Daneizo
Quick Start / Documentation

Easy-to-use lending and asset management.

IntelliScanner
www.intelliscanner.com

License & Copyright

Please read the license agreement presented the first time you launch the software.

Introduction

Daneizo is a complete lending and asset management system. The Daneizo software application uses IntelliScanner technology to track items, members, and transactions between the two. Transactions are created by scanning member lending cards and item barcodes. Overdue e-mail reminders can be sent from within the application. Additional information on items, members, and transactions can be obtained using built-in and custom reports. Items and members can be easily imported and exported.

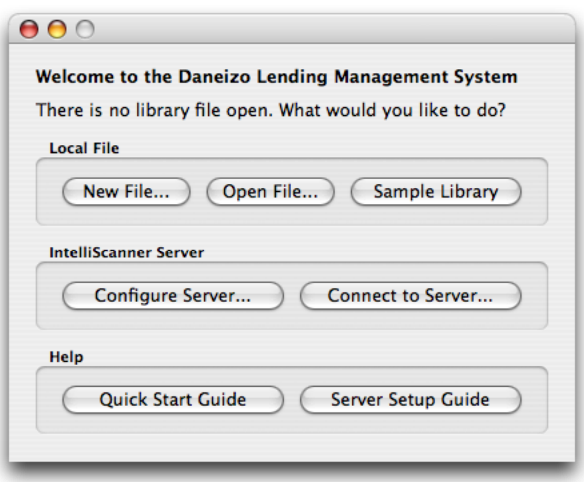
The Daneizo Lending Management System includes pre-printed asset tags and lending cards. All items and members should ideally be associated with barcode values for efficiency and ease-of use.

Installing

For Mac OS X, locate the Daneizo application and copy it to your Applications folder. For Windows, locate and launch *setup.exe* to install the software to your hard drive.

First Run

Double-click the Daneizo application to open it. The first time Daneizo is run it will indicate there is no library file open. If a library file is left open when Daneizo is quit it will automatically be reopened the next time Daneizo is run, otherwise this window will be displayed again.



New File…	Create and open a new library file.
Open File…	Open an existing library file. Daneizo 2.0 and later uses a newer database format than prior versions. Attempting to open an older database file will offer to copy the older data to a new database file.

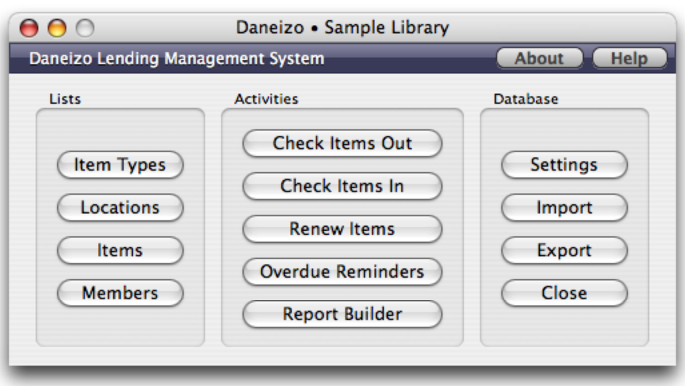
Sample Library	Open the sample library file. The sample library should not be used for lending management; it is for demonstration purposes only. The sample library can be modified. Unlike regular library files, if the sample library is left open when Daneizo is quit, it will not be automatically reopened the next time Daneizo is run.
Configure Server…	Options related to server connectivity are no longer supported.
Connect to Server…	Options related to server connectivity are no longer supported.
Quick Start Guide	Open the quick start guide.
Server Setup Guide	Options related to server connectivity are no longer supported.

Setup Assistant

The Setup Assistant window is displayed after creating a new library file. It provides the ability to edit the library settings, item types, locations, items, and members, all in the same window. Click the Next button to advance through the assistant. The functionality of the assistant can be accessed later from the Navigator window. Click the Skip button to close the assistant and proceed to the Navigator window.

Navigator Window

The Navigator window represents the open library file and provides quick access to the software's functionality.

