

Administrative Functions in the Booking Module Equinox Software, Inc.

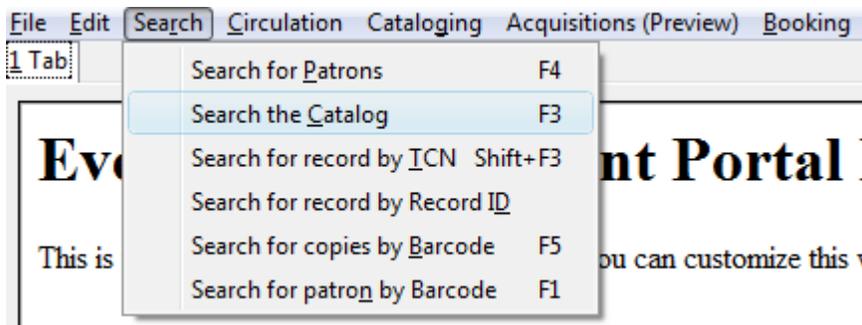
The following documentation will include information about making cataloged items bookable; making non-bibliographic items bookable; and setting permissions in the booking module for staff.

Make a Cataloged Item Bookable in Advance

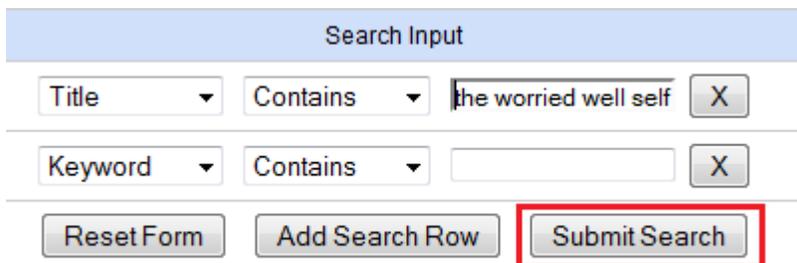
If their permission settings allow, staff members can make items bookable. Staff members can do this in advance of a booking request, or they can do it on the fly.

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.

A screenshot of the search input form. The form has a blue header 'Search Input'. Below it are two search rows. The first row has 'Title' selected in the dropdown, 'Contains' in the operator dropdown, and the text 'the worried well self' in the input field. The second row has 'Keyword' selected in the dropdown, 'Contains' in the operator dropdown, and an empty input field. At the bottom are three buttons: 'Reset Form', 'Add Search Row', and 'Submit Search'. The 'Submit Search' button is highlighted with a red border.

