Administrative Functions in the Booking Module
## Equinox Software, Inc.

The following documentation will include information about making cataloged items bookable; making non-bibliographic items bookable; and setting permissions in the booking module for staff.

## Make a Cataloged Item Bookable in Advance

If their permission settings allow, staff members can make items bookable. Staff members can do this in advance of a booking request, or they can do it on the fly.

If you know in advance of the request that an item will need to be booked, you can make the item bookable.

1. **In the staff client, select *Search* → *Search the Catalog***
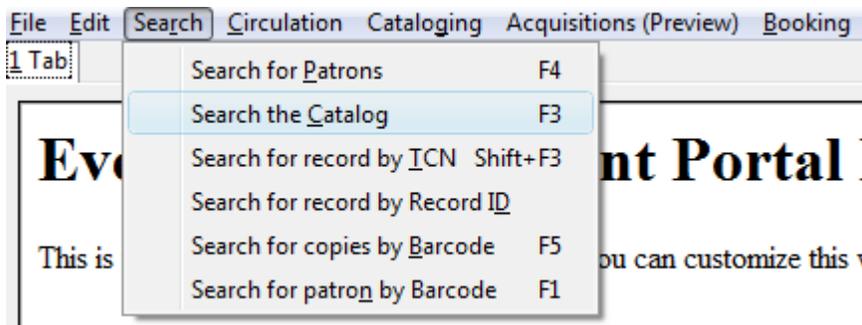
2. **Begin a title search to find an item.**
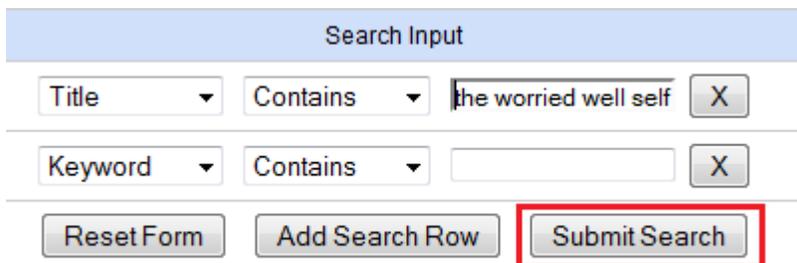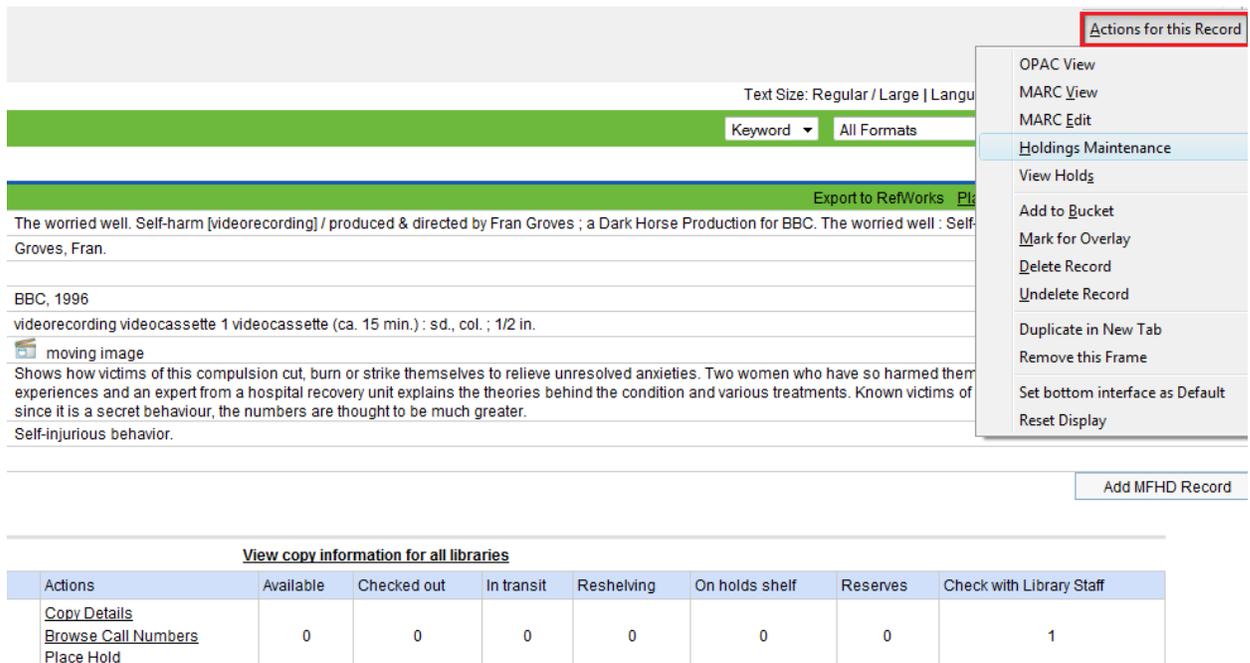

