

## Using the Booking Module Equinox Software, Inc.

The following documentation will help users to create reservations for cataloged and non-bibliographic items; create pull lists for reserved items; capture resources; and pick up and return reservations.

### Creating a Reservation


Only staff members can create reservations. Patrons cannot create reservations. Staff can create reservations in one of three ways:

1. Book an item from a catalog search via the staff client
2. Book an item from the patron’s record
3. Book an item using the booking module.

#### Search the catalog to create a reservation:

1. In the staff client, select *Search* → *Search the Catalog*
2. Search for the item to be booked.
3. A result or list of results will appear. Select the title of the item to be reserved.
4. After clicking the title, the record summary appears. Beneath the record summary, the copy summary will appear. In the *Actions* column, select *Copy Details*.

Result 2 of 3    Start << >> End

Record Summary	
Title	Autocad 2010 in 2d and 3d : a modern perspective / Paul Richard, Frank E. Puerta, Jim Fitzgerald.
Author	Richard, Paul
Edition	
Publisher	Pearson/Prentice Hall, c2010
Physical Description	print xviv, 1389 p. : ill. ; 28 cm.
Format	 text
Abstract	
Subjects	Computer graphics. Three-dimensional display systems.
Call Number	

[Copy Summary](#)    [Shelf Browser](#)    [MARC Record](#)

View copy information for all libraries								
Library	Callnumber	Copy Location	Actions	Available	Checked out	In transit	Reshelving	On holds shelf
Fennell	<a href="#">T385.R53 2010</a>	STACKS	<a href="#">Copy Details</a> <a href="#">Browse Call Numbers</a> <a href="#">Place Hold</a>	1	0	0	0	0

- The *Copy Details* will appear in a new row. Choose the item that you want to book, and in the *barcode* column, click the *book now* link.

[print these details](#)

Barcode	Status	Location	Age Hold Protection
30731101110454 <a href="#">place hold</a> <a href="#">book now</a>	Available	STACKS	- Disabled -

- A screen showing the title and barcodes of available copies will appear.
- Enter the user's barcode in the *Reserve to patron barcode* box. If the patron barcode does not exist, a pop up box will appear to alert you to the error. After entering the patron's barcode, the user's existing reservations will appear at the bottom of the screen.
- Select the pickup library from the dropdown box, *Choose the pickup library for this reservation*.
- To the right, a section titled, *I need this resource...* will allow you to set the dates and times for which the item should be reserved. If the date/time boxes appear in red, then the date and time set is incorrect. The times must be set correctly for the reservation to be accomplished. If the item has already been reserved at the time for which you are trying to reserve the item, then you will receive an error message.
- Finally, select the barcode of the item that you want to reserve. If multiple copies of the item exist, choose the barcode of the copy that you want to reserve, and click *Reserve Selected*. If you do not have a preference, you do not have to select a barcode, and you may click *Reserve Any*. One of the barcodes will be pulled from the list.

Note: An item must have a status of available or reshelving in order to be targeted for a reservation. If the item is in another status, the reservation will fail.

4 Bib Record: 15685458

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**Record Summary**  
**Title:** Autocad 2010 in 2d and 3d : a modern perspective  
**Author:** Richard, Paul  
**TCN:** (System Local) [15685458](#)      **Created By:** (FENNELL) [000113212](#)      **Edition:**  
**Last Edited By:** (FENNELL) [000113212](#)

Record 2 of 3                  
   

**Autocad 2010 in 2d and 3d : a modern perspective**

30731101110454
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**I need this resource...**

Between  
      
and  
   

Reserve to patron barcode:   
Choose the pickup library for this reservation:  ▾

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**Existing reservations for Johnson, Bonnie:**  
This user has no existing reservations at this time.

