



SirsiDynix Symphony 3.2

Materials Booking Training Guide

DOC-MBTGEN-S

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Introduction

The Materials Booking module allows library materials to be reserved for future use. This differs from placing a hold, which reserves library materials for use as soon as they become available. Instead, booking an item reserves it for a specified period, and leaves it free for other patrons to use until that specified (booked) time.

The entire booking cycle, from staff preparation of booked items—through the delivery of booked items to users, the actual use, and the return of the booked items—to the post-use cleanup of booked items is scheduled and tracked through SirsiDynix Symphony.

Who should attend?

This course is intended for Materials Booking managers, system managers, and other Materials Booking staff.

Prerequisite

SirsiDynix Symphony Essential Skills – This training course introduces SirsiDynix Symphony WorkFlows. This course teaches basic skills including navigating WorkFlows, searching techniques, keyboard navigation, and using the Help file.

Course Objectives

- Create new bookings
- Check out and check in bookings
- Display and modify bookings
- Remove bookings
- Schedule reports to automate the process of listing and removing bookings
- Understand materials booking policies

Materials Booking Considerations

Before offering any booking services, all libraries must complete prerequisite planning and configuration tasks. These day-to-day operations involve booking, locating, and delivering library materials to library users, and these tasks must be reflected in the policies. You must prepare SirsiDynix Symphony catalog, item, and user records for use with the Materials Booking module.

Library Planning Prerequisites

Library staff should consider the needs of its users and the resources available to meet those needs when discussing the following items:

- Library materials eligible for booking
- Processing and shipping time required for various item types
- Delivery methods for library materials and equipment
- Availability of library staff for preparation and cleanup
- Users that are eligible for materials booking services

These are your most important Materials Booking considerations:

- **Limit Materials to be Booked.** You may decide that certain materials will not be bookable for some or all users. Though circulation policies will usually be sufficient to prevent booking of restricted-use items, such as reference works, you may choose to limit or disallow booking of certain item types through other policies. For example, faculty and staff may book meeting rooms, but no one may book maps.
 - **Limit User Eligibility for Booking Services.** You will need to determine eligibility criteria for booking services. One library might decide that any registered user may book items. Another library may wish to limit booking services to a given user population. The Booking Limit attribute in the User Profile policy determines whether a user group can book library materials.
 - **Establish Pre- and Post-use Processing Time.** Certain materials may require preparation before releasing them to the user. For example, a reel-to-reel projector should be fitted with an empty spool, and secured on the transport cart before user pickup.

A conference room should be arranged with a microphone, a projector and screen, and extra chairs, if requested by the user. The Preparation Time attribute in the Booking Profile

policy determines the amount of time needed to prepare a booked item or group of items for use.

The Cleanup Time attribute in the Booking Profile policy determines the amount of time needed to process a booked item or group of items after use.

- **Coordinate Staff Availability.** The availability of staff may determine whether certain items can be booked at particular times. For example, if your staff needs 30 minutes to clean a meeting room, you may decide to stop bookings within half an hour from the library's closing time.
- **Establish Delivery Methods.** The way in which booked library materials are distributed to users directly affects the structure of the Booking Profile policies and Shipping Schedule policies. For example, if the library requires users to pick up all booked items, you will not need to create shipping schedules in the booking profiles. If a library will ship materials to users, either via library vehicle or commercial carrier, you will need to create one or more shipping schedules to specify pickup and delivery times.
- **Determine Off-site Transit.** The way in which booked library materials are distributed to users directly affects the structure of the Booking Profile policies and Shipping Schedule policies. For example, if the library requires users to pick up all booked items, you will not need to create shipping schedules in the booking profiles. If a library will ship materials to users, either via library vehicle or commercial carrier, you will need to create one or more shipping schedules to specify pickup and delivery times.
- **Determine Fees for Services.** SirsiDynix Symphony permits a great deal of flexibility in determining which, if any, booking services will charge a fee. Libraries may elect not to pass any charges to their users or may recover costs by assessing a privilege fee for booking services for some or all users, passing along shipping costs or assessing a per charge fee.

