

DOCUMENTATION

Equipment Management

Inventory Tracking

New Modify Delete Edit Give-Aways Print Rebuild About Exit

Team **GENERAL ISSUE**

Item	Size	Cost	On Hand	Received	On Order	Ordered	Out
ATHLETIC SUPPORTER	LARGE	1.5	100	02/09/99	0		0
ATHLETIC SU	XLARGE	1.5	99		0		1
BLUE SHORTS	LARGE	4.5	100		12	01/21/99	0
BLUE SHORTS	MED	4.5	50		0		0
BLUE SHORTS	XLARGE	4.5	100		0		0
BLUE SHORTS	XXL	4.5	50		0		0
CREW SHIRTS	LARGE	8.4	50		0		0
CREW SHIRTS	MED	8.4	50		0		0
CREW SHIRTS	XLARGE	8.4	100		0		0
CREW SHIRTS	XXL	8.4	100		0		0
GREY SHIRTS	LARGE	9.5	100		0		0
GREY SHIRTS	MED.	9.5	25		0		0
GREY SHIRTS	XLARGE	9.5	100		0		0
GREY SHIRTS	XXL	10.5	75		0		0
HAND SOAP	OSFA	1	20		0		0
HOODED TOPS	L	10.84	25		0		0
HOODED TOPS	M	10.84	25		0		0
HOODED TOPS	XLARGE	11.84	25		0		0
HOODED TOPS	XXL	11.84	25		0		0
LAUNDRY SOAP	OSFA	0.5	36		0		0
MESH BAGS	OSFA	0.4	35		0		0
SOCKS	OSFA	1.15	150		0		0

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I. Introduction

The PenSport *Equipment Management* software makes it easy to keep track of and organize your entire inventory. It is not just another inventory program; it is created with the input of the people who use it.

I.I Licenses

You must purchase a license for each machine on which you intend to install *Equipment Management*. Please contact **PenSport** to purchase additional licenses.

I.II Support

When you purchase *Equipment Management*, it comes with 30 days of free telephone support. After that, you may email or fax us for additional help.

Email: support@pensport.com

Fax: (610) 983 - 9548

You may buy a one-year support contract from us for an additional 20% of the cost of the *Equipment Management* version you purchased, with a current minimum charge of \$75. This support contract gives you an additional 10 support calls, as well as all software updates for an entire year. At the end of each support period, you will be given the option of renewing. If you decide not to renew, there will be an additional charge when you decide to purchase an upgrade. (The amount charged for additional support, and the details of the support contract, are subject to change.)

If you would like a custom support package, please contact **PenSport**.

1. Getting Started

1.1 Equipment Management Installation Procedure

The *Equipment Management Program* comes to you on several installation diskettes. To install the *Equipment Management Program* from diskette onto your computer perform the following steps:

Place diskette #1 into a disk drive.

Click *Start* on the Windows task bar to bring up the *Start Menu*.

Click the *Run* option on the *Start Menu*.

Enter "A:\Setup" (or B:, etc. if you are using a different disk drive for installation). You may also *Browse* the installation diskette to find and run the *SETUP.EXE* program file.

Follow the remaining installation instructions presented to you by the installation program.

1.2 Before Use

Before using *Equipment Management*, it will be necessary to call us for your *Security ID*. The *Security ID* will be different for every machine on which the software is installed. Without your *Security ID*, you will be able to create only minimal entries. If you lend your disks to another user for demonstration purposes, they will be limited also.

2. Running the Equipment Management Program

2.1 In Windows 95

To run the *Equipment Management Program*, click *Start* on the Windows task bar to bring up the *Start Menu*. On the *Start Menu*, click the *Programs* selection and find the *Equipment Management Program*. Both *Master Inventory* and *Individual Inventory* have the following icon if you open the folder:



Figure 2a

2.2 Mouse Buttons

Left Button Operation

The *Left Button* on the mouse is called the "Pick" button. Single clicking the *Left Button* on a menu item or screen button will execute the action associated with that menu item or screen button. Single clicking the *Left Button* on list items will select that item in the list.

Right Button Operation

The *Right Button* on the mouse is not used in the *Equipment Management* programs.