3. **Click the title of the item that you want to book.**

The worried well : Self-harm
Groves, Fran.
| BBC, 1996 | videorecording videocassette 1 videocassette (ca. 15 min.) : sd., col. ; 1/2 in.
Place Hold

4. The *Record Summary* will appear. In this view you can see information about the item and its locations. Click *Actions for this Record* → *Holdings Maintenance* in the top right corner of the screen.

5. The *Holdings Maintenance* screen will appear. In this screen, you can view the volumes and copies of an item avaialable at each branch. To view the barcodes and other information for each copy, click the arrow adjacent to the branch with the copy that you need to view. Click on successive arrows until you find the copy that you need to view.

6. **Select the item that you want to make bookable. Right click to open the menu, and click *Make Item Bookable*.**

7. **The item has now been added to the list of resources that are bookable. To book the item, return to the *Record Summary*, and proceed with booking.**

**Note: In this release, there is no way to make an item "unbookable" after it has been made bookable and has been reserved. The *Delete Selected* button on this screen deletes the resource from the screen, but the item will be able to be booked after it has been returned.**

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Make a Cataloged Item Bookable On the Fly

If a patron wants to book an item immediately that does not have bookable status, you can book the item on the fly if you have the appropriate permissions.

1. **Follow steps one through five in the section, Make Cataloged Items Bookable in Advance.**

2. **Select the item that you want to make bookable. Right click to open the menu, and click** *Book Item Now.*
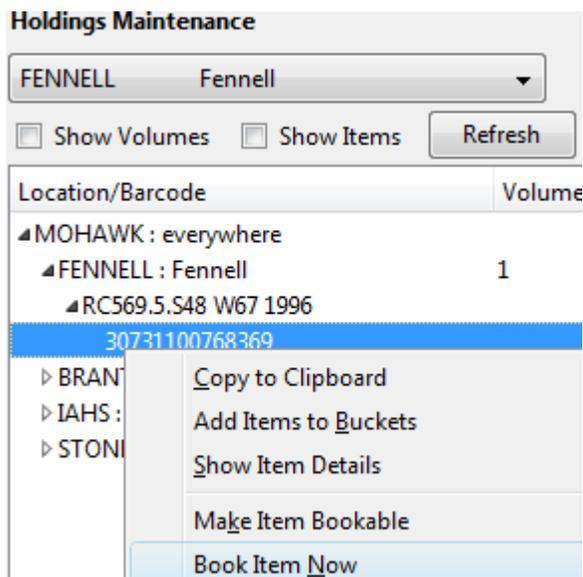
3. **A** *Reservations* **screen will appear in a new tab, and you can make the reservation.**

Create a Bookable Status for Non-Bibliographic Items

Staff with the required permissions can create a bookable status for non-bibliographic items. For example, staff can book conference rooms or laptops. You will be able to create types of resources, specify the names of individual resources within each type, and set attributes to describe those resources. You can then bring the values together through the Resource Attribute Map.