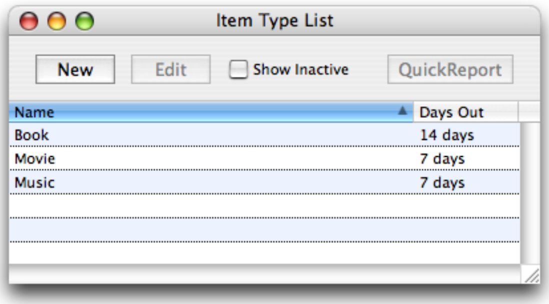


Item Types	Open the Item Type List window.
Locations	Open the Location List window.
Items	Open the Item List window.
Members	Open the Member List window.

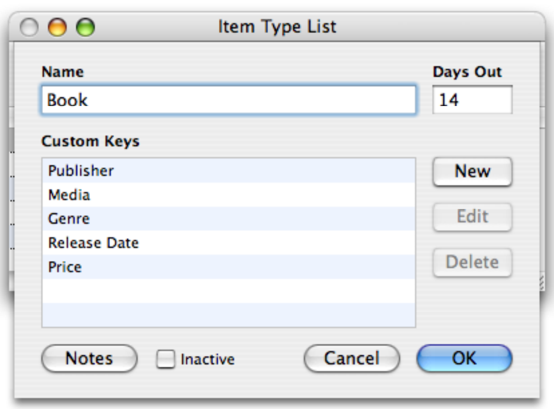
Check Items Out	Create a new transaction to check items out to a member.
Check Items In	Check in items from previous transactions.
Renew Items	Extend the due date for an existing transaction.
Overdue Reminders	Send reminders to members involved in overdue transactions.
Report Builder	Open the report builder window to create a custom report.
Settings	Edit the library file settings.
Import	Import a tab-delimited file of items or members.
Export	Open the Export Records dialog.
Close	Close the library file.

Item Type List Window

The Item Type List window displays the types of items that can be added to the library file and the default number of days they are lent out for. This window is opened by clicking the Item Types button in the Navigator window or by choosing Item Types from the Lists menu.



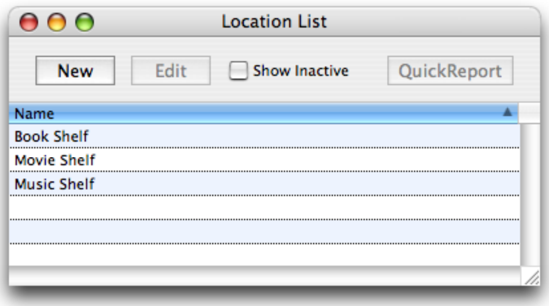
New	Add a new item type.
Edit	Edit the selected item type (shown below).
Show Inactive	Show active and inactive item types.
QuickReport	Generate a report of all items grouped by type.



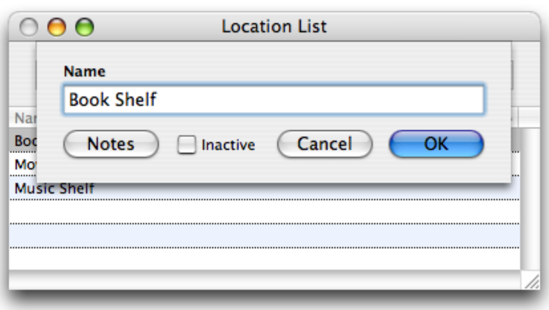
Name	The name of this item type.
Days Out	The default number of days that items of this type are lent out for.
Custom Keys	A list of custom data fields that can be used on a per-item basis.
New/Edit/Delete	Modify the list of custom data fields.
Notes	Edit the notes associated with this item type.
Inactive	Mark this item type as inactive. Item types cannot be deleted but can be removed from normal viewing by marking them as inactive.

Location List Window

The Location List window displays the locations that items can be associated with. This window is opened by clicking the Locations button in the Navigator window or by choosing Locations from the Lists menu.



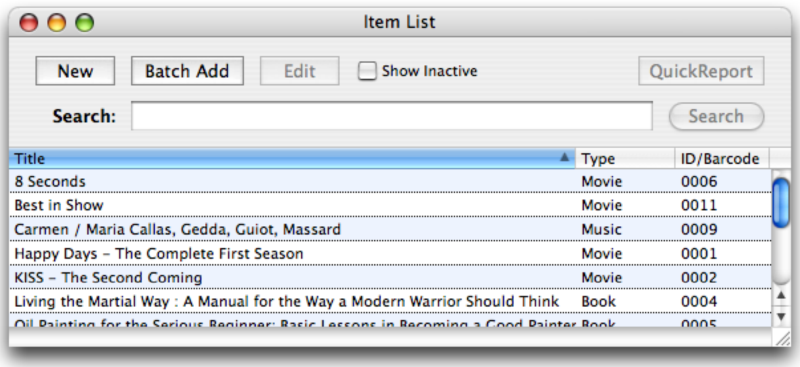
New	Add a new location.
Edit	Edit the selected location (shown below).
Show Inactive	Show active and inactive locations.
QuickReport	Generate a report of all items associated with the selected location.



