



Room Reserve

The Web-Based Room and Equipment
Reservation Management System

Version 6.0

User Manual

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TABLE OF CONTENTS

CHAPTER I. THE LOG-IN SCREEN..... 3

CHAPTER II. THE ROOM RESERVATION MAINTENANCE HOME PAGE 4

 Section 1. The Home Page..... 4

 Section 2. Security Access 5

CHAPTER III. RESERVATIONS 7

 Section 1. Making Reservations 7

 A. Calendar Views..... 8

 B. The Reservation Form 14

 C. Making a Reservation 18

 Section 2. Working with Existing Reservations: Requests/Reservations 30

 A. Reservation Categories 30

 B. Search/Filter..... 36

 C. Reservation Records 38

 D. The Reservation Form 39

 E. The Reservation Confirmation 42

 F. Working with Existing Reservations..... 42

 Section 3. Holidays and Other Closings 51

 A. Room Reserve Without Events..... 51

 B. Room Reserve With Events..... 52

 Section 4. Patron Reservation Lookup 52

 A. Instructions for Using Patron Reservation Lookup 54

CHAPTER IV. REPORTS..... 67

 Section 1. General Principles and Definitions 67

 A. Principles 67

 B. The Report Filter 67

 Section 2. The Reports 70

 A. Requested Equipment 70

 B. Requested Room Setups..... 71

 C. View/Print Room Schedules 72

 D. View/Print Detailed Room Schedules 74

 E. Room Usage Report 76

 F. Room Usage: Reservations vs. Events 77

 G. Room Utilization Report..... 78

 H. Requested Bookable Equipment Report 79

 I. View/Print Bookable Equipment Schedules 80

 J. Bookable Equipment Usage Report 82

 K. Equipment Utilization Report 83

 Section 3. Running Reports..... 84

CHAPTER V. DATABASE MANAGEMENT 85

 Section 1. Archiving Reservations..... 85

 A. Selective Archiving..... 85

 B. Bulk Archiving 86

Section 2. Deleting Reservations.....	87
A. General Principals.....	87
Section 3. Copying (or Restoring) an Archived Reservation	88
Section 4. Database Management and Statistical Reporting	89
APPENDIX A. INSTALLATION AND IMPLEMENTATION GUIDE.....	A-1
Section 1. System Requirements	A-1
Section 2. Installation Options	A-1
A. Library Server	A-1
B. Hosted Server	A-2
Section 3. Library Policy Consideration	A-2
Section 4. Security	A-2
Section 5. Implementation Recommendations	A-2
Section 6. Backup Recommendations.....	A-3
Section 7. Technical Support.....	A-3
APPENDIX B. System Configuration.....	B-1
Section 1. Multi-Branch Library Systems.....	B-1
Section 2. Configuring the System	B-1
A. Appearance (Style Configuration).....	B-1
B. Library Information	B-2
C. System Messages.....	B-5
D. System Templates	B-6
E. E-mail Templates	B-8
F. Email Settings (and Email Server Settings).....	B-9
G. Scheduling Automatic E-mail – The notify.bat File	B-15
H. Security	B-18
I. System Settings	B-19
J. Branch Specific Lists.....	B-23
Section 3. Configuring Rooms and Equipment.....	B-26
A. The Configuration Template	B-27
B. Supporting Templates.....	B-28
C. Configuring Rooms	B-47
D. Configuring Equipment	B-52
APPENDIX C. EVENTS AND ROOM RESERVE A GUIDE TO FUNCTIONS AND RESPONSIBILITIES	C-1

INTRODUCTION

Welcome to Room Reserve

Welcome to Room Reserve- a web-based reservation management system. This highly efficient system transforms paper-based and ad-hoc computer-based reservation procedures into a streamlined, organized system accessible to libraries and their patrons. Room Reserve:

- Allows libraries to maintain a computer database of rooms and locations (non-traditional meeting spaces),
- Maintain an inventory of equipment that can be reserved together with or separately from rooms,
- Maintain a reservations calendar,
- Create a cost basis for reserving rooms, equipment and catering,
- Maintain a record of fees and deposits paid, and
- Run reservation schedules and usage reports.

This manual is designed to provide users with a comprehensive description of the capabilities and functions of Room Reserve. Please contact Evanced Solutions, Inc. at support@evancedsolutions.com or **888-519-5770** with any questions or feedback about the system or the contents of this manual.

What's New in Room Reserve

Feature	Description
Style Configuration	<ul style="list-style-type: none"> • Separated Room Reserve and Events style sheet settings. • Adjusted style settings and spacing on room maintenance page.
Library Information	<ul style="list-style-type: none"> • Added an option to make a branch Private/Internal Only. • Added the ability to remove a library branch from the system. • Alternate Hours now spans the year boundary (i.e., November through April).
Patron Reservation Lookup	<ul style="list-style-type: none"> • Added "Show All Names". • Added more search options and ability to create a new reservation for an individual or organization directly from search results.
System Settings	<ul style="list-style-type: none"> • Added "Reservation Limits" option to limit requests to X per Y days per person.
Advanced Cost Classifications	<ul style="list-style-type: none"> • Added an option in Advanced Costing (Combination feature) to allow either for a flat fee or for a per hour charge after the first X hours.
Equipment Inventory	<ul style="list-style-type: none"> • Added quantity handling for independent equipment reservations.

Beyond Room Reserve

Evanced’s support and solutions of libraries extends beyond rooms and equipment to include events and special interest clubs and programs. Our solutions include:

A. Events

Events is a web-based program and event management system for libraries and their patrons.

Library Tools	Patron Tools
<ul style="list-style-type: none"> • Planning, scheduling, and marketing • On-line and staff-assisted registration • Registration and attendance tracking • Registration and attendance statistics • Subscriber lookup • Automated e-mail communication 	<ul style="list-style-type: none"> • On-line personal event calendar • Down events to personal calendar • Automated registration reminders by e-mail • Upcoming event subscriptions through e-mail

Like Room Reserve, Events works well as a standalone system and cross-functionally with Room Reserve.

B. Summer Reader

Summer Reader is a web-based communication and management tool that supports a library’s reading and special interest programs, such as summer reading programs, book clubs, anime clubs, etc.

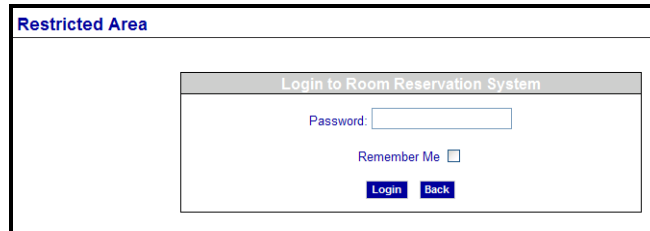
Summer Reader tools include:

Library Tools	Patron Tools
<ul style="list-style-type: none"> • Program planning, scheduling, and marketing • On-line and staff-assisted registration • Communication • Prizes and certificate management • Program logs and reviews • Program reports 	<ul style="list-style-type: none"> • Registration • Program logs and reviews • Print completion certificates

Please contact Evanced Solutions, Inc. for further information about either of these systems.

CHAPTER I. THE LOG-IN SCREEN

The system presents users with the login screen illustrated below when they attempt to access the system.



Restricted Area

Login to Room Reservation System

Password:

Remember Me

Remember Me saves a user's password to their computer and eliminates the need to re-enter the password if the user logs-off or the system times out (if idle for 90 minutes). Cookies must be enabled for Remember Me to work. This is a computer (not ID) specific function that only works on which the user computer activates it. You may elect to use Remember Me on one or more computers.

Evanced sets the initial system passwords and sends them to the library's representative.



Caution: We strongly recommend that library's change the initial factory set passwords to enhance and ensure the security of their system.

CHAPTER II. THE ROOM RESERVATION MAINTENANCE HOME PAGE

Section 1. The Home Page

All functions in Room Reserve originate from the Home Page. The options that appear depend on the configuration of the system and the password level used to access the system. A description of each feature appears following the illustration below.

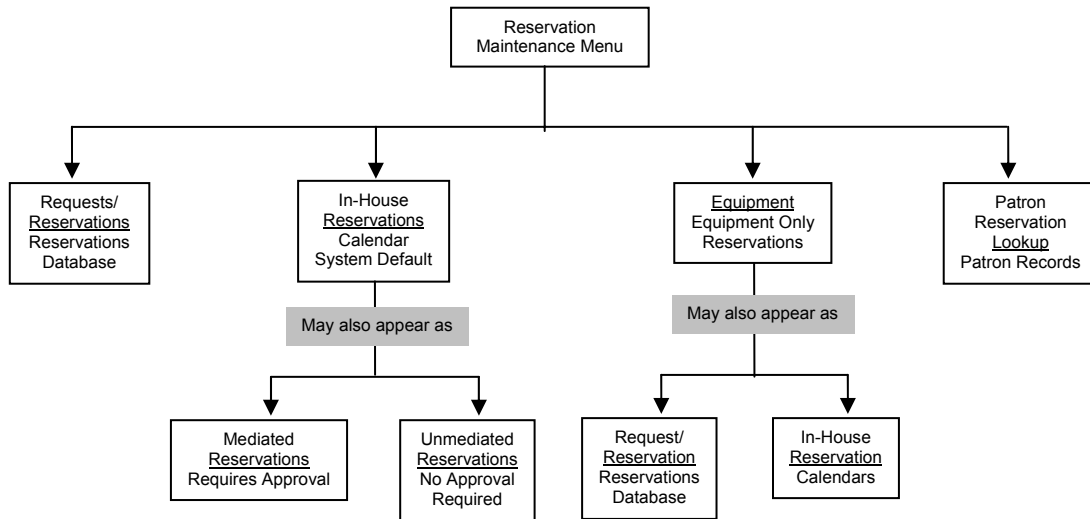
Note: The illustration below is a composite of the options that might appear on the Home Page depending on system configuration. Please see your library's home page for an accurate illustration.

*These equipment-related options appear only when the Administrator enables Equipment Inventory during configuration.

1. **Branch Selector:** The Branch Selector is a list of all branches in the library system. It only appears in multi-branch system configurations.
2. **Go to Events Maintenance:** *Go to Events Maintenance* is a hyperlink between Room Reserve and Events. It appears only when Events is installed and configured to work with Room Reserve.
3. **Tool Bar:** The tool bar beneath the title appears on all pages, except forms and templates. It allows quick and efficient navigation between system functions.

4. Function Menus:

A. Reservation Maintenance: Reservation Maintenance contains functions that allow you to work with reservations and patron records. The options that appear depend on your system configuration. The chart below illustrates the possible menu functions.



B. Reports: The Report menu provides links to filters that generate statistical and schedule reports. Users may export reports to Word or Excel for additional manipulation or inclusion into other documents. The system does not allow users to change the type and number of reports.

C. Quick Search: Quick Search allows users to perform key word searches of existing reservations. Quick Search ties into the Request/Reservations database.

D. Quick View: Quick View summarizes the quantity of records in each reservation category and provides a hyperlink to the corresponding database.

E. Setup: The Setup menu contains room and equipment (if applicable) configuration functions, including adding and deleting items from inventory. The information entered here appears wherever users select rooms (and equipment).

F. Settings: Settings is the system configuration menu. It is available at the Administrator level only.

Section 2. Security Access

The security level of passwords determines user access to functions on the Home Page. The table below illustrates the access assigned to each password level.

Security Level	Add	Edit	Delete	Read	Accept/Deny Pending Reservations ⁵	System Configuration
Read Only	√ ³			√		
Create Only	√ ⁴			√		
Staff ¹	√	√	√	√	√ ⁶	
Administration ²	√	√	√	√	√	√

¹Staff Level: Staff level users have access to all menus except Setup and Settings. Depending on the security level of the password (i.e., Read Only and Create), some reservation functions may require the approval of someone with higher security access.

²Administrator Level: The Administrator has full access to all menus and settings, including those that affect all branches in a multi-branch library system.

³Read Only Level: The ability of the Read Only level to add a reservation is the same as that granted to patrons. If patrons are limited to submitting reservations no earlier than 3 days prior to a reservation, then Read Only is also limited to adding reservations no more than 3 days before an event.


⁴Create Only Level: The Create Only level has intermediate privileges to add reservations. Any limits on advance reservations do not apply.

⁵Accept/Deny Reservations: Staff is the default level available for accepting and denying reservations, but this can be adjusted to any of the security levels by the Administrator in System Settings (Approval Password Level).

⁶Staff Level – Accept/Deny Reservations: To allow staff members to accept or deny reservations, the *Approval Password Level* (System Settings) must be set to “Staff Level” or lower.

CHAPTER III. RESERVATIONS

Reservation processes originate from the Reservation Maintenance menu. The options that appear on the menu depend on system configuration. Reservation Maintenance contains three primary functions regardless of configuration:

Menu Item	Function	Description
Requests/Reservations:	Database of existing reservations	The Requests/Reservations function allows users to manage existing reservations (i.e., view, edit, copy, delete and archive). It also contains the functions for managing Holidays and other closings when Room Reserve operates without Events. Otherwise, Events manages holidays and other closings.
In-House Requests:	Make Reservations	In-House Requests contains the information and tools – calendars, room and equipment inventory - necessary to complete reservations. Depending on system configuration, In-House Reservation may appear as <i>Mediated Reservations</i> and <i>Unmediated Reservations</i> . <i>Mediated Reservations</i> require secondary approval when submitted by patrons. The system automatically accepts <i>Unmediated Reservations</i> regardless of who submits the reservation. The system considers In-House Reservations mediated by default. This applies to Rooms only. Equipment Reservations are always mediated. Information in the remainder of this manual applies equally to mediated and unmediated reservations unless otherwise noted.  Note: The Home Page is the only place where the terms <i>Mediated</i> and <i>Unmediated</i> appear outside system settings. Once you access the reservation calendar, all references are to In-House Reservation Mode.
Patron Reservation Lookup:	Patron database	Patron Reservation Lookup contains a searchable database of all patrons who submitted a reservation. Patron records include a list of reservations with links to supporting Reservation Forms.

Section 1. Making Reservations

The In-House Reservations (*Reservation Maintenance* menu) contains the tools for making reservations. In-House Reservations may also appear as Mediated Reservations and Unmediated Reservations depending on system configuration. Regardless of the item reserved – room or equipment - the process for submitting reservations is the same. The information in this section references rooms, but applies to both rooms and equipment.

A. Calendar Views

In-House Reservations gives you access to various calendar views that help you submit a reservation. The configuration of your system determines which views you have available.

Day View

Day		Week					Month	Search/Recurring																																																																																																																																																															
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Tabs allow you to access different calendar views.

Room and date

Room Reservation

Event Reservation

*The meeting buffer is the time between the scheduled end of a meeting and the scheduled end of the reservation. This buffer gives library staff time to clean up and reset a room. The Administrator determines the amount of buffer time during configuration.



Note: *Room Reservations* appear in regular type and include a link ([VIEW]) to the Reservation Form. *Events* appear in bold-italic print and do not contain any links.

Day view displays the schedule for one room on one day and allows users to *select a date, time and room*. Regardless of the view in which you begin making a reservation, Day is view the final step in the reservation process. By default, the system displays the schedule for the first room on the Selection list for the current date.

At a glance, Day view tells you:

- The times that are available,
- Whether existing reservations are room or event reservations, and
- Whether an unavailable block of time represents actual meeting time or a buffer between reservations.

Day View features include:

1. *Date Selection* contains a monthly calendar. By default, it displays the current month. A drop down list provides access to a rolling 24 months (current plus the following 23 months). Arrows on either side of the drop down list allow you to scroll through the calendar one month at a time. The left arrow provides access to prior months that are not accessible from the drop down list.
2. *Selection* is the list of available rooms and locations available. A room's appearance on the list depends on:
 - The configuration of the system, including whether Room Reserve is a standalone application or enabled with Events, and how rooms are categorized (i.e., mediated or unmediated),
 - The configuration of each room - Public View Only, Public Full Access, or In-House Only, and

- How the user is accessing the system – as a Patron or Staff.

The table below describes the contents of the list based on system configuration.

Room Reserve Configuration	Rooms	Locations
Standalone	✓	✓
With Events*		✓

*Events controls the inventory of rooms.

If the system classifies rooms as Mediated and Unmediated, the Selection list contains only those rooms assigned to the selected category.

A pop-up window with detailed information about each room – capacity, fixtures, and additional information – is available by placing your mouse over the room name.

Multi-Branch Library System Note: In a multi-branch library system, the Selection list contains all available rooms in all branches categorized by branch.

3. *Time Selection* displays the schedule for the selected room on the selected date. By default, the system displays the schedule for the current date for the first room on the Selection List.
4. Continue: CONTINUE displays a blank Reservation Form with the date, time and room fields completed.
5. Back to Maintenance Page: BACK TO MAINTENANCE PAGE returns the user to the Home Page.

Week View

Day							Week							Month							Search/Recurring																																																																																										
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*The meeting buffer is the time between the scheduled end of a meeting and the scheduled end of the reservation. This buffer gives library staff time to clean up and reset a room. The Administrator determines the amount of buffer time during configuration.

Note: *Room Reservations* appear in regular type and include a link ([VIEW]) to the Reservation Form. *Events* appear in bold-italic print and do not contain any links.

Week view is a seven-day (Sunday – Saturday) time grid showing the availability of one room. The days of the week at the top of each column are hyperlinks to the Day view, which allows you to select a time and submit the reservation.

At a glance, Week view tells you:

- What days and times are available,
- Whether scheduled reservations are room reservations or event reservations, and
- Whether unavailable time is actual meeting time or a scheduled buffer.

Week view features include:

1. *Date Selection* contains a monthly calendar. By default, it displays the current month. A drop down list provides access to a rolling 24 months (current plus the following 23 months). Arrows on either side of the drop down list allow you to scroll through the calendar one month at a time. The left arrow provides access to prior months that do not appear in the drop down list.
2. *Selection* is the list of available rooms and locations available. A room’s appearance on the list depends on the following:
 - The configuration of the system, including whether Room Reserve is a standalone application or enabled with Events, and how rooms are categorized (i.e., In-House Reservations or Mediated and Unmediated Reservations),
 - The configuration of each room - Public View Only, Public Full Access, or In-House Only, and
 - How the user is accessing the system – as a Patron or Staff.


The table below describes the contents of the list based on system configuration.

Room Reserve Configuration	Rooms	Locations
Standalone	✓	✓
With Events*		✓

*Events controls the inventory of rooms.

If the system categorizes rooms as Mediated and Unmediated, the Selection list contains only those rooms assigned to the selected category.

A pop-up window with detailed information about each room – capacity, fixtures, and additional information – is available by placing your mouse over the room name.

 Multi-Branch Library System Note: In a multi-branch library system, the Selection list contains all available rooms in all branches categorized by branch.

3. Day Selection: Day Selection contains a seven-day time grid for one room. By default, the system displays the schedule for the first room on the Selection list.

The information on the time grid is limited to whether or not the room is available. Additional reservation information is available by placing your mouse over a reservation. The pop-up window displays the name of the organization, the reservation start and end time, the meeting start and end time, the status of the reservation (reserved, pending, etc), and the number of attendees.

4. Back to Maintenance Page: BACK TO MAINTENANCE PAGE returns the user to the Home Page.

Month View

		Day	Week	Month	Search/Recurring			
SELECTION		DATE SELECTION (In-House Room Reservation Mode)						
Expand All Collapse All		Room						
		<Prev <input type="text" value="Month-Year"/> Next>						
<input type="button" value="Refresh"/>		Sun	Mon	Tues	Wed	Thurs	Fri	Sat
<input type="checkbox"/> Checked/Uncheck All Rooms	Week##	<u>1</u> · Time · Organization · Room [View]	<u>2</u>	<u>3</u>	<u>4</u> · Time · Organization · Room [View]	<u>5</u>	<u>6</u>	<u>7</u> · Time · Organization · Room [View]
<input type="checkbox"/> Library Branch 1		Week##	<u>8</u>	<u>9</u> · Time · Organization · Room [View]	<u>10</u> · Time · Organization · Room [View]	<u>11</u>	<u>12</u>	<u>13</u> · Time · Organization · Room [View]
<input checked="" type="checkbox"/> Room 1			Week##	<u>15</u> · Time · Organization · Room [View]	<u>16</u>	<u>17</u> · Time · Organization · Room [View]	<u>18</u>	<u>19</u>
<input type="checkbox"/> Room 2	Week##			<u>22</u>	<u>23</u> · Time · Organization · Room [View]	<u>24</u>	<u>25</u>	<u>26</u> · Time · Organization · Room [View]
<input type="checkbox"/> Room 3		Week##		<u>29</u>	<u>30</u>			
<input type="checkbox"/> Library Branch 2								
<input type="checkbox"/> Room 1								
<input type="checkbox"/> Room 2								
<input type="checkbox"/> Room 3								
<input type="button" value="Refresh"/>								

Note: *Room Reservations* appear in regular type and include a link ([VIEW]) to the Reservation Form. *Events* appear in bold-italic print and do not contain any links.

Month View displays a calendar month containing the schedule of one or more rooms. The calendar dates contain hyperlinks to the Day View, which allows you to select a time and submit the reservation. This view displays either the selected date for the selected room or the first room on the Selection list. Double check the date and room reference above the calendar to make sure the calendar displays the desired schedule.

At a glance, Month View tells you:

- What is scheduled in the selected rooms for the selected month, and
- The basic details of each reservation, including the name of the organization, the reservation's start and end time, including reservation buffers, and the room.

Additional reservation information is available by placing your mouse over a reservation or, when available, clicking on the link ([VIEW]) to the Reservation Form.

Month view features include:

1. *Selection* is the list of rooms and locations available. A room's appearance on the list depends on the following:
 - How the Administrator configured the system, including the activation of Events and whether any of the rooms are unmediated.
 - How rooms are configured (i.e., Public View Only, Public Full Access, or In-House Only), and
 - How the user is accessing the system – as a Patron or Staff.


The table below describes the contents of the list based on system configuration.

Room Reserve Configuration	Rooms	Locations
Standalone	✓	✓
With Events*		✓

*Events manages the inventory of rooms.

If the system classifies rooms as Mediated and Unmediated, the Selection list will only contain those rooms assigned to the selected category. For example, if you selected Unmediated Reservations from the Home Page, the system will only display unmediated rooms in the Selection List.

A pop-up window with detailed information about each room – capacity, fixtures, and additional information – is available by placing your mouse over the room name.

 **Multi-Branch Library System Note:** In a multi-branch library system, the Selection list contains all available rooms in all branches categorized by branch.

2. *Date Selection* displays a calendar month that contains the schedule of one or more selected rooms. By default, the system displays the schedule for the current month for the first room on the Selection list. At the top of the calendar is a Month-Year drop down list that provides access to a rolling 24 months (current plus the following 23 months). <Prev and Next> on either side of the drop down list allow you to scroll through the calendar one month at a time. <Prev provides access to prior months that are not accessible from the drop down list.
3. Back to Maintenance Page: BACK TO MAINTENANCE PAGE returns the user to the Home Page.

Search/Recurring View

Day	Week	Month	Search/Recurring																
SEARCH SELECTION		SEARCH RESULTS (In-House Room Reservation Mode)																	
*Start Date [Date Entry Field] <input type="button" value="Pick"/>		[Please include set up and take down times.]																	
Recurrence <input type="radio"/> One Time <input checked="" type="radio"/> Daily <input type="radio"/> Every [1] days <input checked="" type="radio"/> Every weekday <input type="radio"/> Weekly <input checked="" type="radio"/> Every [1] weeks on . . . <input type="checkbox"/> Sun <input type="checkbox"/> Mon <input type="checkbox"/> Tues <input type="checkbox"/> Wed <input type="checkbox"/> Thurs <input type="checkbox"/> Fri <input type="checkbox"/> Sat <input type="radio"/> Monthly <input checked="" type="radio"/> Day [22] of every [1] month(s) <input type="radio"/> The [first] [day] of every [1] month(s) <input type="radio"/> Additional Dates Date: <input type="text"/> Month <input type="text"/> Day <input type="text"/> Year <input type="button" value="Pick"/> <input type="button" value="Add Date"/> <input type="button" value="Clear Last Date"/> <input type="button" value="Clear All"/> [Date Entry Field]		Matching Results <table border="1" style="width:100%; border-collapse: collapse;"> <thead> <tr> <th></th> <th>Room Name</th> <th>Start Time</th> <th>End Time</th> <th>Date(s)</th> </tr> </thead> <tbody> <tr> <td><input type="button" value="Select"/></td> <td>Room 1</td> <td>8:00 AM <input type="text"/></td> <td>8:30 AM <input type="text"/></td> <td>6/25/2007, 6/26/2007, 6/27/2007,</td> </tr> <tr> <td><input type="button" value="Select"/></td> <td>Room 3</td> <td>8:00 AM <input type="text"/></td> <td>8:30 AM <input type="text"/></td> <td>6/25/2007, 6/26/2007, 6/27/2007</td> </tr> </tbody> </table>			Room Name	Start Time	End Time	Date(s)	<input type="button" value="Select"/>	Room 1	8:00 AM <input type="text"/>	8:30 AM <input type="text"/>	6/25/2007, 6/26/2007, 6/27/2007,	<input type="button" value="Select"/>	Room 3	8:00 AM <input type="text"/>	8:30 AM <input type="text"/>	6/25/2007, 6/26/2007, 6/27/2007	
	Room Name	Start Time	End Time	Date(s)															
<input type="button" value="Select"/>	Room 1	8:00 AM <input type="text"/>	8:30 AM <input type="text"/>	6/25/2007, 6/26/2007, 6/27/2007,															
<input type="button" value="Select"/>	Room 3	8:00 AM <input type="text"/>	8:30 AM <input type="text"/>	6/25/2007, 6/26/2007, 6/27/2007															
Ends: <input type="text"/> Ends After/Ends By <input type="text"/> [7] Occurrences		Results with Issues Issues with Room 1 <table border="1" style="width:100%; border-collapse: collapse;"> <thead> <tr> <th>Issue</th> <th>Room Name</th> <th>Date</th> <th>Reservation Start/End Time</th> </tr> </thead> <tbody> <tr> <td>Available Remove Change</td> <td>Room 1</td> <td>6/25/2007</td> <td>10:30 AM <input type="text"/> 11:00 AM</td> </tr> <tr> <td>Conflict Remove Change</td> <td>Room 1</td> <td>6/26/2007</td> <td>----</td> </tr> <tr> <td>Removed Restore</td> <td>Room 1</td> <td>6/27/2007</td> <td>9:00 AM <input type="text"/> : 9:30 AM</td> </tr> </tbody> </table>		Issue	Room Name	Date	Reservation Start/End Time	Available Remove Change	Room 1	6/25/2007	10:30 AM <input type="text"/> 11:00 AM	Conflict Remove Change	Room 1	6/26/2007	----	Removed Restore	Room 1	6/27/2007	9:00 AM <input type="text"/> : 9:30 AM
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*Reservation Length: <input type="text"/> .05 <input type="text"/> Hour(s)		<table border="1" style="width:100%; border-collapse: collapse;"> <thead> <tr> <th>Issue</th> <th>Room Name</th> <th>Date</th> <th>Reservation Start/End Time</th> </tr> </thead> <tbody> <tr> <td>Room Closed</td> <td>Room 3</td> <td>----</td> <td>----</td> </tr> </tbody> </table>		Issue	Room Name	Date	Reservation Start/End Time	Room Closed	Room 3	----	----								
Issue	Room Name	Date	Reservation Start/End Time																
Room Closed	Room 3	----	----																
Number of People in Your Group: <input type="text"/> [##]		Issues with Room 3 <table border="1" style="width:100%; border-collapse: collapse;"> <thead> <tr> <th>Issue</th> <th>Room Name</th> <th>Date</th> <th>Reservation Start/End Time</th> </tr> </thead> <tbody> <tr> <td>Room Closed</td> <td>Room 3</td> <td>----</td> <td>----</td> </tr> </tbody> </table>		Issue	Room Name	Date	Reservation Start/End Time	Room Closed	Room 3	----	----								
Issue	Room Name	Date	Reservation Start/End Time																
Room Closed	Room 3	----	----																
*Selection: Expand All Collapse All <input checked="" type="checkbox"/> Check All/Uncheck All <input type="checkbox"/> Room 1 <input type="checkbox"/> Room 2 <input type="checkbox"/> Room 3		<input type="button" value="Select"/>																	
Time Range: <input type="text"/> Hr <input type="text"/> : <input type="text"/> Min <input type="text"/> AM/PM <input type="text"/> TO <input type="text"/> Hr <input type="text"/> : <input type="text"/> Min <input type="text"/> AM/PM <input type="text"/>																			
<input type="button" value="Search"/> <input type="button" value="Back to Maintenance Page"/>																			

*Items with an asterisk are required.

Note: Grayed out fields are hidden until the associated recurrence is selected.

The Search/Recurring view allows you to search the calendar database for available dates, times and rooms and submit reservations, including recurring reservations.

Search/Recurring contains the following features:

1. **Search Selection:** The Search Selection table contains the information necessary to select a date, time and room. The system displays results in the Search Results table.
 - A. *Start Date* refers to the date from which the search begins.
 - B. *Recurrence* refers to how often the reservation occurs – once, daily weekly, monthly, or selected dates.
 - C. *End* appears in connection with recurring reservations and refers to the number of times the meeting will take place.

- D. *Reservation Length* refers to the duration of the meeting as determined by the Meeting Start Time and Meeting End Time. Reservation Length excludes set-up and clean-up time. The system automatically adds a buffer between reservations, if the buffer has been enabled in System Settings. The time intervals in the drop list and the maximum reservation length allowed are system settings determined by the System Administrator.
- E. *Number of People in Your Group* refers to the anticipated number of attendees. The system compares this information against room capacity to select appropriate locations.
- F. *Selection* is the list of available rooms and locations. A room's appearance on the list depends on:
 - The configuration of the system, including whether Room Reserve is a standalone application or enabled with Events, and whether rooms are categorized as mediated and/or unmediated,
 - The configuration of each room - Public View Only, Public Full Access, or In-House Only, and
 - Who is accessing the system (i.e., Patron or Staff).

The table below describes the contents of the list based on system configuration.

Room Reserve Configuration	Rooms	Locations
Standalone	✓	✓
With Events*		✓

*Events manages the inventory of rooms.

If the system classifies rooms as Mediated and Unmediated, the Selection list contains only those rooms assigned to the selected category.

A pop-up window with detailed information about each room – capacity, fixtures, and additional information – is available by placing your mouse over the room name.

Multi-Branch Library System Note: In a multi-branch library system, the Selection list contains all available rooms in all branches categorized by branch.

- G. *Time Range* the range of time during which the meeting can occur.
 - H. *Search* activates the system's calendar search.
 - I. *BACK TO MAINTENANCE PAGE* returns the user to the Home Page.
2. Search Results: Results of the search appear in the Search Results table. The table contains two sections:
- *Matching Results* match the search criteria with no conflict. Each line item includes a link (SEARCH) to the Reservation Form.
 - *Results with Issues* contains information about other rooms that may not be available, but might work if the listed issues can be resolved. Issues might involve a schedule conflict, a room closure, room capacity, etc. When an issue involves a recurring meeting, the system allows you to remove or change individual dates.

B. The Reservation Form

Note: The information in this section applies to both Room Reservations and Equipment Reservations. The Administrator must enable Equipment Inventory in System Settings in order to reserve equipment without a room. For clarity and efficiency, this section limits its references to rooms.

The Reservation Form is the tool used to submit reservations. It contains reservation, contact and census information. The Reservation Form is a highly customizable form that may differ from library to library and room to room. The Administrator determines what fields appear, what to label them and whether the field is required or optional. See *Appendix B, Section 3 - Configuring Rooms and Equipment for further information*. Required information is marked with an asterisk (*).

There are two templates that support and determine the configuration of the Reservation Form.

The table below describes the fields available. It is **not an illustration of an actual Reservation Form**. Section headings are included for convenience only.

<u>Field</u>	<u>Options</u>	<u>Description</u>	<u>Field Status</u>	<u>Supporting Template</u>								
Meeting Policy		The Meeting Policy button provides a link to the room usage policy.	Optional	System Settings								
REQUEST INFORMATION												
Room Name:	[Room Name] or [Equipment Name]	The system automatically inserts the room selected on the Room Request page.	Fixed	----								
Date(s):	[Event Date]	The system automatically inserts the date selected on the Room Request page.	Fixed	----								
Library Card:	If you have previously used the system, you can enter your Card Number and click the Quick Entry number. [#####]	The system's configuration determines the appearance and configuration of this field.	Optional	Contact Form								
NOTE:	[Note]	NOTE is a System Message. To configure the text for NOTE select System Configuration & Settings → System Messages → Library Card Note.	Optional	Contact Form								
Meeting Times:	<table border="1"> <tr> <td>Reservation Start</td> <td>Meeting Start Time</td> <td>Meeting End Time</td> <td>Reservation End time</td> </tr> <tr> <td>[Time]</td> <td>Time ↓</td> <td>Time ↓</td> <td>[Time]</td> </tr> </table>	Reservation Start	Meeting Start Time	Meeting End Time	Reservation End time	[Time]	Time ↓	Time ↓	[Time]	The system automatically inserts the selections made on the Room Request page. Use the drop down list to revise a Meeting Start Time and Meeting End Time.	Fixed	----
Reservation Start	Meeting Start Time	Meeting End Time	Reservation End time									
[Time]	Time ↓	Time ↓	[Time]									
Number of Attendees:	[##]	<i>Number of Attendees</i> refers to the anticipated number of participants.	Optional	Contact Form								
CONTACT INFORMATION												
Organization (or) Organization/ Purpose	[Text Entry Field]	Organization refers to the company, agency or organization sponsoring the meeting. This field has autofill capability based upon previous entries, which supports consistency in data entry.	Optional	Contact Form								

<u>Field</u>	<u>Options</u>	<u>Description</u>	<u>Field Status</u>	<u>Supporting Template</u>
Purpose	[Text Entry Field]	This field appears if enabled on the Contact Form Template. Purpose refers why the participants are meeting.	Optional	Contact Form
Name of Card Holder or Contact Person's Name	[Text Entry Field]	The Library Card Number setting controls the appearance of this field. When "Name of Card Holder" is disabled, this field becomes "Contact Person's Name".	Fixed	----
Primary Phone	[Number Entry Field]	The phone number where library staff are most likely to reach the meeting contact.	Optional	Contact Form
Alternate Phone:	[Number Entry Field]	A secondary phone number where library staff may reach the contact.	Optional	Contact Form
Address 1	[Text Entry Field]	The first line of an address most likely corresponding to a company name or street address.	Optional	Contact Form
Address 2	[Text Entry Field]	The second line of an address most likely corresponding to a street address, if not already given in Address 1.	Optional	Contact Form
City	[Text Entry Field]	The city corresponding to Address 1 and Address 2.	Optional	Contact Form
State	State List ↓	The state corresponding to the city portion of the address. See System Settings → Enable State Entry.	Optional	Contact Form
Fax Number	[Number Entry Field]	The contact's fax number.	Optional	Contact Form
E-mail	[Text Entry Field]	The contact's e-mail address.	Optional	Contact Form
Notes:	[Text Entry Field]	Notes allows users to enter additional information pertinent to the reservation.	Optional	Contact Form
Custom Questions 1-6:	Answer formats include: • [Text Entry Field], • [Drop Down List], or • [Yes/No]	Libraries may customize up to six questions on a Reservation Form. Questions may be the same or different for each room.	Optional	Contact Form
Meeting Policy		The Meeting Policy button provides a link to the room usage policy.	Optional	System Settings

<u>Field</u>	<u>Options</u>	<u>Description</u>	<u>Field Status</u>	<u>Supporting Template</u>
COST CLASSIFICATION				
Select a Cost Classification	<input type="radio"/> Cost Classification 1 <input type="radio"/> Cost Classification 2	Cost Classifications relate to fees and deposits charged in connection with reservations. See System Settings → Enable Advanced Costs.	Optional	Costing Template
Is the organization a non-profit?	<input type="radio"/> Yes <input type="radio"/> No	The Room Configuration Form controls the appearance of this field. The Contract Item → Non-Profit Checking field must be set to "Required" or "Information Only".	Optional	Room Configuration
ROOM SETUP				
Room Setup:	<input type="radio"/> Option A <input type="radio"/> Option B View Room Setup Options	Room Setup defines the arrangement of furniture in a room.	Optional	Room Setup
CATEGORY LIST				
Select the Organization's Category Type	<input type="text" value="Organization Type"/>	Organization Type allows libraries to gather statistical information about their patrons.	Optional	Room Configuration (enable/disable) and Group Type/Category List (Branch Specific List)(create it)
Would you like the reservation to appear on the Event calendar?	<input type="radio"/> Yes <input type="radio"/> No	This field appears when Room Reserve and Events work together and when enabled.	Optional	Room Configuration
Event Type for Displaying on the Calendar	<input type="text" value="Event Type List"/>	This field appears when Room Reserve and Events work together and when.	Optional	Room Configuration
OPTIONAL ITEMS:				
The following items are available upon request for the selected room. This does not guarantee that the requested item(s) will be available. We will make every attempt to reserve the requested items.				
<input type="checkbox"/> Equipment 1 <input type="checkbox"/> Equipment 2 <input type="checkbox"/> Equipment 3		Equipment that is not a fixture in a room.	Optional	Room Configuration and Equipment Configuration (or Equipment List (Branch Specific List)).

C. Making a Reservation

How To Do It - Day View

Note: Day View only appears when enabled by your Administrator.

- Beginning at the Home Page, click the desired reservation link on the Reservation Maintenance menu. Your system's configuration determines which menu options appear on your Reservation Maintenance menu.

Reservation Maintenance
Rooms:
<ul style="list-style-type: none"> • Requests/Reservations • In-House Reservations <li style="padding-left: 20px;">(or) <li style="padding-left: 20px;">➤ Mediated Reservations <li style="padding-left: 20px;">➤ Unmediated Reservations
Equipment:
<ul style="list-style-type: none"> • Requests/Reservations • In-House Reservations
Patron Reservation Lookup

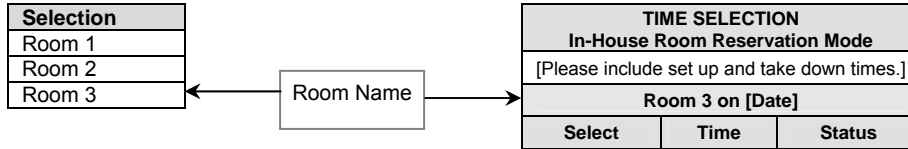
The system displays the default view of your Room Request page. Your system's configuration determines your default view.

Multi-Branch Library System Note: The default view is a branch setting. Consequently, the default view may differ among branches.

- View:** If Day view is your default view, proceed to the next step. Otherwise, click on the Day tab. The system displays the schedule for the current date for the first room on the Selection list, as illustrated below.

Day	Week	Month	Search/Recurring
DATE SELECTION			
← Month - Year ▾ →			
Sun	Mon	Tues	Wed
Thurs	Fri	Sat	
1	2	3	4
5	6	7	8
9	10	11	12
13	14	15	16
17	18	19	20
21	22	23	24
25	26	27	28
29	30		
SELECTION			
Room 1			
Room 2			
Room 3			
TIME SELECTION			
In-House Room Reservation Mode			
[Please include set up and take down times.]			
Room 1 on [Date]			
Select	Time	Status	
<input type="checkbox"/>	8:30 AM – 9:00 AM	OPEN	
<input type="checkbox"/>	9:00 AM – 9:30 AM	OPEN	
	9:30 AM – 10:00 AM	Organization [Status] [View]	
	10:00 AM – 10:30 AM		
<input type="checkbox"/>	10:30 AM – 11:00 AM	OPEN	
<input type="checkbox"/>	11:00 AM – 11:30 AM	OPEN	
<input type="checkbox"/>	11:30 AM – 12:00 AM	OPEN	
<input type="checkbox"/>	12:00 AM – 12:30 AM	OPEN	
<input type="checkbox"/>	12:30 AM – 1:00 AM	OPEN	
<input type="checkbox"/>	1:00 AM – 1:30 AM	OPEN	
Continue		Back to Maintenance	

3. **Room:** Click the desired room on the Selection list. The system displays the selected room's schedule for the current date in the Time Selection table.



4. **Date:** Click on the desired date on the Date Selection calendar. Use the drop down list or arrows to select an alternate month. The system displays the selected date next to the Room name in the header of the Time Selection table.

DATE SELECTION						
← Month – Year ↓ →						
Sun	Mon	Tues	Wed	Thurs	Fri	Sat
1	2	3	4	5	6	7
8	9	10	11	12	13	14
15	16	17	18	19	20	21
22	23	24	25	25	26	27
28	29	30				

5. **Time:** Select a time by clicking the check box(es) associated with setup time + meeting time + takedown time. If your reservation covers more than two time slots, click the start time and end time. The system marks everything in between.

Note: The system generates an error if there is an attempt to select a time frame that exceeds the maximum time allowed by your system's configuration: "Reservation can only be a maximum of [##] hours long! Override system setting? OK | Cancel". Click OK to override the system setting and continue with the reservation or CANCEL to select a new end time.

TIME SELECTION (In-House Room Reservation Mode)		
[Please include set up and take down times.]		
Room 1 on [Date]		
Select	Time	Status
<input type="checkbox"/>	8:30 AM – 9:00 AM	OPEN
<input checked="" type="checkbox"/>	9:00 AM – 9:30 AM	OPEN
<input checked="" type="checkbox"/>	9:30 AM – 10:00 AM	OPEN
<input checked="" type="checkbox"/>	10:00 AM – 10:30 AM	OPEN
<input type="checkbox"/>	10:30 AM – 11:00 AM	OPEN
	11:00 AM – 11:30 AM	Organization [Status][View]
	11:30 AM – 12:00 AM	

← **Check the beginning time.**
 ← The system checks the time in between.
 ← **Check the end time.**
 ← Meeting time.
 ← Clean up buffer.

6. Click CONTINUE to submit the reservation. The system displays the Reservation Form.
7. Complete the Reservation Form. Be sure to complete all required (*) fields. The system will not verify or submit an incomplete reservation.

A. **RECALL PREVIOUS REGISTRANT***: Click RECALL PREVIOUS REGISTRANT to insert the contact information from the previous reservation into the Reservation Form.

Note: This function requires the enabling of Cookies.

*RECALL PREVIOUS REGISTRANT is an optional Reservation Form configuration that autofills the contact information from the previous Registration Form into a new blank form. As an optional configuration, it may or may not appear as an option on your system.

8. Click VERIFY REQUEST at the end of the Reservation Form. The system verifies the completeness of the reservation and displays the completed reservation form for review.
9. Review the Reservation Form to ensure that all information is correct.
 - Note:** The accuracy and consistency of patron information affect Patron Reservation Lookup. Errors and inconsistencies may result in multiple records for a single patron.
10. Select one of the following to complete the reservation:
 - A. *Cancel the Reservation:* Click CANCEL to close the Reservation Form without saving. The system returns to the Room Request page. Proceed with a new reservation or use the tool bar to select another function.
 - B. *Modify the Reservation:* Click your browser's back button to return to the Reservation Form in Edit Mode. Revise the reservation as needed and continue with Step 8 above.
 - C. *Finalize the Reservation:* Click SUBMIT REQUEST to save the reservation to the calendar. Continue with Step 11 below.
11. When a user successfully submits a reservation, the system posts the reservation to the calendar and displays the confirmation illustrated below. The system e-mails a copy of the confirmation to the e-mail address shown on the Reservation Form.