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

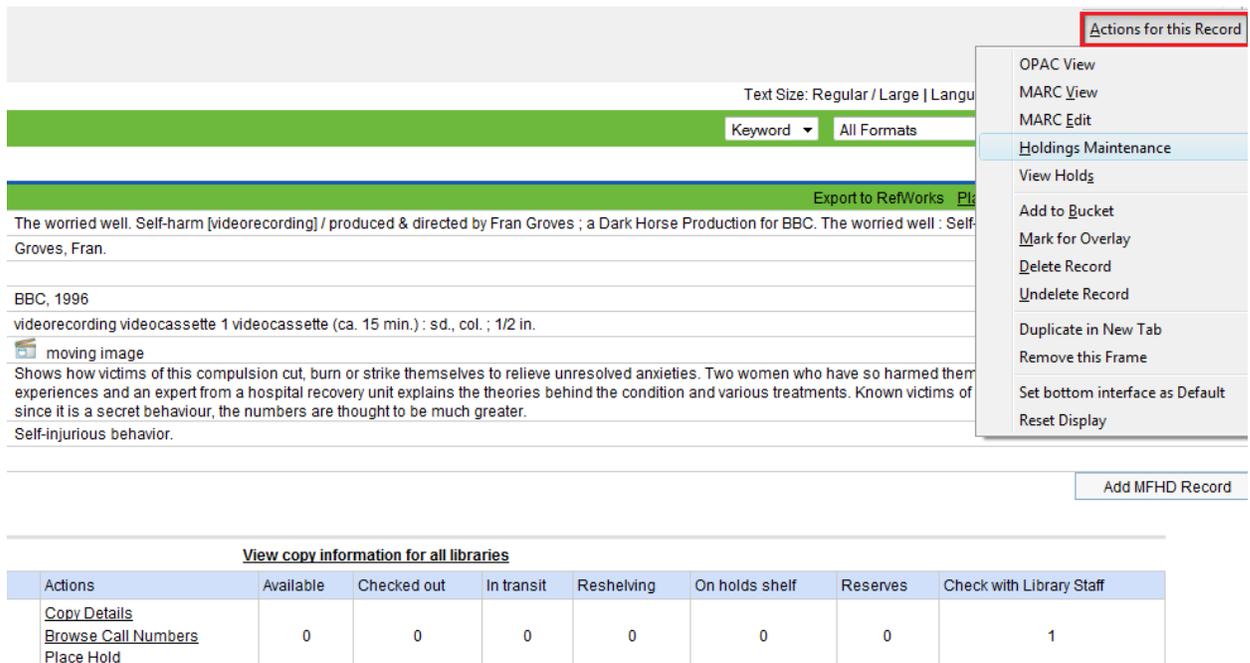
The worried well : Self-harm

Groves, Fran.

| BBC, 1996 | videorecording videocassette 1 videocassette (ca. 15 min.): sd., col. ; 1/2 in.



- 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.



The worried well. Self-harm [videorecording] / produced & directed by Fran Groves ; a Dark Horse Production for BBC. The worried well : Self-harm. Groves, Fran.

BBC, 1996
videorecording videocassette 1 videocassette (ca. 15 min.): sd., col. ; 1/2 in.

 moving image
Shows how victims of this compulsion cut, burn or strike themselves to relieve unresolved anxieties. Two women who have so harmed their experiences and an expert from a hospital recovery unit explains the theories behind the condition and various treatments. Known victims of since it is a secret behaviour, the numbers are thought to be much greater.
Self-injurious behavior.

Actions for this Record

- OPAC View
- MARC View
- MARC Edit
- Holdings Maintenance**
- View Holdings
- Add to Bucket
- Mark for Overlay
- Delete Record
- Undelete Record
- Duplicate in New Tab
- Remove this Frame
- Set bottom interface as Default
- Reset Display

Add MFHD Record

View copy information for all libraries

Actions	Available	Checked out	In transit	Reshelving	On holds shelf	Reserves	Check with Library Staff
Copy Details							
Browse Call Numbers	0	0	0	0	0	0	1
Place Hold							

- The **Holdings Maintenance** screen will appear. In this screen, you can view the volumes and copies of an item available 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.

Holdings Maintenance

FENNELL Fennell

Show Volumes Show Items

Location/Barcode	Volumes	Copies	Call Number
MOHAWK : everywhere			
FENNELL : Fennell	1	<1>	
BRANTFORD : Brantford	0	<0>	
IAHS : IAHS	0	<0>	
STONEYCRK : STARRT	0	<0>	

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

Holdings Maintenance

FENNELL Fennell

Show Volumes Show Items

Location/Barcode	Volumes	Copies	Call Number	Circulatio
MOHAWK : everywhere				
FENNELL : Fennell	1	<1>		
RC569.5.S48 W67 1996		1	RC569.5.S48 W67 1996	
30731100768369			RC569.5.S48 W67 1996	FENNELL

- Copy to Clipboard
- Add Items to Buckets
- Show Item Details
- Make Item Bookable

- 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.

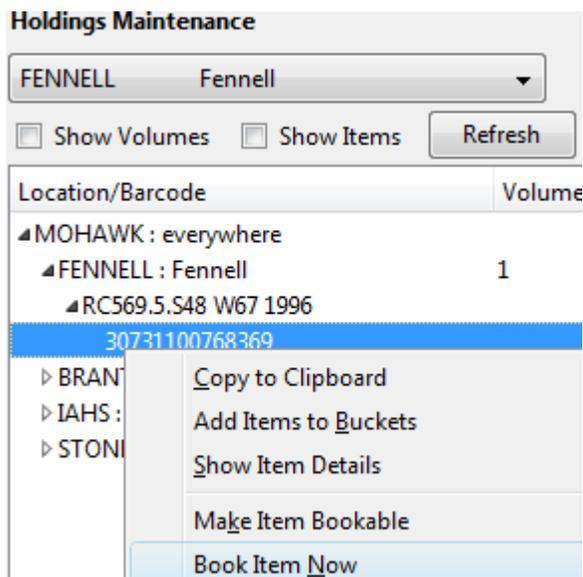
Resources					
<input checked="" type="checkbox"/>	Owning Library	Resource Type	Barcode	Overbook	Is Deposit Required
<input type="checkbox"/>	FENNELL	The worried well : Self-harm	30731100768369	False	False

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.