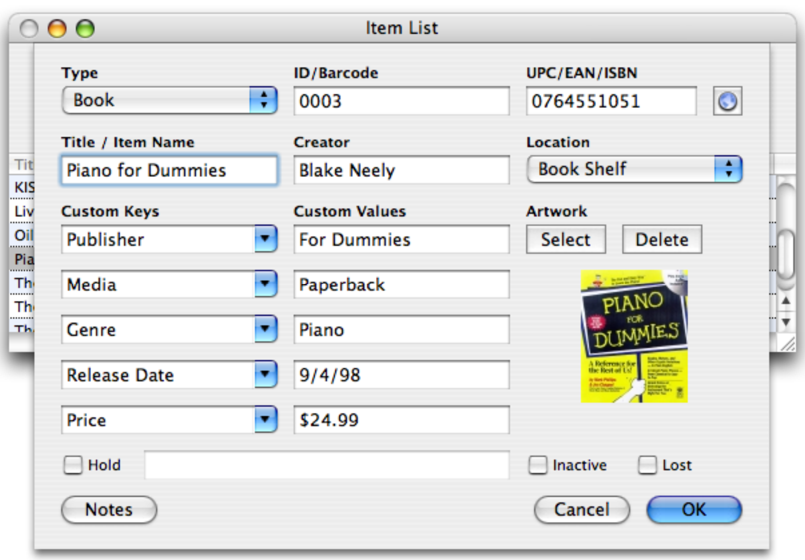
Name	The name of this location.
Notes	Edit the notes associated with this location.
Inactive	Mark this location as inactive. Locations cannot be deleted but can be removed from normal viewing by marking them as inactive.

Item List Window

The Item List window displays all items in the library file. This window is opened by clicking the Items button in the Navigator window or by choosing Items from the Lists menu.



New	Add a new item.
Batch Add	Add multiple items at once by scanning their barcodes and automatically filling in their information.
Edit	Edit the selected item (shown below).
Show Inactive	Show active and inactive items.
QuickReport	Generate a report of all transactions associated with the selected item.
Search	Filter the list of items by a query of keywords.

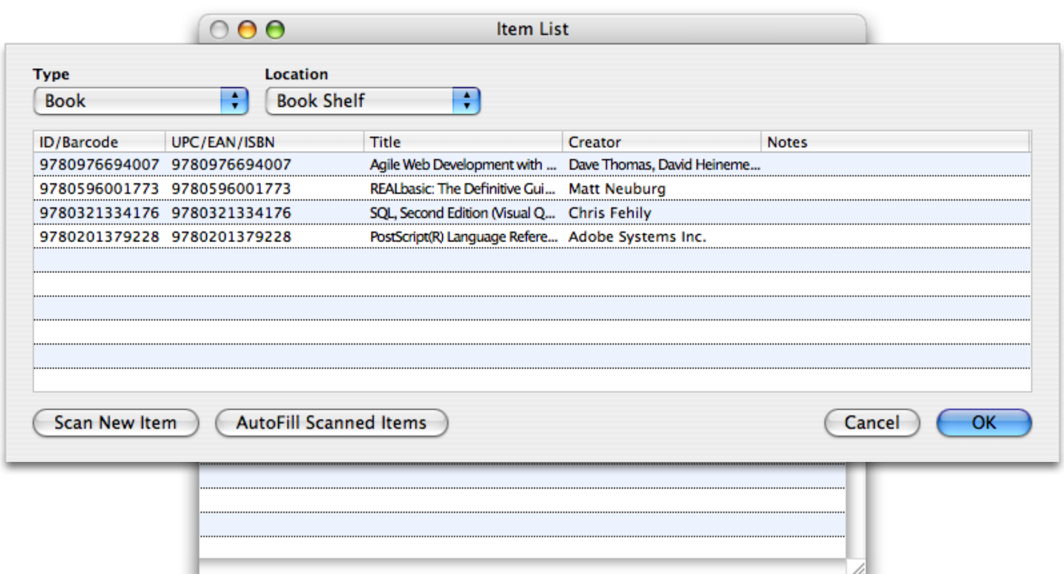


Type	The type of item. Item types are defined in the Item Types List window.
ID/Barcode	The barcode value associated with this item.