The request is complete for: Contact: [Contact Name] Room: [Room Name] Date(s): [Event Date] Time: [Event Time] Please note the status of the request is: [Status] The confirmation number is: [Confirmation Number]			
<table border="0"> <tr> <td>Back to Maintenance Page</td> <td>New Request</td> <td>Another Request</td> </tr> </table>	Back to Maintenance Page	New Request	Another Request
Back to Maintenance Page	New Request	Another Request	

12. Close out of the confirmation by selecting one of the following:
 - A. BACK TO MAINTENANCE PAGE returns the user to the Home Page.
 - B. NEW REQUEST returns the user to the Room Request Page to make a reservation for a new contact. The Reservation Form for a new request is blank.
 - C. ANOTHER REQUEST returns the user to the Room Request Page to make another reservation for the same contact. The system copies the previous Reservation Form as a template for the new reservation. The only difference between the previous and new Reservation Form is the date, time and room.

How To Do It - Week View

Note: Week only appears when enabled by your Administrator.

1. Beginning at the Home Page, click the desired reservation link on the Reservation Maintenance menu. Your system's configuration determines the options that appear.

<p>Reservation Maintenance</p> <p>Rooms:</p> <ul style="list-style-type: none"> • Requests/Reservations • In-House Reservations (or) ➤ Mediated Reservations ➤ Unmediated Reservations <p>Equipment:</p> <ul style="list-style-type: none"> • Requests/Reservations • In-House Reservations <p>Patron Reservation Lookup</p>
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The system displays the Room Request page default. Your system configuration determines your default view.

Multi-Branch Library System Note: The default view is a branch setting. Consequently, the default view may differ among branches depending on system configuration.

2. **View:** If Week view is your default view, proceed to the next step. Otherwise, click on the Week tab. The system displays the weekly schedule for the current week for the first room on the Selection list (illustrated below).

		Day		Week		Month		Search/Recurring					
DATE SELECTION							DAY SELECTION (In-House Room Reservation Mode)						
← Month – Year ↓ →													
Sun	Mon	Tue	Wed	Thur	Fri	Sat	Room 1 from [Date] to [Date]						
1	2	3	4	5	6	7	Sun	Mon	Tue	Wed	Thu	Fri	Sat
8	9	10	11	12	13	14	8:00 AM	8:00 AM	8:00 AM	8:00 AM [View]	8:00 AM	8:00 AM	8:00 AM
15	16	17	18	19	20	21	8:30 AM	8:30 AM	8:30 AM	8:30 AM [View]	8:30 AM	8:30 AM	8:30 AM
22	23	24	25	26	27	28	9:00 AM	9:00 AM	9:00 AM	9:00 AM	9:00 AM	9:00 AM	9:00 AM
29	30						9:30 AM	9:30 AM	9:30 AM [View]	9:30 AM	9:30 AM	9:30 AM	9:30 AM
SELECTION							10:00 AM	10:00 AM	10:00 AM [View]	10:00 AM	10:00 AM	10:00 AM	10:00 AM
Room 1							10:30 AM	10:30 AM	10:30 AM	10:30 AM	10:30 AM [View]	10:30 AM	10:30 AM
Room 2							11:00 AM	11:00 AM	11:00 AM	11:00 AM	11:00 AM [View]	11:00 AM	11:00 AM
Room 3							11:30 AM	11:30 AM	11:30 AM	11:30 AM [View]	11:30 AM	11:30 AM	11:30 AM
							12:00 AM	12:00 AM	12:00 AM	12:00 AM	12:00 AM	12:00 AM	12:00 AM
							12:30 PM	12:30 PM	12:30 PM	12:30 PM	12:30 PM	12:30 PM	12:30 PM
							Back to Maintenance						

3. **Room:** Click the desired room on the Selection list. The system displays the selected room's schedule for the current week in the Day Selection table.

Selection
Room 1
Room 2
Room 3

4. **Date:** Click on the desired date on the Date Selection calendar. Use the drop down list or arrows to select an alternate month. The system displays the selected date in the header of the Day Selection table.

DATE SELECTION						
← Month – Year ↓ →						
Sun	Mon	Tues	Wed	Thurs	Fri	Sat
1	2	3	4	5	6	7
8	9	10	11	12	13	14
15	16	17	18	19	20	21
22	23	24	25	25	26	27
28	29	30				

5. **Day:** Click on the day of the week (Sun, Mon, Tues, etc.) to select a day. The system displays Day view (illustrated below). Double check the room referenced in the Time Selection table header to ensure the desired room appears.

Day		Week		Month		Search/Recurring	
DATE SELECTION							
← Month – Year ↓ →							
Sun	Mon	Tues	Wed	Thurs	Fri	Sat	
<u>1</u>	<u>2</u>	<u>3</u>	<u>4</u>	<u>5</u>	<u>6</u>	<u>7</u>	
<u>8</u>	<u>9</u>	<u>10</u>	<u>11</u>	<u>12</u>	<u>13</u>	<u>14</u>	
<u>15</u>	<u>16</u>	<u>17</u>	<u>18</u>	<u>19</u>	<u>20</u>	<u>21</u>	
<u>22</u>	<u>23</u>	<u>24</u>	<u>25</u>	<u>25</u>	<u>26</u>	<u>27</u>	
<u>28</u>	<u>29</u>	<u>30</u>					
SELECTION							
Room 1							
Room 2							
Room 3							
Continue Back to Maintenance							

6. **Time:** Select a time by clicking the check box(es) associated with setup time + meeting time + takedown time. If your reservation covers more than two time slots, click the start time and end time. The system marks everything in between.

Note: The system generates an error if there is an attempt to select a time frame that exceeds the maximum time allowed by your system’s configuration: “Reservation can only be a maximum of [##] hours long! Override system setting? OK | Cancel”. Click ok to override the system setting and continue with the reservation or CANCEL to select a new end time.

TIME SELECTION (In-House Room Reservation Mode)		
[Please include set up and take down times.]		
Room 1 on [Date]		
Select	Time	Status
<input type="checkbox"/>	8:30 AM – 9:00 AM	OPEN
<input checked="" type="checkbox"/>	9:00 AM – 9:30 AM	OPEN
<input checked="" type="checkbox"/>	9:30 AM – 10:00 AM	OPEN
<input checked="" type="checkbox"/>	10:00 AM – 10:30 AM	OPEN
<input type="checkbox"/>	10:30 AM – 11:00 AM	OPEN
	11:00 AM – 11:30 AM	Organization [Status][View]
	11:30 AM – 12:00 AM	

- ← Check the beginning time.
- ← The system checks the time in between.
- ← Check the end time.
- ← Meeting time.
- ← Clean up buffer.

7. Click CONTINUE to submit the reservation. The system displays the Reservation Form.
8. Complete the Reservation Form. Be sure to complete all required (*) fields. The system will not verify or submit an incomplete reservation.
 - A. **RECALL PREVIOUS REGISTRANT***: Click RECALL PREVIOUS REGISTRANT to insert the contact information from the previous reservation into the Reservation Form.

Note: This function requires the enabling of Cookies.

*RECALL PREVIOUS REGISTRANT is an optional Reservation Form configuration that autofills the contact information from the previous Registration Form into a new blank form. As an optional configuration, it may or may not appear as an option on your system.

9. Click VERIFY REQUEST at the end of the Reservation Form. The system verifies the completeness of the reservation and displays the completed reservation form for review.
10. Review the Reservation Form to ensure that all information is correct.
 - Note:** The accuracy and consistency of patron information affect Patron Reservation Lookup. Errors and inconsistencies may result in multiple records for a single patron.
11. Select one of the following to complete the reservation:
 - A. *Cancel the Reservation:* Click CANCEL to close the Reservation Form without saving. The system returns to the Room Request page. Proceed with a new reservation or use the tool bar to select another Room Reserve function.
 - B. *Modify the Reservation:* Click your browser's back button to return to the Reservation Form in Edit Mode. Revise the reservation as needed and continue with Step 9 above.
 - C. *Finalize the Reservation:* Click SUBMIT REQUEST to save the reservation to the calendar. Continue with Step 12 below.
12. The system posts the successfully submitted reservations to the calendar and displays the confirmation illustrated below. The system e-mails a copy of the confirmation to the e-mail address shown on the Reservation Form.

<p>The request is complete for: Contact: [Contact Name] Room: [Room Name] Date(s): [Event Date] Time: [Event Time] Please note the status of the request is: [Status] The confirmation number is: [Confirmation Number]</p>
<p style="text-align: center;"> <input type="button" value="Back to Maintenance Page"/> <input type="button" value="New Request"/> <input type="button" value="Another Request"/> </p>

13. Close out of the confirmation by selecting one of the following:
 - A. BACK TO MAINTENANCE PAGE returns the user to the Home Page.
 - B. NEW REQUEST returns the user to the Room Request Page to make a reservation for a new contact. The Reservation Form for a new request is blank.
 - C. ANOTHER REQUEST returns the user to the Room Request page to make another reservation for the same contact. The system copies the previous Reservation Form as a template for the new reservation. The only difference between the previous and new Reservation Form is the date, time and room.

How To Do It - Month View

Note: Month only appears when enabled by your Administrator.

1. Beginning at the Home Page, click the desired reservation link on the Reservation Maintenance menu. Your system configuration determines which menu options appear.

<p>Reservation Maintenance</p> <p>Rooms:</p> <ul style="list-style-type: none"> • Requests/Reservations • In-House Reservations <li style="padding-left: 20px;">(or) <li style="padding-left: 20px;">➤ Mediated Reservations <li style="padding-left: 20px;">➤ Unmediated Reservations <p>Equipment:</p> <ul style="list-style-type: none"> • Requests/Reservations • In-House Reservations Patron Reservation Lookup
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The system displays the Room Request page default view. The default view is determined during system configuration.

Multi-Branch Library System Note: The default view is a branch setting. Consequently, the default view may differ among branches depending on system configuration.


2. **View:** If Month view is your default view, proceed to the next step. Otherwise, click on the Month tab. The system displays the monthly schedule for the current month for the first room on the Selection list (illustrated below).

	Day	Week	Month	Search/Recurring			
SELECTION							
<input type="checkbox"/> Checked/Uncheck All Rooms							
<input checked="" type="checkbox"/> Room 1							
<input type="checkbox"/> Room 2							
<input type="checkbox"/> Room 3							
DATE SELECTION (In-House Room Reservation Mode)							
Room							
<Prev <input type="text" value="Month - Year"/> Next>							
	Sun	Mon	Tues	Wed	Thurs	Fri	Sat
1 • Time • Organization • Room [View]	2	3	4 • Time • Organization • Room [View]	5	6	7 • Time • Organization • Room [View]	8
9	10 • Time • Organization • Room [View]	11 • Time • Organization • Room [View]	12	13 • Time • Organization • Room [View]	14	15	16
17 • Time • Organization • Room [View]	18	19	20	21	22	23 • Time • Organization • Room [View]	24
25	26 • Time • Organization • Room [View]	27	28	29	30		

3. **Room(s):**
 - A. Click the desired room(s) on the Selection list or click Check/Uncheck All Rooms to display the schedule for all rooms.
 - B. Click REFRESH. The system displays in the Date Selection table the schedule for the current month for the selected room(s).
4. **Month:** Select the desired month using the drop down list, <Prev or Next>. The system displays the selected month.
5. **Date:** Click on the desired date (i.e., 1, 2, 3, etc.). The system displays the Day view (illustrated below).

		Day		Week		Month		Search/Recurring		
DATE SELECTION							TIME SELECTION (In-House Room Reservation Mode)			
← Month - Year ↓ →							[Please include set up and take down times.]			
Room 1 on [Date]										
Sun	Mon	Tues	Wed	Thurs	Fri	Sat	Select	Time	Status	
1	2	3	4	5	6	7	<input type="checkbox"/>	8:30 AM – 9:00 AM	OPEN	
8	9	10	11	12	13	14	<input type="checkbox"/>	9:00 AM – 9:30 AM	OPEN	
15	16	17	18	19	20	21		9:30 AM – 10:00 AM	Organization [Status] [View]	
22	23	24	25	25	26	27		10:00 AM – 10:30 AM		
28	29	30					<input type="checkbox"/>	10:30 AM – 11:00 AM	OPEN	
SELECTION							<input type="checkbox"/>	11:00 AM – 11:30 AM	OPEN	
Room 1							<input type="checkbox"/>	11:30 AM – 12:00 AM	OPEN	
Room 2							<input type="checkbox"/>	12:00 AM – 12:30 AM	OPEN	
Room 3							<input type="checkbox"/>	12:30 AM – 1:00 AM	OPEN	
							<input type="checkbox"/>	1:00 AM – 1:30 AM	OPEN	
							<input type="button" value="Continue"/>		<input type="button" value="Back to Maintenance"/>	

- Room:** Double check the room referenced in the Time Selection table. If necessary, click on the desired room in the Selection list or go to the next step.
- Time:** Select a time by clicking the check box(es) associated with setup time + meeting time + takedown time. If your reservation covers more than two time slots, click the start time and end time. The system marks everything in between.

 **Note:** The system generates an error if there is an attempt to select a time frame that exceeds the maximum time allowed by your system's configuration: "Reservation can only be a maximum of [##] hours long! Override system setting? OK | Cancel". Click ok to override the system setting and continue with the reservation or CANCEL to select a new end time.

TIME SELECTION (In-House Room Reservation Mode)		
[Please include set up and take down times.]		
Room 1 on [Date]		
Select	Time	Status
<input type="checkbox"/>	8:30 AM – 9:00 AM	OPEN
<input checked="" type="checkbox"/>	9:00 AM – 9:30 AM	OPEN
<input checked="" type="checkbox"/>	9:30 AM – 10:00 AM	OPEN
<input checked="" type="checkbox"/>	10:00 AM – 10:30 AM	OPEN
<input type="checkbox"/>	10:30 AM – 11:00 AM	OPEN
	11:00 AM – 11:30 AM	Organization [Status][View]
	11:30 AM – 12:00 AM	

- ← **Check the beginning time.**
- ← The system checks the time in between.
- ← **Check the end time.**
- ← Meeting time.
- ← Clean up buffer.

- Click CONTINUE to submit the reservation. The system displays the Reservation Form.
- Complete the Reservation Form. Be sure to complete all required (*) fields. The system will not verify or submit an incomplete reservation.
 - RECALL PREVIOUS REGISTRANT*:** Click RECALL PREVIOUS REGISTRANT to insert the contact information from the previous reservation into the Reservation Form.

 **Note:** This function requires the enabling of Cookies.

*RECALL PREVIOUS REGISTRANT is an optional Reservation Form configuration that autofills the contact information from the previous Registration Form into a new blank form. As an optional configuration, it may or may not appear as an option on your system.

10. Click VERIFY REQUEST at the end of the Reservation Form. The system verifies the completeness of the reservation and displays the completed reservation form for review.
11. Review the Reservation Form to ensure that all information is correct.
 - Note:** The accuracy and consistency of patron information affect Patron Reservation Lookup. Errors and inconsistencies may result in multiple records for a single patron.
12. Select one of the following to complete the reservation:
 - A. *Cancel the Reservation:* Click CANCEL to close the Reservation Form without saving. The system returns to the Room Request page. Proceed with a new reservation or use the tool bar to select another Room Reserve function.
 - B. *Modify the Reservation:* Click your browser's back button to return to the Reservation Form in Edit Mode. Revise the reservation as needed and continue with Step 10 above.
 - C. *Finalize the Reservation:* Click SUBMIT REQUEST to save the reservation to the calendar. Continue with Step 13 below.
13. The system posts a successfully submitted reservation to the calendar and displays the confirmation illustrated below. The system e-mails a copy of the confirmation to the e-mail address shown on the Reservation Form.

The request is complete for: Contact: [Contact Name] Room: [Room Name] Date(s): [Event Date] Time: [Event Time] Please note the status of the request is: [Status] The confirmation number is: [Confirmation Number]			
<table border="0"> <tr> <td>Back to Maintenance Page</td> <td>New Request</td> <td>Another Request</td> </tr> </table>	Back to Maintenance Page	New Request	Another Request
Back to Maintenance Page	New Request	Another Request	

14. Close out of the confirmation by selecting one of the following:
 - A. BACK TO MAINTENANCE PAGE returns the user to the Home Page.
 - B. NEW REQUEST returns the user to the Room Request page to make a reservation for a new contact. The Reservation Form for a new reservation is blank.
 - C. ANOTHER REQUEST returns the user to the Room Request page to make another reservation for the same contact. The system copies the previous Reservation Form as a template for the new reservation. The only difference between the previous and new Reservation Form is the date, time and room.

How To Do It - Search/Recurring

Note: The Search/Recurring view only appears when enabled by your Administrator.

1. Beginning at the Home Page, click the desired reservation link on the Reservation Maintenance menu. Your system configuration determines the options that appear.

Reservation Maintenance Rooms: <ul style="list-style-type: none"> • Requests/Reservations • In-House Reservations (or) ➤ Mediated Reservations ➤ Unmediated Reservations Equipment: <ul style="list-style-type: none"> • Requests/Reservations • In-House Reservations

The system displays the Room Request page default view. The default view is determined during system configuration.

Multi-Branch Library System Note: The default view is a branch setting. Consequently, the default view may differ among branches depending on system configuration.

2. **View:** If Search/Recurring is your default view, go to the next step. Otherwise, click on the Search/Recurring tab. The system displays the Search/Recurring filter (illustrated below).

Day	Week	Month	Search/Recurring
SEARCH SELECTION		SEARCH RESULTS (In-House Room Reservation Mode)	
*Start Date [Date Entry Field] <input type="button" value="Pick"/>		[Please include set up and take down times.]	
Recurrence <input checked="" type="radio"/> One Time <input type="radio"/> Daily <input type="radio"/> Every [1] days <input checked="" type="radio"/> Every weekday <input type="radio"/> Weekly <input checked="" type="radio"/> Every [1] weeks on . . . <input type="checkbox"/> Sun <input type="checkbox"/> Mon <input type="checkbox"/> Tues <input type="checkbox"/> Wed <input type="checkbox"/> Thurs <input type="checkbox"/> Fri <input type="checkbox"/> Sat <input type="radio"/> Monthly <input checked="" type="radio"/> Day [22] of every [1] month(s) <input type="radio"/> The [first] [day] of every [1] month(s) <input type="radio"/> Additional Dates Date: <input type="text" value="Mo"/> <input type="text" value="Day"/> <input type="text" value="Yr"/> <input type="button" value="Pick"/> <input type="button" value="Add Date"/> <input type="button" value="Clear Last Date"/> <input type="button" value="Clear All"/> [Date Entry Field]		Use the search options to select a start date, reservation length, and room selections. Click the Search button to start the search.	
Ends: <input type="text" value="Ends After/Ends By"/> [7] Occurrences			
*Reservation Length: <input type="text" value=".05"/> <input type="text" value="Hour(s)"/>			
Number of People in Your Group: <input type="text" value="##"/>			
*Selection: <input type="button" value="Expand All"/> <input type="button" value="Collapse All"/> <input checked="" type="checkbox"/> Check All/Uncheck All <input type="checkbox"/> Room 1 <input type="checkbox"/> Room 2 <input type="checkbox"/> Room 3			
Time Range: <input type="text" value="Hr"/> : <input type="text" value="Min"/> <input type="text" value="AM/PM"/> TO <input type="text" value="Hr"/> : <input type="text" value="Min"/> <input type="text" value="AM/PM"/>			
<input type="button" value="Search"/> <input type="button" value="Back to Maintenance Page"/>			

3. Enter into the Search Selection table the desired search criteria.
4. Click SEARCH. The system displays search results in the Search Results table (illustrated below).

Day	Week	Month	Search/Recurring																
SEARCH SELECTION		SEARCH RESULTS (In-House Room Reservation Mode)																	
*Start Date [Date Entry Field] <input type="button" value="Pick"/>		[Please include set up and take down times.]																	
Recurrence <input type="radio"/> One Time <input checked="" type="radio"/> Daily <input type="radio"/> Every [1] days <input checked="" type="radio"/> Every weekday <input type="radio"/> Weekly <input checked="" type="radio"/> Every [1] weeks on ... <input type="checkbox"/> Sun <input type="checkbox"/> Mon <input type="checkbox"/> Tues <input type="checkbox"/> Wed <input type="checkbox"/> Thurs <input type="checkbox"/> Fri <input type="checkbox"/> Sat <input type="radio"/> Monthly <input checked="" type="radio"/> Day [22] of every [1] month(s) <input type="radio"/> The [first] [day] of every [1] month(s) <input type="radio"/> Additional Dates Date: <input type="text" value="Mo"/> <input type="text" value="Day"/> <input type="text" value="Yr"/> <input type="button" value="Pick"/> <input type="button" value="Add Date"/> <input type="button" value="Clear Last Date"/> <input type="button" value="Clear All"/> [Date Entry Field]		Matching Results <table border="1"> <thead> <tr> <th></th> <th>Room Name</th> <th>Start Time</th> <th>End Time</th> <th>Date(s)</th> </tr> </thead> <tbody> <tr> <td><input type="button" value="Select"/></td> <td>Room 1</td> <td>8:00 AM ↓</td> <td>[8:30 AM]</td> <td>6/25/2007, 6/26/2007, 6/27/2007,</td> </tr> <tr> <td><input type="button" value="Select"/></td> <td>Room 3</td> <td>8:00 AM ↓</td> <td>[8:30 AM]</td> <td>6/25/2007, 6/26/2007, 6/27/2007</td> </tr> </tbody> </table>			Room Name	Start Time	End Time	Date(s)	<input type="button" value="Select"/>	Room 1	8:00 AM ↓	[8:30 AM]	6/25/2007, 6/26/2007, 6/27/2007,	<input type="button" value="Select"/>	Room 3	8:00 AM ↓	[8:30 AM]	6/25/2007, 6/26/2007, 6/27/2007	
	Room Name	Start Time	End Time	Date(s)															
<input type="button" value="Select"/>	Room 1	8:00 AM ↓	[8:30 AM]	6/25/2007, 6/26/2007, 6/27/2007,															
<input type="button" value="Select"/>	Room 3	8:00 AM ↓	[8:30 AM]	6/25/2007, 6/26/2007, 6/27/2007															
Ends: <input type="text" value="Ends After/Ends By"/> [7] Occurrences		Results with Issues Issues with Room 1 <table border="1"> <thead> <tr> <th>Issue</th> <th>Room Name</th> <th>Date</th> <th>Reservation Start/End Time</th> </tr> </thead> <tbody> <tr> <td>Available Remove Change</td> <td>Room 1</td> <td>6/25/2007</td> <td>10:30 AM ↓ 11:00 AM</td> </tr> <tr> <td>Conflict Remove Change</td> <td>Room 1</td> <td>6/26/2007</td> <td>----</td> </tr> <tr> <td>Removed Restore</td> <td>Room 4</td> <td>6/27/2007</td> <td>9:00 AM ↓ 9:30 AM</td> </tr> </tbody> </table>		Issue	Room Name	Date	Reservation Start/End Time	Available Remove Change	Room 1	6/25/2007	10:30 AM ↓ 11:00 AM	Conflict Remove Change	Room 1	6/26/2007	----	Removed Restore	Room 4	6/27/2007	9:00 AM ↓ 9:30 AM
Issue	Room Name	Date	Reservation Start/End Time																
Available Remove Change	Room 1	6/25/2007	10:30 AM ↓ 11:00 AM																
Conflict Remove Change	Room 1	6/26/2007	----																
Removed Restore	Room 4	6/27/2007	9:00 AM ↓ 9:30 AM																
*Reservation Length: <input type="text" value=".05"/> Hour(s)		<input type="button" value="Select"/>																	
Number of People in Your Group: [##]		Issues with Room 3 <table border="1"> <thead> <tr> <th>Issue</th> <th>Room Name</th> <th>Date</th> <th>Reservation Start/End Time</th> </tr> </thead> <tbody> <tr> <td>[Issue]</td> <td>Room 3</td> <td>----</td> <td>----</td> </tr> </tbody> </table>		Issue	Room Name	Date	Reservation Start/End Time	[Issue]	Room 3	----	----								
Issue	Room Name	Date	Reservation Start/End Time																
[Issue]	Room 3	----	----																
*Selection: Expand All Collapse All <input checked="" type="checkbox"/> Check All/Uncheck All <input type="checkbox"/> Room 1 <input type="checkbox"/> Room 2 <input type="checkbox"/> Room 3																			
Time Range: Hr ↓ : Min ↓ AM/PM ↓ TO Hr ↓ : Min ↓ AM/PM ↓																			
<input type="button" value="Search"/> <input type="button" value="Back to Maintenance Page"/>																			

5. Select a result using one of the following options.

A. Matching Results:

(i) Click SELECT associated with the desired option. The system displays the Reservation Form. Go to Step 6.

B. Results with Issues: The system sorts issues by room. Only recurring events include links that allow you to remove, restore or change a date.

(i) To remove a date from a series, click REMOVE. This strikes the line item, but does not delete it.

(ii) To restore a date, click RESTORE. This removes the strike and restores the line item to the active list.

(iii) To change a date or time, click CHANGE. The system opens the Room Request page in a new window. This version of the Room Request page allows you to change a date and time, but does not allow you to change the room.

(a) Select a new date and time. See How To Do It - Day View (page 18) for more information.

(b) Click SUBMIT. The system saves the change, closes the Room Request page and returns to the Search/Recurring view.

- (iv) Click SELECT. The system displays the Reservation Form.
- 6. Complete the Reservation Form. Be sure to complete all required (*) fields. The system will not verify or submit an incomplete reservation.
 - A. RECALL PREVIOUS REGISTRANT*: Click RECALL PREVIOUS REGISTRANT to insert the contact information from the previous reservation into the Reservation Form.
 - 👉 **Note:** This function requires the enabling of cookies.
- 7. Click VERIFY REQUEST at the end of the Reservation Form. The system verifies the completeness of the reservation and displays the completed reservation form for review.
- 8. Review the Reservation Form to ensure that all information is correct.
 - 👉 **Note:** The accuracy and consistency of patron information impacts Patron Reservation Lookup. Errors and inconsistencies may result in multiple records for a single patron.
- 9. Select one of the following options to complete the reservation process:
 - A. *Cancel the Reservation:* Click CANCEL to close the Reservation Form without saving. The system returns to the Room Request page. Proceed with a new reservation or use the tool bar to select another Room Reserve function.
 - B. *Modify the Reservation:* Click your browser's back button to return to the Reservation Form in Edit Mode. Revise the reservation as needed and continue with Step 9 above.
 - C. *Finalize the Reservation:* Click SUBMIT REQUEST to save the reservation to the calendar. Continue with Step10 below.
- 10. The system posts a successfully submitted reservation to the calendar. The system e-mails a copy of the confirmation to the Contact's e-mail address shown on the Reservation Form. The illustration below depicts a recurring reservation confirmation.

<p>Request 1 of 2 The request is complete for: Contact: [Contact Name] Room: [Room Name] Date(s): [Event Date] Time: [Event Time] The confirmation number is: [Confirmation Number] Please note the status of the request is: [Status]</p> <p>Request 2 of 2 The request is complete for: Contact: [Contact Name] Room: [Room Name] Date(s): [Event Date] Time: [Event Time] The confirmation number is: [Confirmation Number] Please note the status of the request is: [Status]</p> <p style="text-align: center;"> <input type="button" value="Back to Maintenance Page"/> <input type="button" value="New Request"/> <input type="button" value="Another Request"/> </p>
--

- 11. Close out of the confirmation by selecting one of the following:
 - A. BACK TO MAINTENANCE PAGE returns the user to the Home Page.
 - B. NEW REQUEST returns the user to the Room Request page to make a reservation for a new contact. The Reservation Form for a new request is blank.

*RECALL PREVIOUS REGISTRANT is an optional Reservation Form configuration that autofills the contact information from the previous Registration Form into a new blank form. As an optional configuration, it may or may not appear as an option on your system.

- C. ANOTHER REQUEST returns the user to the Room Request page to make another reservation for the same contact. The system copies the previous Reservation Form as a template for the new reservation. The only difference between the previous and new Reservation Form is the date, time and room.

Section 2. Working with Existing Reservations: Requests/Reservations

Requests/Reservations (Reservation Maintenance menu) contains a database of existing reservations. This function allows you to:

- Approve pending reservations,
- Enter payments received for room deposits and fees,
- View, edit, and copy reservations,
- Delete and archive reservations,
- View reservation confirmations, and
- Submit and view holiday and other closings.

A. Reservation Categories

The Requests/Reservations database is categorized by status – Pending Requests, Pending Payments, Accepted Reservations, Archive Reservations, and Holidays/Closing or All Reservations. The table below describes each category.

View	Descriptions	Search Filter/ Record Sort Options							Information Table			
		Room	Organization	Internal	Keyword	Reserve Date	List Mode	Delete History Information	Reservation Description	Requested On	Internal	Status
Pending Requests	Pending Requests require follow-up, which may include accepting and denying reservations. Denied Reservations that require follow-up and Late Payments appear in bold-italic print. The Requested On field reflects the date the reservation was submitted or denied.	✓	✓		✓	✓	✓		✓	✓		
Pending Payments	Pending Requests are Accepted Reservations with an outstanding fee or deposit.	✓	✓		✓	✓	✓		✓	✓		
Accepted Reservations	Accepted Reservations are confirmed reservations that have no outstanding fees or issues.	✓	✓	✓	✓	✓	✓		✓	✓	✓	

View	Descriptions	Search Filter/ Record Sort Options							Information Table			
		Room	Organization	Internal	Keyword	Reserve Date	List Mode	Delete History Information	Reservation Description	Requested On	Internal	Status
Archived Reservations	Archived Reservations do not appear in the active reservations database and do not appear on the reservation calendar, but do remain accessible to the Reports function.	✓	✓	✓	✓	✓	✓	✓	✓	✓	✓	✓
Holiday/Closings	Holidays/Closings lists special dates and times (i.e., Christmas, Federal holidays, etc.) when a room or the library is closed. This category is visible at the Administrator level only. When Room Reserve works with Events, Holiday/Closings becomes an Events function and the system replaces this option with All Reservations.	✓	✓		✓	✓	✓		✓	✓		
All Reservations	The All Reservations category replaces Holidays/Closings when Events works with Room Reserve. It is an aggregate list of reservations appearing in the other reservation categories.								✓			

See Section 2.B - Search/Filter (page 36) for additional information about the Search/Filter.

Pending Requests and Pending Payments

Room Request/Reservation Maintenance							Text Size T T T				
Home		Reservation Maintenance		Reports		Setup		System Settings		About	Logout: [Level]
Add Holiday/Room Closing ¹ Bulk Archive											
Pending Requests (##)		Pending Payments (##)		Accepted Reservations (##)		Archived Reservations		Holiday/Closings ²			
Search/Filter		PENDING ROOM REQUESTS									
Room: <input type="text" value="Rooms"/>		Sort Results By: <input type="text" value="Reservation Information"/> Descending Order Ascending Order									
Organization: <input type="text"/>		Archive									
Keyword: <input type="text"/>											
Reservation Date: <input type="radio"/> All <input type="radio"/> Today <input type="radio"/> This Week <input type="radio"/> This Month <input type="radio"/> Range: <input type="text"/> [Date Entry field] Pick TO <input type="text"/> [Date Entry field] Pick <input checked="" type="checkbox"/> Combine recurring reservations Search											
List Mode: No Scroll Scroll											
Back to Maintenance Page											
										Archive	
		Description									
		Archive View Edit Single Copy Single Delete Confirmation							Requested On		
		Organization: Board Meeting Room: Board Room Date: Monday, March 12, 2007 Start: 12:00 PM Meeting Time: 12:00 P Meeting End Time: 1:00 PM End: 1:00 PM Single Date Reservation							3/1/2007		
		Archive Archive Recurring View Recurring Edit Recurring Copy Recurring							3/1/2007		
		Organization: Girl Scouts Meeting Room: Community Room B Date: 3/1/2007, 3/15/2007, 4/1/2007 Start: 12:00 PM Meeting Time: 12:00 PM Meeting End Time: 2:30 PM End: 2:30 PM Recurring Reservation – Combine Recurring Reservations Checked							3/1/2007		
		Archive View Archive Recurring Edit Single View Recurring Copy Single Edit Recurring Delete Copy Recurring Confirmation							3/1/2007		
		Organization: Girl Scouts Meeting Room: Community Room B Date: 3/1/2007 Start: 12:00 PM Meeting Time: 12:00 PM Meeting End Time: 2:30 PM End: 2:30 PM Recurring Reservation – Combine Recurring Reservations Unchecked							3/1/2007		
		Archive									

¹ The Add Holiday/Room Closing button only appears when Room Reserve is a standalone application.

² The Holiday/Closings category becomes All Reservations when Events is installed and enabled.

Accepted Reservations

Room Request/Reservation Maintenance							Text Size T T T															
Home	Reservation Maintenance	Reports	Setup	System Settings	About	Logoff: [Level]																
Add Holiday/Room Closing ¹ Bulk Archive																						
Pending Requests (##)		Pending Payments (##)		Accepted Reservations (##)		Archived Reservations		Holiday/Closings ²														
Search/Filter							ACCEPTED ROOM RESERVATIONS															
Room: <input type="text" value="Rooms"/>																						
Organization: [Text entry field]																						
Internal <input type="text" value="Classification List"/>																						
Keyword: [Text entry field]																						
Reservation Date: <input checked="" type="radio"/> All <input type="radio"/> Today <input type="radio"/> This Week <input type="radio"/> This Month <input type="radio"/> Range: [Date Entry field] <input type="button" value="Pick"/>																						
TO [Date Entry field] <input type="button" value="Pick"/>																						
<input checked="" type="checkbox"/> Combine recurring reservations																						
<input type="button" value="Search"/>																						
List Mode: No Scroll <input type="button" value="Scroll"/>																						
Back to Maintenance Page																						
							Sort Results By: <input type="text" value="Reservation Information"/> Descending Order Ascending Order															
							<input type="button" value="Archive"/>															
							<table border="1" style="width:100%; border-collapse: collapse;"> <thead> <tr> <th style="width: 70%;">Description</th> <th style="width: 10%;">Requested On</th> <th style="width: 20%;">INTERNAL</th> </tr> </thead> <tbody> <tr> <td> Archive View Edit Single Copy Single Delete Confirmation Organization: Board Meeting Room: Board Room Date: Monday, March 12, 2007 Single Date Reservation Start: 12:00 PM Meeting Time: 12:00 P Meeting End Time: 1:00 PM End: 1:00 PM </td> <td style="text-align: center;">3/1/2007</td> <td style="text-align: center;">Canceled by Patron</td> </tr> <tr> <td> Archive Archive Recurring View Recurring Edit Recurring Copy Recurring Organization: Girl Scouts Meeting Room: Community Room B Date: 3/1/2007, 3/15/2007, 4/1/2007 Recurring Reservation – Combine Recurring Reservations Checked Start: 12:00 PM Meeting Time: 12:00 PM Meeting End Time: 2:30 PM End: 2:30 PM </td> <td style="text-align: center;">3/1/2007</td> <td></td> </tr> <tr> <td> Archive Archive Recurring View Recurring Edit Recurring Copy Recurring Organization: Girl Scouts Meeting Room: Community Room B Date: 3/1/2007 Recurring Reservation – Combine Recurring Reservations Unchecked Start: 12:00 PM Meeting Time: 12:00 PM Meeting End Time: 2:30 PM End: 2:30 PM </td> <td style="text-align: center;">3/1/2007</td> <td></td> </tr> </tbody> </table>				Description	Requested On	INTERNAL	Archive View Edit Single Copy Single Delete Confirmation Organization: Board Meeting Room: Board Room Date: Monday, March 12, 2007 Single Date Reservation Start: 12:00 PM Meeting Time: 12:00 P Meeting End Time: 1:00 PM End: 1:00 PM	3/1/2007	Canceled by Patron	Archive Archive Recurring View Recurring Edit Recurring Copy Recurring Organization: Girl Scouts Meeting Room: Community Room B Date: 3/1/2007, 3/15/2007, 4/1/2007 Recurring Reservation – Combine Recurring Reservations Checked Start: 12:00 PM Meeting Time: 12:00 PM Meeting End Time: 2:30 PM End: 2:30 PM	3/1/2007		Archive Archive Recurring View Recurring Edit Recurring Copy Recurring Organization: Girl Scouts Meeting Room: Community Room B Date: 3/1/2007 Recurring Reservation – Combine Recurring Reservations Unchecked Start: 12:00 PM Meeting Time: 12:00 PM Meeting End Time: 2:30 PM End: 2:30 PM	3/1/2007	
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							<input type="button" value="Archive"/>															

¹ The Add Holiday/Room Closing button only appears when Room Reserve is a standalone application.

² The Holiday/Closings category becomes All Reservations when Events is installed and enabled.

Archived Reservations

Room Request/Reservation Maintenance						Text Size T T T		
Home	Reservation Maintenance	Reports	Setup	System Settings	About	Logoff:[Level]		
Add Holiday/Room Closing¹ Bulk Archive								
Pending Requests (##)		Pending Payments (##)		Accepted Reservations (##)		Archived Reservations		Holiday/Closings ²

<p>Search/Filter</p> <p>Room: Rooms ▾</p> <p>Organization: [Text entry field]</p> <p>Internal Classification List ▾</p> <p>Keyword: [Text entry field]</p> <p>Reservation Date: <input checked="" type="radio"/> All <input type="radio"/> Today <input type="radio"/> This Week <input type="radio"/> This Month <input type="radio"/> Range: [Date Entry field] Pick TO [Date Entry field] Pick <input checked="" type="checkbox"/> Combine recurring reservations Search </p> <p>List Mode: No Scroll Scroll</p> <p>Delete History Information: Select Ending Date: [Date Entry Field] Pick Delete Reservations </p> <p style="text-align: center;">Back to Maintenance Page</p>	<p style="text-align: center;">ARCHIVED RESERVATIONS</p> <p>Sort Results By: Reservation Information ▾ Descending Order Ascending Order</p> <p style="text-align: center;">Delete</p> <table border="1" style="width:100%; border-collapse: collapse;"> <thead> <tr> <th style="width:70%;"></th> <th style="width:10%;">Requested On</th> <th style="width:10%;">INTERNAL</th> <th style="width:10%;">STATUS</th> </tr> </thead> <tbody> <tr> <td> <input type="checkbox"/> Delete View Edit Single Copy Single Delete Confirmation Organization: Board Meeting Room: Board Room Date: Monday, March 12, 2007 Single Date Reservation Start: 12:00 PM Meeting Time: 12:00 PM Meeting End Time: 1:00 PM End: 1:00 PM </td> <td style="text-align: center;">3/1/2007</td> <td style="text-align: center;">Canceled by Patron</td> <td style="text-align: center;">3/1/2007</td> </tr> <tr> <td> <input type="checkbox"/> Delete Archive Recurring View Recurring Edit Recurring Copy Recurring Organization: Girl Scouts Meeting Room: Community Room B Date: 3/1/2007, 3/15/2007, 4/1/2007 Recurring Reservation – Combine Recurring Reservations Checked Start: 12:00 PM Meeting Time: 12:00 PM Meeting End Time: 2:30 PM End: 2:30 PM </td> <td style="text-align: center;">3/1/2007</td> <td style="text-align: center;"></td> <td style="text-align: center;">Pending Payment</td> </tr> <tr> <td> <input type="checkbox"/> Delete Archive Recurring View Recurring Edit Recurring Copy Recurring Organization: Girl Scouts Meeting Room: Community Room B Date: 3/1/2007 Recurring Reservation – Combine Recurring Reservation Deselected Start: 12:00 PM Meeting Time: 12:00 PM Meeting End Time: 2:30 PM End: 2:30 PM </td> <td style="text-align: center;">3/1/2007</td> <td style="text-align: center;">Pending Review</td> <td style="text-align: center;"></td> </tr> <tr> <td style="text-align: center;">Delete</td> <td></td> <td></td> <td></td> </tr> </tbody> </table>		Requested On	INTERNAL	STATUS	<input type="checkbox"/> Delete View Edit Single Copy Single Delete Confirmation Organization: Board Meeting Room: Board Room Date: Monday, March 12, 2007 Single Date Reservation Start: 12:00 PM Meeting Time: 12:00 PM Meeting End Time: 1:00 PM End: 1:00 PM	3/1/2007	Canceled by Patron	3/1/2007	<input type="checkbox"/> Delete Archive Recurring View Recurring Edit Recurring Copy Recurring Organization: Girl Scouts Meeting Room: Community Room B Date: 3/1/2007, 3/15/2007, 4/1/2007 Recurring Reservation – Combine Recurring Reservations Checked Start: 12:00 PM Meeting Time: 12:00 PM Meeting End Time: 2:30 PM End: 2:30 PM	3/1/2007		Pending Payment	<input type="checkbox"/> Delete Archive Recurring View Recurring Edit Recurring Copy Recurring Organization: Girl Scouts Meeting Room: Community Room B Date: 3/1/2007 Recurring Reservation – Combine Recurring Reservation Deselected Start: 12:00 PM Meeting Time: 12:00 PM Meeting End Time: 2:30 PM End: 2:30 PM	3/1/2007	Pending Review		Delete			
	Requested On	INTERNAL	STATUS																		
<input type="checkbox"/> Delete View Edit Single Copy Single Delete Confirmation Organization: Board Meeting Room: Board Room Date: Monday, March 12, 2007 Single Date Reservation Start: 12:00 PM Meeting Time: 12:00 PM Meeting End Time: 1:00 PM End: 1:00 PM	3/1/2007	Canceled by Patron	3/1/2007																		
<input type="checkbox"/> Delete Archive Recurring View Recurring Edit Recurring Copy Recurring Organization: Girl Scouts Meeting Room: Community Room B Date: 3/1/2007, 3/15/2007, 4/1/2007 Recurring Reservation – Combine Recurring Reservations Checked Start: 12:00 PM Meeting Time: 12:00 PM Meeting End Time: 2:30 PM End: 2:30 PM	3/1/2007		Pending Payment																		
<input type="checkbox"/> Delete Archive Recurring View Recurring Edit Recurring Copy Recurring Organization: Girl Scouts Meeting Room: Community Room B Date: 3/1/2007 Recurring Reservation – Combine Recurring Reservation Deselected Start: 12:00 PM Meeting Time: 12:00 PM Meeting End Time: 2:30 PM End: 2:30 PM	3/1/2007	Pending Review																			
Delete																					

¹ The Add Holiday/Room Closing button only appears when Room Reserve is a standalone application.
² The Holiday/Closings category becomes All Reservations when Events is installed and enabled.