Materials Booking Toolbar and Wizards

The Materials Booking module gives you a way to manage your library's nonbibliographic materials, such as audio-visual equipment or conference rooms. Materials Booking wizards reserve library materials for future use.

Booking toolbar

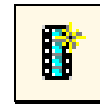


Create a Booking

The Create Bookings wizard will allow you to reserve library materials for a date and time up to two years in the future.

Create a booking for a single item

To create a booking for a single item for a user, complete the following steps:



1. Click the **Create Bookings** wizard.
2. Scan the user's ID or type the user's ID and click **Get User Information**.

If you do not have the user's ID, use the User Search helper to search for the user and click Create Booking. The helper will automatically fill in the user ID box with the ID you select.

Create Bookings

User ID: 50764010035194 Goslin, Jamie L. Profile name: FACULTY...

Item information

Identify user

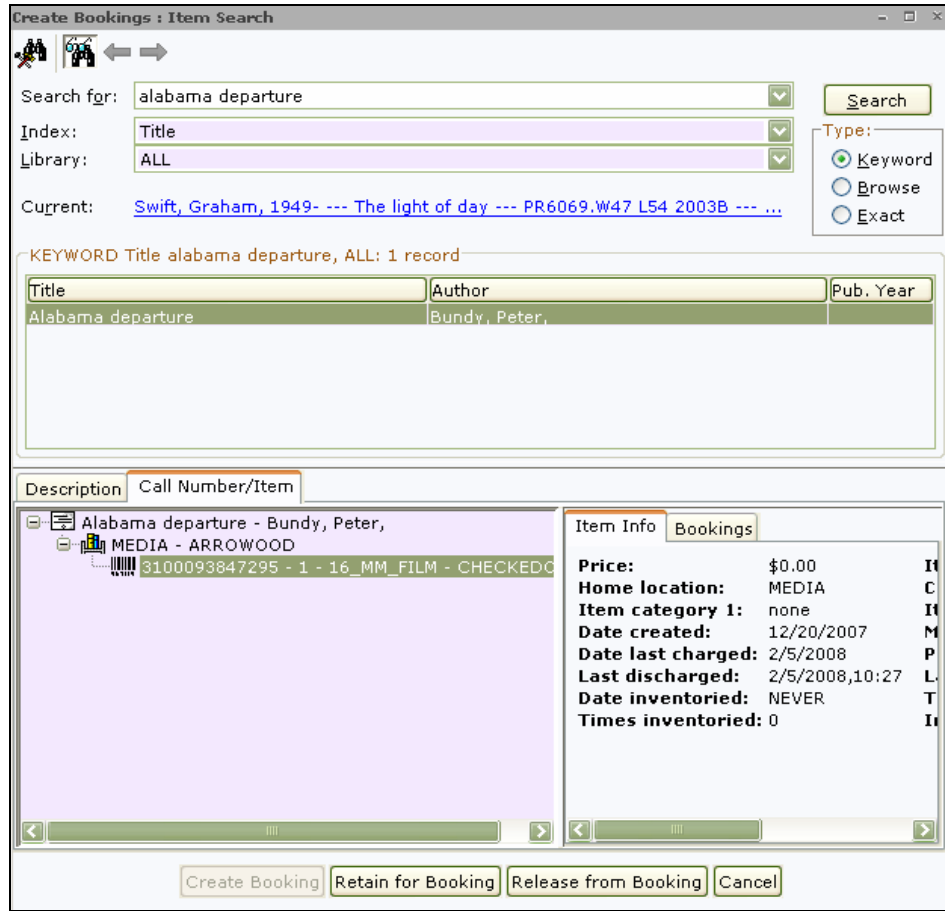
User ID: 50764010035194

Identify item

Item ID:

3. Scan the barcode of the item or type the item's ID and click **Get Item Information**.

If needed, use the item search helper to bring up a title or a list of titles. Once you have selected the item from the list, first click Retain for Booking, then click Create Booking.