11. After you have made the reservation, a message will confirm that the action succeeded. Click *OK*.

12. The screen will refresh, and the reservation will appear below the user's name.

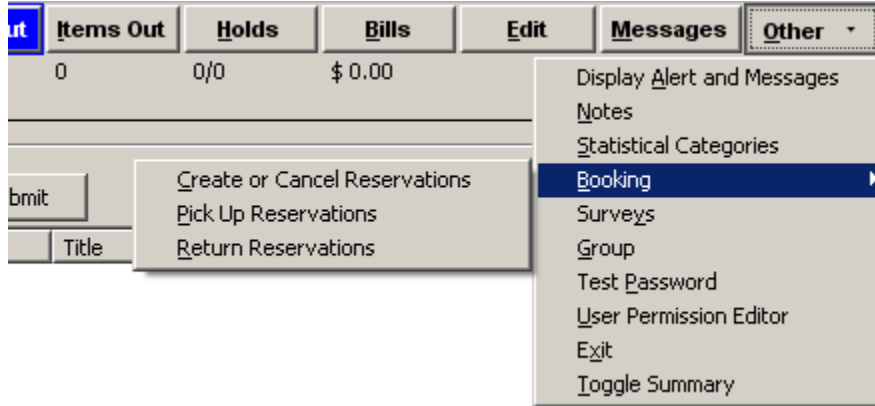
**Existing reservations for Johnson, Bonnie:**

Type	Resource	Start time
Autocad 2010 in 2d and 3d : a modern perspective	30731101110454	2010-01-20 16:57

**Enter a patron's record to create a reservation.**

1. Search for a patron. Click *Search* → *Search for Patrons*.
2. Enter the barcode or patron information, and click *Search* to retrieve the patron's record.
3. The match(es) should appear in the right pane. Click the desired patron's name. In the left panel, a summary of the patron's information will appear. Click the *Retrieve Patron* button in the right corner to access more options in the patron's record.

4. Eight buttons will appear in the top right corner. Select *Other* → *Booking* to create, cancel, pick up, and return reservations.



5. Follow steps six through twelve in the previous section, **Search the catalog to create a reservation**, to create a reservation.

### Use the booking module to create a reservation:

You can choose to book a noncataloged resource, such as a laptop or meeting room, or you can book a cataloged resource, such as a book.

First, let's reserve a **noncataloged resource**.

1. Select *Booking* → *Create or Edit Reservations* To reserve a room, for example, highlight *Room*, and click *Next*.

1 Reservations

## Choose a Bookable Resource Type

Laptop  
Room  
Room 10

Next

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- Or -

Enter the barcode of a cataloged, bookable resource:  Next

To reserve an item that is not yet registered as a bookable resource, find it in the catalog or under *Display Item*,

2. A screen showing the name of the available resource will appear.
3. Enter the user's barcode in the *Reserve to patron barcode* box. If the patron barcode does not exist, a pop up box will appear to alert you to the error. After entering the patron's barcode, the user's existing reservations will appear.
4. To the right, a section titled, *I need this resource...* will allow you to set the dates and times for which the item should be reserved. If the date/time boxes appear in red, then the date and time set is incorrect. The times must be set correctly for the reservation to be accomplished. If the resource has already been reserved at the time for which you want to reserve the item, then the item will disappear.
5. Finally, select the resource that you want to reserve. If multiple items or rooms exist, choose the resource that you want to reserve, and click *Reserve Selected*. If you do not have a preference, you may click *Reserve Any*, and one of the resources will be pulled from the list.

### Room

Magnolia

Reserve to patron barcode:

Choose the pickup library for this reservation:

#### I need this resource...

Between

and

#### With these attributes:

max 25

Max 50

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**Existing reservations for Johnson, Bonnie:**

Type	Resource	Start time
Autocad 2010 in 2d and 3d : a modern perspective	30731101110454	2010-01-22 07:57

- After you have made the reservation, a message will confirm that the action succeeded. Click *OK*.
- The screen will refresh, and the reservation will appear below the user's name.