1. *First, create the type of resource that you want to make bookable.* **Select** *Admin →* *Server Administration → Booking →Resource Types***.**
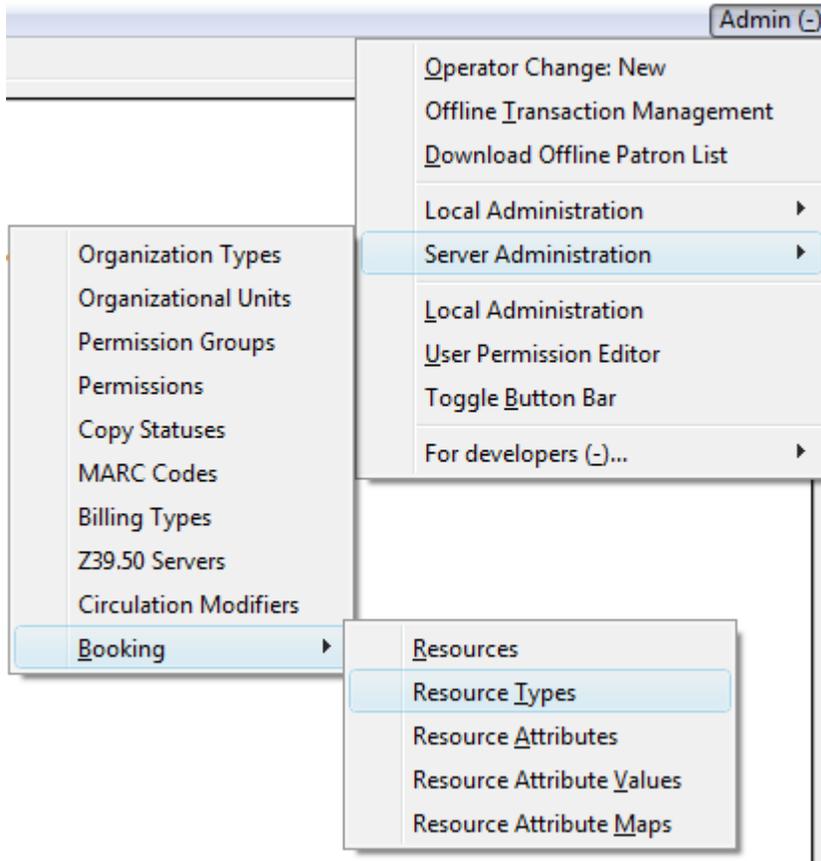
2. **A list of resource types will appear. You may also see titles of cataloged items on this screen if they were added using the *Make Item Bookable* or *Book Now* links. You should not attempt to add cataloged items on this screen; it is best to use the aforementioned links to make those items bookable. In this screen, you will create a type of resource.**

3. **In the right corner, click *New Resource Type*.**

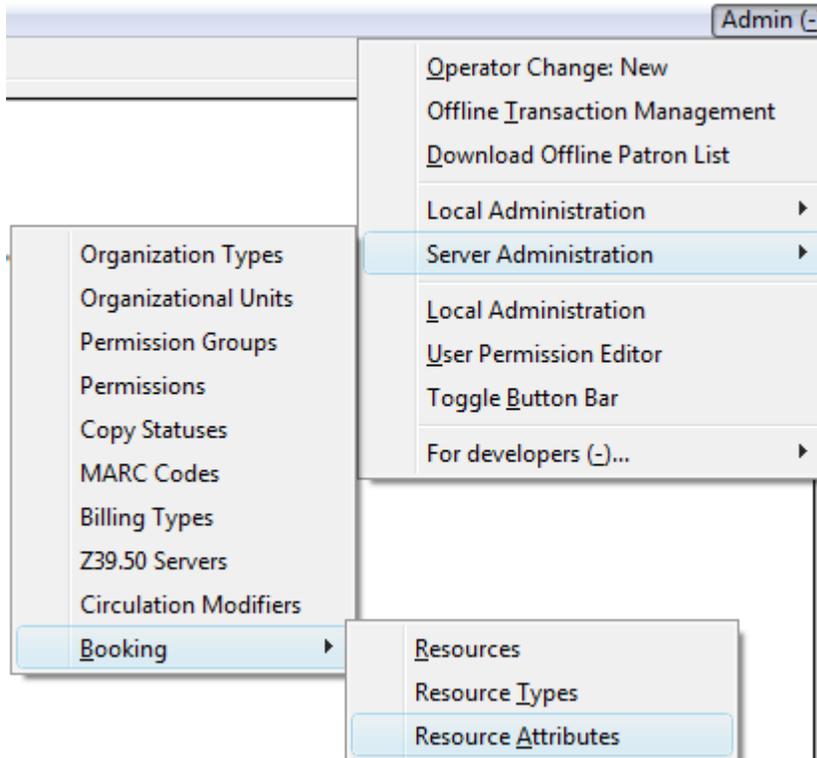4. **A box will appear in which you will create a type of resource. This example shows the creation of the resource type, Projector. In this box, you can set fines, determine "elbow room" periods between reservations on this type of resource, and indicate if this type of resource can be transferred to another library. Click *Save* when you have entered the needed information.**