2.3 Equipment Management Programs

The *Equipment Management* software is made up of two main pieces that work together. They are *Master Inventory* and *Individual Inventory*. You can print data from within either one of these programs.

3. Master Inventory

Master Inventory will handle all data on the items contained within your inventory. It will allow you to keep track of items not only on hand, but what is on order, and from whom, as well as other information.

3.1 Master Inventory Screen

The Master Inventory screen is very simple. It contains data for all of your items listed by team.

General Issue will always be the first team in the team list. General issue is a special case. It is used to contain all items that are not specific to a team. For instance, if Grey T-shirts can be taken out by anyone on any team, they would be listed as general Issue. To change the list of *Teams*, please see section 3.5.

Menu Line

Team Selection

Inventory Tracking

New Modify Delete Edit Give-Aways Print Rebuild About Exit

Team GENERAL ISSUE

Item	Size	Cost	On Hand	Received	On Order	Ordered	Out
ATHLETIC SUPPORTER	LARGE	1.5	100	02/09/99	0		0
ATHLETIC SUPPORTER	XLARG	1.5	99		0		1
BLUE SHORTS	LARGE	4.5	100		12	01/21/99	0
BLUE SHORTS	MED	4.5	50		0		0
BLUE SHORTS	XLARG	4.5	100		0		0
BLUE SHORTS	XXL	4.5	50		0		0
CREW TOPS	LARGE	8.4	50		0		0
CREW TOPS	MED	8.4	50		0		0
CREW TOPS	XLARG	8.4	100		0		0
CREW TOPS	XXL	8.4	100		0		0
GREY T-SHIRTS	LARGE	9.5	100		0		0
GREY T-SHIRTS	MED.	9.5	25		0		0
GREY T-SHIRTS	XLARG	9.5	100		0		0
GREY T-SHIRTS	XXL	10.5	75		0		0
HAND SOAP	OSFA	1	20		0		0
HOODED TOPS	LARGE	10.84	25		0		0
HOODED TOPS	MED	10.84	25		0		0
HOODED TOPS	XLARG	11.84	25		0		0
HOODED TOPS	XXL	11.84	25		0		0
LAUNDRY SOAP	OSFA	0.5	36		0		0
MESH BAGS	OSFA	0.4	35		0		0
SOCKS	OSFA	1.15	150		0		0

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Item Information

Figure 3a

3.2 Add New Item

To add a new item to the inventory, select *New* on the menu line. You will then get an entry screen to add new items. The only fields you must fill out are Item, # Received and Date, and Titles. After all information is complete, click the OK button.

Add Item Drop Down List

Item

Size Cost . Used .

Received Date Storage Location

on Order Date

Ordered From: Out

PO # On Hand

Comment

Titles

COACH
EQUIPMENT MANAGER
PLAYER
TRAINER

Properties

DISPOSABLE

Figure 3b

3.2.1 Adding different sizes of the same item

You may have more than one item with the same *Item* name, as long as you are entering multiple sizes of that item. If you are entering another size of an item, select the *Item* from the drop down list instead of re-entering the item. Some properties must be the same for items that are of different sizes. They are Ordered From, PO#, Titles, and Properties.

3.2.2 Order Dates

To select the date an item has been ordered or received, click on the *Calendar Button*. You can adjust the *Month* and *Year* by clicking on the down arrow for their respective drop down list.

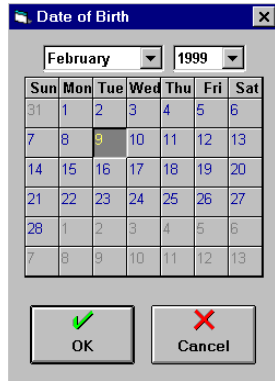


Figure 3c

3.2.3 Titles

The *Titles* define who is able to receive this item from the inventory. To select which *Titles* can receive this item, click on the eligible *Titles*. The *Titles* selected will stay highlighted. You define this list of *Titles*. To edit the list of *Titles*, see section 3.5.

3.2.4 Properties

The *Properties* help you define any special information about the item. Disposable is always available on the list. Select Disposable when you enter an item that you do not expect to be returned to the inventory. This field is used for information purposes only. To edit the list of *Properties*, see section 3.5.

