User Manual

Libris Version 2

The Facility and Resource Scheduling Software

The latest version of Crucial Software's Libris scheduling system has been rebuilt from the ground up to make scheduling your facilities and resources as easy as possible without compromising on flexibility.

Libris 2

Printed: November 2005

Publisher

Crucial Software Limited

Authors

Rodney Steele
Gavin Dobson
Nicholas Cross

Table of Contents

Chapter 1

Introduction

1 Introduction

Our philosophy at Crucial Software is to ensure the complete satisfaction of all clients who purchase the Libris Professional Facility and Resource Scheduling system. We believe that the key to ensure such a thing is to provide you with a state of the art fully functional software system, coupled with the most comprehensive user support available.

To that end, this Training Guide serves to guide you through the process of setting up the Libris system and its every day usage. Our goal is for you to become comfortable with the new features of Libris Professional and for this product to become an integral part of your facility and resource management operations.

Further, we seek to help new clients learn the basics and get their system implemented to meet their business needs. Throughout this manual you will find valuable implementation tools and suggestions to help you to take full advantage of the CS Libris Professional, Facility and Resource Management Software System.

Chapter 2

Installing Libris

2 Installing Libris

There are three different ways in which you may wish to install Libris. If you a planning to use Libris on a single computer then see section 2.1 Installing Libris for use on a single computer below. If you have a copy of SQL Server then see section 2.4 Installing Libris Database for SQL Server below. Otherwise see sections 2.2 Installing Libris Server and 2.3 Installing Libris Client.

2.1 Installing Libris for use on a single computer

1. Make sure you are not running any other programs. THIS IS IMPORTANT. The installation process will install the Microsoft Database Engine and this will automatically restart your computer.
2. If you are using the Libris CD click on the Libris Single User Installation option in the menu that comes up when you insert the CD. If you have downloaded the installation routine from the Crucial Software web site then run the InstallSingle.EXE program that you downloaded.
3. You should see a window headed Libris 2 Installation.
4. You may see a message telling you that you need the Microsoft Data Access Components. If you see this message these will automatically be installed now and the computer will then restart. The install process will start again automatically after the restart.
5. You may see a message telling you that the Windows Installer is being installed. If you see this message, once the Installer is installed the computer will automatically restart. The Libris install process will start again automatically after the restart.
6. Click Next.
7. You will see a window telling you that the Microsoft Database Engine (MSDE) is about to be installed.
8. Click Next.
9. The installation process will now install the MSDE, this may take a few minutes so please be patient.
10. The computer will restart.
11. The installation will automatically run again after the computer has restarted.
12. You will see a window telling you that the MSDE has successfully been installed.
13. Click Next.
14. You will see a window asking for the Destination Location. Do not change the Desination Folder unless you have an important reason to install Libris in to a different folder.
15. Click Next.
16. You will now be asked whether you wish to install the sample database or an empty database. If you are installing a trial system it is recommended you install the sample database to see an example of how Libris can be set up.
17. Click Next.
18. The Libris Client will now be installed.
19. You will see a window telling you that Libris has been successfully installed.
20. Run Libris. The first time you run Libris it will check the integrity of the database, this may take up to 2 minutes. Please be patient, this will not happen the next time

you run Libris.
21. You will be asked to log in to Libris and enter a password. Libris requires a password of at least 6 characters. Please make a note of the log in you use here, this will become the administrator login for Libris.
22. You have now completed the installation of Libris.

Note: You may install the Libris Client on to other computers if you wish (see below), but please note this computer must be switched on before those other computers can run Libris. If you wish to do this the please make a note of this computer's name because this will be needed for the other computers.

2.2 Installing Libris Server

1. Make sure you are not running any other programs. THIS IS IMPORTANT. The installation process installs the Microsoft Database Engine and will automatically restart your computer.
2. If you are using the Libris CD click on the Libris Server Installation option in the menu that comes up when you insert the CD. If you have downloaded the installation routine from the Crucial Software web site then run the InstallServer.EXE program that you downloaded.
3. You should see a window headed Libris Server 2 Installation.
4. You may see a message telling you that you need the Microsoft Data Access Components. If you see this message these will automatically be installed now and the computer will then restart. The install process will start again automatically after the restart.
5. You may see a message telling you that the Windows Installer is being installed. If you see this message, once the Installer is installed the computer will automatically restart. The Libris install process will start again automatically after the restart.
6. Click Next.
7. You will see a window telling you that the Microsoft Database Engine (MSDE) is about to be installed.
8. Click Next.
9. The MSDE will now be installed. This may take a few minutes so please be patient.
10. The computer will restart.
11. The installation will automatically run again after the computer has restarted.
12. You will see a window telling you that the MSDE has successfully been installed.
13. Click Next.
14. You will see a window asking for the Destination Location. Do not change the Desination Folder unless you have an important reason to install Libris in to a different folder.
15. Click Next.
16. You will now be asked whether you wish to install the sample database or an empty database. If you are installing a trial system it is recommended you install the sample database to see an example of how Libris can be set up.

17. Click Next.
18. The Libris Database will now be installed.
19. You will see a window telling you that Libris has been successfully installed.
20. Please make a note of this computer's name because this will be needed for installing the Libris Client on the other computers.
21. You have now completed the installation of the Libris Server.

You should now proceed to installing the Libris Client on the users' computers.

2.3 Installing Libris Client

1. Make sure you are not running any other programs. THIS IS IMPORTANT. The installation process may need to install the Microsoft Data Access Components and this will automatically restart your computer.
2. Do not run this unless you have already installed the Libris Server or installed a Libris Database into your SQL Server.
3. If you are using the Libris CD click on the Libris Client Installation option in the menu that comes up when you insert the CD. If you have downloaded the installation routine from the Crucial Software web site then run the InstallClient.EXE program that you downloaded.
4. You should see a window headed Libris Client 2 Installation.
5. You may see a message telling you that you need the Microsoft Data Access Components. If you see this message these will automatically be installed now and the computer will then restart. The install process will start again automatically after the restart.
6. You will see a window asking for the Destination Location.
7. Do not change the Desination Folder unless you have an important reason to install Libris in to a different folder.
8. Click Next.
9. You will see a window asking for the Server Name, Database Name and Database Password.
10. Enter the Server Name that you noted down in step 20. of the Libris Server Installation above.
11. Do not change the Database Name or Password unless you are using a full version of SQL Server, in which case you will need to get this information from your Database Administrator.
12. Click Next.
13. You will see a window asking you to start the installation.
14. Click Next.
15. The Libris Client will now be installed.
16. You will see a window telling you that Libris has been successfully installed.
17. Run Libris. The first time you run Libris it will check the integrity of the database, this may take up to 2 minutes. Please be patient, this will not happen the next time you run Libris.
18. You will be asked to log in to Libris and enter a password. Libris requires a password of at least 6 characters. Please make a note of the log in you use here,

this will become the administrator login for Libris.
19. You have now completed the installation of Libris.

2.4 Installing Libris Database for SQL Server

a. Make sure you are not running any other programs. THIS IS IMPORTANT. The installation process may need to install the Microsoft Data Access Components and this will automatically restart your computer.
b. Click on the Libris Database Installation option.
c. You should see a window headed Libris 2 Database Installation.
d. You may see a message telling you that you need the Microsoft Data Access Components. If you see this message these will automatically be installed now and the computer will then restart. The install process will start again automatically after the restart.
e. You may see a message telling you that the Windows Installer is being installed. If you see this message, once the Installer is installed the computer will automatically restart. The Libris install process will start again automatically after the restart.
f. Click Next.
g. You will see a window asking for the Destination Location. Do not change the Desination Folder unless you have an important reason to install Libris in to a different folder.
h. Click Next.
i. You will now be asked whether you wish to install the sample database or an empty database. If you are installing a trial system it is recommended you install the sample database to see an example of how Libris can be set up.
j. Click Next.
k. The Libris Database will now be installed.
l. You will see a window telling you that Libris has been successfully installed.
m. Please make a note of this computer's name because this will be needed for installing the Libris Client on the other computers.
n. You have now completed the installation of the Libris Database.

Note: The standard installation for SQL Server works only with SQL Server 2000 or MSDE 2.0. If you have SQL Server 7 or MSDE 1.0 then contact Crucial Software for the appropriate installation routine.

You should now proceed to installing the Libris Client on the users' computers.

2.5 Installing Libris Web Viewer

To install the Web Viewer you need to first ensure that the Microsoft Internet Information Server (IIS) version 4.0 or later is installed (see Microsoft documentation to find out how to install this). This comes included with Windows 2000 or XP Professional but is not installed automatically.

Once you have IIS installed you are ready to install the Libris Web Viewer.

1. The Web Viewer needs to be installed on the same computer as the IIS.
2. Run the Libris Web Viewer install program (InstallWeb.EXE)
3. Follow the instructions on screen and click Next.
4. Check the installation directory for the Web Viewer is suitable and click Next.
5. Enter the name of the computer where the Libris Server (MSDE) is installed (or the name of the SQL Server with the Libris database attached – changing the ID and password accordingly).
6. Click Next.
7. Click Next once more to begin the installation.
8. Once the Web Viewer has been installed click Finish.

Before you can start using the Web Viewer you need to tell the IIS where the Web Viewer is located as follows:

1. Select Settings and the Control Panel from the Windows Start menu.
2. Select Administrative Tools and then the Internet Services Manager.
3. Open up the "local computer" option on the left hand panel.
4. Open up "Web Sites".
5. Right click on "Default Web Site" and select "New" and then "Virtual Directory…"
6. Click Next.
7. Enter a directory alias, e.g. "Libris" or "Diary".
8. Click Next.
9. Select the directory where the Web Viewer was installed (selected in step 4. of the Web Viewer installation) followed by \Documents. If you kept the default this will be "C:\Program Files\Crucial Software\Web Viewer 2\Documents".
10. Click Next.
11. Tick the boxes "Read" and "Run scripts (such as ASP)".
12. Click Next.
13. Click Finish.

If you are running IIS 6.0 (Windows Server 2003) you will need to enable Active Server Pages.

1. Load IIS from the Administrative tools in the Control Panel by clicking Start -> Administrative Tools -> IIS Manager (or loading the Control Panel, entering the Administrative Tools folder, and double clicking IIS Manager)
2. Go to the Web Service Extensions tab, click Active Server Pages, then press the "Allow" button on the left.

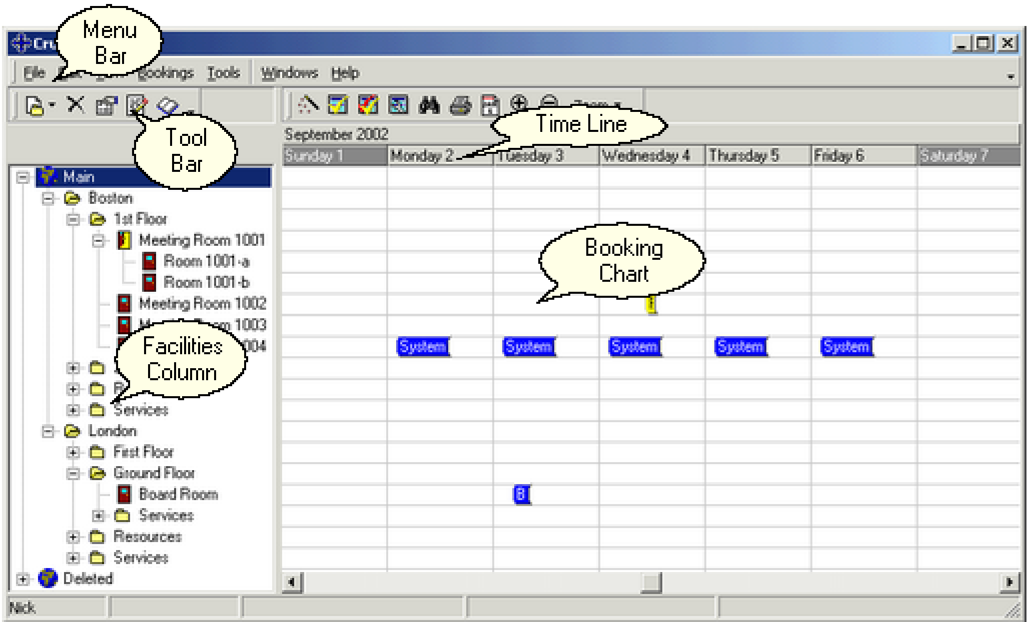
The Web Viewer should now be operational. To run the Web Viewer run Internet Explorer on any computer and then enter the web address of http://server/Libris where *server* is the name of the computer you installed the Web Viewer on (the IIS computer) and Libris is the alias you entered in step 7. of setting up the IIS.

Chapter 3

Starting Up Libris

3 Starting Up Libris

As soon as you open Libris, you will see the screen that you will be using most of the time:-



Occupying the largest part of the screen is a **Booking Chart** on which bookings will be displayed as horizontal bars.

Across the top of the Chart is the **Timeline**, a horizontal ruler which can show dates, or dates and times, according to its scale.

Vertically, down the left side of the Chart, is the **Facilities column** in which are listed the facilities that you have to allocate, such as:-

a. rooms, vehicles, personnel (whatever you book out)

b. resources, such as projectors or lecterns, and

c. services, such as caterers, or language signers.

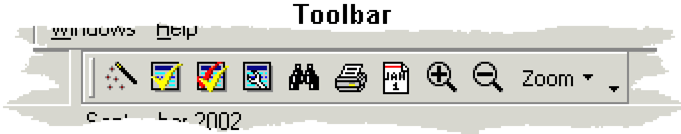
When you first see the Booking Chart, the only entry in this left-hand column is the entry "Main", which is a unique entry, encompassing all the facility entries that you will make. This will become more clear when you are yourself recording facility entries.

*The procedure for **Recording Facilities** is the subject of a later section.*

*As soon as facilities have been recorded, they can be allocated using the **Booking Procedure** which is described later, in the **Making Bookings** section.*

*Immediately above the Timeline on the Booking Chart there is a **Tool Bar** in which are displayed a number of **icons**.*

Toolbar



To display the meaning of Tool Bar icons:

- Using the mouse, move the **pointer** on the screen so that its tip rests on an **icon** to open an **information box** showing the meaning of the icon.