UPC/EAN/ISBN	An additional numeric value associated with this item. Click the button to the right of this field to attempt to automatically retrieve information on this item using this value.
Title	The title of this item.
Creator	The creator of this item.
Location	The location of this item. Locations are defined in the Location List window.
Custom Keys	Custom fields for this item. Default custom keys are defined in the Item Types List window.
Custom Values	Custom values for the custom keys.
Artwork	Click the Select button to specify a picture of this item. Click the Delete button to remove this picture.
Notes	Edit the notes associated with this item.
Hold	Mark this item as having a hold placed on it. Items with holds cannot be added to a check out transaction without removing the hold.
Inactive	Mark this item as inactive. Items cannot be deleted but can be removed from normal viewing by marking them as inactive.
Lost	Mark this item as lost.

Batch Add Window

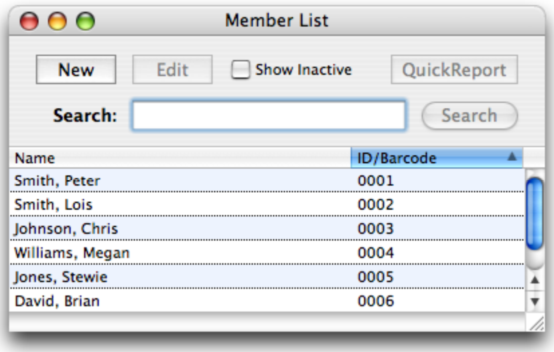
Multiple items can be added automatically using the Batch Add window. This window is opened by clicking the Batch Add button in the Item List window.



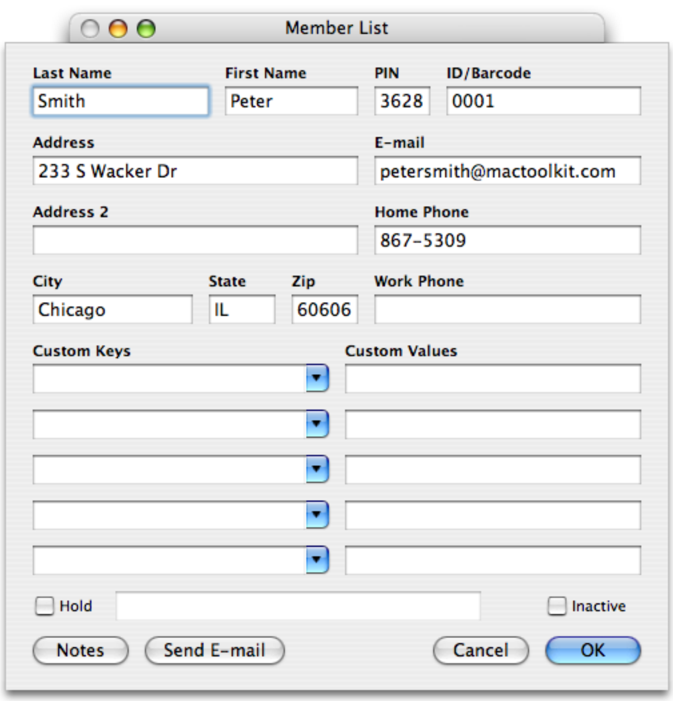
Type	The type of item being added.
Location	The location of the items being added.
Scan New Item	Create a new blank row to begin scanning barcodes. Two barcodes will need to be scanned for each item: the ID/Barcode (unique to this item, such as an asset tag), and the UPC/EAN/ISBN barcode (used for AutoFill).
AutoFill Scanned Items	Use Internet-enabled data sources to automatically fill in item information and artwork based on the UPC/EAN/ISBN barcode value.

Member List Window

The Member List window displays all members in the library file. This window is opened by clicking the Members button in the Navigator window or by choosing Members from the Lists menu.