3.3 Modify Items

To modify an existing item, select the item on the list by clicking on it, then press *Modify* on the menu line. *Double Clicking* on the item will have the same effect.

This screen looks very much like the screen for *New Item*. The only difference is that here you can use the *Previous* and *Next* buttons to go through the list of existing items. You can not add items on this screen.

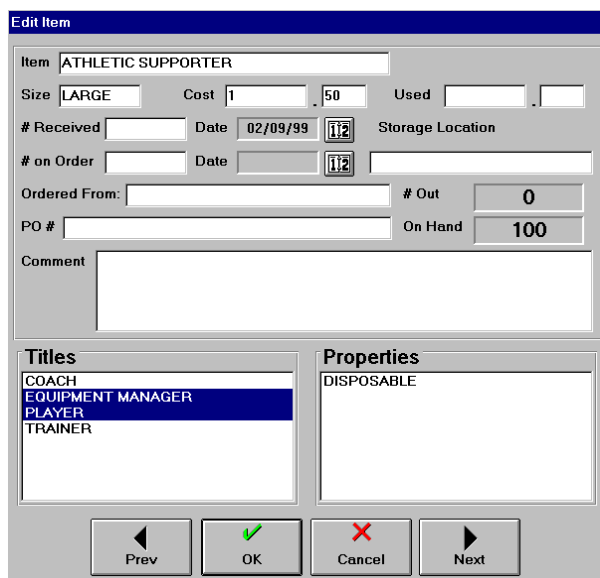


Figure 3d

3.4 Giveaways

If you are giving an item away to someone as a prize or gift, you can remove that item from the inventory by using the giveaway screens. You will still be able to get a report of items that were given away and to whom.

3.4.1 Giveaway

To give an item away, select *Give-Aways* and then *Give* on the menu line. You must fill out all of the information on the screen except for the *Budget Code*, it is optional. If an item is being taken from the inventory, select the *Sport*, *Item*, and *Size* from the drop down lists in that order. Otherwise, you can enter an item not already in your inventory by typing it into the *Item* field. When all information is complete, click the *OK* button.

The screenshot shows a dialog box titled "Giveaways". It has the following fields and controls:

- Name:
- Sport: (dropdown)
- Item: (dropdown)
- Size: (dropdown)
- Date: (calendar icon)
- Qty:
- Budget Code:
- OR Item:
- Buttons: (with green checkmark icon), (with red X icon)

Figure 3e

3.4.2 Delete Giveaway

If you made a mistake in a giveaway, select *Give-Aways* and then *Delete* on the menu line. A list of items given away will appear. Select the item to remove by clicking on it, and then click the *Delete* button. Click *Cancel* when you are done deleting items from the giveaways.

The screenshot shows a dialog box titled "Give Aways". It contains a table with the following data:

Name	Date	Item	Qty
JOHN JONES	5/7/99	BLUE SHORTS	1

At the bottom of the dialog are two buttons: (with trash can icon) and (with red X icon).

Figure 3f

3.5 Editing Titles, Properties, and Teams

By selecting *Edit* on the menu line, you have the ability to edit the list of items used for *Titles*, *Properties*, and *Teams*. After all changes are complete, make sure you click the *Done* button to save your changes. Clicking *Cancel* will just exit this screen.