4. On the **Calendar** tab, select the start date and end day for your booking using the calendar or the gadget next to the Start Day field.

Create Bookings : Assign Patron Booking Period

Alerts

User ID: 50764010035194 Goslin, Jamie L. Profile name: FACULTY...

Alabama departure / Bundy, Peter
 MEDIA Copy:1 ID:3100093847295

Calendar

Start day (MM/DD/YYYY): End day (MM/DD/YYYY):

Start hour: End hour:

Start minute: End minute:

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5. Using the dropdowns, select the start and end hour and minute.
6. Click **Create Booking**.
7. On the **Booking Info** tab, select a pickup library in the **Pickup At** box. If no pickup library is selected, the user's library will be set as the pickup library by default. The pickup library option will not appear on a single-library system.

Create Bookings : Booking Confirm

User ID: 50764010035194 Goslin, Jamie L. Profile name: FACULTY...

Alabama departure / Bundy, Peter.
MEDIA Copy:1 ID:3100093847295

Booking Info

Title/Author:

| | | | |
|------------------------|----------------------|----------------------|----------------|
| User name: | Goslin, Jamie L. | User ID: | 50764010035194 |
| Alt ID: | | | |
| Job ID: | | Media desk: | ARROWOOD... |
| Pickup at: | <input type="text"/> | Created: | |
| Item type: | 16_MM_FILM... | Item ID: | 3100093847295 |
| Call number: | MEDIA | Copy: | 1 |
| Booking profile: | AV... | | |
| Prep time: | 15M | Clean up: | 15M |
| Patron booking starts: | 2/5/2008,11:00 | Patron booking ends: | 2/5/2008,15:00 |
| Start preparation: | 2/5/2008,10:45 | Cleanup ends: | 2/5/2008,15:15 |

8. Click **Create Booking**.
9. After the booking has been created, select one of the following options:
 - Add Extended Info to allow you to create a note or comment about the booking.
 - Make More Changes to modify the record you just created.
 - Create Another Booking to create another booking for the same user.
 - Create Recurring Booking to create a booking of the same material at the same day and time for a specific period.
 - Close to exit the wizard



Note: Group booking is not available in the Java client of WorkFlows.
It is, however, available in the C client.

Create Booking Properties

The Create Booking wizard contains properties to determine what is seen within the creation process. Use the defaults tab to set up the following:

- The number of months displayed at one time.
- The start and end hour and minute.
- The pickup library.

The screenshot shows a dialog box titled "Create Bookings : Set Properties" with a close button (X) in the top right corner. Below the title bar, there is a label "Display property page:" followed by two radio buttons: "Wizard Startup" (unselected) and "Never" (selected). Below this is a tabbed interface with the "Defaults" tab selected. The "Defaults" tab contains two sections: "Calendar Options" and "Booking Defaults".

Calendar Options

| | | | |
|-------------------|--|-------------|--|
| Number of months: | <input type="text" value="3"/> | | |
| Start hour: | <input type="text" value="10"/> <input type="button" value="v"/> | End hour: | <input type="text" value="17"/> <input type="button" value="v"/> |
| Start minute: | <input type="text" value="00"/> <input type="button" value="v"/> | End minute: | <input type="text" value="00"/> <input type="button" value="v"/> |

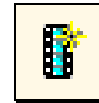
Booking Defaults

| | |
|-----------------|---|
| Pickup library: | <input type="text"/> <input type="button" value="v"/> |
| Media desk: | <input type="text"/> <input type="button" value="v"/> |

At the bottom of the dialog box are two buttons: "OK" and "Cancel".