New	Add a new member.
Edit	Edit the selected member (shown below).
Show Inactive	Show active and inactive members.
QuickReport	Generate a report of all transactions checked out by the selected member.
Search	Filter the list of members by a query of keywords.

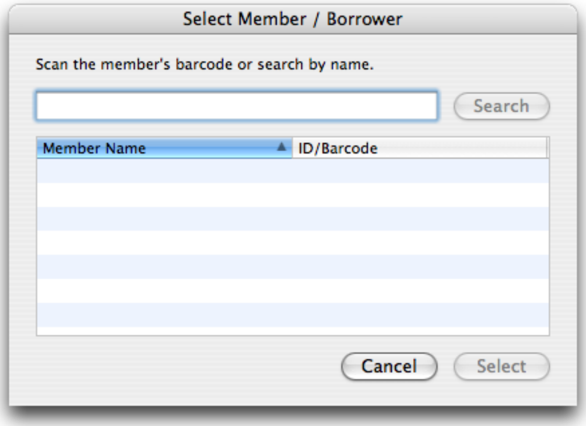


Last Name	The last name of this member.

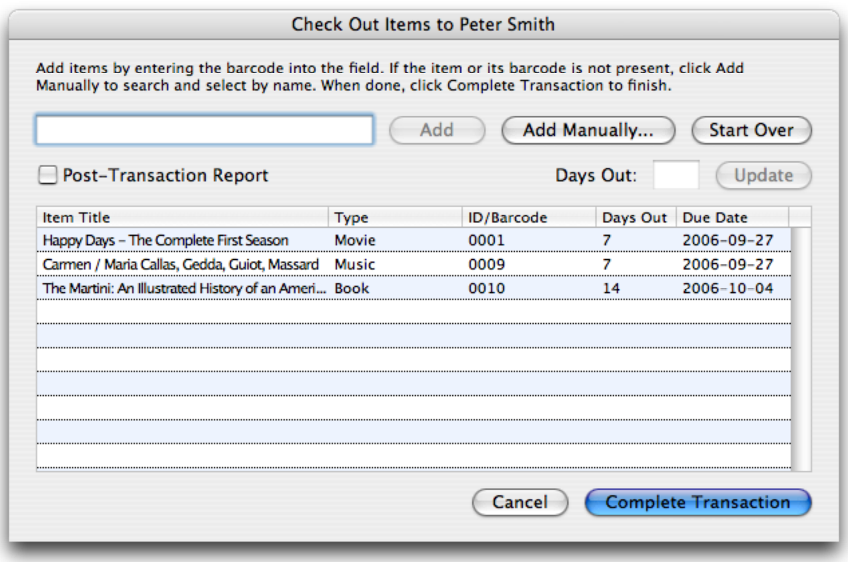
First Name	The first name of this member.
PIN	The personal identification number of this member.
ID/Barcode	The barcode value associated with this member.
Address	The first line of the address of this member.
Address 2	The second line of the address of this member.
City	The city of this member.
State	The state of this member.
Zip	The zip code of this member.
E-mail	The e-mail address of this member.
Home Phone	The home phone number of this member.
Work Phone	The work phone number of this member.
Custom Keys	Custom fields for this member. Default custom keys are defined in the database settings window.
Custom Values	Custom values for the custom keys.
Hold	Mark this member as having a hold placed on him or her. Items cannot be checked out to members with holds without removing the hold.
Inactive	Mark this member as inactive. Members cannot be deleted but can be removed from normal viewing by marking them as inactive. Attempting to check out items to an inactive member will show a warning.
Notes	Edit the notes associated with this member.
Send E-mail	Create a new e-mail message using the address in the e-mail field.

Checking Items Out

To check items out to a member click the Check Items Out button in the Navigator window or choose Check Items Out from the Activities menu.



