on an item, do the following;

Click on Manage Items to go to the screen for managing items in your library.

Search for the item of interest, and on the Actions drop down list, click on “Details”.



When the Item details screen appears, scroll down to the section which is titled Queue. (Note that this item must be of the Queue Reservation Type to view this).


Queue

Position	User	Operation
1	Joe Fred	Cancel
2	Ian Gray	Cancel

This will show the users currently queued on this item, and which order they are in the queue. To remove a user from the queue, click on the Cancel button.

Emailing in Lend-Items

The Lend-Items application uses email to communicate with Users and Administrators.

Overdue reminder

Item reservation email

Queue confirmation email

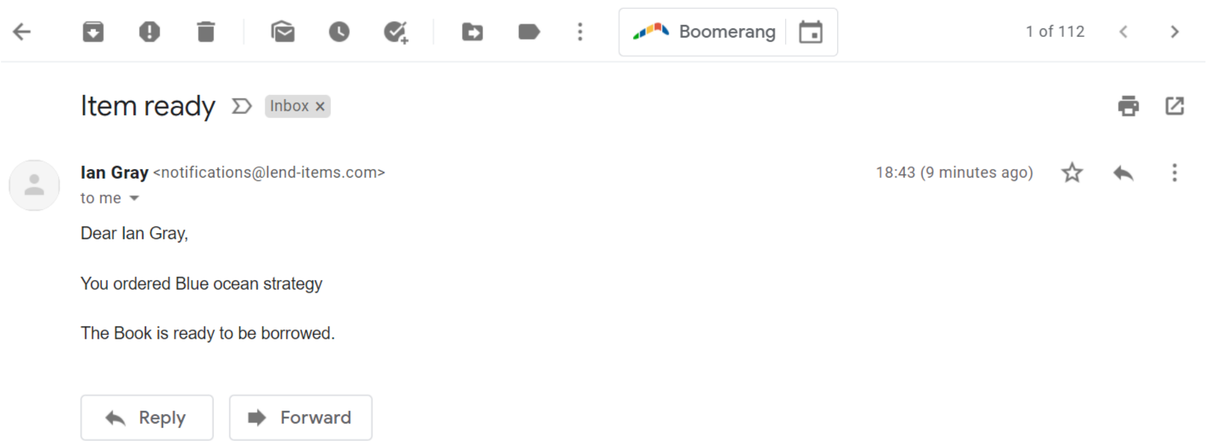
Item booking email

Item cancellation

Item return

Item ready for loan email

When a user is first in the queue of users waiting for an item and the item is returned to the library and so becomes available the user will be sent an email, like the following.

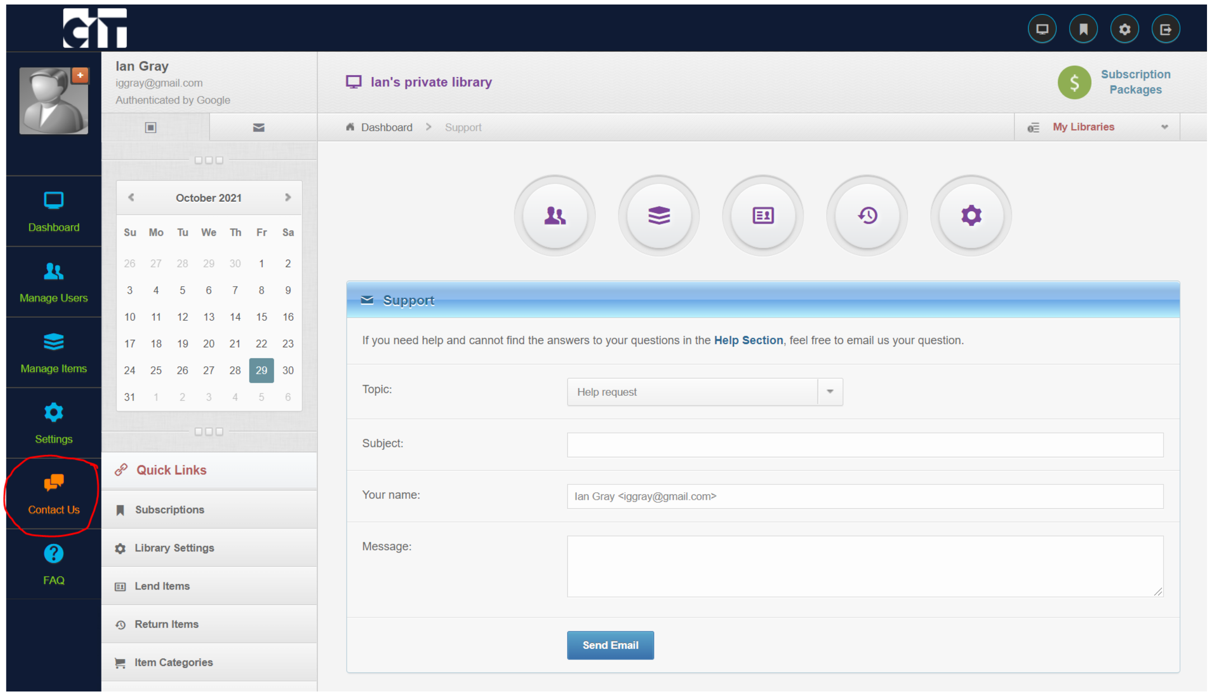


Help Requests

The Lend-Items application provides a Contact Us button, shown circled below. The action of this button depends on whether the person logged into the library is an administrator or a normal user. If the person is an administrator of the library then an email will be sent to the Lend-items support team. If the person is an ordinary user, then the email will be sent to one of the administrators of their library, depending on which one they choose when entering the Help request.

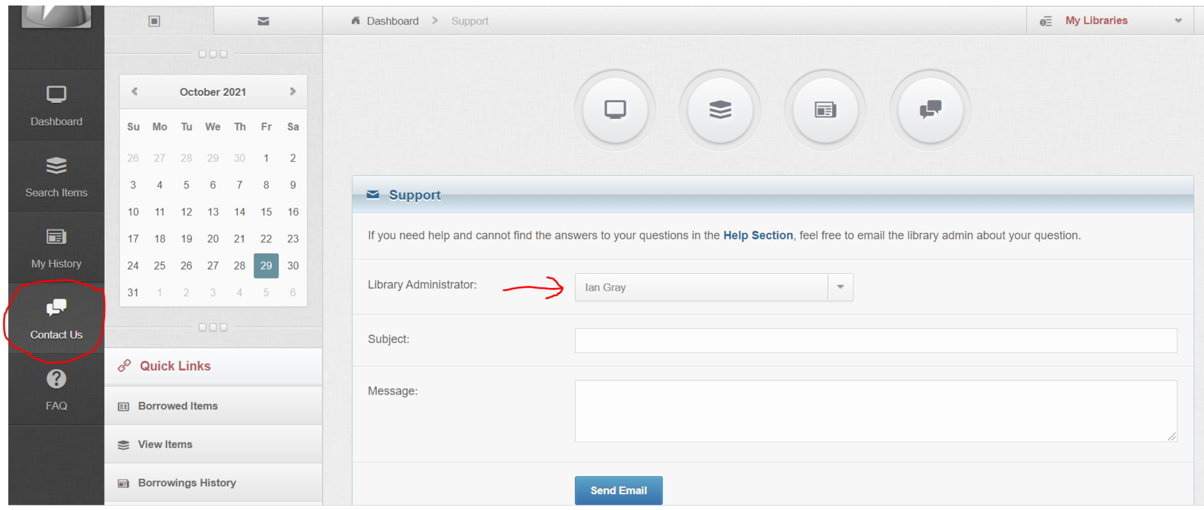
Administrator Help Requests

If an administrator of a library clicks on the Contact Us button, they will be shown a page where they can enter details about the question they have and this will be sent to the Lend-Items team. They should first select the Topic of the inquiry, enter in a Subject for the email to be sent, and then type in the message they want to send. When ready, press the Send Email button, and the email will be sent to the Lend-Items support team.



User Help Requests

If a normal user (non-administrator) of a library clicks on the Contact Us button, they will be shown a page where they can enter details about the question they have and this will be sent to an Administrator of their library. They should first select which administrator they wish the help request to be sent to as marked below by the red arrow. They should then enter in the Subject for the email to be sent, and type in the message they want to send. When ready, they should press the Send Email button, and the email will be sent to the selected Administrator of their library.



Paid Subscriptions

Lend-Items offers a number of paid subscriptions as listed here and explained below;

- Monthly subscriptions
- Yearly subscriptions
- White Label Subscription
- Customized Email Subscription

Monthly Subscriptions

This is a monthly recurring subscription, the price being based upon a combination of the number of items allowed in your library and the number of loans you can have each month. At the end of each month the number of loans allowed is reset to that number of loans appropriate for the pricing level of the chosen subscription; unused loans do not rollover.

Note. A loan consists of one lending session for one user, but where that user can borrow a number of items in that one lending session.

Yearly Subscriptions

Yearly subscriptions are the same as monthly subscriptions but are paid on a yearly basis and so enjoy a discount over the monthly subscription.

White Label Subscription

The White Label subscription is an additional premium subscription which provides additional features such as; customized look and feel, locations, Checkout sheets, User Terms of Use, announcements, late fees and customized emails.

The charge for this is an extra $30/month or $300/year.

Customized Emails

The Customized Emails subscription provides the additional feature of customized emails.

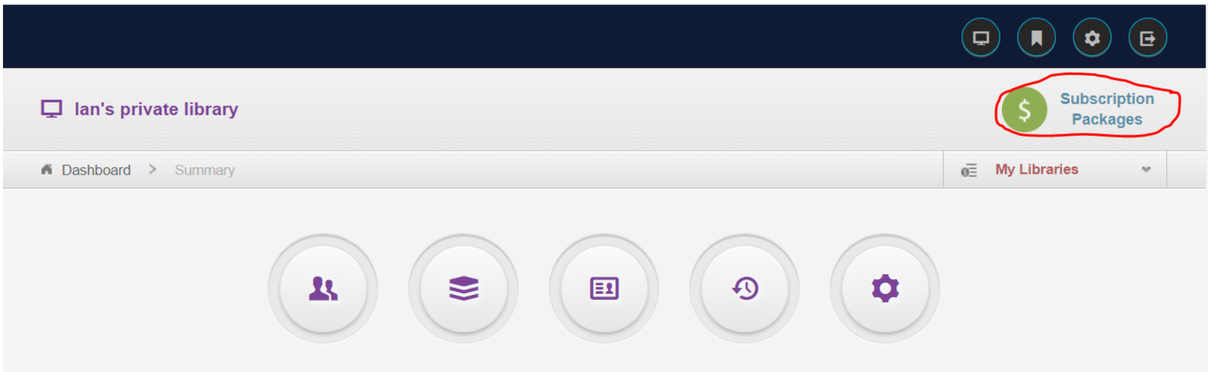
The charge for this is an extra $10/month or $100/year.

Subscribe when needed

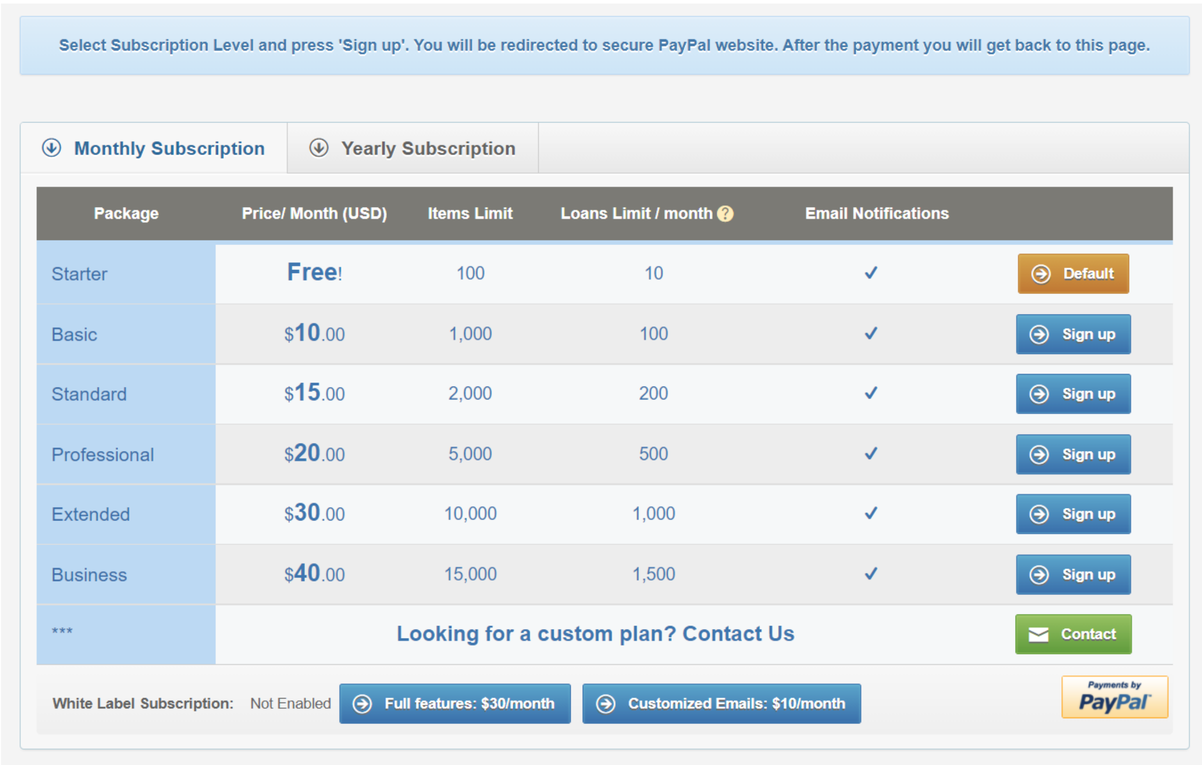
It is possible to pause your subscription from your PayPal account if you do not need to use the LendItems library during for example holiday seasons, or non busy times. The library will continue to stay ready for you to resume again when you are ready.

Subscribing to Lend-Items

To sign up to a Lend-Items subscription, first click on the Subscription Packages.



This will show the monthly and yearly subscriptions available. Click on the Yearly Subscription tab for the yearly subscriptions. Then select the desired subscription package and click on the Sign up button. You will then be directed to the secure PayPal website. After you have made the payment, you will be brought back to this page.



Upgrading a Subscription

To upgrade to a higher subscription (or downgrade to a lower subscription), simply go to the subscription page as shown above and subscribe to the new subscription. However, remember to login to your Paypal account to cancel the recurring payment for the subscription you were previously on.