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**.

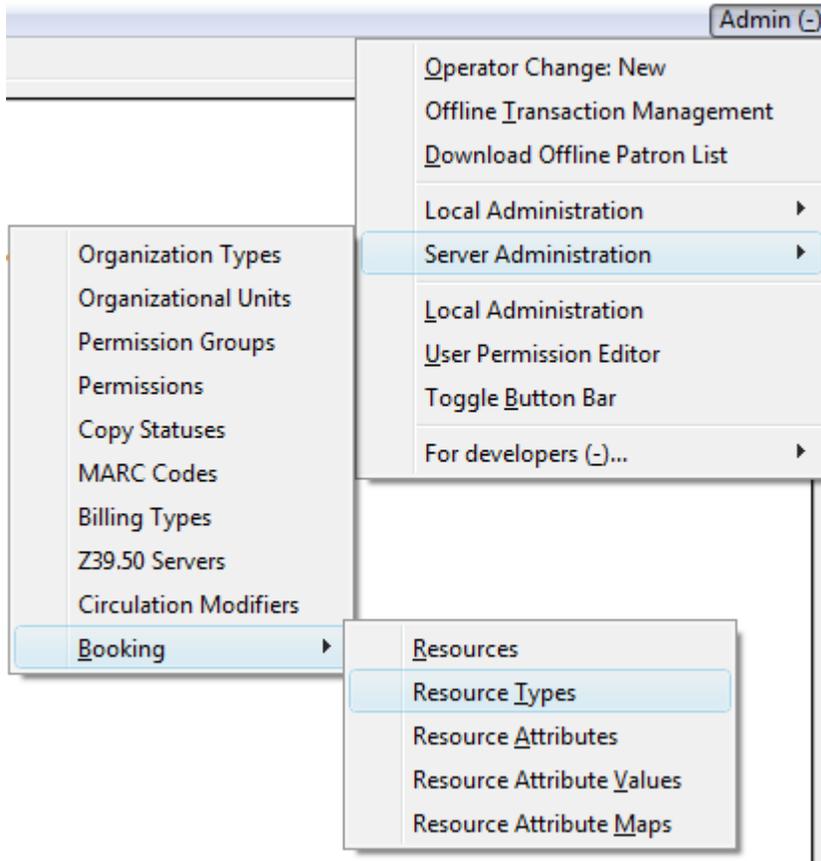


3. A **Reservations** screen will appear in a new tab, and you can make the reservation.

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*.



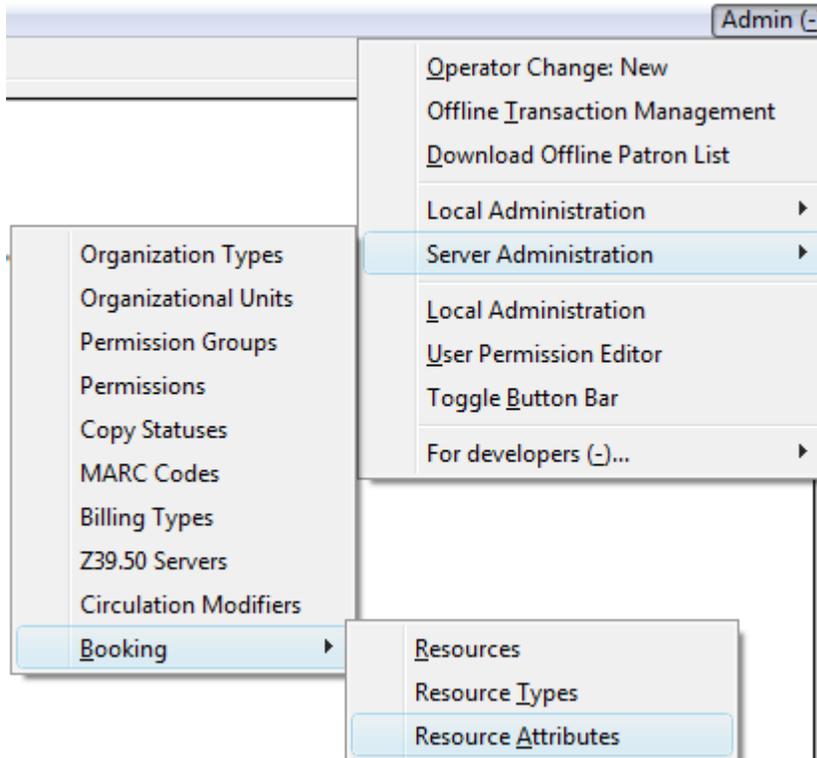
4. A box will appear in which you will create a type of resource. This example shows the creation of the resource type, Projector. In this box, you can set fines, determine “elbow room” periods between reservations on this type of resource, and indicate if this type of resource can be transferred to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