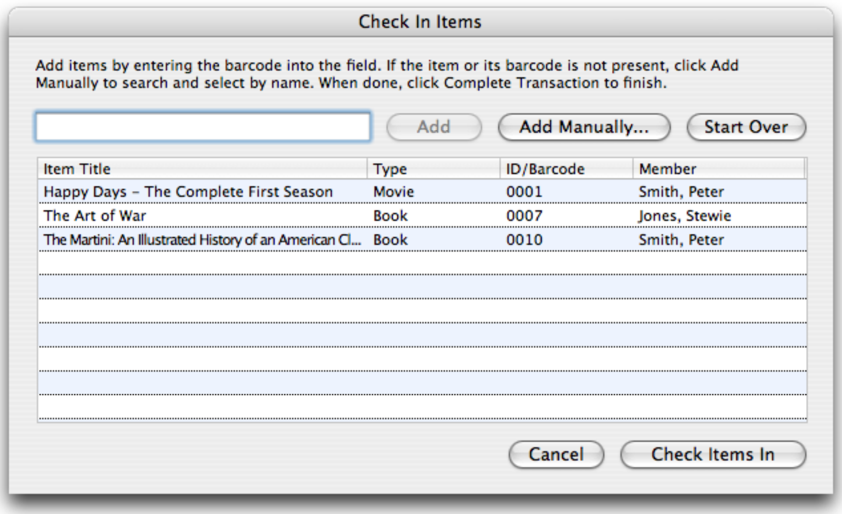
The Select Member dialog is displayed to specify to which member items are being lent. Scan the barcode associated with the member or enter part of their name to search.



Add	Scan item barcodes into the Add field, or enter the values manually and click the Add button, to add the items to the transaction.
Add Manually…	Add an item to the transaction by searching for it by name.
Start Over	Remove the scanned items from the transaction.
Post-Transaction Report	A transaction report will be generated for the member upon completion of the transaction if checked.
Days Out	To change the lending time of an item select it in the list, enter the new number of days out, and click the Update button.
Complete Transaction	Complete the transaction between the specified member and items.

Checking Items In

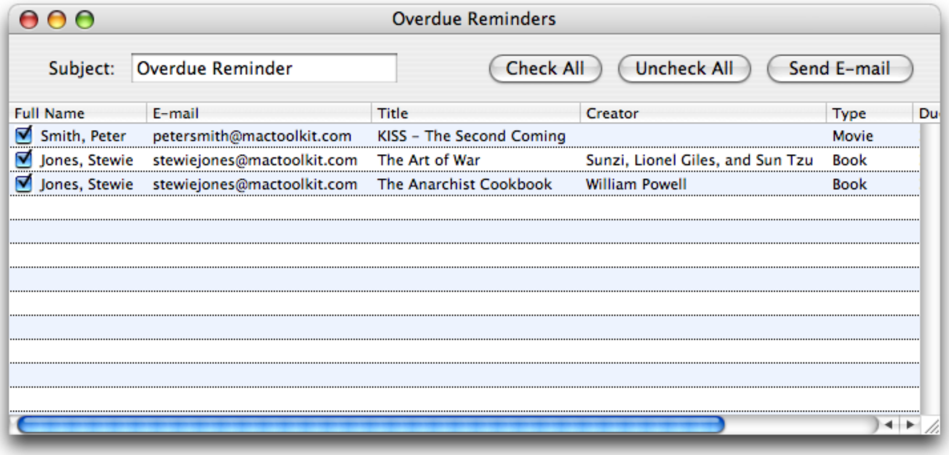
To check items in click the Check Items In button in the Navigator window or choose Check Items In from the Activities menu.



Add	Scan item barcodes into the Add field, or enter the values manually and click the Add button, to add the items to the list.
Add Manually…	Add an item to the list by searching for it by name.
Start Over	Remove the scanned items from the list.
Check Items In	Check the items in the list back into the system.