*If you were now to **click** the **left** mouse-button the indicated action would be initiated.*

*Above the Tool Bar is a **Menu Bar** on which is a row of single words, each one of which is the name of a menu.*

Menu Bar

To open a menu from the Menu Bar:

- Move the **pointer** to a word on the menu bar.
- **Click** the **left** mouse-button to open a pull-down a menu.

*You could now initiate an action by moving the pointer to one of those listed in the menu and **clicking** the **left** mouse-button.*

<u>*A Note for the Expert:*</u>

It is the intention of these first few sections to assume little or no prior hands-on experience of computers or computer systems; rather as if the reader were somebody left alone to fend for him or herself, Libris just having been installed for them. If you are used to computers and their ways, please remember that so many of the things which now seem intuitive to you, are really no more than conventions with which you have become familiar; and also, just how daunting it could be when you had no idea what to do next, no clear idea what any of the buttons might do, and no guarantee that a single false move might not lead directly to a complete, totally irreversible, appallingly expensive, and deeply embarrassing break-down, lock-in or burn-out.

Chapter 4

Setting Up Libris

4 Setting Up Libris

Before using Libris you will need to set up Libris for the particular way in which you intend to use the system.

4.1 Settings

Before you can create the items you wish to book there are a number of things you need to decide about and set up. These settings can be access by going to the **Tools** menu on the main screen and selecting **Settings.**

4.1.1 Facilities, Resources and Services

In Libris there are a number of things that you can book: Facilities, Resources and Services.

Facilities are the main items that you intend to book in Libris. These could be rooms, vehicles, people, playing fields, tennis courts, etc.

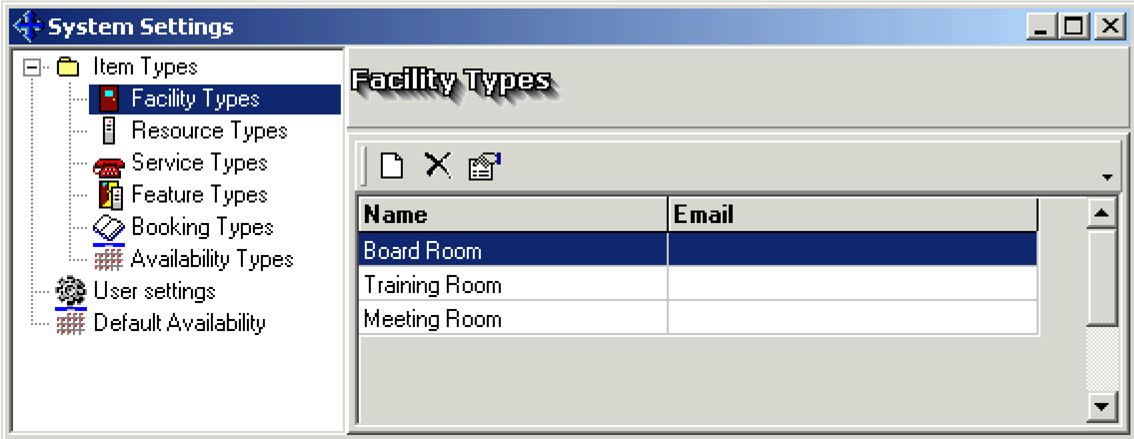
Resources are items that you can book to use within or in addition to a facility. These could be video or audio equipment, furniture, training equipment, etc. A resource, like a facility, can only be booked once at a particular time.

Services are additional items that can be booked but are not limited in number. These may be catering services, security, extra staffing, etc. Services could also be items of which there are such a large number that keeping track of them as individual resources would be unworkable.

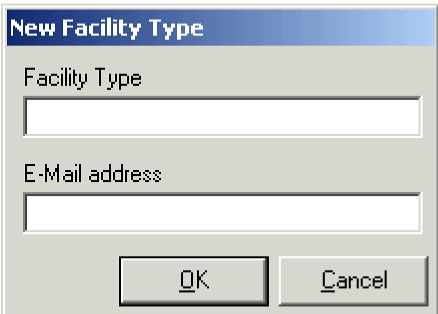
4.1.2 Facility Types

Before you create the items you wish to book in the system you need to set up the different types of facilities you have. For example, if your facilities are rooms, you may have a number of different classifications of rooms: conference rooms, meeting rooms, dinning rooms, theatres, and so forth. You also use the facility type for other sorts of facilities you wish to book such as Limousines, Coaches, Personnel. You can then report on the usage of different types of facility (see Chapter 12).

To set up the Facility Types, select **Settings** from the **Tools** menu on the main screen, then click **Facility Types** in the left hand panel of the **System Settings** window (see below).



To create a new Facility Type click on the **New Facility Type** button to bring up the following screen.

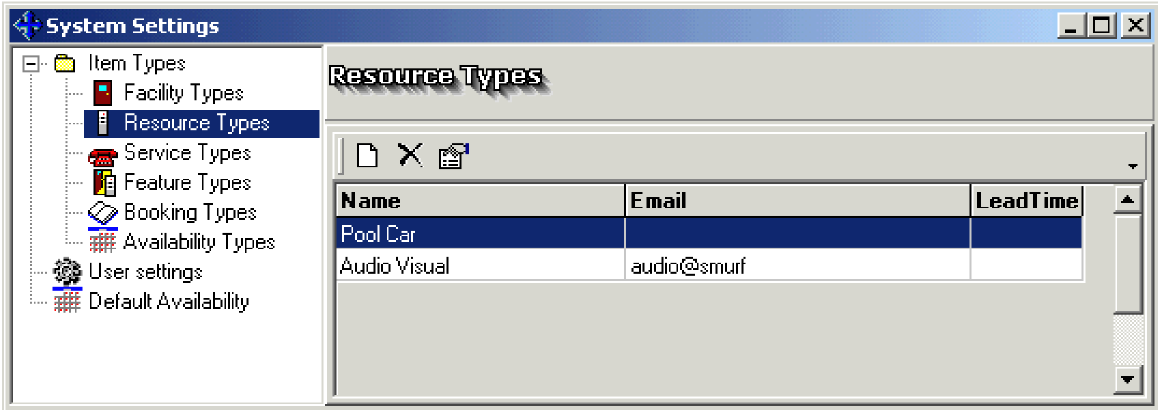


Enter the name of the type in the Facility Type box and, optionally, an email address to send a confirmation email to when a booking is made for a facility of this type.

Then click OK.

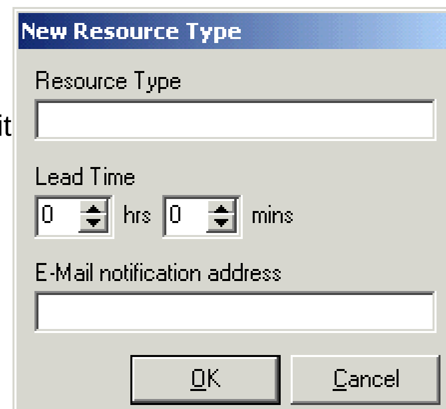
4.1.3 Resource Types

Before you can set up resources you need to set up the different categories of resources . In the **System Settings** window click on **Resource Types** in the list on the left, to show Resource Types in the window on the right, which will, at first be blank. See below.



Click on the New Resource Type button on the left of the bar to reveal the window below:

Enter the Resource Type and, optionally, a Lead Time and E-Mail address, then click the OK button.



The Lead Time is the amount of time before a booking of a resource of this type is due to start that it must be made. I.e. if you have a lead time of one hour, and you want to book it to use at 3pm then you must make the booking no later than 2pm on that day.

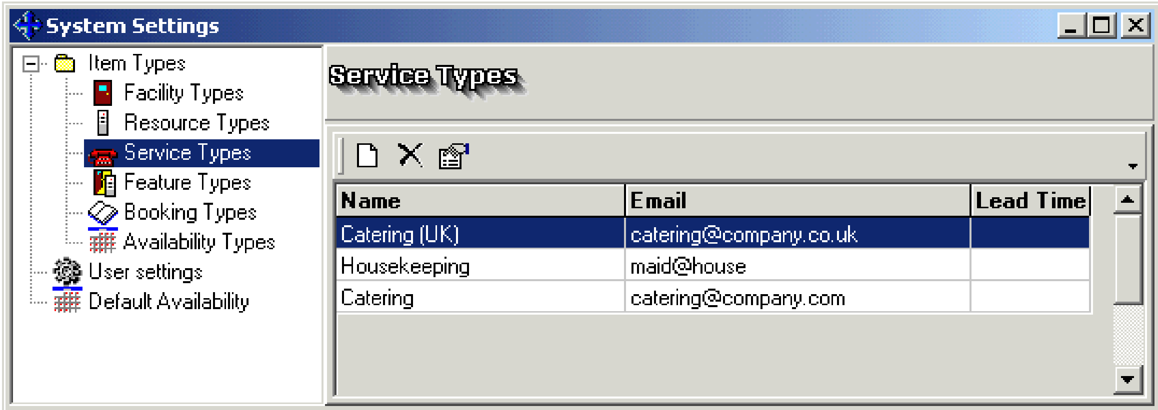
The e-mail notification address is used when Libris sends out email confirmations. The email confirmation will be sent to this email address whenever a resource of this type is included on a booking.

Once you have clicked OK your entry will appear in the **System Settings** window.

4.1.4 Service Types

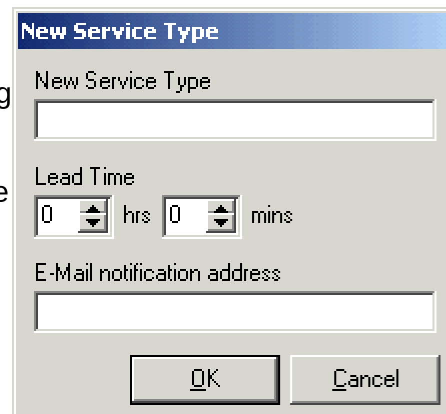
Before you can set up services you need to set up the different categories of services.

In the **System Settings** window click on **Service Types** in the list on the left, to show Service Types in the window on the right, which will, at first be blank (see below).



Click on the **New Service Type** button on the left of the bar to reveal the window below:

Enter the Service Type and, optionally, a Lead Time and email address, then click the OK button.



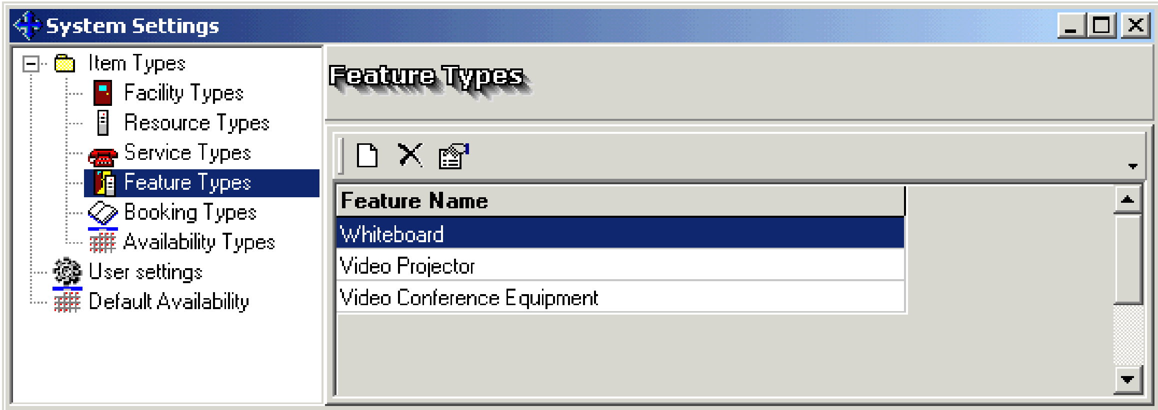
The Lead Time is the amount of time before a booking of a service of this type is due to start that it must be made. I.e. if you have a lead time of one hour, and you want to book it to use at 3pm then you must make the booking no later than 2pm on that day.

The e-mail notification address is used when Libris sends out email confirmations. The email confirmation will be sent to this email address whenever a service of this type is included on a booking.

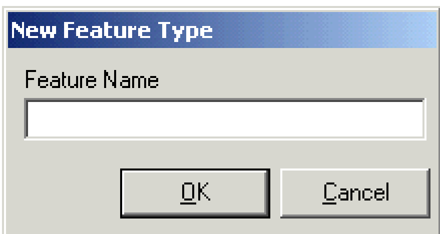
Once you have click OK your entry will appear in the **System Settings** window.

4.1.5 Feature Types

When you set up facilities, they can been given a number of features such as Network points, Whiteboards, Air Conditioning, as so on. Before you set up your facilities you will need to set up the various different types of Features. In the **System Settings** window, click on **Feature Types** in the left hand panel to get the screen below.



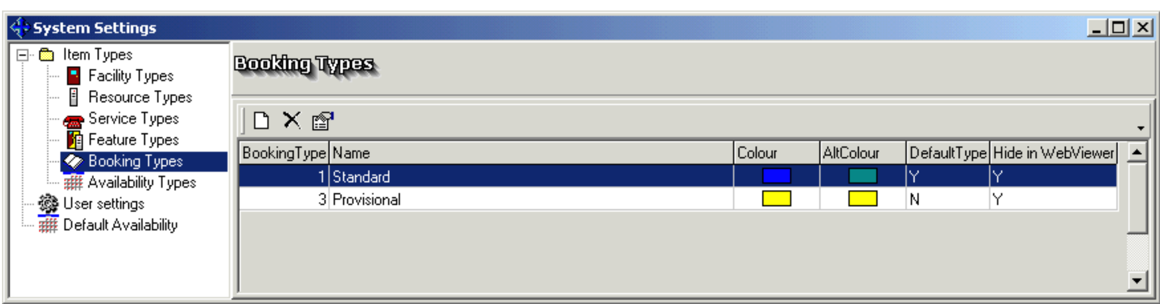
Click on the **New Feature Type** button on the left of the bar to reveal the window below:



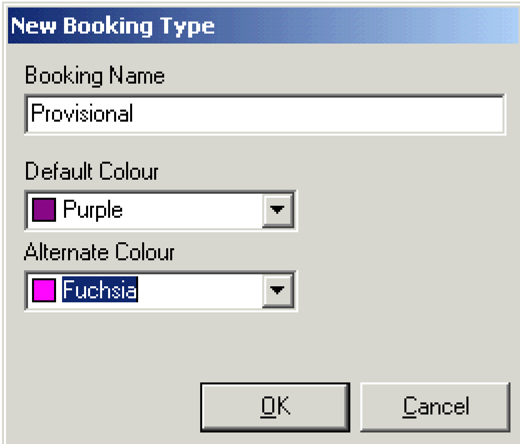
Enter the name of the Feature Type and then click OK.

