Mass Authorization

The following section describes the function 'Mass Authorization' which is located under the 'Functions' menu.

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Mass Authorization

Stated simply, Mass Authorization is a function that was created to track groups or classes of people and enable the user to authorize those people for equipment. When using the system, you will notice that it is a little time consuming to 'Edit' each persons record to authorize them on a piece of equipment, if you have a number of them to do. Mass Authorization allows you to create groups of people, e.g. People in a color class, and then authorize them on equipment all at the same time. This list is retained as part of the system and can be accessed to authorize them on other items at any time.

Selecting 'Mass Authorization' from the Functions menu will leave you on a blank screen with these button options:


(*Note*: You will need valid initials if you try and access this from a 'Launched' system.)

Done   'Done' will take you back to the screen you were on when you selected 'Mass Authorization'.

Overnight   'Overnight' allows you to change the 'Overnight Access' status of people. When you select it you will be asked if you want to 'Add' or 'Revoke' the access. You will then be presented with a dialog where you can enter peoples ID numbers, one at a time. The dialog will come up repeatedly until you select 'Cancel'. The 'Overnight Access' of each person will be set according to the 'Add' or 'Revoke' option selected. 'Add' gives the person access, 'Revoke' removes the access.
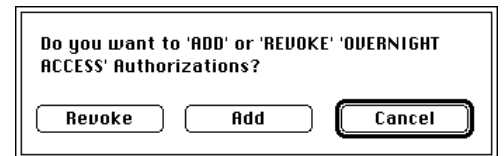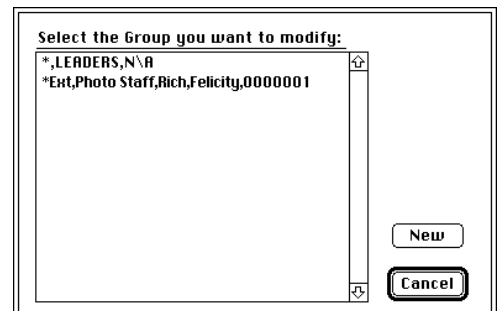

Group   'Group' will be dealt with in the next section.

Who ?   'Who ?' allows you to find the group that a person is on. You will have to provide the persons ID number and then you will be given a list of all the groups that the person is on to choose from.
(*Note*: In this context 'New' is disabled.)

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Group

Selecting the button 'Group' is how you access the groups already on file and create new ones.

Group

Selecting the button will present you with this dialog:

The list will display all 'Groups' currently on file.

A group can be selected by double clicking on it to go directly to the group card or by highlighting as in the example below.

You will note that the 'Cancel' button has become 'OK' and two more buttons have appeared, 'Delete' and 'Cancel'.

Selecting 'OK' will take you to the group card.

Selecting 'Delete' will allow you to delete the group.
(*Note*: You cannot delete a group if there are still people associated with it. Those people must be removed first. Removing people from groups is illustrated later in this chapter.)

Selecting 'Cancel' will abort the selection.

New Group

Selecting 'New' will allow you to create a new group and works as follows:

Group Type

Group Type is a pop-up menu that lets you decide what type of group it is. This menu will contain a list of all the active equipment codes, e.g. the letters that were activated under 'Equipment Codes...' in the 'System Setup' menu. It will also list three other items: '✱Ext', '◇Gen' and '@Spc'. These items all have special meaning:

'✱Ext' allows you to create new lists for 'Leaders' and 'Assistants'. Each group can only hold thirty (30) people and since these are the two main ones, they may be filled quickly. Multiple groups of the same type may be required.

'◇Gen' allows you to create special groups that give anyone entered on the card 'General' access.
(*Note*: This can be used to authorize people with 'General' access, and whose access you do not want to change, for authorized equipment. This can be any authorized equipment. This is used when you are running a restricted system.

For example:
You have a photo lab and all people in photo classes have 'Open' access. Everyone else has 'Restricted' access.
However you must allow another group of people to have access to the facility, but not full access.
Create a '◇Gen' class and put them on the list. This gives them 'General' access, they have access to any equipment on the list under 'General...' in the System Setup menu.
However they need access to one piece of authorized equipment that is a regular item.
Add that item to the group list, e.g. Color Darkroom.
Authorize the people on the list for it.
Everyone on the list has 'General' access but has special access to one authorized item.)