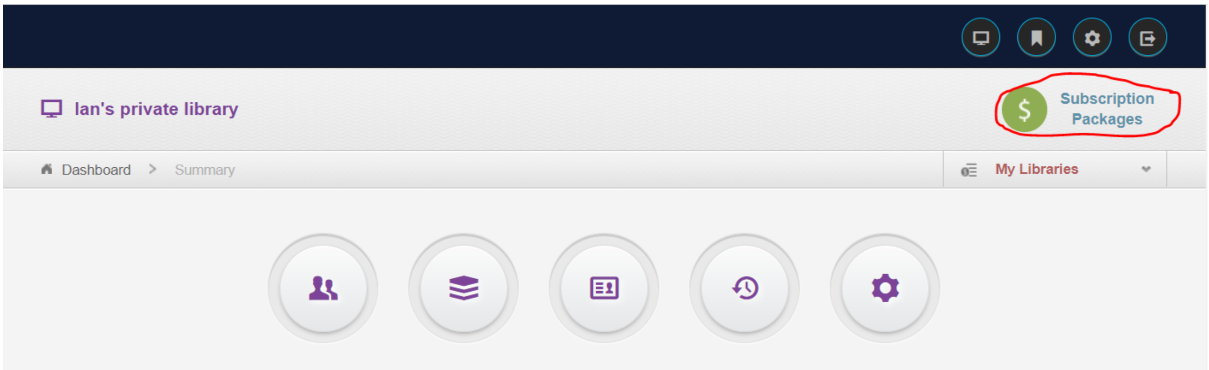
Canceling a Subscription

To cancel your subscription, simply log into your PayPal account and cancel the recurring payment.

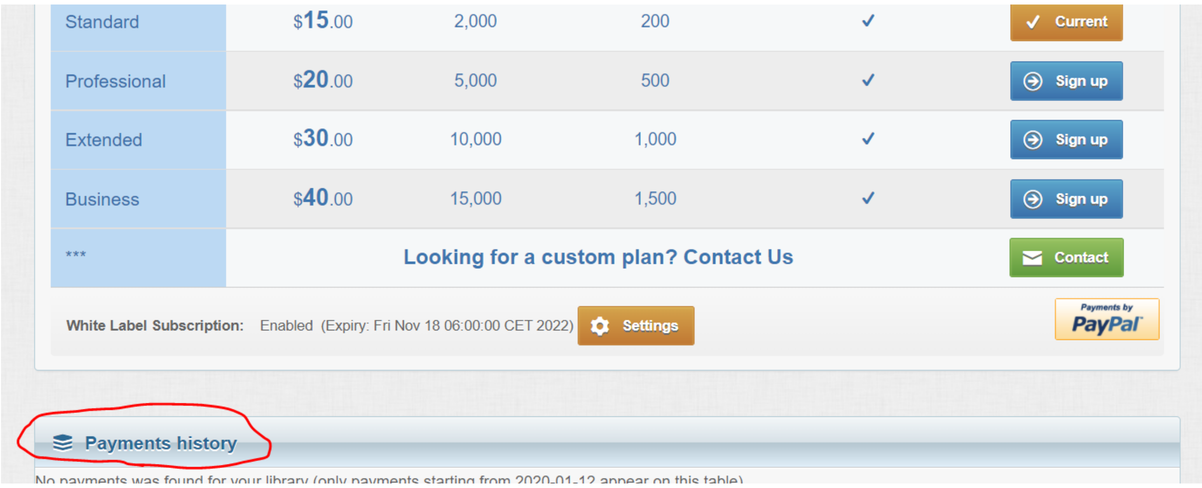
Invoices

Monthly invoices associated with the monthly and yearly subscriptions can be downloaded from the Lend-Items application.

To view and download invoices, first click on the Subscription Packages.



Then scroll down to the section marked Payments History.



From here you can view and download the invoices.

Alternatives to PayPal Subscriptions

We can issue an invoice for any yearly subscription, which may include a purchase order number if one is provided. This invoice will be a PayPal invoice, and can be paid in various ways; through a PayPal account, with any debit or credit card, or by bank transfer.

We do not issue invoices for monthly payments.

Ways of paying

If you already have a PayPal account, or you choose to create a PayPal account, then the invoice can be paid through your PayPal account.

If you do not wish to use a paypal account, usually no PayPal account is required and you can pay by credit card without registering a PayPal account. However, we have noticed in some countries you will have to still set up a PayPal account to make the payment. However, the payment can still be made through your debit or credit card, and you can delete the PayPal account after the payment has been made.

Another alternative is to pay the invoice via a bank transfer. The invoice includes the bank details if you choose to make the payment in this way. However, bear in mind that you will need to cover all bank charges required to make the transfer which can range from as little as $1.23 (in the Netherlands) to $25 (in the USA). Please ensure that you instruct your bank that the full amount of the payment needs to be received into the Lend-Items bank account.

White Label Subscription

We have a white label version of Lend-Items which includes the following features:

- Customized library interface with your company/ business or institute logo
- Customized look and feel according to company's/ institute's website or any preferred color scheme
- Location based items - You can manage your items according to your different library locations
- Provision to print checkout sheet with custom template and item details before lending items
- Optional Terms of Use page to display and ask for acknowledgement on terms before booking or queuing an item
- Announcements which can be presented when logging into the library.
- Late fees that can be applied for late returns of items.
- Custom support email recipients - You choose who receives help emails sent by library users
- Custom reply-to address for auto generated reminder emails
- Custom templates for emails that includes custom title, contents and signatures of
    - Overdue reminder
    - Item reservation email
    - Queue confirmation email
    - Item booking email
    - Item cancellation
    - Item return
    - Item ready for loan email
    - and many more…

The charge for this is an extra $30/month or $300/year.

White Label Features

The White Label Subscription enables the following features.

White Label look and feel

The look and feel of the Lend-Items application can be adjusted to a look and feel of your choice, for example to make it look similar to your own website in terms of colors, logos, etc.

This is achieved through a custom Cascading Style Sheet (CSS) unique for your library.

There are two ways your custom CSS can be configured;

- User Configured CSS
- CSS Configured by LendItems Support Staff

If you are comfortable with editing html CSS files then the advantage of the first approach is that you can get immediate feedback on the changes that you are doing.

However, if this is unfamiliar territory for you, then you may want to ask LendItems staff to make the adjustments needed, but bear in mind that this can have a few days for effect.

The following two sections describe each of these two approaches.

User Configured CSS

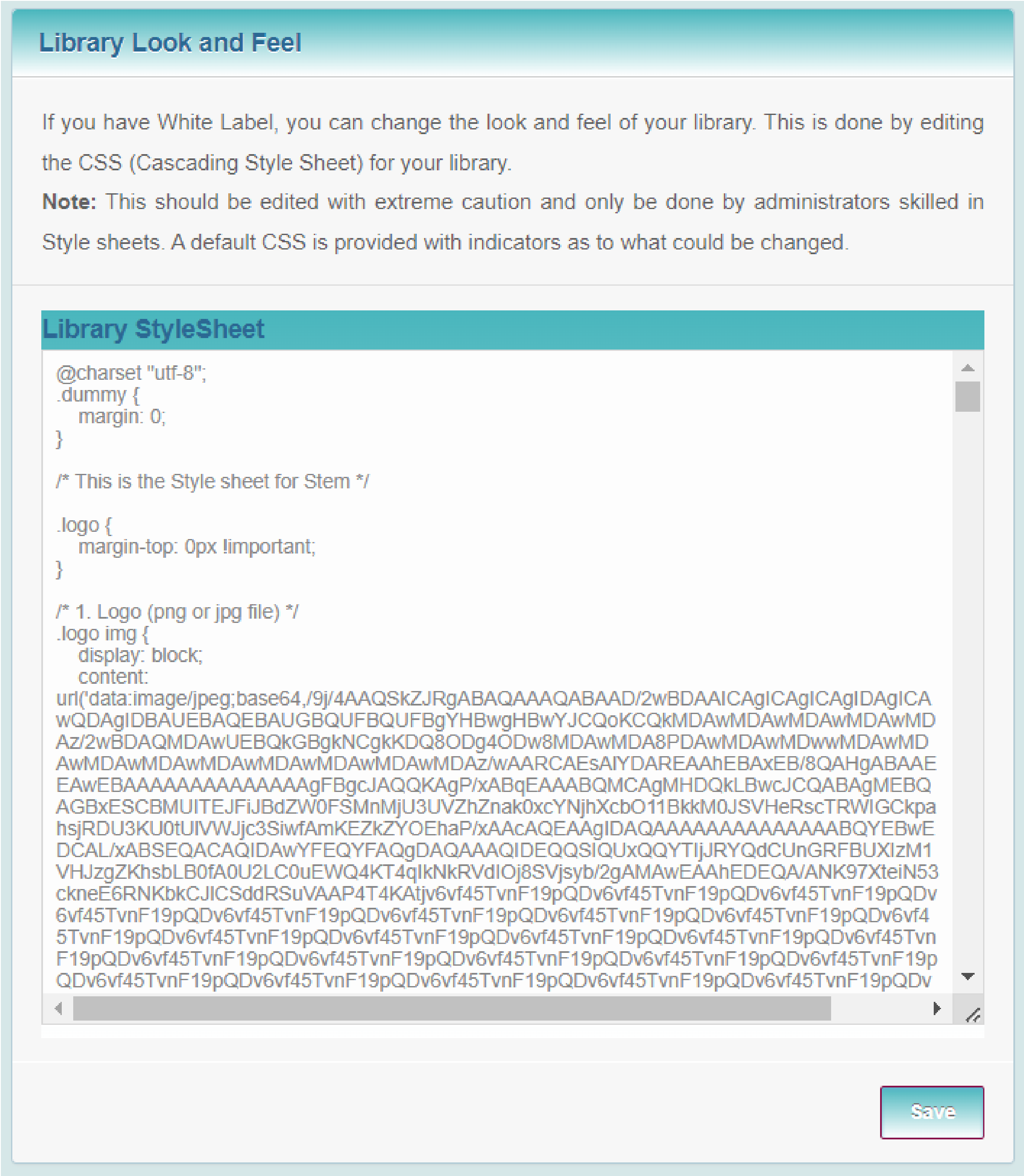
Your LendItems custom white label CSS can be uploaded and edited by going to the Settings menu and scrolling down to the section marked LendItems Look and Feel.

Here you will find a text field labeled Library Style Sheet which can be edited to meet your desired requirements.

Initially after subscribing to the White Label subscription, this text field will be loaded with the base CSS, which contains some comments and guidance as to features which can be adjusted in the Style Sheet.

To gain some insight as to which parts of the Style Sheet relate to which parts of the LendItems GUI, review the the section “CSS Configured by LendItems Support Staff” which shows an image of the LendItems GUI with numbers annotated on it which can be referenced to in the initial base CSS provided.

The section on Library Look and Feel can be found at the bottom of the Settings screen in LendItems as shown here.



Images

Currently, image files are incorporated directly into the style sheet using Base64 encoding.

In any places in your Stylesheet where you would like to insert an image, instead of doing;

background-image: url(images/myimage.jpg)

Include the image in the URL using Base64 encoding, so more like;

background-image: url('data:image/png;base64,iVBORw0KGgoA………lFTkSuQmCC')

There are many online websites for converting images to Base64 encoded text. Here are some examples;

https://www.base64-image.de/

https://base64.guru/converter/encode/image/jpg

https://codebeautify.org/jpg-to-base64-converter

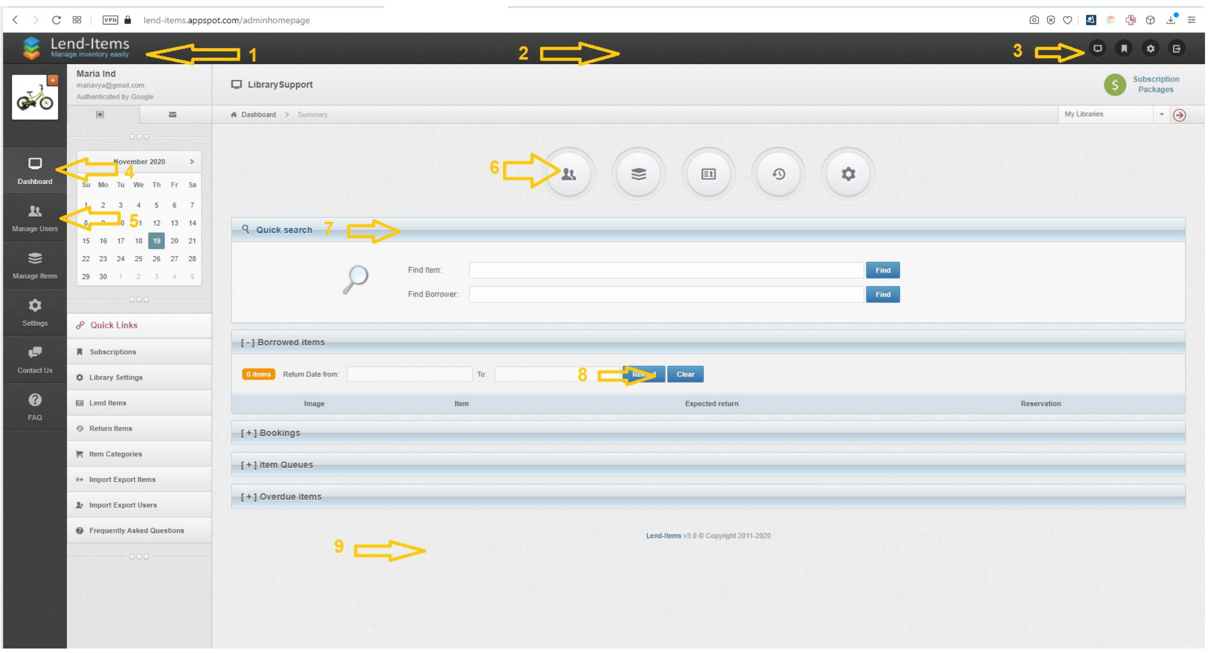
Colors must be specified in hexadecimal color code e.g. #35BCB2. See below for details.

CSS Configured by LendItems Support Staff

To adjust the look and feel of the LendItems web application the following information needs to be provided to support@lenditems.com

1. Logo (png or jpg file)
2. Header - 1 color (now dark grey)
3. Icons symbols color (now light grey)
4. Selected page symbol color (now white)
5. Unselected pages symbol color (now light grey)
6. Menu symbols color (now medium grey)
7. Extendable panels gradients - 2 colors (now light blue and white)
8. Buttons gradient colors - 2 colors (now blue and light blue)
9. Background color (now grey)

Please see the image below which shows for each of the above items where these are located on a typical screen.



Specifying Colors

The colors should preferably be provided in hexadecimal color code for example #35BCB2.

Hexadecimal or hex color code format is a way to represent colors using a combination of hexadecimal digits. Hex color codes provide a convenient and concise way to specify colors, and they are widely used in HTML and CSS for defining colors in web development.