**Existing reservations for Johnson, Bonnie:**

Type	Resource	Start time
Autocad 2010 in 2d and 3d : a modern perspective	30731101110454	2010-01-22 07:57
The budget plan	30731100809601	2010-01-25 17:15
Room	Magnolia	2010-01-29 11:27

**Now, let's reserve a cataloged resource:**

- Select *Booking* → *Create or Edit Reservations*. To reserve a cataloged item, such as a book, enter the barcode in the box, and click *Next*.

- Or -

Enter the barcode of a cataloged, bookable resource:

To reserve an item that is not yet registered as a bookable resource, find it in the catalog or under *Display Item*, and select *Make Item Bookable* or *Book Item Now* there.

2. Follow steps six through twelve in the section, **Search the catalog to create a reservation**, to create a reservation.

## Canceling a Reservation

Staff members can cancel a patron’s reservation in one of two ways:

1. Through the *Create or Cancel Reservations* tab available in a patron’s record.
2. Cancel a reservation immediately after it has been made in the reservations screen in the booking module.

### Enter the patron’s record to cancel a reservation.

1. Search for and retrieve a patron’s record.
2. Select *Other* → *Booking* → *Create or Cancel Reservations*.
3. The existing reservations will appear at the bottom of the screen.
4. To cancel a reservation, highlight the reservation that you want to cancel. Click *Cancel Selected*.

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#### Existing reservations for Johnson, Bonnie:

Type	Resource	Start time
Autocad 2010 in 2d and 3d : a modern perspective	30731101110454	2010-01-22 07:57
The budget plan	30731100809601	2010-01-25 17:15
Room	Magnolia	2010-01-29 11:27

Cancel selected

5. A pop-up window will confirm that you cancelled the reservation. Click *OK*.
6. The screen will refresh, and the cancelled reservation will disappear.

### In the booking module, cancel a reservation immediately after it has been made.

1. Create the reservation.

2. Check the box next to the reservation, and click *Cancel selected*.

### Autocad 2010 in 2d and 3d : a modern perspective

**I need t**  
*Between*  
  
*and*

Choose the pickup library for this reservation:

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**Existing reservations for Smith, Alison:**

Type	Resource
Autocad 2010 in 2d and 3d : a modern perspective	30731101110454

## Creating a Pull List

Staff members can create a pull list to retrieve items from the stacks.

1. To create a pull list, select *Booking* → *Pull List*.
2. To find a pull list for your library, select a library from the dropdown box adjacent to *See pull list for library*.
3. You can decide how many days in advance you would like to select reserved items. Enter the number of days in the box adjacent to *Generate list for this many days hence*. For example, if you would like to pull items that are needed today, you can enter “1” in the box, and you will retrieve items that need to be pulled today.
4. Click *Fetch* to retrieve the pull list.



## Booking Pull List

See pull list for library:

Generate list for this many days hence:

5. The pull list will appear. Click *Print* to print the pull list.

File Edit Search Circulation Cataloging Acquisitions (Preview) Booking

1 Bib Record: AFC-9586 2 Patron Search 3 Booking Pull List 4 Bib Record: ACZ-6157

### Booking Pull List

See pull list for library:

Generate list for this many days hence:

Title or name	Barcode	Call number	Copy location	Copy number	Reservation details
Canada's coming of age, 1939-1945	0134108849677	D768 .I5 .C2888 1997 CD-ROM	STACKS	-	2010-01-19 09:30 - 2010-01-22 15:00 Williamson, Cynthia
Freud: living and dying	0134106241620	BF109.F74 S38	STACKS	-	2010-01-19 12:00 - 2010-01-21 15:00 Williamson, Cynthia
Learning Outlook 2000 scheduling	0134102895262	HD69.T54 L4278 1999	STACKS	-	2010-01-19 12:00 - 2010-01-22 16:30 Williamson, Cynthia
The budget plan	30731100809601	HJ2055 .C22 1999	STACKS	-	2010-01-19 12:23 - 2010-01-20 12:23 Carter, Jim
Project management	0134111022635	HD69.P75 P735 2000	STACKS	-	2010-01-20 09:00 - 2010-01-25 15:15 Williamson, Cynthia

## Capturing Items for Reservations

Staff members can capture items for reservations in one of two ways:

1. Use the Capture Resources menu item in the Booking module
2. Use the Capture Holds menu item in the Circulation module.