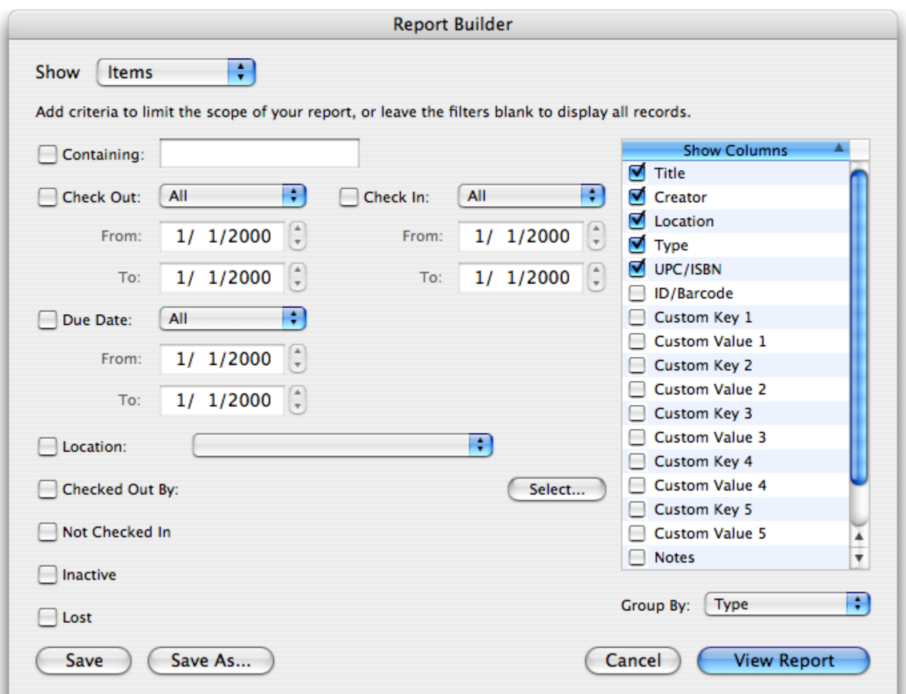
Sending Overdue Reminders

To send overdue reminders to members with overdue items click the Overdue Reminders button of the Navigator window or choose Send Overdue Reminders from the Activities menu. The Overdue Reminders window displays information on overdue items and the members they are associated with. Check off the items to send overdue reminders regarding and click the Send E-mail button to send. If a member has multiple checked overdue items they will receive a single message regarding the multiple items. The e-mail messages will be sent with the subject specified in the window and will appear to be from the e-mail address specified in the library file settings.



Custom Reports

To build a custom report click the Report Builder button in the Navigator window or choose Report Builder from the Reports menu. Reports return a list of items, members, or transactions. Reports can be saved for repeated viewing. Choose Custom Reports from the Reports menu for a list of previously saved custom reports.



Show	The type of report to build. Possible values are Items, Members, and Transactions.
Containing	Report results must contain these keywords.

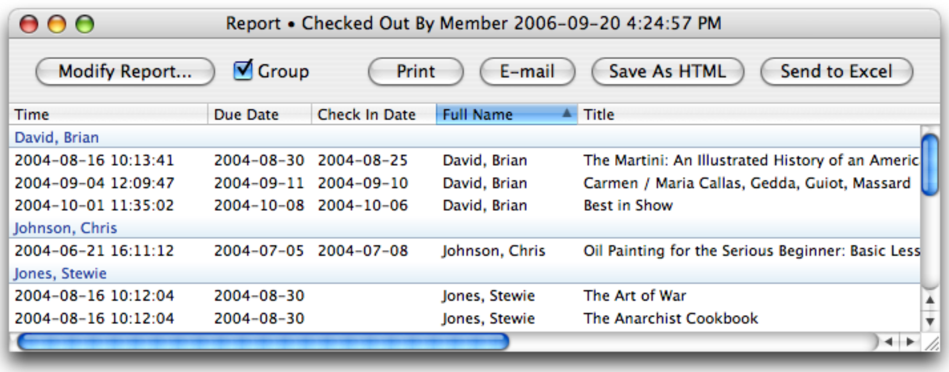
Check Out	Report results must be associated with a transaction checked out within the given date range.
Check In	Report results must be associated with a transaction checked in within the given date range.
Due Date	Report results must be associated with a transaction with a due date within the given date range.
Location (Items)	Report results must be items in the given location.
Checked Out By (Items)	Report results must be items checked out by the given member.
Not Checked In (Items)	Report results must be items that are not currently checked in.
Inactive (Items)	Report results must be items that are flagged as inactive.
Lost (Items)	Report results must be items that are flagged as lost.
Checked Item Out (Members)	Report results must be members that have checked out the given item.
Has item checked out (Members)	Report results must be members with items currently checked out.
Has overdue item out (Members)	Report results must be members with items currently checked out and overdue.
With lost items (Members)	Report results must be members who have checked out an item that was never checked in and is flagged as lost.
Inactive (Members)	Report results must be members that are flagged as inactive.
Checked Out By (Transactions)	Report results must be transactions that were checked out by the given member.
Containing Item (Transactions)	Report results must be transactions containing the given item.
Status (Transactions)	Report results must be transactions with the given status of Outstanding or Completed.
With overdue items (Transactions)	Report results must be transactions with overdue items.
With lost items (Transactions)	Report results must be transactions with lost items.
Show Columns	The columns to view in the report.
Group By	The column to group rows by in the report. Can be toggled in the report window.
Save	Save the custom report.
Save As…	Save a copy of the custom report.