Holiday/Closings

The Holiday/Closings tab is only available at the Administrator Level. The Add Holiday/Room Closing button and the Holiday/Closing tab appear when Room Reserve is a standalone application. This results in the elimination of the Add Holiday/Room Closing button and the replacement of the Holiday/Closing tab with the All Reservations tab.

Room Request/Reservation Maintenance						Text Size																																										
						T	T	T																																								
Home	Reservation Maintenance	Reports	Setup	System Settings	About	Logoff: [Level]																																										
Add Holiday/Room Closing Bulk Archive																																																
Pending Requests (##)		Pending Payments (##)		Accepted Reservations (##)		Archived Reservations		Holiday/Closings																																								
Search/Filter Room: <input type="text" value="Rooms"/>			Holiday/Closings																																													
Organization: <input type="text"/>			Sort Results By: <input type="text" value="Reservation Information"/> Descending Order Ascending Order																																													
Keyword: <input type="text"/>																																																
Reservation Date: <input checked="" type="radio"/> All <input type="radio"/> Today <input type="radio"/> This Week <input type="radio"/> This Month <input type="radio"/> Range: <input type="text"/> [Date Entry field] <input type="button" value="Pick"/>																																																
TO <input type="text"/> [Date Entry field] <input type="button" value="Pick"/>																																																
<input checked="" type="checkbox"/> Combine recurring reservations <input type="button" value="Search"/>																																																
List Mode: No <input type="button" value="Scroll"/>																																																
<input type="button" value="Back to Maintenance Page"/>																																																
			<table border="1"> <thead> <tr> <th colspan="7"></th> <th>Requested On</th> </tr> </thead> <tbody> <tr> <td colspan="7"> Edit Single Delete Organization: Thanksgiving Date: Friday, November 23, 2007 Start: 12:00 AM End: 11:00 PM </td> <td></td> </tr> <tr> <td colspan="7"> Edit Single Delete Organization: Thanksgiving Date: Saturday, November 24, 2007 Start: 12:00 AM End: 11:00 PM </td> <td></td> </tr> <tr> <td colspan="7"> Edit Single Delete Organization: Christmas Date: Monday, December 24, 2007 Start: 12:00 AM End: 11:00 PM </td> <td></td> </tr> <tr> <td colspan="7"> Edit Single Delete Organization: Christmas Date: Tuesday, December 25, 2007 Organization: Girl Scouts Meeting Start: 12:00 AM End: 11:00 PM </td> <td></td> </tr> </tbody> </table>													Requested On	Edit Single Delete Organization: Thanksgiving Date: Friday, November 23, 2007 Start: 12:00 AM End: 11:00 PM								Edit Single Delete Organization: Thanksgiving Date: Saturday, November 24, 2007 Start: 12:00 AM End: 11:00 PM								Edit Single Delete Organization: Christmas Date: Monday, December 24, 2007 Start: 12:00 AM End: 11:00 PM								Edit Single Delete Organization: Christmas Date: Tuesday, December 25, 2007 Organization: Girl Scouts Meeting Start: 12:00 AM End: 11:00 PM							
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B. Search/Filter

The Search/Filter helps locate records within the reservations database. The Search/Filter compares the search criteria against the Reservation Form and displays only those records that match the criteria. The options on the filter and the search based on the filter apply only to the category of reservations displayed. The Search/Filter retains search criteria allowing users to apply criteria to multiple reservation categories. The illustration below represents a composite of the options that appear on the Search/Filter.

Search/Filter
Room: <input type="text" value="Rooms"/>
Organization: <input type="text"/>
Internal <input type="text" value="Classification List"/>
Keyword: <input type="text"/>
Reservation Date: <input checked="" type="radio"/> All <input type="radio"/> Today <input type="radio"/> This Week <input type="radio"/> This Month <input type="radio"/> Range: <input type="text"/> <input type="button" value="Pick"/>
TO <input type="text"/> <input type="button" value="Pick"/>
<input checked="" type="checkbox"/> Combine recurring reservations <input type="button" value="Search"/>
List Mode: No Scroll <input type="button" value="Scroll"/>
Delete History Information: Select Ending Date: <input type="text"/> <input type="button" value="Pick"/> <input type="button" value="Delete Reservations"/>
<input type="button" value="Back to Maintenance Page"/>

The following section provides information about the fields available on the Search/Filter.

1. The *Room* field contains a list of all rooms and locations available for meetings. *Room* narrows a search to only the selected room and reduces the number of results displayed.
2. *Organization* is an optional field that refers to the company, agency or organization sponsoring the meeting.
3. *Internal* is an optional field that refers to the Internal Classification assigned by the library. These fields are visible only to library staff and appear only in the Accepted Reservations and Archived Reservations categories.
4. *Keyword* is an optional field that searches the data fields on the Reservation Form. The field accepts partial words and phrases.
5. *Reservation Date* is the date the meeting will take place.
 - A. *All* searches all meeting dates and displays only those records that match all search criteria. *All* is the default Reservation Date.
 - B. *Today* searches for reservations scheduled to occur on the current date. If there are no additional search criteria, the system displays all reservations scheduled for the current date.
 - C. *This Week* searches for reservations scheduled to occur during the current week – defined as beginning on Sunday of the current week and ending Saturday of the current week. The

system does not search a rolling week. If there are no additional criteria, the system displays the records of all reservations scheduled to occur during the current week.

- D. *This Month* searches for reservations scheduled to occur during the current month – defined as the calendar beginning on the 1st and ending the last day of the month. The system does not search a rolling month. If there are no additional criteria, the system displays all reservations scheduled for the current month.
 - E. *Range* allows users to narrow their search to a specified date range. Users may enter dates manually or select a date using the Date Pick button. These fields require a beginning and end date.
6. *Combine Recurring Reservations* determines how the system displays recurring reservations. By default, this field is checked () and the system displays recurring reservations as one reservation with multiple dates, as illustrated below.

The Reservation Form associated with combined recurring reservations contains all reservation dates. Revisions made in Edit Mode affect all dates in the series.

<u>Archive</u>	<u>Archive Recurring</u>	<u>View Recurring</u>	<u>Edit Recurring</u>	<u>Copy Recurring</u>
Organization: Girl Scouts Meeting Room: Community Room B Date: 3/1/2007, 3/15/2007, 4/1/2007 Start: 12:00 PM Meeting Time: 12:00 PM Meeting End Time: 2:30 PM End: 2:30 PM		Select Combine Recurring Reservations		

When deselected, the system displays recurring reservations as multiple single records – one date per record, as illustrated below. The record includes two (2) sets of functions:

- Recurring functions are associated with a Reservation Form containing all recurring dates, and
- Single functions are associated with a Reservation Form that allows revisions to individual dates only, though the form will display all dates in the series.

<u>Archive View</u>	<u>Archive Recurring Edit Single</u>	<u>View Recurring Copy Single</u>	<u>Edit Recurring Delete</u>	<u>Copy Recurring Confirmation</u>
Organization: Girl Scouts Meeting Room: Community Room B Date: 3/1/2007 Start: 12:00 PM Meeting Time: 12:00 PM Meeting End Time: 2:30 PM End: 2:30 PM		Deselect Combine Recurring Reservation		

7. *List mode* determines how the system displays records.
- Scroll* creates a secondary window within the internet window that displays approximately two (2) reservations at a time. The remainder of the screen remains frozen so that the Search/Filter and page header (everything above the record table) remain visible. *Scroll* results in two side-by-side scroll bars: the inner scroll bar applies to the reservations list; the outer scroll bar applies to the internet window.
- No scroll* displays records in one long list. The internet scroll bar controls the entire page. The Search/Filter and the page header will scroll in and out of view as you scroll through the reservation record.
8. *Delete History Information* appears on the Archive Search/Filter only. It allows you to delete records from the Archive in bulk by specifying an end date. The system deletes all records prior

to and including the selected end date. Delete functions permanently remove records and all associated statistical information from the database.

Caution: Deleted records are not recoverable.

- Back to Maintenance Page: BACK TO MAINTENANCE PAGE returns the user to the system Home Page.

C. Reservation Records

Each category within the Request/Reservations database contains a list of reservation records. Each record provides basic information about a reservation: the date, times, place, and the name of the sponsoring organization. The illustration below provides an example of a list of reservation records (highlighting added for emphasis).

Sort Filter	Sort Results By: Reservation Information Descending Order Ascending Order									
	<input type="button" value="Archive"/>									
	Description									
Links to Reservation and Confirmation Forms. See the table below for an explanation of each link.	<table border="1" style="width:100%"> <tr> <td>Archive</td> <td>View</td> <td>Edit Single</td> <td>Copy Single</td> <td>Delete</td> <td>Confirmation</td> </tr> </table>	Archive	View	Edit Single	Copy Single	Delete	Confirmation			
Archive	View	Edit Single	Copy Single	Delete	Confirmation					
	<table border="1" style="width:100%"> <tr> <td> Organization: Board Meeting Room: Board Room Date: Monday, March 12, 2007 Start: 12:00 PM Meeting Time: 12:00 PM Meeting End Time: 1:00 PM End: 1:00 PM </td> <td style="text-align:right">Single Date Reservation</td> </tr> <tr> <td> <table border="1" style="width:100%"> <tr> <td>Archive</td> <td>Archive Recurring</td> <td>View Recurring</td> <td>Edit Recurring</td> <td>Copy Recurring</td> </tr> </table> </td> <td></td> </tr> </table>	Organization: Board Meeting Room: Board Room Date: Monday, March 12, 2007 Start: 12:00 PM Meeting Time: 12:00 PM Meeting End Time: 1:00 PM End: 1:00 PM	Single Date Reservation	<table border="1" style="width:100%"> <tr> <td>Archive</td> <td>Archive Recurring</td> <td>View Recurring</td> <td>Edit Recurring</td> <td>Copy Recurring</td> </tr> </table>	Archive	Archive Recurring	View Recurring	Edit Recurring	Copy Recurring	
Organization: Board Meeting Room: Board Room Date: Monday, March 12, 2007 Start: 12:00 PM Meeting Time: 12:00 PM Meeting End Time: 1:00 PM End: 1:00 PM	Single Date Reservation									
<table border="1" style="width:100%"> <tr> <td>Archive</td> <td>Archive Recurring</td> <td>View Recurring</td> <td>Edit Recurring</td> <td>Copy Recurring</td> </tr> </table>	Archive	Archive Recurring	View Recurring	Edit Recurring	Copy Recurring					
Archive	Archive Recurring	View Recurring	Edit Recurring	Copy Recurring						
Basic reservation information. The Reservation Form contains additional information.	<table border="1" style="width:100%"> <tr> <td> Organization: Girl Scouts Meeting Room: Community Room B Date: 3/1/2007, 3/15/2007, 4/1/2007 Start: 12:00 PM Meeting Time: 12:00 PM Meeting End Time: 2:30 PM End: 2:30 PM </td> <td style="text-align:right">Recurring Reservation – Recurring Reservations Combined</td> </tr> <tr> <td> <table border="1" style="width:100%"> <tr> <td>Archive View</td> <td>Archive Recurring Edit Single</td> <td>View Recurring Copy Single</td> <td>Edit Recurring Delete</td> <td>Copy Recurring Confirmation</td> </tr> </table> </td> <td></td> </tr> </table>	Organization: Girl Scouts Meeting Room: Community Room B Date: 3/1/2007, 3/15/2007, 4/1/2007 Start: 12:00 PM Meeting Time: 12:00 PM Meeting End Time: 2:30 PM End: 2:30 PM	Recurring Reservation – Recurring Reservations Combined	<table border="1" style="width:100%"> <tr> <td>Archive View</td> <td>Archive Recurring Edit Single</td> <td>View Recurring Copy Single</td> <td>Edit Recurring Delete</td> <td>Copy Recurring Confirmation</td> </tr> </table>	Archive View	Archive Recurring Edit Single	View Recurring Copy Single	Edit Recurring Delete	Copy Recurring Confirmation	
Organization: Girl Scouts Meeting Room: Community Room B Date: 3/1/2007, 3/15/2007, 4/1/2007 Start: 12:00 PM Meeting Time: 12:00 PM Meeting End Time: 2:30 PM End: 2:30 PM	Recurring Reservation – Recurring Reservations Combined									
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	<table border="1" style="width:100%"> <tr> <td> Organization: Girl Scouts Meeting Room: Community Room B Date: 3/1/2007 Start: 12:00 PM Meeting Time: 12:00 PM Meeting End Time: 2:30 PM End: 2:30 PM </td> <td style="text-align:right">Recurring Reservation – Uncombined Recurring</td> </tr> </table>	Organization: Girl Scouts Meeting Room: Community Room B Date: 3/1/2007 Start: 12:00 PM Meeting Time: 12:00 PM Meeting End Time: 2:30 PM End: 2:30 PM	Recurring Reservation – Uncombined Recurring							
Organization: Girl Scouts Meeting Room: Community Room B Date: 3/1/2007 Start: 12:00 PM Meeting Time: 12:00 PM Meeting End Time: 2:30 PM End: 2:30 PM	Recurring Reservation – Uncombined Recurring									

Each record also contains links to the Reservation Form and Confirmation that allow you to perform the functions described in the table below.

Link(s)	Description
Archive and Archive Recurring	Archive moves reservation records from their current category to the Archive. To archive multiple records, use the Bulk Archive button located beneath the category tabs. The Reports function retains access to archived records for statistical purposes.

Link(s)	Description
View and View Recurring	View opens a read-only version of the Reservation Form. Only the internal administrative and audit fields may be updated.
Edit Single and Edit Recurring	Edit opens a read-write version of the Reservation Form (“Edit Mode”). Revisions made in Edit Mode overwrite the original Reservation Form.
Copy Single and Copy Recurring	Copy duplicates the Reservation Form as a template for a new reservation and retains the original.
Delete	Delete removes a record and all associated statistics from the system <u>permanently</u> . The Reports function <u>does not</u> have access to statistical information from deleted records. ⚠ Warning: Deleted records are unrecoverable.
Confirmation	Confirmation opens a copy of the Reservation Confirmation.

D. The Reservation Form

Each reservation record contains a link to an enhanced version of the original Reservation Form that includes additional administrative fields, functions and cross-functional links that allow you to:

- Access different versions of the Reservation Form for the purposes of viewing, editing or copying the reservation, or
- Access a list of all reservations associated with an organization.

The additional administrative fields include:

- An *Internal Classification* field that contains a list of preset statements the library can use to evaluate its experience with a patron or organization. The statements that appear are configured by the Administrator. Internal Classification fields are only visible to library staff.
- An *Internal Notes* text field that allows you to enter any comments or information pertinent to the reservation, and
- *Auditing* fields that track who acted upon, reviewed or updated a Reservation Form and when. This field must be enabled by the Administrator during configuration.

The table and information that follows describes the functions and cross-links available on each version of the Reservation Form.

Link/ Mode	View	Preserves Original Reservation Form?	Functions								Cross-Links						
			Accept ¹	Deny ²	Update Classification ³	Update Attendance ⁴	Update ⁵	Submit ⁶	Verify Requests ⁷	Archive ⁸	Edit ⁹	View ¹⁰	Back ¹¹	Change Request ¹²	View Other Requests ¹³	View Room Set Up Options ¹⁴	View Confirmation ¹⁵
View	Pending Request	Y	✓	✓							✓		✓		✓		✓

Link/ Mode	View	Preserves Original Reservation Form?	Functions								Cross-Links					
			Accept ¹	Deny ²	Update Classification ³	Update Attendance ⁴	Update ⁵	Submit ⁶	Verify Requests ⁷	Archive ⁸	Edit ⁹	View ¹⁰	Back ¹¹	Change Request ¹²	View Other Requests ¹³	View Room Set Up Options ¹⁴
View	Pending Payment	Y						✓		✓		✓		✓		✓
View	Accepted Reservation	Y			✓	✓			✓	✓		✓		✓		
View	Archive	Y			✓	✓			✓	✓		✓		✓		
Edit	Pending Request	N						✓			✓	✓	✓		✓	
Edit	Pending Payment	N						✓			✓	✓	✓		✓	
Edit	Accepted Reservation	N						✓			✓	✓	✓		✓	
Edit	Archive	N						✓			✓	✓	✓		✓	
Copy	Pending Request	Y						✓			✓	✓	✓		✓	
Copy	Pending Payment	Y						✓			✓	✓	✓		✓	
Copy	Accepted Reservation	Y						✓			✓	✓	✓		✓	
Copy	Archive	Y						✓			✓	✓	✓		✓	

¹ACCEPT confirms a pending reservation and moves the reservation to Accepted Reservations.

²DENY:

- Removes a pending reservation from the calendar,
- Sends a status change e-mail to the reservation contact, and
- Changes the Requested On date from the reservation's submission date to its denied date.

The system retains Denied reservations in Pending Requests when the reservation contains no e-mail address and highlights them in bold-italic print.

To move a denied request to the Archive, open the Reservation Form and reselect DENY. Moving a reservation to the Archive removes the bold-italic highlighting.

³UPDATE CLASSIFICATION saves entries and revisions to the Internal Classification and Internal Notes fields.

⁴UPDATE ATTENDANCE saves entries and revisions to the Attendance Count field.

⁵UPDATE saves any entries and revisions to the Internal Classification, Internal Notes and Attendance Count fields.

⁶SUBMIT saves receipt of payment, Internal Classification and Internal Notes entries, and moves a reservation from Pending Payments to Accepted Reservations.

⁷VERIFY REQUESTS saves and verifies changes to the original Reservation Form.

⁸ARCHIVE moves a reservation from an active category - Pending Requests, Pending Payments, or Accepted Reservations - to the Archive.

⁹EDIT toggles between the View and Edit modes.

▼ **Warning:** Edit mode overwrites the original Reservation Form. If overwritten, original information is unrecoverable.

¹⁰VIEW toggles between the Edit or Copy modes and View mode. While View is read-only version of the Reservation Form, the Internal Classification and Audit fields are editable fields.

¹¹BACK returns to the Requests/Reservations page.

¹²CHANGE REQUEST provides access to the In-House Reservation (date, time and room selection) pages.

¹³VIEW OTHER REQUESTS/RESERVATIONS generates a list of additional reservations listed under the contact name. The resulting list is read-only and contains no other links.

¹⁴VIEW ROOM SET-UP OPTIONS displays the available room configurations as designed by the library. In this instance, room configuration refers to the arrangement of tables and chairs in the room.

¹⁵VIEW CONFIRMATION displays the original reservation confirmation.

The table below compares the fields that appear on the various versions of the Reservation Form. Because the Reservation Form is a highly configured form created by the Administrator, the fields and field names listed below may differ from your Reservation Form.

Fields	Original Request Form	View Mode	Edit Mode	Copy Mode
Room Name	✓	✓	✓	✓
Date(s)	✓	✓	✓	✓
NOTE	✓	-----	✓	✓
Meeting Times	✓	✓	✓	✓
Number of Attendees	✓	✓	✓	✓
Organization	✓	✓	✓	✓
Purpose	✓	✓	✓	✓
Contact Person's Name	✓	✓	✓	✓
Primary Phone	✓	✓	✓	✓
Alternate Phone	✓	✓	✓	✓
Address 1	✓	✓	✓	✓
Address 2	✓	✓	✓	✓
City	✓	✓	✓	✓
State	✓	✓	✓	✓
Zip Code	✓	✓	✓	✓
Fax	✓	✓	✓	✓
Email	✓	✓	✓	✓
Notes	✓	✓	✓	✓
Custom 1	✓	✓	✓	✓
Custom 2	✓	✓	✓	✓
Custom 3	✓	✓	✓	✓
Cost Classification	✓	✓	✓	✓

Fields	Original Request Form	View Mode	Edit Mode	Copy Mode
Organization Non-Profit	✓	✓	✓	✓
Room Setup	✓	-----	✓	✓
Category Type	✓	✓	✓	✓
Internal Classification	-----	✓	-----	-----
Internal Notes	-----	✓	-----	-----
Name/Initials ¹	-----	✓	✓	✓
Audit Name(s) ¹	-----	✓	✓	✓
Audit Time Stamp(s) ¹	-----	✓	✓	✓
Last Modified ¹	-----	✓	✓	✓

Audit fields are required fields. The system automatically completes the audit fields if the user's name and login ID are stored on the computer. Otherwise, the user must enter their name or initials when making changes to a Reservation Form. The system automatically time stamps revisions. Audit fields must be enabled by the Administrator during configuration.

E. The Reservation Confirmation


The system generates a Confirmation (illustrated below) for accepted reservations. The system e-mails a copy of the Confirmation to the Reservation Contact and attaches a copy to the reservation record. The Confirmation is accessible by clicking the CONFIRMATION link associated with the reservation record. See Section 2.C - System Messages (page 5) for more information about creating the template used to generate the Confirmation.

The request is complete for
 Contact: Jane Doe
 Room: Room 1
 Date(s): January 10, 2007
 Time: 9:00 AM to 10:00 AM
 Confirmation Number: QVKSNKI
 You will be notified if there is a problem with your request.

F. Working with Existing Reservations

The information in the following section refers to room reservations, but applies equally to equipment reservations. All the instructions in this section begin from the Home Page. As you become familiar with the system, you will find you can navigate to reservation functions by using the tool bar to bypass the Home Page.

How To Do It - Finding a Reservation

 **Note:** The Search/Filter applies only to the selected category. It does not search the entire reservation database.

1. Beginning at the Home Page, click on REQUESTS/RESERVATIONS (Reservation Maintenance menu).

Reservation Maintenance
Rooms: <ul style="list-style-type: none"> • Requests/Reservations • In-House Reservations <ul style="list-style-type: none"> (or) ➢ Mediated Reservations ➢ Unmediated Reservations
Equipment: <ul style="list-style-type: none"> • Requests/Reservations • In-House Reservations
Patron Reservation Lookup

The system displays the Room Request/Reservation Maintenance page. The default category is Pending Requests.

2. Click on the desired reservation status tab – Pending Requests, Pending Payments, Accepted Reservations, Archived Reservations or Holidays/Closings*.
3. Enter or select the desired search criteria into the Search/Filter.

Note: The data entered into the Search/Filter must match a Reservation Record exactly for the system to display positive results. Any misspellings or run-ons will result in a negative result.

Search/Filter
Room: Rooms <input type="button" value="v"/> Organization: [Text entry field]
Internal Classification List <input type="button" value="v"/>
Keyword: [Text entry field]
Reservation Date: <input type="radio"/> All <input type="radio"/> Today <input type="radio"/> This Week <input type="radio"/> This Month <input type="radio"/> Range: [Date Entry field] <input type="button" value="Pick"/>
TO [Date Entry field] <input type="button" value="Pick"/>
<input checked="" type="checkbox"/> Combine recurring reservations <input type="button" value="Search"/>
List Mode: No Scroll <input type="button" value="Scroll"/>
Delete History Information: Select Ending Date: [Date Entry Field] <input type="button" value="Pick"/> <input type="button" value="Delete Reservations"/>
<input type="button" value="Back to Maintenance Page"/>

4. Click SEARCH to run the search. Results will display in the table to the right of the Search/Filter.

* The Holidays/Closings is replaced by All Reservations when Events is installed and enabled.

How To Do It - Changing the Order in Which Reservations Are Displayed

Room Request/Reservation Maintenance						Text Size		
						τ	T	T
Home	Reservation Maintenance	Reports	Setup	System Settings	About	Logoff: [Level]		
<input type="button" value="Add Holiday/Room Closing"/> <input type="button" value="Bulk Archive"/>								
Pending Requests (##)		Pending Payments (##)		Accepted Reservations (##)		Archived Reservations		Holiday/Closings
Search/Filter			ACCEPTED ROOM RESERVATIONS					
Room: <input type="button" value="Rooms"/>			Sort Results By: <input type="button" value="Reservation Information"/>					
Organization: [Text entry field]			Descending Order Ascending Order					
Internal <input type="button" value="Classification List"/>			<input type="button" value="Archive"/>					
				Description		Requested On		INTERNAL

1. Locate the Sort Results By field above the list of reservations.
2. Select a field from the drop list by which to sort the list. The system resorts the reservation list. Note: The system displays records in ascending order, unless otherwise selected.
3. Click the option – Descending or Ascending – to resort the database.

Descending	Ascending
The bolded term on the left is the alternate resort option.	The grayed-out term on the right is the current list sort.

Descending | Ascending: The list is sorted in ascending order.
Ascending | Descending: The list is sorted in descending order.

The list will resort in ascending or descending order as selected.

How To Do It - Viewing a Reservation


Reminder: View displays a read-only version of the Reservation Form. The following are the only functions available:

- Updating internal administrative fields (i.e., Internal Classification, Internal Notes, and Attendance),
 - Accepting or denying Pending Reservations, and
 - Posting payments for Pending Payments reservations.
1. Beginning at the Home Page, click on REQUESTS/RESERVATIONS (Reservation Maintenance menu).

Reservation Maintenance Rooms: <ul style="list-style-type: none"> • Requests/Reservations • In-House Reservations (or) <ul style="list-style-type: none"> ➢ Mediated Reservations ➢ Unmediated Reservations Equipment: <ul style="list-style-type: none"> • Requests/Reservations • In-House Reservations Patron Reservation Lookup
--

The system displays the Room Request/Reservation Maintenance page. The default category is Pending Requests.

2. Click on the desired reservation status tab – Pending Requests, Pending Payments, Accepted Reservations Archived Reservations or Holidays/Closings.
3. Locate the desired reservation. See Search/Filter for further assistance.
4. Click on VIEW. The system displays the Reservation Form in View Mode.

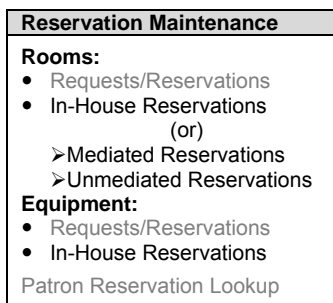
 **Note:** The VIEW link may appear as View, View Single or View Recurring depending on the type of reservation.

5. Select one of the following options to exit View Mode:
 - A. Click EDIT to open the reservation in Edit Mode;
 - B. Click ARCHIVE to move the reservation to the Archive
 - C. Click BACK to return to the Room Request/Reservations Maintenance page, or
 - D. Click the desired function on the Menu Bar at the top of the page.

How To Do It - Editing a Reservation


The Edit function permanently overwrites the original reservation, which is unrecoverable. Use the COPY function to create a new reservation using an existing reservation as a template.

1. Beginning at the Home Page, click on REQUESTS/RESERVATIONS (Reservation Maintenance menu).




The system displays the Room Request/Reservation Maintenance page. The default category is Pending Requests.

2. Click on the desired reservation status – Pending Reservations, Pending Payments, Accepted Reservations or Holiday/Closings*.
3. Locate the desired reservation. See Search/Filter for further assistance.
4. Click EDIT. The system displays the Reservation Form in Edit Mode.

 **Note:** EDIT may appear as Edit, Edit Single or Edit Recurring depending on the type of reservation.

5. Edit the reservation as desired.
6. Click VERIFY REQUEST at the end of the form.

 **Note:** The system displays an error message when required information is missing.

- (a) Click OK to clear the error.

* The Holidays/Closings is replaced by All Reservations when Events is installed and enabled.

- (b) Review the Reservation Form and complete or update required information.
- (c) Click VERIFY REQUEST.

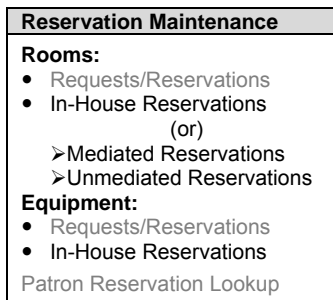
The system displays a Room Request Summary page.

7. Review the Reservation Form to ensure the accuracy of all information. If accurate, go to Step 8 or See A, below, to return to Edit mode.
 - A. To make revisions:
 - (i) Click your browser's BACK button. The system returns to the Reservation Form in Edit Mode.
 - (ii) Make revisions as needed.
 - (iii) Click VERIFY REQUEST to return to the Room Request Summary page.
8. Click SUBMIT REQUEST. The system saves changes and returns to the Room Request/Reservation Maintenance page.

How To Do It - Copying a Reservation


Copying allows you to use an existing reservation as a template for a new reservation without compromising the original reservation.

1. Beginning at the Home Page, click on REQUESTS/RESERVATIONS (Reservation Maintenance menu).




The system displays the Room Request/Reservation Maintenance page. The default category is Pending Requests.

2. Click on the desired reservation status – Pending Reservations, Pending Payments, Accepted Reservations or Holiday/Closings*.
3. Locate the desired reservation. See Search/Filter for further assistance.
4. Click COPY. The system displays the Reservation Form in Copy Mode.

 **Note:** COPY may appear as Copy, Copy Single or Copy Recurring depending on the type of reservation.
5. Click CHANGE RESERVATION (located next to the Room field) to change the date, time and location of the event. The system displays the calendar.
6. Select a new room, date and time, as desired. See Section 1.C - Making a Reservation (page 18).
7. Click SUBMIT CHANGE. The system verifies the availability of the selected room, date and time, saves the change, and returns to the Reservation Form.
8. Edit the remainder of the reservation as desired.

* The Holidays/Closings is replaced by All Reservations when Events is installed and enabled.

9. Click VERIFY REQUEST at the end of the form.

 **Note:** The system displays an error message when required information is missing.

- (a) Click OK to clear the error.
- (b) Review the Reservation Form and complete or update required information.
- (c) Click VERIFY REQUEST.

The system displays a Room Request Summary page.

10. Review the Reservation Form to ensure the accuracy of all information. If accurate, go to Step 11, or See Step A, below to return to the Reservation Form in Edit mode.

A. To make revisions:

- (i) Click your browser's BACK button. The system returns to the Reservation Form in Edit Mode.
- (ii) Make revisions as needed.
- (iii) Click VERIFY REQUEST to return to the Room Request Summary page.

11. Click SUBMIT REQUEST. The system saves changes and displays Reservation Confirmation illustrated below.

The request is complete for:
Contact:
Room:
Date(s):
Time:

The confirmation number is

Please note the status of the request is:

12. Select one of the options below to continue working with the system:

A. Home Page: Click BACK TO MAINTENANCE PAGE.

The system closes the Reservation Confirmation and returns to the Home Page.

B. New Request: Click NEW REQUEST to access a blank Reservation Form.

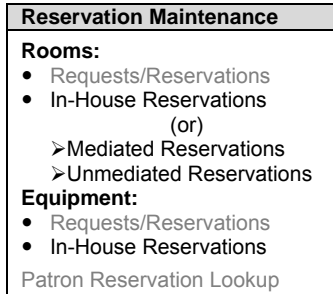
The system closes the Reservation Confirmation and returns to the Room Request: Date, Time and Room Selection Page. Continue with the reservation process. See Section 1.C - Making a Reservation (page 18).

C. Another Request: Click ANOTHER REQUEST to copy and use the previous reservation as a template for new reservation.


The system closes the Reservation Confirmation and returns to the Room Request: Date, Time and Room Selection Page. Continue with Copying a Reservation above.

How To Do It - Accepting a Reservation

1. Beginning at the Home Page, click on REQUESTS/RESERVATIONS (Reservation Maintenance menu).

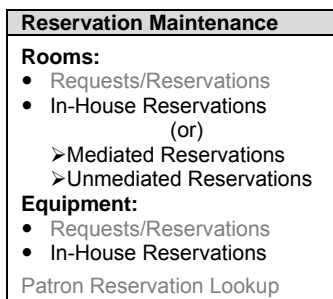


The system displays the Room Request/Reservation Maintenance page. The default category is Pending Requests. If you are navigating from elsewhere in the system, make sure Pending Requests is the active category.

2. Locate the desired reservation. See Search/Filter for further assistance.
3. Click on VIEW. The system displays the Reservation Form in View Mode.
 -  **Note:** VIEW may appear as View, View Single or View Recurring depending on the type of reservation.
4. Update internal administrative fields - Internal Classification, Internal Notes, and Attendance - as desired.
5. Click ACCEPT at the end of the Reservation Form. The system automatically:
 - Sends an e-mail confirmation to the Reservation Contact,
 - Displays confirmation that a status change e-mail was sent,
 - Moves the reservation to Accepted Reservations without secondary confirmation, and
 - Returns to the Room Request/Reservations Maintenance page.

How To Do It - Denying a Pending Reservation

1. Beginning at the Home Page, click on REQUESTS/RESERVATIONS (Reservation Maintenance menu).



The system displays the Room Request/Reservation Maintenance page. The default category is Pending Requests. If you are navigating from elsewhere in the system, make sure Pending Requests is the active category.

2. Locate the desired reservation. See Search/Filter for further assistance.
3. Click on VIEW. The system displays the Reservation Form in View Mode.

Note: VIEW may appear as View, View Single or View Recurring depending on the type of reservation.

4. Update any internal administrative fields - Internal Classification, Internal Notes, and Attendance - as desired.
5. Click DENY at the end of the Reservation Form. The system automatically sends a status change e-mail to the reservation contact, if an e-mail address is on record, and displays the following message:

You have denied the request.
 By clicking YES, the request will be permanently removed from the list and signifies that the contact has been notified.
 By clicking NO, the request will remain on the list until the contact can be notified.

Contact Information:
 Organization Name:
 Contact Name:
 Phone Number:
 Fax Number:
 E-mail Address:

Do you want to remove the request?

6. Select one of the following:
 - A. Click YES to move the request to the Archive; or
 - B. Click NO to retain the denied request in Pending Requests. Retain the reservation in Pending Requests if the reservation contact did not provide an e-mail address or the reservation requires other additional follow-up. Denied requests appear in Pending Requests in bold-italic print and the Requested On date changes to reflect the date the reservation was denied.

The system returns to the Room Request/Reservation Maintenance page.

How To Do It - Closing a Denied Request

The following instructions describe how to close a denied reservation retained in Pending Requests.

1. Beginning at the Home Page, click on REQUESTS/RESERVATIONS (Reservation Maintenance menu).

Reservation Maintenance

Rooms:

- Requests/Reservations
- In-House Reservations

(or)

- Mediated Reservations
- Unmediated Reservations

Equipment:

- Requests/Reservations
- In-House Reservations

Patron Reservation Lookup

The system displays the Room Request/Reservation Maintenance page. The default category is Pending Requests. If you are navigating from elsewhere in the system, make sure Pending Requests is the active category.

2. Locate the desired reservation. Denied reservations appear in bold-italic print.
3. Click on VIEW. The system displays the Reservation Form in View Mode.

Note: VIEW may appear as View, View Single or View Recurring depending on the type of reservation.

4. Update any internal administrative fields - Internal Classification, Internal Notes, and Attendance - as desired.
5. Click DENY at the end of the Reservation Form. The system automatically sends a status change e-mail to the reservation contact, if an e-mail address is on record, and displays the following message:

You have denied the request.
 By clicking YES, the request will be permanently removed from the list and signifies that the contact has been notified.
 By clicking NO, the request will remain on the list until the contact can be notified.

Contact Information:
 Organization Name
 Contact Name
 Phone Number
 Fax Number
 E-mail Address

Do you want to remove the request?

6. Click YES to move the request to the Archive. The system returns to the Room Request/Reservation Maintenance page.

How To Do It - Pending Payments: Entering Receipt of Payment

The following instructions describe how to enter receipt of payments and deposits.

▼ Payment information cannot be modified once entered and saved.

1. Beginning at the Home Page, click on REQUESTS/RESERVATIONS (Reservation Maintenance menu).

Reservation Maintenance

Rooms:

- Requests/Reservations
- In-House Reservations
- (or)
- Mediated Reservations
- Unmediated Reservations


Equipment:

- Requests/Reservations
- In-House Reservations

Patron Reservation Lookup

The system displays the Room Request/Reservation Maintenance page. The default category is Pending Requests.

2. Click the PENDING PAYMENTS tab.
3. Locate the desired reservation. See Search/Filter for further assistance.
4. Click on VIEW. The system displays the Reservation Form in View Mode.

 **Note:** VIEW may appear as View, View Single or View Recurring depending on the type of reservation.

5. Locate the Payment Received field following the Contact Information section.
6. Enter payment information into the Payment Received field. Double check the information entered to ensure accuracy.

▼ Warning: Payment information cannot be modified once entered and saved.

7. Update any internal administrative fields - Internal Classification, Internal Notes, and Attendance - as desired.

8. Click SUBMIT to save. The system automatically:
 - Sends an e-mail confirmation to the Reservation Contact, if an e-mail address was provided,
 - Moves the reservation to Accepted Reservations, and
 - Returns to the Room Request/Reservation Maintenance page.

Section 3. Holidays and Other Closings

A. Room Reserve Without Events

When Room Reserve is a standalone application (without Events), Holidays and Closings are managed through Requests/Reservations (Reservation Maintenance menu).

How To Do It - Adding a Holiday/Closing

1. Beginning at the Home Page, click on REQUESTS/RESERVATIONS (Reservation Maintenance menu).

Reservation Maintenance
Rooms: <ul style="list-style-type: none"> • Requests/Reservations • In-House Reservations <ul style="list-style-type: none"> (or) ➢ Mediated Reservations ➢ Unmediated Reservations
Equipment: <ul style="list-style-type: none"> • Requests/Reservations • In-House Reservations
Patron Reservation Lookup

The system displays the Room Request/Reservation Maintenance page.

2. Click ADD HOLIDAY/ROOM CLOSING. See the illustration below.

Room Request/Reservation Maintenance					Text Size														
					<table border="1" style="display: inline-table; border-collapse: collapse;"> <tr> <td style="padding: 2px 5px;">T</td> <td style="padding: 2px 5px;">T</td> <td style="padding: 2px 5px;">T</td> </tr> </table>			T	T	T									
T	T	T																	
Home Reservation Maintenance Reports Setup System Settings About Logoff: [Level]																			
<table border="1" style="margin: auto; border-collapse: collapse;"> <tr> <td colspan="4" style="background-color: #cccccc; padding: 5px;">Add Holiday/Room Closing</td> <td colspan="2" style="background-color: #cccccc; padding: 5px;">Bulk Archive</td> </tr> <tr> <td style="padding: 5px;">Pending Requests (##)</td> <td style="padding: 5px;">Pending Payments (##)</td> <td style="padding: 5px;">Accepted Reservations (##)</td> <td style="padding: 5px;">Archived Reservations</td> <td colspan="2" style="padding: 5px;">Holiday/Closings</td> </tr> </table>								Add Holiday/Room Closing				Bulk Archive		Pending Requests (##)	Pending Payments (##)	Accepted Reservations (##)	Archived Reservations	Holiday/Closings	
Add Holiday/Room Closing				Bulk Archive															
Pending Requests (##)	Pending Payments (##)	Accepted Reservations (##)	Archived Reservations	Holiday/Closings															
Search/Filter			PENDING ROOM REQUESTS																

The system displays the Holiday and Other Room Closings Form (illustrated below).

*Holiday/Closing Title:	[Text Entry Field]
*Closing Date(s):	[Date Entry Field] Pick TO [Date Entry Field] Pick
[Use only the first date selection when closing rooms for a single day.]	
*Start Time Each Day:	Time List v *
*End Time Each Day:	Time List v *
<input checked="" type="checkbox"/> All Rooms	
*Rooms:	<input type="checkbox"/> Room 1 <input type="checkbox"/> Room 2 <input type="checkbox"/> Room 3
Save Back	

*Start Time Each Day and End Time Each Day contain time drop lists that run from 6:00 AM to 11:00 PM and "Closed". Closed makes the room(s) unavailable for the entire day.


3. Complete the Holiday/Closing Form as desired.
4. Finalizing the form:
 - A. Click SAVE to enter the closing on the calendar; **or**
 - B. Click BACK to cancel and return to the Room Request/Reservation Maintenance page.

B. Room Reserve With Events

Events controls Holiday/Room Closings when Room Reserve works with Events. Consequently, the Add Holiday/Room Closing option does not appear in Room Reserve. Please see the Events User Manual for additional information.

Section 4. Patron Reservation Lookup

Patron Reservation Lookup allows you to search the reservation database using a patron’s contact information or confirmation number.

 **Note:** Accuracy and consistency when entering patron information impacts how a reservation list appears in Patron Reservation Lookup. When a patron’s information (name, phone, e-mail address, etc.) is entered the same way each time, the system creates one patron record with one list of reservations. When information is entered inconsistently or contains errors (i.e., misspellings, name variations, etc.), the system creates separate records for each variation. For example, if Jane Doe is always entered as “Jane Doe”, Jane Doe will have one record with an associated reservations list in the system. If Jane Doe is entered as “Jane Doe,” “J. Doe”, or “Janet Doe,” the system creates three patron records, each containing a list of reservations associated with that name variation. Fields are case sensitive.

There are three (3) levels accessible from Patron Reservation Lookup:

1. The *search level* allows you to access patron records matching selected criteria and send an e-mail when an address is on file.
2. The *patron record level* allows you to make global changes to contact information, view and sort a list of reservations, and view or edit Reservation Forms. Changes made to a patron’s Contact Information Form updates all associated Reservation Records.
3. The *reservation level* allows you to access a Reservation Form in View or Edit mode.
 - A. View Mode:
 1. Provides a link to a read-only list of all reservations that appear under the same contact name (VIEW OTHER REQUESTS/RESERVATIONS).
 2. Allows you to update administrative fields (i.e., Internal Classifications, Notes and Attendance).
 3. Allows you to ACCEPT, DENY and ARCHIVE a reservation.

The table below compares the features of the Reservation Form in View mode based on its access point – from Patron Reservation Lookup or Requests/Reservations.

Feature/Function	Patron Lookup	Requests/Reservations
Access to system tool bar	N	Y
Edit Admin Fields	Y	Y

Feature/Function	Patron Lookup	Requests/Reservations
EDIT (toggle to Edit mode)	N	Y
VIEW CONFIRMATION	N	Y
VIEW OTHER REQUESTS/RESERVATIONS	Y	Y
ACCEPT	Y	Y
DENY	Y	Y
ARCHIVE	Y	Y
CLOSE	Y	N
BACK	N	Y

B. Edit Mode:

1. Allows you to revise the Reservation Form.
2. Allows you to toggle to View mode.

The table below compares the features of the Reservation Form in Edit Mode based on how the form its access point – Patron Reservation Lookup or Requests/Reservations.

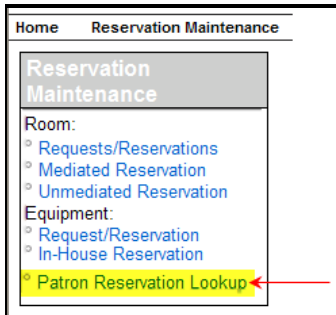
Feature/Function	Patron Lookup	Requests/Reservations
Access to system tool bar	N	Y
VIEW (toggle to View mode)	Y	Y
CHANGE RESERVATION	Y	Y
MEETING POLICY	Y	Y
VIEW ROOM SETUP OPTIONS	Y	Y
VERIFY REQUEST	Y	Y
CLOSE	Y	N
BACK	N	Y

A. Instructions for Using Patron Reservation Lookup

This section contains independent sets of instructions for the functions available in Patron Reservation Lookup. While this results in some redundancy, it eliminates the needs to reference prior sections to accomplish your goal.

