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Getting Started with Materials Booking

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Getting started with Materials Booking

Version 17

Susan Dow and Jennifer Murray
Cobleskill, New York
October 5, 2007

About UB Libraries

- Libraries serve a clientele of over 26,000 students in undergraduate, graduate, professional and doctoral programs.
- Libraries serve the needs of over 1600 full-time faculty members.
- Our libraries include the Arts & Sciences Libraries, the Health Sciences Library, the Music Library and the Law Library.
- We implemented most modules of version 17 of Aleph during the Spring and summer of 2006. Expect to input version 19 in 2008.
- In Aleph we have 16 sub-libraries and items can be checked out in and out at 10 of these libraries.
- We are currently running the booking module in test only.

Multimedia Centers

There are 3 multimedia centers in the
Libraries.

- **Health Sciences Library**
- **Law Library – Koren AV Center**
- **Arts & Sciences Libraries**

All multimedia centers are considered sub-libraries in Aleph and maintain their own circulation policies.

All centers contain a mix of media. The Health Sciences Library and the Law Library reserve rooms for media viewing. In addition, the Law Library schedules, provides equipment and sets-up equipment for law school classrooms and special events for university libraries.

What is Materials Booking?*

- Materials booking allows a patron to request an item for use during a specific time period.
- Can be used for any type of material including equipment.
- Can be used for scheduling rooms.
- Differs from a hold request; a booking request has priority over all other requests for materials not in circulation.

Also referred to as rolling booking in version 18 of Aleph

What is Advanced Booking? (we will not be covering)

- **Request is like a hold request – used instead of.**
- **Uses hold request permissions and settings.**
- **Need to define a separate item status.**
- **Time slots are fixed.**
- **Once created it is managed like a materials booking request.**
- **Not using “Advanced Booking” at this time.**

Implementation of Booking Module

- Library Systems Implementation Team (LSIT)
- Director of Access Services for Arts & Sciences Library
- System Programmer
- Project Leader
- Representatives from all libraries

Why we want to use Booking Module

- Currently each multimedia center uses their own method for loaning equipment and media:
  - HSL Media Center: keeps a list of who needs what, when and then loans the media when needed. Item records are in Aleph for videos and DVDs.
  - Law Koren AV Center: uses spreadsheets and customized slips to loan equipment and media. There are currently no item records for equipment in Aleph so the Koren Center handles this separately.
- We want to be able to keep better track of equipment and media.
- We want to minimize number of steps, paper and use one system.
- We want to provide outreach to other organizations on campus that might find booking useful for the needs of their clientele.

GOAL
Reduce Paper and Increase Efficiency

AV–Koren Center
Equipment Reservation Checklist

Please use this form to obtain all of the following information before recording equipment reservations on the AV–Koren Equipment Schedule Clipboard. When transferring this information to the clipboard, please be sure to include all the information in the proper time slot on the sheet for the date requested. A Classroom Equipment Signout slip should also be completed at the same time and placed in the Clipboard with the appropriate day. After the reservation information is logged onto the clipboard, place this form in the Reservations Folder on the GA's desk.