	Resource Type Name	Projector	
	Fine Interval	1 day	
	Fine Amount	5.00	
	Owning Library	FENNELL	▼
	Catalog Item	☐	
	Transferable	☐	
	Bibliographic Record		▼
	Inter-booking and Inter-circulation Interval		
	Max Fine Amount	50.00	
	Cancel	Save	

5. **After you click Save, the box will disappear. Refresh the screen to see the item that you have added.**

	Positioning : how advertising shapes perception		0.00	FENNELL	True	True		
☐	Project management		0.00	FENNELL	True	True		
☐	Projector	1 day	5.00	FENNELL	False	False		50.00
☐	Room		0.00	FENNELL	False	False		0.00

6. **Next, set the attributes for the type of resource that you have created. Select *Server Administration → Booking → Resource Attributes.***
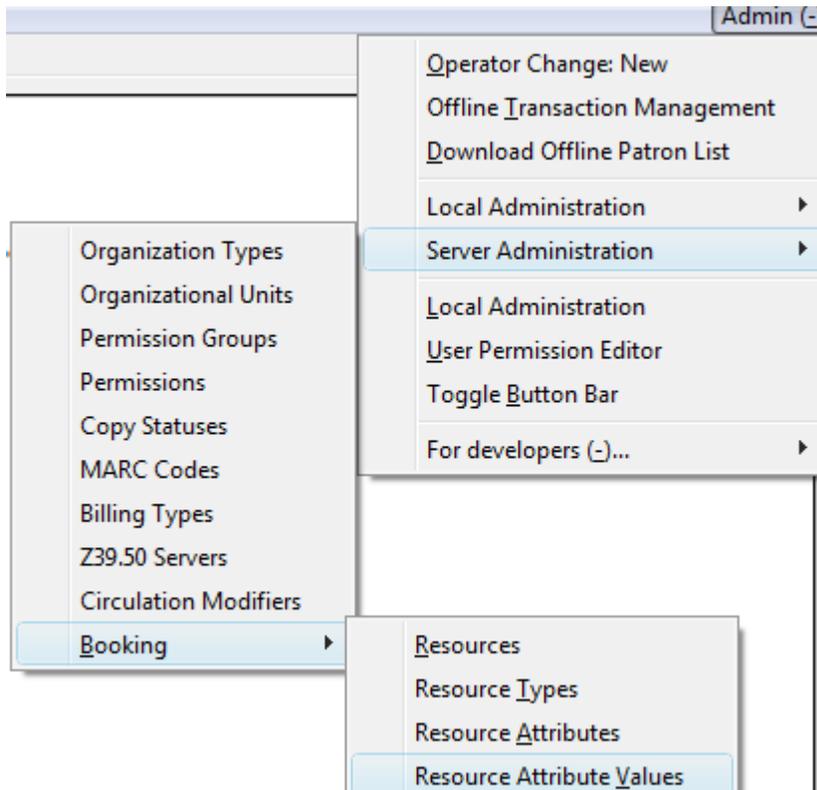
7. Click *New Resource Attribute*.

8. A box will appear in which you can add the attributes of the resource. Attributes are descriptive information that is provided to the staff member when the booking request is made. In this example, an attribute of the projector is the cart that allows for its transportation. Other attributes might be number of seats available in a room, or MAC or PC attributes for a laptop. Click *Save* when the necessary information has been entered.

9. **The box will disappear. Refresh the screen to see the added attribute.**

10. **Next, add the values for the resource attributes. A value can be a number, yes/no, or any other meaningful information. Select *Server Administration* → *Booking* → *Resource Attribute Values.***

11. **Select *New Resource Attribute Value*.**

12. **A pop up box will appear. Select the *Resource Attribute* from the drop down box. Add the value. You can add multiple values for this field.   In this example, a projector might come with a cart for transportation, so the value would be yes. If it does not come with a cart for transportation, the value is No. Click *Save* when the required information has been added.**

Owning Library	FENNELL ▼
Resource Attribute	Cart for Transportation ▼
Valid Value	Yes
Cancel	Save

Owning Library	FENNELL ▼
Resource Attribute	Cart for Transportation ▼
Valid Value	No
Cancel	Save

13. **If you refresh the screen, the attribute value may not appear, but it has been saved.**