4.1.6 Booking Types

When making a booking you may wish to distinguish between different types of booking. For example, you may wish to distinguish between bookings for different purposes like internal meetings, external meetings, training sessions, etc. Or you may wish to use the booking type to indicate the status of the booking, i.e. whether it has been confirmed or just provisional. In the **System Settings** window click on Booking Types in the left hand panel to produce the window below.



Click on the **New Booking Type** button on the left of the bar to reveal the window below:

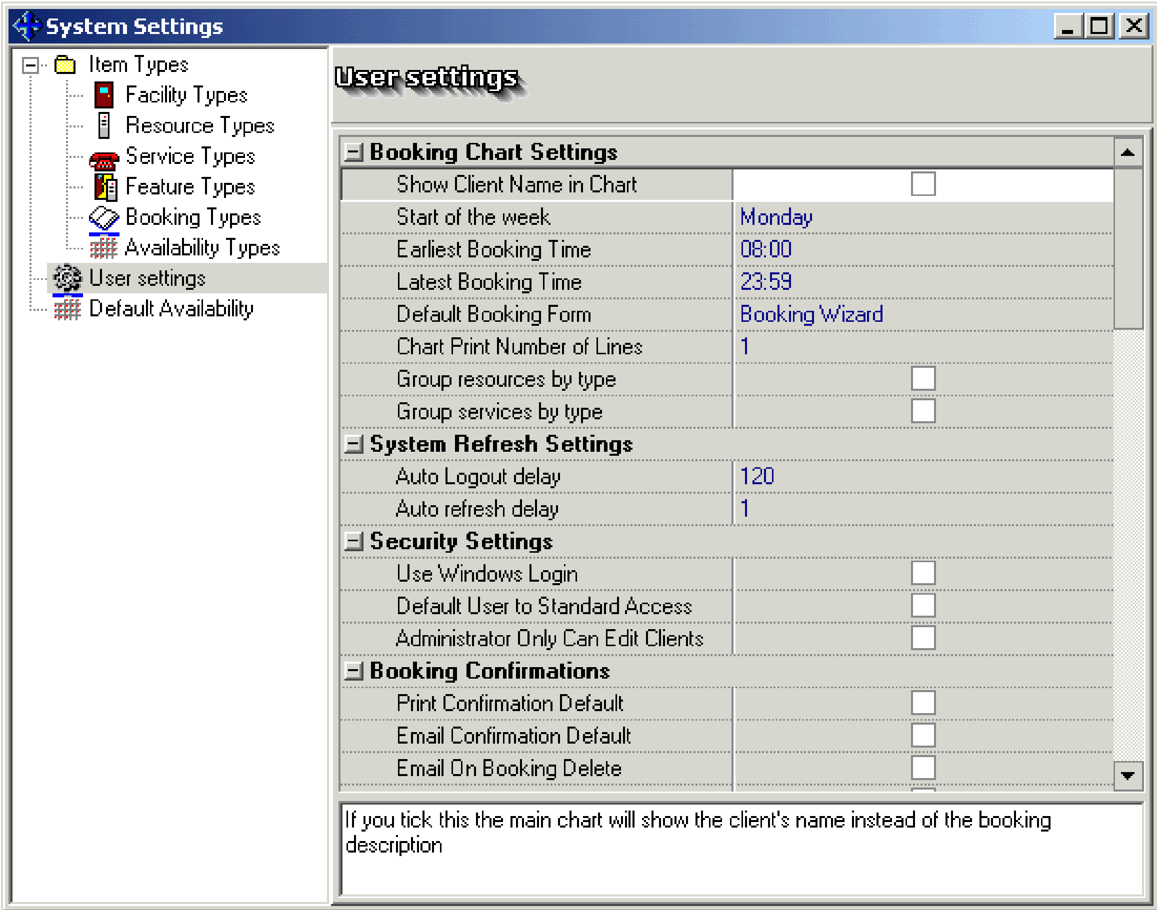


Enter a description for the booking type and then select a colour to show for bookings of this type in the booking chart. The alternate colour is used in the booking chart to indicate bookings made by users other the one currently viewing the booking chart.

If you have the web viewer you will also be given an option to hide bookings of this type from the web viewer.

4.1.7 User Settings

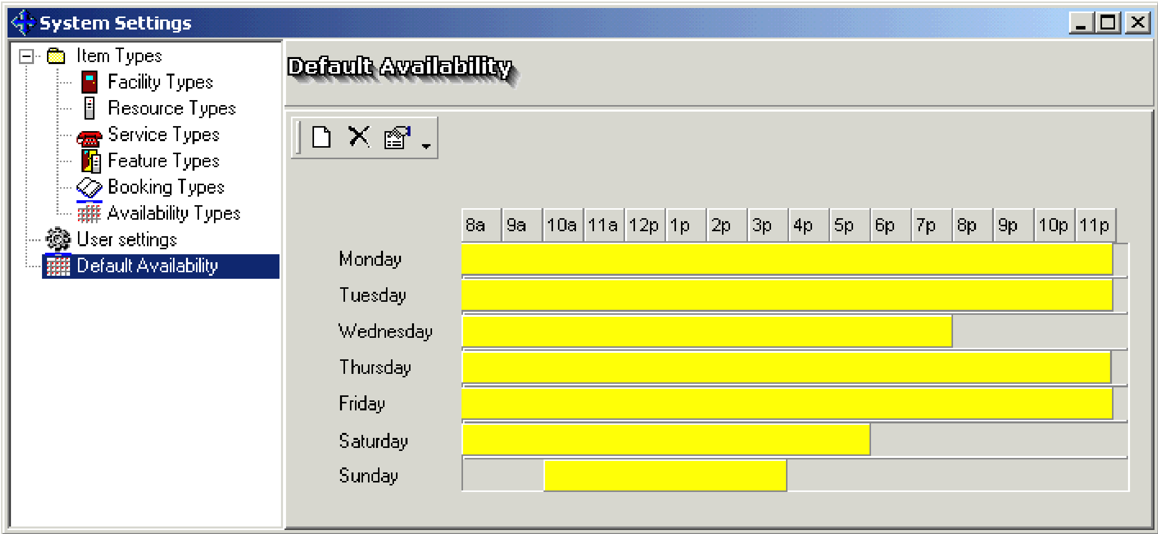
There are number of options to help you adjust Libris to work the way you want it to. To view and change these settings click on **User Settings** in the left hand panel of the **System Settings** window and you should see the window as shown below.



There are many options here, to find details about the complete list see Appendix A in the manual. To change a setting, click on the heading in the left hand half of the list and then change the value in the right hand half. To help you determine what value you should use a description of the setting is shown in the panel below the list.

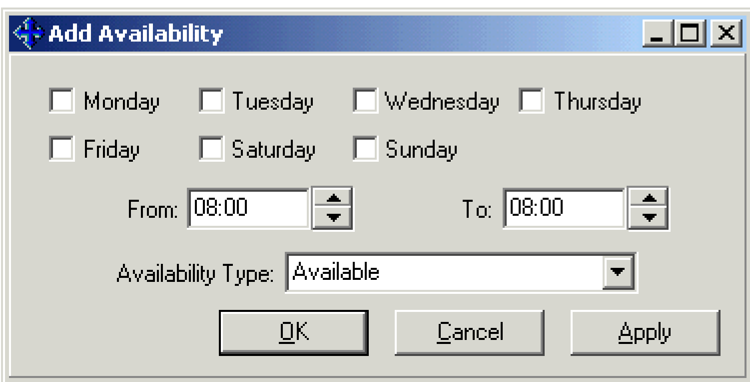
4.1.8 Default Availiability

When setting up Libris you need to determine the days and times on which bookings may be made. In the **System Settings** window select **Default Availability** in the left hand panel.



Here you can set up when all facilities will be available (you can override this for each facility when you set it up).

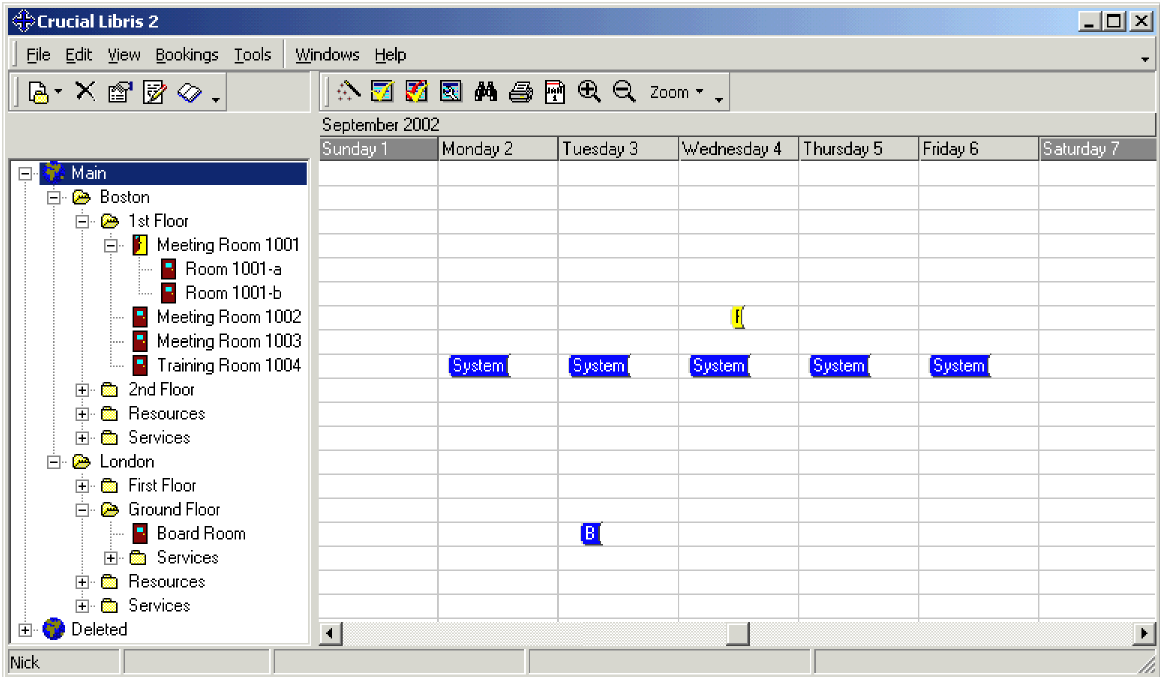
To add one or more new sessions when bookings can be made click on the **Add New Session** button to produce the window below.



Select the day or days you wish to add a session of availability to, then select a start and end time and click OK.

To edit or delete a session of availability click on the session you wish to work with (the border will get thicker) and then click on the **Delete Availability Session** button or the **Edit Availability Session** button.

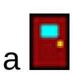
4.2 Folders, Facilities, Resources & Services



Libris allows for the possibility that your facilities (rooms, vehicles, etc), resources and services may be organised in groups, whether for geographic, logistical or some other reason.

Such a group might be a single building, or a complex of buildings that are near to one another and use common services. Similarly, it could refer to a fleet of vehicles which are garaged, serviced or controlled at or from the same location.

If your facilities are organised in groups in this way, then the next step is to record the group names as folders to contain the groups of facilities.

Folders are indicated by a  or  symbol, facilities by a  or  symbol, resources by a  and services by a .

4.3 New Folders

To create a new Folder follow the steps listed below:-

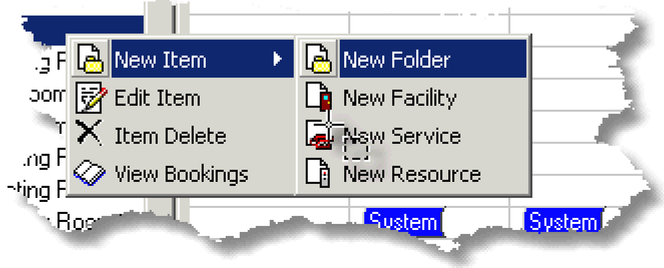
a. Select **Main** in the **Facilities** column to the left of the Booking Chart, by clicking on it.

b. Select **New Item** from the **Edit** menu.

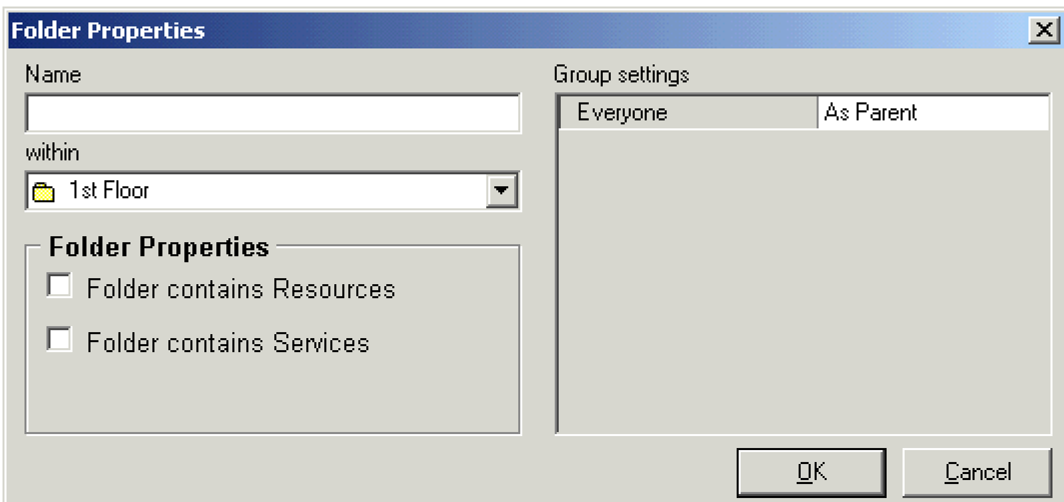
c. Keeping **New Item** highlighted, move the **mouse** to the **right** and another menu will fly out to the right, offering you the choice of:

i. New Folder
ii. New Facility
iii. New Service, and
iv. New Resource.

New Item Menu



d. Select the New Folder button and a form, labelled **Folder Properties** will appear in the centre of the screen.



