1/2015

AT4ALL Resource Manual *1/2015*

INTRODUCTION

AT4ALL.com is an online assistive technology (AT) distribution service. The purpose of this document is to serve as a resource for all general AT4ALL functions and the appropriate use of the site. Therefore, the document format will follow the format of the site. In addition, as each agency/program may use the site for different purposes, some functions may not apply to all users. Also, if an agency has developed specialized custom functions on their site, they may not be included in this manual. The resource manual is to be updated when features are added or site functions are changed. The site is evaluated on an annual basis, upgrades are suggested, voted on, and then implemented. The Resource Manual will be updated to coincide with the annual upgrades.

There are several terms, which will be used continuously throughout this document. In order to ensure consistent understanding, these terms will be defined in this section. There are several types of individuals who may use the site. Every effort is made to make the site accessible and user friendly for all. The term "General User" is used to describe users who have no special privilege or responsibility in AT4ALL. General Users often consist of the public, and are the primary users of the AT4ALL. "Program Managers" are users with administrative access to the system. Some of the responsibilities are managing loans, items, and accounts for their program. Program Managers can have distinct management responsibilities for managing items and/or accounts. The purpose of dividing administrative tasks is to reduce the workload for the administrators. With this division of tasks, Program Managers are divided into two groups, "Item Managers" and "Account Managers." Item Managers have item specific access and responsibilities. Account Managers have account specific access and responsibilities. Item Managers can add items, change ownership of items, facilitate loans, and remove items. Similarly, Account Managers can add accounts, deactivate accounts, edit accounts, add accounts to programs, and change account passwords. For the purposes of this document, these two responsibilities are often referred to as one position, but in the system these are two distinct positions. Finally, there are "Regional Administrators." This is the highest level of AT4ALL access and responsibility. Regional Admins are responsible for maintaining the website in their area, have complete administrative access to the entire system, manage general user accounts, items and program Manager accounts.

All users can list and access equipment in one of five transaction categories:

- Loans-Device loans are defined as the loan of a device to assist in decision making, to serve as a replacement or loan device, provide an accommodation on a short-term basis, or assist with professional development.
- Wanted- The Want Ad feature allows a user to post a notice about an AT item he/she is looking for, and connect with users who might be selling/giving away that item.
- Sale- Sale items are AT devices listed for sale.
- Free-Free items are AT devices listed as free or give away items.

- Demo-Device Demonstrations are defined as the demonstration of a device in order to compare the features of a particular AT device or category of devices for an individual or small group. The purpose of a device demonstration is to enable an individual to make an informed choice.

NOTE: Items CANNOT be sold or given away via the site. The site only provides the contact information for the owner of the item(s), and interested parties must contact the owner to discuss terms of a sale or give away. If an item is sold or given away, the system will prompt the listing party to answer questions pertaining to the recipient. This information will be transferred to the federal report under the "Exchange" information.

HOME PAGE

START HERE-This search bar allows users to enter keywords and phrases to begin searching for equipment. After entering key words/phrases, users can further filter results by selecting a category from the drop-down menu adjacent to the "Start Here" search field. Users can also select "Advanced Search," which will load additional search filters, which include Programs, Classifications and Types of Equipment.

Log in – This is located on the left side of the page. It allows a person who has already set up an account to log into the website

Request a New Account- This links new users to the "Request a New Account page." This is a step by step process that allows a person to set up their own account (ONLY if the person has a valid email account). An account gives the person access to contact information on items listed on the website and to list their own items. All required fields are indicated. A consumer must create a password in order to set up an account. The password must contain one alpha character and one numeric character and must be at least six characters in length. It is highly encouraged to use the password clue question. Users can choose one of three questions from the drop down menu and type in the corresponding in the requested field.

I forgot my password – After an account is setup up, a person can use this feature if he or she forgets his/her password (this is related to the password clue question on the request new account page). The system will ask for the user's email address and the response to the chosen security question. If answered correctly, the system will send the password to the email address associated with that account. NOTE: If the user experiences issues when resetting or accessing his/her password, the user will need to contact a Program/Regional Manager. Contact information can be found via the "Contact Us" page.