14. **Next, identify the specific objects that are associated with this resource type. For example, the library may own two projectors. The resource type is projector, but each resource is identified by its own name. To identify individual resources, click *Admin* →*Server Administration* → *Booking* →*Resources.***
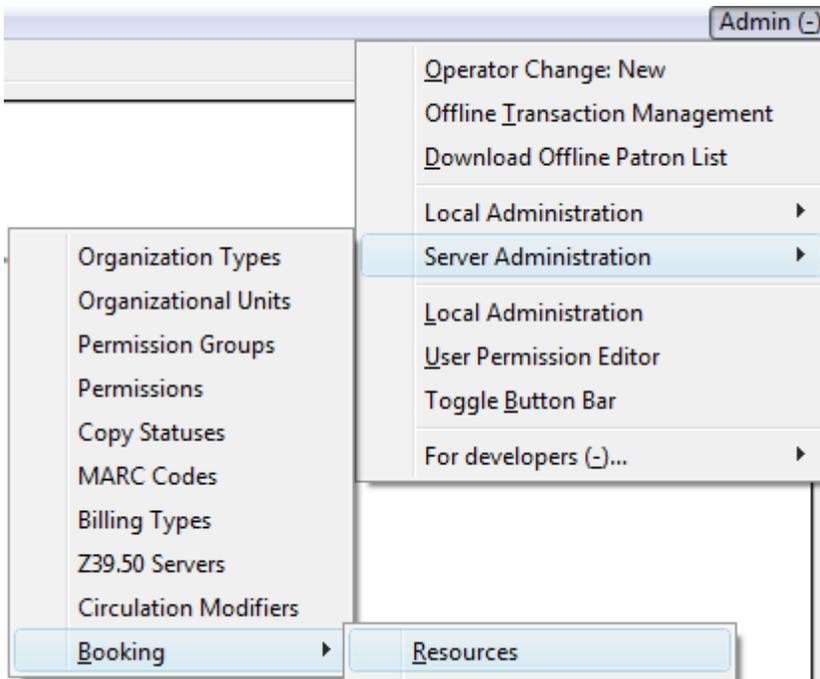
15. Click *New Resource*.

16. A pop-up box will appear. In this example, the library owns Projector A and Projector B. Add the information for Projector A, and click *Save*. Repeat this process for Projector B.

Owning Library	FENNELL ▼
Resource Type	Projector ▼
Barcode	Projector A
Overbook	☐
Is Deposit Required	✓
Deposit Amount	2.00
User Fee	
Cancel	Save

17. Refresh the screen, and the resource that you added will appear.

18. **Finally, use** *Resource Attribute Maps* **to bring together the resource and its attributes. Select** *Admin* →*Server Administration*→*Booking*→*Resource Attribute Maps***.**
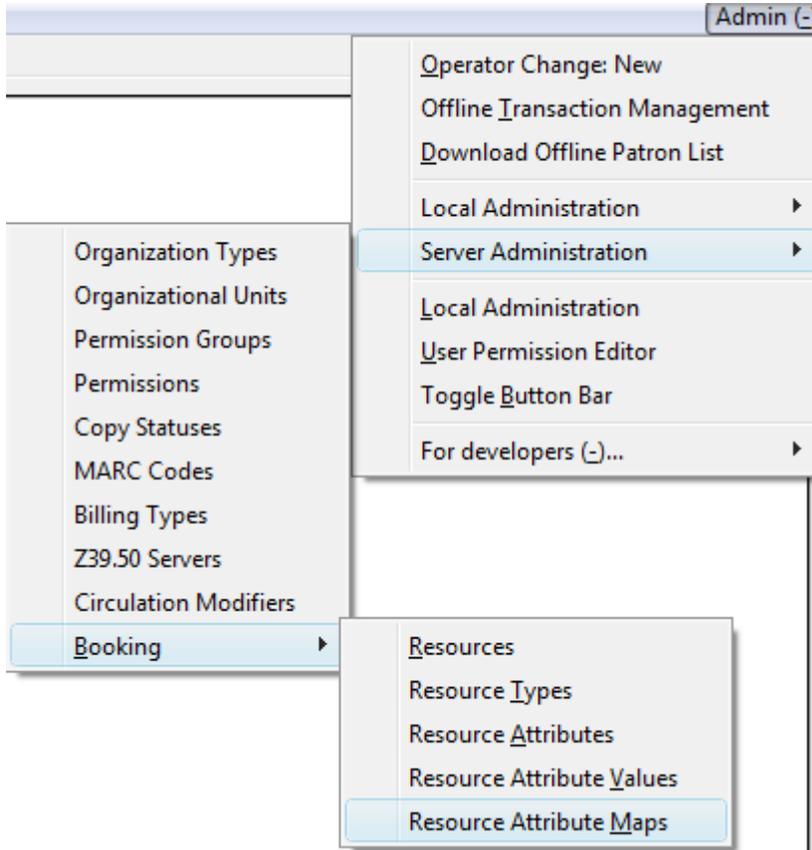
19. **Select** *New Resource Attribute Map*