At this stage, to get started, the only information that you will need to supply is the **Name** - the name of the group, building, complex, fleet, base etc.

All folders can contain facilities, but you have to select whether the folder will contain resources and/or services by ticking the box by "Folder contains Resources" or "Folder contains Services".

If you have the Web Viewer module, you can also select whether bookings of items within this folder will appear in the Web Viewer.

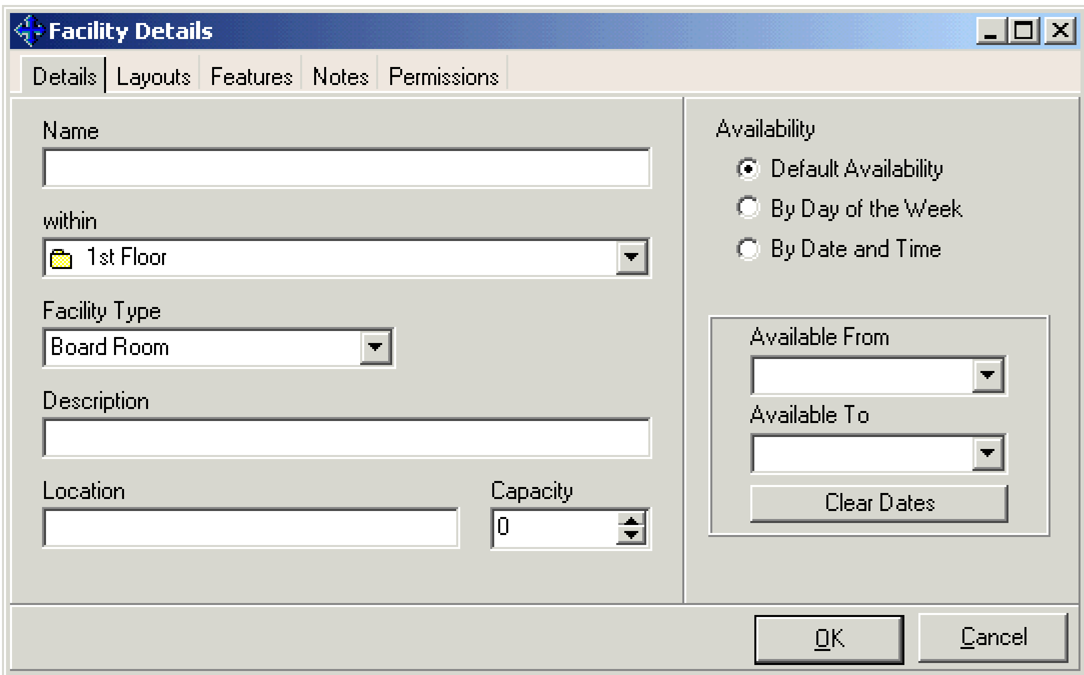
On the right hand side of this window you can select the access rights for User Groups - see Chapter 14 for more details about Access Rights and User Groups.

Click OK and this folder will now appear in the Facility List on the left hand side of the main screen.

4.4 New Facilities

In the list of folders in the **Facilities Column** on the left of the Booking Chart, **highlight** the **folder** in which you want the facility to be recorded (by **clicking** on it).

Move the pointer to the **Menu Bar** at the top of the Booking Chart, and click **Edit** ⇨ **New Item** ⇨ **New Facility** to reveal a Facility Details form:-



You can now fill in the details that you wish to record at this time. On the **Details** page you can enter:

a. Name
Enter the **name** of the facility that you wish to see on booking forms and reports.

b. Within
You can change the folder or facility that contains this new facility by selecting something different from the tree in the box headed **within.**

c. Facility Type
Select the type of facility for use in searches and reports.

d. Description
(Optional) Enter further details about this facility. This field is just for information

purposes.

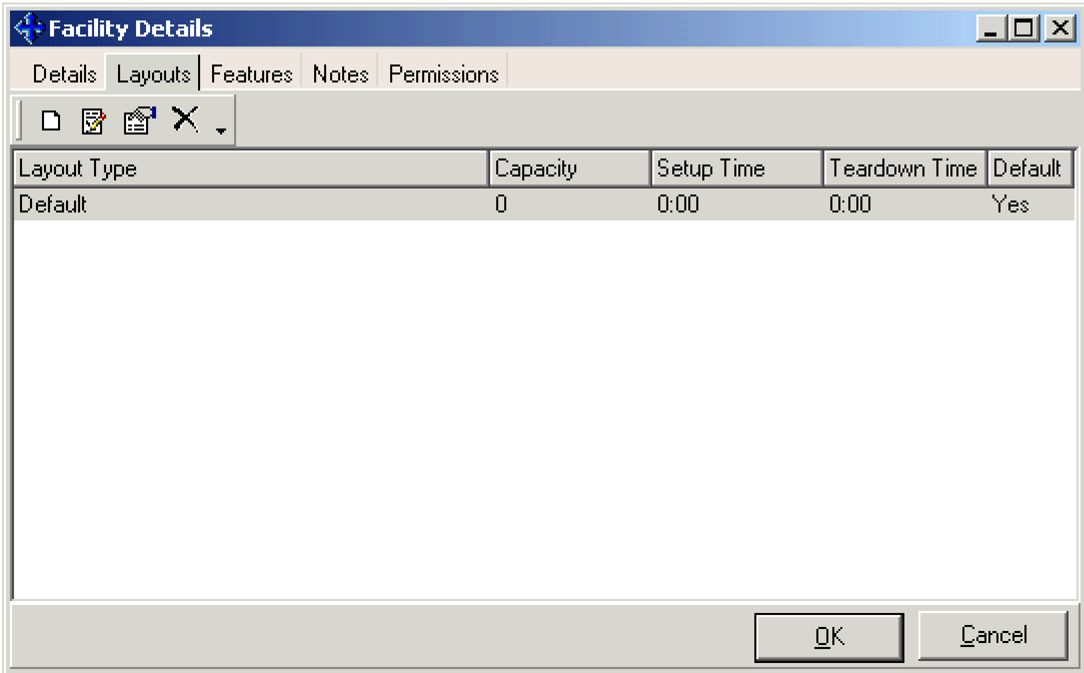
e. Location
(Optional) Enter a description of the location of this facility. This field is just for information purposes.

f. Capacity
Where your facility is a room, then you can select the maximum capacity of the room. If you attempt to make a booking that exceeds this capacity you will be warned or prevented from making the booking (depending upon a User Setting).

g. Availability
Here you select when the facility will be available for bookings. If you select **Default Availability** then the facility is available on the days and times selected in **Default Availability** in the **System Settings** window. If you select one of the other options an extra page tab **Availability** will appear at the top of the window, this extra page will enable you to enter when this facility is available for bookings. Select **By Day of the Week** if the facility is available on the same days every week, select **By Date and Time** if you want to select particular dates on which this facility is available. On example of using **By Date and Time** is when your facilities are staff that have different that work rosters each week.

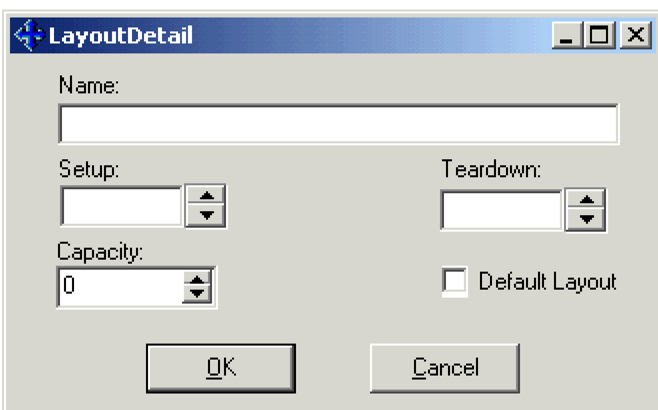
h. Available From
If this facility is not immediately available for bookings, for example, it is a new room that is being built, you can enter the first date on which a booking may be made in this box.

i. Available To
If a facility is going out of service permanently, for example a limousine that is being disposed of, the enter the last day on which a booking may be made in this box. (If a facility is being taken temporarily out service use the **Maintenance Booking** - see section 6.5 below)



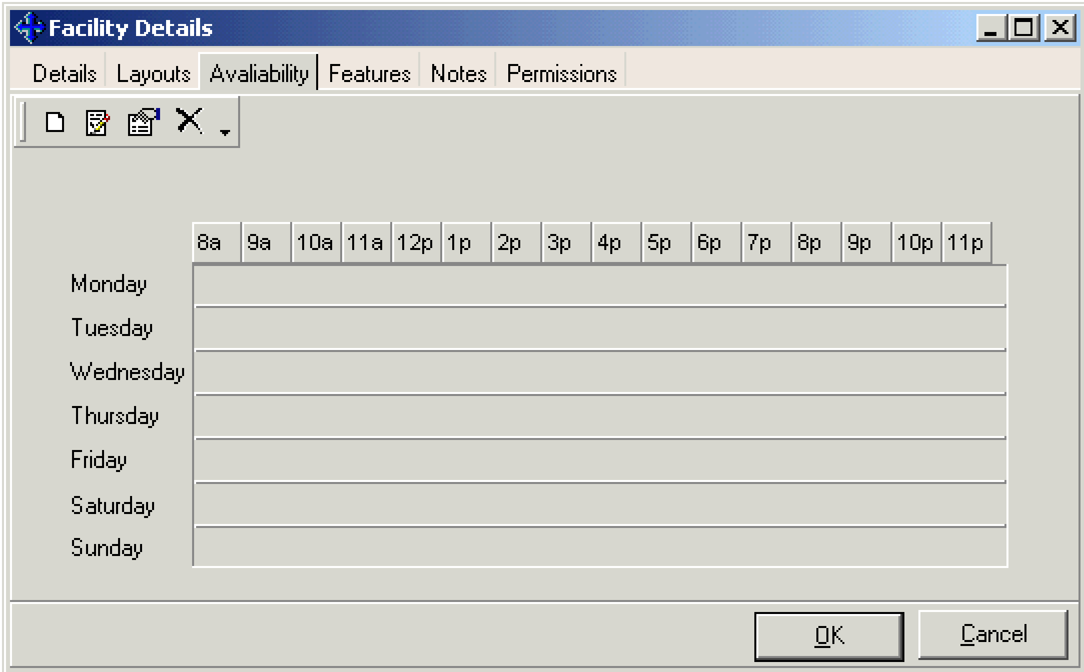
If your facility is a room it may have a number of different layouts, for example boardroom layout, classroom layout or theatre layout. Each of these layouts may have a different capacity and they can take time to set up and tear down.

To enter a new layout click on the **New** button to bring up the following window.



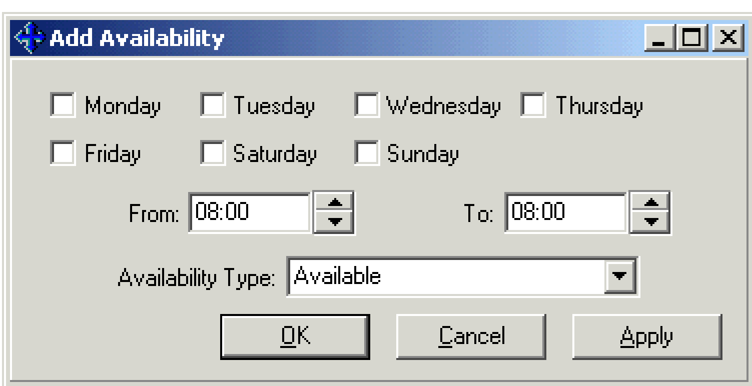
Enter a name for this layout, a capacity for the room when it is in this layout and, optionally, an amount of time to set up and tear down. The setup and teardown times will set the values on the booking form when this layout is selected but they can be changed.

Tick the box next to **Default Layout** if this is the layout that will be selected when this facility is first chosen in a booking.



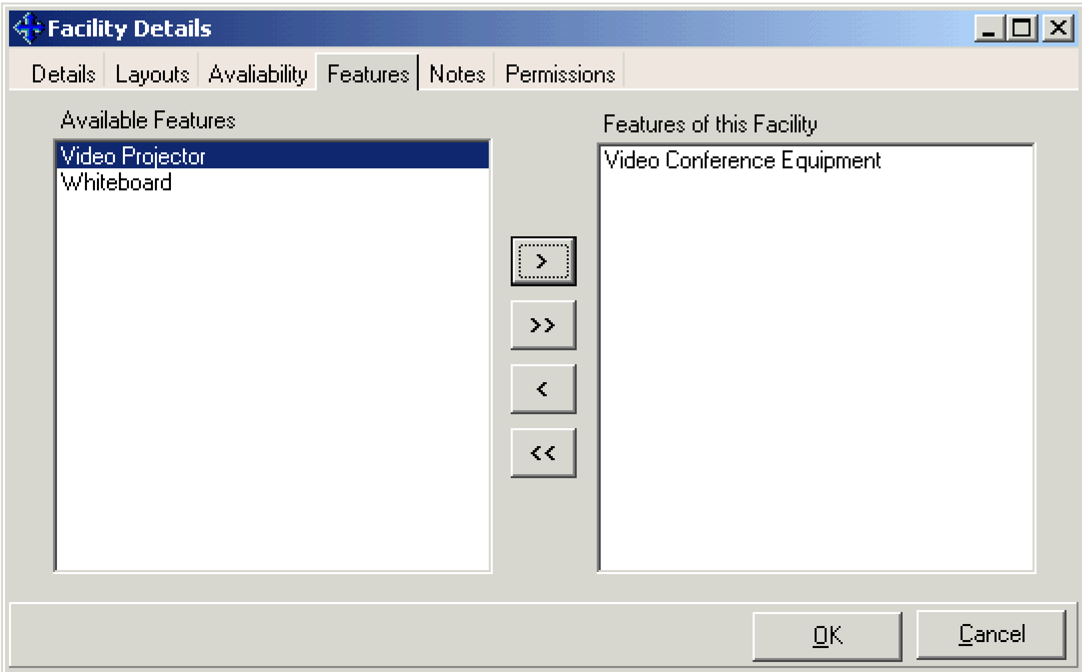
If you have selected an availability of **By Day of the Week** or **By Date and Time** then use the **Availability** page to enter the days or dates and times when this facility can be booked. If you have selected **By Date and Time** there will be a panel at the top headed **Week Beginning** where you can select the week you wish to view and/or edit. Click on the or button to move back or forwards by a week, or click on the button to pop up a calendar to select a particular week.