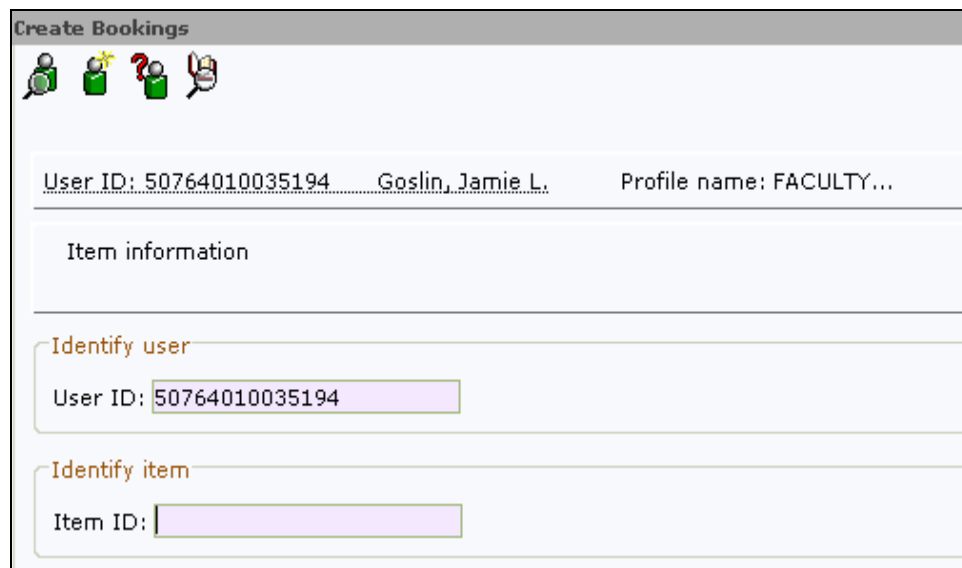
Create a recurrent booking

A user may need to book the same item for the same day at the same time for a set period of time. For example, a user may need to book a meeting room every Thursday from 10 in the morning until noon for the next month. To create a recurrent booking of one item for a user, complete the following steps:



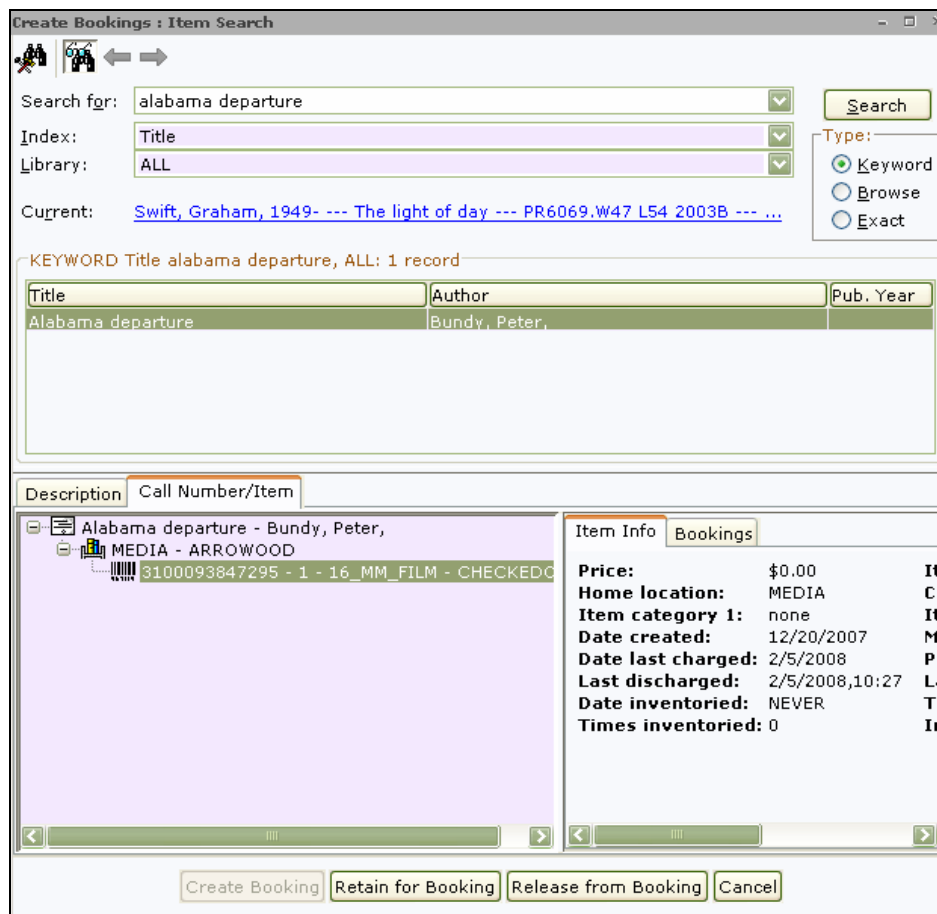
1. Click the **Create Bookings** wizard.
2. Scan the user's ID or type the user's ID and click **Get User Information**.