### Use the Booking Module to capture reservations:

1. In the staff client, select *Booking* → *Capture Resources*.
2. Enter the barcode of the items to be captured. Click *Capture*.
3. A *Capture Succeeded* message will appear to the right. Information about the item will appear below the message. You can print this information as a receipt and add it to the item if desired.

Booking Capture

### Capture Reserved Resources

Enter barcode:   Capture succeeded

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**Capture Information**

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This item need to be routed to **RESERVATION SHELF:**  
 Barcode: 30731000563001  
 Title: Chimp and the clown  
 Author: Carroll, Ruth

**Reserved for patron** Johnson, Bonnie  
 Barcode: 001173220

Request time: 2010-01-26 12:43  
 Reserved from: 2010-01-26 13:00 - 2010-01-26 13:30

Slip date: Tue Jan 26 12:45:31 2010  
 Printed by System Account, Administrator at FENNELL

**Use the Circulation Module to capture reservations:**

1. In the staff client, select *Circulation* → *Capture Holds*.
2. Enter the barcode of the item to be captured.
3. The item is captured and displays a note that it should be routed to the reservation shelf:

Check In or Process Item Auto-Print Hold and Transit Slips				
Call Number	Checkin Date	Location	Route To	Status
FJDKPYRN-DDTN		Stacks	RESERVATION SHELF	On reservation shelf

**Picking Up Reservations**

Staff members can help users pick up their reservations.

1. In the staff client, select *Booking* → *Pick Up Reservations*
2. Enter the user's barcode. Click *Go*.
3. The title available for pickup will appear. Highlight the title of the item to pick up, and click *Pick Up*.

### Reservations Pickup

Enter patron barcode:

**Johnson, Bonnie**

**Patron has these reservations ready for pickup:**

Title	Barcode	Start time
Chimp and the clown	30731000563001	2010-01-26 13:00

**Patron currently has these reservations out:**

*Patron has no more reservations out at this time.*

4. The screen will refresh to show that the patron has picked up the reservation.

### Reservations Pickup

Enter patron barcode:

**Johnson, Bonnie**

**Patron has these reservations ready for pickup:**

*Patron has no reservations ready for pickup at this time.*

**Patron currently has these reservations out:**

Title	Barcode	Pickup time
Chimp and the clown	30731000563001	2010-01-26 12:53

## Returning Reservations

Staff members can help users return their reservations. You can return a reservation in two ways:

1. Through the Booking Module
2. Through the Check In screen

**Return a reservation through the Booking Module:**

1. In the staff client, select *Booking* → *Return Reservations*.
2. You can return the item by patron or item barcode. Choose *Resource* or *Patron*, enter the barcode, and click *Go*.

**Reservations Return**

Return by barcode of

3. A pop up box will tell you that the item was returned. Click *OK*.
4. The screen will refresh to show the reservations that remain out and the resources that have been returned.

**Johnson, Bonnie**

**Patron currently has these reservations out:**

*Patron has no more reservations out at this time.*

**Patron has returned these resources today:**

Title	Barcode	Due time
Chimp and the clown	30731000563001	2010-01-28

**Return an item through the Check In screen:**

Alternatively, you can return an item by checking it in using the **Check In** screen. For example, if a reserved item is returned via the book drop, the circulator can check the item in, and the item will be directed to its shelving location. The reservation will appear as returned on the patron’s record.