

Booking

The booking module was enabled with the 3.4 Evergreen upgrade in January 2020.

Libraries can currently configure two types of resources for reservations: rooms and projectors. To do this, the LocalAdmin will follow the steps below to set up the resources. After they are configured, circulation staff will be able to reserve them for staff or patron use.

If additional resource types are needed, please contact the Help Desk with your request.

1. Local Admin: Set Up Resources

1. Go to: Administration > Booking Administration > Resources
2. Click on New Resource
3. Example for a meeting room:
 1. Barcode: Create a unique name for the room (ARL-ATH-ROOM1)
 2. Deposit Amount: Leave blank unless you charge a room deposit
 3. Is Deposit Required: Leave blank unless you charge a room deposit
 4. Overbook: Leave blank
 5. Owning Library: Select the short policy name (ARL-ATH)
 6. Resource Type: Room
 7. User Fee: Leave blank unless you charge a user fee
4. Click Save

Record Editor: Resource

Barcode: ARL-ATH-ROOM1

Deposit Amount: Deposit Amount...

Is Deposit Required:

Overbook:

Owning Library: ARL-ATH

Resource ID:

Resource Type: ROOM

User Fee: User Fee...

Cancel Save

Optional: Define Resource Attributes



This feature doesn't currently work correctly. See: <https://bugs.launchpad.net/evergreen/+bug/1807784>

Resource attributes can be defined if you want to be able to filter your list of resources - for example, if you had 10 meeting rooms, it might be helpful to be able to only show the rooms that could hold 50-80 people. However, if you only have two meeting rooms, it may be easier to identify them by name (Large Meeting Room, Small Meeting Room)

1. Set up resource attributes
 1. Administration > Booking Administration > Resource Attributes
 2. Click New Resource Attribute button
 3. Example for number of seats:
 1. Owning Library: Select the short policy name (ARL-ATH)
 2. Resource Attribute Name: Number of Seats
 3. Resource Type: Room
2. Set up Resource Attribute Values
 1. Administration > Booking Administration > Resource Attribute Values
 2. Click New Resource Attribute Value button
 3. Fill out form

1. Owing Library: Select the short policy name (ARL-ATH)
2. Resource Attribute: Number of Seats
3. Valid Value: 10
4. Repeat for each possible value
 1. If the different sizes of rooms can hold 5, 10, or 50 people, set up a Resource Attribute Value for each size. You may also enter more descriptive attributes such as "Up to 20" or "20 at tables - 50 in chairs."
3. Set up Resource Attribute Map
 1. Administration > Booking Administration > Resource Attribute Map
 2. Click New Resource Attribute Map button
 3. Fill out form
 1. Resource: Enter 'barcode' of resource (ARL-ATH-ROOM1)
 2. Resource Attribute: Number of Seats
 3. Attribute Value: 10
 4. Repeat until all resources have the appropriate values attached (ie, each room is associated with the proper number of seats).

2. Circulation Staff: Make Reservations

Patrons cannot reserve resources on their own, they must ask library staff to make a reservation on their behalf.

1. Click on Booking > Create Reservation
 - Or: Open a patron account > Other > Booking: Create Reservation

2. Choose Single Day Reservation
3. Choose a Reservation Date
4. On 'Choose resource by type' tab, search by type Room and the owning library
 - Or, use the 'Choose resource by barcode' tab to enter the barcode

Create Reservation

Reservation type Single day reservation

Reservation date 2020-01-31

Choose resource by type

Choose resource by barcode

Limit by attributes

Schedule settings

Search by resource type ROOM

📄

Owning library ARL-ATH

+ Descendants

< Previous day

01/31/2020

Next day >

Create Reservation

0 selected ☰ ▼ ⚙️

<input type="checkbox"/>	#	🔔	Time	ARL-ATH-ROOM1
<input type="checkbox"/>	1	🔔	8:00 AM	
<input type="checkbox"/>	2	🔔	8:30 AM	
<input type="checkbox"/>	3	🔔	9:00 AM	
<input type="checkbox"/>	4	🔔	9:30 AM	
<input type="checkbox"/>	5	🔔	10:00 AM	
<input type="checkbox"/>	6	🔔	10:30 AM	

5. Double-click on the starting time slot (example: 10:00 AM)
6. Patron Barcode: Enter barcode
 - If creating reservation from a patron account, it should automatically fill in the patron barcode
7. Enter an End Time
8. Confirm Reservation Location
 - This defaults to the current location rather than to the resource's owning library
9. Click 'Confirm'

Confirm Reservation Details ✕

Patron barcode

21017000798669 📄

TEST ACCOUNT

Start time

01/31/2020 10:00

📅

End time

01/31/2020 13:00

📅

Reservation location

ARL-ATH

?

Resource

ARL-ATH-ROOM1

↕

Notify by email?

Confirm reservation

Confirm and show patron reservations

Cancel



If you wish to add a descriptive note to a reservation, you can do so by editing the reservation from the Manage Reservations screen. This will allow you to include room requirements, additional contact information, etc.



If you are reserving a room for a member of the public who does not have a library card, you can reserve it with a staff card, and then edit the Notes field to add the person/group's details.

3. Circulation Staff: Manage Reservations

Every library that uses the booking module should check the reservations each morning to view reservations for the day.

1. Click on Booking > Manage Reservations
2. Verify that the correct Reservation Location is appearing
3. Double-click on a reservation to view the full details

Manage Reservations

Reservation location: ARL-ATH

+ Ancestors
 + Descendants

Create New Reservation

Filter reservations

Filter by patron | Filter by resource | Filter by resource type

Resource type: [dropdown] Remove filter

0 selected [dropdown] [I<] [<] [>] Rows 10 [dropdown] [gear]

#	Patron first name	Patron family name	Start Time	End Time	Resource Barcode	Resource Type	Reservation length	Reservation location
1	TEST	ACCOUNT	01/31/2020 10:00	01/31/2020 12:30	ARL-ATH-ROOM1	ROOM	3 hours	Athens-Clarke Count...

4. View Reservations for a Patron

Staff can view a patron's reservations by opening the account and clicking on Other > Booking: Manage Reservations.

Manage Reservations

Reservation location: PINES

+ Ancestors
 + Descendants

Create New Reservation

Filter reservations

Filter by patron | Filter by resource | Filter by resource type

Patron barcode: 21017000798669 Remove filter

0 selected [dropdown] [I<] [<] [>] Rows 10 [dropdown] [gear]

#	Patron first name	Patron family name	Start Time	End Time	Resource Barcode	Resource Type	Reservation length	Reservation location
1	TEST	ACCOUNT	01/31/2020 10:00	01/31/2020 12:30	ARL-ATH-ROOM1	ROOM	3 hours	Athens-Clarke Count...

Notes

The Booking Module is currently undergoing additional development. More information on the progress and ideas for future work can be found on the [Evergreen Student Success Working Group](#) site.

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