In a hex color code:

- The "#" symbol is followed by a combination of six hexadecimal digits (0-9 and A-F), arranged in three pairs.
- The first two digits represent the red component, the next two represent the green component, and the final two represent the blue component of the color.

Once the logo and colors have been provided through support@lenditems.com LendItems support staff can implement the new look and feel for the library.

Discovering Hex Color Codes

Style Sheets use hex color codes to define the colors of elements as described above.

To find out the color of elements in an existing website there are many tools available;

http://colorcop.net
https://imagecolorpicker.com/

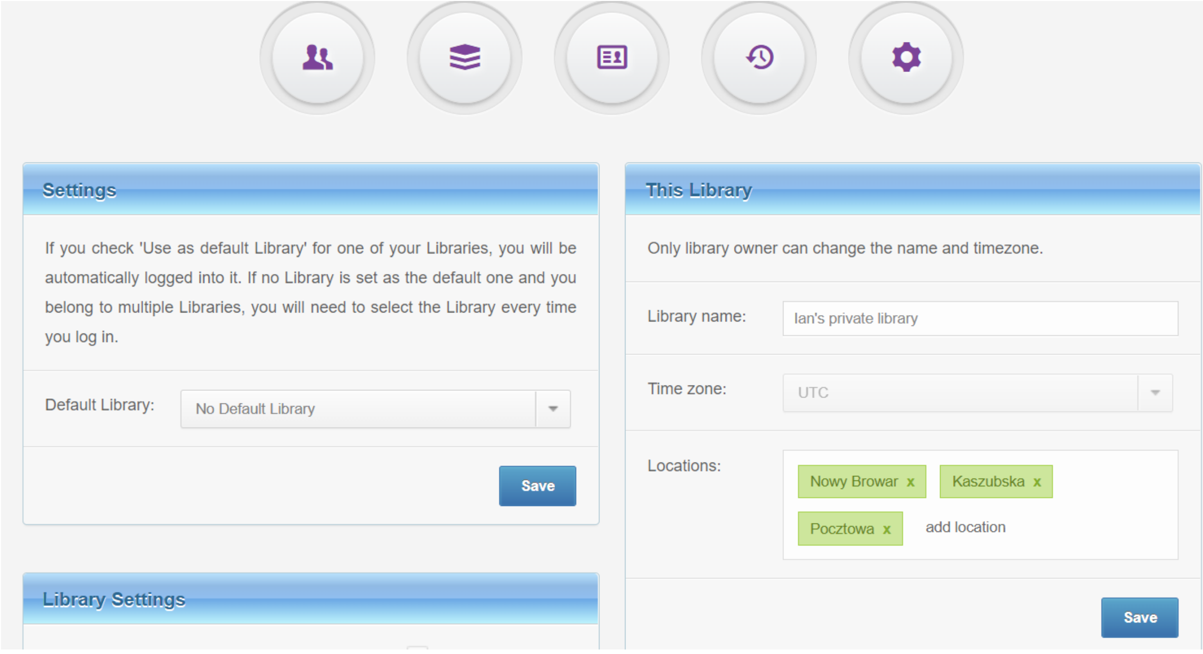
There are also color picker extensions for Chrome browsers such as;

- Color Picker from Chrome
- Eye Dropper

Location Based Items

The White Label subscription brings to Lend-Items libraries the ability to have different locations where Items might be stored.

To assign the list of locations, go to the Settings page, to the “This Library” section and in the “Locations” field, click on “add location” and enter the name of the location you wish to add.



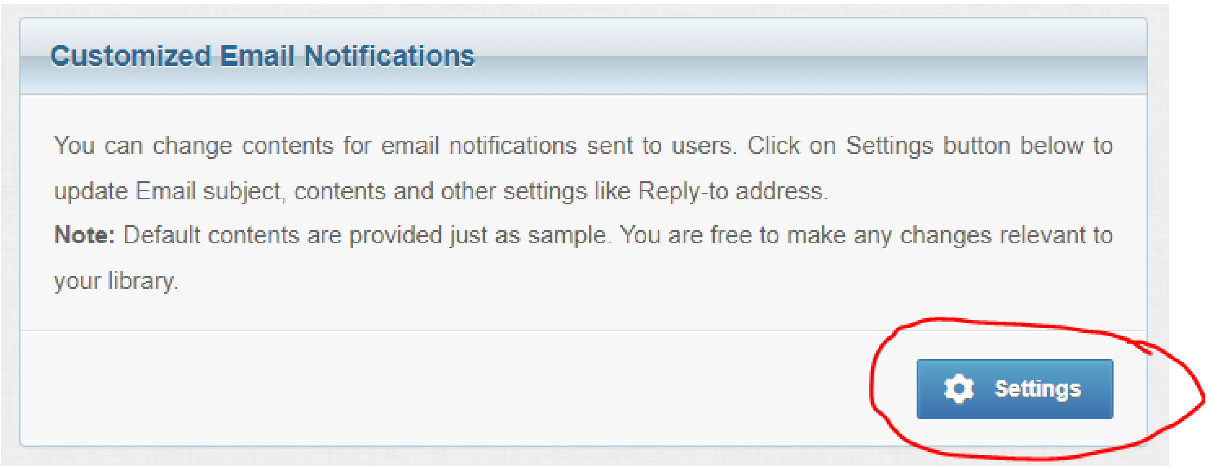
To delete a location simply click on the x mark of the location you want to delete.

Checkout Sheet

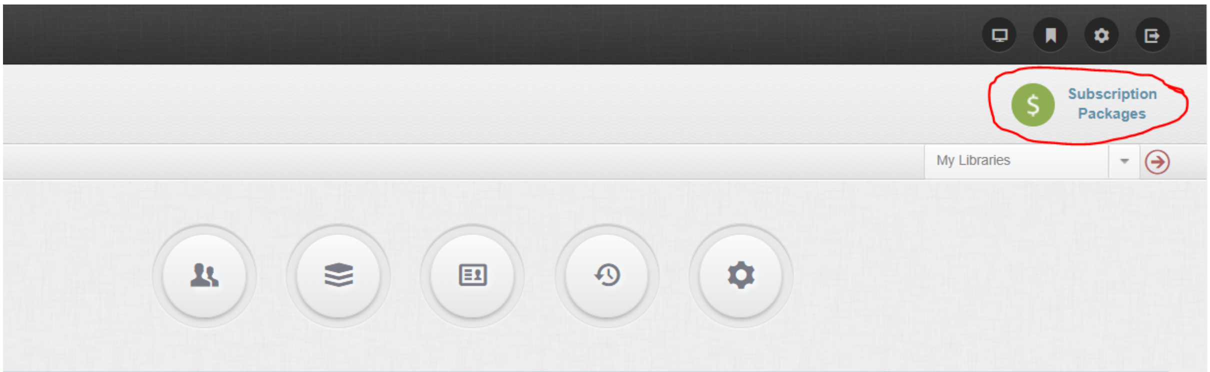
With the White Label Subscription a customized checkout sheet can be created which is displayed at the point of borrowing items. This checkout sheet can be printed out and optionally be signed before lending out the items.

To create or modify the checkout sheet, there are two ways to get to these settings.

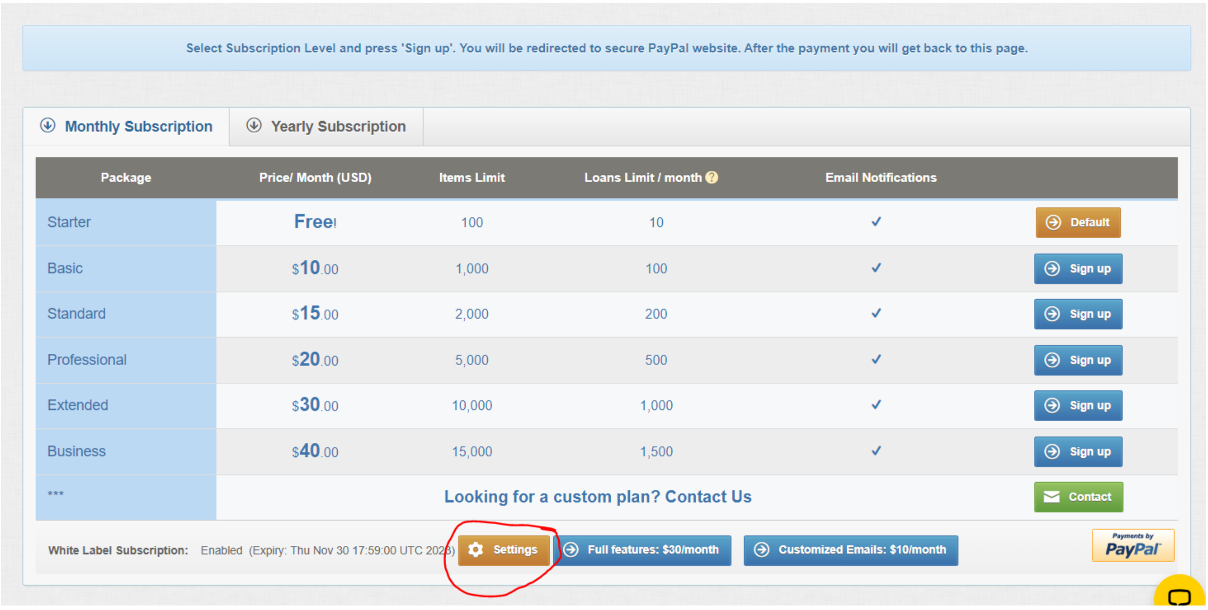
Go to the Settings page, head to the “Customized Email Notifications” section and click on the Settings button as shown here.



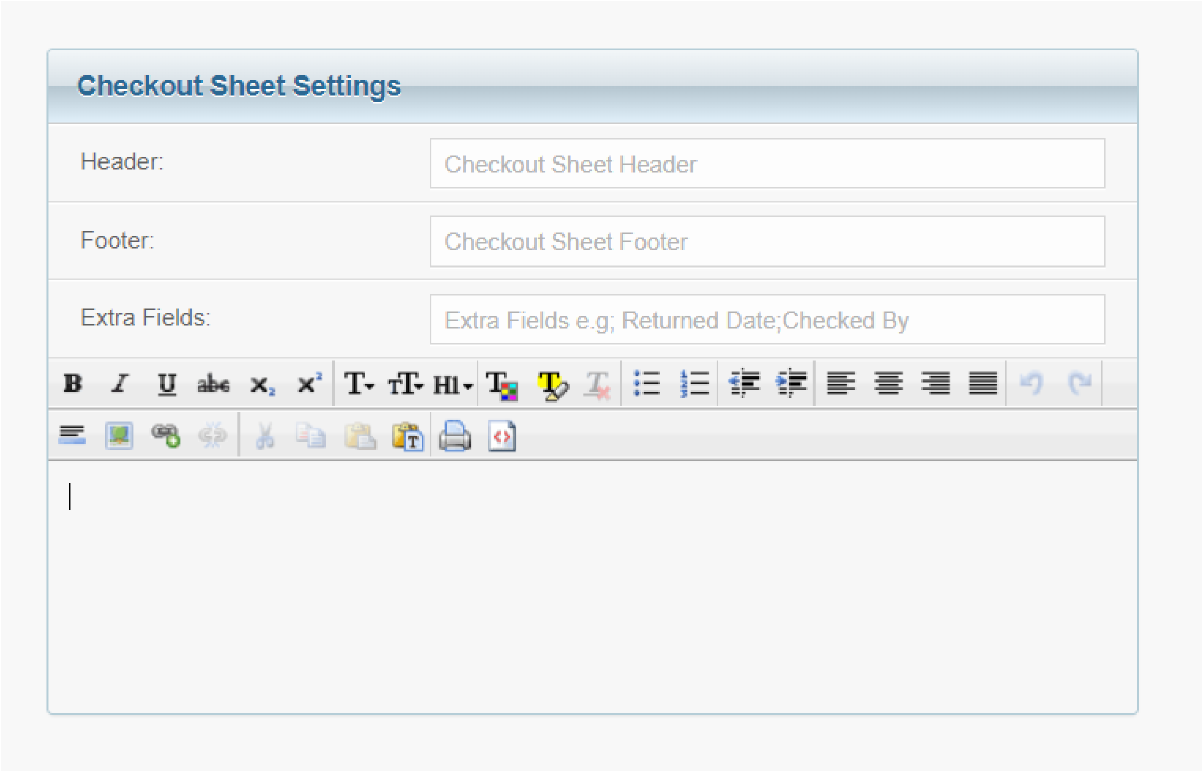
Alternatively go to the Subscriptions Packages page by clicking on the Subscriptions Packages link on the top right hand corner of LendItems.



Then in the Subscriptions Packages page, just below the table of Monthly and Yearly Subscriptions, click on the orange Settings button, next to the White Label Subscription description. (The Settings button will only be enabled if this library has a current White Label or Customized Emails subscription active).



No matter which path you choose to get to these settings, you will find at the bottom of this screen the Checkout Sheet Settings section.



There are four fields which can be customized for your needs.