<u>Once logged in, users will be able to see the following links/information, depending on their access.</u>

These links are available at the top of every page-Account Name**,** Logoff link**,** View Bookmarks, and Administrative Checkouts (only available for Managers)

Announcement add/list –Only Regional Administrators have access to manage announcements on home page of website. General users are able to view announcements, which contain information on how to use the site, or upcoming AT events around the state.

Log off-allows person to log off the website

Featured Equipment-Users can view equipment selected as featured on the site. Program and Regional Administrators choose items to be featured on the home page via the item details page.

MY ACCOUNT -The "MY ACCOUNT" link will direct the user to his or her personal account information. If the user needs up update his or her account information (address, phone number, change password, etc.) he or she can do so from this page, by clicking the "Edit Account Information" link. From this page, users can also view the following information

> **My items** – listing of items that the logged in user has listed
>
> **My loans** – listing of items that the logged in user has borrowed
>
> **My History-**listing of the account user's complete AT4ALL history. Includes items borrowed, items listed by the user, items received through exchange, items received through reuse, and items sold or given away by the user through exchange.
>
> **Logoff-**link to user logoff. Clicking this will log the user our of his/her account.

ITEMS-The Items link will take the user to the advanced search page, and a listing of the most recently listed items. On the left hand side of the items page, the user will se the following links.

> **View New Items-**Frequent visitors to AT4ALL may need to know what items have been recently added to the site. By simply clicking on the "View New Items" link a listing of the most recently listed items will be displayed.
>
> **Item Add** AT4ALL allows users to list available assistive technology. Once logged in, a user can access this feature by clicking on "Items" and the

“Item Add” on the left hand side. All required fields are marked. A federal reporting category has been added with a pop-up menu of choices (and definitions of those areas). Digital photos of the item can be added. The user can designate any of the photos as the “Primary” photo, which will appear with the item on the search results page. The manufacturer’s suggested retail price (MSRP) should be used when filling in the “estimated current value” field for those items that are being sold or given away. The “asking price” field is generally used only when the items are being sold. Loan programs may, however, use this field to list the cost of the item to the borrower (ex. deposit, etc.).

> Program Managers have the option of marking an item available for “This Program Only.” This allows the item to be restricted for viewing by the users assigned to the program. If this box is not checked then the item will be shown to all AT4ALL accounts, and thus can generate requests from others outside the program area. Items listed by general users are listed for 90 days (listings can be renewed). Items listed by programs can be listed indefinitely. The user can list the item under multiple “Website Searching Categories.”
>
> **Adding an Item for Third Parties:** AT4ALL has the ability to serve persons that do not have web access or are otherwise unable to list items on their own. In order to manage items efficiently, the owner of the item must be added to the database, and then an item can be listed on behalf of the owner (see admin section for more information in “Person Add”). Item Managers have permission to list items for third parties, but Account Managers have permission to add accounts. If separate people hold these positions, collaboration may have to take place between the Account Manager and Item Manager. When adding an item for a third party, by default, the name of the person who is logged will automatically appear as the owner. However, if the third party has been added to the system, the item manger can change ownership by selecting the “Change Owner,” link. This will take the item Manager to a search page, where he/she can search for and select the third party’s name. This will change the ownership to the appropriate person.

Inventory Labels-The website automatically assigns a number to each individual listing called a Website ID. A search for an individual item can be performed using this number, which can be printed on a label. An entire program’s labels can be printed in a mass printing by locating the appropriate “Participating Program” under the “Contact Us” link. Click on “Create Program Inventory Labels.” Individual labels can also be printed for items by finding the item(s) and bookmarking them. Click on

“View Bookmarks” and the link “Create Inventory Labels.” The label size is an Avery Label 5160 or any brand, which prints 30 labels on an 8.5” X 11” page. Label size is 1” by 2 5/8”.
When printing labels ensure that “Page Scaling” is set to “none.” By using the template that appears on the screen you can indicate where on the sheet printing should begin.

Removing an Item-Items can be removed from the website by the person or Program Manager responsible for that item. Regional Managers can also remove items. To remove an item, the user must first locate it, through item search functions or via the user’s Account History. Once the item is located, the user must click on the item name in order to load the item details page. Once the item details page appears, the user will need to click “Edit Item Information.” There is “Remove Item” at the bottom of the edit item information screen. The user must click this button, and then verify the reason for removal before the site will delete the item. There are a number of reasons to choose from as to why the item is being removed. This information is used and transferred to various report forms. If an item belongs to a program, this data can be viewed/sorted using the data export feature. If a general user lists an item, this information is transferred to the “Exchange List.” Once an item is removed from a federal reporting program (because it was either given away or sold) performance measure and satisfaction data is requested. If a Program Manager does not have that information, but needs to remove it at that time, the transaction information is kept on each list, allowing the Manager to go back and enter the data at a later time.

