Booking

The booking module was enabled with the 3.4 Evergreen upgrade in January 2020.
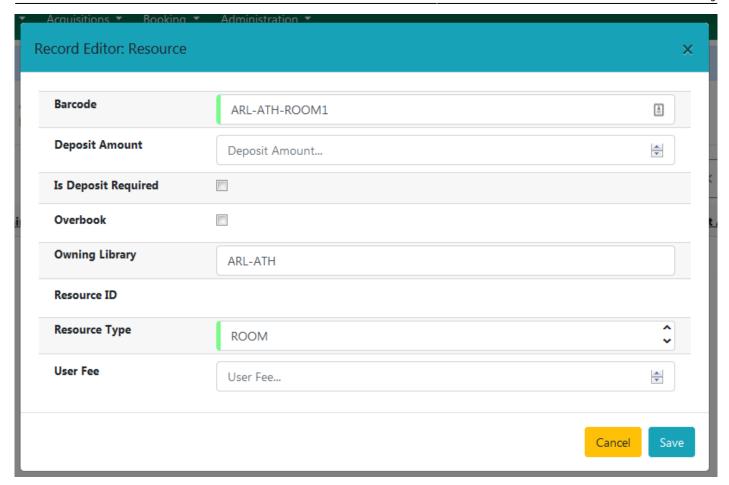
Libraries can currently configure two types of resources for reservations: rooms and projectors. To do this, the LocalAdmin will follow the steps below to set up the resources. After they are configured, circulation staff will be able to reserve them for staff or patron use.

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

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. Owning 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 number
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

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
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'

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

4. Patrons: View Reservations

Patrons will be able to view their reservations through 'My Account' in the OPAC.

From:
<https://pines.georgialibraries.org/dokuwiki/> - **PINES Documentation**

Permanent link:
https://pines.georgialibraries.org/dokuwiki/doku.php?id=circ:booking&rev=1578951546

Last update: **2020/01/13 21:39**