Resource Type Name	<input type="text" value="Projector"/>
Fine Interval	<input type="text" value="1 day"/>
Fine Amount	<input type="text" value="5.00"/>
Owning Library	<input type="text" value="FENNELL"/> ▼
Catalog Item	<input type="checkbox"/>
Transferable	<input type="checkbox"/>
Bibliographic Record	<input type="text"/> ▼
Inter-booking and Inter-circulation Interval	<input type="text"/>
Max Fine Amount	<input type="text" value="50.00"/>
<input type="button" value="Cancel"/>	<input type="button" value="Save"/>

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

<input type="checkbox"/>	Positioning : how advertising shapes perception	0.00	FENNELL	True	True		
<input type="checkbox"/>	Project management	0.00	FENNELL	True	True		
<input checked="" type="checkbox"/>	Projector	5.00	FENNELL	False	False		50.00
<input type="checkbox"/>	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*.

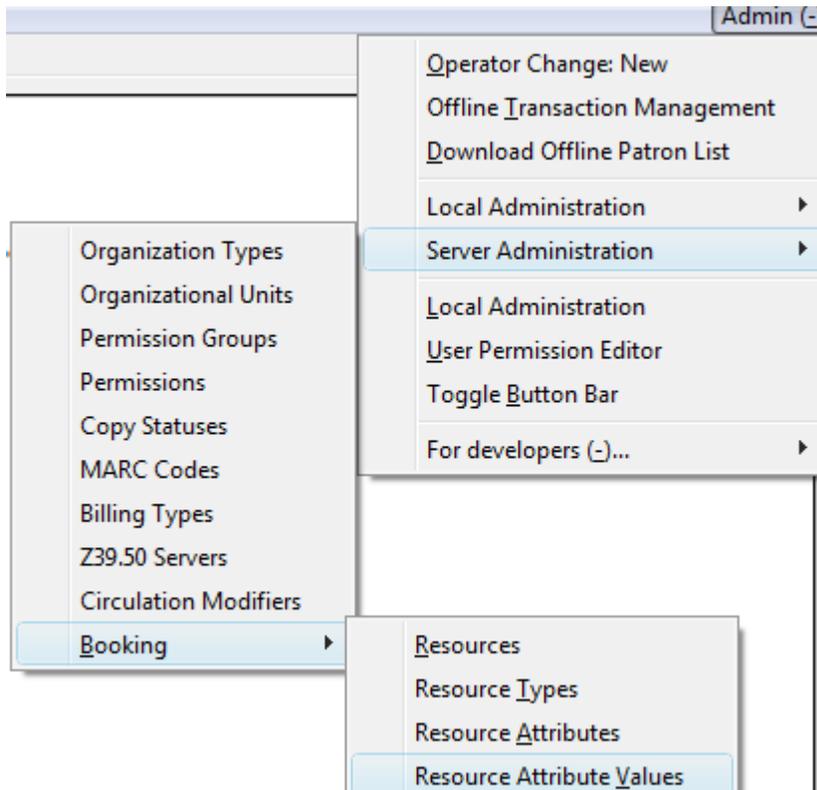
Resource Attributes			New Resource Attribute
<input checked="" type="checkbox"/>	Resource Attribute Name	Owning Library	Resource Type
<input type="checkbox"/>	Max Capacity	FENNELL	Room
<input type="checkbox"/>	Number of Seats	FENNELL	Conference Room

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.