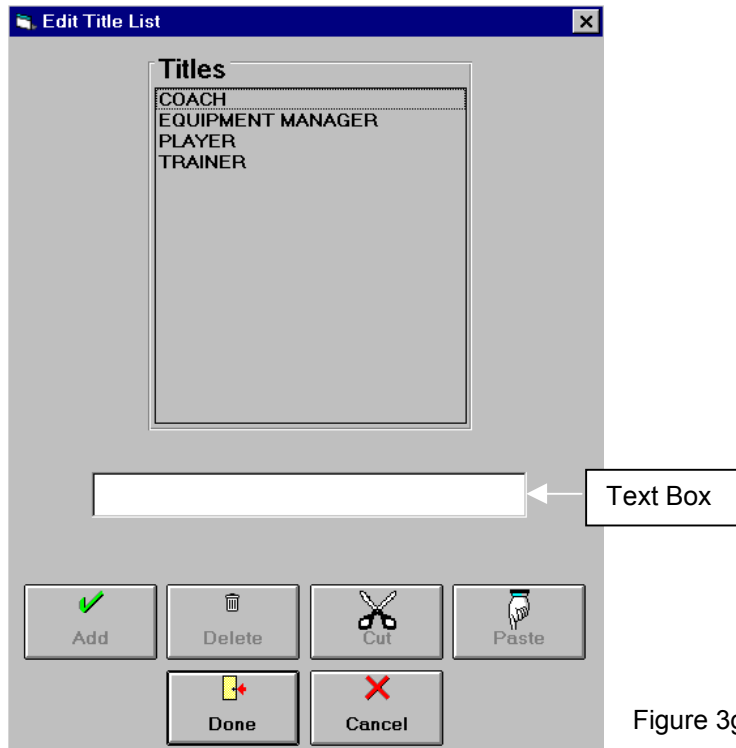


Figure 3g

3.5.1 Adding Items

Put the new item into the *Text Box* and click the *Add* button.

3.5.2 Deleting Items

Click on the item to be deleted in the list. The item will then appear in the *Text Box*. Click the *Delete* button to remove it from the list.

3.5.3 Reordering Items

Some lists can be sorted into an order you create; others will automatically be sorted alphabetically when you use them for selection in a drop down list. If you would like to sort a list that is not automatically sorted for you, do the following. Click on the item you wish to move, and it will appear in the *Text Box*. Click the *Cut* button. Then click on the item in the list you would like the cut item to appear in front of. Click the *Paste* button. The item will now appear in its new position.

Note: Make sure you click the *Done* button to save your changes.

3.6 Rebuild

This menu item is used to rebuild and compress the database. If you have had computer problems, or the program seems to be slowing down, press *Rebuild* to fix the database file.

4. Individual Inventory

Individual Inventory will be used to issue items to individuals who are authorized to have those items. It will take care of not only making sure a person can have a specific item, but it will also make sure the master inventory is properly maintained.

4.1 Individual Inventory Screen

The *Individual Inventory* screen will display the person's name and the items that person is authorized to receive from the inventory. The item list will change depending on the persons *Title*. (For more information on *Titles*, see section 3.2.3.)

Individual Inventory

New Save Modify Delete Search List Prev Next Print About Exit

Team: FOOTBALL

Name: Last: BORK, First: STEVE, MI: [empty]

Jersey: Home: 17, Away: 17

ID: 983218

Title: PLAYER

Buttons: Personal, Comment

Item	Size	Out	Issued	Date Iss.	Returned	Date Ret.	On Hand
ATHLETIC SUPPORTER	LARGE						100
ATHLETIC SUPPORTER	XLARG						100
AWAY JERSEY	L						12
AWAY JERSEY	XL						24
AWAY JERSEY	XXL						24
BLUE SHORTS	LARGE						100
BLUE SHORTS	MED						50
BLUE SHORTS	XLARG						100
BLUE SHORTS	XXL						50
CREW TOPS	LARGE						50
CREW TOPS	MED						50
CREW TOPS	XLARG						100

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Figure 4a

4.2 Adding A New Person

By clicking *New* on the menu line, all information will be removed, other than the selected team. You will then need to fill in all of the necessary information, including the person's *Title*. Click *Add* on the menu line once all of the information is complete.

Note: If you make changes to an existing person, the menu line will read *Save* instead of *Add*.

4.3 Finding A Person

There are two different ways to find a person on a team, Name Search or List Search. Once you have someone on the screen, you may use the *Previous* and *Next* menu items to change the person selected.

4.3.1 Name Search

If you know the first few letters of their last name, you can type them into the *Last Name* field and click *Search* on the menu line. If it finds a match, that name will automatically appear. If it finds more than one person, it will bring up the *List*.

4.3.2 List Search

To get a complete list of people in the system for a team, click *List* on the menu line. You have the ability to sort this list by *Last Name* or *Job Title*. To do so, just click on the column heading. Once the list is sorted, it will stay sorted in that order until you change it again.