If you do not have the user's ID, use the User Search helper to search for the user and click Create Booking. The helper will automatically fill in the user ID box with the ID you select.

A screenshot of a web application window titled "Create Bookings". The window has a grey header bar with the title. Below the header, there are four small icons: a person, a calendar, a question mark, and a hand. The main content area is divided into several sections. The first section shows "User ID: 50764010035194", "Goslin, Jamie L.", and "Profile name: FACULTY...". Below this is a section labeled "Item information". The next section is titled "Identify user" and contains a text input field with "User ID: 50764010035194". The final section is titled "Identify item" and contains a text input field with "Item ID:". The input fields have a light purple background and a thin border.

3. Scan the barcode of the item or type the item's ID and click **Get Item Information**.

If needed, use the item search helper to bring up a title or a list of titles. Once you have selected the item from the list, first click Retain for Booking, then click Create Booking.



4. On the **Calendar** tab, select the start date and end day for your booking using the calendar or the gadget next to the Start Day field.

Create Bookings : Assign Patron Booking Period

User ID: 50764010035194 Goslin, Jamie L. Profile name: FACULTY...

Alabama departure / Bundy, Peter,
 MEDIA Copy:1 ID:3100093847295

Calendar

Start day (MM/DD/YYYY): End day (MM/DD/YYYY):

Start hour: End hour:

Start minute: End minute:

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| 23 | 24 | 25 | 26 | 27 | 28 | 29 |
| 30 | 31 | | | | | |

5. Using the dropdowns, select the start and end hour and minute.
6. Click **Create Booking**.
7. On the **Booking Info** tab, select a pickup library in the **Pickup At** box. If no pickup library is selected, the user's library will be set as the pickup library by default. The pickup library option will not appear on a single-library system.

Create Bookings : Booking Confirm

User ID: 50764010035194 Goslin, Jamie L. Profile name: FACULTY...

Alabama departure / Bundy, Peter.
 MEDIA Copy:1 ID:3100093847295

Booking Info

Title/Author:

| | | | |
|------------------------|-------------------------------|------------------------|----------------|
| User name: | Goslin, Jamie L. | User ID: | 50764010035194 |
| Alt ID: | | Media desk: | ARROWOOD... |
| Job ID: | | Created: | |
| Pickup at: | <input type="text" value=""/> | Item type: | 16_MM_FILM... |
| Item type: | 16_MM_FILM... | Item ID: | 3100093847295 |
| Call number: | MEDIA | Copy: | 1 |
| Booking profile: | AV... | Clean up: | 15M |
| Prep time: | 15M | Patron booking starts: | 2/5/2008,11:00 |
| Patron booking starts: | 2/5/2008,11:00 | Patron booking ends: | 2/5/2008,15:00 |
| Start preparation: | 2/5/2008,10:45 | Cleanup ends: | 2/5/2008,15:15 |

8. Click **Create Booking**.
9. After the booking has been created, click on the **Create Recurrent Bookings** option.

WF Create Bookings: Complete ✖

Booking created

10. Select the start and end date and time for the first recurrence on the **Calendar** tab and click **Add to List**.

The date selected will show as black text on the calendar.

Create Bookings : Assign Patron Booking Period

Alerts

User ID: 50764010035194.....Goslin, Jamie L. Profile name: FACULTY...