_____ date: _____

_____ start time: _____ (circle one) a.m. p.m.

_____ end time: _____ (circle one) a.m. p.m.

_____ room number: _____ or patron pick–up: _____

_____ equipment type: _____

_____

_____

_____

_____ accessories: _____

_____

_____

_____

_____ media title: _____

_____

_____ media title supplied by : (circle one) AV–Koren Center Patron

_____ class, seminar or special–program title:

_____

_____

_____ name and telephone number of contact person:

_____

_____

_____ professor's name where applicable: _____

_____ user is (circle one): Faculty Ph.D. UG/MA/LAW

Special Borrowers Departmental

_____ your initials: _____

CLASSROOM EQUIPMENT SIGNOUT

DATE_____ DAY_____

START TIME _____am or pm END TIME _____am or pm

ROOM NUMBER _____ or PICKUP _____

EQUIPMENT/ACCESSORIES _____

_____

_____

_____

MEDIA TITLE _____

SUPPLIED BY (circle one): KOREN PATRON

CLASS/SEMINAR/EVENT _____

NAME/PHONE _____

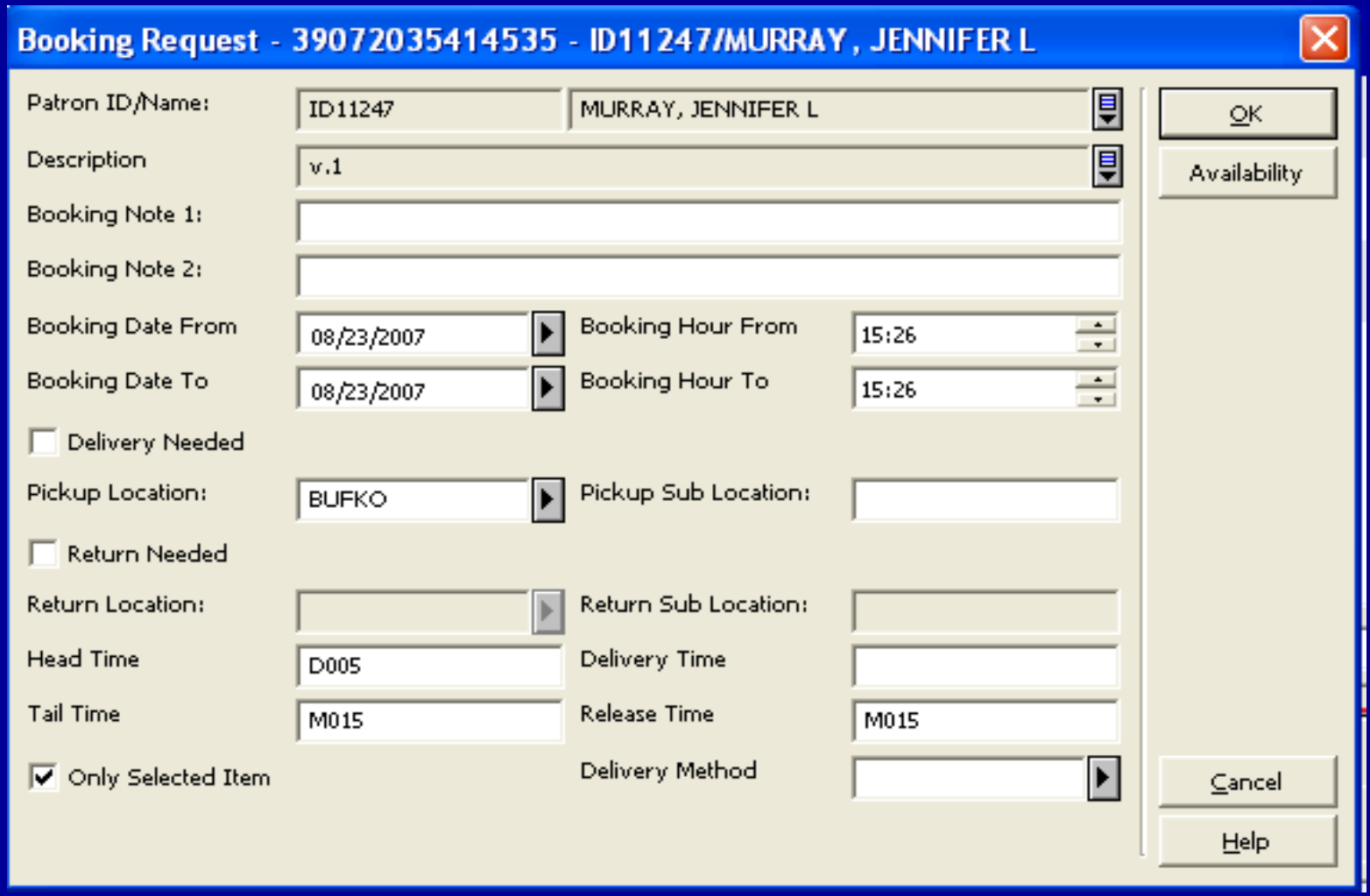
USER IS: Faculty Ph.D. UG/MA/LAW

Special Borrowers Departmental

ATTENDANCE _____ INITIALS _____

*** Slips are also used for statistics gathering**

Booking Request form in GUI



Aleph Booking Module

- Items, including equipment, need to be barcoded and temporary records need to be created if materials are not in Aleph. We have configured Aleph so that temporary records created by circulation are not visible to the pubic.

- When creating a request the item must be available. It cannot:
  - be on loan
  - on the hold shelf
  - booked by another patron
  - in the process of reshelving

- Module will print daily booking delivery slips which can be used to track equipment set-ups.

- A schedule of booking requests can be printed on a predetermined basis using a filtering option.

- Currently booking materials using departmental accounts rather than user accounts.

Observations

- We will not be allowing booking via the OPAC. We want to control the booking requests for now. Eventually we will work on allowing patrons to place booking requests via the OPAC. (Note: If you have the placeholder for booking in www_f_eng/item-global-body it will appear in the OPAC as soon as you set up the tables for booking). We took it out for the time being.

- Although each media center maintains its own policies concerning scheduling and use of equipment, it may be necessary to review circulation policies in light of the implementation of booking.

- We are still in the testing stage and it is time consuming for media centers to maintain two record keeping systems while we fully test the Aleph booking module to determine if we wish to fully implement.

Next Steps

- Move the booking system from test to production.
- Use the booking system to reserve conference and study rooms.
- Implement the advanced booking system for rooms that are reserved for specific time periods.
- Allow users to make booking requests from the OPAC.
- Explore the feasibility of allowing other campus offices to use the booking module.

Getting started with Booking…
Tables

- user_function.eng
- tab31
- tab15.eng
- tab16
- tab100
- tab_hold_request
- tab_booking
- tab14 – not exactly related to booking but need to look at
- tab37_booking_pickup
- tab37_booking_delivery
- tab_delivery_location.eng
- tab27
- tab18.eng

*** These tables are all in the ADM library's $data_tab except user_function.eng which is in $alephe_tab.**

user_function.eng

- Define staff booking permissions:

CIRCULATION	L Circulation	BOOKING-VIEW	L Booking request - View
CIRCULATION	L Circulation	BOOKING-UPDATE	L Booking request - Update
CIRCULATION	L Circulation	BOOKING-CREATE	L Booking request - Create
CIRCULATION	L Circulation	BOOKING-OVERIDE	L Booking request - Override Blocks
CIRCULATION	L Circulation	BOOKING-DELETE	L Booking request - Delete
CIRCULATION	L Circulation	BOOKING-DELIVER	L Booking Request - Deliver

tab31

- Define who can book:
  - Columns 20 and 21 are relevant

```
! COL 20. 1; ALPHA {Y,N}, UPPER; ;
!         Item Booking permission;
!         Item Booking permission;
! COL 21. 1; ALPHA {Y,N}, UPPER; ;
!         Booking - Ignore closing Hours;
!         Booking - Ignore closing Hours
!         A patron that has Y in this permission will not be restricted
!         by library open hours, and will have his booking requests
!         held for him even after the release period;
```

tab15.eng

- Define the reloaning limit:
  - Column 15 is relevant

```
! COL 15.  2; NUM; ;
!         Reloaning limit;
!         Reloaning limit: The value denotes the number of hours during
!         which the same copy of an item cannot be reloaned or rebooked to the same patron
!         counting from the time he returned it, or from the
!         end time of a booking. The values "00" or
!         "  " (blanks) should be used for unrestricted reloaning.;
```

tab15.eng (con't)