Resource Attribute Name	<input type="text" value="Cart for Transportation"/>
Owning Library	FENNELL
Is Required	<input type="checkbox"/>
Resource Type	Projector
<input type="button" value="Cancel"/>	<input type="button" value="Save"/>

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*.



The screenshot shows a web application interface with an 'Admin' menu. The 'Admin' menu is open, showing options like 'Operator Change: New', 'Offline Transaction Management', 'Download Offline Patron List', 'Local Administration', 'Server Administration', 'Local Administration', 'User Permission Editor', 'Toggle Button Bar', and 'For developers...'. The 'Server Administration' option is selected, opening a sub-menu with 'Resources', 'Resource Types', 'Resource Attributes', and 'Resource Attribute Values'. The 'Booking' option is also visible in the sub-menu, and 'Resource Attribute Values' is highlighted.

11. Select *New Resource Attribute Value*.

Resource Attribute Values		
✓ Owning Library	Resource Attribute	Valid Value
		<input type="button" value="New Resource Attribute Value"/>

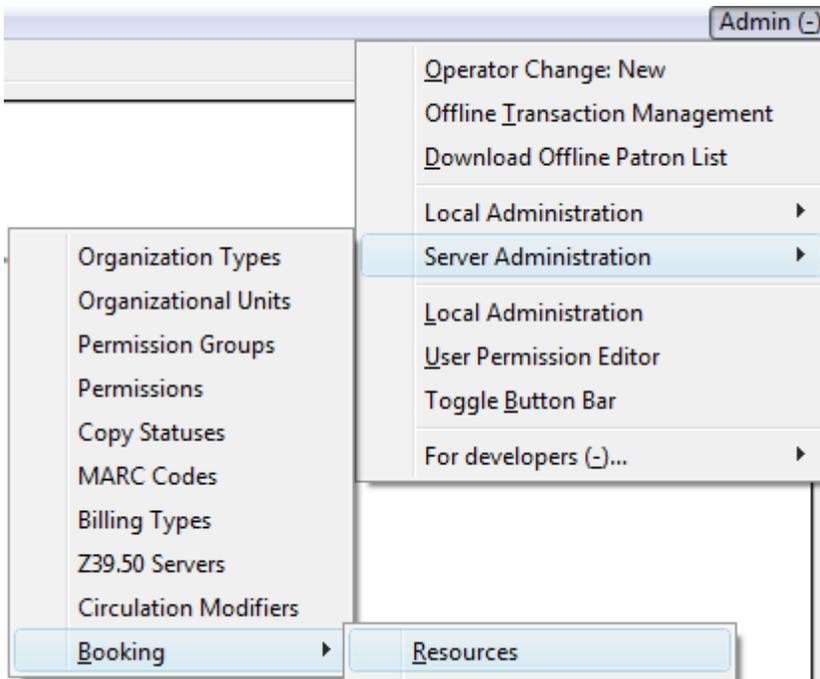
12. A pop up box will appear. Select the *Resource Attribute* from the drop down box. Add the value. You can add multiple values for this field. In this example, a projector might come with a cart for transportation, so the value would be yes. If it does not come with a cart for transportation, the value 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*.

