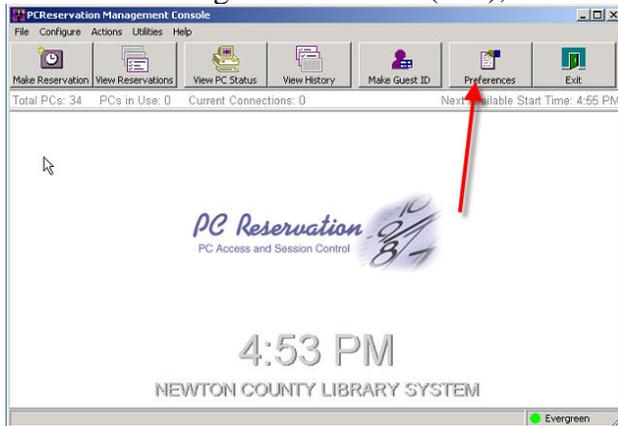


Updating PCRes to work with Evergreen

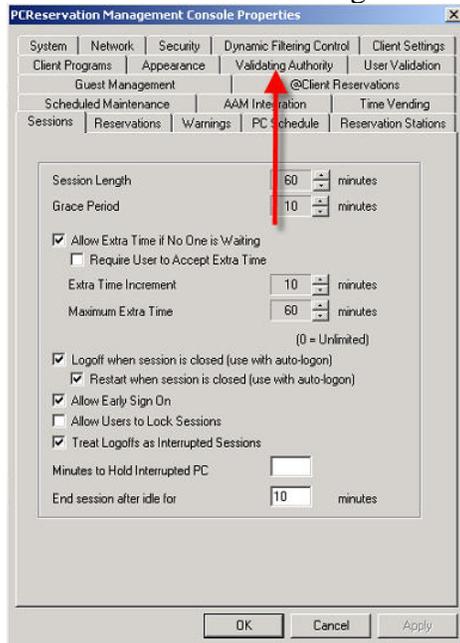
Notes:

- * 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.

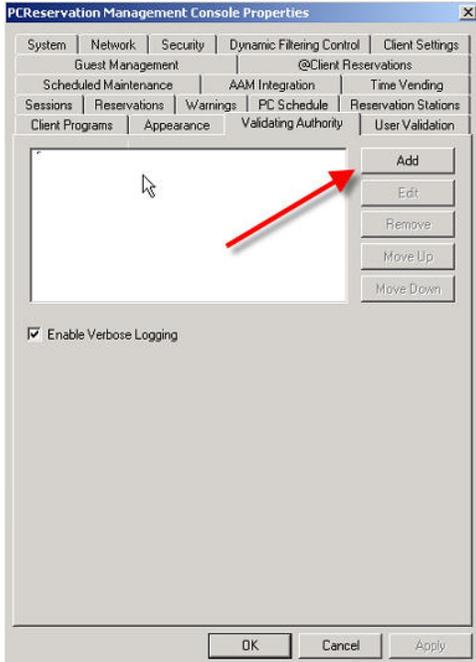
1. At the Management Console (MC), click on the Preferences button.



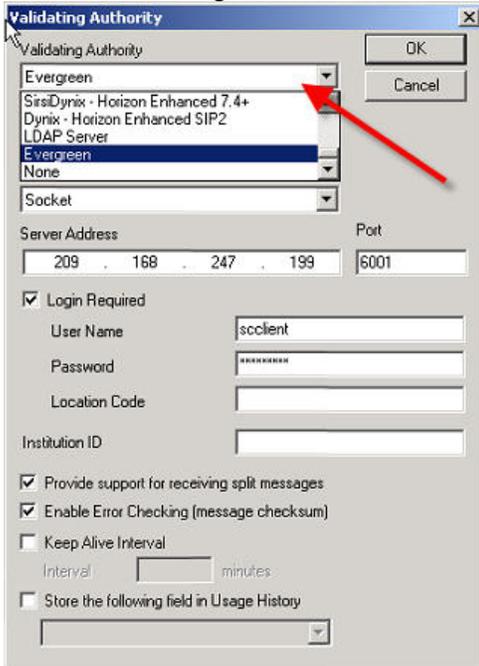
2. Click on the "Validating Authority" tab



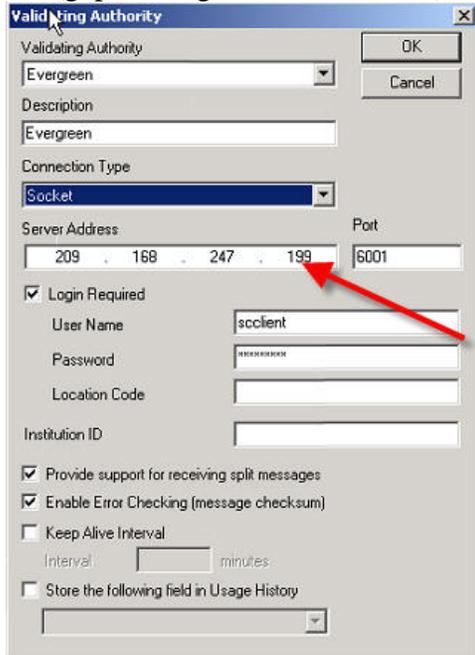
3. Click “Add”