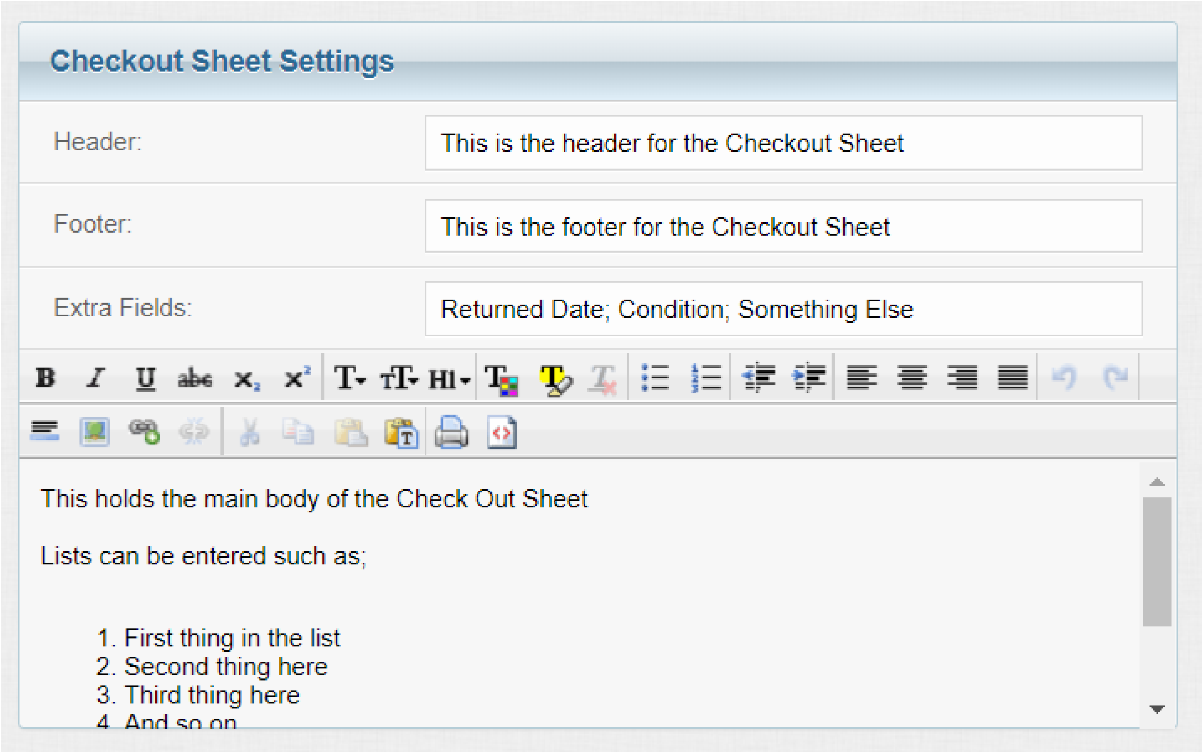
Header: This will be printed at the top of the Checkout Sheet

Footer: This will be printed out at the bottom of Checkout Sheet

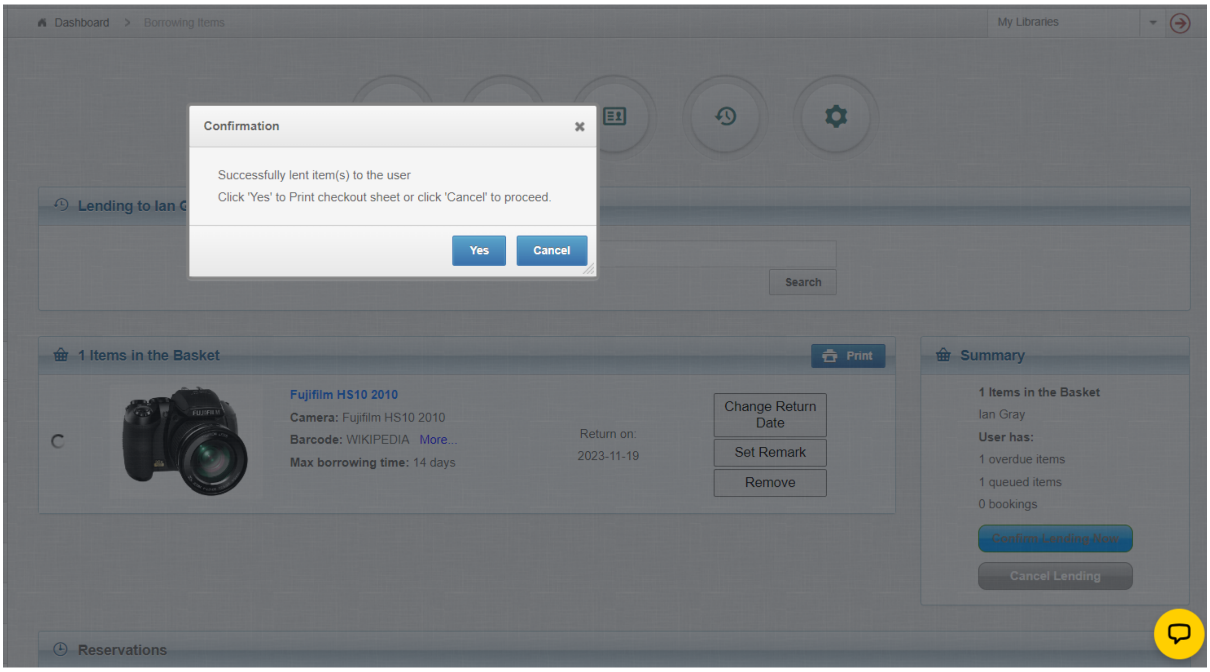
Extra Fields: This is a list of extra fields (separated by semicolons in this field) that you want presented on the Checkout Sheet to be filled out after the sheet has been printed out.

Main Content: This is the message that will be printed out in the body of the Checkout Sheet.

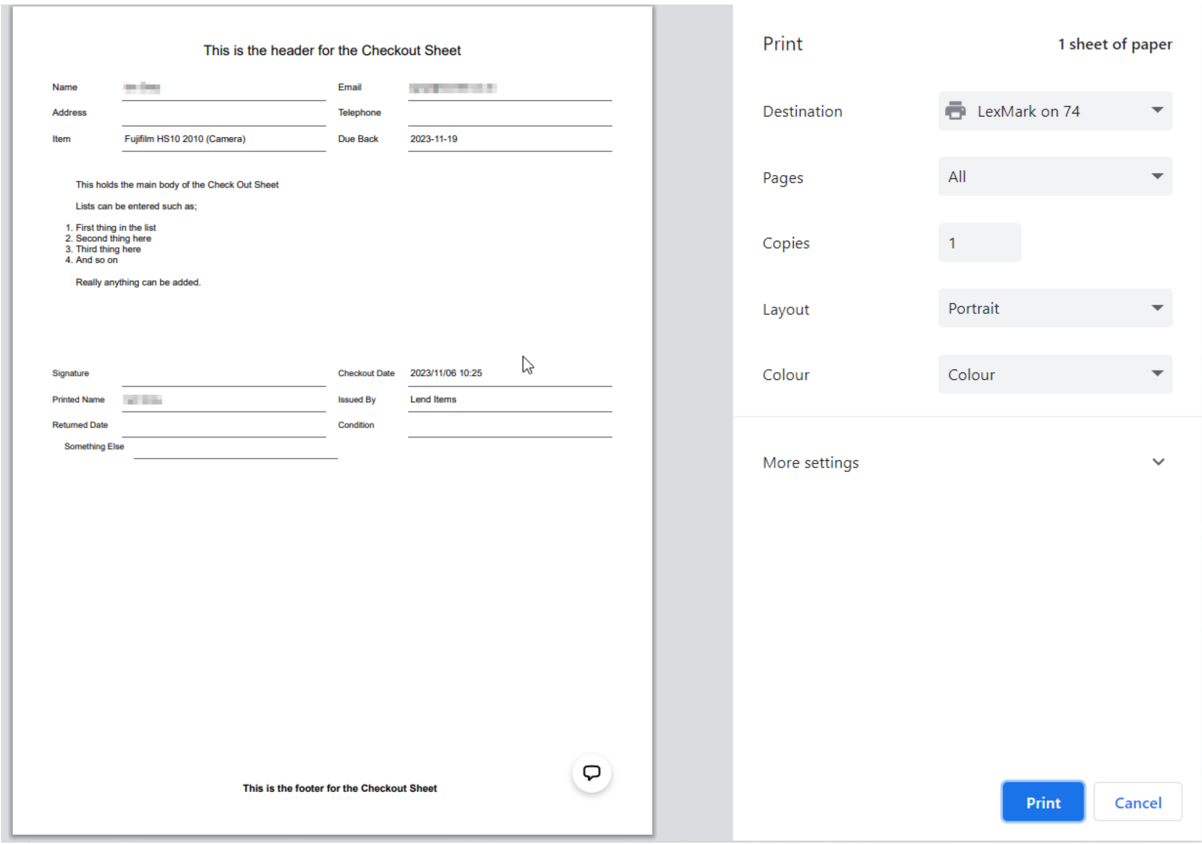
Text can be entered into these fields to get the desired effect for when printing out the Checkout Sheet. The Main Content fields allows for coloring the text, choosing size of font, creating lists and many other features as shown in the following example.



Then, when lending some items to a User at the point of Confirming the lending session, the administrator will be presented with a dialogue asking if they want to print out the Checkout Sheet. Click on Yes to print out the Checkout Sheet or Cancel to skip doing this.



If the administrator clicks on Yes to printing the Checkout Sheet then a print dialog will open giving the opportunity to select the printer, set up various options and print out the Checkout Sheet as shown here.

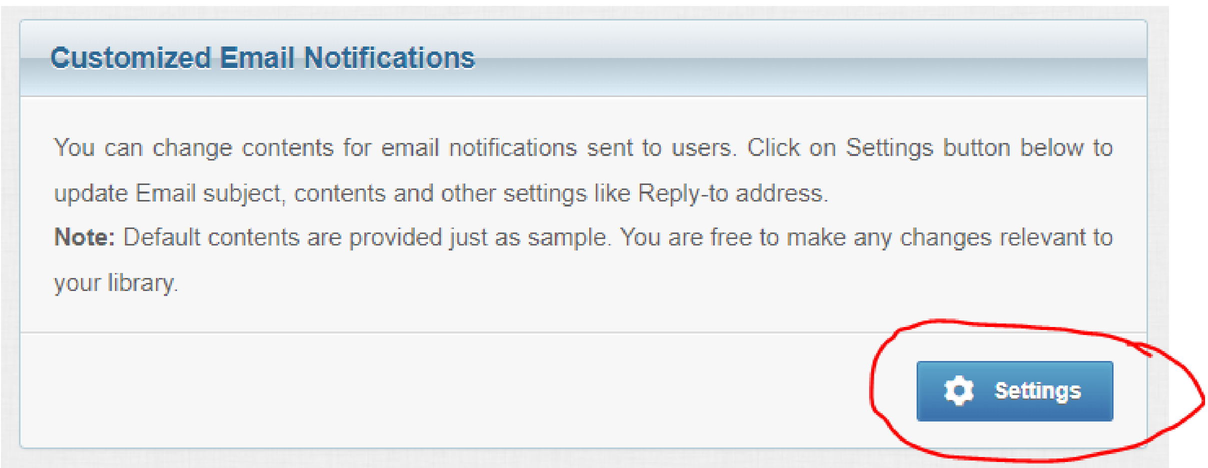


Terms of Use

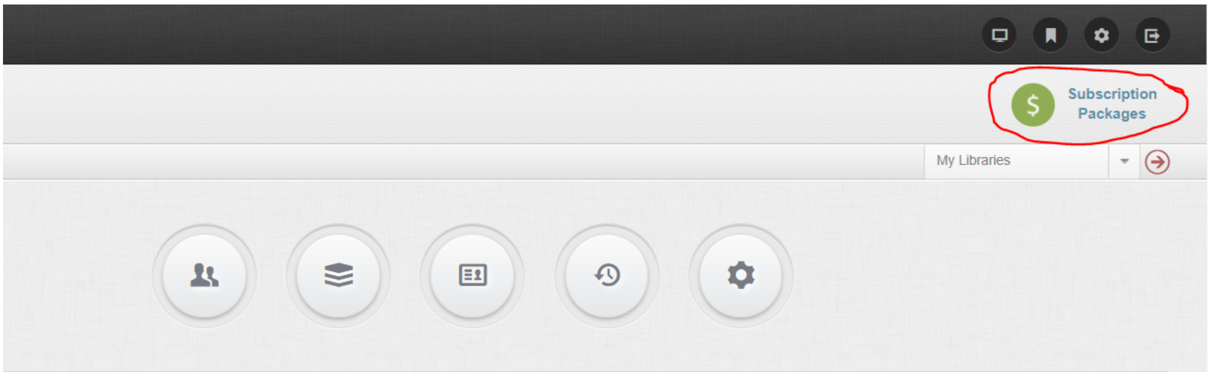
With the White Label Subscription a customized User Terms of Use can be created which is displayed at the point of making a booking for an item or when queuing on an item. The User Terms of Use has an associated "I Agree" checkbox which must be ticked by the user before they can book or queue on the selected item.

To create or modify the User Terms of Use, there are two ways to get to these settings.

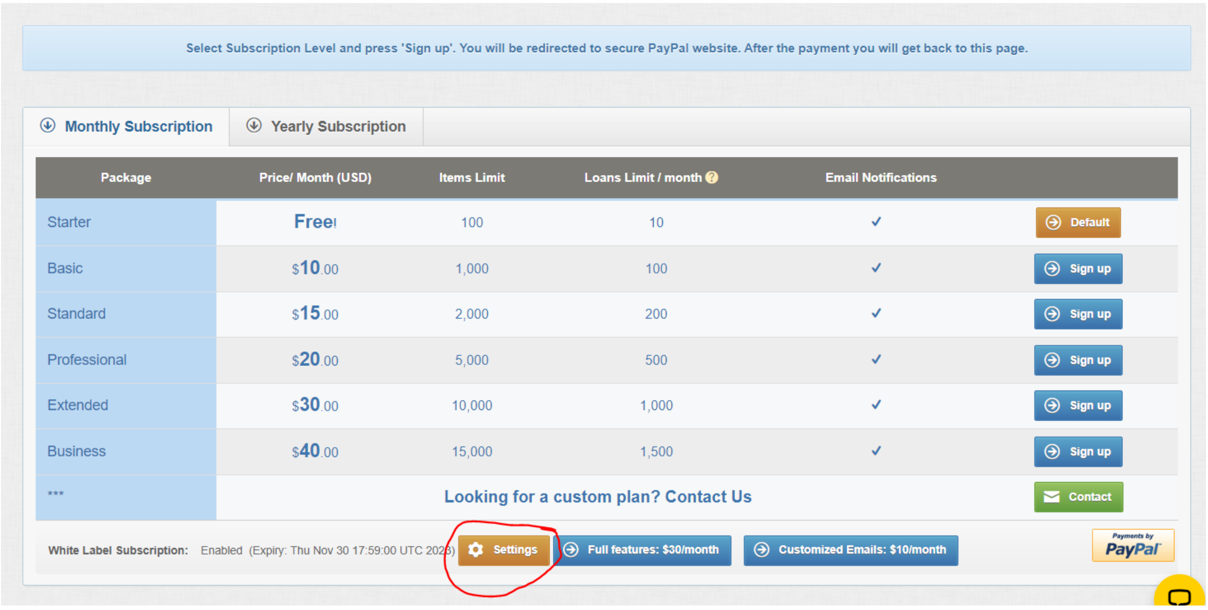
Go to the Settings page, head to the "Customized Email Notifications" section and click on the Settings button as shown here.