'@Spc' allows you to create special groups that makes no change to a persons access at all.
(*Note*: This is similar to '◇Gen' groups but anyone one added to this type of group does not have their access changed. So this can be used to authorize a person with restricted access for one piece of equipment, e.g. Color Darkroom, and that would be the only thing he/she could use with the exception of the equipment on the list under 'Restrictions...' in the System Setup menu. The authorized item must be on the list also.)

Any groups made with one of the equipment letter codes follow two rules:
1/ It gives the people on that group 'Open' access.
2/ They can be authorized for any equipment that uses that code and is an authorized item.

Group Name   Group Name can be used to designate what type of class or group it is, e.g. Beginning Color, or where it is located, e.g. 'MON6-9 ROOM 55'. Anything can be typed here with the exception of some characters which are reserved.
(*Note*: The name cannot be the same as one already on file.)

Group Leader ID #   Group Leader ID # must be a valid ID number that is currently in the system. This would be the person in overall control of the group, e.g. a teacher or faculty person.

(*Note*: The leader and assistant associated with a group cannot be on the group list.)

Group Assist. ID #   Group Assist. ID # must be a valid ID number that is currently in the system. This would be the person who assisted with the group, e.g. a teaching assistant. (*Note*: The leader and assistant associated with a group cannot also be on the group list. This item is optional and does not need to be supplied.)

To create a valid new group you must:

Set the group type ————————————————————— **P**
Supply some sort of group name ——————————————— **Photo 1**
Enter the ID number of the person leading group ————————— **0000000**
(Optionally enter the ID number of the person assisting the group.)

With this data supplied the system will create a new group card for that data:

(**Note**: These items can be changed at any time.)
You are now ready to create a group listing for this group type.

The on-screen buttons do the following tasks:

P-Photo 1

'P-Photo 1' is the name of the group. Whatever group you create or select will have its name in this location. You can use this to change the name of the group. You CANNOT change the letter code however.
(*Note*: You cannot rename the group to have the same name as one already on file.)

0000000

'0000000' is the ID number of the person who is the 'Leader' of the group. This can be can changed to any valid ID number. The name field will be updated to reflect the change.
(*Note*: You cannot use an ID number that is already on the group list or is the assistant.)

N\A

'N\A' is the ID number of the person who is the 'Assistant' for the group. This can be can changed to any valid ID number. The name field will be updated to reflect the change.
(*Note*: You cannot use an ID number that is already on the group list or is the leader.)

ID #:

'ID #:' is used to enter the ID numbers of people who are associated with the group. A dialog will be displayed to allow you to enter a persons ID number. This must be a valid ID number and currently on file. The persons name and ID number is then added to the list. The dialog is then displayed

Full Name:	ID #:
Bayless,Neal	0000001
Dietrich,Scott	0000002
Groeniger,Scott	0000003

again to allow you to enter a new ID number. This will repeat until you click 'Cancel'.
(*Note*: The list of people on the list is kept in alphabetical order, so as you add ID numbers they will appear at their appropriate location on the list, not necessarily at the bottom.)

Assigned Equipment:

'Assigned Equipment:' allows you to add equipment to the group card. It brings up the following dialog.
Codes: will list all the equipment codes that are applicable to the current group.
Authorization Items: will list all the equip-ment types that the current group can be authorized on.
Selecting 'All' will add all items to the card.

'Open' Authorization Equipment

Codes: Authorization Items:
P

COLOR DARKROOM
COMPUTER PERIPHERALS
COMPUTER STATION
COPY CAMERA GRAD
FLASHMAN
LEAFSCAN ROOM
POLAROID LENS
SLIDE PROJECTOR
SPEEDOTRON KIT
STROBE KIT

ALL   OK   Cancel

(*Note*: Items currently on the card are automatically omitted from the list so that you cannot select them twice.)

(*Note*: A card has a ninety-nine (99) item limit.)

Whatever items selected are automatically added to the card. The people on the card can then be authorized for them.

(*Note*: This example illustrates a card that has twelve (12) items on it. Notice that each equipment item line is numbered, e.g. '1,P-COLOR DARKROOM,A...'. These numbers match the '1' to '12' across the top of the screen. Up to ninety-nine (99) items can be added to a card. If more that twelve (12) are on the list then 'Equip -' and 'Equip +' button are provided at the bottom of the screen to page through the extra items and update the numbers at the top of the screen.)