4. Select “Evergreen” as the Validating Authority.

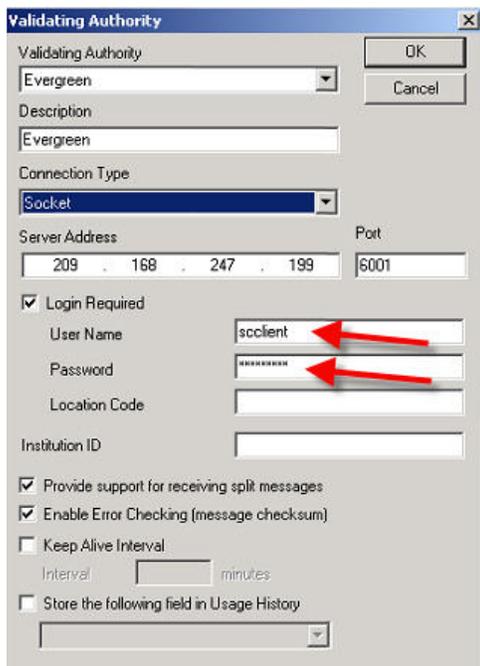


5. Under Server Address, type the IP address of the Validating Server.
(gapines.org 209.168.247.199)



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 filled with '6001'. A red arrow points to the '199' part of the IP address. Below these fields, there are several checkboxes: 'Login Required' (checked), 'Provide support for receiving split messages' (checked), 'Enable Error Checking (message checksum)' (checked), 'Keep Alive Interval' (unchecked), and 'Store the following field in Usage History' (unchecked). The 'User Name' field contains 'sccient' and the 'Password' field contains a masked password. There are also fields for 'Location Code' and 'Institution ID'.

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



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

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:

Institution ID:

Provide support for receiving split messages

Enable Error Checking (message checksum)

Keep Alive Interval

Interval: 5 minutes

Store the following field in Usage History

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

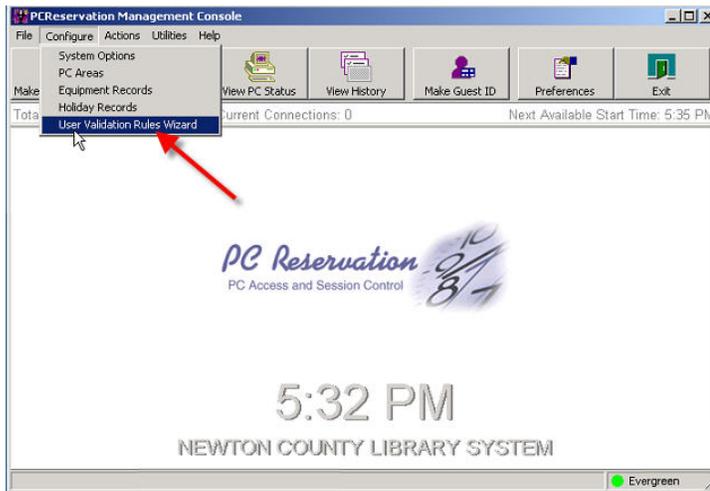
Move Up

Move Down

Enable Verbose Logging

OK Cancel Apply

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



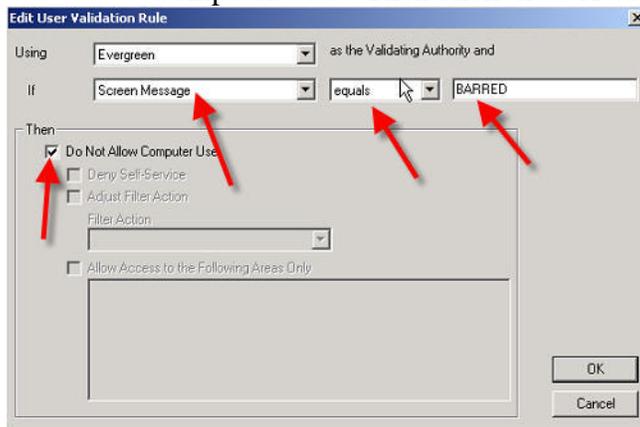
10. Write down your old rules and then remove them by clicking “Remove Rule”.

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.