- Define what items can be booked and when they can be booked:
  - Columns 16 and 17 are relevant

```
! COL 16.  1; ALPHA (Y,N,C), UPPER; ;
!          Booking permission;
!          Y - Booking is possible
!          N - Booking is not possible
!          C - Booking permission is conditional on the patron's local booking
!              permission (Z305-BOOKING-PERMISSION);
! COL 17.  1; ALPHA (A,O,C), UPPER; ;
!          Booking hours;
!          A - Booking is possible at all times (both open and closed hours)
!          O - Booking is possible only during open hours
!          C - Booking is possible only during closed hours;
```

tab16

- Define maximum number of booking requests:
  - Col. 26 is relevant

```
!  COL 26. 3; NUM; ;
!          Max no. booking requests;
!          Max number of booking requests
!          The maximum number of booking requests a patron is allowed
!          to have.
!          We use 999 to indicate unlimited number of requests.;
```

- Maximum booking period
  - a request can not be longer than the maximum period that the item would have been loaned. Columns 5,6,8,9 for regular items and columns 15,16,17,18 for requested items set this max. period.

tab100

- Like Item Policy
  - Defining what items are like items is important for calculating item availability. In addition to the same material type and enumerations one of the following parameters must be setup to be considered “like”:
    - SUB-LIBRARY-DIVISION
    - HOLD-REQUEST-ITM-STATUS
    - HOLD-REQ-PROCESS-STATUS
    - HOLD-REQUEST-COLLECTION
  - By setting any of the above parameters to “Y” means two items must have the same (sub-library, item status, process status, or collection) to be considered like.

tab100 (con't)

- First booking parameter:
  - Delivery Time on the booking request form. If you leave it blank when submitting the request this default is used.

```
!# BOOKING-DELIVERY-TIME
!# Values:  Default: M000
!# Type: Text;    Max Length: 04
!# tab100 of library: Yes;  tab100_<server_type>: No.
!
!  Defines the delivery time that will be added to a
!  booking request that is required for delivery. The value
!  is a three digit number that can express minutes, hours, days
!  or weeks, depending on the variable prefix.
```

tab100 (con't)

- Second booking parameter:
  - If loan is made from the loan tab and the loaning patron has a booking request that is not in the preview period, this parameter will set the system behavior.

```
!# OVERLAP-BOOKING
!# Values:  Default: 01
!# Type: Text;    Max Length: 02
!# tab100 of library: Yes;  tab100_<server_type>: No.
!
!                     +++++++ booking period ++++
!                     |                         |
!    |----------------|------|-----------------|
!   8:00            12:00  13:00              18:00
!    |                       |
!    ++ desired loan period ++
!
!    01 = Extend loan until end of Booking Period (default).
!    02 = Delete booking request; execute loan regularly (accept system-
!         suggested due date).
!    03 = GUI functionality: Allow staff to choose between options 01 and
!                            02
!         Self check and X-Server: the same as option 01.
!    04 = GUI functionality: the same as option 03 (for GUI).
!         Self check and X-Server: the same as option 02.
```

tab_hold_request

- Define when booking request checks are performed:
  - **BK-PRE**: is used for the ‘booking’ link when list of items is displayed in the OPAC.
  - **BK-POST**: is used when submitting a booking request form in the OPAC.
  - **BK-CIRC**: is used when a request is submitted in the circulation client.

- Examples of checks:
  - **booking_a**: Item can not be booked if tab15.eng col. 16 = N. (PRE,CIRC)
  - **booking_h**: Checks maximum number of booking requests per sub-library and item status. (POST,CIRC)

tab_booking

- Head/tail times for item booking
  - For each combination of sub-library, item status and material type you define:
    - Head Time – the time added to the beginning of the request.
    - Tail Time – the time added to the end of the request.
    - Release Time – the time after which a requested item is released and available to other patrons.
    - Delete Interval - amount of time before a request start time in which the patron can still delete the request.
    - Max advanced starting-date - how far into the future bookings can be made.
    - Preview Period - how much time in advance a booking can be executed.

```
! 1    2   3     4    5   6    7    8    9
!!!!!-!!-!!!!!-!!!!-!!!!-!!!!-!!!!-!!!!-!!!!
BUFHM 08 ##### D010 M015 D002 H001 M004 H001
```

tab14

- You need to make sure the reshelving time is shorter than the head time in tab_booking.

- If an item that has a booking request is currently out on loan you want it returned and reshelved in less time then the head time.

tab37_booking_pickup

- Booking Requests Pick-up List Configuration
  - Define drop-down list of pickup locations (dependent on item status, item process status, patron status and sub-library of item).
  - These locations must be valid sub-libraries in tab_sub_library.eng

tab37_booking_delivery

- Booking Requests Delivery List Configuration
  - Define drop-down list of pickup locations (dependent on item status, item process status, patron status and sub-library of item).
  - These delivery locations must *not* be valid sub-libraries in tab_sub_library.eng. They must be valid locations in tab_delivery_locations.eng.

tab_delivery_locations.eng

- List of delivery locations
  - Example:

```
! 1        2                                3
!!!!!-!!!!!!!!!!!!!!!!!!!!!!!!!!!!!!!!!-!!!!!!!!!!!!!!!!>
CLASS Classroom delivery                  120 Capen Hall
```

tab18.eng

- Relevant cash transactions for booking:
  - 0091 – Booking Request Created
  - 0092 – Booking Request Filled (loaned)
  - 0093 – Booking Request Delivered
  - 0094 –Booking Request not filled (not picked up)
- These can be active or non-active.

tab27

- Hold and Booking Requests Send Method Configuration
  - For booking requests: how the item is to be handled when it is delivered.
  - NOTE: we have not been able to get ’07’ to work.

```
!         06 for booking requests. When the item is delivered it will be
!            automatically loaned to the patron
!         07 for booking requests. When the item is delivered it is put in transit
!            to the pickup location.;
```