How To Do It - Searching for a Patron Record

1. Beginning at the Home Page, click PATRON RESERVATION LOOKUP (*Reservation Maintenance* menu).



The system displays the Search Contact Information form illustrated below.

The screenshot shows the 'Patron Reservation Lookup' form. At the top right, there is a 'Text Size' control with three buttons labeled 'T', 'T', and 'T'. Below this is a navigation bar with links: Home, Reservation Maintenance, Reports, Setup, System Settings, About, and Logoff: Admin Level. The main content area contains the instruction: 'Enter the search criteria (partial information is OK), click Search, and any matches found are displayed.' Below this is a 'Search Contact Information' form with the following fields: Library Card Number, Confirmation Number, Contact Name, Contact Phone Number, Contact Email, Organization, Show All Names (checkbox), and Reservation Timeframe (radio buttons for All, 2008, Last, and a text input for 365 Days). At the bottom of the form are two buttons: 'Search' and 'Back to Maintenance Page'.

2. Enter one or more search criteria into the Search Contact Information form. The system accepts partial information. Fields are case sensitive.
3. Select one – A or B - of the following to proceed:
 - A. Click SEARCH to run the search. The system displays the Patron List illustrated below. This view allows you to e-mail a patron, access a list of reservations associated with each patron and return to the Home Page.

Patron Reservation Lookup

Text Size
T T T

Home
Reservation Maintenance
Reports
Setup
System Settings
About
Logoff: Admin Level

Enter the search criteria (partial information is OK), click Search, and any matches found are displayed.

Search Contact Information

Library Card Number:	<input type="text"/>
Confirmation Number:	<input type="text"/>
Contact Name:	<input type="text" value="Doe"/>
Contact Phone Number:	<input type="text"/>
Contact Email:	<input type="text"/>
Organization:	<input type="text"/>
Show All Names:	<input type="checkbox"/>
Reservation Timeframe:	<input checked="" type="radio"/> All <input type="radio"/> 2008 <input type="radio"/> Last <input style="width: 40px;" type="text" value="365"/> Days

Search
Back to Maintenance Page

By Status (P/PP/A) indicates how many of the patron's reservations are classified as Pending (P), Payment Pending (PP) and Accepted (A).

Name	Library Card #	Primary Phone	Secondary Phone	Email	Reservations	By Status (P/PP/A)	
John Doe	123456	555-1212	555-1213	john.doe@email.com	1	0/1/0	View/Edit

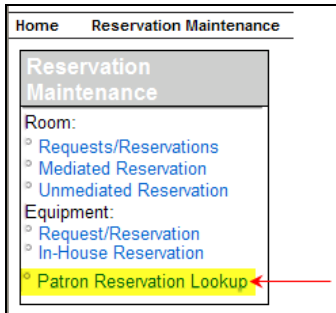
Back to Maintenance Page

B. Click BACK TO MAINTENANCE PAGE to return to the Home Page.

How To Do It - Emailing a Patron from Patron Reservation Lookup

Patron Reservation Lookup allows you to send an e-mail to a patron with an e-mail address on file.

1. Beginning at the Home Page, click PATRON RESERVATION LOOKUP (*Reservation Maintenance* menu).



The system displays the Search Contact Information form illustrated below.

The screenshot shows the 'Patron Reservation Lookup' search form. At the top right, there is a 'Text Size' control with three buttons labeled 'T', 'T', and 'T'. Below the title is a navigation bar with links: Home, Reservation Maintenance, Reports, Setup, System Settings, About, and Logoff: Admin Level. A message reads: 'Enter the search criteria (partial information is OK), click Search, and any matches found are displayed.' The main form is titled 'Search Contact Information' and contains several input fields: 'Library Card Number:', 'Confirmation Number:', 'Contact Name:', 'Contact Phone Number:', 'Contact Email:', and 'Organization:'. There is also a 'Show All Names:' checkbox which is currently unchecked. At the bottom, there is a 'Reservation Timeframe:' section with radio buttons for 'All' (selected), '2008', and 'Last 365 Days'. Below the form are two buttons: 'Search' and 'Back to Maintenance Page'.

2. Enter one or more search criteria into the Search Contact Information form. The system accepts partial information. Fields are case sensitive.
3. Click SEARCH. The system displays the Patron List illustrated below.

Patron Reservation Lookup

Text Size

T T T

Home Reservation Maintenance Reports Setup System Settings About Logoff: Admin Level

Enter the search criteria (partial information is OK), click Search, and any matches found are displayed.

Search Contact Information

Library Card Number:	<input type="text"/>
Confirmation Number:	<input type="text"/>
Contact Name:	<input type="text" value="Doe"/>
Contact Phone Number:	<input type="text"/>
Contact Email:	<input type="text"/>
Organization:	<input type="text"/>
Show All Names:	<input type="checkbox"/>
Reservation Timeframe:	<input checked="" type="radio"/> All <input type="radio"/> 2008 <input type="radio"/> Last <input type="text" value="365"/> Days

Search
Back to Maintenance Page

By Status (P/PP/A) indicates how many of the patron's reservations are classified as Pending (P), Payment Pending (PP) and Accepted (A).

Name	Library Card #	Primary Phone	Secondary Phone	Email	Reservations	By Status (P/PP/A)	
John Doe	123456	555-1212	555-1213	john.doe@email.com	1	0/1/0	View/Edit

Back to Maintenance Page

4. Locate the desired patron and click on the associated e-mail address. The system displays a blank message using your e-mail software.
5. Compose your message as desired.
6. Click SEND. The system sends the e-mail, closes the message window and returns to the Patron List illustrated in Step 3 above.
7. Click BACK TO MAINTENANCE page to return to the Home Page or use the tool bar at the top of the page to navigate to another Room Reserve function.

How To Do It - Accessing a Patron Record

1. Beginning at the Home Page, click PATRON RESERVATION LOOKUP (*Reservation Maintenance* menu).

Home Reservation Maintenance

Reservation Maintenance

Room:

- [Requests/Reservations](#)
- [Mediated Reservation](#)
- [Unmediated Reservation](#)

Equipment:

- [Request/Reservation](#)
- [In-House Reservation](#)
- [Patron Reservation Lookup](#)

The system displays the Search Contact Information form illustrated below.

Text Size
T T T

[Home](#) [Reservation Maintenance](#) [Reports](#) [Setup](#) [System Settings](#) [About](#) [Logoff: Admin Level](#)

Enter the search criteria (partial information is OK), click Search, and any matches found are displayed.

Search Contact Information

Library Card Number:

Confirmation Number:

Contact Name:

Contact Phone Number:

Contact Email:

Organization:

Show All Names:

Reservation Timeframe: All 2008 Last Days

2. Enter one or more search criteria into the Search Contact Information form. The system accepts partial information. Fields are case sensitive.
3. Click SEARCH to run the search. The system displays the Patron List illustrated below.

Text Size
T T T

[Home](#) [Reservation Maintenance](#) [Reports](#) [Setup](#) [System Settings](#) [About](#) [Logoff: Admin Level](#)

Enter the search criteria (partial information is OK), click Search, and any matches found are displayed.

Search Contact Information

Library Card Number:

Confirmation Number:

Contact Name:

Contact Phone Number:

Contact Email:

Organization:

Show All Names:

Reservation Timeframe: All 2008 Last Days

Name	Library Card #	Primary Phone	Secondary Phone	Email	Reservations	By Status (P/PP/A)	
John Doe	123456	555-1212	555-1213	john.doe@email.com	1	0/1/0	<input type="button" value="View/Edit"/>

By Status (P/PP/A) indicates how many of the patron's reservations are classified as Pending (P), Payment Pending (PP) and Accepted (A).

4. Click the VIEW/EDIT button associated with the desired patron. The system displays the Patron Record illustrated below. Users may edit the Contact Information fields. By default the system sorts by reservations branch and then date. To resort the list, click on any of the underlined column headings.

Text Size
↑ T ↓

Home Reservation Maintenance Reports Setup System Settings About Logoff: Admin Level

Patron Reservation Lookup

Contact Information	
Name:	John Doe
Library Card Number:	123456
Primary Phone Number:	(888) 555 - 1212
Secondary Phone Number:	(888) 555 - 1213
Email:	john.doe@email.com
Pin Number:	1234
Fax:	(888) 555 - 1200
Address 1:	1234 Street Name
Address 2:	
City:	Somewhere
State:	IN <input type="button" value="v"/>
Zip:	12345

Note: The Contact Information can be edited and saved.

Reservations	By Status (P/PP/A)
1	0/1/0

By clicking the underlined column headings, the reservation list can be sorted different ways

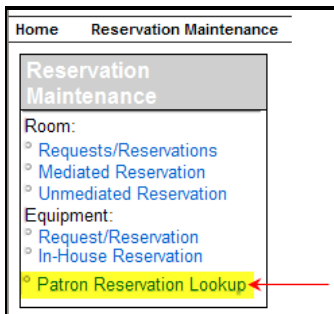
BRANCH	<u>ROOM NAME</u>	<u>RESERVE DATE</u>	<u>START TIME</u>	END TIME	<u>ORGANIZATION</u>	CONFIRMATION	STATUS	
North Branch	Auditorium - Half	Wednesday, February 20, 2008	10:00 AM	11:00 AM	Asdfasdf	ECAQCJU	Pay Pending	View/Edit
North Branch	DVD Player	Wednesday, February 20, 2008	10:00 AM	11:00 AM	Asdfasdf	ECAQCJU	Pay Pending	View/Edit

*The Branch column only appears in multi-branch library systems.

5. Click BACK to return to the Patron List (illustrated in Step 3).
6. Click BACK TO MAINTENANCE page to return to the Home Page or use the tool bar at the top of the page to navigate to another Room Reserve function.

How To Do It - Editing Contact Information

1. Beginning at the Home Page, click PATRON RESERVATION LOOKUP (*Reservation Maintenance* menu).



The system displays the Search Contact Information form illustrated below.

Text Size
T T T

[Home](#) [Reservation Maintenance](#) [Reports](#) [Setup](#) [System Settings](#) [About](#) [Logoff: Admin Level](#)

Enter the search criteria (partial information is OK), click Search, and any matches found are displayed.

Search Contact Information

Library Card Number:

Confirmation Number:

Contact Name:

Contact Phone Number:

Contact Email:

Organization:

Show All Names:

Reservation Timeframe: All 2008 Last Days

2. Enter one or more search criteria into the Search Contact Information form. The system accepts partial information. Fields are case sensitive.
3. Click SEARCH to run the search. The system displays the Patron List illustrated below.

Text Size
T T T

[Home](#) [Reservation Maintenance](#) [Reports](#) [Setup](#) [System Settings](#) [About](#) [Logoff: Admin Level](#)

Enter the search criteria (partial information is OK), click Search, and any matches found are displayed.

Search Contact Information

Library Card Number:

Confirmation Number:

Contact Name:

Contact Phone Number:

Contact Email:

Organization:

Show All Names:

Reservation Timeframe: All 2008 Last Days

Name	Library Card #	Primary Phone	Secondary Phone	Email	Reservations	By Status (P/PP/A)	
John Doe	123456	555-1212	555-1213	john.doe@email.com	1	0/1/0	<input type="button" value="View/Edit"/>

By Status (P/PP/A) indicates how many of the patron's reservations are classified as Pending (P), Payment Pending (PP) and Accepted (A).

4. Click the VIEW/EDIT option associated with the desired patron. The system displays the Patron Record illustrated below.

Patron Reservation Lookup

Text Size

↑ ↓ ↔

Home Reservation Maintenance Reports Setup System Settings About Logoff: Admin Level

Contact Information	
Name:	John Doe
Library Card Number:	123456
Primary Phone Number:	(888) 555 - 1212
Secondary Phone Number:	(888) 555 - 1213
Email:	john.doe@email.com
Pin Number:	1234
Fax:	(888) 555 - 1200
Address 1:	1234 Street Name
Address 2:	
City:	Somewhere
State:	IN <input type="button" value="v"/>
Zip:	12345

Reservations	By Status (P/PP/A)
1	0/1/0

By clicking the underlined column headings, the reservation list can be sorted different ways

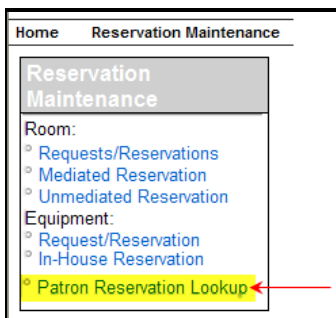
BRANCH	<u>ROOM NAME</u>	<u>RESERVE DATE</u>	<u>START TIME</u>	END TIME	<u>ORGANIZATION</u>	CONFIRMATION	STATUS	
North Branch	Auditorium - Half	Wednesday, February 20, 2008	10:00 AM	11:00 AM	Asdfasdf	ECAQCJU	Pay Pending	View/Edit
North Branch	DVD Player	Wednesday, February 20, 2008	10:00 AM	11:00 AM	Asdfasdf	ECAQCJU	Pay Pending	View/Edit

*The Branch column only appears in multi-branch library systems.

5. Tab over or click on the desired field. By default, the cursor begins in the Contact Name field.
6. Revise contact information as desired.
7. Click SAVE. The system saves and updates the Contact Information in the patron record and on all associated Reservation Forms.
8. Click BACK to return to the Patron List.
9. Click BACK TO MAINTENANCE page to return to the Home Page or use the tool bar at the top of the page to navigate to another Room Reserve function.

How To Do It - Working with the Reservation Form in View Mode

1. Beginning at the Home Page, click PATRON RESERVATION LOOKUP (*Reservation Maintenance* menu).



The system displays the Search Contact Information form illustrated below.

Patron Reservation Lookup

Text Size
T T T

[Home](#)
[Reservation Maintenance](#)
[Reports](#)
[Setup](#)
[System Settings](#)
[About](#)
[Logoff: Admin Level](#)

Enter the search criteria (partial information is OK), click Search, and any matches found are displayed.

Search Contact Information

Library Card Number:	<input type="text"/>
Confirmation Number:	<input type="text"/>
Contact Name:	<input type="text"/>
Contact Phone Number:	<input type="text"/>
Contact Email:	<input type="text"/>
Organization:	<input type="text"/>
Show All Names:	<input type="checkbox"/>
Reservation Timeframe:	<input checked="" type="radio"/> All <input type="radio"/> 2008 <input type="radio"/> Last <input type="text" value="365"/> Days

[Search](#)
[Back to Maintenance Page](#)

2. Enter one or more search criteria into the Search Contact Information form. The system accepts partial information.
3. Click SEARCH to run the search. The system displays the Patron List illustrated below.

Patron Reservation Lookup

Text Size
T T T

[Home](#)
[Reservation Maintenance](#)
[Reports](#)
[Setup](#)
[System Settings](#)
[About](#)
[Logoff: Admin Level](#)

Enter the search criteria (partial information is OK), click Search, and any matches found are displayed.

Search Contact Information

Library Card Number:	<input type="text"/>
Confirmation Number:	<input type="text"/>
Contact Name:	<input type="text" value="Doe"/>
Contact Phone Number:	<input type="text"/>
Contact Email:	<input type="text"/>
Organization:	<input type="text"/>
Show All Names:	<input type="checkbox"/>
Reservation Timeframe:	<input checked="" type="radio"/> All <input type="radio"/> 2008 <input type="radio"/> Last <input type="text" value="365"/> Days

[Search](#)
[Back to Maintenance Page](#)

Name	Library Card #	Primary Phone	Secondary Phone	Email	Reservations	By Status (P/PP/A)	
John Doe	123456	555-1212	555-1213	john.doe@email.com	1	0/1/0	View/Edit

[Back to Maintenance Page](#)

By Status (P/PP/A) indicates how many of the patron's reservations are classified as Pending (P), Payment Pending (PP) and Accepted (A).

4. Click the VIEW/EDIT option associated with the desired patron. The system displays the Patron Record illustrated below.

Text Size
T T T

Patron Reservation Lookup

[Home](#) [Reservation Maintenance](#) [Reports](#) [Setup](#) [System Settings](#) [About](#) [Logoff: Admin Level](#)

Contact Information	
Name:	John Doe
Library Card Number:	123456
Primary Phone Number:	(888) 555 - 1212
Secondary Phone Number:	(888) 555 - 1213
Email:	john.doe@email.com
Pin Number:	1234
Fax:	(888) 555 - 1200
Address 1:	1234 Street Name
Address 2:	
City:	Somewhere
State:	IN
Zip:	12345

Reservations	By Status (P/PP/A)
1	0/1/0

By clicking the underlined column headings, the reservation list can be sorted different ways

BRANCH	ROOM NAME	RESERVE DATE	START TIME	END TIME	ORGANIZATION	CONFIRMATION	STATUS	
North Branch	Auditorium - Half	Wednesday, February 20, 2008	10:00 AM	11:00 AM	Asdfasdf	ECAQCJU	Pay Pending	View/Edit
North Branch	DVD Player	Wednesday, February 20, 2008	10:00 AM	11:00 AM	Asdfasdf	ECAQCJU	Pay Pending	View/Edit

Note: The Contact Information can be edited and saved.

*The Branch column only appears in multi-branch library systems.

5. Click the **VIEW** link associated with the desired reservation. The system opens the Reservation Form in View mode.
6. View mode allows you to perform the following actions:
 - A. Accept a Reservation by clicking **ACCEPT** at the end of the Reservation Form. The system automatically sends a status change e-mail to the Reservation Contact, if an e-mail address is on file, and displays the following confirmation:

A status change e-mail has been sent to: [e-mail address].

- (i) Click **OK** to close the confirmation message.

The system automatically moves the reservation from Pending Requests to Accepted Reservations, closes the Reservation Form, and returns to the Patron Record.

- B. Deny a Reservation by clicking **DENY** at the end of the form. The system automatically sends a status change e-mail to the Reservation Contact, if an e-mail address is on file, and displays the following confirmation:

You have denied the request.
 By clicking **YES**, the request will be permanently removed from the list and signifies that the contact has been notified.
 By clicking **NO**, the request will remain on the list until the contact can be notified.

Contact Information:
 Organization Name:
 Contact Name:
 Phone Number:
 Fax Number:
 E-mail Address:

Do you want to remove the request?

- (i) Click YES to move the reservation from Pending Requests to the Archive. **Or**
- (ii) Click NO to retain the reservation in Pending Requests for further follow-up.

The system closes the Reservation Form and returns to the Patron Record.

C. Archive the Reservation by clicking ARCHIVE. The system moves the reservation to the Archive without secondary confirmation, removes the reservation from the patron's reservation list, and closes the Reservation Form.

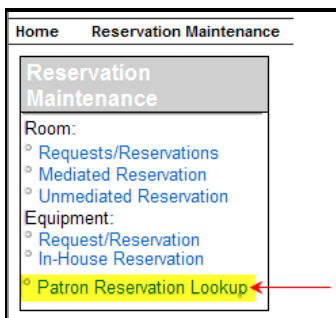
D. Closing the Reservation Form by clicking CLOSE.

The system closes the Reservation Form and returns to the Patron Record illustrated in Step 4.

- 7. Click BACK to return to the Patron List illustrated in Step 3.
- 8. Click BACK TO MAINTENANCE page to return to the Home Page or use the tool bar at the top of the page to navigate to another Room Reserve function.

How To Do It - Working with the Reservation Form in Edit Mode

- 1. Beginning at the Home Page, click PATRON RESERVATION LOOKUP (*Reservation Maintenance* menu).



The system displays the Search Contact Information form illustrated below.

Patron Reservation Lookup	
Text Size T T T	
Home Reservation Maintenance Reports Setup System Settings About Logoff: Admin Level	
Enter the search criteria (partial information is OK), click Search, and any matches found are displayed.	
Search Contact Information	
Library Card Number:	<input type="text"/>
Confirmation Number:	<input type="text"/>
Contact Name:	<input type="text"/>
Contact Phone Number:	<input type="text"/>
Contact Email:	<input type="text"/>
Organization:	<input type="text"/>
Show All Names:	<input type="checkbox"/>
Reservation Timeframe:	<input checked="" type="radio"/> All <input type="radio"/> 2008 <input type="radio"/> Last <input type="text" value="365"/> Days
<input type="button" value="Search"/> <input type="button" value="Back to Maintenance Page"/>	

- 2. Enter one or more search criteria into the Search Contact Information form. The system accepts partial information.

- Click SEARCH to run the search. The system displays the Patron List illustrated below.

Patron Reservation Lookup

Text Size
T T T

Home Reservation Maintenance Reports Setup System Settings About Logoff: Admin Level

Enter the search criteria (partial information is OK), click Search, and any matches found are displayed.

Search Contact Information

Library Card Number:

Confirmation Number:

Contact Name:

Contact Phone Number:

Contact Email:

Organization:

Show All Names:

Reservation Timeframe: All 2008 Last Days

By Status (P/PP/A) indicates how many of the patron's reservations are classified as Pending (P), Payment Pending (PP) and Accepted (A).

Name	Library Card #	Primary Phone	Secondary Phone	Email	Reservations	By Status (P/PP/A)	
John Doe	123456	555-1212	555-1213	john.doe@email.com	1	0/1/0	<input type="button" value="View/Edit"/>

- Click the VIEW/EDIT option associated with the desired patron.

The system displays the Patron Record illustrated below.

Patron Reservation Lookup

Text Size
T T T

Home Reservation Maintenance Reports Setup System Settings About Logoff: Admin Level

Contact Information

Name:

Library Card Number:

Primary Phone Number:

Secondary Phone Number:

Email:

Pin Number:

Fax:

Address 1:

Address 2:

City:

State:

Zip:

Note: The Contact Information can be edited and saved.

Reservations	By Status (P/PP/A)
1	0/1/0

By clicking the underlined column headings, the reservation list can be sorted different ways

BRANCH	ROOM NAME	RESERVE DATE	START TIME	END TIME	ORGANIZATION	CONFIRMATION	STATUS	
North Branch	Auditorium - Half	Wednesday, February 20, 2008	10:00 AM	11:00 AM	Asdfasdf	ECAQCJU	Pay Pending	View/Edit
North Branch	DVD Player	Wednesday, February 20, 2008	10:00 AM	11:00 AM	Asdfasdf	ECAQCJU	Pay Pending	View/Edit

*The Branch column only appears in multi-branch library systems.

- Click the EDIT link associated with the desired reservation. The system opens the Reservation Form in Edit mode.

6. Edit Mode allows you to perform the following actions:
 - A. Edit the Reservation:
 - (i) Edit the reservation as desired.
 - (ii) Review the reservation to ensure accuracy.
 - ▼ **Once you proceed from here, you cannot return to Edit mode without starting back at the Patron Record list displayed above.**
 - (iii) Click VERIFY REQUEST at the end of the form.
 - 👉 **Note:** The system displays an error message if required information is missing. Enter missing information and click VERIFY REQUEST again.

The system displays a Room Request Summary.
 - (iv) Review the reservation to ensure that all information is correct.
 - (v) Select one of the following to close out of the Reservation Form:
 - (a) Click SUBMIT to save changes and return to the Patron Record. Or,
 - (b) Click CLOSE to return to the Patron Record. The system cancels any changes.
 - B. Toggle to View Mode:
 - (i) Click VIEW to change the Reservation Form from Edit mode to View mode. See How To Do It - Working with the Reservation Form in View Mode (page 61) (beginning with Step 6) for more information.
 - C. Closing the Reservation Form:
 - (i) Click CLOSE to close the Reservation Form and return to the Patron Record (illustrated in Step 4).
7. Click BACK to return to the Patron List (illustrated in Step 3).
8. Click BACK TO MAINTENANCE page to return to the Home Page or use the tool bar at the top of the page to navigate to another Room Reserve function.

CHAPTER IV. REPORTS

Room Reserve includes a pre-configured set of reports. The number and type of reports that appear on your menu depends on the configuration of your system. The table below describes when the available reports appear.

Report	Room Reserve	Equipment Inventory Enabled	Events Enabled
Requested Equipment	✓		
Requested Room Setups	✓		
View/Print Room Schedules	✓		
View/Print Detailed Room Schedules	✓		
Room Usage Report			
Room usage: Reservations v. Events			✓
Room Utilization Report	✓		
Requested Bookable Equipment		✓	
View/Print Bookable Equipment Schedules		✓	
Bookable Equipment usage Report		✓	
Equipment Utilization Report		✓	

In this chapter you will find,

- An overview of the available reports
- A description of the general principles and definitions that govern reports
- Instructions about how to run reports

Section 1. General Principles and Definitions

A. Principles

1. Reports cannot be added, deleted or reformatted.
2. To reformat or manipulate a report, save the report to Word or Excel.
3. The report filter determines what and how much information appears on a report.
4. The system displays reservations entered through Events in bold.

B. The Report Filter

Room Reserve uses report filters to determine the type and amount of information that appears on reports. The table below defines the fields that appear on the report filters.

Term	Definition
Action	<i>Action</i> determines whether the system displays a report on screen or sends it directly to the printer. <i>Action</i> appears on the Report Filters of all reports.

Term	Definition
Date Range Fields	<p>Date range fields determine the range of information that appears on a report. Your options include:</p> <ul style="list-style-type: none"> • <i>This Week</i> displays information encompassing the seven days (beginning Sunday and ending Saturday) that includes the selected date. The report will display only those days that contain reservations. • <i>This Month</i> displays information encompassing the calendar month that includes the specified date. • <i>Specific Day</i> displays information for a single selected date. • <i>Date Range</i> displays information for the selected date range. This field displays options for the past and the future. <p>Date Range fields appear on all request and schedule Report Filters.</p>
Display By	<p><i>Display By</i> refers to how report information is categorized:</p> <ul style="list-style-type: none"> • <i>Date</i> categorizes information by day and date, then room (or equipment) name. • <i>Room (or Equipment)</i> categorizes information by room (or equipment) name, then date. • <i>Full List</i> generates a report in list format sorted by room (or equipment) name. • <i>Include Archived Items</i> tells the system to pull data from the Archive as well as the reservations database. <p><i>Display By</i> appears on the Report Filter of all schedule type reports.</p>
Format	<p><i>Format</i> determines the application format the system uses to create the report – HTML, Word or Excel. Select Word or Excel when saving or using the report in other documents. <i>Format</i> appears on the Report Filter of all reports.</p>
Include Bookable Equipment	<p><i>Include Bookable Equipment</i> refers to equipment that users can reserve without a room. This field appears only when Equipment Inventory is enabled and is associated with the Requested Equipment Report.</p>
Include Customizable Questions	<p><i>Include Customizable Questions</i> refers to any custom questions that appear on a room’s Reservation Form. Custom questions are configured on a per room basis. Some rooms may have them, some may not, and they may be different from room to room depending on your system’s configuration.</p>
Order By	<p><i>Order By</i> determines how the system sorts a report – by Room Name, Reserve Date, Start Time, Equipment or Organization. This field appears only on the “Requested . . .” reports – Requested Equipment, Requested Room Setups and the Requested Bookable Equipment reports.</p>

Term	Definition
Reservation Type	<i>Reservation Type</i> allows you to select which reservations to include in your report – Events only, Rooms only or All reservations. This field only appears when Events is installed and enabled and appears on only on the utilization reports (Room Utilization Report and Equipment Utilization Report).
Select a Date Range	<i>Select a Date Range</i> determines the range of information – up to 12 months – that appears on a report. This field allows you to obtain information from the past to the present. It appears on the Report filter for all usage and utilization reports.
Select Equipment	<i>Select Equipment</i> contains a list of equipment available for reservation and allows users to limit the content of their reports to one or more types of equipment. The System Administrator creates the equipment list during configuration. This field appears on Report Filter for the Bookable Equipment reports and the Equipment Utilization Report.
Select a Room (or Select Mediated Room(s) and Select Unmediated Room(s))	<i>Select a Room</i> contains a list of all rooms and locations available for reservation and allows users to limit the content of their reports. The System Administrator configures the list of rooms during configuration. This field appears on the Report Filter of all room-related reports and the Requested Equipment Report.
Select Start/End Time	<i>Select Start/End Time</i> refers to the range of time - Standard Room Hours, Extended Room Hours or Selected Room Hours. Selected Room Hours reveals additional field options for selecting a time range. It appears on the Room Utilization and Equipment Utilization reports.
Show Detailed Report	<i>Show Detailed Report</i> adds the following fields to a Room Schedule report: Attendees, Setup, Notes, Equipment Quantity. This field appears on the View/Print Room Schedule Reports.
Status	<i>Status</i> refers to reservation status (Reserved, Payment Pending, Pending, Denied and Cancelled). This field appears on the Report Filter of all reports, except the usage reports.
Summarize By	<i>Summarize By</i> allows users to choose how to organize information in the report – Day, Week or Month. This field appears on the Report Filter of Room Utilization and Equipment Utilization reports.
View	<i>View</i> is a hyperlink to a Reservation Form that appears on request-related reports (i.e., Equipment, Room Setup, and Bookable Equipment).

Section 2. The Reports

A. Requested Equipment

Request Equipment generates a list of equipment reservations with a high-level overview of basic reservation information. The equipment on this report is associated with a room reservation. When displayed onscreen, the report contains a link (VIEW) to the full Reservation Form. For a report of equipment only reservations, see Requested Bookable Equipment.

Report Filter

Requested Equipment

Text Size

T T T

Home Reservation Maintenance Reports Setup System Settings About Logout: Admin Level

This Week
 This Month

Specific Day: Jul 17 2008 [X] [X]

Date Range: Jul 17 2008 [X] [X] - Jul 17 2008 [X] [X]

Select Mediated Room(s)

Select All

Auditorium - Full

Auditorium - Half

Community Room A

Community Room A/B

Community Room B

Large Conference Room

Small Conference Room

Select Unmediated Room(s)

Select All

Staff Room

Study Room A

Study Room B

Study Room C

Include Bookable Equipment:

Include Custom Questions: Yes No

Status: All [v]

Format: HTML Word Excel

Action: Display Print

Order By: Room Name [v]

← **Include Bookable Equipment** only appears if Equipment Inventory is enabled and there is equipment has been entered into inventory.

Report Result

	ROOM	RESERVE DATE	STATUS	START TIME	END TIME	EQUIPMENT	QTY	ORGANIZATION	CUSTOM 1
VIEW	Room 1	Tuesday, July 01, 20__	Pending	12:00 PM	3:00 PM	DVD Player	1	Organization 1	
VIEW	Room 2	Tuesday, July 01, 20__	Pay Pending	12:00 PM	3:00 PM	LCD Projector	1	Organization 2	
VIEW	Room 3	Thursday, July 24, 20__	Reserved	12:00 PM	3:00 PM	Projector Screen (Ceiling Mounted)	1	Organization 3	

* This column only appears if *Include Custom Question* is set to "Yes."

B. Requested Room Setups

Requested Room Setups generates a list of room reservations with a high-level overview of basic reservation information that includes room setup. The format of this report is consistent with the Requested Equipment Report. The Setup column of the Requested Room Setups report replaces the Equipment and Quantity column of the Requested Equipment report. When displayed onscreen, the report contains a link (VIEW) to the full Reservation Form.

Report Filter

Requested Room Setups

Text Size
T T T

Home
Reservation Maintenance
Reports
Setup
System Settings
About
Logout: Admin Level

This Week This Month

Specific Day: Jul 17 2008

Date Range: Jul 17 2008 - Jul 17 2008

Select Mediated Room(s)

<input checked="" type="checkbox"/> Select All	<input checked="" type="checkbox"/> Auditorium - Full	<input checked="" type="checkbox"/> Auditorium - Half	<input checked="" type="checkbox"/> Community Room A
<input checked="" type="checkbox"/> Community Room A/B	<input checked="" type="checkbox"/> Community Room B	<input checked="" type="checkbox"/> Large Conference Room	
<input checked="" type="checkbox"/> Small Conference Room			

Select Unmediated Room(s)

<input type="checkbox"/> Select All	<input type="checkbox"/> Staff Room	<input type="checkbox"/> Study Room A	<input type="checkbox"/> Study Room B
<input type="checkbox"/> Study Room C			

Include Custom Questions: Yes No

Status: All

Format: HTML Word Excel

Action: Display Print

Order By: Room Name

[Submit](#)

Report Results

	ROOM	RESERVE DATE	STATUS	START TIME	END TIME	SETUP	ORGANIZATION	CUSTOM 1 ²
VIEW	Room 1	Wednesday, July 09, 20__	Reserved	2:00 PM	4:00 PM	U-Style Banquet	Organization 1	
VIEW	Room 1	Wednesday, July 23, 20__	Reserved	2:00 PM	4:00 PM	U-Style Banquet	Organization 1	
	<i>¹Room 1</i>	<i>Monday, July 28, 20__</i>	<i>Reserved</i>	<i>12:45 PM</i>	<i>3:15 PM</i>	<i>Chairs Around Room</i>	<i>New Reading Event for Kids</i>	

¹Events with a room reservation appear on this report as bold and italicized line items. There is no link to the original Reservation Form because this reservation originated from Events. This only occurs when Room Reserve works with Events.

²This column only appears if Include Custom Question is set to "Yes."

C. View/Print Room Schedules

View/Print Room Schedules generates a room schedule that includes basic reservation information – date, time room, description, name of the sponsoring organization, and reservation status. The report displays any attached graphics.

Report Filter

Text Size

Home Reservation Maintenance Reports Setup System Settings About Logoff: Admin Level

This Week This Month

Specific Day: Jul 17 2008

Date Range: Jul 17 2008 - Jul 17 2008

Select Mediated Room(s)

<input checked="" type="checkbox"/> Select All	<input checked="" type="checkbox"/> Auditorium - Full	<input checked="" type="checkbox"/> Auditorium - Half	<input checked="" type="checkbox"/> Community Room A
<input checked="" type="checkbox"/> Community Room A/B	<input checked="" type="checkbox"/> Community Room B	<input checked="" type="checkbox"/> Large Conference Room	
<input checked="" type="checkbox"/> Small Conference Room			

Select Unmediated Room(s)

<input type="checkbox"/> Select All	<input type="checkbox"/> Staff Room	<input type="checkbox"/> Study Room A	<input type="checkbox"/> Study Room B
<input type="checkbox"/> Study Room C			

Include Custom Questions: Yes No

Status: All

Format: HTML Word Excel

Action: Display Print

Display By: Date Room **OR** Full List Include Archived Items

Show detailed report (Include equipment information)

Report Results

Display by Date

Thursday, 10/25/2007					
Location	Time	DESCRIPTION	ORGANIZATION	STATUS	CUSTOM 1
Room A	Start: Meeting Start: Meeting End: End:	Meeting description	Organization 1	Reserved	This field only appears if the Include Custom Questions field is checked "Yes" on the filter.
	Start: Meeting Start: Meeting End: End:	Meeting Description	Organization 2	Pending	
Friday, 10/26/2007					
Location	Time	DESCRIPTION	ORGANIZATION	STATUS	CUSTOM 1
Room A	Start: Meeting Start: Meeting End: End:	Meeting Description	Organization 1	Reserved	Response to custom question.
Room B	Start: Meeting Start: Meeting End: End:	Meeting Description	Organization 3	Reserved	

Display by Room

Room A				
Date	Time	DESCRIPTION	ORGANIZATION	STATUS
Thursday, 10/25/2007	Start: Meeting Start: Meeting End: End:	This is a description of the meeting.	Sponsoring Organization 1	Reserved
	Start: Meeting Start: Meeting End: End:	This is a description of the meeting.	Sponsoring Organization 2	Pending
Room B				
Date	Time	DESCRIPTION	ORGANIZATION	STATUS
Thursday, 10/25/2007	Start: Meeting Start: Meeting End: End:	This is a description of the meeting.	Sponsoring Organization 1	Reserved
Friday, 10/26/2007	Start: Meeting Start: Meeting End: End:	This is a description of the meeting.	Sponsoring Organization 3	Reserved

Full List Report

Room	Date	START TIME	MTG START TIME	MTG END TIME	END TIME	DESCRIPTION	ORGANIZATION	STATUS
Room	7/10/2007	9:00 AM	9:00 AM	9:30 AM	9:30 AM	Description 1	Organization 1	Reserved
Room	7/12/2007	1:00 PM	1:00 PM	1:30 PM	1:30 PM	Description 2	Organization 2	Pay Pending
Room	7/23/2007	9:00 AM	9:00 AM	10:30 AM	10:30 AM	Description 3	Organization 3	Pending

Detailed Report

The Detailed Report adds the shaded fields in the illustration below - Attendee, Setup, Notes, Equipment, Quantity and Type (i.e., room or equipment) to any of the report formats illustrated above. The report below illustrates the Full List Detailed Report. The system also generates Detailed Reports from the View/Print Detailed Room Schedules Report. See the following section – View/Print Detailed Room Schedules – for additional illustrations.

Room	Date	START TIME	MTG START TIME	MTG END TIME	END TIME	DESCRIPTION	ORGANIZATION	STATUS	ATTENDEES	SETUP	NOTES	EQUIPMENT	QUANTITY	TYPE
Room	7/10/2007	9:00 AM	9:00 AM	9:30 AM	9:30 AM	Description 1	Organization 1	Reserved	20	Classroom				Room
Room	7/12/2007	1:00 PM	1:00 PM	1:30 PM	1:30 PM	Description 2	Organization 2	Pay Pending	10	Theatre				Room
Room	7/23/2007	9:00 AM	9:00 AM	10:30 AM	10:30 AM	Description 3	Organization 3	Pending	10	Meeting				Event

D. View/Print Detailed Room Schedules

The View/Print Detailed Room Schedules generates a more detailed version of the View/Print Room Schedules report.

Report Filter

Text Size
T T T

Home
Reservation Maintenance
Reports
Setup
System Settings
About
Logoff: Admin Level

This Week
 This Month

Specific Day: Jul 17 2008

Date Range: Jul 17 2008 - Jul 17 2008

Select Mediated Room(s)
 Select All
 Auditorium - Full Auditorium - Half Community Room A
 Community Room A/B Community Room B Large Conference Room
 Small Conference Room

Select Unmediated Room(s)
 Select All
 Staff Room Study Room A Study Room B
 Study Room C

Include Custom Questions: Yes No

Status: All

Format: HTML Word Excel

Action: Display Print

Display By: Date Room Full List Include Archived Items

Show detailed report (Include equipment information)

Report Results

Display by Date

Thursday, 10/25/2007										
Location	Time	DESCRIPTION	ORGANIZATION	STATUS	ATTENDEES	SETUP	NOTES	EQUIPMENT	QTY	CUSTOM 1
Room A	Start: Meeting Start: Meeting End: End:	Meeting description	Organization	Reserved	25	Class		*Chairs *Flip Chart	25 1	This column only appears if <i>Include Custom Questions</i> is set to "Yes."
	Start: Meeting Start: Meeting End: End:	Meeting description	Organization	Pending	20	Open Square				
Friday, 10/26/2007										
Location	Time	DESCRIPTION	ORGANIZATION	STATUS	ATTENDEES	SETUP	NOTES	EQUIPMENT	QTY	CUSTOM 1
Room A	Start: Meeting Start: Meeting End: End:	Meeting description	Organization 1	Reserved	25	Class		*Chairs *Flip Chart	25 1	
Room B	Start: Meeting Start: Meeting End: End:	Meeting description	Organization 3	Reserved	20	Open Square		*Chairs *LCD Projector	20 1	

Display by Room

Room A									
DATE	Time	DESCRIPTION	ORGANIZATION	STATUS	ATTENDEES	SETUP	NOTES	EQUIPMENT	QUANTITY
Thursday, 10/25/2007	Start: Meeting Start: Meeting End: End:	This is a description of the meeting.	Sponsoring Organization 1	Reserved	25	Class		*Chairs *Flip Chart	25 1
	Start: Meeting Start: Meeting End: End:	This is a description of the meeting.	Sponsoring Organization 2	Pending	20	Open Square			
Room B									
DATE	Time	DESCRIPTION	ORGANIZATION	STATUS	ATTENDEES	SETUP	NOTES	EQUIPMENT	QUANTITY
Wednesday, 10/24/2007	Start: Meeting Start: Meeting End: End:	This is a description of the meeting.	Sponsoring Organization 1	Reserved	25	Class		*Chairs *Flip Chart	25 1
Thursday, 10/25/2007	Start: Meeting Start: Meeting End: End:	This is a description of the meeting.	Sponsoring Organization 3	Reserved	20	Open Square		*Chairs *LCD Projector	20 1

Full List Report

Room	Date	START TIME	MTG START TIME	MTG END TIME	END TIME	DESCRIPTION	ORGANIZATION	STATUS	ATTENDEES	SETUP	NOTES	EQUIPMENT	QUANTITY	TYPE
Room	7/10/2007	9:00 AM	9:00 AM	9:30 AM	9:30 AM	Description 1	Organization 1	Reserved	20	Classroom		Chairs	20	Room
Room	7/12/2007	1:00 PM	1:00 PM	1:30 PM	1:30 PM	Description 2	Organization 2	Pay Pending	10	Theatre		Flip Chart	1	Room
Room	7/23/2007	9:00 AM	9:00 AM	10:30 AM	10:30 AM	Description 3	Organization 3	Pending	10	Meeting				Event

E. Room Usage Report

The Room Usage Report provides statistical information about room reservations and attendance for a 12-month period. The system presents statistical information in the aggregate and by room and category. The Administrator entered the rooms and categories that appear on the report during configuration.

Report Filter

Branch Room Usage Report

Text Size: T T T

Home Reservation Maintenance Reports Setup System Settings About Logoff: Admin Level

Select a Date Range (Up to 12 months): August 2007 TO July 2008

Select Room(s):

Select All

Room 1 Room 2 Room 3

Room 4 Room 5 Room 6

Format: HTML Word Excel

Action: Display Print

[Submit](#)

Report Results

Room Usage Statistics for 8/1/2007-7/31/2008													
	Aug (2007)	Sep (2007)	Oct (2007)	Nov (2007)	Dec (2007)	Jan (2008)	Feb (2008)	Mar (2008)	Apr (2008)	May (2008)	Jun (2008)	Jul (2008)	Year Total
Total Requests	0	0	0	0	1	1	1	1	1	1	2	1	9
Total Requests By Staff	0	0	0	0	1	1	1	1	1	1	2	1	9
Total Requests By Patron	0	0	0	0	0	0	0	0	0	0	0	0	0
Total Requests By Unknown	0	0	0	0	0	0	0	0	0	0	0	0	0
Total Accepted Requests	0	0	0	0	0	0	0	0	0	0	0	1	1
Total Accepted Requests By Staff	0	0	0	0	0	0	0	0	0	0	0	1	1
Total Accepted Requests By Patron	0	0	0	0	0	0	0	0	0	0	0	0	0
Total Accepted Requests By Unknown	0	0	0	0	0	0	0	0	0	0	0	0	0
Total Estimated Attendees	0	0	0	0	0	0	0	0	0	0	0	120	120
Total Actual Attendees	0	0	0	0	0	0	0	0	0	0	0	0	0
By Room:													
Auditorium - Full													
Total Requests	0	0	0	0	0	0	0	0	0	0	0	1	1
Total Requests By Staff	0	0	0	0	0	0	0	0	0	0	0	1	1
Total Requests By Patron	0	0	0	0	0	0	0	0	0	0	0	0	0
Total Requests By Unknown	0	0	0	0	0	0	0	0	0	0	0	0	0
Total Accepted Requests	0	0	0	0	0	0	0	0	0	0	0	1	1
Total Accepted Requests By Staff	0	0	0	0	0	0	0	0	0	0	0	1	1
Total Accepted Requests By Patron	0	0	0	0	0	0	0	0	0	0	0	0	0
Total Accepted Requests By Unknown	0	0	0	0	0	0	0	0	0	0	0	0	0
Total Estimated Attendees	0	0	0	0	0	0	0	0	0	0	0	120	120
Total Actual Attendees	0	0	0	0	0	0	0	0	0	0	0	0	0
By Category:													
Boy Scouts													
Total Requests	0	0	0	0	0	0	0	0	0	0	0	1	1
Total Requests By Staff	0	0	0	0	0	0	0	0	0	0	0	1	1
Total Requests By Patron	0	0	0	0	0	0	0	0	0	0	0	0	0
Total Requests By Unknown	0	0	0	0	0	0	0	0	0	0	0	0	0
Total Accepted Requests	0	0	0	0	0	0	0	0	0	0	0	1	1
Total Accepted Requests By Staff	0	0	0	0	0	0	0	0	0	0	0	1	1
Total Accepted Requests By Patron	0	0	0	0	0	0	0	0	0	0	0	0	0
Total Accepted Requests By Unknown	0	0	0	0	0	0	0	0	0	0	0	0	0
Total Estimated Attendees	0	0	0	0	0	0	0	0	0	0	0	120	120
Total Actual Attendees	0	0	0	0	0	0	0	0	0	0	0	0	0

F. Room Usage: Reservations vs. Events

The Room Usage: Reservations v. Events appears only when both Events and Room Reserve are installed and enabled. It is a forward-looking report – current plus 11 months – that presents the total number of room reservations and event reservations. The report displays information in the aggregate and by room/location.