20. **Select the resource that you want to match with its attributes. In this scenario, Projector A includes a cart for transportation, so you would select** *Yes* **for the attribute value. Click** *Save***. Projector B does not have a cart for transportation, so you would select** *No* **for the attribute value. Click** *Save* **when you have added the necessary information.**

Attribute Value	Yes ▼
Resource	Projector A ▼
Resource Attribute	Cart for Transportation ▼
Cancel	Save

Attribute Value	No ▼
Resource	Projector B ▼
Resource Attribute	Cart for Transportation ▼
Cancel	Save

21. **You have now created two bookable, non-bibliographic resources with their attributes.**
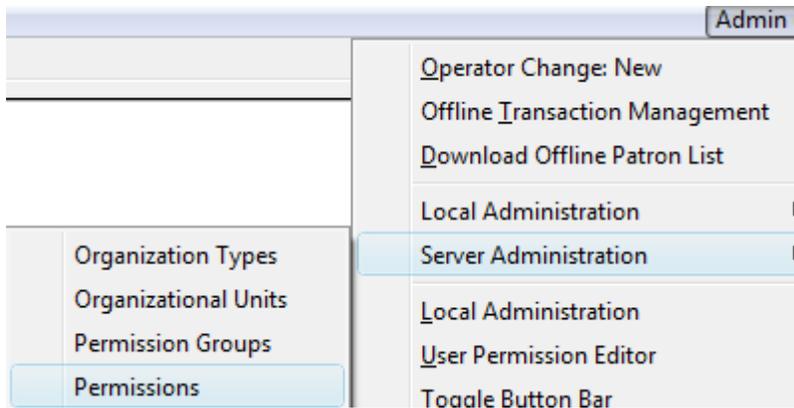
Setting Permissions

Administrators can set permissions so that staff members can view reservations, make reservations, and make bibliographic or non-bibliographic items bookable.

If a staff member attempts to book an item for which they do not have the appropriate permissions, they will receive an error message.

> The page at http://evergreen-server.mohawkcollege.ca says:
>
> ⚠ Error retrieving booking resource type
>
> ↵OK
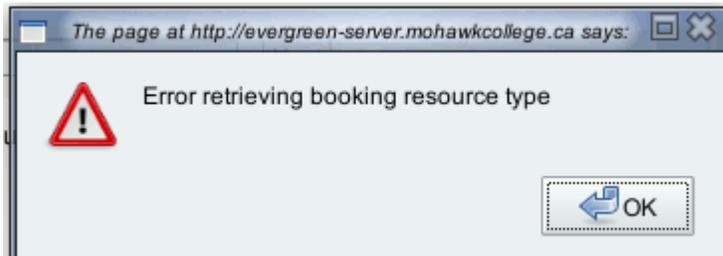
To set permissions, select **Admin → Server Administration → Permissions**.

Staff members should be assigned the following permissions to do common tasks in the booking module. These permissions could be assigned to front line staff members, such as circulation staff. Permissions with an asterisk (*) are already included in the **Staff** permission group. All other booking permissions must be applied individually.

View reservations: VIEW_TRANSACTION*

Use the pull list: RETRIEVE_RESERVATION_PULL_LIST

Capture reservations: CAPTURE_RESERVATION

Assist patrons with pickup and return: VIEW_USER*

Create, update, delete reservations: ADMIN_BOOKING_RESERVATION

The following permissions allow users to do more advanced tasks, such as making items bookable, booking items on the fly, and creating non-bibliographic resources for booking.

Create/update/delete booking resource type: ADMIN_BOOKING_RESOURCE_TYPE

Create/update/delete booking resource attributes: ADMIN_BOOKING_RESOURCE_ATTR

Create/update/delete booking resource attribute values: ADMIN_BOOKING_RESOURCE_ATTR_VALUE

**Create/update/delete booking resource:** ADMIN_BOOKING_RESOURCE

Create/update/delete booking resource attribute maps: ADMIN_BOOKING_RESOURCE_ATTR_MAP

In addition to having the permissions listed above, staff members will need a valid working

location, or home library, in their profiles. You can do this when you register a new staff member, or you can edit a staff member's existing record.

