Using the Booking Module

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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. To create a reservation, staff can search the catalog, enter a patron record, or use 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. For example, enter a title search for *autocad 2010*. Click *Submit Search*.**

3. **A result or list of results will appear. Select *Autocad 2010 in 2d and 3d*, 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*.**

5. The *Copy Details* will appear in a new row. In the *barcode* column, click the *book now* link.

6. A screen showing the title and barcodes of available copies will appear.

7. 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.

8. Select the pickup library from the dropdown box, *Choose the pickup library for this reservation.*

9. 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. For example, if the time for which the reservation is set has already passed, the boxes will appear in red. 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.

10. 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 select a barcode, and you click *Reserve Selected*, you will receive an error message. 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.

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.**

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:

1. **Select *Booking* → *Create or Edit Reservations***

2. **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. To reserve a room, for example, highlight *Room,* and click *Next*.**

3. **A screen showing the name of the available resource will appear.**

4. **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.**

5. **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. For example, if the time for which the reservation is set has already passed, the boxes will appear in red. 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.

6. 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 select a resource, and you click *Reserve Selected*, you will receive an error message. If you do not have a preference, you may click *Reserve Any*, and one of the resources will be pulled from the list.

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

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

Reserve a cataloged resource

1. To reserve a cataloged item, such as a book, enter the barcode in the box, and click *Next*.

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

Cancelling a Reservation

Staff members can cancel a patron's reservation through the *Create or Cancel Reservations* tab available in a patron's record. Staff members can also cancel a reservation immediately after it has been made.

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.***

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.**

Cancel a reservation immediately after it has been made.

1. **Create the reservation.**

2. Follow steps four through six in the section, *Enter the patron's record to cancel a reservation*, to cancel the reservation.

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.**

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

Capturing Items for Reservations

Staff members can capture items for 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.**

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*.**

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

Returning Reservations

Staff members can help users return their reservations.

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*.**

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.**