Place Want Ad -If a user is in need of a specific item, the user can place a Want Ad. Users must specify information about items they desire (follow the steps used when adding an item). Users are able to search for wanted items just as they do for listed items (see ”Searching for Items”). NOTE: Items to be sold or given away are NOT to be listed as Want Ads. Those items should be listed by selecting “Item Add” and then selecting the appropriate transaction type.

Item Searching -A user can search for items from any page, as the “START HERE” search field is visible from anywhere in AT4ALL. To search, the user must type in key words into the “START HERE” search field. From the Items Page, users will see the Advanced Search fields. Users then can narrow their search by using the following Advanced Search functions.

> **Categories:** Users may wish to narrow their search by selecting a category from the first drop down menu in the Advanced Search. There are 40 categories in all.

Classification: The second drop down menu of the Advanced Search includes item classifications set by the Federal AT Act. When items are listed, they must be listed as one of these classifications.

Transaction Types: Users may wish to narrow their search by searching by Transaction Type. These are located in the third drop down menu and include Demo, Free, Loan, Sale and Wanted. For example, if a user wanted to search the "Want Ad" items, the user would select the "Wanted" transaction type, which would narrow the search list to only wanted items.

Programs: The fourth drop down menu includes a list of all the programs that who list items on AT4ALL. Users can select the program from this drop down menu, and the site will only search for item owned by that program.

Include Expired Items: Managers can also search for items that have expired by checking the expired checkbox before submitting their search request.

Search Results-After submitting a search request, a list of all matches is shown. The Item Name, Website ID will appear, followed by the transaction type, program, location and an abbreviated item description. If a picture is included with the device listing, that image will appear on the right side of the item name and description. NOTE: The listing may contain several photos, but only the one designated, as the "Primary" photo will appear, next to the item, when the search results are displayed.

Bookmarks-Also to the right of each item, is an image of a book. Clicking this image allows the user to add this item to a personal bookmark list. This list allows the user to maintain a list of items that he/she is interested in while still searching for more items. After compiling a list, users can view the items that are bookmarked on one page, and remove or initiate the loan process for the items. The bookmarks can be easily accessed from the link at the top of the page ("View Bookmarks") or on the left hand menu ("Bookmarked Items").

Sorting-Users can sort the search results by using the "Sorting" drop down menu on the right side of the Advanced Search fields. The site will automatically sort by "Relevance." Also, by default, the site will sort by availability. All available items will appear first, with non-available appearing towards the end of the list. Other sort options include:

- Alphabetically (A-Z or Z-A) by:
  - Item Name
  - Program
  - City
  - Transaction Type (Demo, Free, Loan, Sale)
- Listing Date: New to Old, Old to New
- Asking Price: Low to High, High to Low
- Distance from zip code

Custom Item Report-Directs the user to a printer-friendly version of the search results.

Item Details-Users can view more information about the item by clicking on the item name. The full item description, as well as all images listed with the item, will appear. Users will find the item location, item classification, Website ID, date purchased, the manufacture's website (if applicable), date listed, and the item categories. Next, the transaction information is listed. This includes the transaction type, estimated current value (MSRP), asking price (if applicable), the program that owns the items, and the item expiration date. There is an additional "Bookmark" link at the bottom of the page. Program Managers will see additional information, such as the loan history of the item. The following links are also available, to Item Owners and/or Managers, on the Item Details page:

> **Edit Item Information-**This function allows the item owner, or Program Manager, to edit/add information about the item
> **Duplicate Information-**Item Managers have the capability to make duplicate entries of items in their program. This is useful when there might be many items that are the same or very similar in a loan pool. To make a duplicate entry, first select the item to be duplicated and view its details. On the item details page a link labeled "Duplicate Information" is displayed. (Note: This link will only be displayed if the user is an item Manager and the item is in the user's program.) Clicking on this link will redirect the user to the item add page, but all the form fields will be completed. The item Manager must modify any item properties, upload any images (duplicating an item does not make a copy of the images and then click on the "Add Item" button at the bottom of the page. Duplicating items does not make a copy of the images uploaded for that item. You must upload an image for each duplicated entry.
> **Click here to ADD this item to the featured items for the website-**A Regional Manager may choose to feature a certain item on the home page of the site. Clicking this link will redirect the Regional Manager to another page, on which the Regional Manager must indicate the date range for the item to be featured. Once the date

range fields are complete, the Regional Manager must click the "Add Equipment to Featured List" and the item will be added. The item will be automatically removed after the set date. To remove an item any other time, click on the item name, and there will be a "Click here to REMOVE this item from the featured items for this website" on the Item Details Page.

Click here check this item IN/OUT for administrative purpose (aka Administrative Checkout)- Administrative Checkout removes an item from the loan, demo or reuse pool but without processing a loan or removing it from the whole system. If an item is placed on Administrative Checkout, the general user cannot view it. A Manager may choose to place an item on Administrative Checkout if the item needs to be repaired, have parts/peripherals replaced, or to "hold" a free item until the consumer can try it and verify it will work for him or her. To access Administrative Checkout for an item, the Manager simply has to click on this link from the item details page. The item will be added to Administrative Checkout, and the link on that page will change to "Click here to check this item IN for administrative purposes." Clicking this link will take the item off Administrative Checkout.

The "Administrative Checkouts" link appears at the top of every page when the Manager is logged in. This list contains the items on administrative checkout for ALL programs. To find a specific program's list, select the program from the drop down list. NOTE: The Administrative Checkout function does not link up with the "Remove Item" function at this time. If an item is on administrative checkout, and needs to be removed from the site, the item must first be checked IN from admin checkout and then removed from the site, via "Edit Item Information."

Contact Us-On the home page, in the mid-page banner, there is a link titled "Contact Us." Clicking on this link with take the general user to a contact information page. This page contains contact information for the AT4ALL Administering Program. On the left side of the page, under the Menu, is a link titled "Participating Programs." This links to a listing of all the programs using AT4ALL for AT distribution services. Each Program information page includes general contact information, loan program details, and a listing of the Program Managers. Program Managers can access their program information (by clicking on the program link) via this page to complete the following tasks.

Create Program Inventory Labels

Clicking on this link allows the Program Manager to generate QR and/or Bar Code labels for items listed in that program's inventory. Once generated, the labels can be printed.

View Inventory Statistics

- **Active items by transaction type (loan, sale, free, demo).**
- **Reuse activity by type (Give away/Free, Sale, Open Ended Loans) and time frame (last 6 months, Last Year, All Time).**
- **Peripherals with Problems**
    - If items are listed/loaned with peripherals (cords, chargers, cases, etc.) and some or all of the peripherals are not returned with the "parent" device, the Program Manager would need to indicate that on the item listing (via editing the item) or upon checking in the loaned device(s). Those missing peripherals would then be listed here, under the program's "Peripherals with Problem." This function gives the Program Manager an idea of peripherals that need to be replaced. Or if the peripheral is eventually returned, the "parent" device can be easily located using this function.

Edit Program Information-Program Managers, after consulting with the Regional Manager/AT4ALL Coordinator, as appropriate, can use this function to change the following program information. These changes would be reflected through out the site.

- **Program Name**
- **Program Contact Information**
- **Program Email Notifications**
    - The site generates email notifications to users when a loan item is requested, when the loan due date is approaching, and when the loan is overdue. Programs may choose to include additional information on these email notifications. That information can be added here.
- **Loan agreement wording**
    - Programs, which maintain an equipment loan pool, can determine, and set, their own Loan Agreement wording, and enter and edit it in this field. This wording will then appear on the Loan Agreement Form.
- **Service criteria**
    - Programs can enter/edit program eligibility requirements and service criteria in this field (i.e. fees, borrower responsibility, etc.)
- **Program logo**
    - Programs can upload their program logo to appear next to their program name on the list of Participating Programs

Admin/Help-On the Home page, next to the "Contact Us" link, the general user will see a link titled "Help." Program Managers, who have additional access, the link is titled

"Admin/Help." Depending on the user's level of access, different information can be obtained and viewed using this page. In the interest of creating an all-encompassing Resource Manual, all features of the Admin/Help Pages will be reviewed in the following sections.