In this example, we will edit a current staff member's account to include a home library.

1. **Select** *Circulation* → *Search for Patrons*
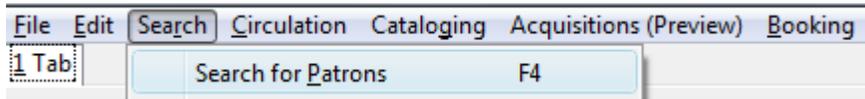
2. **Enter the staff member's last name and first name in the boxes on the left side of the screen, and click** *Search***. On the right side of the screen, select the staff member whose record you want to edit.**
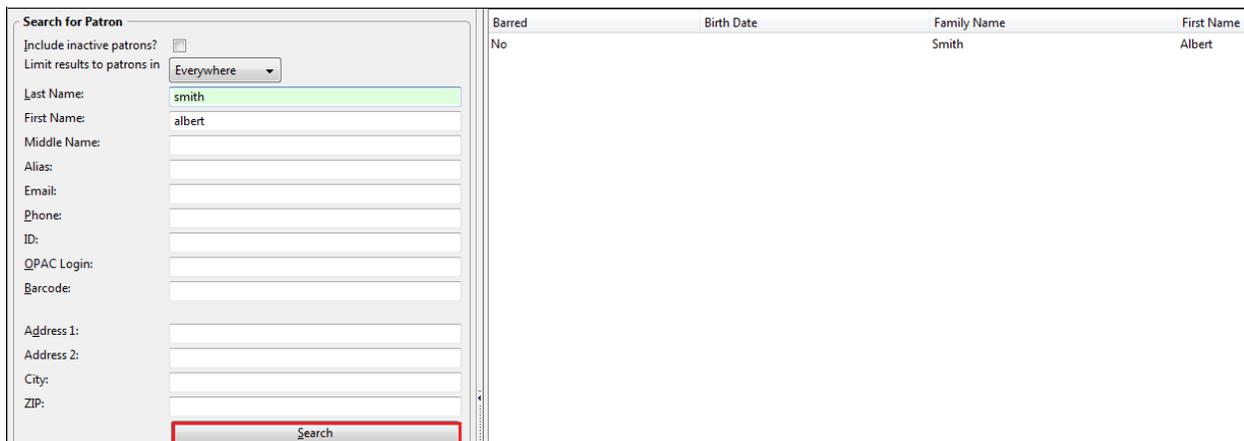
3. **Patron (or staff member) information will appear on the left side of the screen. To retrieve the patron's full record, click** *Retrieve Patron***.**
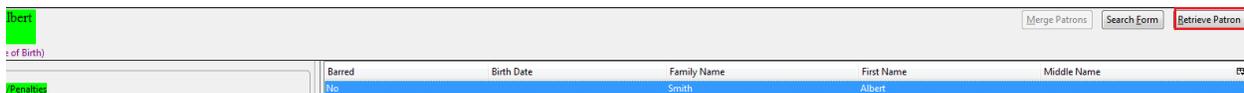
4. **The patron's record will appear. Click the** *Edit* **button.**
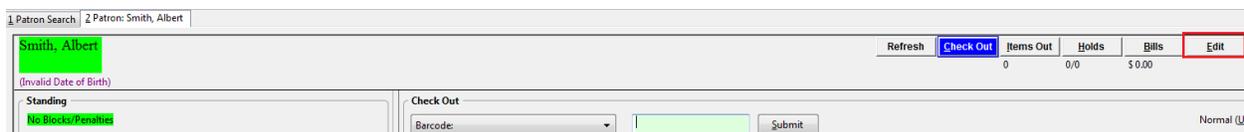
5. **The** *Evergreen User Editor* **will appear. Select** *Contact Info* **from the menu on the left side of the screen.**

6. **In the center of the screen, the staff member's contact information will appear, including the *Home Library*. Select the library at which the staff member works from the drop down box. Then select *Finish* from the menu on the left side of the screen.**

7. **You can now save your changes. Click *Save User*.**

8. **A message confirming the changes will appear. Click** *OK*.

9. **The screen will refresh to show the beginning of the patron record, the** *User Identification* **screen. Click** *Contact Info* **on the left to view the change to the** *Home Library* **field.**