The screenshot shows the 'Edit User Validation Rule' dialog box. The 'Using' dropdown is set to 'Evergreen'. The 'If' condition is 'Screen Message' equals 'BLOCKED'. The 'Then' section has 'Do Not Allow Computer Use' checked. Red arrows point to 'Screen Message', 'equals', and 'BLOCKED'.

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.

The screenshot shows the 'Edit User Validation Rule' dialog box. The 'Using' dropdown is set to 'Evergreen'. The 'If' condition is 'Age' less than '18'. The 'Then' section has 'Allow Access to the Following Areas Only' checked, with 'Child Games' and 'Children's' selected. Red arrows point to 'Age', 'less than', and '18'.

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

The screenshot shows the 'Edit User Validation Rule' dialog box. The 'Using' dropdown is set to 'Evergreen'. The 'If' condition is 'Patron Access Code' equals 'FILTERED'. The 'Then' section has 'Adjust Filter Action' checked, with the 'Filter Action' dropdown set to 'Always apply the Internet filter'. Other options like 'Do Not Allow Computer Use', 'Deny Self-Service', and 'Allow Access to the Following Areas Only' are unchecked. The 'OK' and 'Cancel' buttons are at the bottom right.

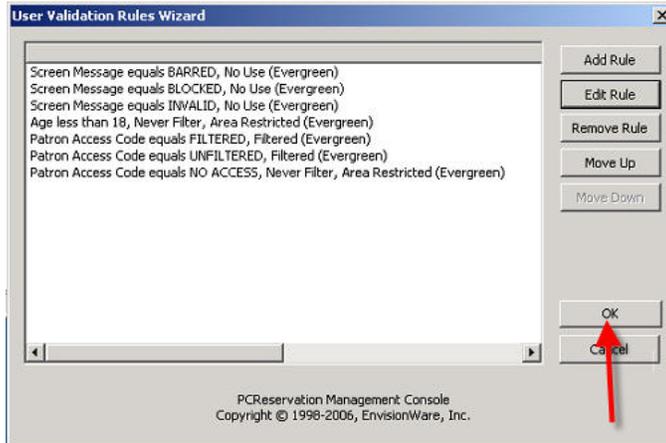
16. Add a rule based on Internet Access equal "UNFILTERED".

The screenshot shows the 'Edit User Validation Rule' dialog box. The 'Using' dropdown is set to 'Evergreen'. The 'If' condition is 'Patron Access Code' equals 'UNFILTERED'. The 'Then' section has 'Adjust Filter Action' checked, with the 'Filter Action' dropdown set to 'Always apply the Internet filter'. Other options are unchecked. The 'OK' and 'Cancel' buttons are at the bottom right.

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

The screenshot shows the 'Edit User Validation Rule' dialog box. The 'Using' dropdown is set to 'Evergreen'. The 'If' condition is 'Patron Access Code' equals 'NO ACCESS'. The 'Then' section has 'Adjust Filter Action' checked, with the 'Filter Action' dropdown set to 'Never apply the Internet filter'. The 'Allow Access to the Following Areas Only' checkbox is checked, and the following areas are selected: 'Child Games', 'Adult Heritage', 'Adult', and 'Children's'. 'Express' is not selected. The 'OK' and 'Cancel' buttons are at the bottom right.

18. Click on OK.

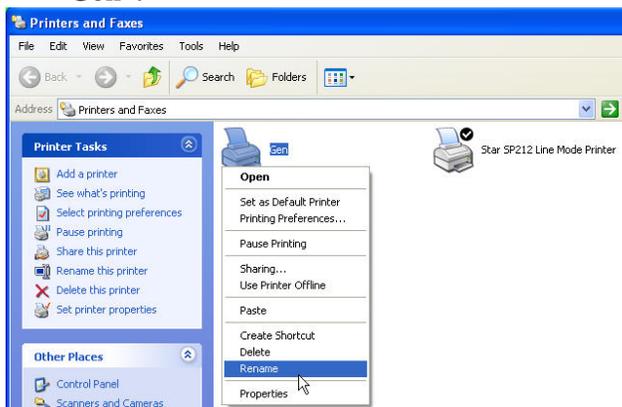


19. Now TEST your rules.

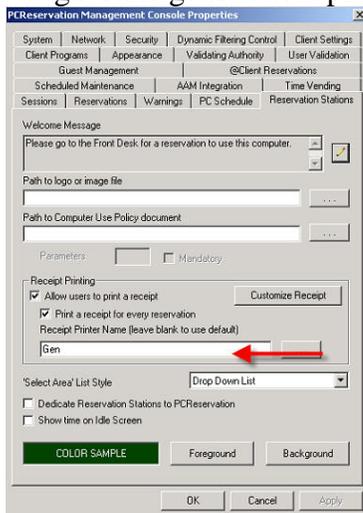
Post NOTE:

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.