Alabama departure / Bundy, Peter,
MEDIA Copy:1 ID:3100093847295

Calendar Recurrent Bookings

Start day (MM/DD/YYYY): End day (MM/DD/YYYY):

Start hour: End hour:

Start minute: End minute:

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| 23 | 24 | 25 | 26 | 27 | 28 | 29 |
| 30 | 31 | | | | | |

11. Continue to add recurrences as desired using the calendar or the gadgets next to the **Start day** and **End day** fields.
12. Once all of the dates have been selected, click on the **Recurrent Bookings** tab to review the list of recurrent bookings to be created.

Create Bookings : Assign Patron Booking Period

Alerts

User ID: 50764010035194 Goslin, Jamie L. Profile name: FACULTY...

Alabama departure / Bundy, Peter.
MEDIA Copy:1 ID:3100093847295

Calendar Recurrent Bookings

List of Recurrent Dates

| Patron Booking St... | Patron Booking Ends | Start Preparation | Cleanup Ends | Error |
|----------------------|---------------------|-------------------|-----------------|-------|
| 2/12/2008,11:00 | 2/12/2008,15:00 | 2/12/2008,10:45 | 2/12/2008,15:15 | |
| 2/19/2008,11:00 | 2/19/2008,15:00 | 2/19/2008,10:45 | 2/19/2008,15:15 | |
| 2/26/2008,11:00 | 2/26/2008,15:00 | 2/26/2008,10:45 | 2/26/2008,15:15 | |

Add to List Remove from List Create Recurrent Bookings Create Another Booking Close

13. Once the list has been reviewed select **Create Recurrent Bookings**.

14. Select **Create Another Booking** or **Close**.

Check In and Check Out Bookings

Checking out and checking in a booked item is very similar to checking out and in a regular circulating item in your collection. The Checkout Bookings and Discharge Bookings wizards will allow you to checkout and check in booked items for users.

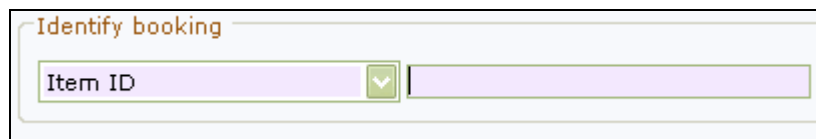
Checkout a booked item

To checkout booked items to a library use, complete the following steps:



1. Click the **Checkout Bookings** wizard.
2. Select User ID in the Identify Booking dropdown and scan the user's ID or type the user's ID and click **Get Booking**.

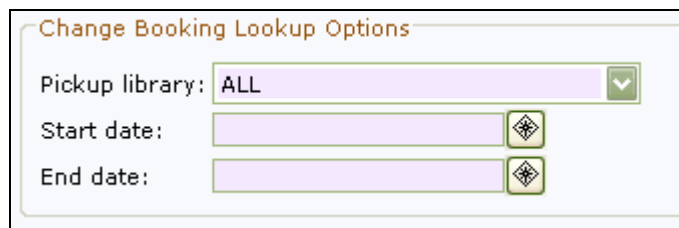
To identify the item instead of the user, select Item ID in the Identify Booking dropdown and scan the item ID or type the item's ID and click **Get Booking**.



The screenshot shows a form titled "Identify booking" with a dropdown menu set to "Item ID" and an adjacent text input field.

3. The list of bookings associated with your criteria will appear.

With Change Booking Lookup Options you can further filter what displays on the booking list. The Change Booking Lookup Options will be grayed out if the search was done by Job ID.



The screenshot shows a form titled "Change Booking Lookup Options" with three fields: "Pickup library:" with a dropdown menu set to "ALL", "Start date:" with a date picker, and "End date:" with a date picker.

For more detailed information about each booking click the glossary in the Patron Booking Starts or Patron Booking Ends columns.

Checkout Bookings : Glossary

Title/Author: Alabama departure/Bundy, Peter,

User name: Goslin, Jamie L. User ID: 50764010035194

Alt ID:

Job ID: BKG1-132 Media desk: ARROWOOD...