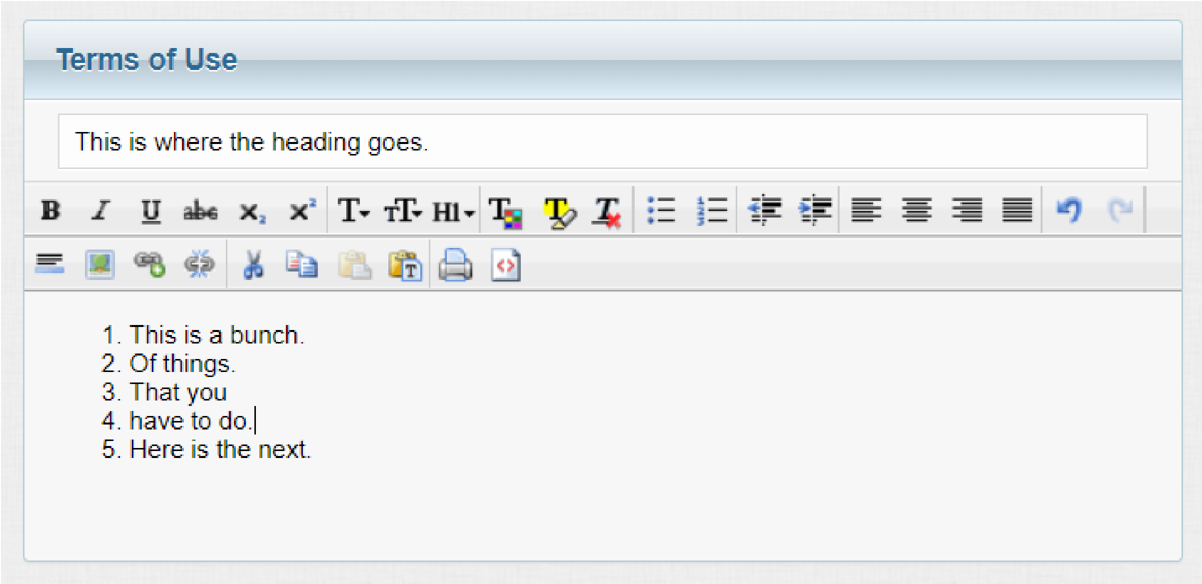
Alternatively go to the Subscriptions Packages page by clicking on the Subscriptions Packages link on the top right hand corner of LendItems.



Then in the Subscriptions Packages page, just below the table of Monthly and Yearly Subscriptions, click on the orange Settings button, next to the White Label Subscription description. (The Settings button will only be enabled if this library has a current White Label or Customized Emails subscription active).



No matter which path you choose to get to these settings, you will find at the bottom of this screen the User Terms of Use section.

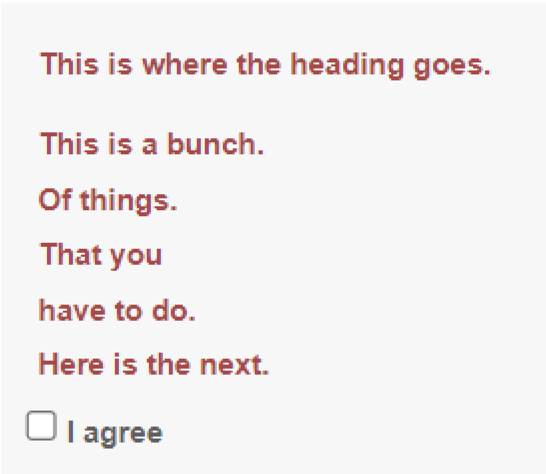


There are two fields which can be customized for your needs.

Header: This will be printed at the top of the Terms of Use.

Main Content: This is the Terms of Use that will be presented to the user.

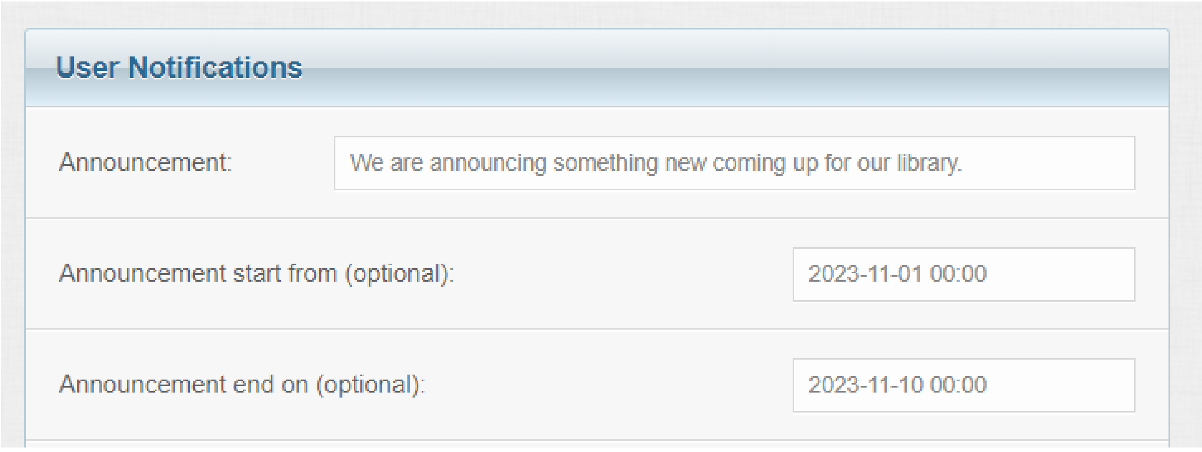
Then, when a User goes to book an item or queue on an item the Terms of Use will be presented to the User where they must agree by ticking the “I agree” checkbox in order to book or queue on the Item as shown here.



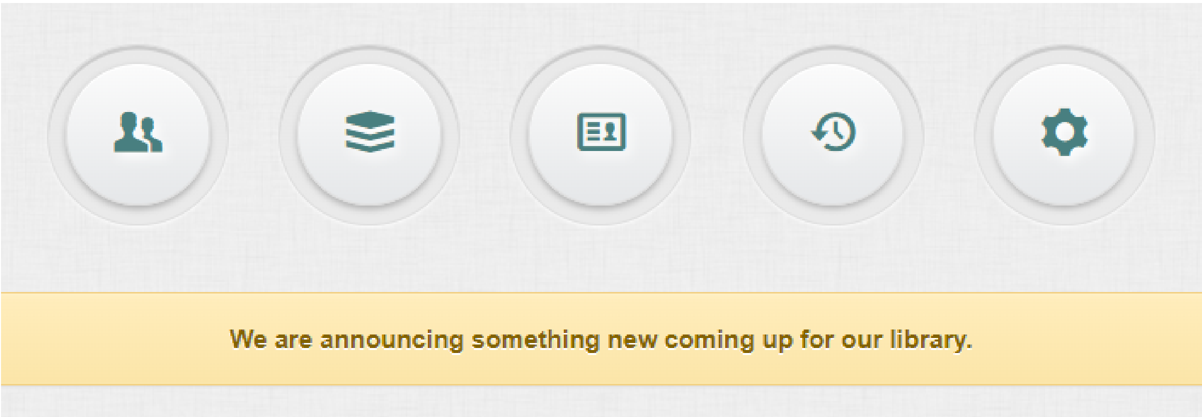
Announcements

The White Label subscription allows the administrator of a library to present announcements to its users with the option of specifying the start and end dates of when the announcement will be shown.

To set the announcement and specify the optional start and end dates of when this announcement will be shown, go to the Settings page, head to the “User Notifications” section and at the top of this section enter in the announcement and the optional start and end dates as shown here.



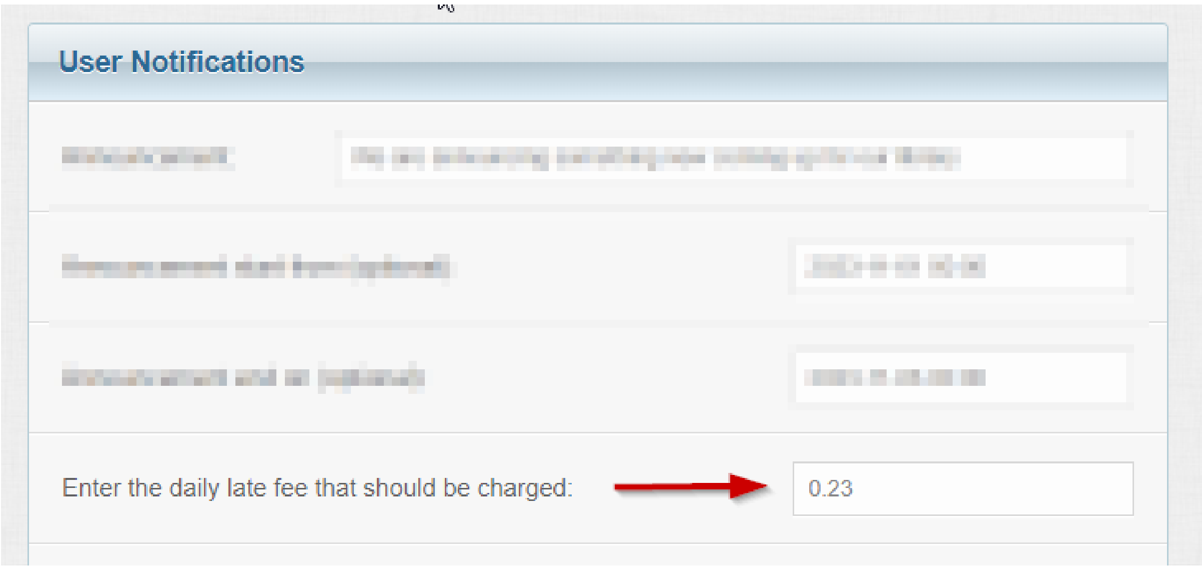
Then when users and administrators log into the library they will see this announcement on the main screen optionally during the period specified by the start and end dates.



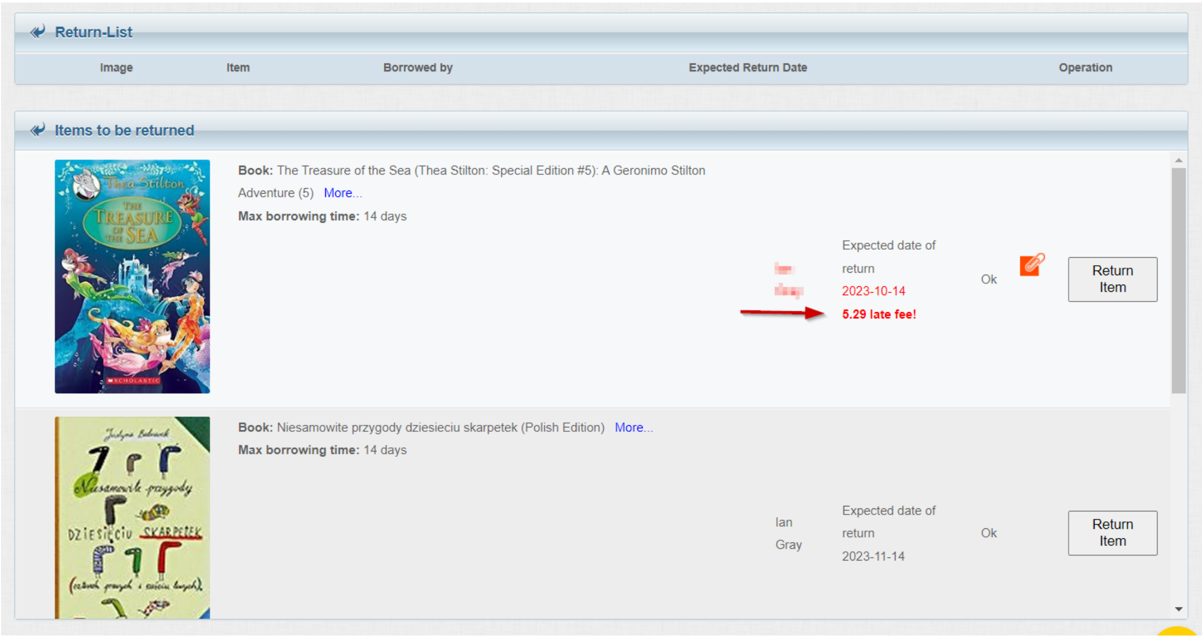
Late Return Fines

Sometimes a Library will wish to charge users late fees when items are overdue and have not been returned when they should have been. The White Label subscription allows the administrator of a library to set the daily fee that should be applied when users return items later than the expected date.

To set the daily rate for fees on overdue items, go to the Settings page, head to the “User Notifications” section and in this section enter in the daily late fee that should be applied.



Then when a user returns an item that is late the appropriate late fee will be shown on the LendItems Return Items screen as shown below.



Customized Emails Features

We have a Customized Emails version of Lend-Items which includes the following features:

- Custom support email recipients - You choose who receives help emails sent by library users
- Custom reply-to name and email address for auto generated reminder emails
- Custom templates for emails that includes custom title, contents and signatures of
  - Overdue reminder
  - Item reservation email

- Queue confirmation email
- Item booking email
- Item cancellation
- Item return
- Item ready for loan email

The following is the full list of fields that can be edited to customize emails sent out by LendItems.

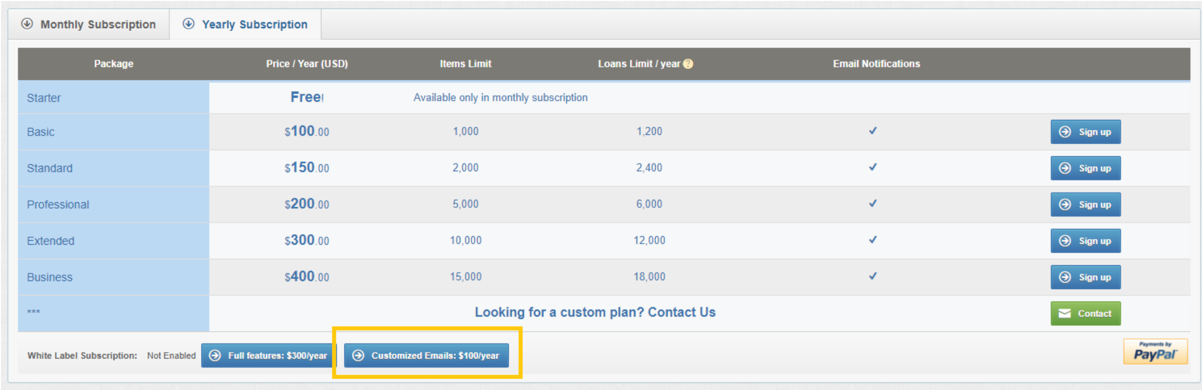
1. ReplyTo Name
2. ReplyTo Email
3. Recipient Name Format
4. Date Format
5. Library Invitation Email
6. Item's Return Reminder Email
7. ItemOverdue Email
8. Item Renewal Email
9. Item Borrowed Email
10. Item Return Email
11. Item Ready to Borrow Email
12. Item Unavailable Email
13. Booking Cancelled Email
14. Queue Confirmation Email
15. Queue Confirmation Email (First in Queue)
16. Booking Confirmation Email
17. Booking Cancelled (Unavailability) Email

If you find after using them, they are not what you need, then you can cancel the Customized Emails subscription at any time.