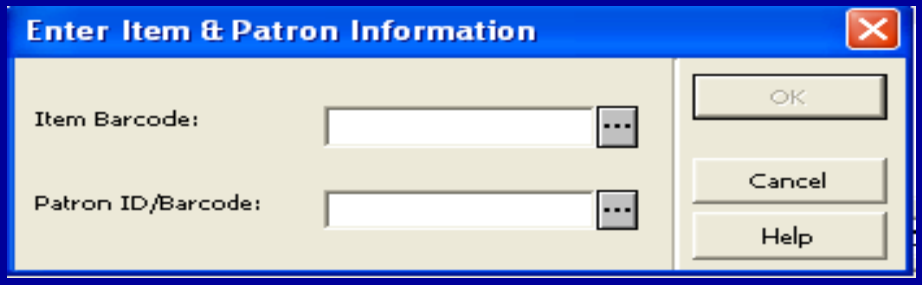
Recording

How to create a booking request

How do you create a Booking Request?

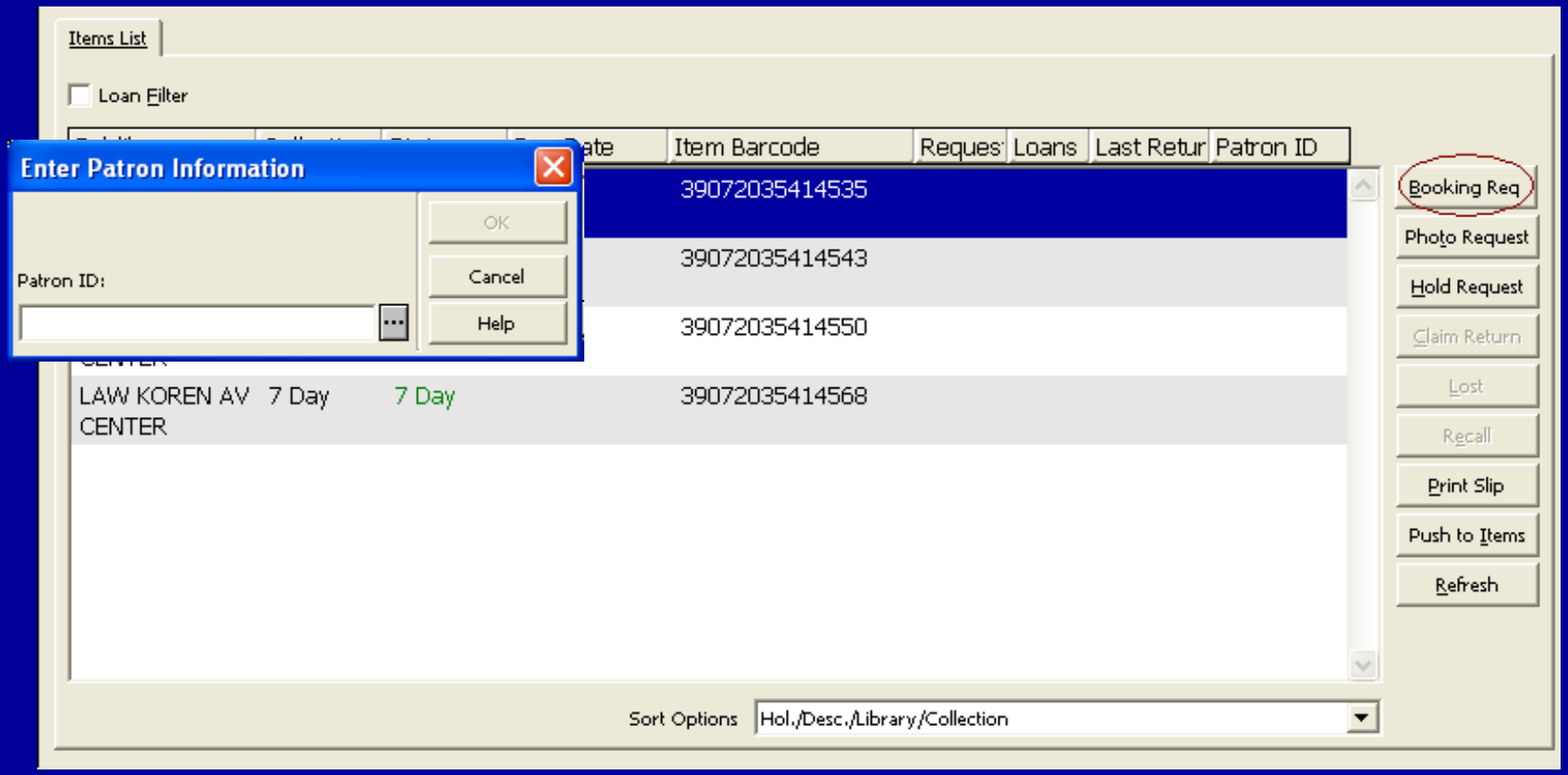
- 2 different ways:
  1. From the Requests menu

You get the following window. Enter an item barcode and patron ID:



How do you create a Booking Request?