Report Filter

Branch
Room Usage: Reservations Vs. Events

Text Size
T T T

Home Reservation Maintenance Reports Setup System Settings About Logoff: Admin Level

Select a Date Range (Up to 12 months):
 August 2007 TO July 2008

Select Room(s)

Select All

Room 1 Room 2 Room 3
 Room 4 Room 5 Room 6

Format: HTML Word Excel

Action: Display Print

Submit

Report Results

Room Reserve vs Events Usage for 1/1/2007-7/31/2007								
	Jan	Feb	Mar	Apr	May	Jun	Jul	Total
Room Reservations	7	10	7	18	15	9	9	75
Events	5	9	13	10	18	29	11	95
By Room/Location:								
Room 1								
Room Reservations	0	1	0	0	0	0	0	1
Events	1	0	0	0	1	2	0	4
Room 2								
Room Reservations	0	1	0	0	1	1	0	3
Events	2	0	1	4	6	16	7	36
Room 3								
Room Reservations	4	4	1	2	2	2	5	20
Events	1	0	0	0	0	0	0	1

G. Room Utilization Report

The Room Utilization Report provides historical, current or future information for a 12-month period for a single room. It compares the number of minutes a room is reserved to the number of minutes available and calculates a utilization percentage. The report provides an aggregate total at the end of the report. When Events is installed and enabled, users may run the report for events only, room reservations only, or both.

Note: There is no header information indicating the type of reservation the statistics reflect. We recommend that you make the appropriate note when saving or printing the report.

Report Filter

Select a Date Range (Up to 12 months):	Month <input type="button" value="v"/> Year <input type="button" value="v"/> TO Month <input type="button" value="v"/> Year <input type="button" value="v"/>
Select Start/End Time:	<input type="radio"/> Standard Room Hours <input type="radio"/> Extended Room Hours <input checked="" type="radio"/> Selected Room Hours
	Start Time: Time <input type="button" value="v"/> End Time: Time <input type="button" value="v"/> All Day <input type="checkbox"/>
Summarize By:	<input type="radio"/> Day <input type="radio"/> Week <input checked="" type="radio"/> Month
Selected Room(s):	
<input checked="" type="checkbox"/> Select All <input type="checkbox"/> Room 1 <input type="checkbox"/> Room 2 <input type="checkbox"/> Room 3 <input type="checkbox"/> Room 4 <input type="checkbox"/> Room 5 <input type="checkbox"/> Room 6	
Reservation Type: ²	Reservation Type <input type="button" value="v"/>
Include Custom Questions:	<input checked="" type="radio"/> Yes <input type="radio"/> No
Status:	Reservation Status <input type="button" value="v"/>
Format:	<input checked="" type="radio"/> HTML <input type="radio"/> Word <input type="radio"/> Excel
Action:	<input checked="" type="radio"/> Display <input type="radio"/> Print
<input type="button" value="Submit"/>	

¹Start Time and End Time appear only when "Selected Room Hours" is checked.

²Reservation Type appears only if Room Reserve works with Events.

Report Results

Daily Summary

Room Utilization Statistics for 7/1/2007 – 7/31/2007			
Room			
Date	Usage (mins)	Availability (mins)	Utilization %
7/1/2007	0	240	0.00 %
7/2/2007	0	720	0.00 %
7/3/2007	0	720	0.00 %
7/29/2007	0	240	0.00 %
7/30/2007	0	720	0.00 %
7/31/2007	0	720	0.00 %
Totals	270	18960	1.42 %

Weekly Summary

Room Utilization Statistics for 7/1/2007-7/31/2007				
Room				
Week	Date Range	Usage (Mins)	Availability (Mins)	Utilization
27	7/1/2007 - 7/7/2007	0	4320	0.00 %
28	7/8/2007 - 7/14/2007	60	4320	1.39 %
29	7/15/2007 - 7/21/2007	0	4320	0.00 %
30	7/22/2007 - 7/28/2007	210	4320	4.86 %
31	7/29/2007 - 7/31/2007	0	1680	0.00 %
Totals		270	18960	1.42 %

Monthly Summary

Room Utilization Statistics for 5/1/2007-7/31/2007			
Room			
Month	Usage (Mins)	Availability (Mins)	Utilization %
May 2007	330	19440	1.70 %
June 2007	450	18480	2.44 %
July 2007	270	18960	1.42 %
Totals	1050	56880	1.85 %

H. Requested Bookable Equipment Report

Requested Bookable Equipment generates a list of equipment that do not include a room reservation, including a high-level overview of basic reservation information. This report is only available when equipment inventory is enabled. When displayed onscreen, the report contains a link (VIEW) to the full Reservation Form.

Report Filter

Text Size

Home Reservation Maintenance Reports Setup System Settings About Logoff: Admin Level

This Week This Month

Specific Day: Jul 17 2008

Date Range: Jul 17 2008 - Jul 17 2008

Select Equipment

<input type="checkbox"/> Select All	<input type="checkbox"/> DVD Player	<input type="checkbox"/> Laptop Computer
<input type="checkbox"/> Chairs	<input type="checkbox"/> Portable Sound System	<input type="checkbox"/> Sony Digital Video Camera
<input type="checkbox"/> LCD Projector		

Include Custom Questions: Yes No

Status: All

Format: HTML Word Excel

Action: Display Print

Order By: Equipment

Report Results

	EQUIPMENT	RESERVE DATE	STATUS	START TIME	END TIME	QTY	ORGANIZATION	CUSTOM 1
View	Media Center	Monday, July 16, 2007	Reserved	12:30 PM	2:00 PM	1	Organization 1	This column only appears if <i>Include Custom Questions</i> is set to "Yes."
View	Teleconference Phone	Monday, July 16, 2007	Reserved	10:00 AM	11:00 AM	1	Library Staff	
View	Teleconference Phone	Monday, July 16, 2007	Reserved	12:30 PM	2:00 PM	1	Organization 2	

I. View/Print Bookable Equipment Schedules

View/Print Bookable Equipment Schedules generates a schedule for equipment available without a room reservation. It is similar to Requested Bookable Equipment, but provides additional information (i.e., meeting start and end time, and description). This report is only available when equipment inventory has been enabled.

Report Filter

Text Size

Home Reservation Maintenance Reports Setup System Settings About Logoff: Admin Level

This Week This Month

Specific Day: Jul 17 2008

Date Range: Jan 1 2006 - Dec 31 2006

Select Equipment

<input type="checkbox"/> Select All	<input type="checkbox"/> DVD Player	<input type="checkbox"/> Laptop Computer
<input type="checkbox"/> Chairs	<input type="checkbox"/> Portable Sound System	<input type="checkbox"/> Sony Digital Video Camera
<input type="checkbox"/> LCD Projector		

Include Custom Questions: Yes No

Status: All

Format: HTML Word Excel

Action: Display Print

Display By: Date Equipment OR Full List Include Archived Items

Report Results

Full Display

Room ¹	Quantity	Date	START TIME	MTG START TIME	MTG END TIME	END TIME	DESCRIPTION	ORGANIZATION	STATUS	[CUSTOM QUESTION]*
White Board	1	7/16/2007	12:30 PM	12:30 PM	2:00 PM	2:00 PM	Purpose	Company 1	Reserved	
Media Center	1	7/16/2007	10:00 AM	10:00 AM	11:00 AM	11:00 AM	Purpose	Company 2	Reserved	
Teleconference Phone	1	7/16/2007	12:30 PM	12:30 PM	2:00 PM	2:00 PM	Purpose	Company 3	Reserved	

*[Custom Question] only appears when *Include Custom Question* is set to "Yes." The full question appears as the column label.

Date/Equipment Display

Date/Equipment Display: The table below illustrates the “Day” display. Equipment display provides the same information in the same format, except that the position of Equipment Name and Date information is reversed.

Monday, July 16, 2007						
Equipment	Quantity	Time	Description	Organization	Status	Custom 1*
White Board	1	Start: Meeting Start: Meeting End: End:	Purpose	Company 1	Reserved	
Tuesday, July 17, 2007						
Equipment	Quantity	Time	Description	Organization	Status	Custom 1*
Teleconference Phone	1	Start: Meeting Start: Meeting End: End:	Purpose	Company 1	Reserved	

*Custom 1 only appears when the report is displayed by date and only when *Include Custom Question* is set to “Yes.” The column label for the custom question is “Custom ##”. The system does not display the actual question or statement.

J. Bookable Equipment Usage Report

Bookable Equipment is equipment available without a room reservation. The Bookable Equipment Usage Report provides statistical information about bookable equipment reservations – the total number of requests and total number of accepted requests. The system displays information in the aggregate and by equipment for a period up to 12 months between January of the current year and December of the following year. The report does not include statistics from archived reservations. The Administrator creates the equipment inventory during configuration.

Report Filter

My Organization
Bookable Equipment Usage Report

Text Size
T T T

Home
Reservation Maintenance
Reports
System Settings
About
Logoff: Admin Level

Select a Date Range (Up to 12 months):
August 2007 TO July 2008

Select Equipment

<input checked="" type="checkbox"/> Select All	<input checked="" type="checkbox"/> CTI Main Campus - Instructor Kit # 1	<input checked="" type="checkbox"/> CTI Main Campus - Instructor Kit # 2	<input checked="" type="checkbox"/> CTI Main Campus - Portable Class Room Kit
<input checked="" type="checkbox"/> CTI Main Campus - VAPLD Dukane Presentation System	<input checked="" type="checkbox"/> Mission Trail Library - Laptop Cart	<input checked="" type="checkbox"/> My Organization - Laptop67	

Format: HTML Word Excel

Action: Display Print

Submit

Report Results

Bookable Equipment Usage Statistics for 8/1/2007-7/31/2008														
	Aug (2007)	Sep (2007)	Oct (2007)	Nov (2007)	Dec (2007)	Jan (2008)	Feb (2008)	Mar (2008)	Apr (2008)	May (2008)	Jun (2008)	Jul (2008)	Year Total	
Total Requests	1	0	0	1	0	0	0	0	1	0	0	1	4	
Total Requests By Staff	1	0	0	1	0	0	0	0	1	0	0	1	4	
Total Requests By Patron	0	0	0	0	0	0	0	0	0	0	0	0	0	
Total Requests By Unknown	0	0	0	0	0	0	0	0	0	0	0	0	0	
Total Accepted Requests	1	0	0	1	0	0	0	0	1	0	0	1	4	
Total Accepted Requests By Staff	1	0	0	1	0	0	0	0	1	0	0	1	4	
Total Accepted Requests By Patron	0	0	0	0	0	0	0	0	0	0	0	0	0	
Total Accepted Requests By Unknown	0	0	0	0	0	0	0	0	0	0	0	0	0	
By Equipment:														
CTI Main Campus - Instructor Kit # 1														
Total Requests	1	0	0	1	0	0	0	0	1	0	0	1	4	
Total Requests By Staff	1	0	0	1	0	0	0	0	1	0	0	1	4	
Total Requests By Patron	0	0	0	0	0	0	0	0	0	0	0	0	0	
Total Requests By Unknown	0	0	0	0	0	0	0	0	0	0	0	0	0	
Total Accepted Requests	1	0	0	1	0	0	0	0	1	0	0	1	4	
Total Accepted Requests By Staff	1	0	0	1	0	0	0	0	1	0	0	1	4	
Total Accepted Requests By Patron	0	0	0	0	0	0	0	0	0	0	0	0	0	
Total Accepted Requests By Unknown	0	0	0	0	0	0	0	0	0	0	0	0	0	

K. Equipment Utilization Report

The Equipment Utilization Report provides historical, current or future information for a 12-month period for a single type of equipment (i.e., chairs, flip chart, etc). It compares the number of minutes equipment is reserved to the number of minutes available and calculates a utilization percentage. The report provides an aggregate total at the end of the report. When Events is installed and enabled, the Reservation Type field provides the following options:

- All: All and Room Reservations generates the same statistical information.
- Room Reservations: See All above.
- Events: Events generates zero value results.

Note: There is no header information indicating the type of reservation the statistics reflect. We recommend that you make the appropriate note when saving or printing the report.

Report Filter

My Organization Equipment Utilization Report		Text Size T T T	
Home Reservation Maintenance Reports System Settings About Logoff: Admin Level			
Select a Date Range (Up to 12 months):	August 2007	TO	July 2008
Select Start/End Time:	<input type="radio"/> Standard Room Hours <input type="radio"/> Extended Room Hours <input checked="" type="radio"/> Selected Room Hours		
	Start Time: 12:00 AM	End Time: 12:00 AM	All Day <input type="checkbox"/>
Summarize By:	<input type="radio"/> Day <input type="radio"/> Week <input checked="" type="radio"/> Month		
Select Equipment			
<input checked="" type="radio"/> CTI Main Campus - Chairs	<input type="radio"/> CTI Main Campus - computer	<input type="radio"/> CTI Main Campus - Instructor Kit # 1	
<input type="radio"/> CTI Main Campus - Instructor Kit # 2	<input type="radio"/> CTI Main Campus - Portable Class Room Kit	<input type="radio"/> CTI Main Campus - Screen	
<input type="radio"/> CTI Main Campus - Tables	<input type="radio"/> CTI Main Campus - VAPLD Dukane Presentation System	<input type="radio"/> CTI Main Campus - White board	
<input type="radio"/> Mission Trail Library - Laptop Cart	<input type="radio"/> My Organization - Laptop67		
Reservation Type:	All		
Status:	All		
Format:	<input checked="" type="radio"/> HTML <input type="radio"/> Word <input type="radio"/> Excel		
Action:	<input checked="" type="radio"/> Display <input type="radio"/> Print		
Submit			

Report Results

Daily Summary

Equipment Utilization Statistics for 5/1/2007-7/31/2007			
Media Center (VHS, DVD, Screen)			
Day	Usage (mins)	Availability (mins)	Utilization %
5/19/2007	90	600	15.00 %
5/20/2007	60	720	8.33 %
5/21/2007	0	720	0.00 %
Totals	150	2040	7.30 %

Weekly Summary

Equipment Utilization Statistics for 5/1/2007-7/31/2007				
Media Center (VHS, DVD, Screen)				
Week	Week	Usage (mins)	Availability (mins)	Utilization %
27	7/1/2007 – 7/7/2007	90	4320	2.08 %
28	7/8/2007 – 7/14/2007	60	4320	1.39 %
29	7/15/2007 – 7/21/2007	0	4320	1.42 %
	Totals	150	12960	1.15%

Monthly Summary

Equipment Utilization Statistics for 5/1/2007-7/31/2007			
Media Center (VHS, DVD, Screen)			
Month ¹	Usage (mins)	Availability (mins)	Utilization %
May 2007	0	19440	0.00 %
June 2007	0	18480	0.00 %
July 2007	270	18960	1.42 %
Totals	270	56880	0.47 %

Section 3. Running Reports

How To Do It - Running Reports

1. Beginning at the Home Page, click on the desired report (Reports menu). The system displays the Report Filter associated with the selected report.

Reports
<ul style="list-style-type: none"> • Requested Equipment • Requested Room Setups • View/Print Room Schedules • View/Print Detailed Room Schedules • Room Usage Report • Room Usage: Reservations vs. Events • Room Utilization Report • Requested Bookable Equipment • View/Print Bookable Equipment Schedule • Bookable Equipment Usage Report • Equipment Utilization Report

2. Complete the data entry form. See the report descriptions in Section 2. The Reports (beginning on page 70) for illustrations of each report's data entry form.
3. Click SUBMIT. The system displays the selected report.
4. Click File → Print to print the report.

CHAPTER V. DATABASE MANAGEMENT

Database management refers to archiving and deleting reservations from active reservation categories.

Database management functions are performed through the Reservation Maintenance → Requests/Reservations function(s). While the information in this section refers to rooms, it applies equally to equipment when equipment inventory is enabled.

Reservation Maintenance
Rooms: <ul style="list-style-type: none"> • Requests/Reservations • In-House Reservations <ul style="list-style-type: none"> (or) ➢ Mediated Reservations ➢ Unmediated Reservations
Equipment: <ul style="list-style-type: none"> • Requests/Reservations • In-House Reservations
Patron Reservation Lookup

Section 1. Archiving Reservations

Archiving a reservation moves a reservation from the active reservation categories to the Archive. Archived reservations:

- No longer appear on the reservation calendar.
- Remain accessible to the Reports function for statistical purposes.
- Can be restored (using the Copy function) to an active reservation category.


Reservations may be archived selectively, in bulk or automatically.

A. Selective Archiving


Selective Archiving is the process of manually moving one or more selected reservations from an active reservation category to the Archive. Users can selectively archive from one active category at a time.

How To Do It — Manual Archiving

1. Beginning at the Home Page, click REQUESTS/RESERVATIONS (*Reservation Maintenance* menu). The system displays the Requests/Reservations Maintenance page.

 **Note:** If your system has two Requests/Reservations options – one for rooms, one for equipment – select the desired option. The following instructions apply equally to both options.

2. Click on the desired reservation category. The system displays the selected category.
3. Click on the Archive checkbox(es) associated with each reservation you want to archive.
4. Click the ARCHIVE button. The system archives the selected reservations without secondary confirmation. Continue working in the active reservation category or select another function from the tool bar at the top of the page.

 **Note:** There are two archive buttons: one above and one beneath the Reservations Record table.

B. Bulk Archiving

Bulk Archiving is the process of manually moving multiple reservations from an active reservation category to the Archive based upon a specified date range. Users may Bulk Archive from one or more active reservation categories at a time.

How To Do It - Bulk Archiving

Note: You can cancel and exit the Bulk Archiving process at any time by:

- (a) Clicking CANCEL when it appears, **or**
- (b) Clicking at any time to close the Bulk Archive window.

1. Beginning at the Home Page, click Requests/Reservations (*Reservation Maintenance* menu). The system displays the Requests/Reservations Maintenance page.

Note: If your system has two Requests/Reservations options – one for rooms, one for equipment – select the desired option. The following instructions apply equally to both options.

2. Click BULK ARCHIVE (located above the reservation category tabs). The system displays the Bulk Archive Tool illustrated below.

Bulk Archive			
Enter a date range			
Month <input type="text"/>	Day <input type="text"/>	Year <input type="text"/>	<input type="button" value="Pick TO"/>
Month <input type="text"/>	Day <input type="text"/>	Year <input type="text"/>	
Select which list(s) to use when archiving			
<input type="checkbox"/> Pending Request	<input type="checkbox"/> Pending Payment	<input type="checkbox"/> Accepted	
<input type="button" value="Archive"/>	<input type="button" value="Cancel"/>		

3. Complete the Bulk Archive template.
4. Click ARCHIVE. The system searches the database for reservations that match the selected criteria and displays a message showing search results.

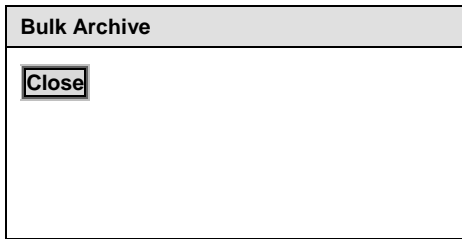
Bulk Archive (No Reservations Found)
Found 0 reservations between [dates]. <u>Enter a different Range.</u>

Continue with Step 5.

Bulk Archive (Reservations Found)
Found XX reservations between [dates]. Are you sure you want to Archive all XX reservations?
<input type="button" value="Archive XX Reservations"/> <input type="button" value="Cancel"/>

Go to Step 6.



5. If the number of reservations found equals 0, do one of the following:
 - A. To *enter a different date range*, click ENTER A DIFFERENT RANGE to display the Bulk Archive Tool and go back to Step 3.
 - B. To *exit the Bulk Archive Tool*, click in the upper right corner and continue working with the selected active reservations category or select another function from the tool bar at the top of the page.
6. If the number of reservations found is greater than 0, click ARCHIVE XX RESERVATIONS to archive the reservations. The system archives the reservations and displays the Bulk Archive Window illustrated.



7. Click CLOSE. The system closes the Bulk Archive window and returns to the Requests/Reservations Maintenance page. Continue working with the selected active reservations category or select another function from the tool bar at the top of the page.

Section 2. Deleting Reservations


A. General Principals

1. Deleting reservations permanently removes all record of the reservation from the reservation database, including all associated statistics.
 -  **Warning:** Deleted reservations are unrecoverable.
2. Reservations can be deleted from any active reservation category or the Archive, including Holidays/Closings.
3. Active reservations can be selectively deleted.
4. Archived reservations can be deleted selectively or in bulk.
5. The system does not always provide secondary confirmation before deleting a reservation.
 -  **Caution:** When the system does not provide a secondary confirmation, you do not have the opportunity to cancel or otherwise stop the system from deleting the selected reservation records.

The table below describes when the system asks for secondary confirmation and allows you to cancel the deletion process.

Type of Deletion	Secondary Confirmation?	
	Yes	No
Individual Reservations	✓	
Bulk Deletion of Reservations		✓

How To Do It — Selectively Deleting Reservations (All Reservation Categories)

1. Beginning at the Home Page, click REQUESTS/RESERVATIONS (*Reservation Maintenance* menu). The system displays the Request/Reservations Maintenance page.
 -  **Note:** If your system has two Requests/Reservations options – one for rooms, one for equipment – select the desired option. The following instructions apply equally to both options.
2. Select the desired reservation category.
3. Locate the desired reservation. Reservations contain their own set of hyperlinks located above each reservation.
4. Click DELETE. The system displays the following secondary confirmation:


“Are you sure you want to PERMANENTLY delete the reservation and all associated statistical information? This skips the archive process so there is no way to undo the delete. **OK** or **Cancel**”

5. Select one of the following:
 - A. Click OK to delete the reservation. The system deletes the reservation without secondary confirmation. Continue working with the selected active reservations category or select another function from the tool bar at the top of the page.
 - B. Click CANCEL to close the secondary confirmation without deleting the reservation. Continue working with the selected active reservations category or select another function from the tool bar at the top of the page.

How To Do It - Deleting Reservations in Bulk (Archived Reservations Only)

▼ **Caution:** The system deletes reservations without secondary confirmation when using “Delete History Information” on the Search/Filter.

1. Beginning at the Home Page, click REQUESTS/RESERVATIONS (*Reservation Maintenance* menu). The system displays the Requests/Reservations Maintenance page.

 **Note:** If your system has two Requests/Reservations options – one for rooms, one for equipment – select the desired option. The following instructions apply equally to both options.
2. Click the Archived Reservations tab. The system displays the Archived Reservations database.
3. Locate the “Delete History Information” field on the Search/Filter.
4. Enter or select an ending date. This tells the system that you want to delete all reservations prior to and including the selected date.
5. Click DELETE RESERVATIONS. The system deletes all reservations prior to and including the selected date. Continue working with Archived Reservations, select an active reservation category, or select another function from the tool bar at the top of the page.

Section 3. Copying (or Restoring) an Archived Reservation

Once a reservation is “archived” it cannot be moved from the archive back to active reservations. However, archived reservations can be copied either for use as a template for a different reservation or for purposes of “restoring” a future reservation back to active reservations. In any case, the original archived reservation remains in the Archive.

How To Do It — Copying (or Restoring) an Archived Reservation

1. Beginning at the Home Page, click REQUEST/RESERVATIONS (*Reservation Maintenance* menu). The system displays the Request Reservations Maintenance Page.
2. Click on the Archived Reservations tab.
3. Locate the desired reservation.
4. Click the COPY hyperlink located above the desired record. (Reservations contain their own set of hyperlinks located above each reservation.) The system opens a Room Request Contact Information Form.
5. Revise the form as and if desired.
6. Click the VERIFY REQUEST button located at the end of the form. The system displays a Room Request Summary page.

7. Review and verify that all information is correct.
8. Click the SUBMIT REQUEST button located at the bottom of the page to submit the reservation to the calendar. The system displays a reservation confirmation along with a message that confirms it has sent an email confirmation to the address on file.
9. Click OK to close the email confirmation message.
10. Click the appropriate button – BACK TO MAINTENANCE PAGE, NEW REQUEST OR ANOTHER REQUEST - to proceed with another function.

Section 4. Database Management and Statistical Reporting

Database management effects statistical reporting in the following ways:

- Active reservations are available to all reports.
- Archived reservations are only available to schedule-related reports.
- Deleted reservations and their associated statistics are not available to reports and cannot be recovered.

The table below outlines the available reports and the database accessible to each.

Report	Statistical Sources for Reports		
	Active	Archived	Deleted
Requested Equipment	✓		
Requested Room Setups	✓		
View/Print Room Schedules	✓	✓	
View/Print Room Detailed Schedules	✓	✓	
Room Usage Report	✓		
Room Usage: Reservations vs. Events	✓		
Room Utilization Report	✓		
Requested Bookable Equipment	✓		
View/Print Bookable Equipment Schedules	✓	✓	
Bookable Equipment Usage Report	✓		
Equipment Utilization Report	✓		

APPENDIX A. INSTALLATION AND IMPLEMENTATION GUIDE

This chapter provides detailed information about configuring Room Reserve to work with your library system. The functions in this chapter require Administrator level access.

This configuration information applies to both single and multi-branch systems. Special notes relating to single and multi-branch systems are located throughout this chapter and flagged as follows:

- Single Branch System Notes:
- Multi-Branch System Notes

Section 1. System Requirements

Item	Minimum Requirement
Server Platform – Microsoft:.....	2000 Server, Advanced Server*, or 2003 Server or higher recommended.
Disk Space:	50-100MB free disk space, preferably on the drive where the wwwroot directory resides.
Internet Information Services:	Microsoft IIS installed and running
Patron Access through Internet.....	Port 80 must be accessible through the library's server firewall to grant patrons access from their home computers.
Security:	Strongly Recommended: All Microsoft security updates, patches and fixes installed.

Section 2. Installation Options

Because Room Reserve has little impact on system resources and performance, libraries have some flexibility in their installation options, including installation on a new or spare library server, or hosted on an off-site server.

▼ Caution: We do not recommend installing Room Reserve on the same server with your website.

A. Library Server

Installing Room Reserve on the library's server does not require a reboot of the system. The library's main server is the most common library server installation, but Room Reserve may be installed on any server matching the requirements described in System Requirements above. Firewall security is the primary consideration. Port 80 (web service port (http)) must be accessible through the firewall to accommodate patron access through the internet (i.e., from their home computer).

Application	Installation
Room Reserve	A subfolder of the wwwroot folder.
MYSQL database	The root directory of the hard drive, typically a secondary drive partition – not the c:/drive recommended.
Patron Access	Port 80 (web service port (http)) accessible through the firewall.

B. Hosted Server

Evanced has the ability to host Room Reserve or will work with a library's existing internet service provider to determine whether they are able and willing to provide hosting services and at what cost.

Section 3. Library Policy Consideration

Room Reserve has several features the library can activate or deactivate depending upon their policies. Most of these features are configured in Settings.

Section 4. Security

Room Reserve uses a system of passwords that allows libraries to restrict access to certain features and functions. The table below outlines the available password levels and their associated functions.

Security Level	Add	Edit	Delete	Read	Accept/Deny Pending Reservations ⁵	System Configuration
Read Only	√ ³			√		
Create Only	√ ⁴			√	√ ⁵	
Staff ¹	√	√	√	√	√ ⁵	
Administration ²	√	√	√	√	√	√

¹Staff Level: Staff level users have access to all menus except Setup and Settings. Depending on the security level of the password (i.e., Read Only and Create), some reservation functions may require the approval of someone with higher security access.

²Administrator Level: The Administrator has full access to all menus, including configuration settings and settings that impact all branches in a multi-branch library system.

³Read Only Level: The ability of the Read Only level to add a reservation is the same as that granted to patrons. If patrons are limited to submitting reservations no earlier than 3 days prior to a reservation, then Read Only is also limited to adding reservations no more than 3 days before an event.

⁴Create Only Level: The Create Only level has intermediate privileges to add reservations. Any limits on advance reservations do not apply.

⁵Accept/Deny Reservations: Create Level is the minimum level available for accepting and denying reservations. The Administrator sets the Approval Password Level field in System Settings → General → Approval Password Level.

Section 5. Implementation Recommendations

The following are our recommendations for ensuring a successful and effective installation. Please feel free to contact us with any questions.

- A. Assign a lead person to your project team. This person should have the knowledge and authority to discuss the project with Evanced, make decisions and resolve issues, including those related to features and policy decisions. This person will act as the main contact with Evanced.
- B. Assess incompatibility issues between the system and organizational policies and procedures.
- C. Create an implementation schedule. This will vary from library to library, but will typically involve the following key steps:
 - (i) Installation and configuration
 - (ii) Key staff training (usually Evanced facilitated training)
 - (iii) Pre-pilot trials, limited data entry, configuration adjustments

- (iv) Full staff training (usually library conducted training of its staff)
- (v) Full staff pilot and data entry (enter library room and equipment inventory, current reservations on file, etc)
- (vi) Public launch and promotion
- (vii) Determine policies and procedures for managing updates

Our website (www.evancedsolutions.com) contains Manuals, Quick Start Implementation Guides, Templates and Marketing Tools to assist you.

Section 6. Backup Recommendations

Regular system backups are very important to maintaining the integrity of your system. We recommend the following schedule:

<u>File</u>	<u>Backup</u>
[drive]:\mysql\data\autoemail	Nightly
Web file	Web file data should be backed-up regularly to prevent data loss. Back-ups should be performed consistent with your library's policy.

Section 7. Technical Support

Please contact the following for assistance:

Phone	888-519-5770
Email	support@evancedsolutions.com
Web	http://www.evancedsolutions.com, and http://evanced.blogspot.com

APPENDIX B. SYSTEM CONFIGURATION

Section 1. Multi-Branch Library Systems

Multi-branch library systems should begin configuration in All Branches mode and then adjust each branch as needed. Once adjustments are made at the individual branch level, some settings cannot be reset in All Branches mode; they must be reset at the individual branch level. All Branches is an Administrator level function.

The table below describes where to find configuration settings. Settings that appear in both the individual branch and All Branches mode contain different options and must be configured at both levels.

Configuration Setting	All Branches	Individual Branch
Style Configuration	✓	✓
Library Information	✓	✓
Regional Settings	✓	
System Messages		✓
Room System Templates		✓
Equipment System Templates		✓
Room Email Templates		✓
Equipment Email Templates		✓
Email Server Settings	✓	
Email Settings		✓
Security	✓	✓
System Settings		✓
Branch Specific Lists		✓

Section 2. Configuring the System

System configuration begins from the *Settings: System Configuration & Settings* menu.

 Multi-Branch Libraries: Review *Section 1. - Multi-Branch Library Systems* above before continuing.

A. Appearance (Style Configuration)

Libraries may customize the look and feel of Room Reserve consistent with their web page style. This affects the appearance of titles, backgrounds, calendars, buttons, hyperlinks and more.

You may operate two windows to better preview your choices: one displaying the Style Configuration Maintenance page (*Settings* → *System Configuration & Settings*) and one displaying the Room Request page (*Reservation Maintenance* → [] *Reservations*). Refresh the Room Request page to see your changes.

New to Version 6:

- *Applying styles from other Evanced programs*: Room Reserve now allows you to apply style configurations from Events to Room Reserve using the LOAD EVENTS button. In a multi-branch library system, this feature exists in both the All Branches and individual branch modes.

- **Restoring Factory Default Settings:** You may restore style settings to their factory default by clicking the LOAD FACTORY DEFAULTS button. The system will display a confirmation message - "Loading Factory Defaults will erase changes you have made" - allowing you to confirm or abort the process. In a multi-branch library system, this feature exists in both the All Branches and individual branch modes.
- **Clear Settings:** This feature appears in a multi-branch library system only. When individual branches customize their style settings, they break the connection that allows global style changes to *All Branches*. Any subsequent global changes made in All Branches mode will not impact any branch that customized their style settings locally. The CLEAR SETTINGS button re-establishes the link between *All Branches* and the individual branches to allow global changes.
- **Load 'All Branches':** This feature appears in a multi-branch library system only. LOAD 'ALL BRANCHES' allows an individual branch that customized its own styles locally to apply the global All Branches style settings to their branch. Unlike *Clear Settings*, it does not re-establish the link between All Branches and the individual branch.
- **Entry Form Title Preview** allows you to preview style settings for room request pages.

How To Do It - Style Configuration

1. Beginning at the Home Page, click on SYSTEM CONFIGURATION & SETTINGS (Settings Menu). The system loads the Style Configuration Maintenance page.
2. Style options are collapsed under the property heading (i.e., General Display Properties). To expand the list of options, click on the desired topic heading.
3. Select font options using the drop down menu.
4. Use one of the options below to make color selections. Your selections appear in preview on the right side of the page.
 - A. Select PICK to display the available color palette and click the desired color. Selecting a color closes the PICK window.
 - B. Enter the HTML code (i.e., #FF090) for the desired color.
5. Click SAVE at the end of each category.
6. Click BACK on the menu to return to the Home Page.

B. Library Information

Library Information refers to the library's contact information (i.e., name, address, phone, etc.), residency (or other) terms, and hours (standard and alternate). *This information must be entered before reservations are posted to the calendar.*

New for Version 6.0

- At the All Branches level, Library Information is managed from a drop list.

Add Branch	Add Branch allows you to set up a new library branch in the system. Libraries might also use this function to create a private, internal only staff calendar. <i>Note:</i> In order for Add Branch to be active, the <i>Enable Multi-Branch</i> setting in System Settings must be set to "Yes". You can no longer set the total number of branches from System Settings.
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Edit Branch	Edit Branch allows you to view and edit the configuration of existing branches, adjust the order in which branches appear in drop down lists, and delete individual branches.
Master Branch	Master Branch is the Library Name and website address only.

- When adding or editing a branch, the Library Information Maintenance page includes fields to add a map link. While this feature appears in Room Reserve, it applies only to the Events module.
- When adding or editing a branch, you may elect to make the branch private – hidden from public view. This allows libraries to create an internal-only staff calendar.

Multi-Branch System Note: Library Information is split between All Branches and individual branch modes as follows:

Mode	Information
All Branches	<ul style="list-style-type: none"> • Add Branch • Edit • Master Branch
Individual Branch	<ul style="list-style-type: none"> • Edit their own branch only.

How To Do It - Master Branch

Note: You must log into the system with an *Administrator* level password.

Multi-Branch System Note: This is an *All Branches* function. Be sure the branch drop list in the upper right corner of the page shows *All Branches*.

1. Click SYSTEM CONFIGURATION & SETTINGS (*Settings menu*) on the Home Page. The system loads the Style Configuration Maintenance page.
2. Hover over LIBRARY INFORMATION on the menu and click EDIT MASTER from the drop down list. The system displays the Library Information Maintenance page.
3. Enter the information requested. Items marked with an asterisk (*) are required.
4. Click SAVE.
5. Click BACK to return to the Home Page.

How To Do It - Add a Branch

Note: You must log into the system with an *Administrator* level password.

Multi-Branch System Note: This is an *All Branches* function. Be sure the branch drop list in the upper right corner of the page shows *All Branches*.

1. Click SYSTEM CONFIGURATION & SETTINGS (*Settings menu*) on the Home Page. The system loads the Style Configuration Maintenance page.
2. Hover over LIBRARY INFORMATION on the menu and click ADD BRANCH from the drop down list. The system displays the Library Information Maintenance page for branch settings.

Note: If you don't see ADD BRANCH on the list, you must go to System Settings and set the *Enable Multi-Branch* field to "Yes".


3. Enter the information requested. Items marked with an asterisk (*) are required.

Note: To hide a branch from public view, be sure to click the PRIVATE checkbox.

4. Click SAVE. The system saves the branch and displays a blank Library Information template to add an additional branch, if desired.
5. Click BACK to return to the Home Page.


How To Do It - Creating a Staff or In-House Only Calendar



Use the Private Branch feature to create a staff or in-house calendar. Private branches are not accessible to public view.

 **Single Branch Libraries:** Single branch libraries must enable the multi-branch feature to create a staff calendar. Go to SYSTEM SETTINGS (From the Home Page, go to *Settings* → *System Configuration & Settings*) and set *Enable Multi-Branch* field to “Yes”.

1. Click SYSTEM CONFIGURATION & SETTINGS on the home page (*Settings menu*). The system loads the Style Configuration Maintenance page.
2. Hover over LIBRARY INFORMATION on the menu and click ADD BRANCH from the drop down list. The system displays the Library Information Maintenance page – branch settings template.
3. Enter the information requested. Items marked with an asterisk (*) are required.
 - A. Click the PRIVATE checkbox to make the calendar private and accessible to staff only.
4. Click SAVE. The system saves the branch and displays a blank Library Information template to add an additional branch, if desired.
5. Click BACK to return to the Home Page.

How To Do It - Edit Branch


 **Note:** You must log into the system with an *Administrator* level password.

  **Multi-Branch System Note:** This is an *All Branches* function. Be sure the branch drop list in the upper right corner of the page shows *All Branches*.

1. Click SYSTEM CONFIGURATION & SETTINGS (*Settings menu*) on the home page. The system loads the Style Configuration Maintenance page.
2. Hover over LIBRARY INFORMATION on the menu and click EDIT BRANCH from the drop down list. The system displays the Library Information Maintenance page – branch listing.
3. Click on the desired branch to open. The system opens the branch template, which allows you to enter the library’s contact information, location mapping and hours.
4. Enter the information requested. Items marked with an asterisk (*) are required.
5. Click SAVE. The system returns to the branch listing.
6. **Display Order:** Click the UP/DOWN button(s) in the Display Order column to change a branch’s position in the list.
7. Click BACK to return to the Home Page.

How To Do It - Deleting a Branch

Room Reserve allows you to delete library branches from the system without first clearing any data associated with the branch. You must log into the system with an *Administrator* level password.

 **Warning:** Deleting a branch permanently deletes all information associated with that branch, including all events, rooms, reservations, registrations, attendance and all related statistics. If you have both Events and Room Reserve, any action taken in Room Reserve affects Events.

This includes, but is not limited to, published, unpublished and archived information. **Deleted information is unrecoverable.**

Multi-Branch System Note: This is an *All Branches* function. Be sure the branch drop list in the upper right corner of the Home Page shows *All Branches*.

1. Click SYSTEM CONFIGURATION & SETTINGS (*Settings menu*) on the Home Page. The system loads the Style Configuration Maintenance page.
2. Hover over LIBRARY INFORMATION on the menu and click EDIT BRANCH from the drop down list.
3. Click the DELETE button associated with the desired branch.
4. The system displays the following message:

“Are you sure you want to delete this branch? This will delete the branch and all associated information including events, rooms and reservations!”

Click OK to delete the branch or CANCEL to abort the process.

5. When you select OK, the system displays a secondary confirmation message:

“The branch and all associated information will be deleted permanently! Are you sure?”

Click OK to delete the branch or CANCEL to abort the process.

6. When you click OK, the system deletes the branch without further confirmation.
7. Click BACK to return to the Home Page.

C. System Messages

System Messages are messages that appear on the Reservation Form and Summary page. The table below illustrates the template used to create System Messages. Libraries may use the default templates provided or customize their own messages. The form supports HTML codes.

Multi-Branch Library System Note: System Messages is a Branch Specific feature.

Field	Defaults	Notes/Description
Library Card Note:	“An adult cardholder (18 years or older) may reserve the meeting room. The card holder making the reservation will be held liable for any damage done to the room (See the Meeting Room Policy).”	“Information entered here appears on the Contact Entry page, just below the library card number entry.”
Payment Information:	<p>“You will need to pay the following within 1 week from today or your request will not be approved:</p> <ul style="list-style-type: none"> <ul type="square"> ^STARTDEPOSIT^One check for the Deposit in the amount of \$^DEPOSIT AMOUNT^^ENDDEPOSIT^ ^STARTFEE^One check for the Fee in the amount of \$^FEEAMOUNT^^ENDFEE^ ^STARTFEEANDDEPOSIT^ NOTE: Please use separate checks for the deposit and fee amounts. ^ENDFEEANDDEPOSIT^ <p>You can pay in person at the circulation desk or send your payment to:”</p>	“Information entered here appears in the Send Payment section of room reservations that require payment.”

Field	Defaults	Notes/Description
Fixed Reservation Message:	Empty	"Information entered here appears at the bottom of both the Contact Entry and Summary pages for ALL room reservations. Disclaimer information can be entered, such as 'It is understood that by completing the reservation you have reviewed and understand the room policy.'"
Reservation Summary Message	"Review Info and Submit to Finish"	"Information entered here will appear at the bottom of both the Contact Entry and the Summary Request Pages for ALL room reservations. Disclaimer information can be entered such as "It is understood that by completing the reservation you have reviewed and understand the room policy.""
<input type="button" value="Save"/>		

How To Do It - Configuring System Messages

Multi-Branch Library System Note: Multi-branch library systems begin by selecting a branch from the Branch Selector list.

1. Multi-branch libraries select a branch from the Branch Selector list on the Home Page. Single branch libraries proceed to the next step.
2. Beginning at the Home Page, click SYSTEM CONFIGURATION AND SETTINGS (*Settings* menu). The system displays the Style Configuration Maintenance page.
3. Click SYSTEM MESSAGES on the menu. The system displays the System Messages Maintenance page.
4. Revise the system messages as desired. The template supports HTML codes.
5. Click SAVE to save your changes.
6. Click BACK on the Configuration menu to return to the Home Page.

D. System Templates

System Templates create the confirmation messages displayed when users submit a reservation. The System Templates do not generate e-mail confirmations. See Section 2.E. - E-mail Templates for more information about e-mail confirmations.

