Updating PCRes to work with Evergreen

Notes:
The version of PCRes must be at least 3.2E before connecting with Evergreen.

The separate connection manager is no logger needed. All connection handling takes place in the PCRes Management Console only.

All the rules in the following document are based on Newton County Library System's rules and should be modified for each library's use.

1. At the Management Console (MC), click on the Preferences button.
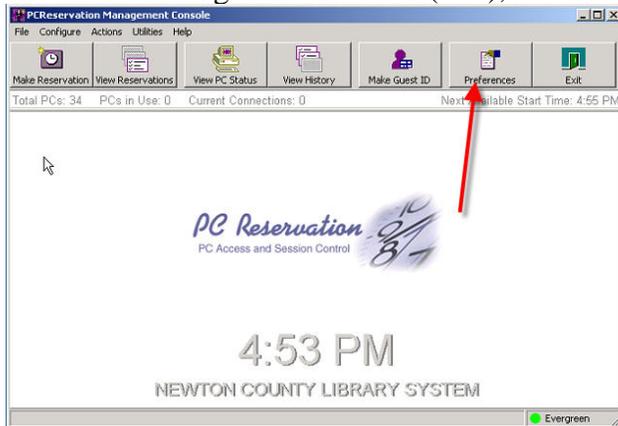
2. Click on the "Validating Authority" tab
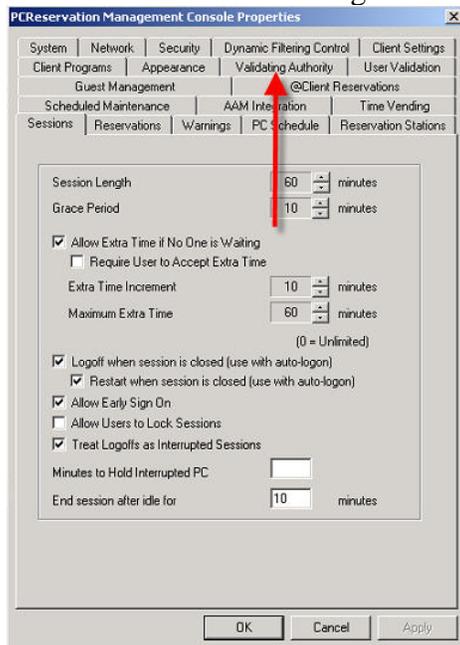
3. Click "Add"
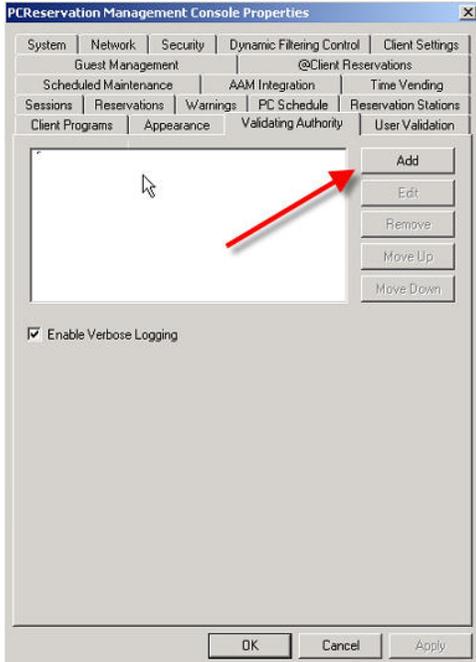
4. Select "Evergreen" as the Validating Authority.
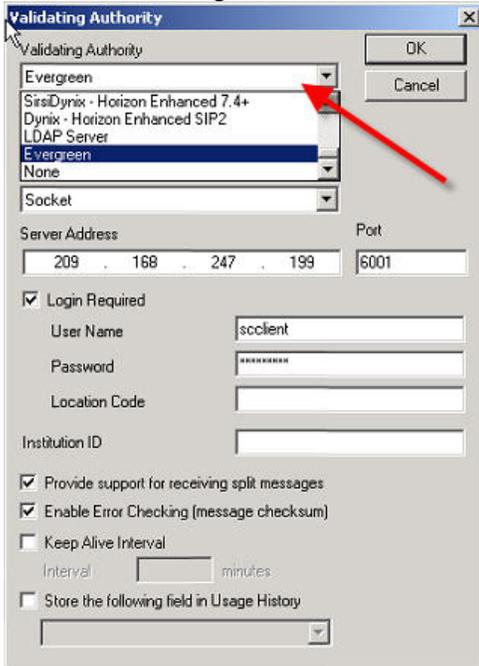
5. Under Server Address, type the IP address of the Validating Server. (gapines.org 209.168.247.199)
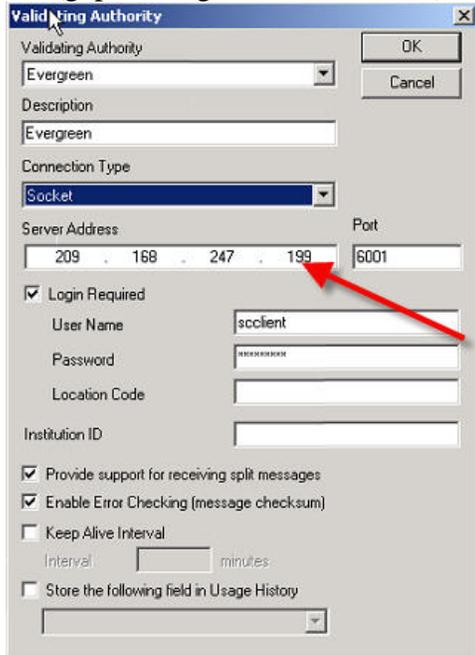
6. Type your User Name and Password. (NOTE: You need to get your username and password from Pines)
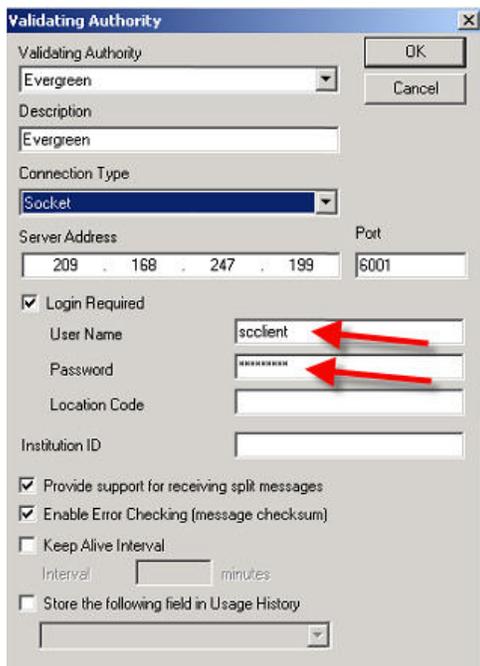
7. Click OK, on the Validating Authority Configuration Screen.