To add one or more new sessions when bookings can be made click on the **New** button to produce the window below.

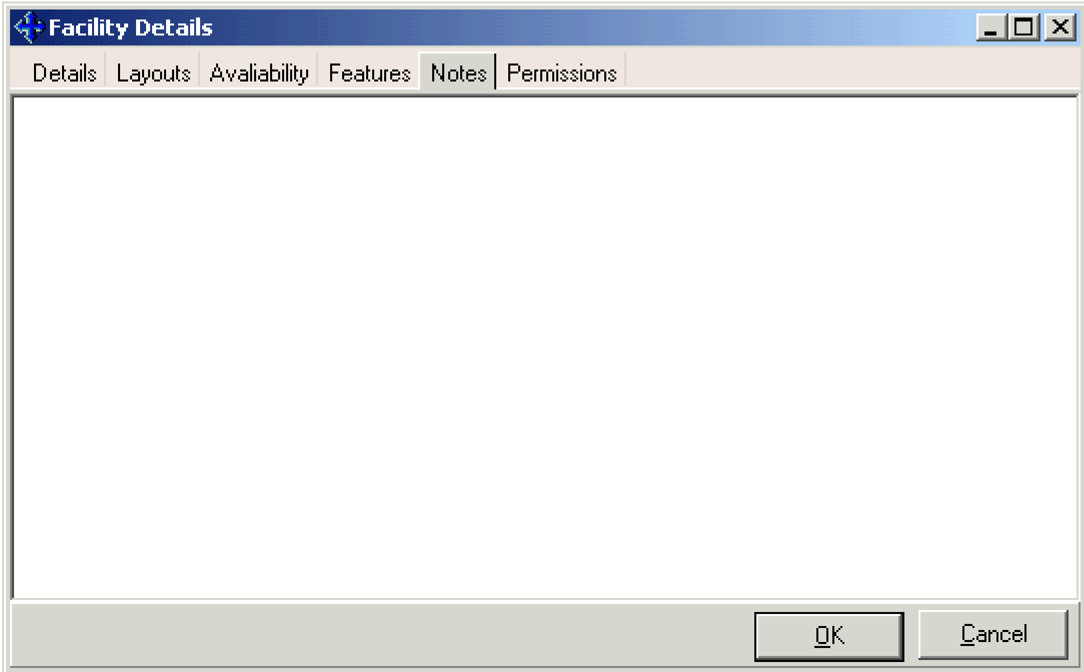


Select the day or days you wish to add a session of availability to, then select a start and end time and click OK.

To edit or delete a session of availability click on the session you wish to work with (the border will get thicker) and then click on the **Delete** button or the **Edit** button.



The **Features** page enables you to select which features this facility has. Click on one of the **Available Features** in the list on the left then click the [>] to move the feature into the **Features of the Facility** list on the right.



Enter any notes you wish to make about this facility just type them into the **Notes** page.

On the **Permissions** page you can select the access rights for User Groups - see Chapter 14 for more details about Access Rights and User Groups.

One you have entered all the details you want click the OK button and the new Facility will appear in the Facility Column on the main screen.

4.5 New Resources

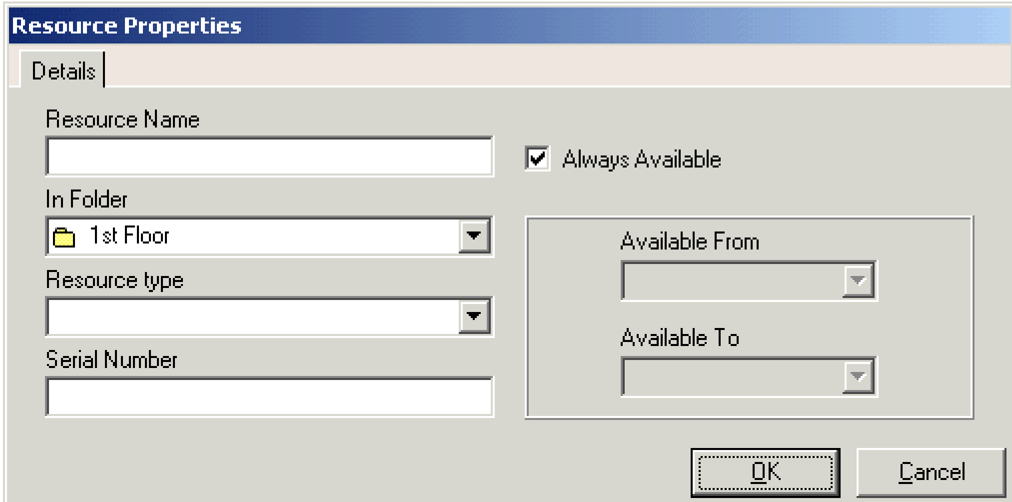
Resources (and Services) can be set up for use in all facilities or to be available only for facilities within a particular folder.

If you wish to add a resource to a folder you must first make sure that the folder is set up to contain resources. See section 3.3 New Folders above.

To record a new Resource in the Facilities Column:

a. Right click on the **Main** or on the appropriate **Folder** line in the **Facilities Column**.

b. **Click** on **New Item** **New Resource** to open a **Resource Properties Form**, ready to be completed.



Note: *When you first see the form, the "In Folder" box is already complete, based on where you obtained the form from the [Booking Chart].*

c. Enter the **Resource Name**, **Resource Type**, and **Serial Number**

d. Provided that the Resource already exists and will remain in your possession, place a tick in the **Always Available** box.

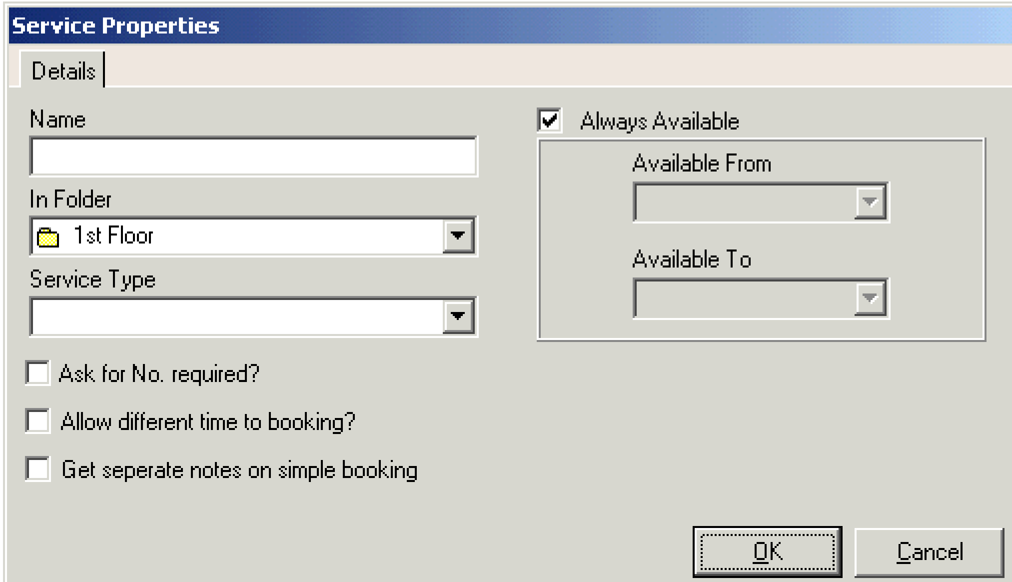
e. Click the OK button to close the form.

4.6 New Services

To record a new Service in the Facilities Column:

a. **Right click** on **Main** or on the appropriate **Folder Name** to open a pop-up menu.

b. Select **New Item** ⇨ **New Service** to open a Service Properties Form.



c. Fill in the **Service Name, in Folder** and **Service Type** as required.

d. Leave the **Always available** box ticked.

e. Close the form by clicking OK.

The other options available to services are:

a. **Ask for No. Required**
If your service is something like coffee where you can book a variable number then select this option.

b. **Allow different time to booking?**
With a simple booking (or a booking wizard booking) a service is presumed to be required at the same time(s) as the facility. If you wish to be able to select a different time for this service then select this option.

c. **Get separate notes on simple booking**
If you need to get additional information regarding a service when it is booked then select this option.

Chapter 5

Making a Booking

5 Making a Booking

5.1 Ways to make a booking

You can book a facility using one of four procedures which start from the Tool Bar or from the Menu Bar:

a. calling for and completing a Simple Booking Form,

b. calling for and completing a Complex Booking Form,

c. calling for and completing a Maintenance Booking Form, and a

d. Booking Wizard, which leads you through a series of forms.

Alternatively, for a single booking, you can start by **drawing a Booking Bar** straight onto the Facility Line, as follows:

a. Locate the horizontal **facility line** adjacent to the **name of the facility** (in the facilities column) that you wish to book.

b. Move the **mouse pointer** along the **facility line** until you come to the **day and time** (as shown on the Timeline across the head of the chart) that you want the booking to **commence**.

   As you move the pointer across the booking chart a small box opens, from time to time, showing the exact time and date that the pointer is indicating.

c. Press the **left** mouse-button and **keep it depressed** as you **move the pointer** along the facility line towards the right.

   As you move the pointer now with the mouse-button depressed, the **area of the facility line** over which it passes becomes **shaded**: this is the **Booking Bar**.

d. When the pointer reaches the time and date that the booking **ends**, **release** the mouse-button.

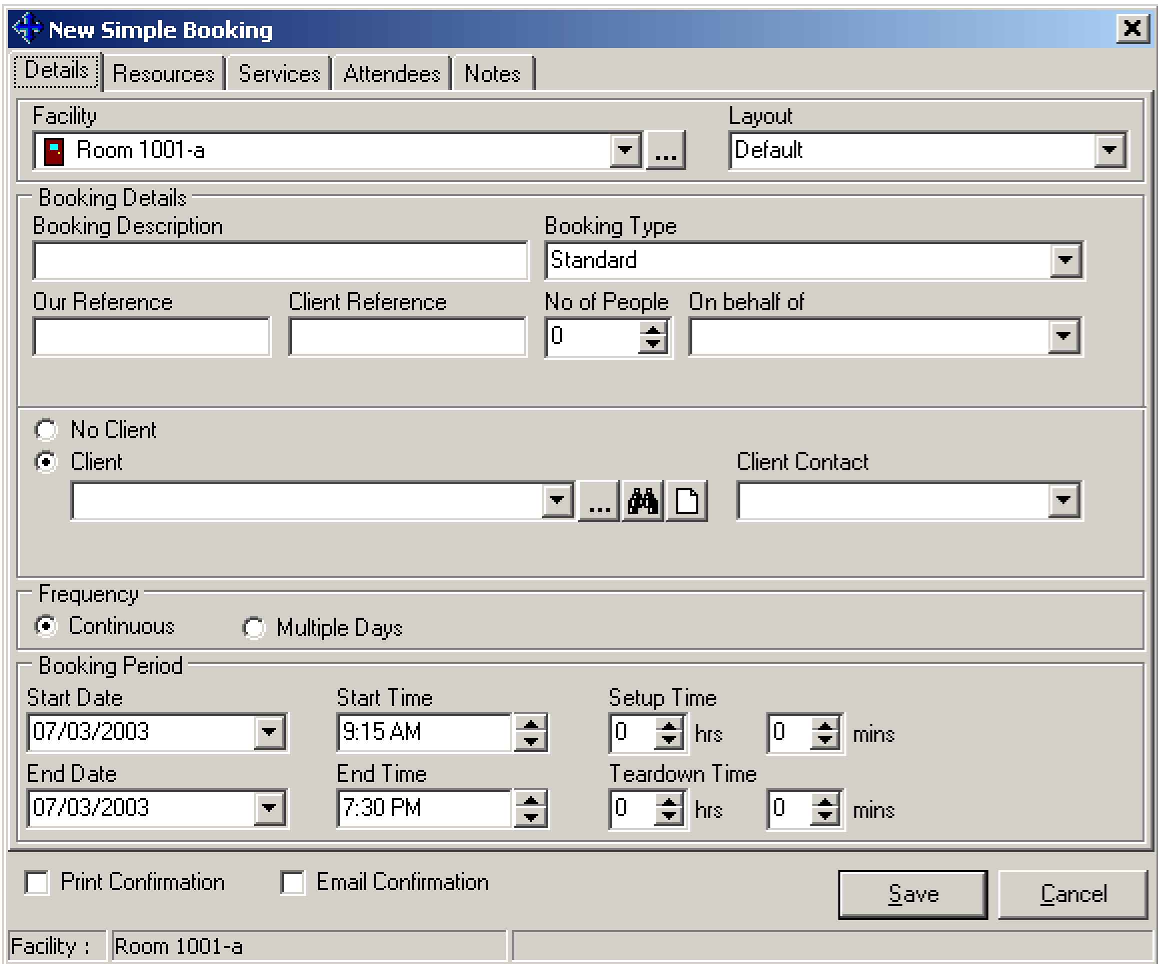
   The moment you release the mouse-button, the Booking Bar becomes fixed, and a **New Simple Booking Form** opens, on which the Facility Name; the start date and time, and the finish date and time, are already recorded to reflect the Booking Bar that you have just drawn.

> ***Tip:*** *This method calls for a steady hand, but it may be worth considering because it is quick and graphic and because it shows you at once if you are about to double-book a facility.*

Note: The booking form that opens when **drawing a booking** can be changed in the **User Settings**.

5.2 Simple Booking

On starting a simple booking you will see a form similar to the one below.