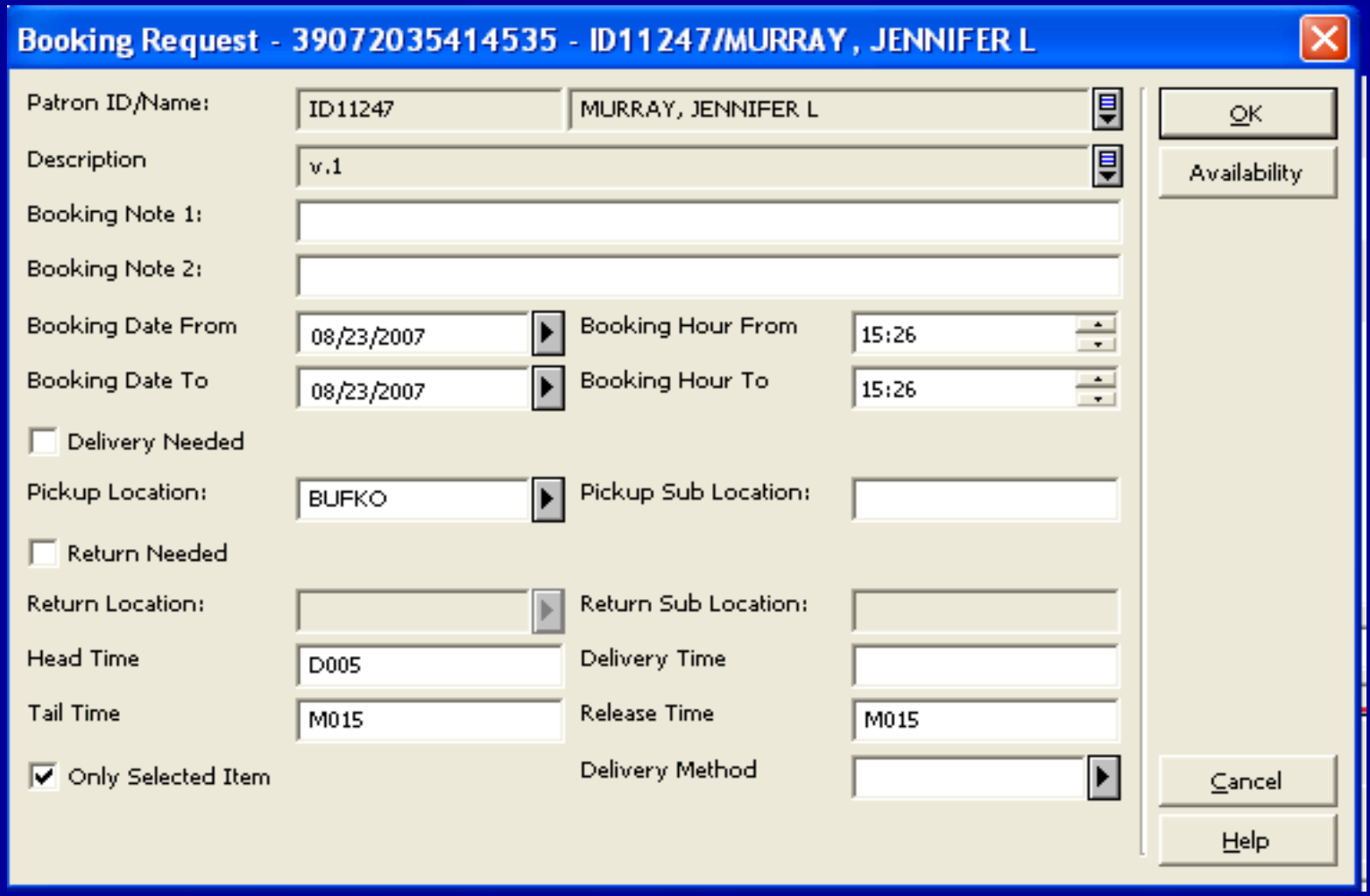
2. From the Booking Request button in the item list



When you click on the ‘Booking Req’ button the ‘Enter Patron Information’ window will pop up and you enter a patron ID.

How do you create a Booking Request?

The following form displays:



Booking Request form details

- **Patron ID/Name**: patron you are creating the booking request for.
- **Description**: item description taken directly from the item record.
- **Booking Note (1 and 2)**: optional free text field.
- **Booking Date/Hour From/To**: When the patron wants the material.
- **Delivery Needed**: if checked the pickup location drop-down will only include delivery locations. A location which is not a sub-library and the item can not be checked out (i.e. classroom). If unchecked the pickup location drop-down will include pickup locations.
- **Pickup Location**: where the patron wants to receive the material.
- **Pickup Sub Location**: free text field.
- **Return Needed**: allows you to choose a return location. If checked the drop-down will include pickup or delivery locations depending on whether pickup or delivery is required.
- **Return Location**: where the patron will return the material.
- **Return Sub Location**: free text field.

Booking Request form details

- **Head Time:** Time needed to process the request. The time listed here is the system default which you can override.

- **Tail Time:** Time needed to process the request once it is returned. The time listed here is the system default which you can override.

- **Delivery Time:** Time needed to deliver the request to the patron. System default is set in tab100. Once you hit ‘OK’ if the request is for delivery it will automatically put in the system default time. You can override the default by typing in a different time.

- **Release Time:** Time that has to pass from a request start time until the item becomes available to other patrons. When the original patron does not come to get the item. The time listed here is the system default which you can override.