Room Templates

The number of templates that appear depends on the configuration of the system. Room Reserve categorizes rooms as either *Mediated* or *Unmediated*. By default, all rooms are *Mediated* unless the system is configured otherwise. See Section 2.H. - System Settings for more information (Field: "Enable Unmediated Booking Options").

- *Mediated* rooms require secondary approval from a staff person with the appropriate security privileges – Staff or Administrator login. How the system manages Mediated reservations depends on who submits them. When submitted by patrons, Mediated reservations are classified as Pending until approved by library staff. When submitted by staff, reservations are automatically accepted.
- *Unmediated* rooms do not require staff approval and the system automatically accepts a reservation regardless of the source – patron or staff. The table below lists the available templates and under which configuration they appear.

Template	In-House Reservation ¹	Mediated/Unmediated Reservation
Patron Request		✓ ²
Patron Reservation	✓	✓ ³
Staff Request Submitted	✓	✓

¹This is the standard configuration.

²Mediated Rooms only.

³Unmediated Rooms only.

Libraries may use the default templates provided or customize their own messages.

1. **Patron Request:** The system uses the Patron Request template to display a confirmation for a patron-submitted reservation for a *Mediated* room. The system also e-mails a confirmation to the patron e-mail address listed on the Reservation Form.
2. **Patron Reservation:** The system uses the Patron Reservation template to display a confirmation for a patron-submitted reservation for an *Unmediated* room. The system also e-mails a confirmation to the e-mail address listed on the Reservation Form. By default, this template is hidden until “Enable Unmediated Booking Options” is enabled in System Settings. The full path to this field from the Home Page is Settings Menu → System Configuration & Settings → System Settings → General. The field is in the Request Settings section of the template.
3. **Staff Request Submitted:** The system uses the Staff Request Submitted template to display a confirmation for a staff-submitted reservation regardless of its Mediated or Unmediated status. The system also e-mails a confirmation to the e-mail address listed on the Reservation Form.


Equipment Templates

Equipment System Templates only appears on the menu when equipment inventory has been enabled. The full path to this field from the Home Page is Settings Menu → System Configuration & Settings → System Settings → General. The “Enable Equipment Inventory” field is in the Request Settings section of the template. Equipment reservations are always Mediated.

1. **Patron Request:** The system uses the Patron Request template to display a confirmation for a patron-submitted reservation. The system also e-mails a confirmation (using E-mail Templates) to the e-mail address listed on the Reservation Form.
2. **Staff Request Submitted:** The system uses the Staff Request Submitted template to display a confirmation for a staff-submitted reservation. The system also e-mails a confirmation to the e-mail address listed on the Reservation Form.

How To Do It - Configuring System Templates

Use the instructions in this section to customize the system templates. No further configuration is necessary to use the default templates. The following instructions apply regardless of the type of system template (Room or Equipment) configured.

 **Multi-Branch Library System Note:** System Templates are branch specific. Libraries can apply to all branches templates customized at the branch level. Each branch retains the ability to customize their templates without affecting the other branches.

1. Beginning at the Home Page, click on SYSTEM CONFIGURATION AND SETTINGS (*Settings* menu). The system displays the Style Configuration Maintenance page.
2. Click the desired system template option on the menu to reveal a list of templates.
3. Click CLEAR to erase the default template and create your own confirmation or edit the default text as desired.

4. Insert the tags that pull in reservation detail:
 - A. Click the location in the message where the tag should appear.
 - B. Click the desired tag in the Tag Window. The tag should appear in the selected location.
 - C. Repeat to insert remaining tags.
5. Finalize the template by selecting one of the following:
 - A. Save to the current branch only by clicking **SAVE**.
 - B. Save and apply to all branches (multi-branch system) by clicking **SAVE AND APPLY TO ALL BRANCHES**.
 - C. Restore the default template by clicking **LOAD DEFAULT TEMPLATE**.
6. Click **BACK** on the Configuration menu to return to the Home Page.


E. E-mail Templates

E-mail Templates are the basis for the automatic e-mail messages triggered when a reservation is submitted. Room Reserve categorizes email templates by function – Room Email Templates and Equipment Email Templates. Unless otherwise indicated the templates described below appear in and function the same in both categories.

1. Patron Request Confirmation: The Patron Request Confirmation template creates a confirmation for a patron's submission of a Mediated room reservation. See Section 2.D. – System Templates: Room Templates for more information about Mediated and Unmediated rooms.
2. Patron Reservation: The Patron Reservation template only appears when the *Enable Unmediated Booking Options* is enabled in System Settings. It creates a confirmation for a patron's submission of an *Unmediated* room reservation. This template does not apply to Equipment Email Templates because all equipment reservations are Mediated. See Section 2.D. – System Templates: Room Templates for more information about Mediated and Unmediated rooms.
3. Staff Request Confirmation: The Staff Request Confirmation template creates a confirmation for staff-submitted reservations. The system automatically accepts all staff submitted reservations.
4. Request Accepted: The Request Accepted template creates the approval confirmation for a *Pending* reservation. This confirmation may include deposit or payment instructions.
5. Request Denied: The Request Denied template creates the message that notifies a patron that their request has been denied and why.
6. Payment Received: The Payment Received template creates a receipt of payment confirmation. This acknowledgement reclassifies a reservation from *Pending Payment* to *Accepted*.
7. Reservation Reminder: The system uses the Reservation Reminder template to create a reservation reminder that is sent to the e-mail address listed on the Reservation Form. The system sends the reminder a fixed number of days prior to a reservation, as determined by the E-mail Settings configuration.

How To Do It - Customizing E-mail Templates

Use the instructions in this section to customize the E-mail Templates. No further configuration is necessary to use the default templates.

-  **Multi-Branch Library System Note:** E-mail Templates are branch specific, but Administrators can apply the templates to all branches. When applied to all branches, each branch retains the ability to customize their templates without affecting the other branches.

1. Beginning at the Home Page, click SYSTEM CONFIGURATION AND SETTINGS (*Settings* menu). The system displays the Style Configuration Maintenance page.
2. Click either ROOM E-MAIL TEMPLATES or EQUIPMENT EMAIL TEMPLATES on the menu to display a list of available templates.
3. Click on the desired template. The system loads the selected template.
4. Revise the template as desired or click CLEAR to erase the template's default message.
5. Insert the tags that pull in reservation detail:
 - A. Click the location in the message where the tag should appear.
 - B. Click the desired tag in the Tag Window. The tag should appear in the selected location
 - C. Repeat until all tags have been inserted.
6. Finalize the template by selecting one of the following:
 - A. Save to the current branch only by clicking SAVE.
 - B. Save and apply to all branches (multi-branch system) by clicking SAVE AND APPLY TO ALL BRANCHES.
 - C. Restore the default template by clicking LOAD DEFAULT TEMPLATE.
7. Click BACK on the Configuration menu to return to the Home Page.

F. Email Settings (and Email Server Settings)

E-mail Settings sets the e-mail addresses used to route confirmations and status change e-mails internally and externally.

Single Branch Systems will find these settings listed under *E-mail Settings*.

Multi-Branch Library Systems will find these settings split between *E-mail Settings* and *E-mail Server Settings*. The table below outlines the branch designation and configuration location for each piece of the E-mail configuration puzzle.

	Branch Assignment		Configuration Assignment	
	Individual Branch	All Branches	Email Settings	Email Server Settings
Confirmation/Status Change	✓		✓	
Email Server Settings		✓		✓
Upcoming Event/Reminder Settings		✓		✓

The following table describes the e-mail settings.

Field	Options	Notes and Description
Confirmation/Status Change:		
"From" Name:	[Text entry field.]	The From Name appears on outgoing confirmations and status change e-mails.
"From" E-mail Address:	[Text entry field]	The "From" address is associated with the From Name and appears on outgoing confirmations and status change e-mails.

<u>Field</u>	<u>Options</u>	<u>Notes and Description</u>
Default "To" Internal Name:	[Text entry field]	The name of the internal contact that receives status change messages.
Default "To" Internal E-mail Address(es):	[Text entry field]	The e-mail address associated with "Default To Internal Name". Separate multiple email addresses by semi-colon (;).
Email Server Settings:		
SMTP Address (URL or IP):	[Text entry field]	An SMTP address is required for Windows servers.
Authentication Type:	No Authentication <input type="radio"/> Basic Authentication <input type="radio"/> NTLM <input type="radio"/>	Default: No Authentication. "NTLM" stands for Windows NT LAN Manager.
User Name:	[Text entry field]	Required if using basic authentication.
User Password:	[Text entry field]	Required if using basic authentication.
Upcoming Event/Reminder Settings:		
Event Notification Offset	<input type="text" value="Numerical List"/> Day(s)	This field only appears when Events and Room Reserve work together. Enter 0 to disable notifications. The default is 30 days.
Event Reminder Offset	<input type="text" value="Numerical List"/> Day(s)	This field only appears when Events and Room Reserve work together. Enter 0 to disable event reminders. The default is 2 days.
Room Reminder Offset:	<input type="text" value="Numerical List"/> Day(s)	Enter 0 to disable reservation reminders. The default is 2 days.
Web Server URL or IP	[http://]	Web Server URL or IP refers to the web address of the server housing the system. Include <i>http://</i> when entering the web address.
Folder Path:	[Text entry field]	Folder Path refers to the system folder path from the Web Server URL or IP entered above. Do not include starting and ending forward slashes (i.e., evanced/lib).
"From" Name:	[Text entry field]	The From Name appears on outgoing e-mail messages relating to upcoming event and room reminders.
"From" Email Address	[Text entry field]	The "From" address is associated with the From Name and appears on outgoing upcoming event and reservation reminder e-mails.
Nightly Status "To" Email Name	[Text entry field]	The name of the recipient of nightly status change e-mails. The name entered here can be the same name entered in the "From Name" field above.
Nightly Status "To" Email Address:	[Text entry field]	The e-mail address associated with the "Nightly Status To Email Name" above. The e-mail address can be the same e-mail address entered into "From Email Address" above.

<u>Field</u>	<u>Options</u>	<u>Notes and Description</u>
E-mail Sending Option:	Individual E-mails <input type="radio"/> Condensed E-mails <input type="radio"/>	E-mail sending options determines how an individual registered for multiple reminders or notifications receives them – all reminders sent as individual emails (4 reminders = 4 emails) or all reminders condensed into one e-mail (4 reminders = 1 email). The default is Individual Emails.
Enable Logging:	No <input type="radio"/> Yes <input checked="" type="radio"/>	When Enable Logging is set to “Yes”, the system displays a progress log of email reminder and notification messages. Notify.bat file must be configured for nightly delivery of event notifications and reminders. See <i>Section G. Scheduling Automatic E-mail – The notify.bat File</i> on page B-15. Default: Yes.
<input type="button" value="Save"/> <input type="button" value="Send Test/Confirmation/Status Change E-mail"/>		<p>Saves changes to the current branch only.</p> <p>Sends a test confirmation to the address entered in the “Default “To” Internal E-mail Address(es)” field.</p>

How To Do It - Multi-Branch Library Systems

1. Email Server Settings (All Branches):
 - A. Beginning at the Home Page, select All Branches from the Branch Selector.
 - B. Click SYSTEM CONFIGURATION AND SETTINGS (*Settings* menu). The system displays the Style Configuration Maintenance page.
 - C. Click EMAIL SERVER SETTINGS on the menu. The system displays the Email Server Settings template.
 - D. Complete the template.

<u>Field</u>	<u>Options</u>	<u>Notes and Description</u>
SMTP Address (URL or IP):	[Text entry field]	An SMTP address is required for Windows servers.
Authentication Type:	No Authentication <input type="radio"/> Basic Authentication <input type="radio"/> NTLM <input type="radio"/>	Default: No Authentication. “NTLM” stands for Windows NT LAN Manager.
User Name:	[Text entry field]	Required for Basic Authentication.
User Password:	[Text entry field]	Required for Basic Authentication.
Upcoming Event/Reminder Settings:		
Event Notification Offset	<input type="text" value="Numerical List"/> Day(s)	This field only appears when Events is installed and enabled. Enter 0 to disable notifications. The default is 30 days.
Event Reminder Offset	<input type="text" value="Numerical List"/> Day(s)	This field only appears when Events is installed and enabled. Enter 0 to disable event reminders. The default is 2 days.
Room Reminder Offset:	<input type="text" value="Numerical List"/> Day(s)	Enter 0 to disable reservation reminders. The default is 2 days.

<u>Field</u>	<u>Options</u>	<u>Notes and Description</u>
Web Server URL or IP	http://	Web Server URL or IP refers to the web address of the server housing the system. Include <i>http://</i> when entering the web address.
Folder Path:	[Text entry field]	Folder Path refers to the system folder path from the Web Server URL or IP entered above. Do not include starting and ending forward slashes (i.e., evanced/lib).
"From" Name:	[Text entry field]	The From Name appears on upcoming Room Email reminders.
"From" Email Address	[Text entry field]	The "From" address is associated with the From Name and appears on outgoing upcoming event and reservation reminder e-mails.
Nightly Status "To" Email Name	[Text entry field]	The name of the recipient of nightly status change e-mails. The name entered here can be the same name entered in the "From Name" field above. See <i>Section G. Scheduling Automatic E-mail – The notify.bat File</i> on page B-15.
Nightly Status "To" Email Address:	[Text entry field]	The e-mail address associated with the "Nightly Status To Email Name" above. The e-mail address can be the same e-mail address entered into "From Email Address" above. See <i>Section G. Scheduling Automatic E-mail – The notify.bat File</i> on page B-15.
E-mail Sending Option:	Individual E-mails <input type="radio"/> Condensed E-mails <input type="radio"/>	E-mail sending options determines how an individual registered for multiple reminders or notifications receives them – all reminders sent as individual emails (4 reminders = 4 emails) or all reminders condensed into one e-mail (4 reminders = 1 email). The default is Individual E-mails.
Enable Logging:	No <input type="radio"/> Yes <input type="radio"/>	When Enable Logging is set to "Yes", the system displays a progress log of email reminder and notification messages. Notify.bat file must be configured for nightly delivery of event notifications and reminders. See <i>Section G. Scheduling Automatic E-mail – The notify.bat File</i> on page B-15. Default: Yes.
		Saves changes to the current branch.

- E. Click SAVE.
- F. Click BACK on the Configuration menu to return to the Home Page.

Note: The next step sets the branch settings and must begin from the Home Page.

2. Email Setting (Branch Specific):
 - A. Beginning at the Home Page, select an individual branch from the Branch Selector.
 - B. Click SYSTEM CONFIGURATION AND SETTINGS (*Settings* menu). The system displays the Style Configuration Maintenance page.

- C. Click EMAIL SETTINGS on the menu. The system displays the Confirmation/Status Change template.
- D. Enter the requested information.

<u>Field</u>	<u>Options</u>	<u>Notes and Description</u>
Confirmation/Status Change:		
"From" Name:	[Text entry field.]	The From Name appears on outgoing confirmations and status change e-mails.
"From" E-mail Address:	[Text entry field]	The "From" address is associated with the From Name and appears on outgoing confirmations and status change e-mails.
Default "To" Internal Name:	[Text entry field]	The name of the internal contact that receives status change messages.
Default "To" Internal E-mail Address(es):	[Text entry field]	The e-mail address associated with "Default To Internal Name". Separate multiple email addresses by semi-colon (;).
<input type="button" value="Save"/> ¹ <input type="button" value="Save and Apply to All Branches"/> ²		
<input type="button" value="Send Test Confirmation/Status Change E-mail"/> ³		

- 3. Finalize the template by selecting one of the following:
 - A. To save to the current branch only, click SAVE.
 - B. To save to all branches, click SAVE AND APPLY TO ALL BRANCHES
 - C. To send a test message, click SEND TEST CONFIRMATION/STATUS CHANGE EMAIL.
- 4. Click BACK on the Configuration menu to return to the Home Page.

How To Do It - Single Branch Library

- 1. Beginning at the Home Page, click on SYSTEM CONFIGURATION AND SETTINGS (*Settings* menu). The system displays the Style Configuration Maintenance page.
- 2. Click EMAIL SETTINGS on the menu. The system displays the Email Settings template illustrated below.
- 3. Complete the template as needed.

<u>Field</u>	<u>Options</u>	<u>Notes and Description</u>
Confirmation/Status Change:		
"From" Name:	[Text entry field.]	The From Name appears on outgoing confirmations and status change e-mails.
"From" E-mail Address:	[Text entry field]	The "From" address is associated with the From Name and appears on outgoing confirmations and status change e-mails.

¹ Saves changes made to the template. In a multi-branch library system, changes are applied to the current branch only.
² Appears in multi-branch library systems only. Saves and applies the template to all branches.
³ Sends a test confirmation to the address entered in the "Default "To" Internal E-mail Address(es)" field.

<u>Field</u>	<u>Options</u>	<u>Notes and Description</u>
Default "To" Internal Name:	[Text entry field]	The name of the internal contact that receives status change messages.
Default "To" Internal E-mail Address(es):	[Text entry field]	The e-mail address associated with "Default To Internal Name". Separate multiple email addresses by semi-colon (;).
Email Server Settings:		
SMTP Address (URL or IP):	[Text entry field]	An SMTP address is required for Windows servers.
Authentication Type:	No Authentication <input type="radio"/> Basic Authentication <input type="radio"/> NTLM <input type="radio"/>	Default: No Authentication. "NTLM" stands for Windows NT LAN Manager.
User Name:	[Text entry field]	Required for Basic Authentication.
User Password:	[Text entry field]	Required for Basic Authentication.
Upcoming Event/Reminder Settings:		
Event Notification Offset	<input type="text" value="Numerical List"/> Day(s)	This field only appears when Events is installed and enabled. Enter 0 to disable notifications. The default is 30 days.
Event Reminder Offset	<input type="text" value="Numerical List"/> Day(s)	This field only appears when Events is installed and enabled. Enter 0 to disable event reminders. The default is 2 days.
Room Reminder Offset:	<input type="text" value="Numerical List"/> Day(s)	Enter 0 to disable reservation reminders. The default is 2 days.
Web Server URL or IP	http://	Web Server URL or IP refers to the web address of the server housing the system. Include <i>http://</i> when entering the web address.
Folder Path:	[Text entry field]	Folder Path refers to the system folder path from the Web Server URL or IP entered above. Do not include starting and ending forward slashes (i.e., evanced/lib).
"From" Name:	[Text entry field]	The From Name appears on outgoing e-mail messages relating to upcoming event and reservation reminders.
"From" Email Address	[Text entry field]	The "From" address is associated with the From Name and appears on outgoing reservation reminder and upcoming event e-mails.
Nightly Status "To" Email Name	[Text entry field]	The name of the recipient of nightly status change e-mails. The name entered here can be the same name entered in the "From Name" field above.
Nightly Status "To" Email Address:	[Text entry field]	The e-mail address associated with the "Nightly Status To Email Name" above. The e-mail address can be the same e-mail address entered into "From Email Address" above.

<u>Field</u>	<u>Options</u>	<u>Notes and Description</u>
E-mail Sending Option:	Individual E-mails <input type="radio"/> Condensed E-mails <input type="radio"/>	E-mail sending options determines how an individual registered for multiple reminders or notifications receives them – all reminders sent as individual emails (4 reminders = 4 emails) or all reminders condensed into one e-mail (4 reminders = 1 email). The default is Individual e-mails.
Enable Logging:	No <input type="radio"/> Yes <input type="radio"/>	Enable logging determines whether the system displays an email progress log for reminder and notification messages. The notify.bat file must be configured for nightly delivery of event notifications and reminders. See <i>Section G. Scheduling Automatic E-mail – The notify.bat File</i> on page B-15.
<input type="button" value="Save"/> ¹ <input type="button" value="Send Test/Confirmation/Status Change E-mail"/> ²		

4. Finalize the template:
 - A. To save your changes, click SAVE.
 - B. To send a test message, click SEND TEST CONFIRMATION/STATUS CHANGE EMAIL.
5. Do one of the following to continue:
 - A. To configure another setting, click on the desired setting on the Configuration menu.
 - B. To return to the Home Page, click BACK on the menu on the left side of the page.

G. Scheduling Automatic E-mail – The notify.bat File

This is a scheduled event that requires a valid user ID and password. In most cases it is appropriate to create a dummy user with administrative privileges to run this script. However, the system will accept any user with Administrative level privileges. This should be done before attempting to add a scheduled item.

If the associated user account is disabled or deleted, the scheduled task will not run until file is updated. This has only been tested with user accounts with full administrative privileges.

The batch file will run in a Command window on the host computer for a short time.



Note – Virus Scanning Software: Any virus-scanning program setup to run on the host computer should automatically scan all outgoing email from this code as well. There should be no need to modify the configuration.

¹ Saves changes made to the template. If a multi-branch library system, changes are applied to the current branch only.

² Sends a test confirmation to the address entered in the “Default “To” Internal E-mail Address(es)” field.

How To Do It — Editing the notify.bat file

1. Locate and edit the *notify.bat* file.

▼ **Important Note:** Use only a basic text editor such as Notepad to edit these files. DO NOT use WordPad or Word, which adds formatting that corrupts the file(s).

- A. Edit batch file URL:

Contents of *notify.bat* =

```
HttpRequester.vbs http://localhost/notify/eventnotify.asp?opmode=ALL
```


Replace **http://localhost/notify/** with the URL that points to your Events installation. For example, if your URL location is: **http://mycalendar.mylibrary.org/evanced/lib/eventcalendar.asp**

Replace **http://localhost/notify/** with **http://mycalendar.mylibrary.org/evanced/lib/**. Your *notify.bat* would contain the following:

```
HttpRequester.vbs http://mycalendar.mylibrary.org/evanced/lib/eventnotify.asp?opmode=ALL
```

2. Schedule this script:

- A. Select CONTROL PANEL → SCHEDULED TASKS.
- B. Click ADD SCHEDULED TASK. The Scheduled Task Wizard opens.
- C. Click NEXT. The system will ask you to “Click the program you want Windows to run. To see more programs, click Browse.”
- D. Click BROWSE. The system displays the Select Program to Schedule window.
- E. Locate and click on the *notify.bat* file.
- F. Click OPEN.
- G. Enter a meaningful file name, such as “Event Notification”.
- H. Select ‘Daily’ to run the script once a day.
- I. Click ‘Next’.
- J. Select the start time, ‘Every Day’ and start date.
- K. Click NEXT. The system displays the current user logged into the system. Do one of the following:
 - (i) To keep the current user, do nothing and proceed to the next step, **or**
 - (ii) Enter the user log-in and password for an alternate user.

 **Important Note:** This must be a valid user account with Administrator privileges. If the user account is disabled or deleted, the scheduled task will not run until file is updated. This has only been tested with user accounts that have full administrative privileges on the server.

- L. Click NEXT. The system displays the following message if setup is successful: “You have successfully scheduled the following task . . .”
- M. Click FINISH.

3. Configuring or changing task properties:

- A. Select CONTROL PANEL → SCHEDULED TASKS.
- B. Double click on the notification item. The system displays the task’s update window. From here you may update the task’s properties and schedule.

- C. Update task properties and schedule as desired.
- D. Click APPLY.
- E. Click OK. The system closes the task update window.

Troubleshooting

Problem	Cause and Solution
<p>When I try to send an email and/or I try to register for a program, I keep getting the error message, "The transport failed to connect to the server."</p>	<p>Your web server is unable to establish a connection to your e-mail server because:</p> <ul style="list-style-type: none"> • Antivirus software (specifically McAfee VirusScan Enterprise 8.0) or a firewall (hardware or software) are blocking port 25; • The URL or IP address for the server are incorrect or cannot be resolved; or • The e-mail server is experiencing difficulties. <p>Contact your Systems Administrator for assistance.</p>
<p>I keep getting the error message, "550 5.7.1 Relaying Denied."</p>	<p>Your SMTP server configuration needs to be altered to accept email connections from the web server.</p> <p>"Relaying" means that the SMTP server does not know the server, so it will not forward any email intended for a person outside the library. If your email address ends with "@mylibrary.org" you can send email to anyone else at "@mylibrary.org", but no one else. Contact your Systems Administrator and ask them to configure the SMTP server to accept outgoing e-mails from the web server.</p>

H. Security

Security determines the password authority level to create or act on reservations (edit, delete, archive, etc.). Initial passwords are set by Evanced and provided to the project contact.

Warning: To ensure the security of your system, we recommend you change the factory set passwords.

The table below displays the available security levels and their assigned authority levels.

Multi-Branch Library System Note: Security impacts both individual branches and All Branches. We recommend that initial passwords be configured and applied at the All Branches level and then reset as necessary at the individual branch level. *Individual branch configuration overrides All Branches configuration and cannot be reset at the All Branches level.*

Security Level	Edit	Delete	Accept/Deny Pending Reservations	Read	Reserve	System Configuration	Branch Specific Lists
Read Only			C*	✓	✓		
Create Only			C*	✓	✓		
Staff	✓	✓	C*	✓	✓		
Administration	✓	✓	✓	✓	✓	✓	✓

*C=Configurable Option: The *Approval Password Level* field in System Settings determines the *lowest* security level authorized to accept or deny pending reservations.

The table below illustrates password template. This template applies regardless of the security level configured.

[Security Level] Login Change	
Administrator Password:	[Text entry field]
New Password:	[Text entry field]
Re-enter New Password:	[Text entry field]

How To Do It — Setting Passwords

- Beginning at the Home Page, click on SYSTEM CONFIGURATION AND SETTINGS (*Settings* menu). The system displays the Style Configuration Maintenance page.
- Hover over SECURITY on the menu to display security level options.
- Click on the desired security level. The system displays the password template.

[Security Level] Login Change	
Administrator Password:	[Text entry field]
New Password:	[Text entry field]
Re-enter New Password:	[Text entry field]

- In the Administrator Password field, enter the existing password.
- In the New Password field, enter a new password.

6. In the Re-enter New Password field, enter the New Password a second time to confirm the change.
7. Click SAVE to retain your changes.
8. Click BACK on the Configuration menu to return to the Home Page.

I. System Settings

System Settings determines how information in the system is organized, what options are available, how they work and whether information is optional or required when submitting a reservation. The standard system configuration categorizes System Settings into General and Requests/Reservations. If Unmediated Booking Options is enabled (General system settings), Requests/Reservations becomes Mediated Reservations and Unmediated Reservations.

Standard Configuration	Unmediated Booking Enabled
General	General
Requests/Reservations	Mediated Reservations
	Unmediated Reservations

Multi-Branch Library System Note: In a multi-branch library system, *All Branches* mode configures the number of branches in the system only.

How To Do It - Configuring General System Settings

1. Beginning at the Home Page, click on SYSTEMS CONFIGURATION AND SETTINGS (*Settings* menu). The system displays the Style Configuration Maintenance page.
2. Hover over SYSTEM SETTINGS on the menu to display system setting options.
3. Click on GENERAL. The system displays the General System Settings template.
4. Complete the template as desired.

The illustration below represents the template as it appears for an individual branch.

Field	Options	Notes and Description
Request Settings		
Enable Patron Self-Cancellation	<input checked="" type="radio"/> No <input type="radio"/> Yes	Determines whether patrons are allowed to cancel their own reservations. Patron cancellations trigger an automatic status change message from the system if Email Settings: Confirmation/Status Change has been configured and the patron has provided an e-mail address. Default: No.
Enable Request Confirmation E-mails	<input checked="" type="radio"/> No <input type="radio"/> Yes	Determines whether the system automatically sends a confirmation following a successful reservation. Default: No.
Library Card Number Length:	[##]	Refers to the number of characters in a library card number and is used to verify the authenticity of library card numbers. Use a comma separator when entering more than one number. Default: 12.
Reservation Time Interval:	[##] Minutes	Affects the appearance of time slots on the reservation calendar. Standard intervals are 15 or 30 minutes. A 15-minute interval would appear as 9:00-9:15, 9:15-9:30, etc. Default: 30 minutes.

Field	Options	Notes and Description
Maximum Staff Recurring Occurrences:	[##]	Determines the maximum number of dates that can be entered in one recurring reservation. Default: 12.
Enable Auditing:	<input checked="" type="radio"/> No <input type="radio"/> Yes	Requires anyone entering or modifying a reservation to “sign” their work by entering their name or initials. Default: No.
Enable State Entry	<input checked="" type="radio"/> No <input type="radio"/> Yes	Determines how the State field appears on the Reservation Form: <ul style="list-style-type: none"> • Select <i>No</i> to create a fixed field that assumes that all users reside in the library’s home state. • Select <i>Yes</i> to create a drop list from which users may select a state. The library’s home state is the field’s default. Default: No.
Enable Patron Side Organization Autofill:	<input checked="" type="radio"/> No <input type="radio"/> Yes	Determines whether the system suggests responses in contact fields based on the first few characters typed. Patrons may either select one of the suggestions or continue entering information manually. Default: No.
Enable Reservation Limits	<input checked="" type="radio"/> No <input type="radio"/> Yes	Enable or disable reservation limits for the branch’s associated rooms. This applies to patron-submitted reservations. When enabled (“Yes”), the system displays additional configuration fields
Default Reservation Limit	[0] Reservation(s) within [0] days	This setting appears only when “Enable Reservation Limits” is enabled. It limits the number of patron requests to [X] number of requests within [Y] number of days. The system applies this setting to room configuration settings. It is primarily used when all rooms in a library or all multi-branch system have the same reservation limits. It can be modified at any time in a room’s configuration template (Edit Mode). (Example: Patron cannot request/reserve a room more than 1 time in 30 days.)
Enable Unmediated Booking Options	<input checked="" type="radio"/> No <input type="radio"/> Yes	Changes In-House Reservations to Mediated Reservations and Unmediated Reservations on the Reservation Maintenance menu. <i>Mediated Reservations</i> require secondary approval of library staff; <i>Unmediated Reservations</i> are automatically accepted when submitted. This feature can be enabled or disabled at any time. When disabled, all unmediated rooms automatically become mediated. Default: No.

Field	Options	Notes and Description
Enable Advanced Costing	<input checked="" type="radio"/> No <input type="radio"/> Yes	Allows libraries to set fees or deposits for use of rooms and equipment. Warning: Once enabled, this feature may only be disabled when all rooms in the branch have cost classifications disabled (Room Configuration – Room Costs) and there are no reservations with associated cost classifications. The system displays the following error message when a user attempts to disable Advanced Costing: <i>“Once enabled, ADVANCED COSTING cannot be disabled until there are not any cost classifications associated with reservations in this branch.”</i> Default: No.
Enable Extended Hours	<input checked="" type="radio"/> Disable <input type="radio"/> All Rooms Extended Opening <input type="text" value="##"/> Mins.* Extended Closing <input type="text" value="##"/> Mins.** <input type="radio"/> Per Room	Allows room reservations beyond normal library hours. <ul style="list-style-type: none"> <u>Disable</u> prevents room reservations beyond normal library hours. <u>All Rooms</u> allows all rooms to be reserved beyond normal library hours. <u>Per Room</u> allows libraries to prevent or offer extended hours on a room-by-room basis. Default: Disabled.
Extended Hours Availability:	<input type="radio"/> Staff Only <input type="radio"/> Patron and Staff <input type="radio"/> Per Room	Determines <u>who</u> may submit reservations beyond normal library hours. <ul style="list-style-type: none"> <u>Staff Only</u> requires that patrons seek staff assistance when submitting reservations beyond normal library hours. <u>Patron and Staff</u> allows anyone to submit reservations beyond normal library hours. <u>Per Room</u> allows libraries to grant on a room-by-room basis the ability to submit reservations beyond normal library hours. Default: None.
Enable Equipment Inventory:	<input checked="" type="radio"/> No <input type="radio"/> Yes	Determines whether equipment can be reserved independently of rooms. Multi-Branch Library System Note: In a multi-branch library system, this is an <i>All Branches</i> setting. Warning: Once enabled, this option may not be disabled. Default: No.
Reservation Maintenance Settings		
Late Payment After	<input type="text" value="##"/> Days	Defines when a fee or deposit payment is considered late. Default: 7 Days.
Approval Password Level	<input type="text" value="Security Level"/> <input type="text" value="v"/> <input type="radio"/> Disabled	Determines the minimum security level required to approve reservations. Default: Staff user.

* These fields are hidden until the associated option is selected.

Field	Options	Notes and Description
Auto Archive Option:	<input checked="" type="radio"/> Disabled <input type="radio"/> Reservations Older than [##] Days <input type="radio"/> On the [##] of the Month	Determines whether the system automatically archives reservations and, if so, on what basis. <ul style="list-style-type: none"> “Reservations Older than . . .” archives reservations based on their age. “On the [##] of the Month” archives the previous month’s reservations on a specific day of each month (1st, 2nd, etc.) Default: Disabled.
System Settings		
<input type="button" value="Save"/> : Saves changes made to the template.		

- Click SAVE.
- Click BACK on the Configuration menu to return to the Home Page.

How To Do It — Configuring Requests/Reservations

This selection becomes “Mediated” and “Unmediated” when “Enable Unmediated Booking Options” is enabled (set to “Yes”) (System Settings → General). Mediated and Unmediated must be configured separately.

- Beginning at the Home Page, click on SYSTEMS CONFIGURATION AND SETTINGS (*Settings* menu). The system displays the Style Configuration Maintenance page.
- Hover over SYSTEM SETTINGS on the menu to display options.
- Click on REQUESTS/RESERVATIONS (or MEDIATED or UNMEDIATED). The system displays the Requests/Reservations template.
- Complete the template.


Field	Options	Notes and Description
Request/Reservation Settings		
Reservation Range	[###] Days	[Number of days in the future that the patron can make a request.]
Maximum Reservation Length	[0] Hours	[0 – no set limit beyond room hours and availability] “Maximum length of time for any one reservation, other than room hours and availability. (Example: Patron cannot request a room for more than 4 hours per mediated reservation).”
Reservation Buffer Length	[##] Minutes	[0 – No buffer applied to reservation.] “Number of minutes automatically applied between room reservations. This setting must be equal to or greater than the Reservation Time Interval , other than 0.”
Time Before Request Limit	[##] Hours	[0 – No minimum time.] “Setting for a limit on how close to the actual meeting time a room request can be submitted. Example: You cannot submit a reservation any closer than 48 hours before the reservation start time.”
Maximum Patron Recurring Occurrences	[##]	[0 – Disabled (Patron can only make 1 reservation at a time.)] “Set the maximum number of recurring room reservations that a patron can make. When set to 0 (disabled), patrons can only make 1 reservation at a time.”

Field	Options	Notes and Description
Room Policy Path	[Text Field]	"Link to Room Policy Page (.htm, .html, or .pdf). Enter path: http://. . ."
Enable Check Return/Destroy Entry	<input checked="" type="radio"/> No <input type="radio"/> Yes	"Requires a Check Return/Destroy selection when a deposit is made."
Hide Organization Name	<input checked="" type="radio"/> No <input type="radio"/> Yes	"Display "Reserved" instead of actual organization name on public views."
Default View	<input type="radio"/> Day <input type="radio"/> Week <input checked="" type="radio"/> Month <input type="radio"/> Search	"Set the default starting view."
Disable Views	<input type="checkbox"/> Day <input type="checkbox"/> Week <input type="checkbox"/> Month <input type="checkbox"/> Search	"Set the view(s) to be disabled."
Default Search Start Time	8 ↓ : 00 ↓ AM ↓	[Automatically applies to all branches.] "Set the default starting time when searching."
Default Search End time	9 ↓ : 00 ↓ PM ↓	[Automatically applies to all branches.] "Set the default ending time when searching."
<input type="button" value="Save"/> : Saves changes made to the template.		

5. Click SAVE.
6. Click BACK on the Configuration menu to return to the Home Page.

J. Branch Specific Lists

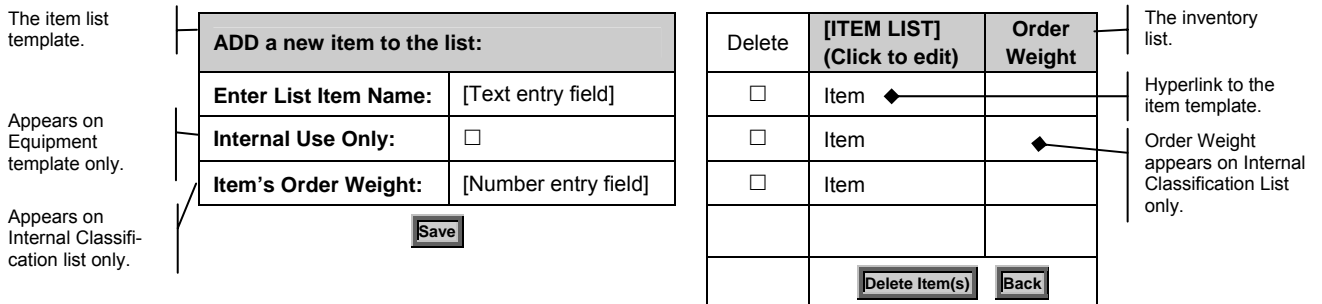
The Branch Specific lists are used to create and manage the lists, categories and classifications that appear throughout the system. Configuring the Branch Specific Lists is an Administrator level function.

 **Multi-Branch Library System Note:** In a multi-branch library system, the Branch Specific lists must be configured for each branch at the branch level.

General Principles

The following principles apply to all Branch Specific Lists.

1. The Branch Specific templates consist of the following sections:



2. All lists, except the Internal Classification List, are sorted alphabetically. The Administrator determines the sort order of the Internal Classification List based on an assigned numerical value (its "weight").

List Descriptions and Illustrations

The sections that follow describe and illustrate each Branch Specific List.

1. Fixture List

The Fixture List contains a list of fixed assets or accessories permanently installed in a room (i.e., a wall-mounted white board or projection screens). The list appears in alphabetical order.

2. Equipment List

Equipment List contains a list of mobile equipment that users can use in any room (i.e., TV/VCR/DVD cart or flip chart easel). The inventory list appears in alphabetical order. Equipment appears on either the Setup or Settings menu depending on the configuration of Equipment Inventory. When Equipment Inventory is enabled in System Settings, the Equipment List appears on the Setup Menu as *Equipment Configuration*. Otherwise, it appears on the Settings Menu as *Equipment List*.

3. Location List

The Location List allows you to enter non-traditional meeting spaces into the system. These non-traditional spaces are not defined “rooms” (i.e., having four walls, a door and a traditional meeting setup). They might include a children’s or reference section, the lobby, or the area outside the library where you might host a small gathering.

The Location List is the master list of all rooms and locations in the system regardless of how they are added to the system. When Events and Room Reserve work together, Events has access to the Configured Rooms (not Locations) on this list for scheduling events. Users may select, view information about and reserve a Configured Room. Events scheduled in a Configured Room appear on both the Events and Room Reserve calendar. (Locations configured in Events are not accessible to Room Reserve.)

The list appears in alphabetical order.

4. Group Type/Category List

Group Type/Category List contains a list of patron group types and categories (i.e., Arts and Culture, Corporate, Government, etc.). The list appears in alphabetical order. Entries on this list appear on the Room Usage Report.

5. Internal Classification List

Internal Classification List contains a list of classifications defined by the library. These classifications appear (along with the Internal Notes and Attendance Count fields) when accessing the Reservation Form in View Mode. It is visible to staff only. You may use these classifications any way you choose, including evaluating your patrons (i.e., such as Acceptable, Probation, Unacceptable/Do Not Allow Reservations, etc.).

This is the only Branch List that allows the Administrator to define list order. Each list item has an assigned order weight that determines its position on the list. The principles to assigning Order Weight are:

- (a) Order Weight appears in increments of 10.
- (b) When adding a new item, assign a number based on 5 (i.e., 5, 15, 25, etc.).
 - (1) To place a new item before an existing item, assign an order weight that is less than the existing item.
 - (2) To place a new item after an existing item, assign an order weight greater than the existing item.

(3) The system places the new item in the list and reassigns a 10-based order weight to each list item based on its place in the list.

Example:

Existing Classification	Order Weight	New Classification
Classification ➤	20	← = 25 to place here.
Classification ▲	30	
Classification ▼	40	

Result:

Existing Classification	Order Weight
Classification ➤	20
New Classification	30
Classification ▲	40
Classification ▼	50

Note: If you assign a new item an order weight that already appears in the list (new classification = 20), the system assigns the new item the next highest order weight (result = new item = 30).

How To Do It - Adding List Items

The instructions below apply to all Branch Specific Lists.

1. Beginning at the Home Page, click the desired Branch Specific List (*Settings* menu). The system displays the selected List Maintenance page.
2. Complete the list item template on the left side of the page.

Note: The list below contains all options that might appear. Items that apply to a specific template are marked. If the item does not apply to your template, skip to the next item.

- A. Enter an item name in the *Enter [Item Type]* field,.
 - B. Equipment List only: Select *Internal Use Only* to make the option visible to staff only.
 - C. Internal Classification List only: In the *Item Order Weight* field, assign a numerical weight that places the item in the desired location in the list. See Section 2.J.5 - Internal Classification List (page 24) for more information about order weights.
3. Click SAVE. The system saves and adds the item to the inventory on the right side of the page.
 4. Click BACK to return to the Home Page.

How To Do It -Modifying an Existing List Item

1. Beginning at the Home Page, click the desired Branch Specific List (*Settings* menu). The system displays the selected List Maintenance page. See the appropriate template above.
2. In the Item list, click on the desired item name. The system displays the List Modification template.
3. Make changes as desired.
4. Finalize the template:
 - A. To save changes, click SUBMIT MODIFIED ENTRY.
 - B. To cancel without saving, click BACK on the Configuration menu to return to the List Item Maintenance Page.
5. Click BACK on the Configuration menu to return to the Home Page.

How To Do It - Delete List Items

Note: List items cannot be deleted if they are in use by a reservation or a room.

1. Beginning at the Home Page, click the desired Branch Specific List (*Settings* menu). The system displays the selected List Maintenance page.

2. In the item list, click the DELETE checkbox to mark the associated item(s) for deletion.
3. Click DELETE ITEMS. The system displays asks you to confirmation your intent to delete the item:

“Are you sure you want to delete this item? OK or Cancel”.
4. Click OK or CANCEL, as appropriate, to delete the item(s) or abort the process.
 - ▼ **Caution:** CANCEL does not clear the checks marking item(s) for deletion. Be sure to uncheck marked items to prevent them from being inadvertently deleted. Click BACK to clear all checkboxes and return to the Home Page.
5. Click BACK on the Configuration menu to return to the Home Page.

Section 3. Configuring Rooms and Equipment

Room and equipment configuration occurs from the Setup menu. The equipment configuration option only appears if Equipment Inventory (*System Settings*) is enabled. Configuration involves:

- Creating the list of rooms and equipment.
- Creating the underlying templates that support the Reservation Form.
- Configuring the Reservation Forms.
- Configuring each room and equipment, including the assignment of a Reservation Form.

The mouse-over information windows available throughout the system also use the information entered during room and equipment configuration.