On the **Details** page enter some or all of the following information. These options may or may not appear or may appear slightly differently depending on how you have set up your User Settings.

a. Facility
Click on the down arrow button on the left of the Facility box to pop up the tree of folders and facilities and select the facility you wish to book.

b. Layout

Popup the list of layouts that are available for this facility and select the one you want.

c. Booking Description
Enter a description of the purpose of the booking. This description will be shown on confirmations and the booking chart on the main screen (depending on User Settings).

d. Booking Type
Select the type of booking from the list. The colour associated with the booking type will be used to determine the colour of the booking in the booking chart.

e. Our Reference
If you have a reference for the booking then enter it here.

f. Client Reference
If you have a client and they have a reference for this booking then you can enter it here.

g. No of people
If the facility you are booking is a room then you may want to record how many people will be using the room. This number is checked against the maximum capacity for the room (or layout) and if the number exceeds the capacity you will be warned or prevented from making the booking depending on your User Settings.

h. On Behalf Of
If you are making this booking on behalf of someone else within your organisation, you can select anyone from the users list here.

i. No Client/Client
If there is no client associated with this booking select **No Client** otherwise select **Client**. You can opt to have only one of these options available or choose which one you wish to have selected as the default through User Settings.

j. Client Name
If you have select to have a client associated with this booking then you can either pop up the list of clients and select the client or start typing the client name into this box, Libris will find the first client that matches the letters you type until it finds the one you want. You view the details of the client you have selected by clicking on the ... **Client Details** button. Alternatively, if you do not know precisely the name of the client you are looking for you can use the **Find Client** button. If the booking is for a new client you can enter the details from here by clicking on the **Add New Client** button, see Chapter 10 for details on how to enter the client details.

k. Client Contact

If the client has more than one contact you can select which contact from the client you are making this booking from the list of available contacts.

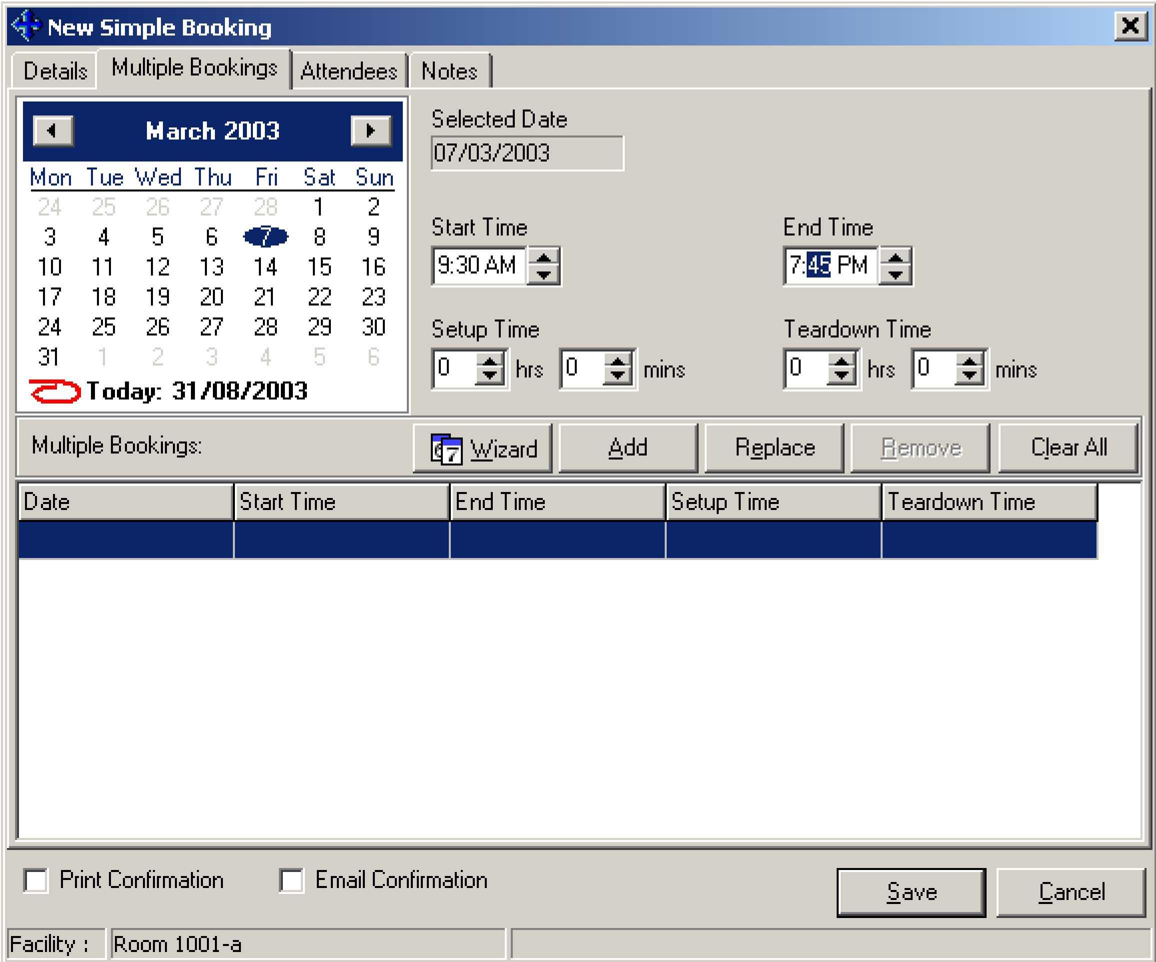
l. Frequency
If your booking is on a single day or for a continuous period the select **Continuous**, if your booking occurs on a number of different days then select **Multiple Days**.

m. Booking Period
If you have selected **Continuous** in the Frequency box above, then you can enter the date and time the booking will start with an amount of time for setup, if relevant, and the date and time the booking will end with an amount of for teardown, if relevant.

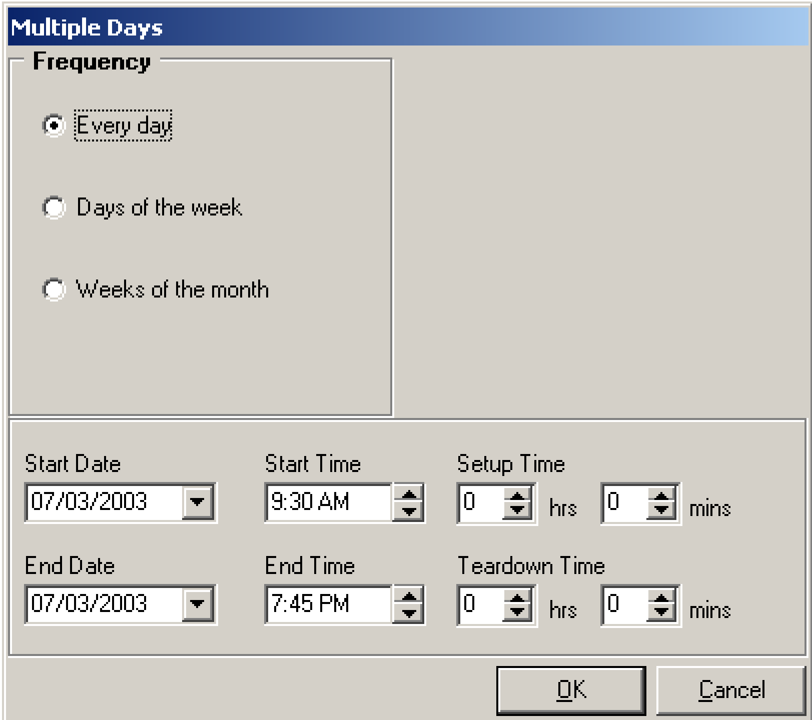
n. Print Confirmation
Tick this box if you wish a Confirmation to be printed out as soon as you complete this booking.

o. Email Confirmation
Tick this box if you wish a Confirmation Email to be sent out as soon as you complete this booking.

If you have selected **Multiple Days** in the Frequency box then a **Multiple Bookings** page will be available at the top of the window.

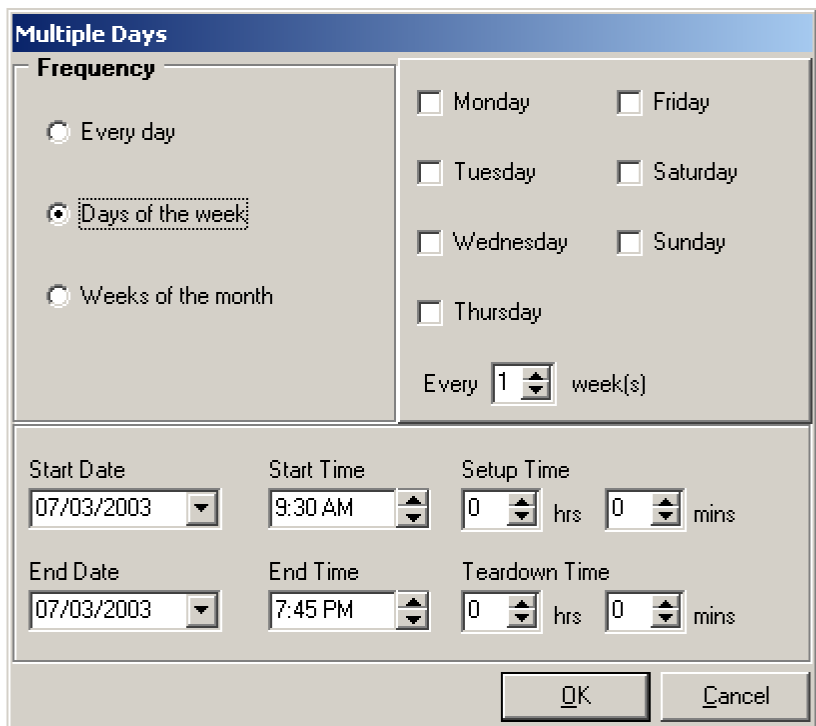


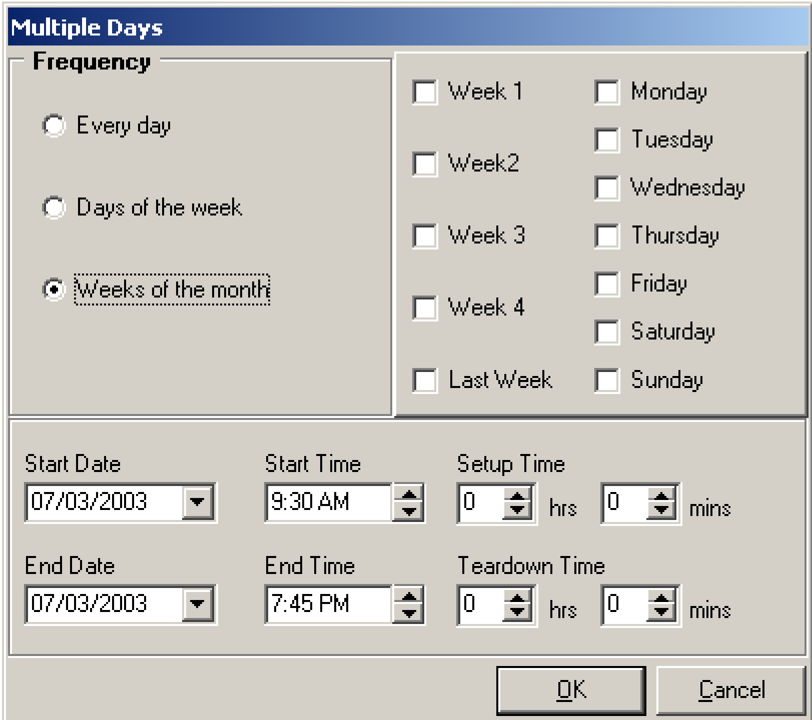
On this page you can enter the various dates and time you wish to include in this booking. You can either add the dates one by one by selecting the date in the calendar in the top left corner and then selecting the start and end times, and the amount of time required for setup and teardown and then clicking the Add button; or you can add dates by using the date wizard by clicking on the Wizard button (see below). The dates and times you have selected will be displayed in the list in the bottom half of the page.



If you wish to add a booking for every available day between two dates, select **Every Day**, then select the start and end dates of the period and the times the booking will start and end on each day of the booking with the amount of time for setup and teardown on each day.

If you wish to make a booking once a week on the same day each week then select **Days of the week**. Click on the day of the week you wish to use then select the start and end dates of the period and start and end times as before. You can also choose to make the booking every fortnight or every 3 or more weeks by selecting the number of weeks in the **Every ... week(s)** box.

