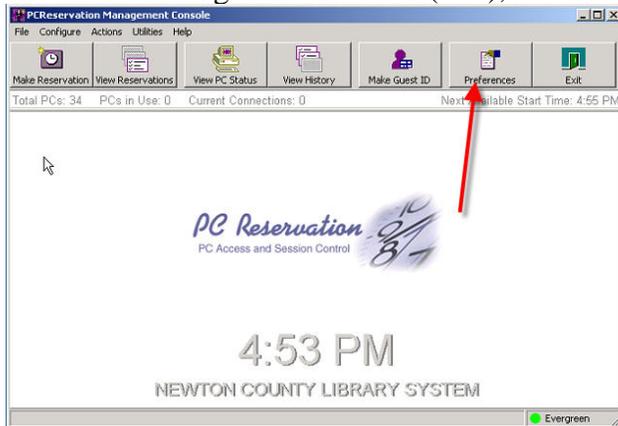


Updating PCRes to work with Evergreen

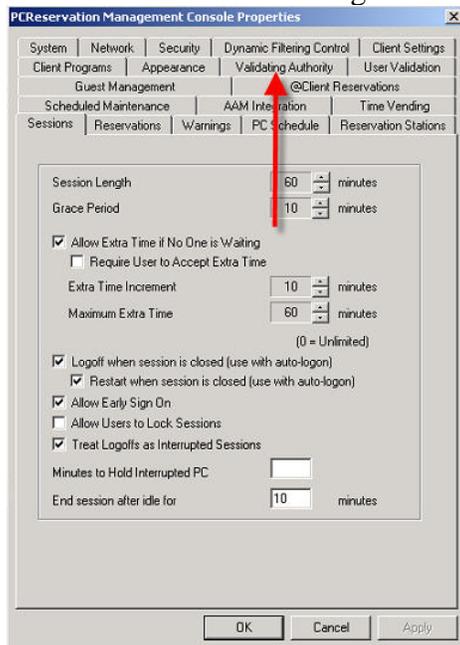
Notes:

- * The version of PCRes must be at least 3.2E before connecting with Evergreen.
- * The separate connection manager is no longer 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.

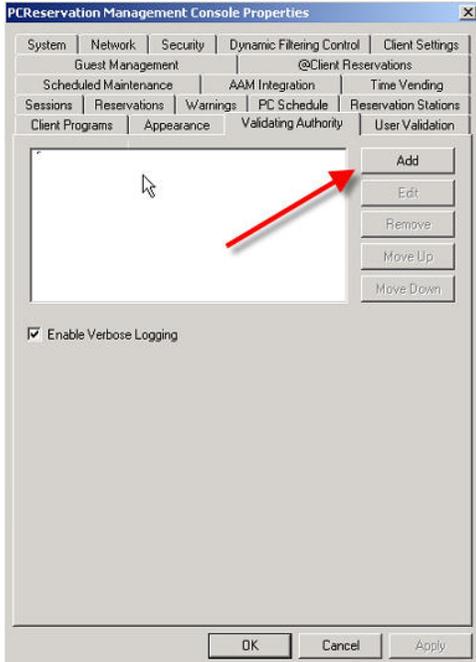
1. At the Management Console (MC), click on the Preferences button.



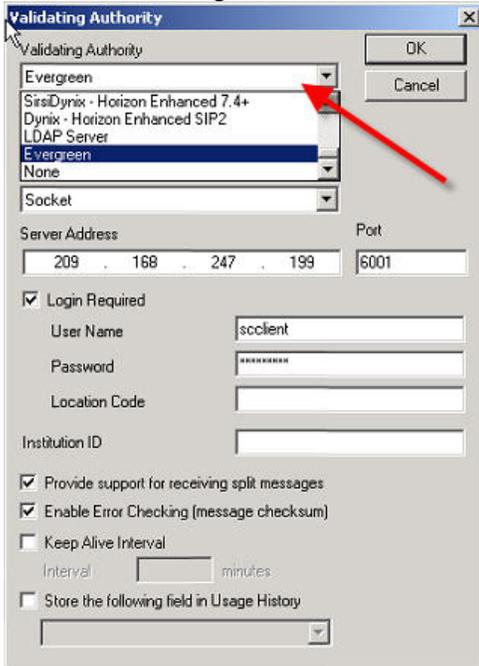
2. Click on the "Validating Authority" tab