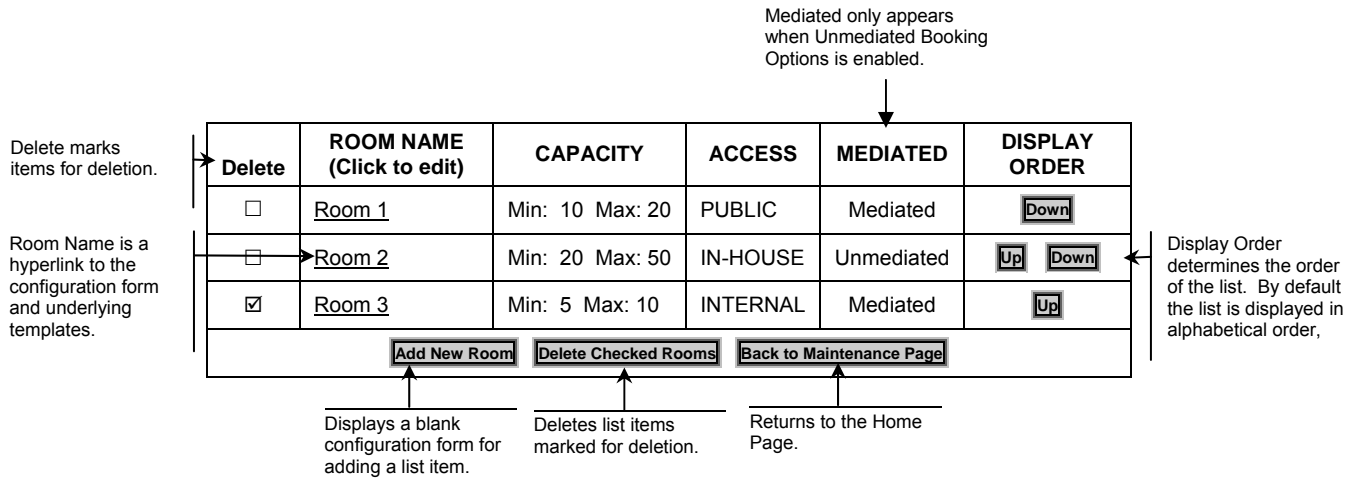
The table below contains overview descriptions of each underlying template that supports the Reservation Form.

Template	Description
Contact Form Template	The Contact Form Template determines the information requested on the Reservation Form. Libraries may create multiple templates that can be assigned on a per room or equipment basis. The Contact Form Template is available through either Room Configuration or Equipment Configuration (<i>Setup</i> menu).
Room Setup Template	The Room Setup Template determines how tables, chairs and other equipment are set in the room – lecture, round table, conference table, etc. You may create multiple templates and assign them from the Room Configuration page. The template supports graphic files, which displays graphic representations of room setups (i.e., .jpg, .bmp, .png files). The Room Setup Template is only available through Room Configuration.
Costing Template	The Costing Template determines the fee structure for reserving rooms and equipment. This feature is only available if the Enable Advanced Costing field in System Settings is set to “Yes”. You may create multiple templates and assign them from Room (or Equipment) Configuration. The Costing Template is available through either Room Configuration or Equipment Configuration (<i>Setup</i> menu).

A. The Configuration Template

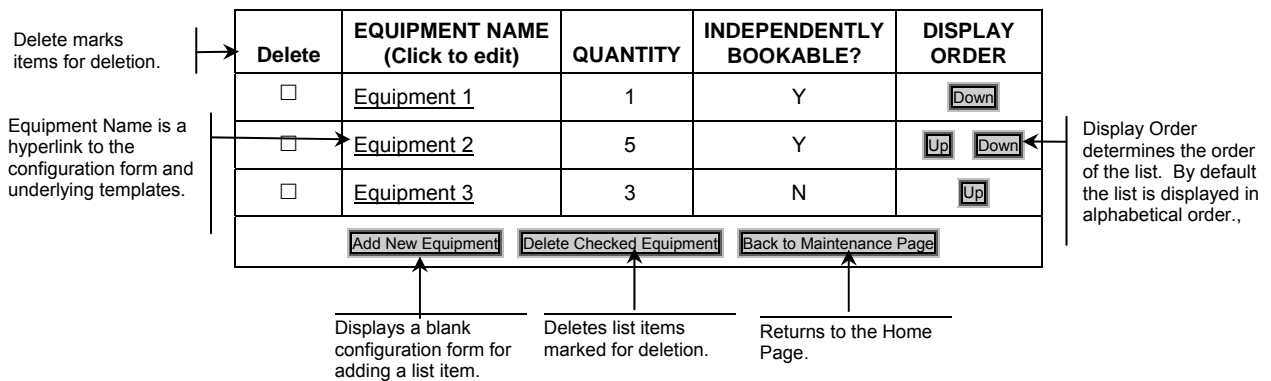
The configuration templates, illustrated below, are accessible from the *Setup* menu.

Room Configuration Template:



Equipment Configuration Template:

Note: This template is only available when Equipment Inventory is enabled (*Settings* → *General* menu).



B. Supporting Templates

Contact Form Template

The Contact Form Template, illustrated below, determines the fields that appear on the Reservation Form, what those fields are called and whether they are required or optional. Libraries may create multiple templates that may be assigned per room or per equipment. The templates are available through the *Setup* menu.

Template Name (Click to Edit)	Modify
Default	
Template 1	Copy Delete
Template 2	Copy Delete
Template 3	Copy Delete
Add New Room	

Template Name:		[Text Entry Field]		Save All	Close
Field Title		Field Description	Enabled	Required	
Library Card	Change	Change	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	
NOTE ¹	Change	Change	<input type="checkbox"/>	<input type="checkbox"/>	
Meeting Times	Change	Change	Cannot be disabled		
Number of Attendees	Change	Change	<input type="checkbox"/>	<input type="checkbox"/>	
Organization	Change	Change	<input type="checkbox"/>	<input type="checkbox"/>	
Purpose	Change	Change	<input type="checkbox"/>	<input type="checkbox"/>	
Name of Card Holder	Change	Change	Controlled by Library Card Number Setting		
Contact Person's Name	Change	Change	Controlled by Library Card Number Setting		
Primary Phone	Change	Change	<input type="checkbox"/>	<input type="checkbox"/>	
Alternate Phone	Change	Change	<input type="checkbox"/>	<input type="checkbox"/>	
Address 1	Change	Change	<input type="checkbox"/>	<input type="checkbox"/>	
Address 2	Change	Change	<input type="checkbox"/>	<input type="checkbox"/>	
City	Change	Change	<input type="checkbox"/>	<input type="checkbox"/>	
State/Province	Change	Change	<input type="checkbox"/>	<input type="checkbox"/>	
Zip	Change	Change	<input type="checkbox"/>	<input type="checkbox"/>	
Fax Number	Change	Change	<input type="checkbox"/>	<input type="checkbox"/>	
E-mail	Change	Change	<input type="checkbox"/>	Controlled by Room Configuration	
Notes ²	Change	Change	<input type="checkbox"/>	<input type="checkbox"/>	
Custom Question 1 ³	Change	Change	<input type="checkbox"/>	<input type="checkbox"/>	
Modified Custom Question 2 ³	Change	Change	<input type="checkbox"/>	<input type="checkbox"/>	
Custom Question 3 ³	Change	Change	<input type="checkbox"/>	<input type="checkbox"/>	
Custom Question 4 ³	Change	Change	<input type="checkbox"/>	<input type="checkbox"/>	
Custom Question 5 ³	Change	Change	<input type="checkbox"/>	<input type="checkbox"/>	
Custom Question 6 ³	Change	Change	<input type="checkbox"/>	<input type="checkbox"/>	
			Save All	Close	

¹NOTE is a library-configured field. When enabled, the Reservation Form displays the text configured in *System Messages: Library Card Note*.

²Note, when enabled, creates a blank text field on the Reservation Form that allows patrons to enter additional information relevant to their reservation.

³Custom Questions allow libraries to create up to six customized questions on a Reservation Form. The custom questions can be used to collect additional statistical information not otherwise gathered by Room Reserve.

How To Do It - Creating a New Template

Note: While the instructions in this section refer to “Rooms” and “Room Configuration”, the instructions apply equally to Equipment Configuration when Equipment Inventory is enabled.

The templates created here appear in the Contact Form Template drop down list on the Room template. Once created, they can be used by any room(s).

1. Beginning at the Home Page, click Room Configuration (*Setup* menu). The system displays the Room Configuration page illustrated below.

Delete	ROOM NAME (Click to edit)	CAPACITY	ACCESS	DISPLAY ORDER
<input type="checkbox"/>	Room 1	Min: 10 Max: 20	PUBLIC	<input type="button" value="Down"/>
<input type="checkbox"/>	Room 2	Min: 20 Max: 50	IN-HOUSE	<input type="button" value="Up"/> <input type="button" value="Down"/>
<input type="checkbox"/>	Room 3	Min: 5 Max: 10	INTERNAL	<input type="button" value="Up"/>
<input type="button" value="Add New Room"/> <input type="button" value="Delete Checked Rooms"/> <input type="button" value="Back to Maintenance Page"/>				

2. Click on one of the rooms listed, it doesn't matter which one. If there are no rooms listed, click on ADD NEW ROOM. The system displays the Room Configuration Template.

Field	Options
ROOM DISPLAY INFORMATION	
Select Room:	<input type="button" value="Location List"/> <input type="button" value="Add New Room Name"/>
Contact Form Template:	<input type="button" value="Contact Form Templates"/> <input type="button" value="Add/Edit"/>
Accessibility:	<input type="radio"/> Public View Only <input type="radio"/> Public Full Access <input type="radio"/> In-House Only

3. Locate the Contact Form Template field and click ADD/EDIT. The system displays the Contact Form Template.
4. Enter a template name in the Template Name field (in bold below).

Template Name (Click to Edit)	Modify	Template Name:	[Text Entry Field]	<input type="button" value="Save All"/>	<input type="button" value="Close"/>
Default					
Template 1	Copy Delete				
		Field Title	Field Description	Enabled	Required
		Library Card	Change	Change	Change
		NOTE	Change	Change	Change

5. Changing Field Titles: (Character limit = 60)

Template Name (Click to Edit)	Modify	Template Name:	[Text Entry Field]	<input type="button" value="Save All"/>	<input type="button" value="Close"/>
Default					
Template 1	Copy Delete				
Template 2	Copy Delete				
		Field Title	Field Description	Enabled	Required
		Library Card	Change	Change	Change
		NOTE	Change	Change	Change
		Meeting Times	Change	Change	Cannot be disabled
		Number of Attendees	Change	Change	Change

- A. Click CHANGE (in bold above). The system opens a text entry field containing the current Field Title.
- B. Modify the Field Title as desired.

C. Click SAVE ALL.

Note: Exiting a field does not save changes. Be sure to save your changes before closing the template. The system cancels your changes if you leave the template without saving.

6. Entering Field Descriptions: (Character limit = 60)

Note: Hover your mouse over a field name to see a description of that field.

Template Name (Click to Edit)	Modify	Template Name:	[Text Entry Field]	Save All	Close	
Default		Field Title		Field Description	Enabled	Required
Template 1	Copy Delete	Library Card	Change	Change	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>
		NOTE ¹	Change	Change	<input type="checkbox"/>	<input type="checkbox"/>
Template 2	Copy Delete	Meeting Times	Change	Change	Cannot be disabled	
		Number of Attendees	Change	Change	<input type="checkbox"/>	<input type="checkbox"/>

A. Click the CHANGE hyperlink associated with the desired Field Title. The system opens a blank text entry field.

B. Enter a field description.

C. Click in another field to close the edit field **or** click SAVE ALL. Reminder: Exiting a field does not save changes. Be sure to save your changes before closing the template. The system cancels your changes if you leave the template without saving.

7. Enabling and Disabling Fields:

Locate the Enabled column (in bold below) and click on the checkbox(es) to enable the associated fields on the Reservation Form (= enabled, = disabled). Only those fields that are enabled appear on the Reservation Form.

Template Name (Click to Edit)	Modify	Template Name:	[Text Entry Field]	Save All	Close	
Default		Field Title		Field Description	Enabled	Required
Template 1	Copy Delete	Library Card	Change	Change	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>
		NOTE ¹	Change	Change	<input type="checkbox"/>	<input type="checkbox"/>
Template 2	Copy Delete	Meeting Times	Change	Change	Cannot be disabled	
		Number of Attendees	Change	Change	<input type="checkbox"/>	<input type="checkbox"/>

8. Making fields required. Making a field "Required" makes information mandatory on the Reservation Form; users cannot submit a reservation without completing required fields.

Locate the Required column and click on the checkboxes to mark the associated fields as required on the Reservation Form (= required, = optional).

Template Name (Click to Edit)	Modify	Template Name:	[Text Entry Field]	Save All	Close	
Default		Field Title		Field Description	Enabled	Required
Template 1	Copy Delete	Library Card	Change	Change	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>
		NOTE ¹	Change	Change	<input type="checkbox"/>	<input type="checkbox"/>
Template 2	Copy Delete	Meeting Times	Change	Change	Cannot be disabled	
		Number of Attendees	Change	Change	<input type="checkbox"/>	<input type="checkbox"/>

9. Click SAVE ALL to save the template.

10. Click CLOSE to return to the Room Configuration template.

11. Continue completing or revising the Room Configuration template as desired.

12. Click SAVE to save your changes and to return to the Room Configuration page.

13. Click BACK TO MAINTENANCE PAGE to return the Home Page.

How To Do It - Modifying an Existing Template

Note: While the instructions in this section refer to “Rooms” and “Room Configuration”, the instructions apply equally to Equipment Configuration, when Equipment Inventory is enabled.

1. Beginning at the Home Page, click Room Configuration (*Setup* menu). The system displays the Room Configuration page.

Delete	ROOM NAME (Click to edit)	CAPACITY	ACCESS	DISPLAY ORDER
<input type="checkbox"/>	<u>Room 1</u>	Min: 10 Max: 20	PUBLIC	Down
<input type="checkbox"/>	<u>Room 2</u>	Min: 20 Max: 50	IN-HOUSE	Up Down
Add New Room Delete Checked Rooms Back to Maintenance Page				

2. Click on one of the rooms listed, it doesn't matter which one. The system displays the Room Configuration Template, a portion of which is illustrated below. The content of your Room Configuration Template depends on your system's configuration.

Field	Options
ROOM DISPLAY INFORMATION	
Select Room:	Location List ▼ Add New Room Name
Contact Form Template:	Contact Form Templates ▼ Add/Edit
Accessibility:	<input type="radio"/> Public View Only <input type="radio"/> Public Full Access <input type="radio"/> In-House Only

3. Locate the Contact Form Template field and click ADD/EDIT (highlighted above). The system displays the Contact Form Template, a portion of which is illustrated below.

Template Name (Click to Edit)	Modify	Template Name:	[Text Entry Field]	Save All	Close																																																																								
Default		<table border="1"> <thead> <tr> <th>Field Title</th> <th>Field Description</th> <th>Enabled</th> <th>Required</th> </tr> </thead> <tbody> <tr> <td>Library Card</td> <td>Change</td> <td>Change</td> <td><input checked="" type="checkbox"/> <input checked="" type="checkbox"/></td> </tr> <tr> <td>NOTE</td> <td>Change</td> <td>Change</td> <td><input type="checkbox"/> <input type="checkbox"/></td> </tr> <tr> <td>Meeting Times</td> <td>Change</td> <td>Change</td> <td>Cannot be disabled</td> </tr> <tr> <td>Number of Attendees</td> <td>Change</td> <td>Change</td> <td><input type="checkbox"/> <input type="checkbox"/></td> </tr> <tr> <td>Organization</td> <td>Change</td> <td>Change</td> <td><input type="checkbox"/> <input type="checkbox"/></td> </tr> <tr> <td>Purpose</td> <td>Change</td> <td>Change</td> <td><input type="checkbox"/> <input type="checkbox"/></td> </tr> <tr> <td>Name of Card Holder</td> <td>Change</td> <td>Change</td> <td>Controlled by Library Card Number Setting</td> </tr> <tr> <td>Contact Person's Name</td> <td>Change</td> <td>Change</td> <td>Controlled by Library Card Number Setting</td> </tr> <tr> <td>Primary Phone</td> <td>Change</td> <td>Change</td> <td><input type="checkbox"/> <input type="checkbox"/></td> </tr> <tr> <td>Alternate Phone</td> <td>Change</td> <td>Change</td> <td><input type="checkbox"/> <input type="checkbox"/></td> </tr> <tr> <td>Notes</td> <td>Change</td> <td>Change</td> <td><input type="checkbox"/> <input type="checkbox"/></td> </tr> <tr> <td>Custom Question 1</td> <td>Change</td> <td>Change</td> <td><input type="checkbox"/> <input type="checkbox"/></td> </tr> <tr> <td>Modified Custom Question 2</td> <td>Change</td> <td>Change</td> <td><input type="checkbox"/> <input type="checkbox"/></td> </tr> <tr> <td>Custom Question 3</td> <td>Change</td> <td>Change</td> <td><input type="checkbox"/> <input type="checkbox"/></td> </tr> <tr> <td>Custom Question 4</td> <td>Change</td> <td>Change</td> <td><input type="checkbox"/> <input type="checkbox"/></td> </tr> <tr> <td>Custom Question 5</td> <td>Change</td> <td>Change</td> <td><input type="checkbox"/> <input type="checkbox"/></td> </tr> <tr> <td>Custom Question 6</td> <td>Change</td> <td>Change</td> <td><input type="checkbox"/> <input type="checkbox"/></td> </tr> </tbody> </table>				Field Title	Field Description	Enabled	Required	Library Card	Change	Change	<input checked="" type="checkbox"/> <input checked="" type="checkbox"/>	NOTE	Change	Change	<input type="checkbox"/> <input type="checkbox"/>	Meeting Times	Change	Change	Cannot be disabled	Number of Attendees	Change	Change	<input type="checkbox"/> <input type="checkbox"/>	Organization	Change	Change	<input type="checkbox"/> <input type="checkbox"/>	Purpose	Change	Change	<input type="checkbox"/> <input type="checkbox"/>	Name of Card Holder	Change	Change	Controlled by Library Card Number Setting	Contact Person's Name	Change	Change	Controlled by Library Card Number Setting	Primary Phone	Change	Change	<input type="checkbox"/> <input type="checkbox"/>	Alternate Phone	Change	Change	<input type="checkbox"/> <input type="checkbox"/>	Notes	Change	Change	<input type="checkbox"/> <input type="checkbox"/>	Custom Question 1	Change	Change	<input type="checkbox"/> <input type="checkbox"/>	Modified Custom Question 2	Change	Change	<input type="checkbox"/> <input type="checkbox"/>	Custom Question 3	Change	Change	<input type="checkbox"/> <input type="checkbox"/>	Custom Question 4	Change	Change	<input type="checkbox"/> <input type="checkbox"/>	Custom Question 5	Change	Change	<input type="checkbox"/> <input type="checkbox"/>	Custom Question 6	Change	Change	<input type="checkbox"/> <input type="checkbox"/>
Field Title	Field Description	Enabled	Required																																																																										
Library Card	Change	Change	<input checked="" type="checkbox"/> <input checked="" type="checkbox"/>																																																																										
NOTE	Change	Change	<input type="checkbox"/> <input type="checkbox"/>																																																																										
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Purpose	Change	Change	<input type="checkbox"/> <input type="checkbox"/>																																																																										
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Contact Person's Name	Change	Change	Controlled by Library Card Number Setting																																																																										
Primary Phone	Change	Change	<input type="checkbox"/> <input type="checkbox"/>																																																																										
Alternate Phone	Change	Change	<input type="checkbox"/> <input type="checkbox"/>																																																																										
Notes	Change	Change	<input type="checkbox"/> <input type="checkbox"/>																																																																										
Custom Question 1	Change	Change	<input type="checkbox"/> <input type="checkbox"/>																																																																										
Modified Custom Question 2	Change	Change	<input type="checkbox"/> <input type="checkbox"/>																																																																										
Custom Question 3	Change	Change	<input type="checkbox"/> <input type="checkbox"/>																																																																										
Custom Question 4	Change	Change	<input type="checkbox"/> <input type="checkbox"/>																																																																										
Custom Question 5	Change	Change	<input type="checkbox"/> <input type="checkbox"/>																																																																										
Custom Question 6	Change	Change	<input type="checkbox"/> <input type="checkbox"/>																																																																										
Template 1	Copy Delete																																																																												
Template 2	Copy Delete																																																																												
Template 3	Copy Delete																																																																												
Add New Room																																																																													
Save All Close																																																																													

4. Click on the desired Template Name. The list of templates is highlighted above. The system displays the selected template. Double check the Template Name field (highlighted above) to ensure the system displays the correct template.
5. Modify the template as desired.

A. Changing Field Titles: (Character limit = 60)

Template Name (Click to Edit)	Modify	Template Name:	[Text Entry Field]	Save All	Close
Default		Field Title	Field Description	Enabled	Required
Template 1	Copy Delete	Library Card	Change	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>
Template 2	Copy	NOTE	Change	<input type="checkbox"/>	<input type="checkbox"/>
		Meeting Times	Change	Cannot be disabled	

- (i) Click CHANGE (in bold above). The system creates a text entry field containing the current Field Title.
- (ii) Modify the Field Title as desired.
- (iii) Click SAVE ALL.

Note: Exiting a field does not save changes. Be sure to save your changes before closing the template. The system cancels your changes if you leave the template without saving.

B. Entering Field Descriptions: (Character limit = 60)

Note: Hover your mouse over a field name to see a description of that field.

Template Name (Click to Edit)	Modify	Template Name:	[Text Entry Field]	Save All	Close
Default		Field Title	Field Description	Enabled	Required
Template 1	Copy Delete	Library Card	Change	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>
Template 2	Copy Delete	NOTE	Change	<input type="checkbox"/>	<input type="checkbox"/>
		Meeting Times	Change	Cannot be disabled	
		Number of Attendees	Change	<input type="checkbox"/>	<input type="checkbox"/>

- (i) Click the CHANGE hyperlink (in bold above) associated with the desired Field Title. The system creates a blank text entry field.
- (ii) Enter a field description.
- (iii) Click SAVE ALL. Reminder: Exiting a field does not save changes. Be sure to save your changes before closing the template. The system cancels your changes if you leave the template without saving.

C. Enabling and Disabling Fields:

Locate the Enabled column (in bold below) and click on the checkbox(es) to enable the associated fields on the Reservation Form (= enabled, = disabled).

Template Name (Click to Edit)	Modify	Template Name:	[Text Entry Field]	Save All	Close
Default		Field Title	Field Description	Enabled	Required
Template 1	Copy Delete	Library Card	Change	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>
Template 2	Copy Delete	NOTE	Change	<input type="checkbox"/>	<input type="checkbox"/>
		Meeting Times	Change	Cannot be disabled	
		Number of Attendees	Change	<input type="checkbox"/>	<input type="checkbox"/>

D. Making fields required. Making a field "Required" makes information mandatory on the Reservation Form; users cannot submit a reservation without completing required fields.

Locate the Required column (in bold below) and click on the checkboxes to make the associated fields as required on the Reservation Form (= required, = optional).

Template Name (Click to Edit)	Modify	Template Name:	[Text Entry Field]	<input type="button" value="Save All"/>	<input type="button" value="Close"/>
Default		Field Title	Field Description	Enabled	Required
Template 1	Copy Delete	Library Card	Change	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>
		NOTE	Change	<input type="checkbox"/>	<input type="checkbox"/>
Template 2	Copy Delete	Meeting Times	Change	Cannot be disabled	
		Number of Attendees	Change	<input type="checkbox"/>	<input type="checkbox"/>

- E. Click SAVE ALL to save the template.
- F. Click CLOSE to return to the Room Configuration template.
- 6. Continue completing or revising the template as desired.
- 7. Click BACK to return to the Room Configuration page.
- 8. Click BACK TO MAINTENANCE PAGE to return the Home Page.

How To Do It - Copying an Existing Template

Note: While the instructions in this section refer to “Rooms” and “Room Configuration”, the instructions apply equally to Equipment Configuration, when Equipment Inventory is enabled.

- 1. Beginning at the Home Page, click Room Configuration (*Setup* menu). The system displays the Room Configuration page.

Delete	ROOM NAME (Click to edit)	CAPACITY	ACCESS	DISPLAY ORDER
<input type="checkbox"/>	Room 1	Min: 10 Max: 20	PUBLIC	<input type="button" value="Down"/>
<input type="checkbox"/>	Room 2	Min: 20 Max: 50	IN-HOUSE	<input type="button" value="Up"/> <input type="button" value="Down"/>
<input type="checkbox"/>	Room 3	Min: 5 Max: 10	INTERNAL	<input type="button" value="Up"/>
<input type="button" value="Add New Room"/> <input type="button" value="Delete Checked Rooms"/> <input type="button" value="Back to Maintenance Page"/>				

- 2. Click on any room to modify an existing template. The system displays the Room Configuration template, a portion of which is illustrated below. The content of your Room Configuration template depends on your system’s configuration.

Field	Options
ROOM DISPLAY INFORMATION	
Select Room:	<input type="button" value="Location List"/> ↓ <input type="button" value="Add New Room Name"/>
Contact Form Template:	<input type="button" value="Contact Form Templates"/> ↓ <input type="button" value="Add/Edit"/>
Accessibility:	<input type="radio"/> Public View Only <input type="radio"/> Public Full Access <input type="radio"/> In-House Only

- 3. Locate the Contact Form Template field (highlighted above) and click ADD/EDIT. The system displays the Contact Form Template illustrated below.

Template Name (Click to Edit)	Modify
Default	
Template 1	Copy Delete
Template 2	Copy Delete
Template 3	Copy Delete
Add New Room	

Template Name:	[Text Entry Field]		Save All	Close
	Field Title	Field Description	Enabled	Required
Library Card	Change	Change	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>
NOTE	Change	Change	<input type="checkbox"/>	<input type="checkbox"/>
Meeting Times	Change	Change	Cannot be disabled	
Number of Attendees	Change	Change	<input type="checkbox"/>	<input type="checkbox"/>
Organization	Change	Change	<input type="checkbox"/>	<input type="checkbox"/>
Purpose	Change	Change	<input type="checkbox"/>	<input type="checkbox"/>
Name of Card Holder	Change	Change	Controlled by Library Card Number Setting	
Contact Person's Name	Change	Change	Controlled by Library Card Number Setting	
Primary Phone	Change	Change	<input type="checkbox"/>	<input type="checkbox"/>
Alternate Phone	Change	Change	<input type="checkbox"/>	<input type="checkbox"/>
Address 1	Change	Change	<input type="checkbox"/>	<input type="checkbox"/>
Address 2	Change	Change	<input type="checkbox"/>	<input type="checkbox"/>
City	Change	Change	<input type="checkbox"/>	<input type="checkbox"/>
State/Province	Change	Change	<input type="checkbox"/>	<input type="checkbox"/>
Zip	Change	Change	<input type="checkbox"/>	<input type="checkbox"/>
Fax Number	Change	Change	<input type="checkbox"/>	<input type="checkbox"/>
E-mail	Change	Change	<input type="checkbox"/>	Controlled by Room Configuration
Notes	Change	Change	<input type="checkbox"/>	<input type="checkbox"/>
Custom Question 1	Change	Change	<input type="checkbox"/>	<input type="checkbox"/>
Modified Custom Question 2	Change	Change	<input type="checkbox"/>	<input type="checkbox"/>
Custom Question 3	Change	Change	<input type="checkbox"/>	<input type="checkbox"/>
Custom Question 4	Change	Change	<input type="checkbox"/>	<input type="checkbox"/>
Custom Question 5	Change	Change	<input type="checkbox"/>	<input type="checkbox"/>
Custom Question 6	Change	Change	<input type="checkbox"/>	<input type="checkbox"/>
			Save All	Close

4. Locate the list of templates (highlighted above) and click the COPY hyperlink associated with the desired template. The system displays a copy of the selected template. Double check the Template Name field (highlighted above) to ensure the system displays the correct template.
5. Modify the template as desired. Modifying the template at this point will not affect the original as long as you rename the template.

A. Rename the template:

▼ **Warning:** If you do not rename template, the system overwrites the original.

- (i) Highlight the Template Name and type a new name. The system overwrites the original Template Name.
- (ii) Click SAVE ALL to save changes.

B. Changing Field Titles (Character limit = 60):

Template Name (Click to Edit)	Modify	Template Name:	[Text Entry Field]		Save All	Close
Default			Field Title	Field Description	Enabled	Required
Template 1	Copy Delete	Library Card	Change	Change	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>
Template 2	Copy Delete	NOTE	Change	Change	<input type="checkbox"/>	<input type="checkbox"/>
		Meeting Times	Change	Change	Cannot be disabled	
		Number of Attendees	Change	Change	<input type="checkbox"/>	<input type="checkbox"/>

- (i) Click CHANGE (highlighted above). The system creates a text entry field containing the current Field Title.
- (ii) Modify the Field Title as desired.
- (iii) Click SAVE ALL.

Note: Exiting a field does not save changes. Be sure to save your changes before closing the template. The system cancels your changes if you leave the template without saving.

C. Entering Field Descriptions: (Character limit = 60) The following instructions apply to the Field Description column highlighted below.

Note: Hover your mouse over a field name to see a description of that field.

Template Name (Click to Edit)	Modify	Template Name:	[Text Entry Field]	Save All	Close
Default		Field Title	Field Description	Enabled	Required
Template 1	Copy Delete	Library Card	Change Change	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>
Template 2	Copy Delete	NOTE	Change Change	<input type="checkbox"/>	<input type="checkbox"/>
		Meeting Times	Change Change	Cannot be disabled	
		Number of Attendees	Change Change	<input type="checkbox"/>	<input type="checkbox"/>

- (i) Click the CHANGE hyperlink associated with the desired Field Description. The system displays the selected field in edit mode.
- (ii) Enter a field description.
- (iii) Click SAVE ALL. Reminder: Exiting a field does not save changes. Be sure to save your changes before closing the template. The system cancels your changes if you leave the template without saving.

D. Enabling/Disabling Fields:

Locate the Enabled column (highlighted below) and click on the checkbox(es) to enable the associated fields on the Reservation Form (= enabled, = disabled). Only enabled fields appear on the Reservation Form.

Template Name (Click to Edit)	Modify	Template Name:	[Text Entry Field]	Save All	Close
Default		Field Title	Field Description	Enabled	Required
Template 1	Copy Delete	Library Card	Change Change	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>
Template 2	Copy Delete	NOTE	Change Change	<input type="checkbox"/>	<input type="checkbox"/>
		Meeting Times	Change Change	Cannot be disabled	
		Number of Attendees	Change Change	<input type="checkbox"/>	<input type="checkbox"/>

E. Making Fields Required and Optional:

Locate the Required column (highlighted below) and click on the checkbox(es) to make the associated fields required on the Reservation Form (= required, = optional).

Template Name (Click to Edit)	Modify	Template Name:	[Text Entry Field]	Save All	Close
Default		Field Title	Field Description	Enabled	Required
Template 1	Copy Delete	Library Card	Change Change	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>
Template 2	Copy Delete	NOTE	Change Change	<input type="checkbox"/>	<input type="checkbox"/>
		Meeting Times	Change Change	Cannot be disabled	
		Number of Attendees	Change Change	<input type="checkbox"/>	<input type="checkbox"/>

6. Finalizing and exiting the template:

A. Click SAVE ALL to save the template.

Note: Exiting the template without saving will cancel all changes.

B. Click CLOSE to return to the Room Configuration template.

7. Continue completing or revising the Configuration template as desired.

8. Click BACK to return to the Room Configuration Page.

9. Click BACK TO MAINTENANCE PAGE to return the Home Page.

How To Do It - Deleting an Existing Template

▼ **Warning:** You cannot delete a template currently in use by a room.

👉 **Note:** While the instructions in this section refer to “Rooms” and “Room Configuration”, the instructions apply equally to Equipment Configuration, when Equipment Inventory is enabled.

1. Beginning at the Home Page, click Room Configuration (*Setup* menu). The system displays the Room Configuration Maintenance page illustrated below.

Delete	ROOM NAME (Click to edit)	CAPACITY	ACCESS	DISPLAY ORDER
<input type="checkbox"/>	Room 1	Min: 10 Max: 20	PUBLIC	Down
<input type="checkbox"/>	Room 2	Min: 20 Max: 50	IN-HOUSE	Up Down
<input type="checkbox"/>	Room 3	Min: 5 Max: 10	INTERNAL	Up
Add New Room Delete Checked Rooms Back to Maintenance Page				

2. Click on any room. The system displays the Room Configuration template, a portion of which is illustrated below.

Field	Options
ROOM DISPLAY INFORMATION	
Select Room:	Location List ↓ Add New Room Name ²
Contact Form Template:	Contact Form Templates ↓ Add/Edit ²
Accessibility:	<input type="radio"/> Public View Only <input type="radio"/> Public Full Access <input type="radio"/> In-House Only

3. Locate the Contact Form Template field (in bold above) and click ADD/EDIT. The system displays the Contact Form Template illustrated below.

Template Name (Click to Edit)	Modify	Template Name:	[Text Entry Field]	Save All	Close
Default					
Template 1	Copy Delete	Library Card	Change	Change	<input checked="" type="checkbox"/> <input checked="" type="checkbox"/>
Template 2	Copy Delete	NOTE	Change	Change	<input type="checkbox"/> <input type="checkbox"/>
Template 3	Copy Delete	Meeting Times	Change	Change	Cannot be disabled
		Number of Attendees	Change	Change	<input type="checkbox"/> <input type="checkbox"/>
		Organization	Change	Change	<input type="checkbox"/> <input type="checkbox"/>
		Purpose	Change	Change	<input type="checkbox"/> <input type="checkbox"/>
		Name of Card Holder	Change	Change	Controlled by Library Card Number Setting
		Contact Person's Name	Change	Change	Controlled by Library Card Number Setting
		Primary Phone	Change	Change	<input type="checkbox"/> <input type="checkbox"/>
		Alternate Phone	Change	Change	<input type="checkbox"/> <input type="checkbox"/>
		Notes	Change	Change	<input type="checkbox"/> <input type="checkbox"/>
		Custom Question 1	Change	Change	<input type="checkbox"/> <input type="checkbox"/>
		Modified Custom Question 2	Change	Change	<input type="checkbox"/> <input type="checkbox"/>
		Custom Question 3	Change	Change	<input type="checkbox"/> <input type="checkbox"/>
		Custom Question 4	Change	Change	<input type="checkbox"/> <input type="checkbox"/>
		Custom Question 5	Change	Change	<input type="checkbox"/> <input type="checkbox"/>
		Custom Question 6	Change	Change	<input type="checkbox"/> <input type="checkbox"/>
Save All Close					

4. Locate the list of existing templates (in bold above).
5. Click the DELETE link associated with the template you want to discard. The system asks you to confirm that you want to delete the template:

“Are you sure you want to delete this template? OK | Cancel”
6. Do one of the following:
 - A. Click OK to delete the template,. If the template is in use by a room, the system displays the following message:

“The template could not be deleted because it is in use. OK”

Click OK to close the message.
 - B. Click CANCEL to abort the process and return to the Contact Form Template,.
7. Click CLOSE to return to the Room Configuration Template.
8. Continue completing or revising the template as desired.
9. Click BACK to return to the Room Configuration Page.
10. Click BACK TO MAINTENANCE PAGE to return the Home Page.

Room Setup Template

The Room Setup Template creates the setup options that appear on the Room Reservation Form. Room setup refers to the arrangement of tables, chairs and equipment in the room (i.e., lecture style, closed square, theatre style, etc.). The template, illustrated below, allows users to create multiple templates each containing up to 10 room configurations. Each template supports the attachment of files containing graphic representations of the setups (i.e., .jpg, .bmp, .png, etc.). Libraries must create their own image files.

Template Name (Click to Edit)	Modify
Setup A	Copy Delete
Setup B	Copy Delete
Add New	

New Template: [Text Entry Field]		<input type="button" value="Save"/>	<input type="button" value="Test Room Setup Page"/>	<input type="button" value="Close"/>		
Graphic Display Option:		<input checked="" type="radio"/> Use System <input type="radio"/> Use Custom File: [Text Entry Field]				
Option	Label	Alt Text	Image Path	Height	Weight	
Option A:						<input type="button" value="View"/>
Option B:						<input type="button" value="View"/>
Option C:						<input type="button" value="View"/>
Option D:						<input type="button" value="View"/>
Option E:						<input type="button" value="View"/>
Option F:						<input type="button" value="View"/>
Option G:						<input type="button" value="View"/>
Option H:						<input type="button" value="View"/>
Option I:						<input type="button" value="View"/>
Option J:						<input type="button" value="View"/>

How To Do It - Creating a New Template

Note: There must be at least one option for Room Setup Options to appear on the Reservation Form.

1. Beginning at the Home Page, click Room Configuration (*Setup* menu). The system displays the Room Configuration Maintenance page.

Delete	ROOM NAME (Click to edit)	CAPACITY	ACCESS	DISPLAY ORDER
<input type="checkbox"/>	Room 1	Min: 10 Max: 20	PUBLIC	Down
<input type="checkbox"/>	Room 2	Min: 20 Max: 50	IN-HOUSE	Up Down
<input type="checkbox"/>	Room 3	Min: 5 Max: 10	INTERNAL	Up
Add New Room Delete Checked Rooms Back to Maintenance Page				

2. Click on any room. The system displays the selected Room Configuration Template. The content of your Room Configuration Template depends on your system's configuration.

Note: If there are no rooms listed, click ADD NEW ROOM.

Field	Options
ROOM DISPLAY INFORMATION	
Select Room:	Location List ↓ Add New Room Name
Contact Form Template:	Contact Form Templates ↓ Add/Edit
Accessibility:	<input type="radio"/> Public View Only <input type="radio"/> Public Full Access <input type="radio"/> In-House Only

CONTRACT ENTRY ITEMS	
Available Equipment Add New	
<input type="checkbox"/> Equipment A	<input type="checkbox"/> Equipment D <input type="checkbox"/> Equipment G <input type="checkbox"/> Equipment B <input type="checkbox"/> Equipment E <input type="checkbox"/> Equipment H <input type="checkbox"/> Equipment C <input type="checkbox"/> Equipment F <input type="checkbox"/> Equipment I
Contract/Form File Name:	[Text Entry Field] <input type="text" value="Test"/>
Room Setup Template:	Room Setup List ↓ Add/Edit Internal use Only <input type="checkbox"/>
Non-Profit Checking:	<input checked="" type="radio"/> None <input type="radio"/> Required <input type="radio"/> Information Only [Set to None if room costs are used.]

3. Locate the Room Setup Template field in the Contract Entry Items section (highlighted above).
4. Click ADD/EDIT. The system displays the Room Setup Template Maintenance page (illustrated below). By default, the system displays a blank (new) template.

Template Name (Click to Edit)	Modify
Setup A	Copy Delete
Setup B	Copy Delete
Add New	

New Template: [Text Entry Field]		Save	Test Room Setup Page	Close		
Graphic Display Option:		<input checked="" type="radio"/> Use System <input type="radio"/> Use Custom File: [Text Entry Field]				
Option	Label	Alt Text	Image Path	Height	Weight	
Option A:						View
Option B:						View
Option C:						View
Option D:						View
Option E:						View
Option F:						View
Option G:						View
Option H:						View
Option I:						View
Option J:						View

5. Enter a template name in the New Template field (highlighted below).

Template Name (Click to Edit)	Modify
Setup A	Copy Delete
Setup B	Copy Delete

New Template: [Text Entry Field]		Save	Test Room Setup Page	Close		
Graphic Display Option:		<input checked="" type="radio"/> Use System <input type="radio"/> Use Custom File: [Text Entry Field]				
Option	Label	Alt Text	Image Path	Height	Weight	
Option A:						View

6. Graphic Display Option (highlighted below): Select one of the options listed below.

Template Name (Click to Edit)	Modify
Setup A	Copy Delete
Setup B	Copy Delete

New Template: [Text Entry Field]		Save	Test Room Setup Page	Close		
Graphic Display Option:		<input checked="" type="radio"/> Use System <input type="radio"/> Use Custom File: [Text Entry Field]				
Option	Label	Alt Text	Image Path	Height	Weight	
Option A:						View

- A. USE SYSTEM consolidates Image files entered in the Image Path fields into a single preview page on the Reservation Form. Users access the preview page by clicking on the VIEW ROOM SETUP OPTIONS button from the Reservation Form.
- B. USE CUSTOM FILE allows you to attach an .html file containing your setup options. What you enter into the text field depends on the location of your file:
 - (i) Enter the file name only if your file is in the docs folder.
 - (ii) Enter the full path to the file, if your file is in a web-accessible folder.

7. Entering Setup Information:

Template Name (Click to Edit)	Modify
Setup A	Copy Delete
Setup B	Copy Delete
Add New	

New Template: [Text Entry Field]		Save	Test Room Setup Page	Close		
Graphic Display Option:		<input checked="" type="radio"/> Use System <input type="radio"/> Use Custom File: [Text Entry Field]				
Option	Label	Alt Text	Image Path	Height	Weight	
Option A:						View
Option B:						View
Option C:						View
Option D:						View
Option E:						View
Option F:						View
Option G:						View
Option H:						View
Option I:						View
Option J:						View

- A. **Label:** Enter into the Label field the setup label as it should appear on the Reservation Form.
 - B. **Alt Text:** Enter into the Alt Text field, a description of the room setup graphic. This is the text someone using a screen reader will hear.
 - C. **Image Path:** Enter the system path to the image file.
 - D. **Height and Weight:** System automatically uses the file's default setting. You can adjust, if needed. The system measures Height and Weight in pixels and uses the file's default setting. Adjust, if needed.
 - E. **View:** Click VIEW to preview the option setup.
8. Click SAVE to save your changes.
 9. Click TEST ROOM SETUP PAGE to test Graphic Display Option – Use System. Note: This function does not work with “Use Custom File”.
 10. Click CLOSE to return to the Room Configuration Template.
 11. Continue revising the template as needed.
 12. Click BACK to return to the Room Configuration Page.
 13. Click BACK TO MAINTENANCE PAGE to return to the Home Page.

How To Do It - Copying a Room Setup Template

1. Beginning at the Home Page, click Room Configuration (*Setup* menu). The system displays the Room Configuration Maintenance Page
2. Click on the room whose template you would like to copy. The system displays the Room Configuration Template, a portion of which is illustrated below. The content of your Room Configuration Template depends on your system's configuration.