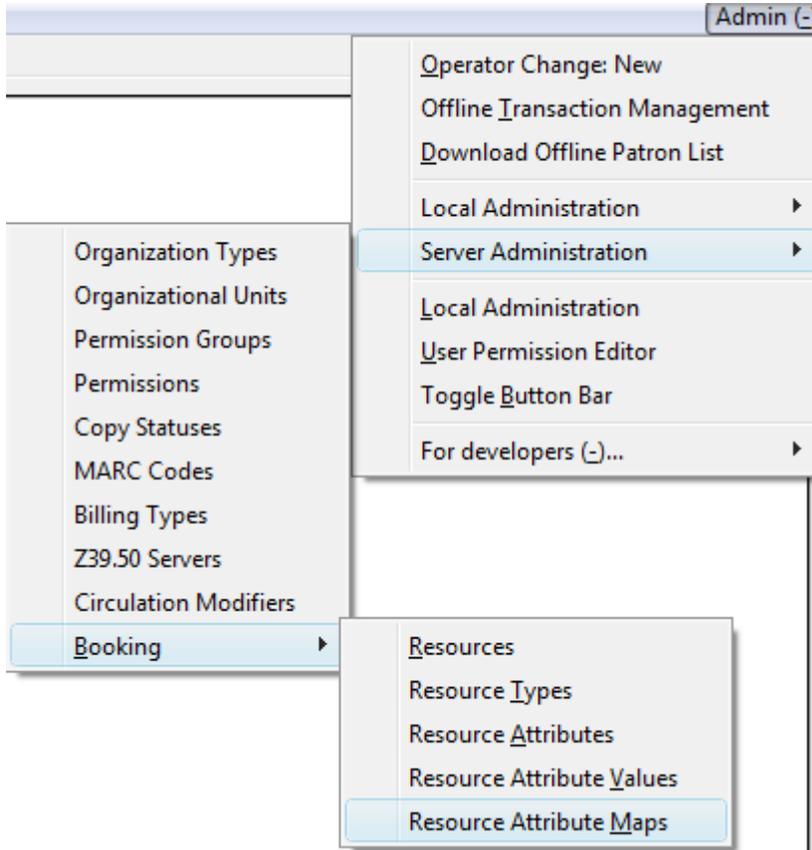
Resources							New Resource
<input checked="" type="checkbox"/>	Owning Library	Resource Type	Barcode	Overbook	Is Deposit Required	Deposit Amount	User Fee

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	<input type="checkbox"/>
Is Deposit Required	<input checked="" type="checkbox"/>
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

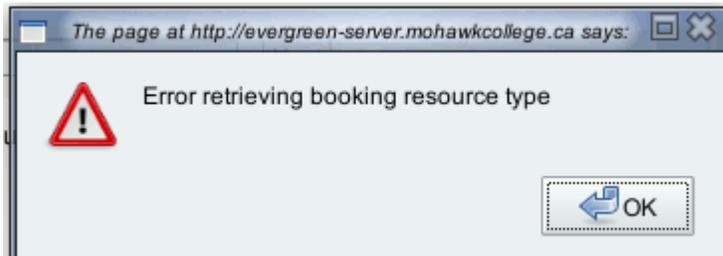
Attribute Value	No
Resource	Projector B
Resource Attribute	Cart for Transportation
Cancel	Save

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

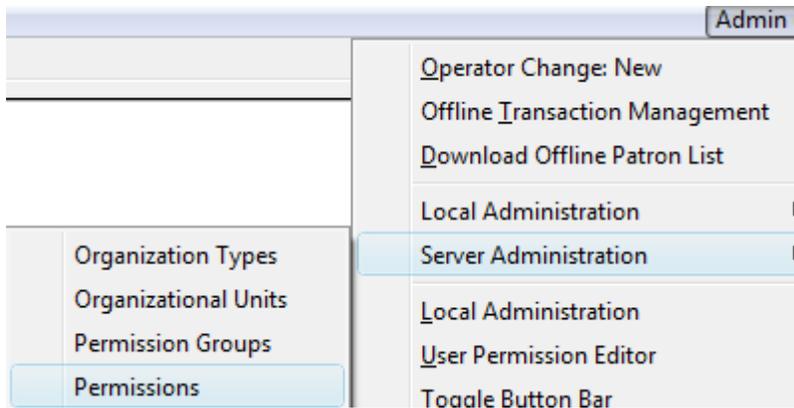
Setting Permissions

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.



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

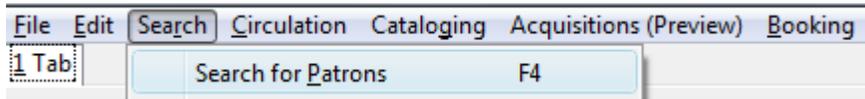
Create/update/delete booking resource attribute maps:
ADMIN_BOOKING_RESOURCE_ATTR_MAP