Pickup at: ARROWOOD... Created: 2/5/2008

Item type: 16_MM_FILM... Item ID: 3100093847295

Call number: MEDIA Copy: 1

Booking profile: AV...

Prep time: 15M Clean up: 15M

Patron booking starts: 2/12/2008,11:00 Patron booking ends: 2/12/2008,15:00

Start preparation: 2/12/2008,10:45 Cleanup ends: 2/12/2008,15:15

- Use the check boxes to select a booking or bookings for checkout, or select **Checkout All** to checkout all bookings at once then click **Check Out Booking**.

Checkout Bookings

User ID: 50764010035194 Goslin, Jamie L. Profile name: FACULTY...

Identify booking

User ID:

Change Booking Lookup Options

Pickup library:

Start date:

End date:

List of bookings; User ID: 50764010035194; Pickup library: ALL; 4 records

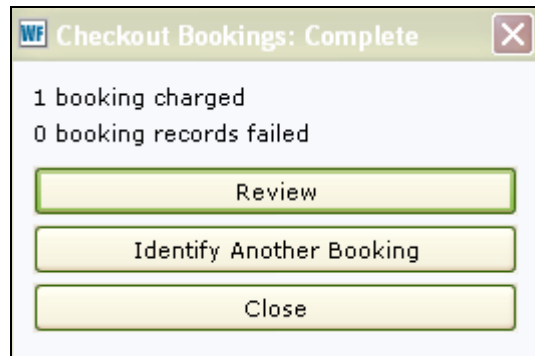
Checkout All

| Check Out | Title | Pickup Lib... | Item Library | Patron Bo... | Patron Bo... | Start Prep... | Cleanup E... |
|-------------------------------------|---------------|---------------|--------------|----------------|----------------|----------------|----------------|
| <input checked="" type="checkbox"/> | Alabama de... | ARROWOOD | ARROWOOD | 2/5/2008,11... | 2/5/2008,15... | 2/5/2008,10... | 2/5/2008,15... |
| <input type="checkbox"/> | Alabama de... | ARROWOOD | ARROWOOD | 2/12/2008,1... | 2/12/2008,1... | 2/12/2008,1... | 2/12/2008,1... |
| <input type="checkbox"/> | Alabama de... | ARROWOOD | ARROWOOD | 2/19/2008,1... | 2/19/2008,1... | 2/19/2008,1... | 2/19/2008,1... |
| <input type="checkbox"/> | Alabama de... | ARROWOOD | ARROWOOD | 2/26/2008,1... | 2/26/2008,1... | 2/26/2008,1... | 2/26/2008,1... |

List of checkouts

| Title | Item ID | Date Due | Billed | Amount Paid... | Type | Record Status |
|-------|---------|----------|--------|----------------|------|---------------|
| | | | | | | |

5. After you have checked out the items to the user, select one of the following options:
- Review to review the current checkout
 - Identify Another Booking to check out to another user.
 - Close to exit the wizard.



Note: Because the procedure for checking out a booked item is the same as a regular checkout, you can use the Checkout wizard. If the user checks out the booked item on time (that is, before the booking end time), the item charge is associated with a booking record.

Checkout Booking Properties

The Checkout Bookings wizard contains properties to facilitate the checkout process. Use the defaults tab to set up the following:

- Preferred search index
- Pickup library
- Start date and end dates

The screenshot shows a dialog box titled "WF Checkout Bookings : Set Properties" with a close button (X) in the top right corner. Below the title bar, there are two radio buttons for "Display property page": "Wizard Startup" (unselected) and "Never" (selected). The main area is divided into several sections:

- Automatic Payment Defaults:** Contains two dropdown menus. "Payment type:" is set to "CREDITACCT" and "Credit reason:" is set to "AUTOPAY".
- Identify Booking Search Preferences:** Contains a dropdown menu for "Preferred search index:" set to "Item ID".
- Booking Lookup Preferences:** Contains a dropdown menu for "Pickup library:" set to "ALL", and two date pickers for "Start date:" and "End date:".
- Checkout All or Selected Bookings:** Contains a checkbox labeled "Checkout All" which is currently unchecked.