8. Click OK, on the PCRes Management Console Properties screen.

9. Click on "Configure" and then "User Validation Rules Wizard".
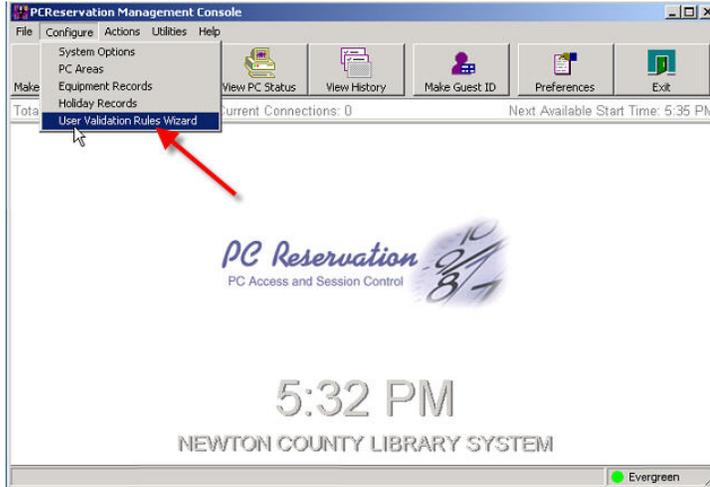
10. Write down your old rules and then remove them by clicking "Remove Rule".