- **Help-**As previously stated, General Users will have access to the "Help" page and the following features
    - Account Help-Addresses frequently asked questions regarding the following topics
        - Requesting an Account
        - Creating an Account
        - Account Management
        - Account Passwords
        - Logging on
    - Item Help-Addresses frequently asked questions regarding the following topics
        - Finding an Item
        - Adding an Item
        - Managing the Items You've Received
        - Managing the Items You've Added
    - Program Help-Addresses frequently asked questions regarding the following topics
        - Program Info
        - Program Management
    - Bookmark Help-Addresses frequently asked questions regarding the following topics
        - Bookmark Info
        - Bookmark Management
    - Quick Start Guide
        - On the left side of the screen, under the Menu heading, is a link to the "Quick Start Guide." This is a PDF document, which provides a brief overview of key AT4ALL functions.
- **Admin**-Account, Item and Regional Admins will have access to the following additional, administrative features.
    - **Account Management**
        - **Person Add**-If a third party does not have internet/web access, or needs assistance in setting up an account, an Account Manager, can create an account for that third party via "Person Add." When setting up a third party account, the following information is needed:
            - Required Field: First and Last Name
            - Required Field: Contact information, including address and phone number
                - An email address is NOT required, because many third party accounts are being added because the user does not have email access.
            - Not Required: Demographic Information

- Not Required: Account Information
    - An email address and password are not required. Many third party accounts are being created because the user does not have access to the web/ email. The user cannot access the site via the web, and cannot receive email reminders. Therefore, there is no need for an email address and password. These can be added later, if applicable, by editing the person's account.
- Organization: If the account is only going to be for a "General" user, that user does not need to select any organizations. However, if the account is being added for an Account and/or Item Manager, Organizations may need to be added. This allows the account to be "assigned" to a specific program. This can be helpful if a program wants to limit access to their inventory. In order to loan out equipment, or request Program Only loan items, the user must be a member of the program "Organization."
- Client Of: This allows a program to establish a clientele with which the program has worked. Marking a person a "client of" a program gives a Manager the ability to view/edit the user's account information.

▪ **Person Search-**It is often necessary for Program Managers to locate a person's account. Using Person Search, Program Managers can edit account information, viewed items owned, borrowed, and account history. This function links to a search page. The Program Manager can type any name, email, or fragment of a name or email into the search field. The site will find, and list, all names or emails that match the search phrase. The Program Manager can also search for all users associated with a specific program, by selecting that program in the "Program" drop down menu, leaving the search field blank, and clicking the Search button.

- To further filter the results, the Program Manager may select the following from the second drop down menu titled "Display"
    - Program Clients
    - Program Personnel
    - Personnel and Clients
- The Program Manager can also search by active and inactive accounts by making a selection in the third drop down menu.

After submitting the search, AT4ALL returns a list of matches. The list will include the person's name, email (if applicable), phone number, address and some quick links.

- **Items owned**-Link to a list of items the person has listed.
- **Items borrowed**-Link to a list of the item the person has borrowed via AT4ALL.
- **History**-Link to a complete history of the person's AT4ALL history, including:
    - Account name and who created the account
    - Items borrowed
    - Items listed
    - Items received through exchange
    - Items received through reuse
    - Items sold or given away through exchange (items the person has listed/owned that were sold or given away)

To view further details about the person, the Program Manager must click on the name of the person to view the details of the user's account: contact information/preferences, account information (including organizations and clients of which the person is a member), and demographic information. The following functions can be preformed via the user's detail page.

- **Edit Account Information-**This link can be used to edit account information, contact methods, passwords, organizations and client information.
    - **Edit AT4ALL Positions-**Account Managers and Regional Admins will need to use this link to edit AT4ALL positions/access. First, the program for which access is required must be selected from the program drop down menu. Then the position the person needs to hold within that program (Account or Item Manager) needs to be selected. If a user needs to be both an Item and Account Manager for a program, the positions need to be added separately. Finally, email reminder preferences need to be indicated. If the user needs to receive email reminders, the box next to "Check to enable email reminders for item activity" must be checked. If unchecked, that user will not receive email reminders about item activity. Once all positions have been added/edited, the user can

click “Done Editing Positions” and will be directed back to the person’s account information page.