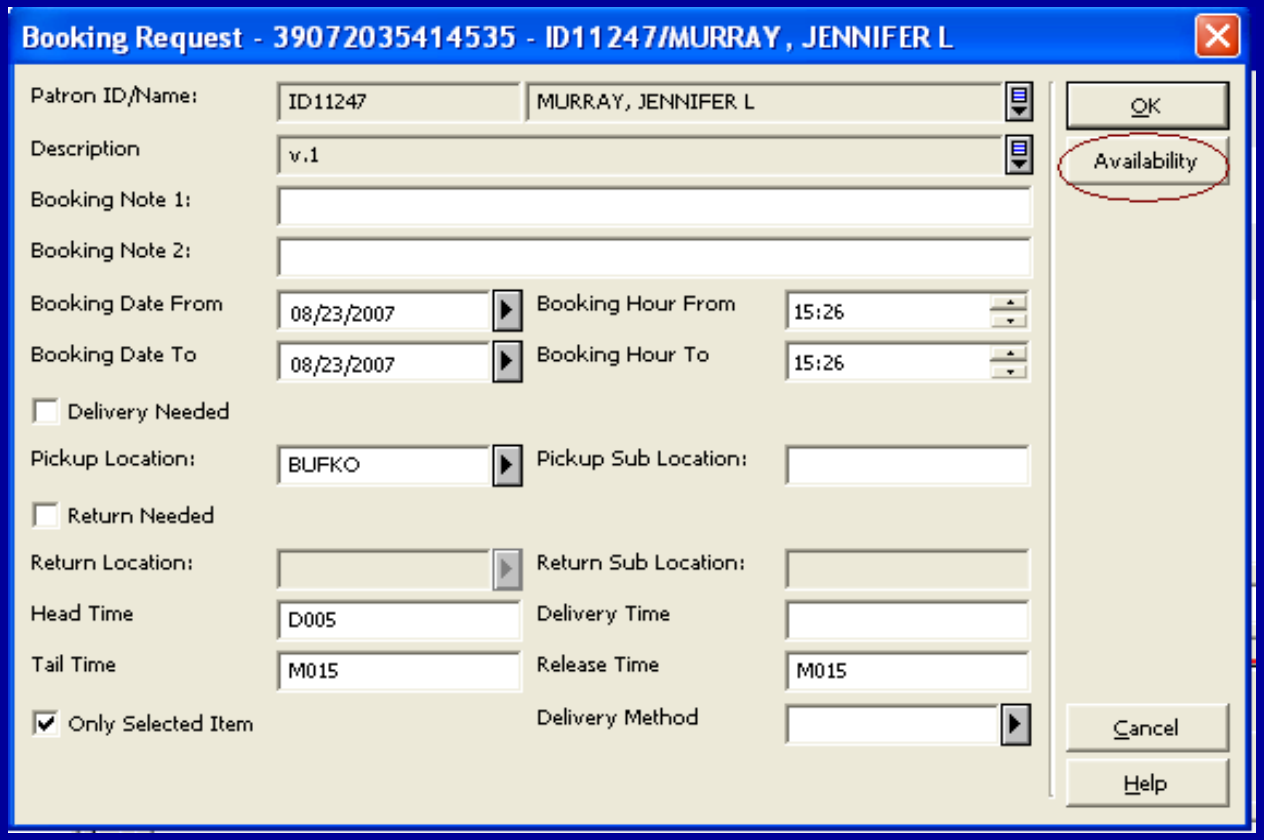
  NOTE: Format for head, tail, delivery and release times is [M/H/D]nnn, where 'M' means minutes, 'H' means hours and 'D' means days. nnn is a three-digit number that is the amount of time required.

- **Only Selected Item:** If you want the request filled only by this item then check the box.

- **Delivery Method:** Choose from predefined list. This is for informational use only.

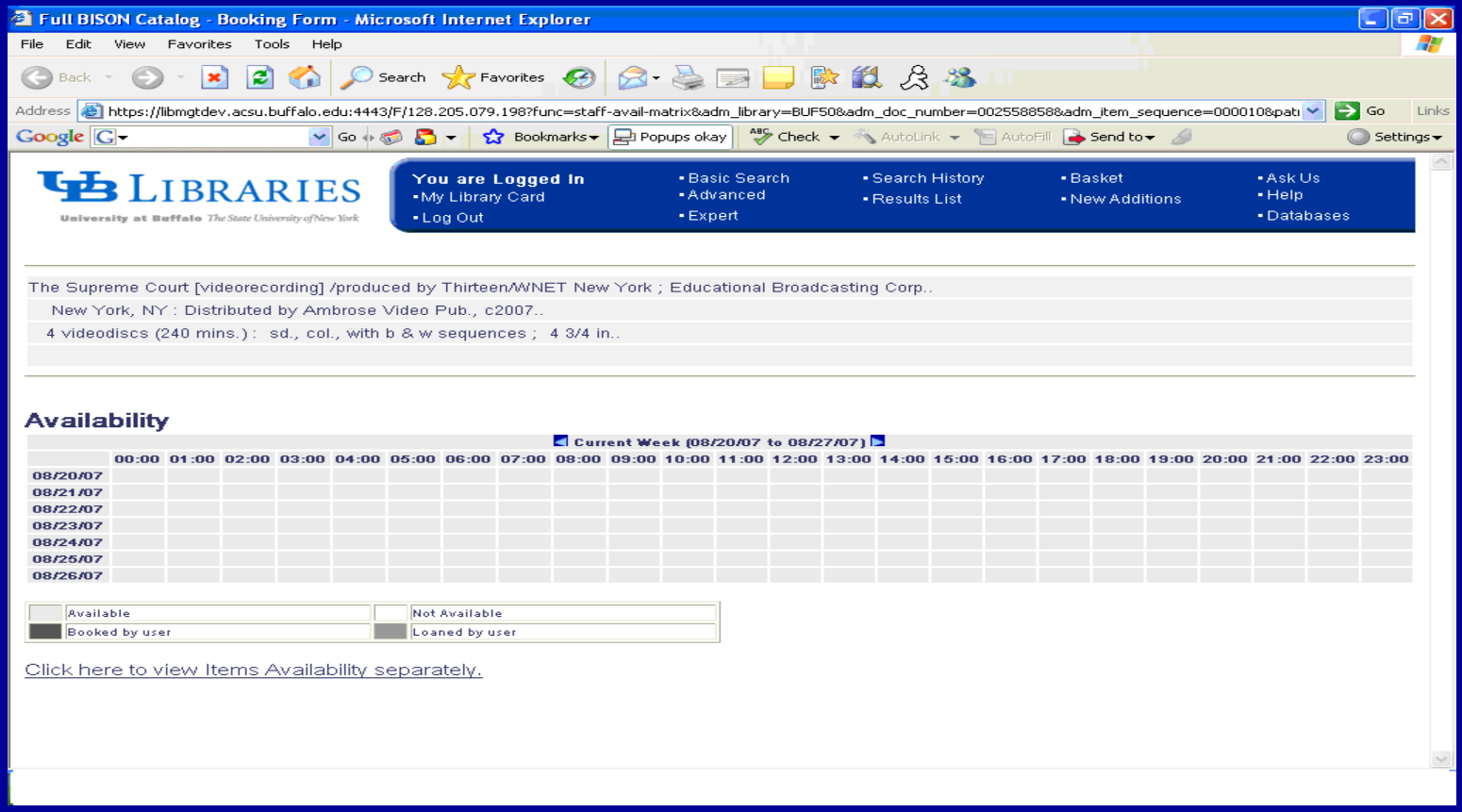
Booking Request form details

- Availability button to view the item availability table:



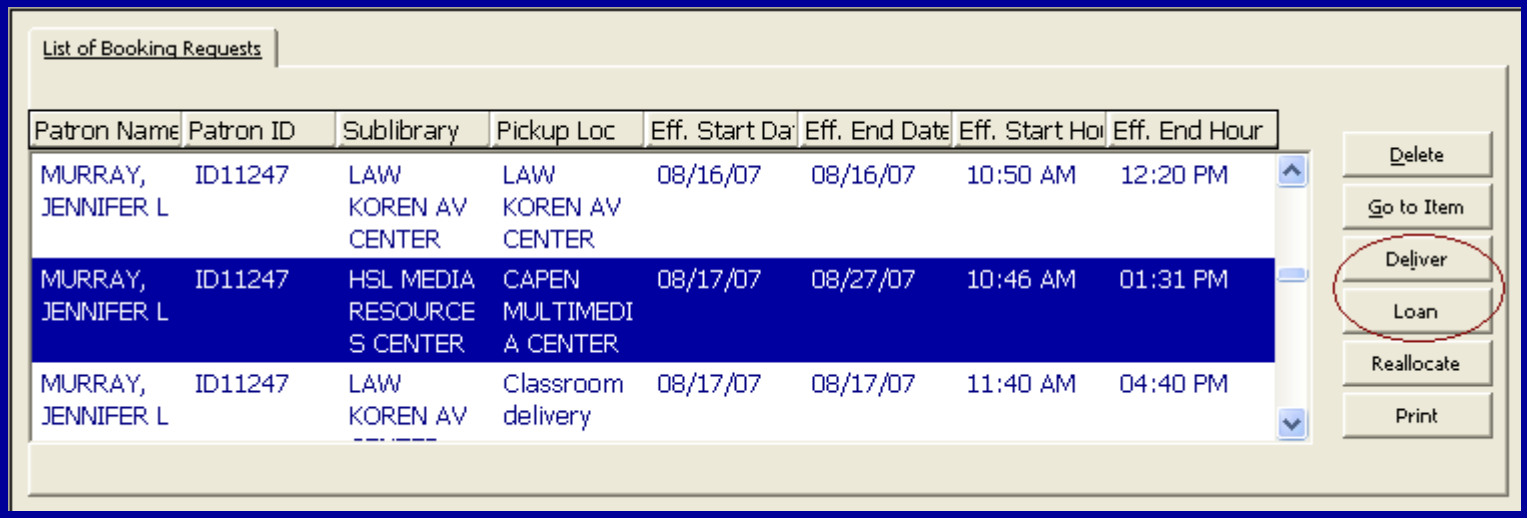
Booking Request form details

- When you click on the availability button a window with the item availability table opens:



Fulfilling a Booking Request

- Once you create a booking request you can fulfill it by delivering or loaning the item depending on your table setup.



Fulfilling a Booking Request

- **Deliver button**
  - This button is active if the pickup location is different from the item's home library.
  - When you click it you will be asked if you are sure you want to deliver the item. It will print a delivery slip.
  - Handling the delivery. Depending on your table setup:
    - Item will go in-transit to the pickup location. This option is used if the pickup location is a check out point.
    - Item is automatically loaned to the patron. This option is used if the pickup location is not a check out point (i.e. classroom).

Fulfilling a Booking Request

- **Loan button**
  - Loaning a booked item can be done by clicking the Loan button that is located in the booking request list in the Patron Tab, the Item Tab and the Administration Tab.
  - When you click loan the item is automatically loaned to the patron as a booked loan and prints/emails a loan receipt.
  - Due date is the booking's end date.

Fulfilling a Booking Request

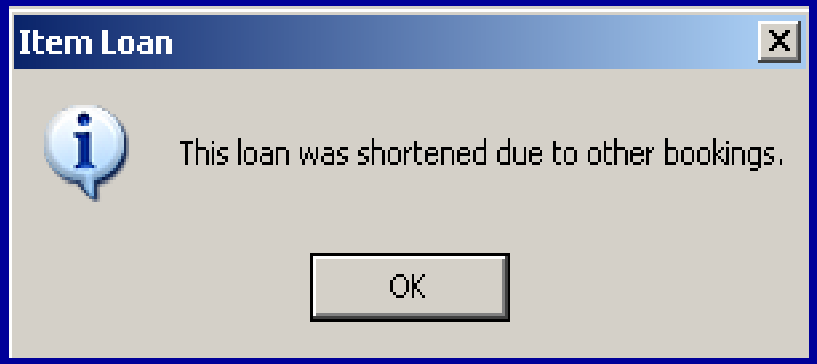
- Once a request is fulfilled, it becomes a loan.
  - The loan is a “Booking Loan”.
  - The due date is the booking end date.
  - The item can not be recalled.