11. Click on "Add Rule" to create a new rule.

12. Add a rule blocking BARRED patrons.
    a. If "Screen Message" "equals" "BARRED", then "Do Not Allow Computer Use". Then click the OK button.
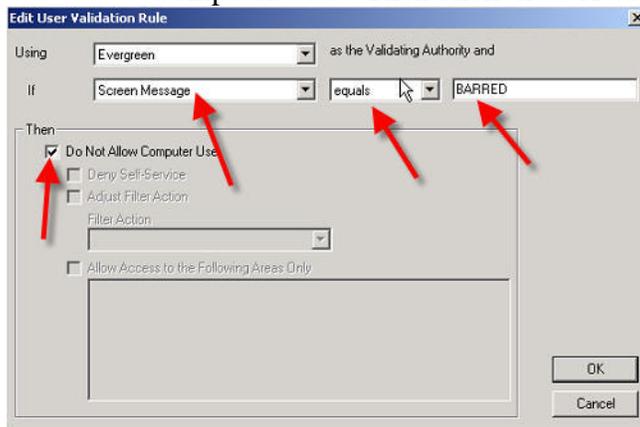
13. Add a rule blocking "BLOCKED" patrons. (When a patron has: Overdues, Max Fines, Expired, or Inactive)
    a. If "Screen Message" "equals" "BLOCKED", then "Do Not Allow Computer Use". Then click the OK button.

14. Add a rule based on age. (Note: This rule will vary based on how your library deals with juvenile patrons)

    NOTE: This rule shows that juvenile only has access to child computers.

15. Add a rule based on Internet Access equal "FILTERED".
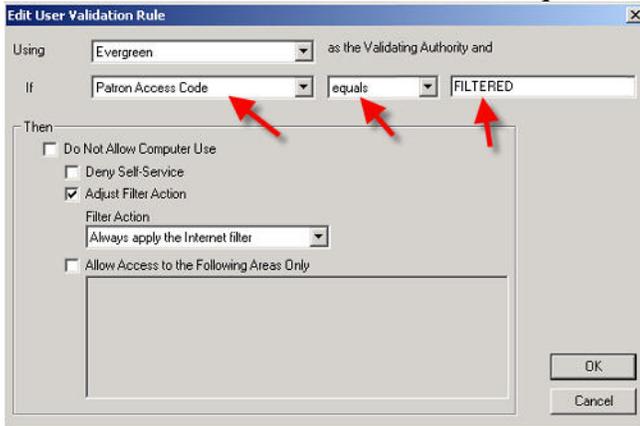
16. Add a rule based on Internet Access equal "UNFILTERED".
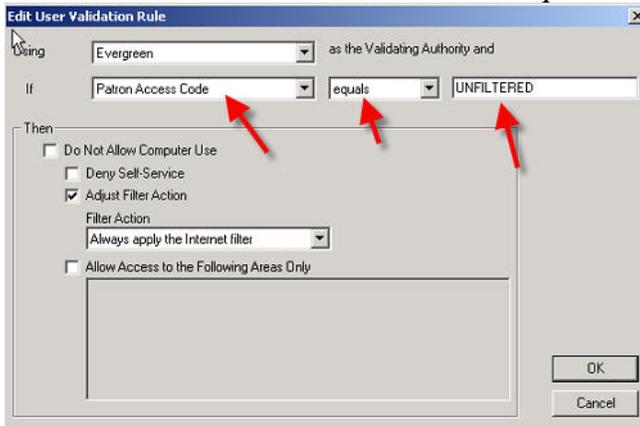
17. Add a rule based on Internet Access equal "NO ACCESS".
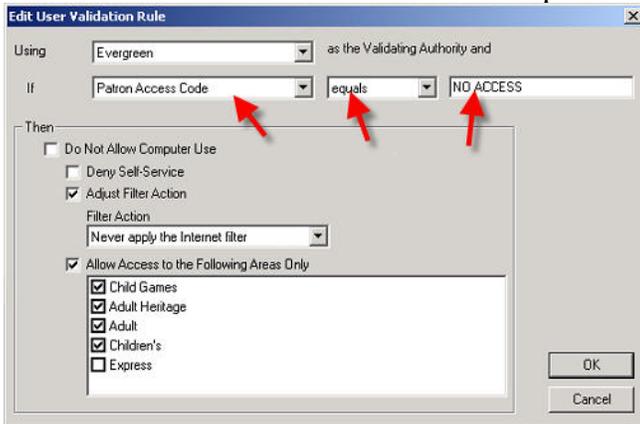
18. Click on OK.
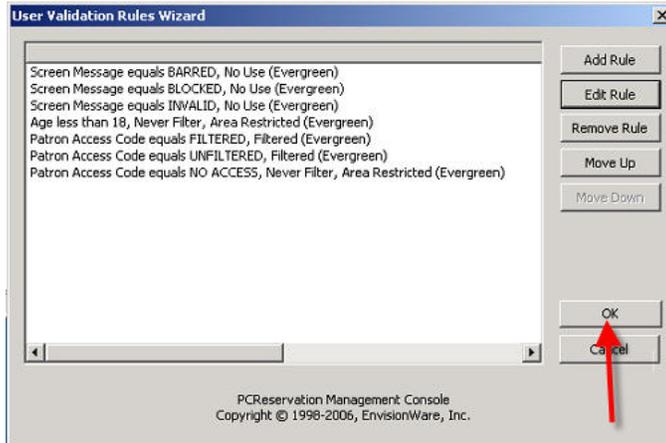
19. Now TEST your rules.