Built-In Reports

Built-in reports can be accessed directly in the Items, Members, and Transactions submenus of the Reports menu. Alternatively, choose Built-In Reports from the Reports menu for a list of all built-in reports.

Report Viewer

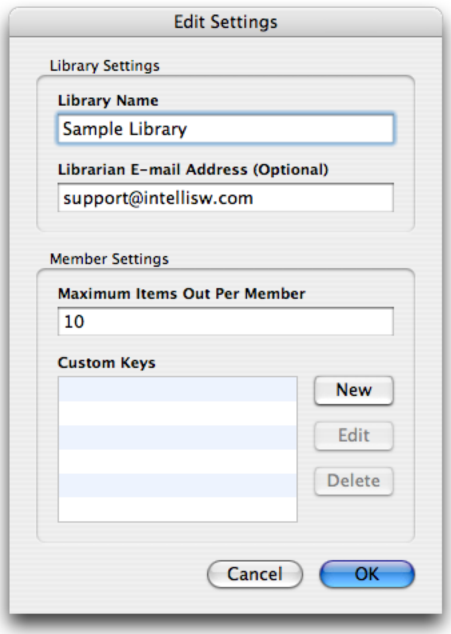
Built-in and custom reports are displayed in a report viewer window.



Modify Report…	Open the Report Builder window to modify the report criteria.
Show in Groups	Draw dividing rows to visually group rows that have the same value in the currently sorted column.
Print	Generate an HTML page or Excel worksheet that can then be printed.
E-mail	E-mail this report to a specified address.
Save As HTML	Save the report to an HTML file.
Send to Excel	View the report in Excel.

Settings

Click the Settings button in the Navigator window to edit the library file settings.



Library Name	The name of the library.
Librarian E-mail Address	The e-mail address of the library.
Maximum Items Out Per Member	The maximum number of items a member can have checked out at any given time.
Custom Keys	A list of custom keys to be used on a per-member basis. The first five keys will be the defaults for new member records.

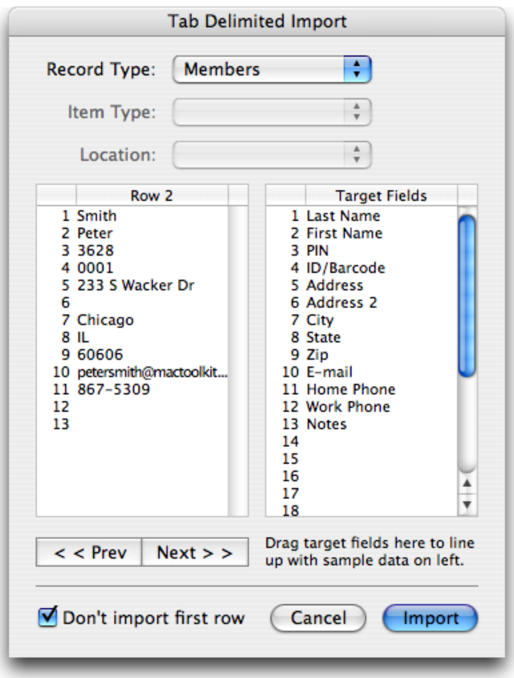
Exporting Records

Items and members can be exported to tab-delimited, CSV, and XML file formats. Click the Export button in the Navigator window or choose Export Records from the File menu.

Select the type of records to export, Items or Members, from the records menu. Select the desired file format from the format menu. Check off the fields to be included in the export. Click the Export button and specify a file name and location to save.

Importing Records

Items and members can be imported into the library from a tab-delimited file. Click the Import button in the Navigator window or choose Import Tab-Delimited File from the File menu. Select the tab-delimited file to open the import window.



Choose the type of record to import, Items or Members, from the Record Type menu. If importing items, choose the type and location of the items from the Item Type and Location menus. Drag the target fields so that they line up with the corresponding data in the tab-delimited file. Check the Don't Import First Row option if the file includes column headers in the first row. Click the Import button to begin.