Fulfilling a Booking Request
(another option)

- **If a patron wants to borrow an item that is already booked for them you can loan the booked item using the Loan tab just as non-booked items are loaned. There are several possible scenarios:**
  - If loan due date is before the start of the booking request, the request is cancelled and loaned out like a regular loan.
  - If loan due date is after the start time of a booking request but before the booking end time, what happens depends on tab100 OVERLAP-BOOKING:
    - » The loan can be extended automatically to the booking end time and considered a fulfillment of the request.
    - » Or you will get a message 'Do you want to extend the loan until the booking end time (date/time)?' If you click 'No' the request is cancelled and a regular loan is executed.
  - If loan due date is after the end of the booking, the loan is considered a fulfillment of the request. The due date is shortened to the end of the booking.
  - If loan is made when the booking is active, the loan is considered a fulfillment of the request. The due date is the booking end date.

Loaning an item with a Booking Request

- If another patron loans an item and it has a booking request that falls within the loan time:
  - The request will be reallocated to another “like” item, if the ‘Only Selected Item’ is not checked on the request form.
  - If there isn’t a “like” item then the loan period will be shortened to the start of the booking.



Problems we encountered

- **Availability button**
  - When we clicked on the button we were getting the table but it showed all times as unavailable which was not true.
  - Submitted support incident and found out that in order to see the correct table you must be signed in with a staff user ID that has a patron record with the same ID.
  - If the IDs don't match, you need to create a staff login for booking and a patron record where the login ID matches the patron ID.
  - Then you either need to login to the client with the booking staff login. Or if you are already logged in with another ID you can use the 'Temporary Password Override' prior to creating the request and login with the booking staff login temporarily.

NOTE: You can create booking requests logged in with any user ID. It's only if you want to use the Availability button that you need to do the above.

Problems we encountered

- **In-transits**
  - For booking requests that are to be picked up at a different library, the item goes in-transit to the pickup location fine but when item is checked in at the pickup location the system puts it in-transit back to the home library instead of keeping it at the pickup location.
  - Submitted support incident but have not found out why this is not working.

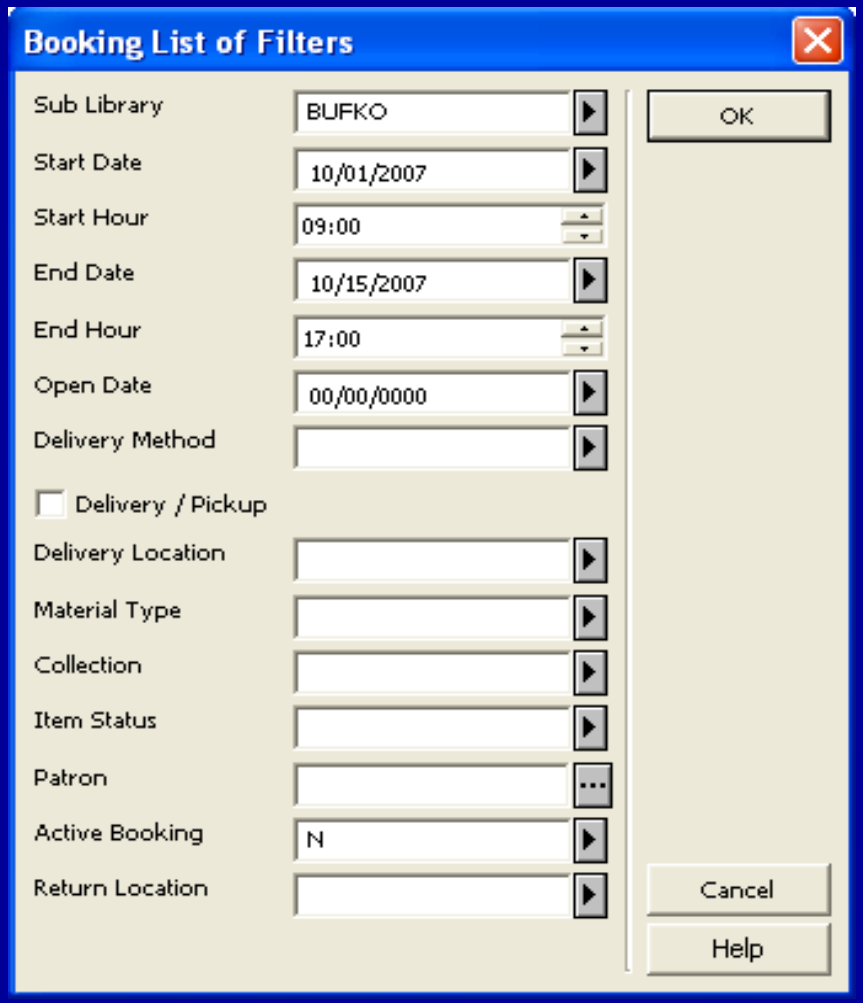
- **Loaning an item right before or during a booking request's head time**
  - The system allows us to check out an item minutes before the head time. The due time is the booking start time and we get the message "This loan was shortened due to other bookings." The system should let us stop the loan.
  - The system allows us to check out an item during the head time. The due date is changed to the current time, making it overdue right away and we get the message "This loan was shortened due to other bookings." The system should block the loan.
  - Submitted support incident and found out that these problems were also raised in v.18 and are considered enhancements.

Booking Request Services

- Call Slips for Requests (cir-12)
  - Produces slips for booking requests.
- Requests Report (cir-07)
  - Produces a report of requests placed for library material.
- Booking Reminders (cir-13)
  - Prints letters to send to patrons notifying them of their upcoming booking request.
- Risk Analysis Report (cir-35)
  - Creates a report of requests that are at risk for not being filled. The service can reallocate or delete these requests.
- Report / Delete Expired Booking Request (cir-34)
  - Creates a report and allows you to delete old booking requests which did not get fulfilled.

Booking Request Filter

- Under the Administration Tab.
- Used to retrieve booking requests of various items and patrons.
- This filter example will retrieve all booking requests for sub-library BUFKO from 10/01/2007 at 9:00am to 10/15/2007 at 5:00pm.
- An item in the list of booking requests can then be delivered, loaned out or deleted.



Questions?

Feel free to contact us:

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