- **Delete this account**
- **Display this Person’s Items**
- **Display this Person’s Loans**
- **Display this Person’s Account History**

- **Program Add**-The third function, under Account Management, in the left hand menu, is Program Add. A wide variety of agencies may want to use AT4ALL to Manager their reuse, demo and loan programs. In order to do this, the agency must be added as a participating program to the site. Only Regional Administrators can add a program. Program information must include the program name, program type, complete address, default loan period (days), and overdue loan reminder interval (days). Programs can also provide contact information including email and web addresses, loan agreement wording, service criteria, and a program logo.

- **Loans (second section in the left hand menu)**
  - **Loan List-** This link directs the Program Manager/Regional Admin to a comprehensive list of all loan activity. Managers can process, edit, and cancel loans from this page. First, the loan program must be selected from the Program drop down menu. Loan activity, for the selected program, is presented in a dashboard format and highlights all loan categories (see below). Each list/category can be searched using the “Search Phrase” field. Managers can search by website ID, item name, borrower name, etc. Each list can also be sorted by item, due date and borrower. To the left of each item is a box icon. Clicking this icon will link the Manager to the loan details page. It shows the item requested, the requesting person, option for printing the loan agreement, date of request, loan status, loan date, due date, email notice date, and comments. The loan can be checked in, edited or cancelled from this page. Loans can also be processed, checked in, edited or cancelled from these lists. **NOTE: If a loan is cancelled, it CANNOT be retrieved.**
    - **Pending-**When an item loan is requested; the request is placed in the pending category. An email loan request notification is sent to the Item Manager. The Item Manager can find the loan request in the pending queue, and process or cancel it from there.
    - **Waiting-**If an item is already on loan, the borrower is notified the item is currently on loan when the “Request Loan” button is clicked. If the consumer would like to be placed on a waiting list for the item, the user will need to select “Submit Request Loan” on the following page. The

request will then be placed in the "Pending" category, and an email notification is sent to the item Manager. The Item Manager should contact the requester and verify that he/she would still like to be on the waiting list. The Item Manager can locate the loan in the pending list, select it, and check the "Add to Waiting List" box. The request will then move from "Pending" to the "Waiting" list. The site/ waiting list tracks what user was placed on the list, and when, so items must be loaned out in that order. The Item Manager, who facilitated the first request, will be notified, via email, when the item becomes available. The Program Manager can then process the loan, when the item is available, directly from the waiting list. The waiting list is also available on the item details page, under loan history. Regardless of how the loan is requested (via the item page or via the user's bookmarks) or added, the user or Program Manager will be notified the item is currently out on loan, and will give the user and the Manager the waiting list option.

    - **Out-**This list consists of all the program items that are currently on loan. Loans can be checked in, edited and cancelled from this list.
    - **Overdue-**This list specifically highlights the loaned items that have not been returned and whose due dates have passed. Loans can be checked in, edited, and cancelled from this list.
    - **Open Ended-**List of the program's current Open Ended loans. Open Ended Loans are, technically, considered a Reuse activity. The program retains ownership of the item, but it is loaned to the borrower for an unspecified amount of time. Loans can be checked in, edited, and cancelled from this list.
    - **Returned-**A comprehensive list of all the items returned (checked in) since the program started using AT4ALL. Loans can be cancelled or loan information can be edited from this list.

- **Loan Add-**The second menu item under loans is "Loan Add." Item Managers can add item loans for third parties using this function. Clicking on "Loan Add" will direct the Manager to an Item Search page. There, the Manager can enter in the item name or web ID number. The site will return the item, or a list of items. The Manager then selects the item(s) by clicking on the item names. The Manager can select numerous items, from the list, or by continuing to utilize the search field. The site will track the selected items in a list at the bottom of the page. If the Manager wishes to remove an item from this list, the Manager can select the “remove” link, next to the item name, at the bottom of the page. Once the Manager is done selecting items, he or she will need to click the “continue” button at the bottom of the page. Next, the Manager must select the borrower. The Manager does this by typing in the borrower name or email address. The site will retrieve a list of borrowers, and the Manager must select the specific borrower by clicking on the borrower’s name. This will link to the final loan page, which outlines the loan details, and prompts the Manager to answer questions for data collection purposes. It also requires the Manager to set the loan date and due date, email reminders, and add comments as necessary. If multiple items are being loaned out, the Manager must complete this information for EACH item. Once all the information is entered, to complete the loan, the Manager must select “Finish Loan(s).” These loans will then be placed in the “Out” loan list.