Field	Options
ROOM DISPLAY INFORMATION	
Select Room:	<div style="border: 1px solid black; padding: 2px;">Location List ↓</div> <div style="border: 1px solid black; padding: 2px; width: fit-content;">Add New Room Name</div>
Contact Form Template:	<div style="border: 1px solid black; padding: 2px;">Contact Form Templates ↓</div> <div style="border: 1px solid black; padding: 2px; width: fit-content;">Add/Edit</div>
CONTRACT ENTRY ITEMS	
Available Equipment <div style="border: 1px solid black; padding: 2px;">Add New</div>	
<input type="checkbox"/> Equipment A	<input type="checkbox"/> Equipment D
<input type="checkbox"/> Equipment B	<input type="checkbox"/> Equipment E
<input type="checkbox"/> Equipment C	<input type="checkbox"/> Equipment F
<input type="checkbox"/> Equipment G	<input type="checkbox"/> Equipment H
<input type="checkbox"/> Equipment I	
Contract/Form File Name:	<div style="border: 1px solid black; padding: 2px;">[Text Entry Field]</div> <div style="border: 1px solid black; padding: 2px; width: fit-content;">Test</div>
Room Setup Template:	<div style="border: 1px solid black; padding: 2px;">Room Setup List ↓</div> <div style="border: 1px solid black; padding: 2px; width: fit-content;">Add/Edit</div> <div>Internal use Only <input type="checkbox"/></div>
Non-Profit Checking:	<input checked="" type="radio"/> None <input type="radio"/> Required <input type="radio"/> Information Only [Set to None if room costs are used.]

3. Locate the Room Setup Template field in the Contract Entry Items section of the template.
4. Click ADD/EDIT. The system displays the Room Setup Template.

Template Name (Click to Edit)	Modify
Setup A	Copy Delete
Setup B	Copy Delete
Add New	

New Template: [Text Entry Field]		Save	Test Room Setup Page	Close		
Graphic Display Option:		<input checked="" type="radio"/> Use System <input type="radio"/> Use Custom File: [Text Entry Field]				
Option	Label	Alt Text	Image Path	Height	Weight	
Option A:						View
Option B:						View
Option C:						View
Option D:						View
Option E:						View
Option F:						View

5. Locate in the Template List the template you would like to copy.
6. Click COPY. The system displays a copy of the selected template.
7. Enter a new template name in the Template Name field. You must rename the template to prevent revisions to the original template.
8. Graphic Display Option (highlighted below): Select one of the options listed below.

Template Name (Click to Edit)	Modify
Setup A	Copy Delete
Setup B	Copy Delete

New Template: [Text Entry Field]		Save	Test Room Setup Page	Close		
Graphic Display Option:		<input checked="" type="radio"/> Use System <input type="radio"/> Use Custom File: [Text Entry Field]				
Option	Label	Alt Text	Image Path	Height	Weight	
Option A:						View

- A. USE SYSTEM consolidates Image files entered in the Image Path fields into a single preview page on the Reservation Form. Users access the preview page by clicking on the VIEW ROOM SETUP OPTIONS button from the Reservation Form.
- B. USE CUSTOM FILE allows you to attach an .html file containing your setup options. What you enter into the text field depends on the location of your file:
 - (i) Enter the file name only if your file is in the docs folder.
 - (ii) Enter the full path to the file, if your file is in a web-accessible folder.

9. Entering Setup Information:

Template Name (Click to Edit)	Modify
Setup A	Copy Delete
Setup B	Copy Delete
Add New	

New Template: [Text Entry Field]		Save	Test Room Setup Page	Close		
Graphic Display Option:		<input checked="" type="radio"/> Use System <input type="radio"/> Use Custom File: [Text Entry Field]				
Option	Label	Alt Text	Image Path	Height	Weight	
Option A:						View
Option B:						View
Option C:						View
Option D:						View
Option E:						View
Option F:						View
Option G:						View
Option H:						View
Option I:						View
Option J:						View

- A. Label: Enter into the Label field the setup label as it should appear on the Reservation Form.

- B. **Alt Text:** Enter into the Alt Text field, a description of the room setup graphic. This is the text someone using a screen reader will hear.
 - C. **Image Path:** Enter the system path to the image file.
 - D. **Height and Weight:** System automatically uses the file's default setting. You can adjust, if needed. The system measures Height and Weight in pixels and uses the file's default setting. Adjust, if needed.
 - E. **View:** Click VIEW to preview the option setup.
10. Click SAVE to save your changes.
11. Click CLOSE to close the template and return to the Room Configuration Template.

How To Do It - Deleting a Room Setup Template

1. Beginning at the Home Page, click Room Configuration (*Setup* menu). The system displays the Room Configuration Maintenance Page.
2. Click on a room.
3. Locate the Room Setup Template field in the Contract Entry Items section of the template.

Field	Options
ROOM DISPLAY INFORMATION	
Select Room:	<input type="text" value="Location List"/> <input type="button" value="Add New Room Name"/>
Contact Form Template:	<input type="text" value="Contact Form Templates"/> <input type="button" value="Add/Edit"/>
Accessibility:	<input type="radio"/> Public View Only <input type="radio"/> Public Full Access <input type="radio"/> In-House Only
CONTRACT ENTRY ITEMS	
Available Equipment <input type="button" value="Add New"/>	
<input type="checkbox"/> Equipment A	<input type="checkbox"/> Equipment D
<input type="checkbox"/> Equipment B	<input type="checkbox"/> Equipment E
<input type="checkbox"/> Equipment C	<input type="checkbox"/> Equipment F
<input type="checkbox"/> Equipment G	<input type="checkbox"/> Equipment H
<input type="checkbox"/> Equipment I	
Contract/Form File Name:	<input type="text" value="Text Entry Field"/> <input type="button" value="Test"/>
Room Setup Template:	<input type="text" value="Room Setup List"/> <input type="button" value="Add/Edit"/> Internal use Only <input type="checkbox"/>
Non-Profit Checking:	<input checked="" type="radio"/> None <input type="radio"/> Required <input type="radio"/> Information Only [Set to None if room costs are used.]

4. Click ADD/EDIT. The system displays the Room Setup Template.

Template Name (Click to Edit)	Modify
Setup A	Copy Delete
Setup B	Copy Delete
Add New	

New Template: [Text Entry Field]		<input type="button" value="Save"/>	<input type="button" value="Test Room Setup Page"/>	<input type="button" value="Close"/>		
Graphic Display Option:		<input checked="" type="radio"/> Use System <input type="radio"/> Use Custom File: [Text Entry Field]				
Option	Label	Alt Text	Image Path	Height	Weight	
Option A:						<input type="button" value="View"/>
Option B:						<input type="button" value="View"/>
Option C:						<input type="button" value="View"/>
Option D:						<input type="button" value="View"/>
Option E:						<input type="button" value="View"/>
Option F:						<input type="button" value="View"/>

- Locate in the Template List the template you wish to delete.
- Click DELETE. The system asks you to confirm your intent to delete the selected template:

“Are you sure you want to delete this template? OK Cancel”.

▼ **Warning:** The system allows you to delete a template in use by the system. This results in a blank Room Setup drop list on the Room Configuration Template and a blank Room Setup option on the Reservation Form.

- Click OK to delete the template **or** CANCEL to abort the process.


Costing Template

The Costing Template illustrated below creates a cost structure for reserving rooms and equipment. The resulting cost classifications appear on the Room Configuration and Equipment Configuration Templates. The system allows you to create unlimited cost classifications.

Cost Classification:		<table border="1"> <thead> <tr> <th>Costing Name (Click to Edit)</th> <th>Cost Classification Name</th> <th>Cost Classification Abbr</th> <th>Std Fee Type</th> <th>Ext Fee Type</th> <th>Deposit</th> <th>Order Weight</th> <th>Modify</th> </tr> </thead> <tbody> <tr> <td>Class 1</td> <td>Not-for-Profit</td> <td>Not-for-Profit</td> <td>Flat</td> <td>Flat</td> <td>Y</td> <td>10</td> <td><input type="button" value="Copy"/> <input type="button" value="Delete"/></td> </tr> <tr> <td>Class 2</td> <td>Corporate</td> <td>Corporate</td> <td>Hourly</td> <td>Hourly</td> <td>Y</td> <td>20</td> <td><input type="button" value="Copy"/> <input type="button" value="Delete"/></td> </tr> <tr> <td>Class 3</td> <td>Government</td> <td>Government</td> <td>Combo</td> <td>Hourly</td> <td>Y</td> <td>30</td> <td><input type="button" value="Copy"/> <input type="button" value="Delete"/></td> </tr> </tbody> </table>							Costing Name (Click to Edit)	Cost Classification Name	Cost Classification Abbr	Std Fee Type	Ext Fee Type	Deposit	Order Weight	Modify	Class 1	Not-for-Profit	Not-for-Profit	Flat	Flat	Y	10	<input type="button" value="Copy"/> <input type="button" value="Delete"/>	Class 2	Corporate	Corporate	Hourly	Hourly	Y	20	<input type="button" value="Copy"/> <input type="button" value="Delete"/>	Class 3	Government	Government	Combo	Hourly	Y	30	<input type="button" value="Copy"/> <input type="button" value="Delete"/>
Costing Name (Click to Edit)	Cost Classification Name	Cost Classification Abbr	Std Fee Type	Ext Fee Type	Deposit	Order Weight	Modify																																	
Class 1	Not-for-Profit	Not-for-Profit	Flat	Flat	Y	10	<input type="button" value="Copy"/> <input type="button" value="Delete"/>																																	
Class 2	Corporate	Corporate	Hourly	Hourly	Y	20	<input type="button" value="Copy"/> <input type="button" value="Delete"/>																																	
Class 3	Government	Government	Combo	Hourly	Y	30	<input type="button" value="Copy"/> <input type="button" value="Delete"/>																																	
Costing Name:	[Text Field]	<input type="button" value="Add New"/> <input type="button" value="Close"/>																																						
Cost Classification Name:	[Text Field]																																							
Cost Classification Abbr:	[Text Field]																																							
Standard Fee Type	<input checked="" type="radio"/> Flat <input type="radio"/> Hourly <input type="radio"/> Combination																																							
Extended Fee Type	<input checked="" type="radio"/> Flat <input type="radio"/> Hourly <input type="radio"/> Combination																																							
Deposit Enable:	<input checked="" type="radio"/> Yes <input type="radio"/> No																																							
Order Weight:	[##]																																							
<input type="button" value="Save"/>																																								

How To Do It - Adding a Cost Classification

- Beginning at the Home Page, click Room Configuration (*Setup* menu). The system displays the Room Configuration Page.
- Click on one of the rooms listed, it doesn't matter which one. If there are no rooms listed, click ADD NEW ROOM. The system displays the Room Configuration Template.

3. Locate the Room Costs section of the form and click ADD/EDIT COSTING CLASSIFICATION. The system displays the Costing Maintenance Template, illustrated above.
4. The system provides a blank template on the left side of the page to add a new classification.
 -  **Note:** If the template contains information for an existing template, click ADD NEW to clear the form. This does not delete any saved classifications.
5. Completing the Cost Classification Template (highlighted above):
 - A. **Costing Name:** Enter a name for the classification in the Costing Name field. This name appears only on this template.
 - B. **Cost Classification Name:** Enter a classification for the Costing Name (i.e., Not-for-Profit, Corporate, Government, etc.) in the Cost Classification Name field. This name appears on the Costing Maintenance Page only.
 - C. **Cost Classification Abbr:** Enter an abbreviation for the Cost Classification Name in the Cost Classification Abbr field. This abbreviation appears as a column heading on the Room Configuration Template and as an option on the Reservation Form.
 - D. **Standard Fee Type:** Standard Fee Type refers to the rate charged during normal hours. Click on the desired Standard Fee Type – Flat, Hourly or Combination.
 - (i) **Flat** refers to a single rate for the reservation regardless of the amount of time the reservation is needed (i.e., Room A can be reserved for a flat \$10.00 rate).
 - (ii) **Hourly** refers to a per hour charge (i.e., Room A can be reserved at a rate of \$5.00 per hour).
 - (iii) **Combination** refers to a charge that is a flat rate for the first [X] hours and \$X.XX per hour for the next [X] hours. The field display is “Charge \$___ For First [X] Hrs. + \$___ for [Drop list: Hr | Flat After].”
 - E. **Extended Fee Type:** Extended Fee Type refers to the rate charged outside of normal operation hours – flat, hourly or combination. Click on the desired Extended Fee Type. Refer to D. above for definitions of Flat, Hourly and Combination.
 - F. **Deposit Enable:** Deposit Enable activates or deactivates a deposit requirement and the amount of the deposit. When activated, this field appears as on the Room Configuration Template as “Deposit Charge \$[_____]”.
Click YES to enable a deposit option. (The default is NO.)
 - G. **Order Weight:** Each list item has an assigned order weight that determines its position on the list. The principles to assigning Order Weight are:
 - (i) Order Weight appears in increments of 10.
 - (ii) When adding a new item, assign a number based on 5 (i.e., 5, 15, 25, etc.).
 - (a) To place a new item before an existing item, assign an order weight that is less than the existing item.
 - (b) To place a new item after an existing item, assign an order weight greater than the existing item.
 - (c) The system places the new item in the list and reassigns a 10-based order weight to each list item based on its place in the list.

Example:

Existing Classification	Order Weight	New Classification
Classification >	20	← = 25 to place here.
Classification ▲	30	
Classification ▼	40	

Result:

Existing Classification	Order Weight
Classification >	20
New Classification	30
Classification ▲	40
Classification ▼	50

Note: If you assign a new item an order weight that already appears in the list (i.e., new classification = 20), the system assigns the new item the next highest order weight (result = new item = 30).

6. Click SAVE to add the new classification.
7. Click CLOSE to return to the Room Configuration Template.
8. Finish editing the Room Configuration Template, if desired. Whether or not you save a Room Configuration Template, does not affect your Costing Templates.
9. Click SAVE to keep your changes or BACK to cancel your changes and return to the Room Configuration Page.
10. Click BACK TO MAINTENANCE PAGE to return to the Home Page.

How To Do It - Editing a Cost Classification

1. Beginning at the Home Page, click Room Configuration (*Setup* menu). The system displays the Room Configuration Page.
2. Click on one of the rooms listed, it doesn't matter which one. If there are no rooms listed, click ADD NEW ROOM. The system displays the Room Configuration Template.
3. Locate the Room Costs section of the form and click ADD/EDIT COSTING CLASSIFICATION. The system displays the Costing Maintenance Template.
4. Click on the Costing Name you'd like to edit. The system displays the Costing Classification's information on the left side of the page. Note: This action appears as a subtle screen refresh.
5. Edit costing information as desired.
6. Click SAVE to retain your changes
7. Click CLOSE to return to the Room Configuration Template.
8. Finish editing the Room Configuration Template, if desired. Whether or not you save a Room Configuration Template, does not affect your Costing Templates.
9. Click SAVE to keep your changes or BACK to cancel your changes and return to the Room Configuration Page.
10. Click BACK TO MAINTENANCE PAGE to return to the Home Page.

How To Do It - Copying a Cost Classification

1. Beginning at the Home Page, click Room Configuration (*Setup* menu). The system displays the Room Configuration Page.
2. Click on one of the rooms listed, it doesn't matter which one. If there are no rooms listed, click ADD NEW ROOM. The system displays the Room Configuration Template.
3. Locate the Room Costs section of the form and click ADD/EDIT COSTING CLASSIFICATION. The system displays the Costing Maintenance Template.
4. Locate the Cost Classification you want to copy and click the associated COPY link. The system displays a copy of the Cost Classification's settings in the Cost Classification table. Note: This action appears as a subtle screen refresh.
5. Rename the Cost Classification (Costing Name field).
6. Edit the remaining fields as desired.
7. Click SAVE to retain your changes
8. Click CLOSE to return to the Room Configuration Template.
9. Finish editing the Room Configuration Template, if desired. Whether or not you save a Room Configuration Template, does not affect your Costing Templates.
10. Click SAVE to keep your changes or BACK to cancel your changes and return to the Room Configuration Page.
11. Click BACK TO MAINTENANCE PAGE to return to the Home Page.

How To Do It - Deleting a Cost Classification

1. Beginning at the Home Page, click Room Configuration (*Setup* menu). The system displays the Room Configuration Page.
2. Click on one of the rooms listed, it doesn't matter which one. If there are no rooms listed, click ADD NEW ROOM. The system displays the Room Configuration Template.
3. Locate the Room Costs section of the form and click ADD/EDIT COSTING CLASSIFICATION. The system displays the Costing Maintenance Template.
4. Locate the Cost Classification you want to delete and click the associated DELETE link. The system displays one of the following messages based upon the classification's status in the system:

	Room Associations	Reservation Associations	No Conflicts
Message	"This template has rooms associated with it. Are you sure you want to delete it? Press OK to delete. OK Cancel"	"This template has reservations associated with it and cannot be deleted at this time. OK"	"Are you sure you want to delete this template? OK Cancel"
Action	Clicking OK removes the field as an option from <u>all</u> rooms. Click CANCEL and review room configurations before deleting classification.	Click OK. The classification cannot be deleted until the reservations have been deleted.	Click OK to delete the classification or CANCEL to abort the process.

5. Click CLOSE to return to the Room Configuration Template.
6. Finish editing the Room Configuration Template, if desired. Whether or not you save a Room Configuration Template, does not affect your Costing Templates.
7. Click SAVE to keep your changes or BACK to cancel your changes and return to the Room Configuration Page.

8. Click BACK TO MAINTENANCE PAGE to return to the Home Page.

C. Configuring Rooms

Configuration involves completing a Room Configuration Template that includes:

- A room profile - a room's capacity, standard fixtures and equipment fixed in the room (i.e., they can't be removed from the room), who can reserve the room (patrons and/or staff), and which Reservation Form must be completed.
- Reservation contract items - non-standard equipment that can be brought into the room, the library's usage agreement, room setup options, any additional information the library might ask for (i.e., not-for-profit status, organization category, event type category), and, if applicable, whether the reservation should appear on the Events calendar.
- Email routing information for request and status change e-mails.
- Fee and deposit information related to the room, if applicable.
- The hours during patrons may reserve the room – standard, alternate and extended.

The Room Configuration Template also provides access to the supporting templates: the Contract Form, the Room Setup Template and Costing Template.

The table below illustrates a sample Room Configuration Template as it appears when adding a new room.

Field	Options	Description
ROOM DISPLAY INFORMATION		
Select Room:	<input type="text" value="Location List"/> <input type="button" value="Add New Room Name"/>	¹ Source is Branch Specific Lists → Location List. ² Link to Location List Maintenance.
Contact Form Template:	<input type="text" value="Contact Form Templates"/> <input type="button" value="Add/Edit"/>	¹ Select a template; or ² Click to create a new or edit an existing template.
Mediation Setting:	<input checked="" type="radio"/> Mediated (Requires Approval) <input type="radio"/> Unmediated (Direct to Reservation)	This field only appears if "Enable Unmediated Booking Option" (System Settings) is set to "Yes". It determines whether a patron may reserve a room without secondary approval by staff.
Accessibility:	<input type="radio"/> Public View Only <input type="radio"/> Public Full Access <input type="radio"/> In-House Only	Determines who may see and reserve the room. Default: Public Full Access.
Enable Reservation Limits:	<input checked="" type="radio"/> No <input type="radio"/> Yes	Enables option to control X number of reservations in Y number of days.
Default Reservation Limit:	[0] Reservation(s) within [0] days	This field only appears if the <i>Enable Reservation Limits</i> field is set to "Yes".
Minimum Capacity:	[##]	Determines the minimum number of attendees a reservation must have to reserve the room. A reservation that does not meet the minimum capacity generates an error message. Default: 0

Field	Options	Description
*Maximum Capacity	[##]	Determines the maximum number of attendees the room will accommodate. A reservation that exceeds the maximum capacity generates an error message. This is a required field. Default: 0
Combined Room:	<input checked="" type="radio"/> No <input type="radio"/> Yes	Determines whether the room is a single complete room or whether the room can be combined with a second room to create a larger room. This creates 2 reservation options for a room. The room may be reserved (1) as a single, small room, or (2) with a second room to create one large room. This is useful where a large room can be subdivided by a moveable wall or partition. When set to <u>Yes</u> , the Select Rooms to Combine field appears. When set to <u>No</u> , the field is hidden. Default: No
Select Rooms to Combine:	<input type="checkbox"/> Room 1 <input type="checkbox"/> Room 2 <input type="checkbox"/> Room 3	This field only appears if the Combined Room field is set to <u>Yes</u> . Only configured rooms appear in this list. Locations added through Branch Specific Lists do not appear here.
Standard Fixtures Add New		Add New loads the Fixture List Maintenance page. (The Fixtures List is also accessible from the Home Page through the Settings menu.) Fixtures are room features that cannot be removed from the room (i.e., wall-mounted white-boards, projection screens, etc.).
<input type="checkbox"/> Fixture A	<input type="checkbox"/> Fixture D	
<input type="checkbox"/> Fixture B	<input type="checkbox"/> Fixture E	
<input type="checkbox"/> Fixture C	<input type="checkbox"/> Fixture F	
<input type="checkbox"/> Fixture G <input type="checkbox"/> Fixture H <input type="checkbox"/> Fixture I		
Other Information:	[Text Box]	
Standard Equipment Add New		Standard Equipment is equipment that may be portable but is assigned to a room and is generally available when the room is reserved. This field only appears when the System Setting "Equipment Inventory" is set to "No". Add New loads the Equipment List Maintenance page. (The Equipment List is also accessible from the Home Page through the Settings menu.)
<input type="checkbox"/> Equipment A	<input type="checkbox"/> Equipment D	
<input type="checkbox"/> Equipment B	<input type="checkbox"/> Equipment E	
<input type="checkbox"/> Equipment C	<input type="checkbox"/> Equipment F	
<input type="checkbox"/> Equipment G <input type="checkbox"/> Equipment H <input type="checkbox"/> Equipment I		
Other Information	[Text Entry Field]	
CONTRACT ENTRY ITEMS		
Available Equipment Add New		Available Equipment is portable equipment that is available on a reservation-by-reservation basis. This equipment generally needs to be moved into the room for a reservation (i.e., a TV/VCR/DVD cart). Add New loads the Equipment List Maintenance page. (The Equipment List is also accessible from the Home Page through the Settings menu.)
<input type="checkbox"/> Equipment A	<input type="checkbox"/> Equipment D	
<input type="checkbox"/> Equipment B	<input type="checkbox"/> Equipment E	
<input type="checkbox"/> Equipment C	<input type="checkbox"/> Equipment F	
<input type="checkbox"/> Equipment G <input type="checkbox"/> Equipment H <input type="checkbox"/> Equipment I		
Contract/Form File Name:	[Text Entry Field] Test	Refers to the library's agreement with the organization reserving the room. Click Test to check the link to the file.

Field	Options	Description
Room Setup Template:	Room Setup List <input type="button" value="v"/> ¹ <input type="button" value="Add/Edit"/> ² Internal use Only <input type="checkbox"/> ³	Room Setup Template contains illustrations of possible table and chair arrangements in a room. ¹ List of room configurations. This list was created in the Room Setup Template. ² Add/Edit displays the Room Setup Template Maintenance screen, which was used to create the original list. ³ Internal Use Only hides room setups from public view.
Non-Profit Checking:	<input checked="" type="radio"/> None <input type="radio"/> Required <input type="radio"/> Information Only [Set to None if room costs are used.]	Determines whether the non-profit stipulation appears on the Reservation Form and whether the information is required or optional. Default: None.
Enable Category Drop List:	<input type="radio"/> Yes <input checked="" type="radio"/> No	Determines whether an organization type field - hospital, local government, etc. - appears on the Reservation Form. The Category Drop List that appears on the Reservation Form was configured in Group Type/Category List (Settings menu). Default: No.
Require E-mail Address:	<input type="radio"/> Yes <input checked="" type="radio"/> No	Determines whether the e-mail address field on the Reservation Form is required or optional. Default: No.
Enable the Reservation to be Displayed on Event Calendar:	<input type="radio"/> No <input type="radio"/> Per Request <input type="radio"/> Always On	This field appears only if Room Reserve works and Events work together. It determines whether and on what basis reservations appear on the Event Calendar. <ul style="list-style-type: none"> • <u>No</u> prevents reservations from appearing on the Events calendar • <u>Per Request</u> creates flexibility to determine on a reservation-by-reservation basis what appears on the Events calendar. • <u>Always</u> displays all reservations on the Events calendar.
Assigned Event Type:	<input type="radio"/> Per Request <input type="radio"/> Always	This field appears only if Room Reserve works with Events. It determines whether and on what basis the Event Type field appears on the Reservation Form. <ul style="list-style-type: none"> • <u>Per Request</u> creates flexibility to determine on a reservation-by-reservation basis whether the Event Type field is required or optional. • <u>Always</u> makes the Event Type field required for all reservations.
INTERNAL NOTIFICATION		
Requests/Status Change E-mail Name:	[Text Entry Field]	The name of the internal contact receiving notification of room reservation requests and status changes.
Requests/Status Change E-mail Address	[Text Entry Field]	The e-mail address associated with the Requests/Status Change E-mail Name field.

Field	Options	Description																				
Equipment Requests E-mail Name:	[Text Entry Field]	The name of the internal contact receiving notification of equipment reservation requests and status changes.																				
Equipment Requests E-mail Address:	[Text Entry Field]	The e-mail address associated with the Equipment Requests E-mail Name field.																				
ROOM COSTS:																						
Costs for Reserving a Room?	<input type="radio"/> Yes <input checked="" type="radio"/> No	Determines whether a patron must pay to use the room. This basic costing field appears only if Advanced Costing (System Settings & Configuration → System Settings) is disabled. Default: No.																				
Payment Type:	<input checked="" type="radio"/> Fee <input type="radio"/> Deposit	Determines the type of charge required. This basic costing field appears only if Advanced Costing (System Settings & Configuration → System Settings) is disabled. Default: Fee.																				
Cost Schedule:	<table border="1"> <thead> <tr> <th>Level</th> <th>Hours</th> <th>Profit</th> <th>Profit</th> <th>Hourly</th> </tr> </thead> <tbody> <tr> <td>1</td> <td>[##]</td> <td>[\$##]</td> <td>[\$##]</td> <td><input type="checkbox"/></td> </tr> <tr> <td>2</td> <td>[##]</td> <td>[\$##]</td> <td>[\$##]</td> <td><input type="checkbox"/></td> </tr> <tr> <td>3</td> <td>[##]</td> <td>[\$##]</td> <td>[\$##]</td> <td><input type="checkbox"/></td> </tr> </tbody> </table>	Level	Hours	Profit	Profit	Hourly	1	[##]	[\$##]	[\$##]	<input type="checkbox"/>	2	[##]	[\$##]	[\$##]	<input type="checkbox"/>	3	[##]	[\$##]	[\$##]	<input type="checkbox"/>	Determines the rate schedule for reserving a room. This basic costing field appears only if Advanced Costing (System Settings & Configuration → System Settings) is disabled.
Level	Hours	Profit	Profit	Hourly																		
1	[##]	[\$##]	[\$##]	<input type="checkbox"/>																		
2	[##]	[\$##]	[\$##]	<input type="checkbox"/>																		
3	[##]	[\$##]	[\$##]	<input type="checkbox"/>																		
Cost for Serving Food?:	<input type="radio"/> Yes <input checked="" type="radio"/> No	Determines if catering charges apply. This basic costing field appears only if Advanced Costing (System Settings & Configuration → System Settings) is disabled. Default: No.																				
Payment Type:	<input checked="" type="radio"/> Fee <input type="radio"/> Deposit	Determines the type of catering charges that apply. This basic costing field appears only if Advanced Costing (System Settings & Configuration → System Settings) is disabled.																				
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Level	Hours	Profit	Profit																			
1	[##]	[\$##]	[\$##]																			
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Field		Options		Description																																										
Extended Hours	<input type="radio"/> Not Applicable <input type="radio"/> No Charge <input type="radio"/> Charge \$[] Flat Rate <input type="radio"/> Charge \$[] Per Hour <input type="radio"/> Charge \$[] For First [] Hrs + [] [Per Hr ↓ <input type="checkbox"/> Deposit Charge \$[]	<input type="radio"/> Not Applicable <input type="radio"/> No Charge <input type="radio"/> Charge \$[] Flat Rate <input type="radio"/> Charge \$[] Per Hour <input type="radio"/> Charge \$[] For First [] Hrs + [] [Per Hr ↓ <input type="checkbox"/> Deposit Charge \$[]	See Standard Hours, above, for a description of this field.																																											
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Extended Hours Availability		<input checked="" type="radio"/> Staff Only <input type="radio"/> Patron and Staff		Room Availability determines the hours a room is available. Extended Hours (System Settings & Configuration → System Settings) fields appear only if enabled. <ul style="list-style-type: none"> Standard Hours generally coincides with a library's hours of operation. Alternate Hours refers to periods during the year when a library's hours may change (i.e., summer hours). Alternate Hours <u>does not</u> refer to holidays or other closings. See Chapter IV Section 3 – Holidays and Other Closings for more information. Extended Hours are the hours outside the library's normal operating hours. 																																										
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<input type="button" value="Save"/> : Saves room configuration and returns user to the Room Configuration Maintenance page. <input type="button" value="Back"/> : Cancels any revisions and returns user to the Room Configuration Maintenance page.																																														

How To Do It - Adding a Room

- Beginning at the Home Page, click Room Configuration (*Setup* menu). The system displays the Room Configuration page.
- Click ADD A NEW ROOM. The system displays a blank Room Configuration Template.
- Complete the Room Configuration Template. See the illustration above for more information.
- Click SAVE to keep or BACK to cancel your changes and return to the Room Configuration Page.
- Click BACK TO MAINTENANCE PAGE to return to the Home Page.

How To Do It -Editing Room Configurations

- Beginning at the Home Page, click Room Configuration (*Setup* menu). The system displays the Room Configuration page.
- Click on the desired room. The system displays the selected Room Configuration Template.
- Edit the template as desired. See the template illustration above for more information.
- Click SAVE to keep your changes or BACK to cancel your changes and return to the Room Configuration Page.

5. Click BACK TO MAINTENANCE PAGE to return to the Home Page.

How To Do It - Deleting Rooms

Note: The system will not allow you to delete a room as long as there are reservations for the room, including active and archived reservations.

1. Beginning at the Home Page, click Room Configuration (*Setup* menu). The system displays the Room Configuration page.
2. Mark the desired item(s) for deletion by clicking on the associated checkbox in the Delete Column.
3. Click DELETE CHECKED ROOM(S). The system removes all marked item(s) from inventory.
4. Click BACK TO MAINTENANCE PAGE to return to the Home Page.

D. Configuring Equipment

Equipment appears on the Setup or Settings menu depending on your system’s configuration. The table below outlines where the Equipment Configuration appears when “Enable Equipment Inventory” (System Settings & Configuration → System Settings) is enabled. The information that follows assumes equipment inventory has been enabled.

Equipment	Enable Equipment Inventory	
	Enabled	Disabled
Settings Menu (Branch Specific Lists)		✓
Setup Menu (Equipment Configuration)	✓	
Reservation Maintenance Menu	✓	
Reports Menu	✓	

Enabling Equipment Inventory allows equipment to be configured, reserved, tracked and monitored using the same processes associated with rooms.

Configuring equipment involves completing an Equipment Configuration Template that includes the following information:

- An equipment profile that includes a description of the equipment, the quantity on hand, how many can be reserved in one reservation, and a picture of the equipment, if desired.
- Email routing information for request and status change e-mails.
- Fee and deposit information related to the equipment, if applicable.

The Equipment Configuration Template also provides access to the supporting templates: Contact Form and Costing Template.

Information from the Equipment Configuration Template appears in mouse-over displays and on the Equipment Reservation Form. The table below illustrates the Equipment Configuration Template.

Field	Options	Description
EQUIPMENT DISPLAY INFORMATION		
Equipment Name:	[Text Entry Field]	The equipment name as it should appear in inventory and In-House Reservations.
Independently Bookable:	<input type="radio"/> Yes <input checked="" type="radio"/> No [Note: If yes, the system reveals the hidden fields show below.] <input type="radio"/> Public View Only <input type="radio"/> Public Full Access	<ul style="list-style-type: none"> • Yes allows equipment reservations without a room. When enabled, the system reveals hidden fields that allow you to set reservation limits and define who has access. Reservation limits are defined in “days” (i.e., 2

Field	Options	Description																									
	<input type="radio"/> In-House Only Enable Reservation Limits: <input checked="" type="radio"/> No <input type="radio"/> Yes Default Reservation Limit: [##] Reservation(s) within [##]	Reservation(s) within 2 [days]. <ul style="list-style-type: none"> No requires an associated_room reservation to book equipment. 																									
Booked Via Room Accessibility	<input type="checkbox"/> In-House Only	When checked, the equipment item appears only on the staff version of a Room Reservation Form. The item does not appear on the public Room Reservation form.																									
Description	[Text Entry Field]	Describes the equipment and its features.																									
Quantity on Hand:	[##]	Refers to the total number available for reservation. Default: 0																									
Maximum Quantity Reservable Per Request:	[##]	Refers to the maximum number of items bookable in one reservation. For example, if you have 4 speakers in your inventory, enter "2" to restrict a single reservation to 2 of the 4 speakers.																									
Image Path:	[Text Entry Field]	The path to the equipment image file. The file may be .jpg, .png or .gif format.																									
Other Information:	[Text Entry Field Name]	Any additional information about the equipment or terms of usage.																									
INTERNAL NOTIFICATION																											
Requests/Status Change E-mail Name:	[Text Entry Field]	The name of the internal contact receiving reservation and status change notifications.																									
Requests/Status Change E-mail Address	[Text Entry Field]	The e-mail address associated with Requests/Status Change E-mail Name.																									
EQUIPMENT COSTS:																											
Costs for Reserving Equipment?	<input type="radio"/> Yes <input checked="" type="radio"/> No	Determines if there is a charge to reserve equipment. This basic costing field appears only if Advanced Costing (System Settings & Configuration) is disabled. Default: No.																									
Payment Type:	<input checked="" type="radio"/> Fee <input type="radio"/> Deposit	Determines the type of charge required. This basic costing field appears only if Advanced Costing (System Settings & Configuration) is disabled. Default: Fee.																									
Cost Schedule:	<table border="0"> <tr> <td></td> <td></td> <td colspan="2">Non</td> <td></td> </tr> <tr> <td><u>Level</u></td> <td><u>Hours</u></td> <td><u>Profit</u></td> <td><u>Profit</u></td> <td><u>Hourly</u></td> </tr> <tr> <td>1</td> <td>[##]</td> <td>[\$##]</td> <td>[\$##]</td> <td><input type="checkbox"/></td> </tr> <tr> <td>2</td> <td>[##]</td> <td>[\$##]</td> <td>[\$##]</td> <td><input type="checkbox"/></td> </tr> <tr> <td>3</td> <td>[##]</td> <td>[\$##]</td> <td>[\$##]</td> <td><input type="checkbox"/></td> </tr> </table>			Non			<u>Level</u>	<u>Hours</u>	<u>Profit</u>	<u>Profit</u>	<u>Hourly</u>	1	[##]	[\$##]	[\$##]	<input type="checkbox"/>	2	[##]	[\$##]	[\$##]	<input type="checkbox"/>	3	[##]	[\$##]	[\$##]	<input type="checkbox"/>	Determines the rate schedule for reserving equipment. This basic costing field appears only if Advanced Costing (System Settings & Configuration) is disabled.
		Non																									
<u>Level</u>	<u>Hours</u>	<u>Profit</u>	<u>Profit</u>	<u>Hourly</u>																							
1	[##]	[\$##]	[\$##]	<input type="checkbox"/>																							
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Field	Options		Description
Add/Edit Cost Classification			This button loads the Costing Template associated with this Reservation Form.
	Cost Class 1	Cost Class 2	
Standard Hours	<input type="radio"/> Not Applicable <input type="radio"/> No Charge <input type="radio"/> Charge \$[] Flat Rate <input type="radio"/> Charge \$[] Per Hour <input type="radio"/> Charge \$[] For First [] Hrs + [] [Per Hr] ↓ <input type="checkbox"/> Deposit Charge \$[]	<input type="radio"/> Not Applicable <input type="radio"/> No Charge <input type="radio"/> Charge \$[] Flat Rate <input type="radio"/> Charge \$[] Per Hour <input type="radio"/> Charge \$[] For First [] Hrs + [] [Per Hr] ↓ <input type="checkbox"/> Deposit Charge \$[]	This field appears only when Advanced Costing (System Settings & Configuration → System Settings) is enabled. Cost Classifications are configured on the Costing Template and determine which options appear. Click ADD/EDIT COST CLASSIFICATION to access the template.
Extended Hours	<input type="radio"/> Not Applicable <input type="radio"/> No Charge <input type="radio"/> Charge \$[] Flat Rate <input type="radio"/> Charge \$[] Per Hour <input type="radio"/> Charge \$[] For First [] Hrs + [] [Per Hr] ↓ <input type="checkbox"/> Deposit Charge \$[]	<input type="radio"/> Not Applicable <input type="radio"/> No Charge <input type="radio"/> Charge \$[] Flat Rate <input type="radio"/> Charge \$[] Per Hour <input type="radio"/> Charge \$[] For First [] Hrs + [] [Per Hr] ↓ <input type="checkbox"/> Deposit Charge \$[]	See Standard Hours, above, for a description of this field.
EQUIPMENT AVAILABILITY:			
Extended Hours Availability		<input checked="" type="radio"/> Staff Only <input type="radio"/> Patron and Staff	
Standard Hours		Extended Hours	
Weekday	Start Time	End Time	Start Time
Monday	Time ↓	Time ↓	Time ↓
Tuesday	Time ↓	Time ↓	Time ↓
Wednesday	Time ↓	Time ↓	Time ↓
Thursday	Time ↓	Time ↓	Time ↓
Friday	Time ↓	Time ↓	Time ↓
Saturday	Time ↓	Time ↓	Time ↓
Sunday	Time ↓	Time ↓	Time ↓
Alternate Hours (Optional)		Extended Hours	
Starting On: Date List ↓			
Ending On: Date List ↓			
Weekday	Start Time	End Time	Start Time
Monday	Time ↓	Time ↓	Time ↓
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Equipment Availability determines the hours during which equipment is available. Extended Hours (System Settings & Configuration → System Settings) fields appear only if enabled.			
<ul style="list-style-type: none"> Standard Hours generally coincides with a library's hours of operation. Alternate Hours refers to periods during the year when a library's hours may change (i.e., summer hours). Alternate Hours <u>does not</u> refer to holidays or other closings. See Chapter IV Section 3 – Holidays and Other Closings for more information. Extended Hours are the hours outside the library's normal operating hours. 			
Save : Saves room configuration and returns user to the Room Configuration Maintenance page.			
Back : Cancels any revisions and returns user to the Room Configuration Maintenance page.			

How To Do It - Adding New Equipment

- Beginning at the Home Page, click Equipment Configuration (*Setup* menu). The system displays the Equipment Configuration page.
- Click ADD A NEW EQUIPMENT. The system displays a blank Equipment Configuration Template.
- Complete the Equipment Configuration Template. See the illustration above for more information.

4. Click **SAVE** to keep or **BACK** to cancel your changes and return to the Equipment Configuration page.
5. The equipment inventory list appears in alphabetical order by default. Click **UP** or **DOWN** (Display Order column) to move an item within the list.
6. Click **BACK TO MAINTENANCE PAGE** to return to the Home Page.

How To Do It - Editing Equipment Configurations

1. Beginning at the Home Page, click Equipment Configuration (*Setup* menu). The system displays the Equipment Configuration page.
2. Click on the desired equipment name. The system displays the selected Equipment Configuration Template.
3. Edit the template as desired. See the template illustration above for further information.
4. Click **SAVE** to keep or **BACK** to cancel your changes and return to the Equipment Configuration page.
5. Click **BACK TO MAINTENANCE PAGE** to return to the Home Page.

How To Do It - Deleting Equipment from Inventory

Note: The system will not allow you to delete equipment as long as there are reservations for the equipment, including both active and archived reservations.

1. Beginning at the Home Page, click Equipment Configuration (*Setup* menu). The system displays the Equipment Configuration page.
2. Mark the desired item(s) for deletion by clicking on the associated checkbox in the Delete Column.
3. Click **DELETE CHECKED EQUIPMENT**.
 - A. The system displays the following message if it finds reservations – active or archived – associated with marked equipment.

“There was a problem with the information you entered: This equipment cannot be deleted: [##] reservation(s) associated with this equipment. The equipment can be deleted from the list once there are no associated reservations. Please click on the back button to correct the error and resubmit.”
 - B. If there are no reservations associated with the equipment, the system removes all marked item(s) from inventory.
4. Click **BACK TO MAINTENANCE PAGE** to return to the Home Page.

APPENDIX C. EVENTS AND ROOM RESERVE A GUIDE TO FUNCTIONS AND RESPONSIBILITIES

The intention of this information sheet is to provide a high level overview of Events and Room Reserve as standalone applications and as partners. When working together, each retains its original functions (except those related to holidays and closings) while benefiting from cross-functional strengths.

Events	Room Reserve
<ul style="list-style-type: none"> • Events provides tools for: <ul style="list-style-type: none"> ➢ Managing Library-sponsored events and activities. ➢ Reporting event schedules, PR needs, and event statistics. 	<ul style="list-style-type: none"> • Room Reserve provides tools for: <ul style="list-style-type: none"> ➢ Managing rooms. ➢ Advanced costing. ➢ Equipment inventory tracking. ➢ Customizing Reservation Forms. ➢ Reporting room and equipment schedules, and utilization statistics.
<ul style="list-style-type: none"> • Library staff have the ability (based on security level) to: <ul style="list-style-type: none"> ➢ Configure the system. ➢ Add, modify, and delete events. ➢ Register patrons. ➢ Access reporting tools. 	<ul style="list-style-type: none"> • Library staff have the ability (based on security level) to: <ul style="list-style-type: none"> ➢ Configure the system. ➢ Assist patrons with reservations. ➢ Accept or deny reservations. ➢ Post fee and deposit payments. ➢ Access reporting tools.
<ul style="list-style-type: none"> • Patron access is limited to: <ul style="list-style-type: none"> ➢ Viewing the event calendar. ➢ Registering for events. ➢ Subscribing to e-mail notifications and reminders. 	<ul style="list-style-type: none"> • Patron access is limited to: <ul style="list-style-type: none"> ➢ Viewing the reservation calendar. ➢ Submitting reservation requests for rooms or equipment.
<ul style="list-style-type: none"> • The spaces where events are held: <ul style="list-style-type: none"> ➢ Are called "Locations". ➢ Are not profiled in the system (i.e., no details about room capacity and features). 	<ul style="list-style-type: none"> • The spaces where meetings are held: <ul style="list-style-type: none"> ➢ Are called "Rooms". ➢ Are profiled in the system (i.e., profiles include room capacity and features).
<ul style="list-style-type: none"> • Holidays and other closings are managed by Events when Events: <ul style="list-style-type: none"> ➢ Is a standalone application. ➢ Works with Room Reserve. 	<ul style="list-style-type: none"> • Holidays and other closings are managed by Room Reserve when Room Reserve: <ul style="list-style-type: none"> ➢ Is a standalone application.

What Happens When They Work Together

When Events and Room Reserve are partnered:

- Room reservations appear on the Events calendar at the discretion of the library. Both Room Reserve and Events recognize reservation conflicts regardless of a reservation's appearance on the Events calendar.
- Events that use rooms configured in Room Reserve always appear on the Room Reserve calendar.
- Locations created in Events are not available to Room Reserve, unless they are configured as rooms in Room Reserve.
- User's can reserve a Room Reserve room from the Event Template in Events.
- When Events and Room Reserve are partnered, Events assumes custody of holiday and closing functions.