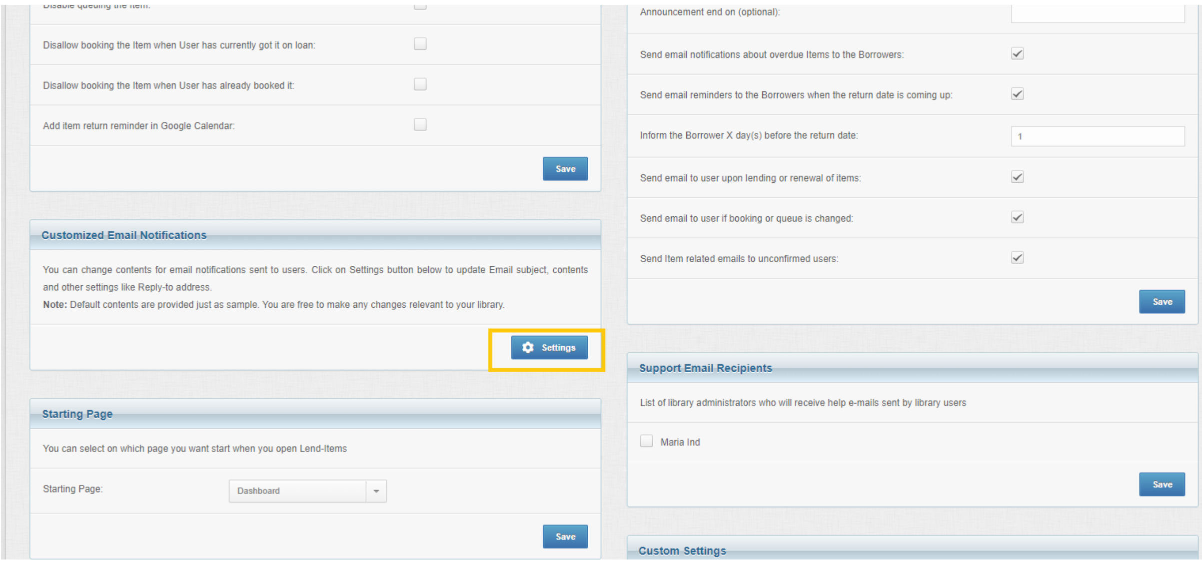
Customized Emails Described

Customized emails allow you to change the text and appearance of the automatic emails which are sent to your users upon borrowing confirmation or return reminders. So you can include text like "By borrowing the items from this library you automatically agree to the following terms: 1... 2... 3.... "

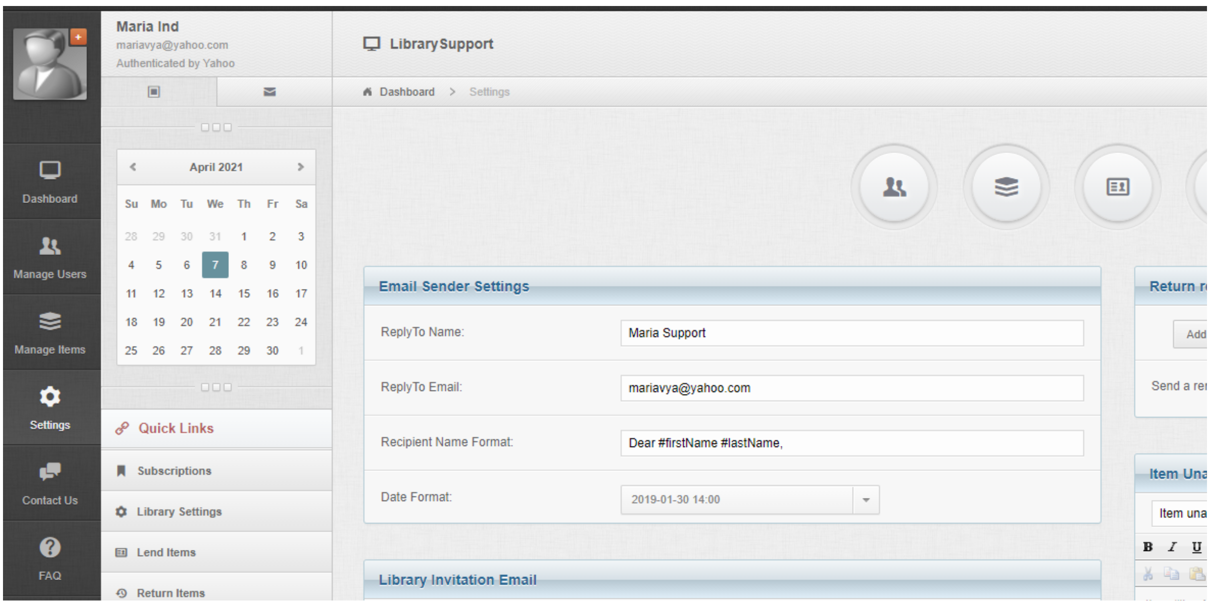
The Customized feature option can be found at the bottom of the subscription page:



To manage your customized emails, click on settings in the Customized Email Notifications settings on the library settings page as shown here.



This will bring up the Customized Emails settings as shown below.



Changing the From Address in Email Notifications

Normally the email notifications are shown as coming from the library owner. However, if you have a White Label or Customized emails subscription, you can select from From address for your emails to users.

Changing Recipient Name and Date Format

The salutation and names to include when addressing recipients, can be adjusted in the “Recipient Name Format” field.

The Date Format can be adjusted in the Date Format field by selecting from the dropdown list.

Note. For users without White label or Customized emails it is still possible to change the From address in your email notifications. To do this requires a change in the ownership of the library to another user which must be an administrator. Then emails will be signed by the name of that user. To change any global settings of the library that user would need to login.

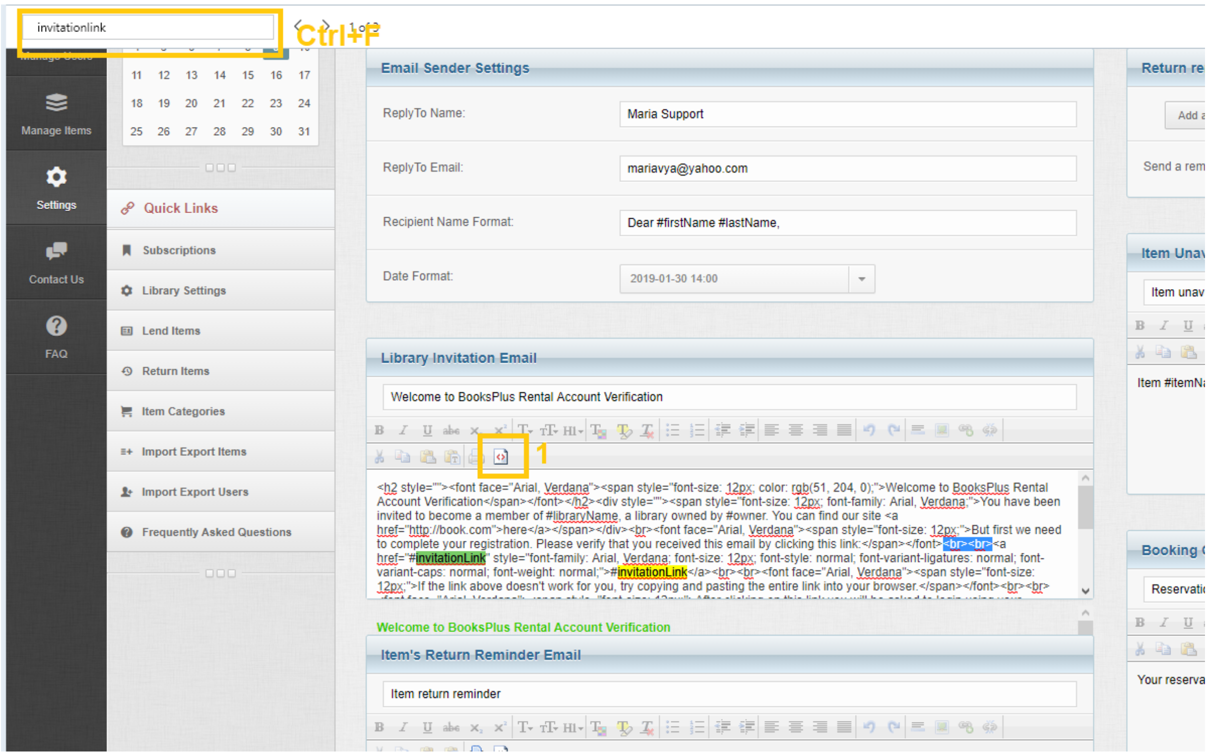
Changing the content of an email

The subject and content of various emails can be changed.

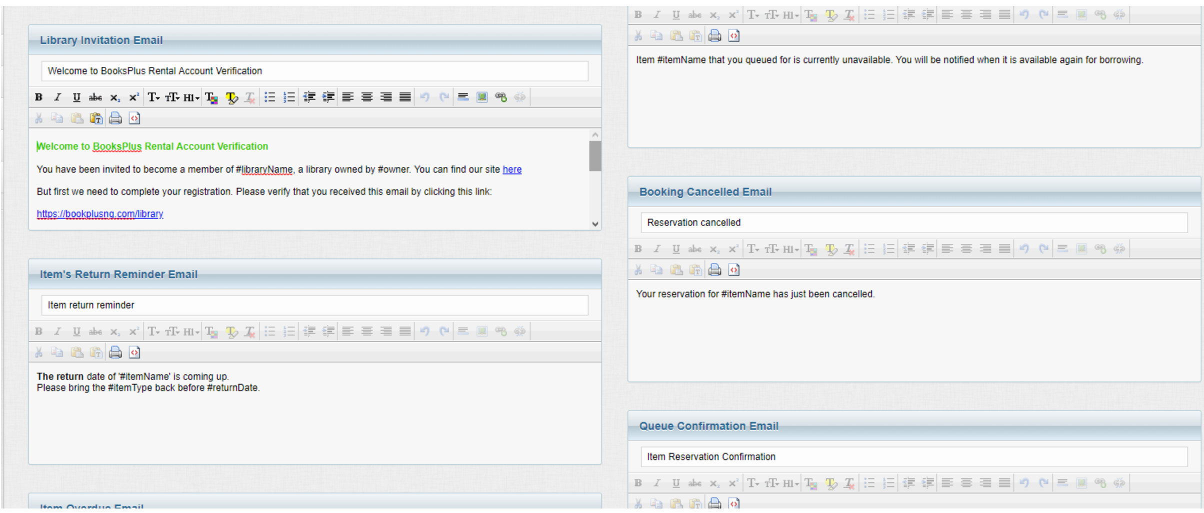
You can't change the link, because our system runs on lend-items.appspot, but you can hide it inside a <a> tag.
For that please go to the Customized emails settings page, switch to source code (button 1 on the picture), find text "Invitation link" and substitute link with the HTML code between

 and

:



The text was: #invitationLink
The new text: https://bookplusng.com/library



Press the "Save" button on the bottom right corner of the page at the end.

String Substitution

When creating a Checkout Sheet or configuring custom emails, it is possible to put place holders in the subjects and body text which will be replaced by the real value at the time of the sheet or email being produced.

So for example, the body of the email could say;

Dear #firstName,
This is to let you know that #itemName is ready for you.

At the time of showing the Checkout Sheet or sending the custom email, this might for example be converted to;

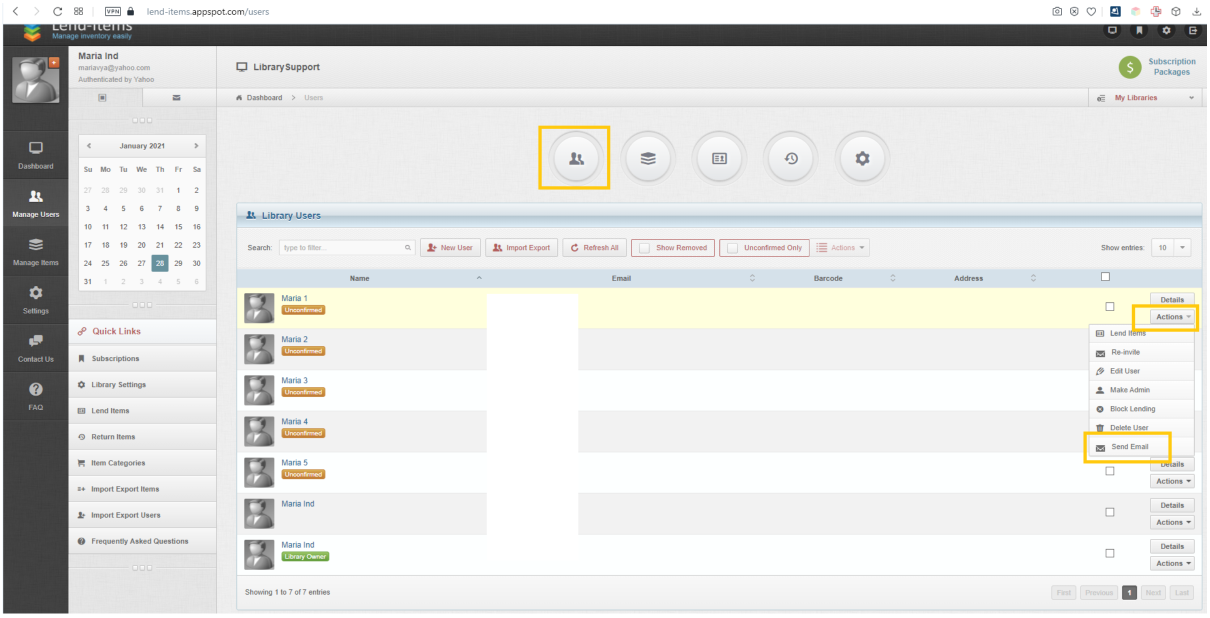
Dear John,
This is to let you know that Wind in the Willows is ready for you.

The following place holders are available.