To select a person, click on that person's name, and then click the *OK* button. Double clicking on that person's name will have the same effect.



Figure 4b

4.4 Deleting A Person

If you need to remove someone from the system, they must first have all of their items returned to the inventory. At that point, you can select that person, and just click *Delete* on the menu line.

4.5 Issuing and Returning Items

Once you have the person selected, you are ready to issue or return items. To select an item, click on the item from the list of valid items, and then click *Modify* on the menu line. Double clicking on the item will have the same effect.

Add Item

Item: **ATHLETIC SUPPORTER**

Size: **LARGE**

Issued: [] Date Issued: **02/09/99** [112]

Returned Unusable: [] Date Returned: **02/09/99** [112]

Returned to Inventory: [] Date Returned: **02/09/99** [112]

Master Info

On Order: **0**

On Hand: **100**

Out: **0**

Individual Info

Out: **0**

OK Delete Cancel

Figure 4c

4.5.1 Issuing Items

Once the *Add Item* screen appears, you are ready to issue the items. Just enter the *Number Issued*, make sure the proper date is showing, and click *OK*. You will see both the *Master Info* and *Individual Info* immediately updated. (For more information on how to change the date, see section 3.2.2)

If you need to issue other items, you can easily select them by using the drop down list for *Item* and *Size*. Always make sure to select the *Item* before selecting the *Size*. Once they are selected, the *Master Info* and *Individual Info* will be updated to show the proper item's inventory.

4.5.2 Returning Items

Once the *Add Item* screen appears, you are ready to return items. It works just like Issuing Items, except you put the number of items being returned in either the *Returned Unusable* or *Returned to Inventory* field. Click *OK* once that information is entered.

4.5.3 Clearing The Issued Dates

If a person has returned an item to the inventory, the record will still keep the dates as to when the item was last issued to that person, and when it was last returned. If you would like to clear this information out, press *Delete* on this screen when the *Individual Info Out* reads 0.

4.6 Personal Information

This screen will allow you to keep track of some personal information that will make your job easier. Besides some basic information that is set up for you, you can set up your own list of information that you would like to track. Once you are done entering information, click the *Save* button.

STEVE BORK

Campus/Local:
Address:

Phone:
Other: E-Mail:

Home/Permanent:
Address:

Phone:
Parents:

Personal
Date Of Birth: SSN:
Shoe Size: Shirt Size:
Pant Size: Preferred #

Other

- T-Shirts
- Shorts
- Shoe Size
- Sweat Pants
- Sweat Shirt
- Game Pants
- Helmet
- Face Mask
- Jaw Pads
- Chin Strap
- Sho. Pads
- Knee Pads
- Thigh Pads
- Jacket Size
- Shirt Size
- Glove Size

Changeable List

Save Cancel

Figure 4d

4.6.1 Setting Up The Other Column

Before you ever enter any information into the Personal Information, you need to set up your list of items to track in the *Other* column. Located in the folder where the application was loaded, by default c:\inventor, you will find a file called "items.txt". Inside this file is the list of up to 17 items that will be listed as *Other* on the *Personal* screen.

If you plan on using this list, it should be set up prior to entering any personal information. Once you have set it up, you should never change the list, only add to it. All items in this list must be within double quotes ("") and each item on its own line. The easiest way to edit this list is by using *Windows Notepad*. If you are not familiar with using *Notepad*, please refer to your *Windows* manual.

4.7 Comments

The *Comment* screen allows you to save any miscellaneous information that you may want. Pressing the Clear button will remove all comments.

Comment

Main

BORK, STEVE

Clear

Figure 4e

5 Printing

You can print from either Master Inventory or Individual Inventory. There are 9 basic reports that you can print to screen or to a printer. To select a report, click *Print* on the menu line. You will then see the following screen. Select the *Report* and *Destination* before pressing OK.