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

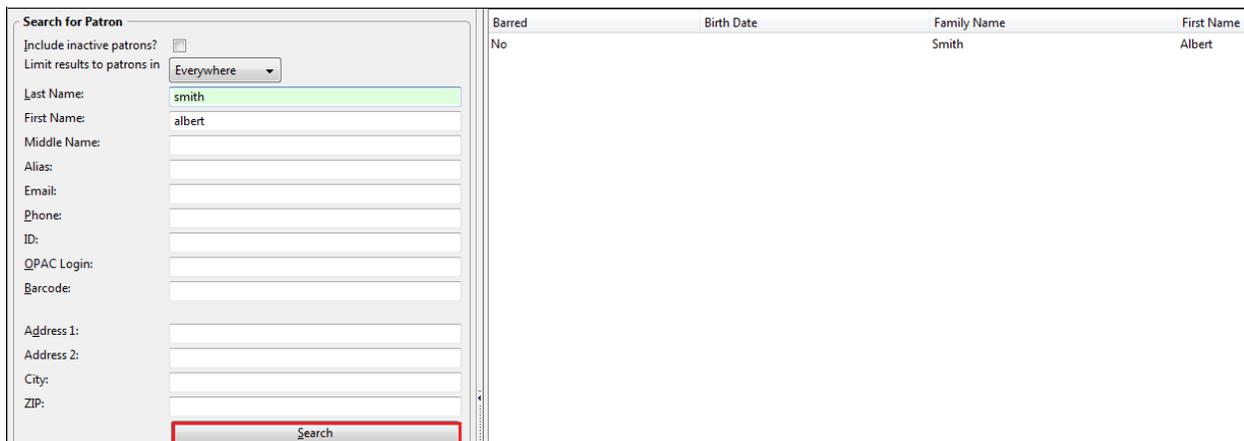
location, or home library, in their profiles. You can do this when you register a new staff member, or you can edit a staff member's existing record.

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

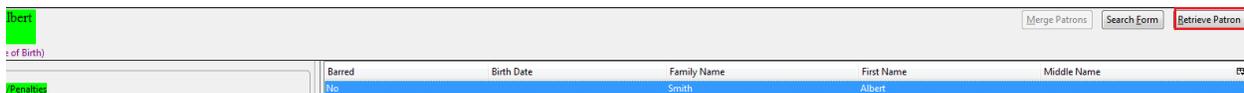
1. Select *Circulation* → *Search for Patrons*



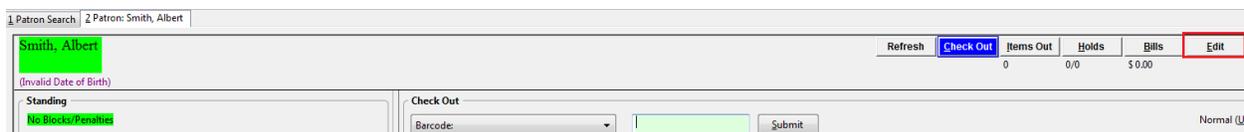
2. Enter the staff member's last name and first name in the boxes on the left side of the screen, and click *Search*. On the right side of the screen, select the staff member whose record you want to edit.



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.

<input type="button" value="Refresh"/> <input type="button" value="Check Out"/> <input type="button" value="Items Out"/> <input type="button" value="Holds"/> <input type="button" value="Bills"/> <input type="button" value="Edit"/>
0 0/0 \$ 0.00

Evergreen User Editor

Note: required or invalid fields are marked with color

1. User Identification

2. Contact Info

Barcode	<input type="text" value="000138626"/>	<input type="button" value="Mark Lost"/>
Username	<input type="text" value="albert.smith6"/>	
Password	<input type="password"/>	<input type="button" value="Reset"/>

- 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.

Evergreen User Editor

Note: required or invalid fields are marked with color

1. User Identification

2. Contact Info

3. Addresses

Email Address	<input type="text" value="albert.smith6@mohawkcollege.ca"/>	
Daytime Phone	<input type="text"/>	Example: 123-456-7890 or 123-456-7890 ex123
Evening Phone	<input type="text"/>	
Other (Cell Phone)	<input type="text"/>	
Home Library	<input style="border: 2px solid red;" type="text" value="STARRT"/>	

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

You are now ready to save the user to the database.
To view or print a summary of the changes, click on the 'View Summary' link.
To save the user, click on the 'Save User' button.

[View Summary](#)

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.