- **Loan Requests-**Individuals can request item loans directly from the site in two ways. The loan request process can be initiated through the bookmarks list, or by selecting the “Request Loan” button, located at the bottom of the items details page. This button will only appear if the item has been designated as a loan item.
- **Loan Agreement Form-**After the loan is successfully processed, the site will generate a loan agreement form. To access the loan agreement form, the Item Manager must select one of three links: “Click here to print without loan comments, ” “Click here to print the agreements with loan comments (two page minimum),” OR “Print the Loan Agreement with a QR Code with loan comments (two pages minimum).” Comments can be added during loan processing. After selecting an option, the site will generate the agreement form as a PDF document, which can be printed, saved to the Manager’s computer, and/or emailed to the borrower. Loan agreement terms and conditions and logos can be added/edited via the program’s page. **NOTE:** If the program is a federal reporting program, federal data collections questions (primary purpose, performance measures/outcomes and/or satisfaction levels) are included on the loan agreement form. All of the questions must be answered and entered into AT4ALL upon check out/check in

Loan Management-The following information, while not a menu item on the Admin page, contains important information on loan management functions. Managers will see these functions throughout AT4ALL.

- **Email Notifications-** Items Managers may choose to receive item management notifications via individual emails, or combined, into one digest email. This selection can be made through editing the Item Manager's account.

- **Loan Request Notifications-**When a loan is requested, via the site, an email notification is sent to the Item Manager(s), prompting the Item Manager(s) to process the loan. An email is also sent to the borrower, stating the request has been received and forwarded to the Item Manager(s).
- **Loan Return Notification-**The site generates reminders for loans which are approaching their due date. The time of notification is, by default, five (5) days prior to the due date. However, this can be changed upon creating/ processing a loan. The borrower and the Item Manager both receive these notifications. The exception to this process would be items loaned to consumer with no email address listed with his/her account. In this case, the Item Manager, who processed the loan, receives the reminders and is expected to contact the borrower to arrange for the return.
    - **Overdue Loan Reminder Message:** The site generates a notification, sent to the borrower and Program Manager, when an item loan is past its due date. The Program Manager can set how often these email notifications need to be sent through the Edit Program Information page.
    - **Loan Request Cancellation-**User who request loans can also cancel those requests. Upon canceling those requests, the item Managers are notified via email that the cancellation has taken place.
    - **Editing Loans**-Loans can be edited (due date, email notifications) by selecting "edit loan." The edit loan function can be found in several places: the loan list, loan details page, and loans by user (person search>items borrowed>edit loan). If the user has several items on loan, the site will prompt the Item Manager to consider editing all loans. To have the same changes apply to some or all loaned items, the Item Manager must select the box next to the item or items to which the edits will apply.
    - **Loan Cancellation-**For various reasons, it may be necessary for a loan request to be cancelled. The user can choose to cancel the request, upon which, the Item Manager will be notified (via email) that the request was cancelled. The Item Manager can also cancel a loan request by clicking on the "cancel loan" link on ay of the loan list pages, or the specific

loan details page. CAUTION! Canceled requests CANNOT be retrieved from the database.

- **Loan Check-in-**The “check-in” function is available to Item and Regional Managers and can be found in several places on the site: the loan lists (Out, Overdue, Open Ended), the item details page under loan history, or the loan details page. Clicking this link will take the Item Manager to a “Check In Loan” page. If the user has several items on loan, the site will prompt the Item Manager to consider checking in all loaned items. To check in some or all loaned items, the Item Manager must select the box next to the item or items that will be checked in. **NOTE:** If the program is a federal reporting program, federal data collections questions (primary purpose, performance measures/outcomes and/or satisfaction levels) MUST be answered/entered on this page.
- **Loan Receipt-**Upon check-in, the site will give the Manager the option of printing a loan receipt. This receipt verifies the item was checked in, and can be printed and given to the borrower upon request.

Reutilization-One of the main functions of AT4ALL is to facilitate the reuse of equipment. In this section, Managers will find features to assist with the administration of this function.