“#firstName"
"#lastName"
"#itemName"
"#remarks"
"#itemType"
"#barcode"
"#borrowingDate"
"#returnDate"
"#queuePosition"
"#itemReady"

Sending an Email to a User

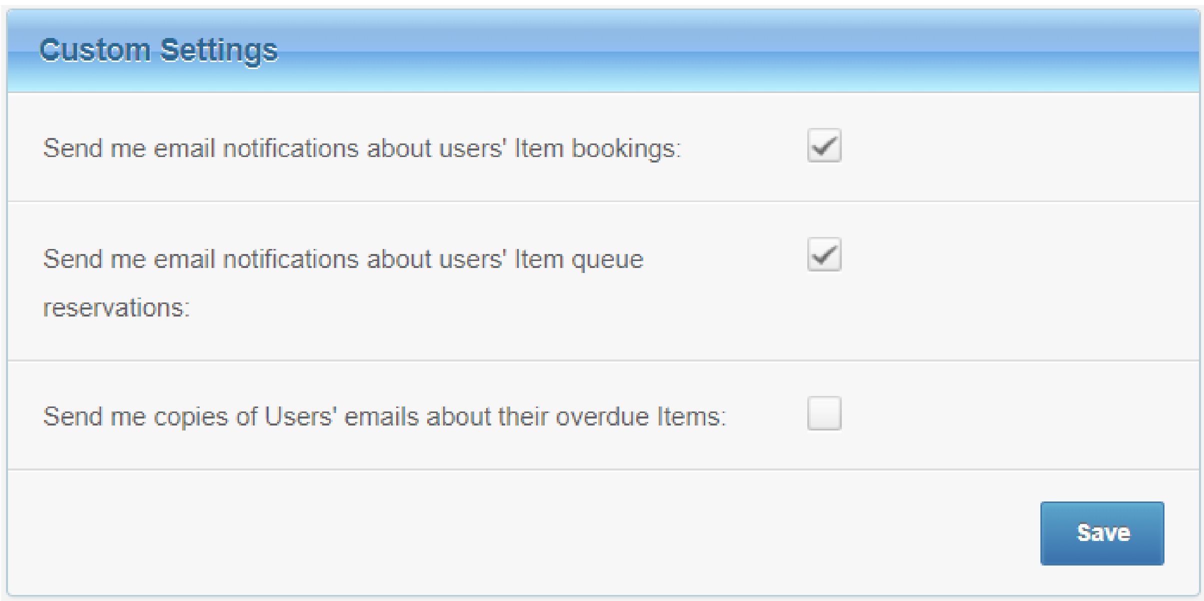
Go to the User management page, press the user's Action button and choose "Send email":



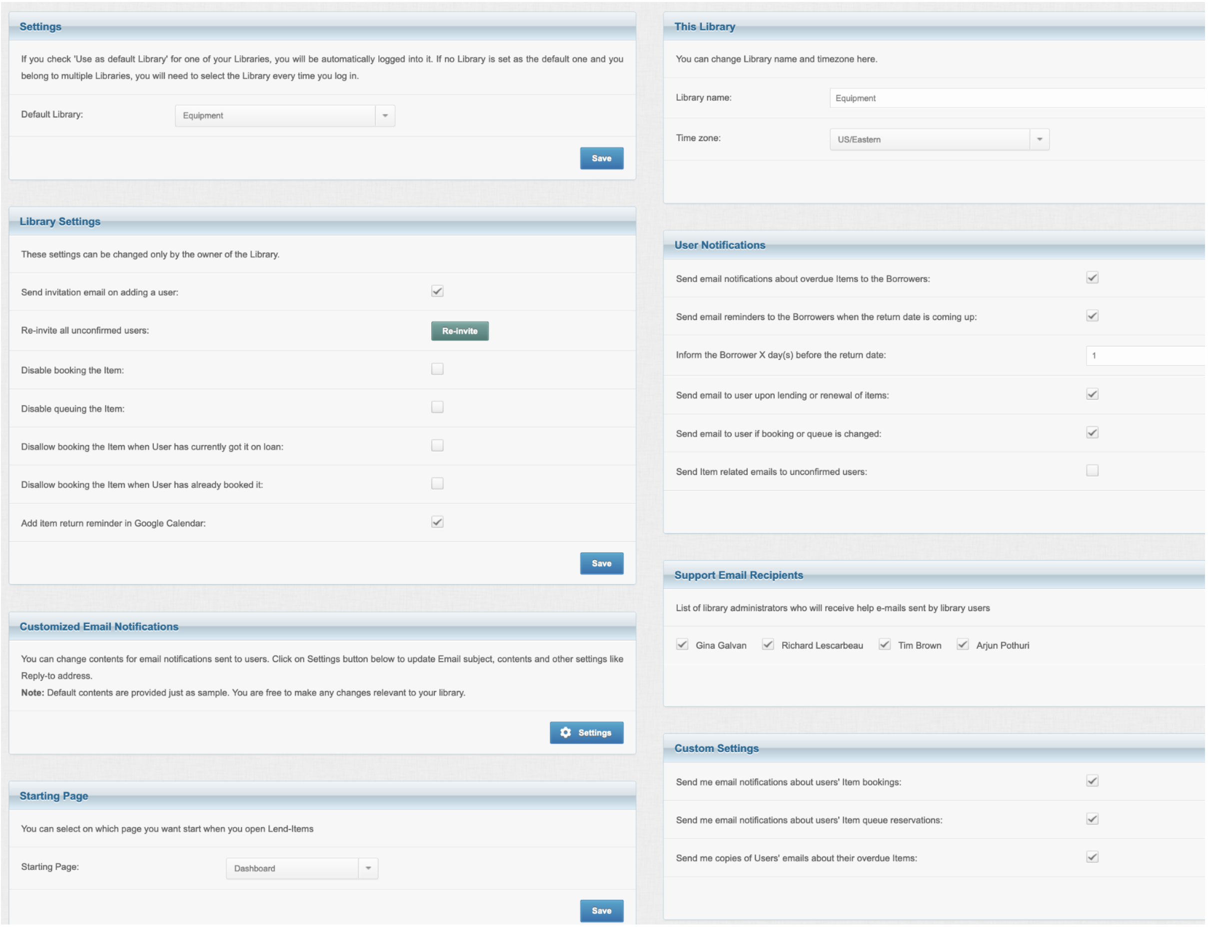
Email Notifications

Library administrators can choose whether to receive copies of emails about users' Item bookings, queue reservations and overdue notifications.

The library administrator should log in into their account, go to the settings page and at the bottom of the page there are checkboxes that allow the administrator to choose whether to receive a copy of these automatic emails:



Settings Page for Customers with Customized Emails



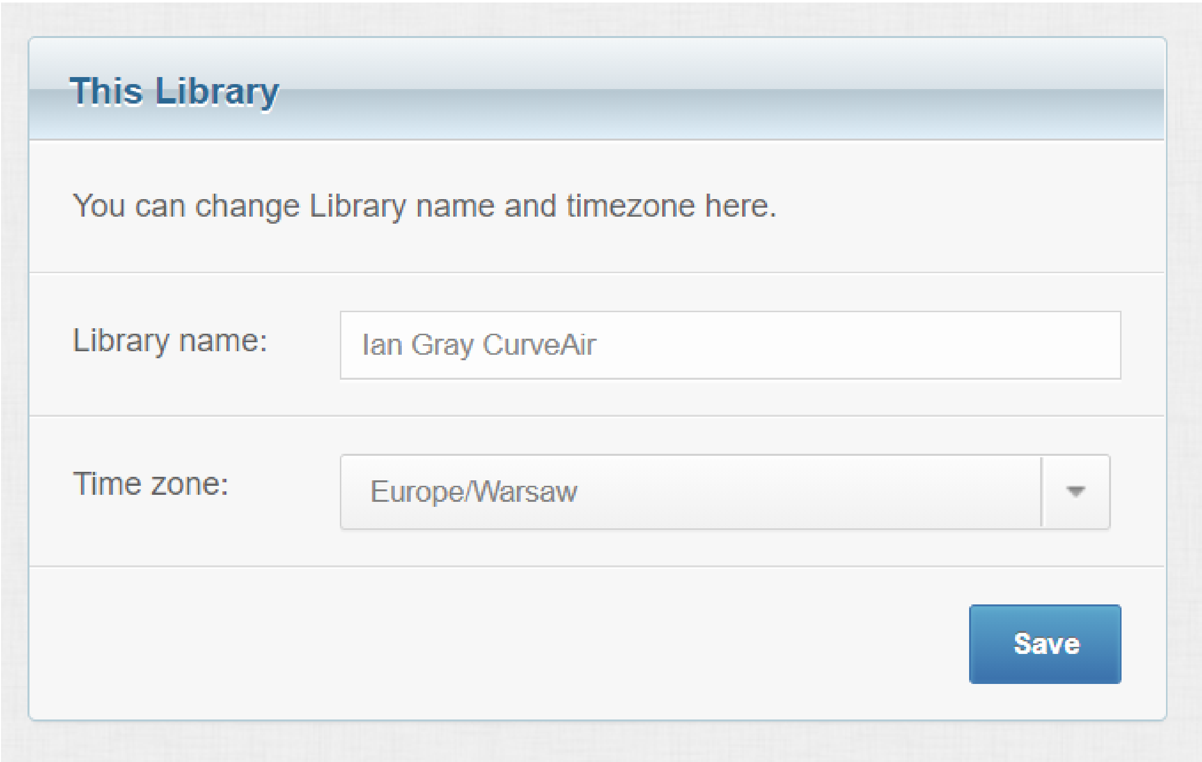
Settings

Owner-Only Settings

There are certain settings that only the owner of the library can change. These settings are divided into groups;

This Library

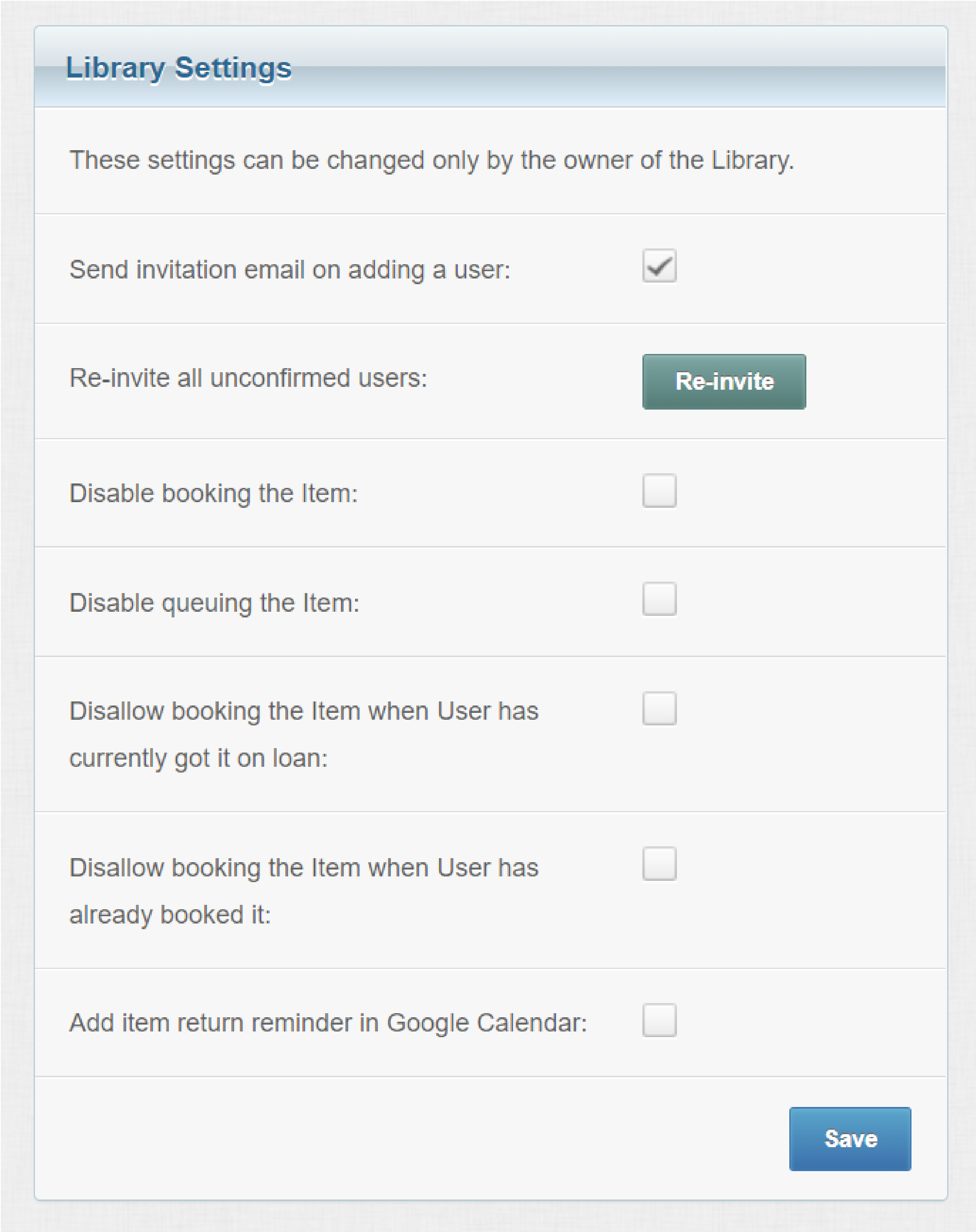
The owner can change the name of the library and the Time zone of this library.



Library Settings

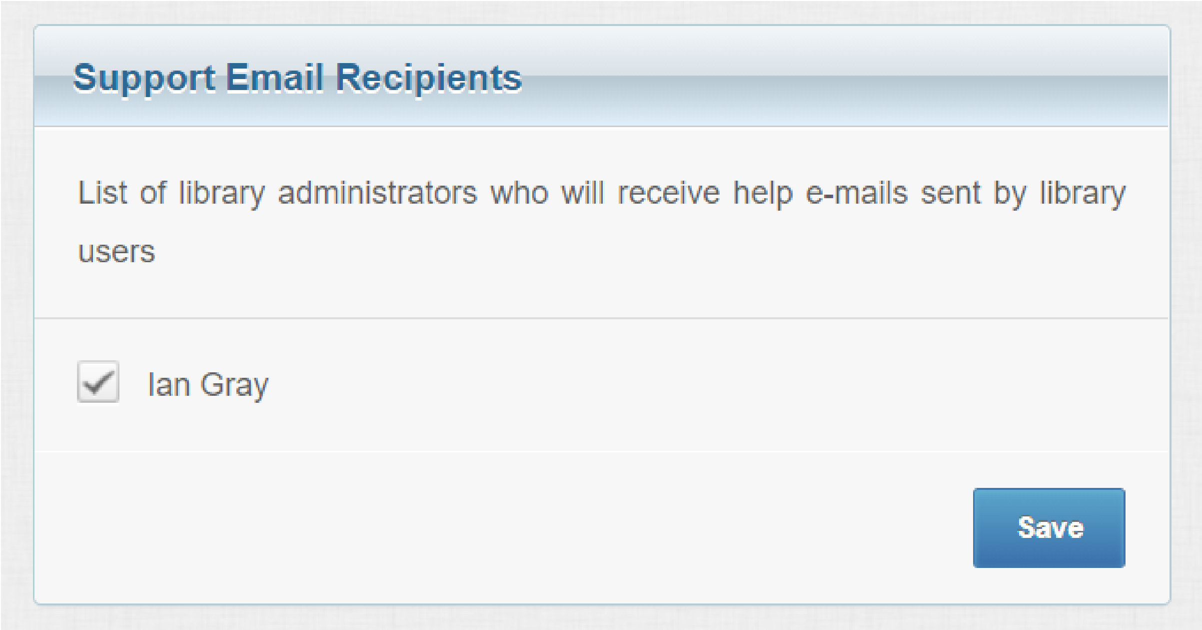
The owner of a library can make changes to the following settings for their library;

- Select whether an invitation email is sent when a user is added to the library.
- Send a Re-invite email to all unconfirmed users.
- Disable booking of Items.
- Disable queuing of Items.
- Disable a user from booking an item when they already have it on loan.
- Disable a user from booking an item when they have already booked it.
- Enable adding a Google calendar reminder when an item is booked.