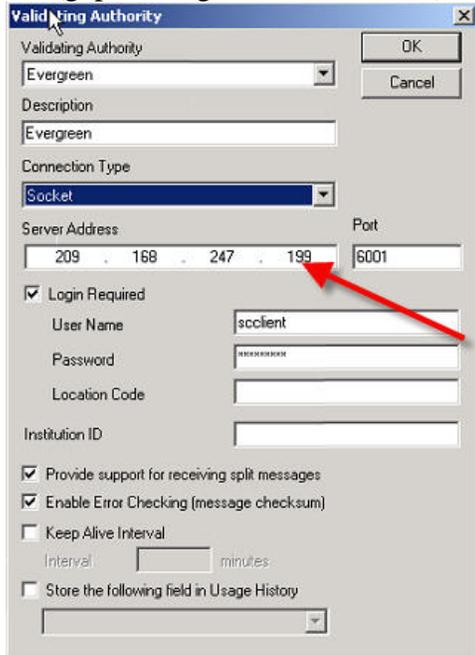
3. Click “Add”



4. Select “Evergreen” as the Validating Authority.

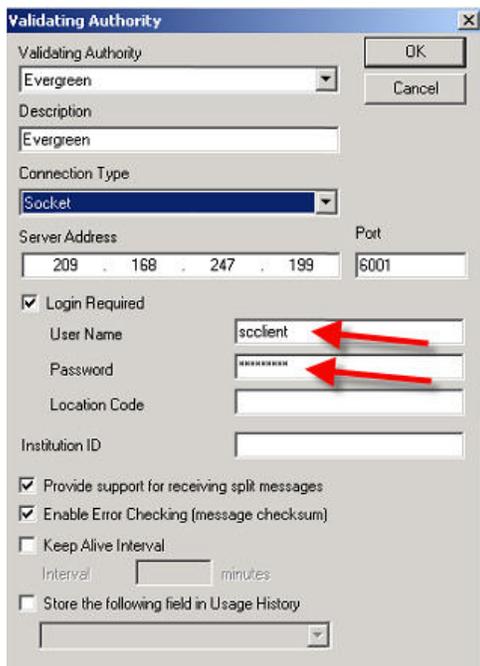


5. Under Server Address, type the IP address of the Validating Server.
(gapines.org 209.168.247.199)



The screenshot shows the 'Validating Authority' dialog box. The 'Validating Authority' dropdown is set to 'Evergreen'. The 'Description' field contains 'Evergreen'. The 'Connection Type' dropdown is set to 'Socket'. The 'Server Address' field is filled with '209 . 168 . 247 . 199' and the 'Port' field is '6001'. A red arrow points to the '199' in the IP address. The 'Login Required' checkbox is checked, and the 'User Name' field contains 'sccient'. The 'Password' field is masked with asterisks. There are also checkboxes for 'Provide support for receiving split messages', 'Enable Error Checking (message checksum)', and 'Keep Alive Interval'.

6. Type your User Name and Password.
(NOTE: You need to get your username and password from Pines)



This screenshot is identical to the previous one, but with two red arrows pointing to the 'User Name' field (containing 'sccient') and the 'Password' field (masked with asterisks).

7. Click OK, on the Validating Authority Configuration Screen.

Validating Authority

Validating Authority: Evergreen

Description: Evergreen

Connection Type: Socket

Server Address: 209 . 168 . 247 . 196 Port: 6001

Login Required

User Name: sccient

Password: *****

Location Code: [Empty]

Institution ID: [Empty]

Provide support for receiving split messages

Enable Error Checking (message checksum)

Keep Alive Interval

Interval: 5 minutes

Store the following field in Usage History

[Empty dropdown]