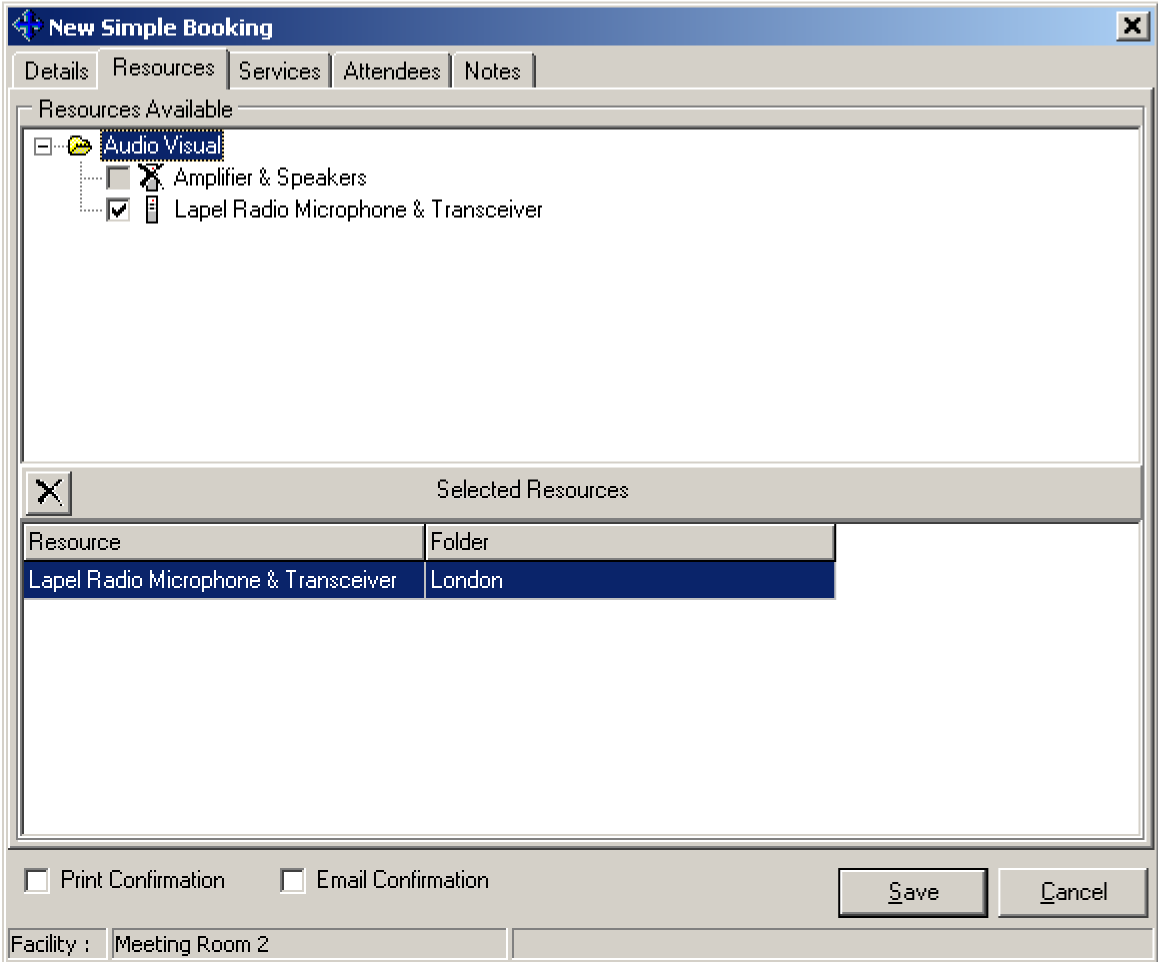




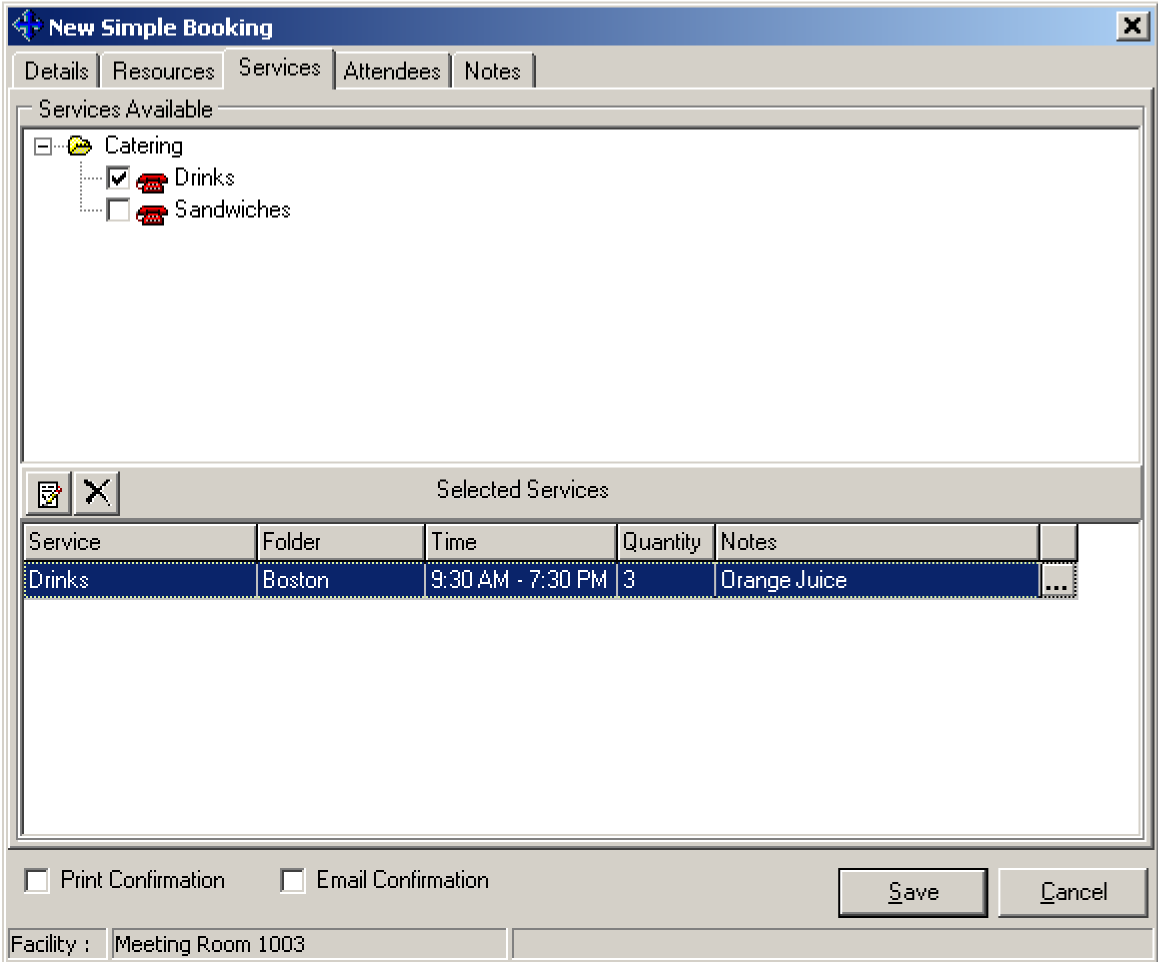
If your booking occurs on certain weeks every month then select **Weeks of the month**. Click on the day of the week you wish to use and the week or weeks you wish to use. For example, click Week 2 and Wednesday if you wish your booking to be every 2nd Wednesday, or click Last Week and Thursday if you wish you booking to be on the last Thursday of every month. Select dates and times as before.

Click OK to add the dates and times to the list of dates on the booking form. If there is already a booking for one or more of the dates and times you have selected an error message will appear. Also, if one of the dates of the booking falls on a holiday that has been marked to **Prevent Bookings** you will get an error message. Such dates will not be added to the list but all the rest will be.

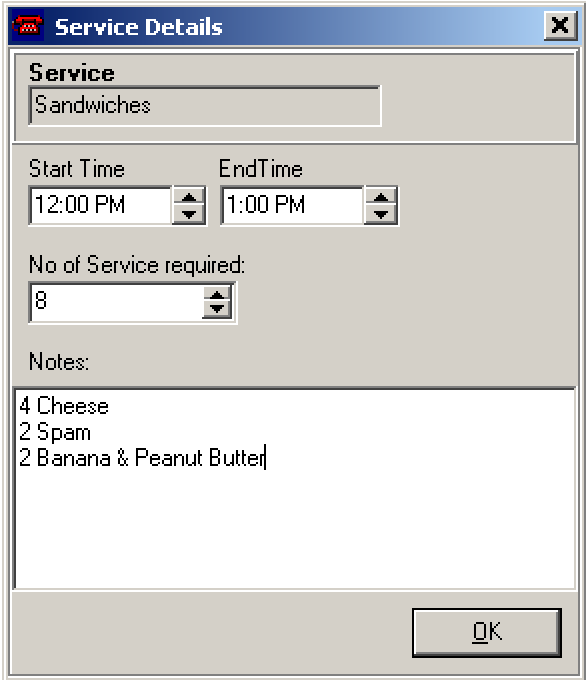
If you wish to change one of the dates and times added, double click on the row you wish to change to bring the details back into the top half of the screen, change the date and/or times and then click the Replace button. If you wish to remove one of the dates and times click on the row you wish to delete then click the Remove button.



You can book resources that you wish to use with or within the facility that you are booking in the **Resources** page. When you select the Resources page you will be shown a list of resources that are contained in either the **Main** folder or the folder that contains the facility you are booking (or the folder that contains the folder that contains the facility, or so on up the hierarchy). These resources will be grouped by resource type. Simply tick the resources you wish to book and they will be added to the list of selected resources at the bottom of the page. If a resource has already been booked during one or more of the dates and times required, or one or more of the dates falls outside the Available From and Available To dates of the resource, you will not be able to tick that resource and the image next to it will appear with a cross through it .



Similar to resources, services that you require with or in the facility can be booked on the **Services** page. You will see a list of services that are contained in either the **Main** folder or the folder that contains the facility you are booking (or the folder that contains the folder that contains the facility, or so on up the hierarchy). These services will be grouped by service type. Simply tick the services you wish to book and they will be added to the list of selected services at the bottom of the page. If the service has been set up to require additional information (number required, different booking time and/or notes) a window will pop up for you to enter that information.

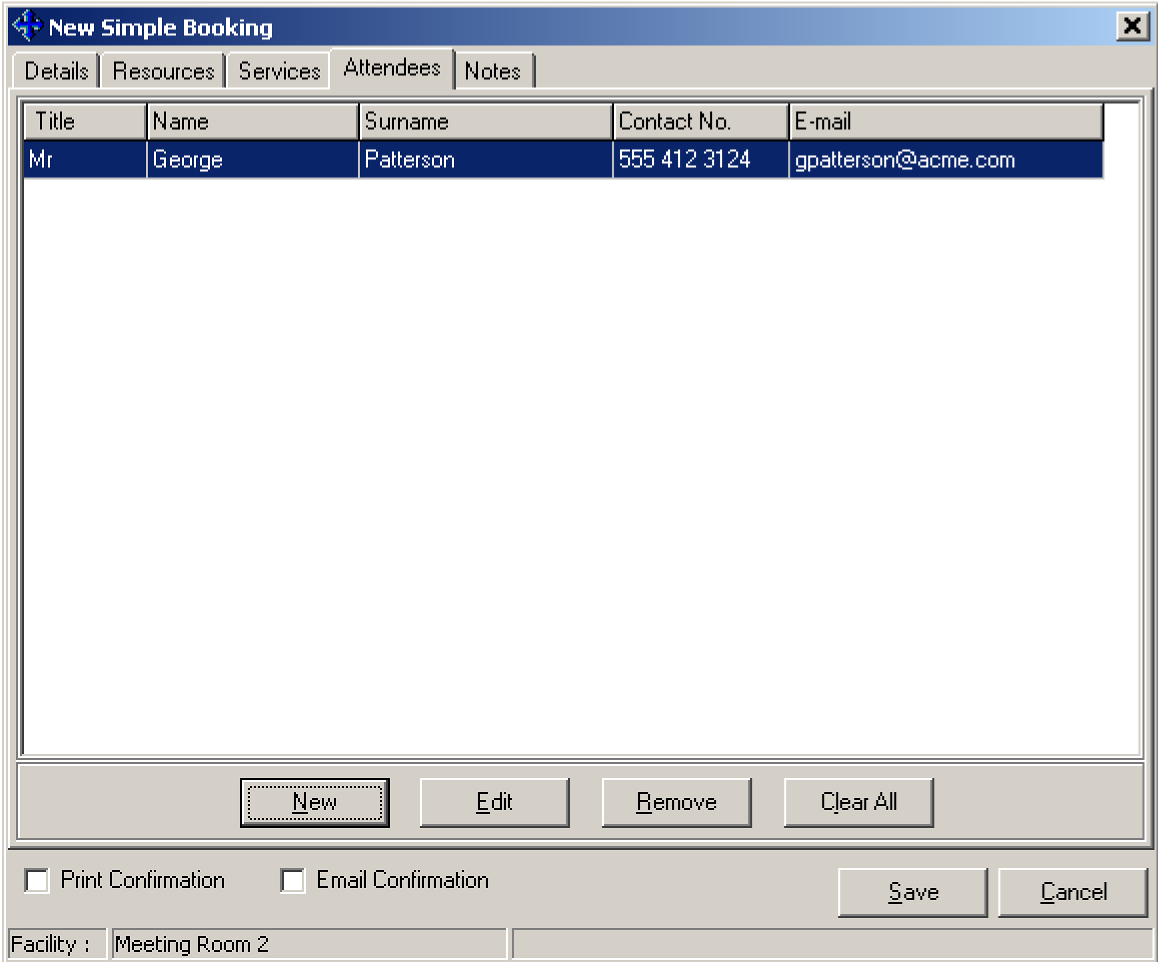


If the service is required at a different time to the facility you can enter a different start and/or end time here.

If you need to know a number in relation to the service (for things such as drinks or sandwiches), then you can enter the number here.

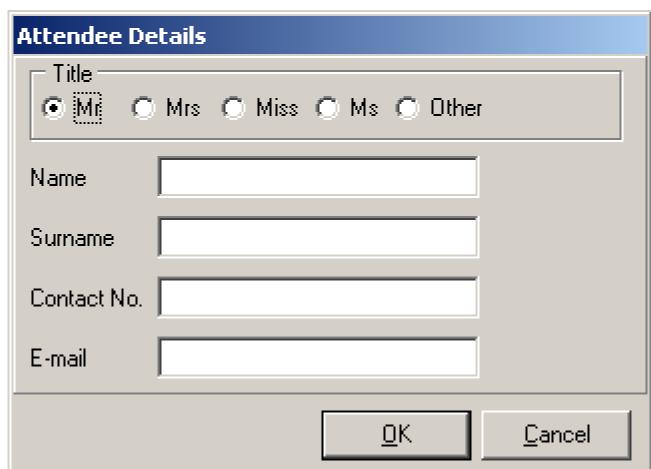
If you need further information in relation to the service (such as the type of sandwich) then you can enter that in the **Notes**.

If you have purchased the Attendees module you will have an **Attendees** page to enter the names and contact details of all the people who will be attending the meeting or session you are making this booking for.