Support Email Recipients

This option allows the owner of the library to select the list of administrators who will receive help emails sent by Library Users.

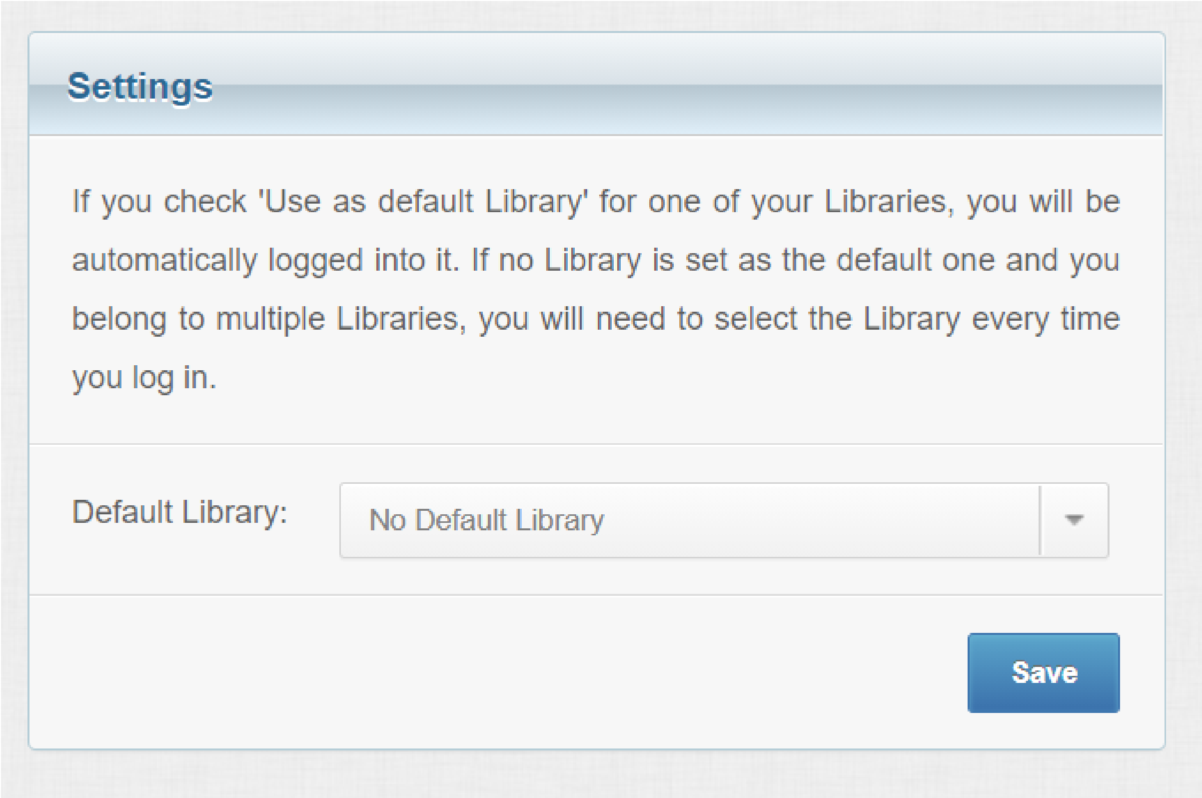


Administrator Settings

There are certain settings that administrators of a library can change. These settings are divided into groups;

Settings

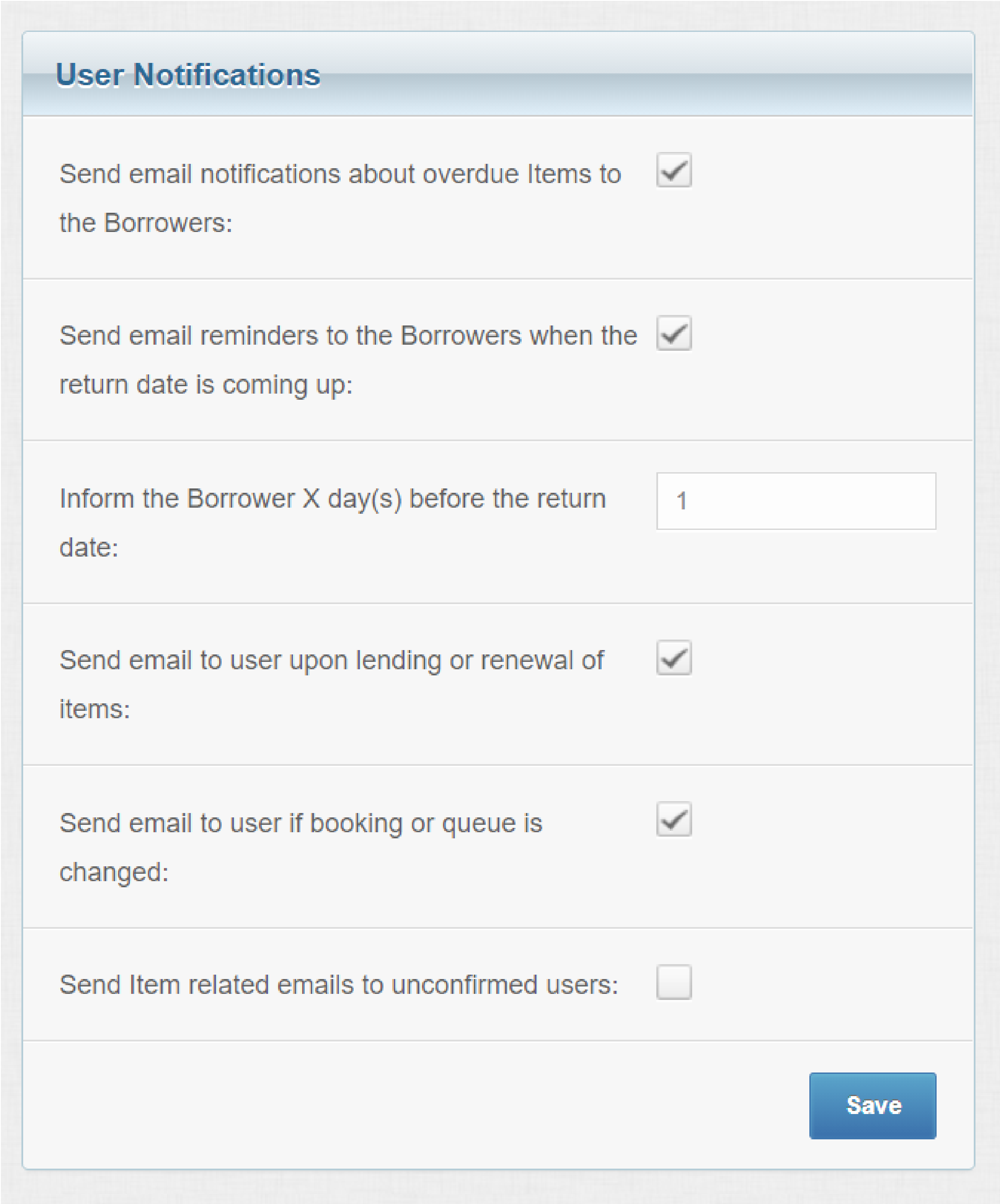
Administrators can select which library they would like to have as the default Library when logging in.



User Notifications

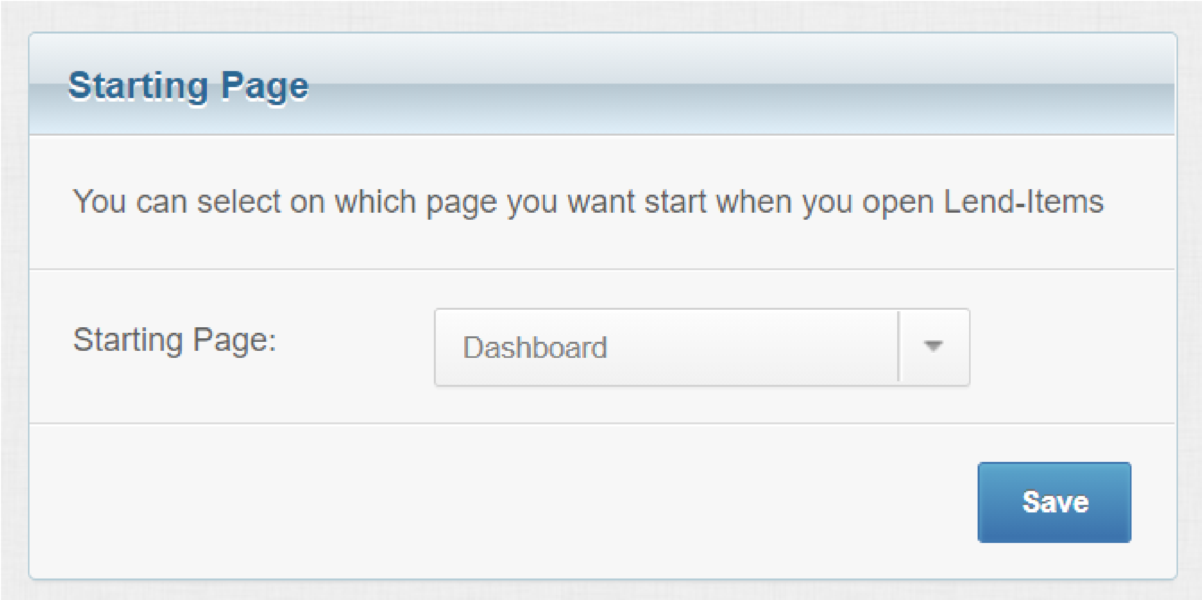
Administrators of a library can make changes for user notifications and emails.

- Send email notifications about overdue Items to the Borrowers:
- Send email reminders to the Borrowers when the return date is coming up:
- Inform the Borrower X day(s) before the return date:
- Send email to user upon lending or renewal of items:
- Send email to user if booking or queue is changed:
- Send Item related emails to unconfirmed users:



Starting Page

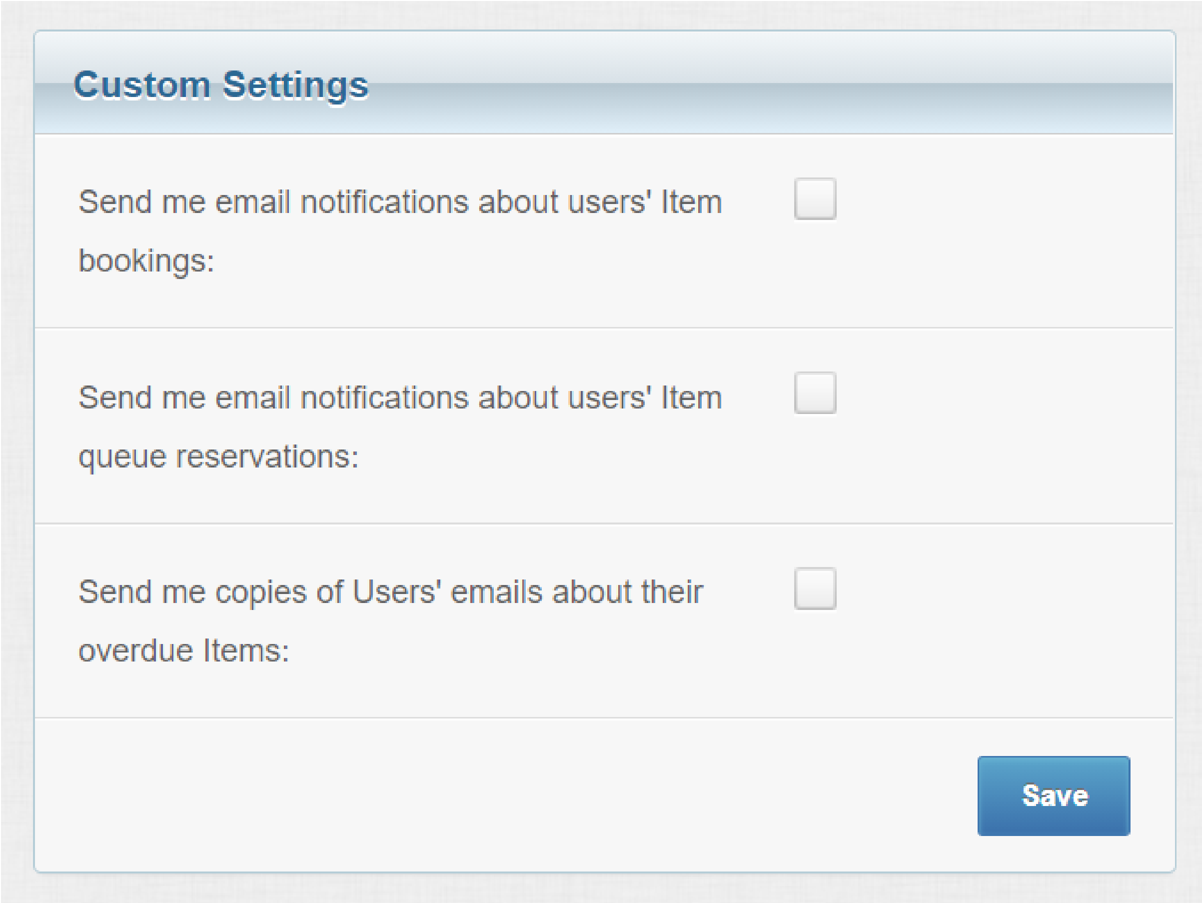
Administrators of a library can determine which page will be shown when they first open the Lend-Items application.



Custom Settings

Administrators of a Library can select if they want to receive notification emails when;

- A user books an item
- A user queues for an item
- A user has an overdue item


Custom Settings
Send me email notifications about users' Item bookings:
Send me email notifications about users' Item queue reservations:
Send me copies of Users' emails about their overdue Items:
Save

Legal and Commercial

System Architecture

Security

We recommend to use OAuth2.0 based authentication on Lend-Items using Google, Yahoo or Facebook account. In that case brute force attack prevention is done by these authentication providers.

For Lend-Items account we currently don't have prior login rate limiting but we are able to prevent brute force attacks once we find suspicious IPs or subnets. We are using SSL protocol and App Engine Firewall service to manage Lend-Items' security as it is hosted on secure Google servers.

Hosting

Data Storage

All our data is stored on Google Cloud.

Data Backup

All our data is stored on Google Cloud no-sql database with replication index = 3, i.e. data is stored on 3 servers simultaneously. If one server fails, the data will be automatically restored from the other two.