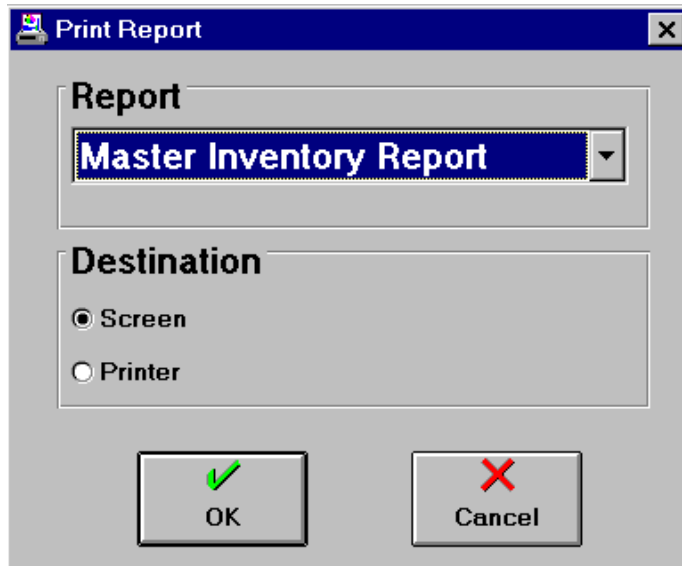


Figure 5a

5.1 Master Inventory Report

This report will display a list of items in the inventory with some basic information, for the selected team. To get a report on *General Issue*, you must print this report from within *Master Inventory* and have *General Issue* selected as your team.

5.2 Master Inventory Orders

This report is very similar to the Master Inventory Report, but includes the ordering information for the team's items.

5.3 Individual Inventory Report

By first selecting a person (see figure 5b) a report will be generated that shows all items the person has checked out.

5.4 Item Summary Report

By first selecting an item from the list (see figure 5c), you will get a report of who has the item checked out. To get a report on a *General Issue* item, you must print this report from within *Master Inventory* with *General Issue* selected as the team.

5.5 Cost Summary Report

This report is very similar to the Master Inventory Report, but includes detailed cost of the items that are on order.

5.6 Team List

Prints a list of who is on the selected team.

5.7 Comment Report

By first selecting a person (see figure 5b) a report will be printed with all the comments for that person.

5.8 Personal Report

By first selecting a person (see figure 5b) a report will be printed with all the personal information for that person.

5.9 Give-Away Report

A report will be generated which lists all items that have been given away from the inventory.

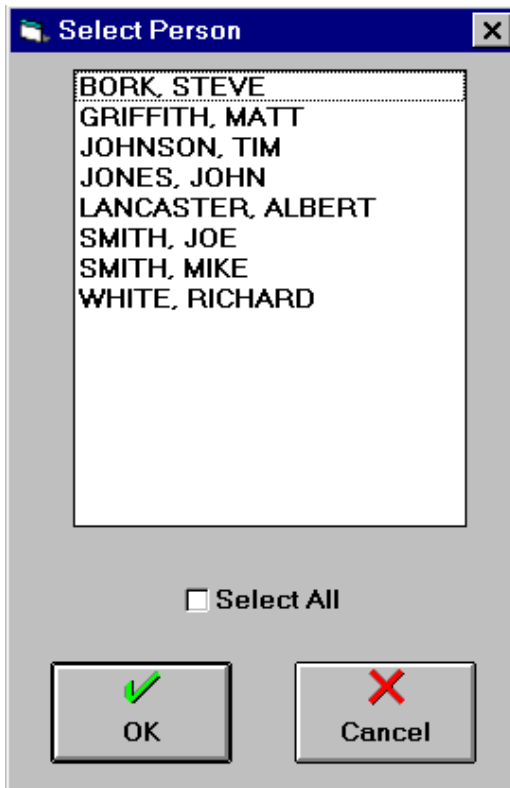


Figure 5b



Figure 5c

6 Options

There are several options that you should set up prior to using the *Equipment Management* software. All of these options are in the *Settings.ini* located in the same folder as the applications, by default c:\inventor. To change any of these settings, use Windows Notepad to edit the file. (If you need help using Notepad, please see your Windows user manual.) Each one of those options will be listed with an explanation of what it will change in the software. In each line of the *Settings.ini* file, there should never be any spaces.

6.1 PATH

By default; the database, reports, and text files are kept in the same folder as the executable software. If these pieces will exist on a network, you will need to change this option. The Path should be set to the folder where these files will exist.

For example: PATH=F:

Default: PATH=.