Recycled, Refurbished and Repair Items-This link displays the items, by program that have been listed on the site and then given away. A program must be selected from the drop down menu, and then the items will be displayed. The listing will include the website ID number, the name of the item, the owner, the recipient, the date it was given away and who facilitated the give away. The list can be searched, via the search phrase field, and sorted in various ways (item, owner or recipient name, or removal date). The website ID number and item name heading is a live link that opens the item details page for the device. On the right hand side, there is a “Edit Transaction Information” link. Clicking this link will direct the Manager to the transaction page, listing the recipient, transaction date, sale price (if the item was sold), and federal reporting questions (if applicable). In some cases, it may be necessary for a Manager to edit the transaction information. For example, if data fields were not completed or if the reason for item removal changed.

Exchange Items-Exchange items are those that were listed for sale on the site. This function allows a Manager to manage those items, as needed, by providing a list of exchange items, per date range, on the site. Managers can choose, from a drop down menu, to list “Expiring Exchange Items” or “Completed Exchanged Items,” and then select a data date range. The list can be searched via the search phrase field, and sorted by item or owner name. The site presents the option to "Update Transaction" for completed exchanges, or "Remove Item" for expiring exchange items.

Demonstrations-Federal reporting programs are required to keep track of equipment demonstrations performed by staff. Demonstration activity can be added, edited and viewed through the Demonstrations menu on the Admin page.

Demonstration Add-This link will take the user to a demonstration information page, and will request the performance measure and satisfaction data fields be completed. All required fields are indicated and data must be entered correctly before the information will be accepted. Once the information is entered correctly, the website will request information regarding the items that were demonstrated. The website is able to accept information regarding devices that may not be owned by that particular program (i.e. vendor demonstration).

Demonstration List-Demonstrations added are automatically transferred to the "Demonstration List." Demos are displayed by program, which must be selected via the drop down menu on this page. The list can be searched via the search phrase field, and sorted by demonstrator and demo date. The list displays the federal category under which the demonstrated equipment falls, the demo date, the demonstrating person, and the device that was demonstrated. The federal category and demo data are live links, that, when clicked on, will take the Manager to the demonstration information page. Here, the Manager can view the demo details, and can edit or remove the demo information if needed.
NOTE: After listing the demonstrated items, a Manager cannot go back to add or delete items from the demonstration. The Manager can only change the numerical data fields, such as "number of participants by category."

Reports-Federal reporting programs are required to submit specific data on an annual basis. Other times, Program Managers may choose to run other reports in order to analyze program, item or loan activity. It is possible to run numerous types of reports using the following functions under the Reports menu.

Data Export-Data export allows a Manager to select specific data, by program, within a specified date range. The Manager must first select the type of data to be exported from a drop down menu. The options are:

-Clients
-Demos by Demonstration Date
-Exchange items by Expiration Date
-Items by Creation Date
-Loans by Due Date
-Loans by Loan Date
-Loans by Check-in Date
-Open-Ended Loans
-Removed Items
-Web Sessions
-Web Page Hits

After selecting a data option, the Manager must select the program, from another drop down menu, and then enter a date range. Once all the selections have been made, the Manager will need to click the "Next Step" button in order to proceed. The following page requires the Manager to select the data which is to be included in the export. After all the data fields are selected, the Manager can choose to preview the data or to export to Excel. Once exported to excel, the Manager can choose to sort and arrange the data in order to fit his or her reporting needs.

Federal Report-Federal reporting programs input loan, demo and/or reuse data into the site, which is automatically loaded into this report. The Manager must select the report date range and program. The report is generated as a PDF that can be downloaded and/or printed.

Federal Report Auditing -Federal reporting programs may need to audit their data, on a regular basis, in order to collect missing data, and avoid reporting errors. Regional Managers can use this feature to audit data by category and date range. The Regional Manager must first select the data category from a drop down menu. Once this is selected, the site will prompt the Regional Manager to select various "groups" of data from that category. Once that selection is made, the Manager will need to enter the date range, and then click "Generate Report." The report can be searched and/or exported to Excel. The format of and the categories included in the report will depend on the category and group selected. If errors exist with in the data, the site will notify the Manager with an error message within that specific activity. The error message is a live link, which links to the activity. By clicking on this, the Manager can examine the activity and add/edit/correct data if needed.