To authorize someone for a piece of equipment takes two steps.

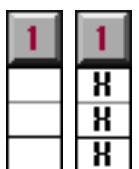1/ Denote that the person has to be authorized for the item.

2/ Actually authorize the person.

Step 1 can be done in several ways. If you click on one of the numbers '1' - '12' at the top the screen, you will see that an 'X' is placed in each square under that number beside each persons name.

An 'X' denotes that this person is to be authorized for this item.

(*Note*: If you hold the 'Option' key down while clicking again, all the 'X' will be removed. The card can be saved in this state.)

To authorize the person for the equipment you click 'Install'. All the 'X' on the card will be replaced with 'A'. 'A' denotes that the person is actually authorized for the item(s).
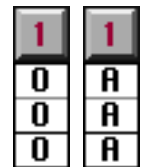
You can click on an individual square to assign an 'X'. Clicking on a single 'X' will also remove it.
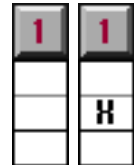
A similar set of rules apply when you want to revoke a persons authorization.

If you click on a number, e.g. '1', while holding the 'Option' key down, not only are any 'X' removed but all 'A' are changed to 'O'. An 'O' denotes an item that is going to be revoked.

Clicking the 'Install' button will revoke all 'O' items and replace the 'O' with a blank square. This denotes that the person is no longer authorized for the item(s).

The card can be saved in any state with any combination of 'X', 'A' and 'O' in place. Only when you select the 'Install' button does the ID cards of the people affected get updated.
(*Note*: Clicking on an individual 'A' will change it to an 'O'.)

You can remove a piece of equipment from the list simply by clicking on it. Doing that will also revoke any authorizations on file for that item, related to the current card.

(*Note*: When you authorize a person or revoke a persons authorization, the systems checks to see if the person is authorized for that item on any other card. Depending on what it finds, the persons ID card is updated accordingly, e.g. you can only have one authorization for each item on the persons ID card at one time. Similarly if a person is authorized for an item twice, on two different cards, then if the authorization on one card is revoked, the other is left in place as being valid.)

(*Note*: When you add a person to a group, or delete them from a group, the system checks their 'Access' status. This only affects a system that has 'Restrictions' turned on. When a person is added to group card his/her access is updated accordingly. The system checks to see if he/she is on any other cards and automatically assigns the best access for that person, e.g. if someone is on both an 'Open' access group and a 'General' access group, then he/she will have 'Open' assigned to their ID card. The same works in reverse when deleting them from a group card.)

Schedule:

'Schedule:' allows you to assign a time table of access for a group. Clicking the button will bring up this dialog. From here the access for this group can be set up for the whole week. The same schedule is used every week while it exists. You will be warned if you try and leave a card without setting a schedule. If no schedule is in place, then everyone on the current group will have no access. The access you set up is automatically overridden by the master dates and times that the system is open. That data is located under 'System Times...' in the 'System Setup' menu and 'Holidays...' which is located in the same menu.

The dialog allows you to setup a schedule that ranges from 'No Access', to '1 hr' to 'All Week'.

Clicking on 'All Week' will turn on ALL the time slots. 'Blank Week' turns them all OFF.
Similarly 'ALL' and 'None' turn ON and OFF the slots for the day currently selected. In this illustration, that is **'Mon'**day.
The time period buttons, e.g. '9 AM - Noon' will turn ON or OFF the slots for that time period on the selected day. It decides to turn them all ON or OFF by checking the status of the first one. If the first one is ON then they will all be turned OFF and vice versa.
Any day can be selected by clicking on the appropriate button: 'Mon' - 'Sun'.

'# of days in advance Reservation Limit:' controls how many days in advance the people on the group can make reservations.

Selecting 'OK' will update any changes made to the current group card.

(*Note*: People on multiple groups can have different schedules, e.g. Group 1, 9 - 4 on Mondays, Group 2, 6 - 9 on Wednesdays. This will result in that person having access for both those time periods.)

(*Note*: The Scheduling button may be missing from your group cards altogether. This will depend on the settings the System Operator has selected. Scheduling can be turned OFF using 'System Flags...' under the 'System Setup' menu.)

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