Post NOTE:

In Newton County Library's testing, we found that the new print drivers for Star sp212 printer were not compatible with PC Res. If you use the same receipt printer and if you use Evergreen with PCRes then:

1. Download the printer driver for the Star printer following instructions from PINES central. We suggest making the new print driver the default printer for Evergreen. (http://www.starmicronics.com/drv/download.php?id=2)
2. If you don't already have it set up, choose from the Windows OS the generic text printer driver and rename it, something short and simple. We renamed ours "Gen".
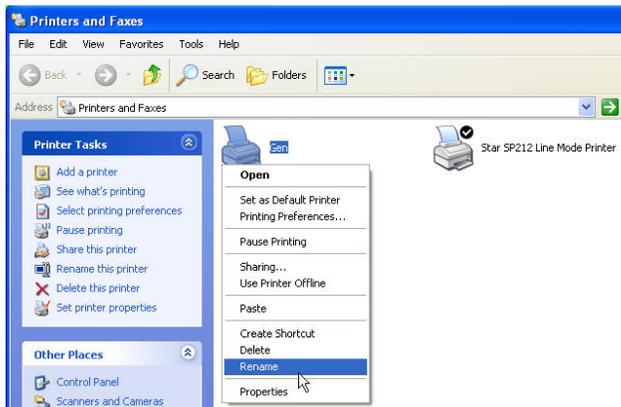
3. In the PC Reservations Management Console choose Preferences -> Reservations Stations tab, and go to the Receipt Printer name box. Type in the name you just gave the generic text printer driver. Click OK.
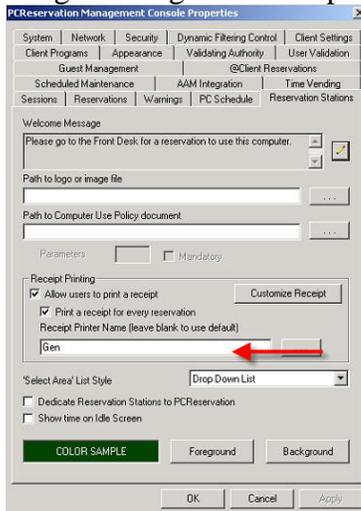
4. Test – PC Reservations should print out the receipt you are accustomed to using. Evergreen should print out receipts.
5. Remember that you may need to be logged on as Administrator to install and edit printer drivers.