OK Cancel

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

PCReservation Management Console Properties

System | Network | Security | Dynamic Filtering Control | Client Settings

Guest Management | @Client Reservations

Scheduled Maintenance | AAM Integration | Time Vending

Sessions | Reservations | Warnings | PC Schedule | Reservation Stations

Client Programs | Appearance | Validating Authority | User Validation

Evergreen

Add

Edit

Remove

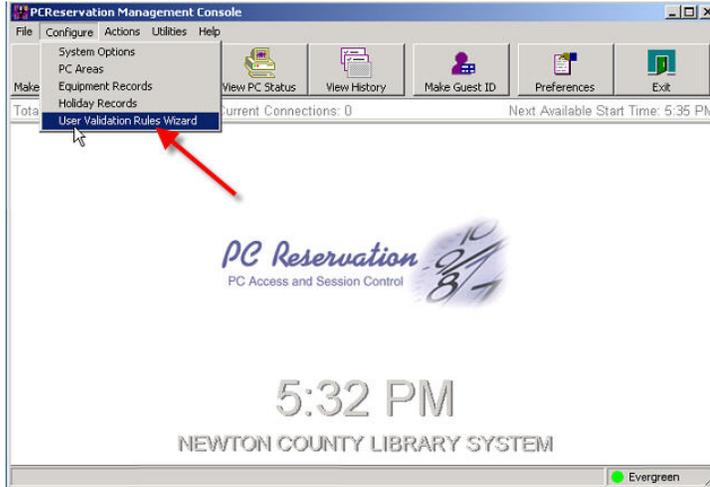
Move Up

Move Down

Enable Verbose Logging

OK Cancel Apply

9. Click on “Configure” and then “User Validation Rules Wizard”.



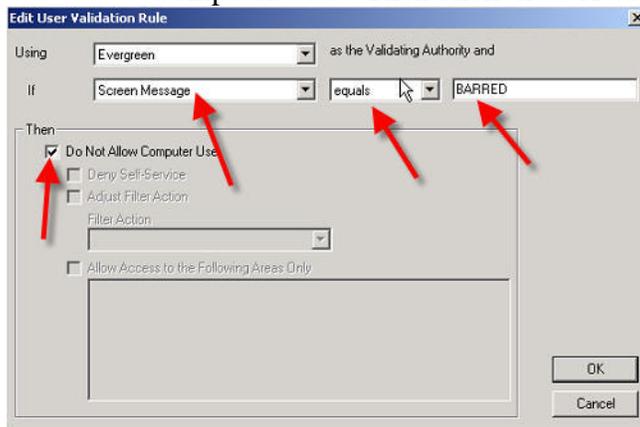
10. Write down your old rules and then remove them by clicking “Remove Rule”.

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.

Edit User Validation Rule

Using: as the Validating Authority and

If: equals

Then:

- Do Not Allow Computer Use
- Deny Self-Service
- Adjust Filter Action
- Filter Action:
- Allow Access to the Following Areas Only

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.

Edit User Validation Rule

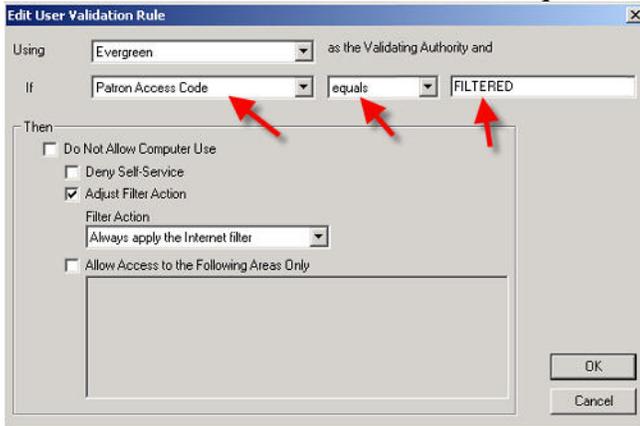
Using: as the Validating Authority and

If: less than

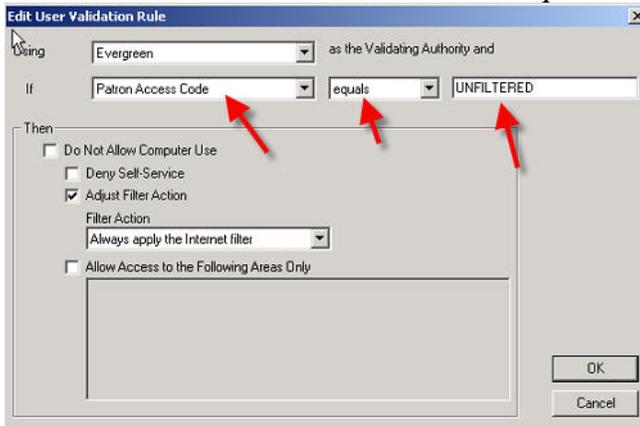
Then:

- Do Not Allow Computer Use
- Deny Self-Service
- Adjust Filter Action
- Filter Action:
- Allow Access to the Following Areas Only
 - Child Games
 - Adult Heritage
 - Adult
 - Children's
 - Express

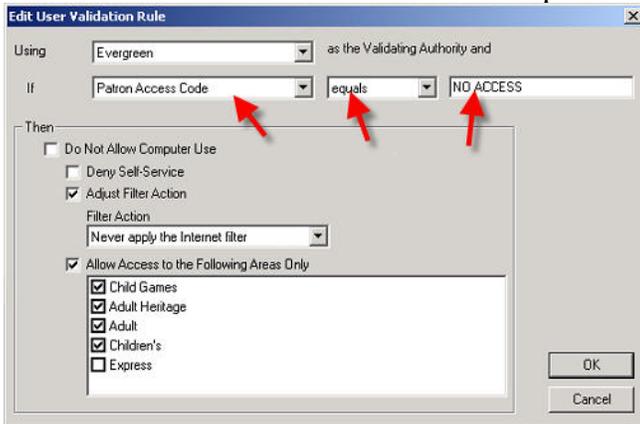
15. Add a rule based on Internet Access equal "FILTERED".



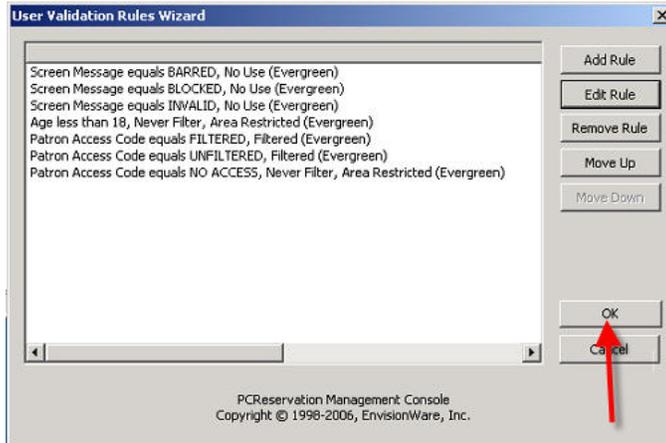
16. Add a rule based on Internet Access equal "UNFILTERED".



17. Add a rule based on Internet Access equal "NO ACCESS".



18. Click on OK.

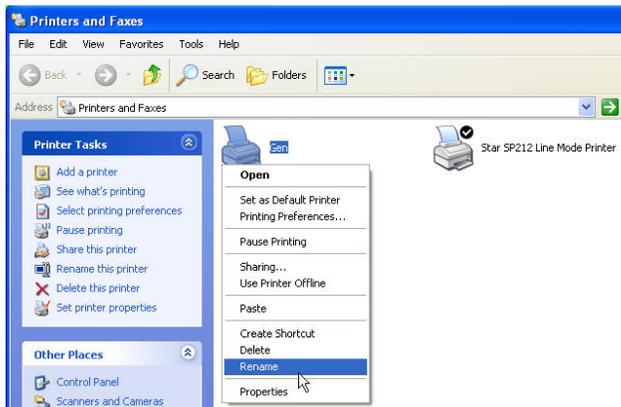


19. Now TEST your rules.

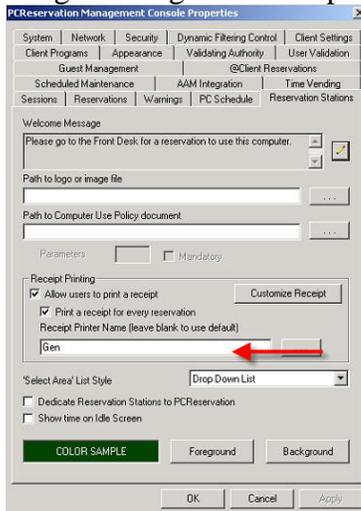
Post NOTE:

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.