6.2 PASSWORD

If you would like to set a password for entry into the *Equipment Management* software, add the option to the *Settings.ini* file. By default there is no password.

For example: PASSWORD=PENSPORT

When you have set a password, you will see the following screen when you try to enter either application of the *Equipment Management* program.



Figure 6a

6.3 GENERALISSUE

In some cases, you may only have 1 team. In this case, you may not use *General Issue*. By changing this option, when you enter *Master Inventory* you will immediately see the first team, and not *General Issue*.

To use this option: GENERALISSUE=NO

Default: GENERALISSUE=YES

6.4 USETAGS

Some schools and teams like to have item *Tags* on their equipment to help with tracking. By doing so, when a player returns an item, you can really make sure the item he/she is returning is they item they were issued. This eliminates a person returning an item that is not theirs. Item *Tags* are never used on disposable items.

To use this option: USETAGS =YES

Default: USETAGS=NO

6.4.1 Master Inventory

When using *Tags*, the adding and editing of items in the *Master Inventory* changes. You will notice in Figure 6b and Figure 6c, that you now have a line listing the *Tags In* and *Tags Out*. *Tags In* is where you should list the item tags of all items in stock. You **MUST** place a comma between each tag when filling in the *Tags In* field. If you forget the comma, it will be considered as 1 tag. You also do not want to put spaces between *Tags*, or the space will be considered part of the *Tag*.

Add Item

Item

Size Cost . Used .

Received Date Storage Location

on Order Date

Ordered From: # Out

PO # On Hand

Comment

Tags In

Tags Out

Titles

COACH
EQUIPMENT MANAGER
PLAYER
TRAINER

Properties

DISPOSABLE

Figure 6b
Add Item

Edit Item

Item

Size Cost . Used .

Received Date Storage Location

on Order Date

Ordered From: # Out

PO # On Hand

Comment

Tags In

Tags Out

Titles

COACH
EQUIPMENT MANAGER
PLAYER
TRAINER

Properties

DISPOSABLE

Figure 6c
Edit Item

6.4.2 Individual Inventory

When issuing items in the *Individual Inventory*, if the item is not disposable, you will then be asked for the tag of the item or items being issued. If the tag is listed in *Tags Available*, then select it by clicking on it, and press the *Add* button. (Double clicking the tag will have the same effect.) It will then be placed in the *Tags Out* column. If for some reason, the tag is no listed in *Tags Available*, enter the tag in the *New* field, and press the *Add* button.

When returning items to inventory, you need to select the tag from *Tags Out* and press the *Remove* button. (Double clicking the tag will have the same effect.)

Before pressing the *OK* button, the number of tags in *Tags Out* must match the number of that item the person has checked out. You will get a warning if it does not match.

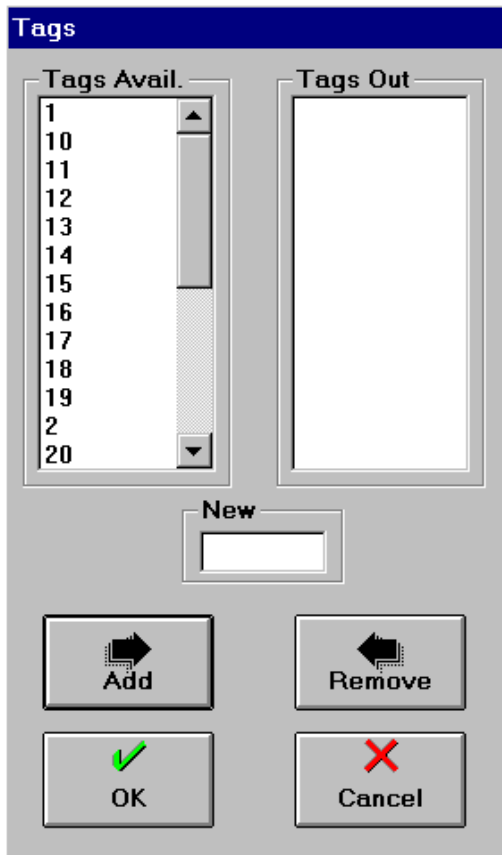


Figure 6d