At the bottom of the dialog box are two buttons: "OK" and "Cancel".

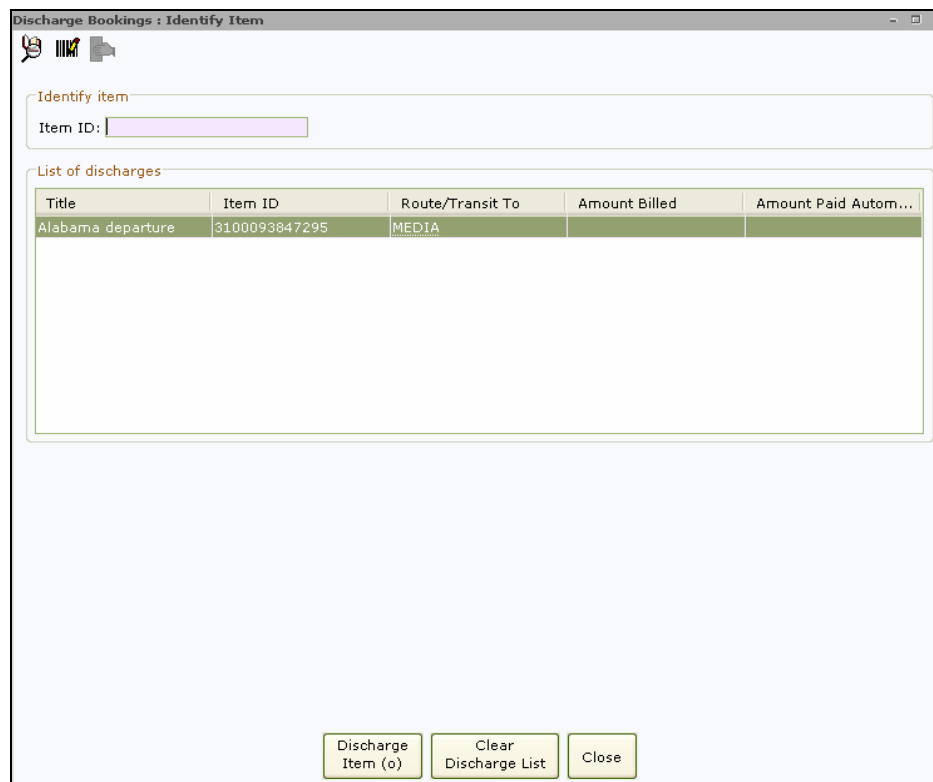
Check in a booked item

To check in booked items returned by the library user, complete the following steps



1. Click the **Discharge Bookings** wizard.
2. In the Item ID box, scan the item's ID or type in the item ID and click the **Discharge Item** button.

If the properties for the Discharge Bookings wizard are set to display the current item, click the Current information link to access the last record displayed, modified, or added.



The screenshot shows a window titled "Discharge Bookings : Identify Item". It contains a section labeled "Identify item" with an "Item ID:" text box. Below this is a section labeled "List of discharges" containing a table with the following data:

| Title | Item ID | Route/Transit To | Amount Billed | Amount Paid Autom... |
|-------------------|---------------|------------------|---------------|----------------------|
| Alabama departure | 3100093847295 | MEDIA | | |

At the bottom of the window are three buttons: "Discharge Item (o)", "Clear Discharge List", and "Close".

3. Repeat until all items are discharged.
4. After discharging items, select one of the following options:
 - Clear Discharge List to clean the screen of previous checked in items.
 - Close to exit the wizard.

Note: When an item has a Booking Profile policy that specifies a cleanup time, and the booked item is discharged before the end of its booking period, the item is considered charged out to the library user of the booking. This ensures that the item is unavailable during its booking time.