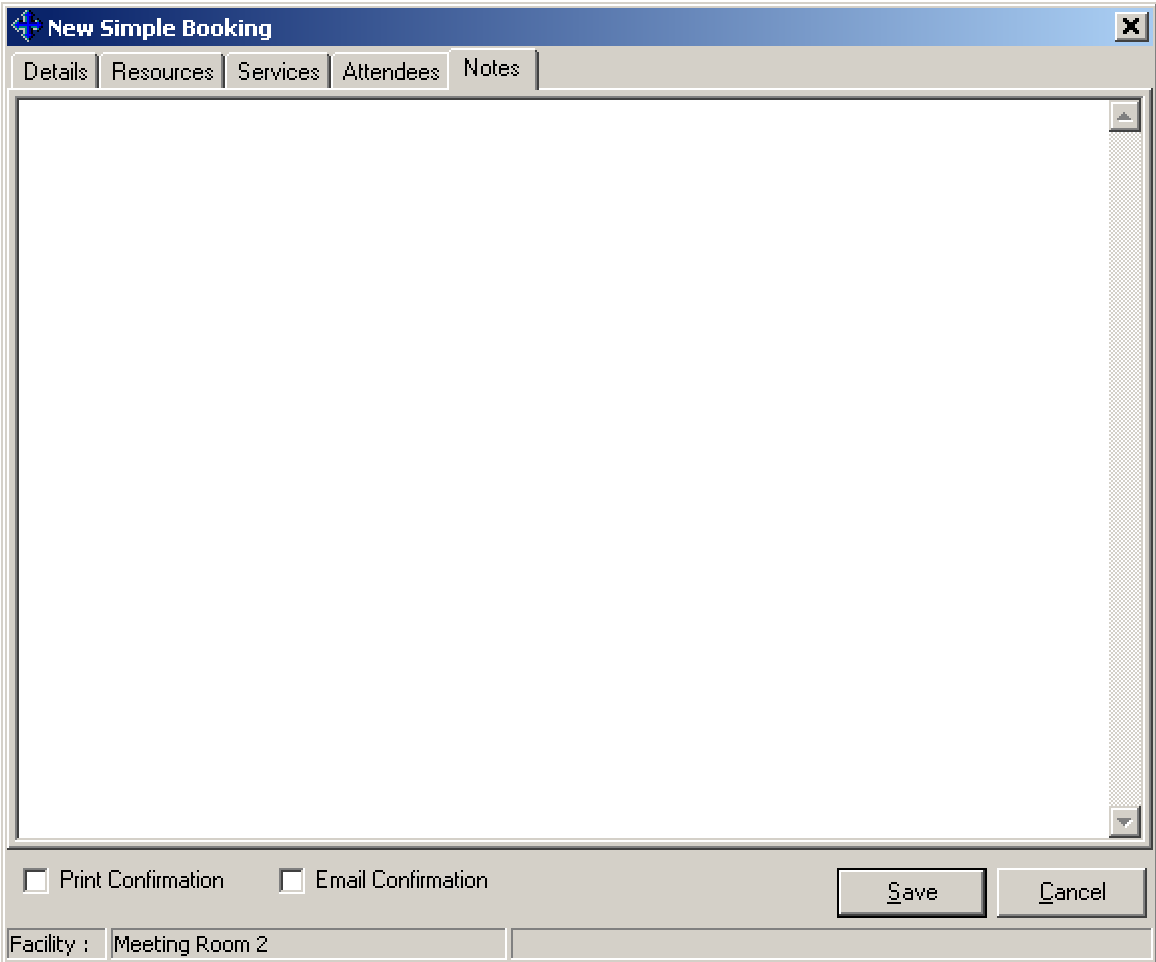


To add a new attendee click on the New button, to bring up the following window:

Enter the name of the attendee and, optionally, a telephone number and email address. If you have selected in the User Settings the attendees will be included in the list of recipients of the booking confirmation.



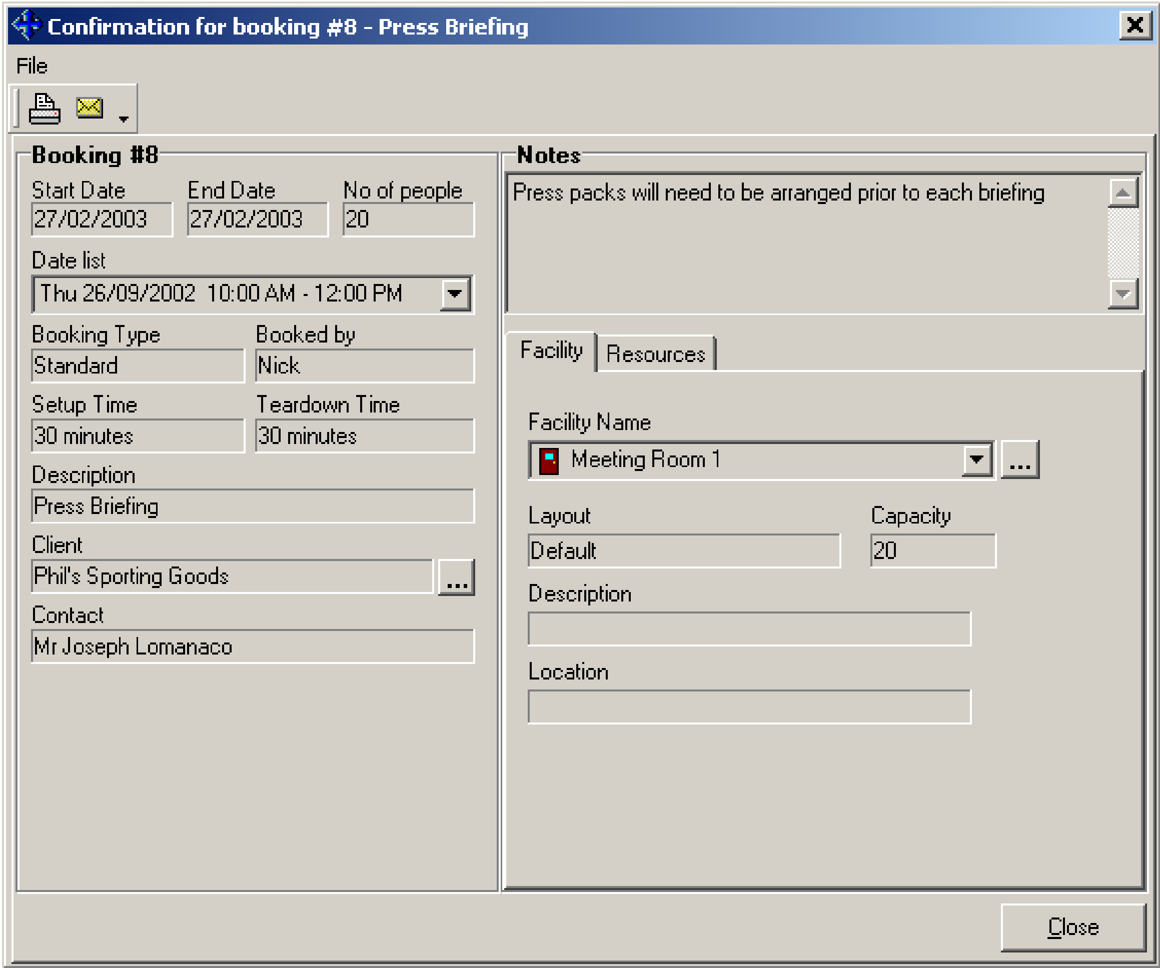
If you wish to record any further information about the booking you can record this in the **Notes** page.



Once you have completed all the information you need, click the Save button. At this point Libris will double-check that the facility and resources are available and then record the booking.

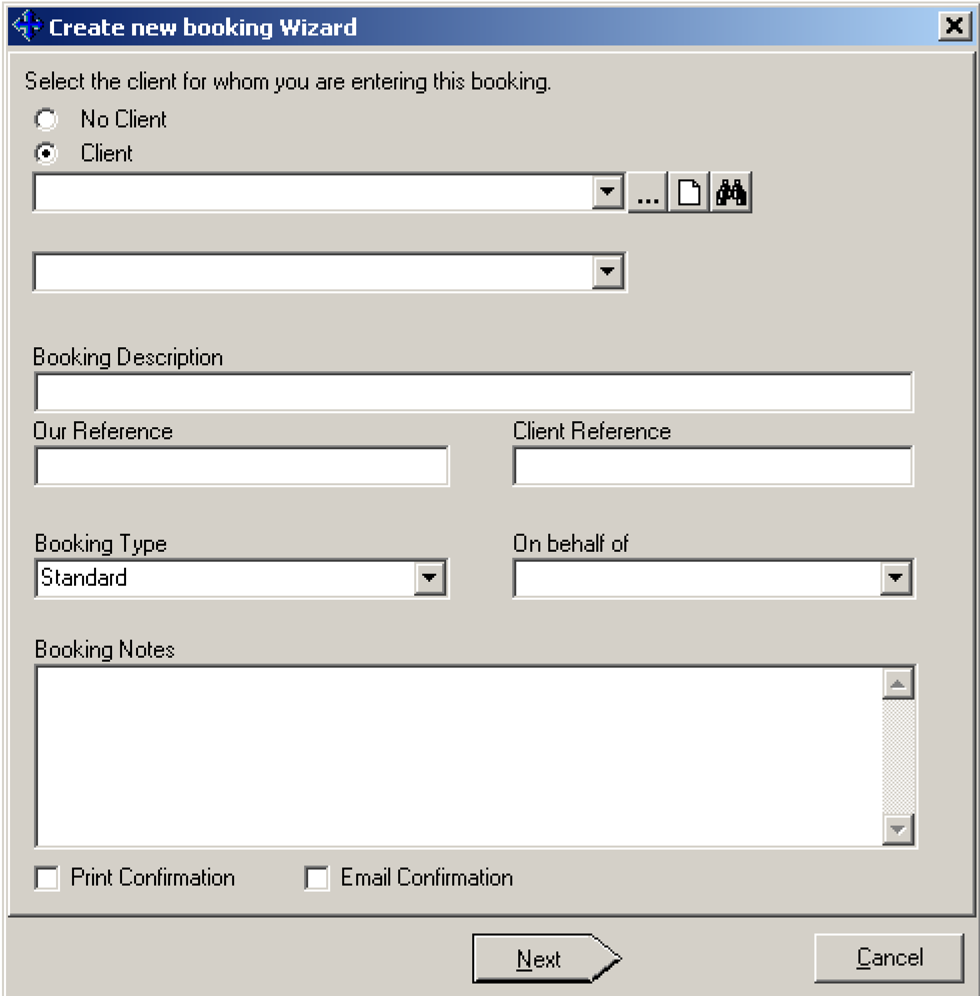
After the booking has been saved, if you have selected **Print Confirmation** a confirmation will be printed and, if you have selected **Email Confirmation** a confirmation email will be sent to all the parties in the booking (subject to the User Settings). See Chapter 7. for further details about booking confirmations.

Then a booking view will appear to allow you to review the information:



5.3 Booking Wizard

Unlike the **Simple Booking**, the **Booking Wizard** enables you to book more than one facility with one booking. The Booking Wizard asks you to select the date(s) and times you wish to book and will then allow you to select from those facilities that are available at the time(s) selected.



First, you need to enter the basic booking information: the client, description, references, booking type, "on behalf of", notes and confirmations, as per the Simple Booking.

a. No Client/Client
If there is no client associated with this booking select **No Client** otherwise select **Client**. You can opt to have only one of these options available or choose which one you wish to have selected as the default through User Settings.

b. Client Name
If you have select to have a client associated with this booking then you can either pop up the list of clients and select the client or start typing the client name into this box, Libris will find the first client that matches the letters you type until it finds the one you want. You view the details of the client you have selected by clicking on the ... **Client Details** button. Alternatively, if you do not know precisely the name of the client you are looking for you can use the **Find Client** button. If the

booking is for a new client you can enter the details from here by clicking on the  **Add New Client** button, see Chapter 10 for details on how to enter the client details.

c. Client Contact
If the client has more than one contact you can select which contact from the client you are making this booking from the list of available contacts.

d. Our Reference
If you have a reference for the booking then enter it here.

e. Client Reference
If you have a client and they have a reference for this booking then you can enter it here.

f. Booking Description
Enter a description of the purpose of the booking. This description will be shown on confirmations and the booking chart on the main screen (depending on User Settings).

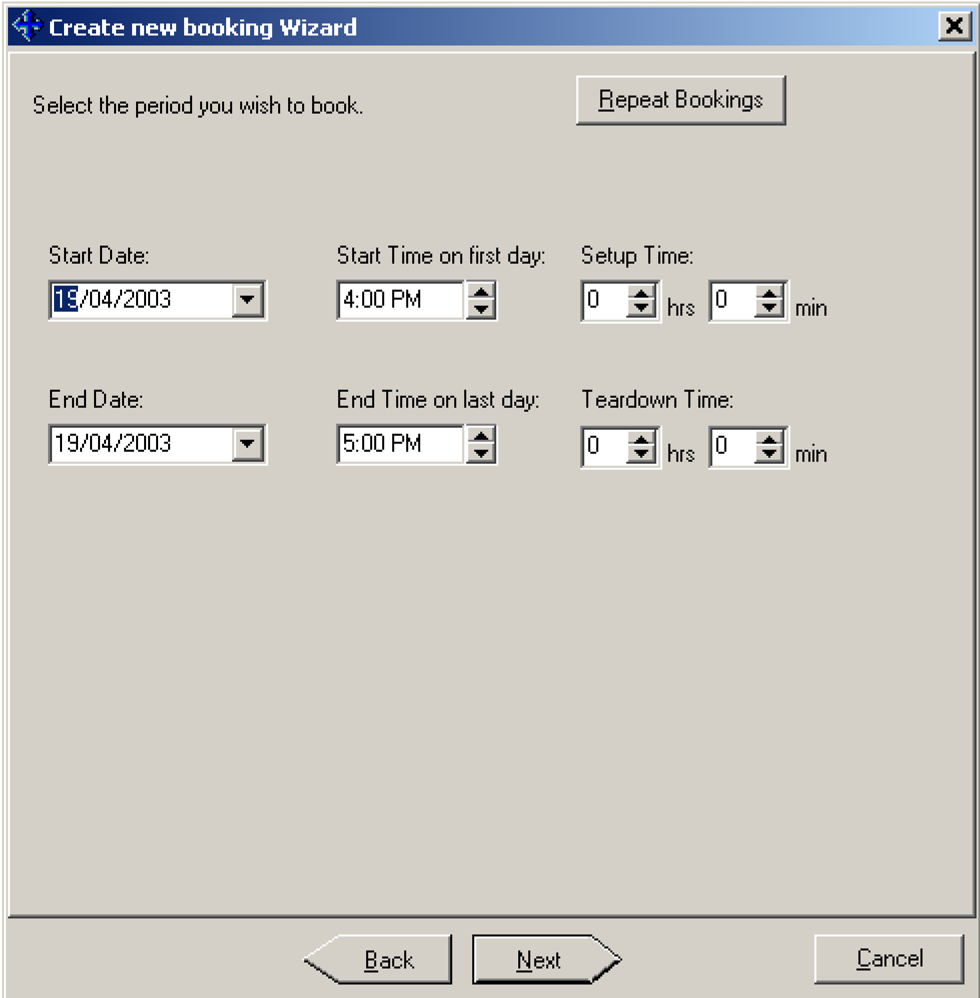
g. Booking Type
Select the type of booking from the list. The colour associated with the booking type will be used to determine the colour of the booking in the booking chart.

h. On Behalf Of
If you are making this booking on behalf of someone else within your organisation, you can select anyone from the users list here.

i. Booking Notes
If you wish to record any further information about the booking you can record this here.

When you have completed this information, click the Next button to move on to the next page.

Next you are requested to enter the start date and time and the end date and time for the booking, with an amount of time for setting up and tearing down, if relevant.

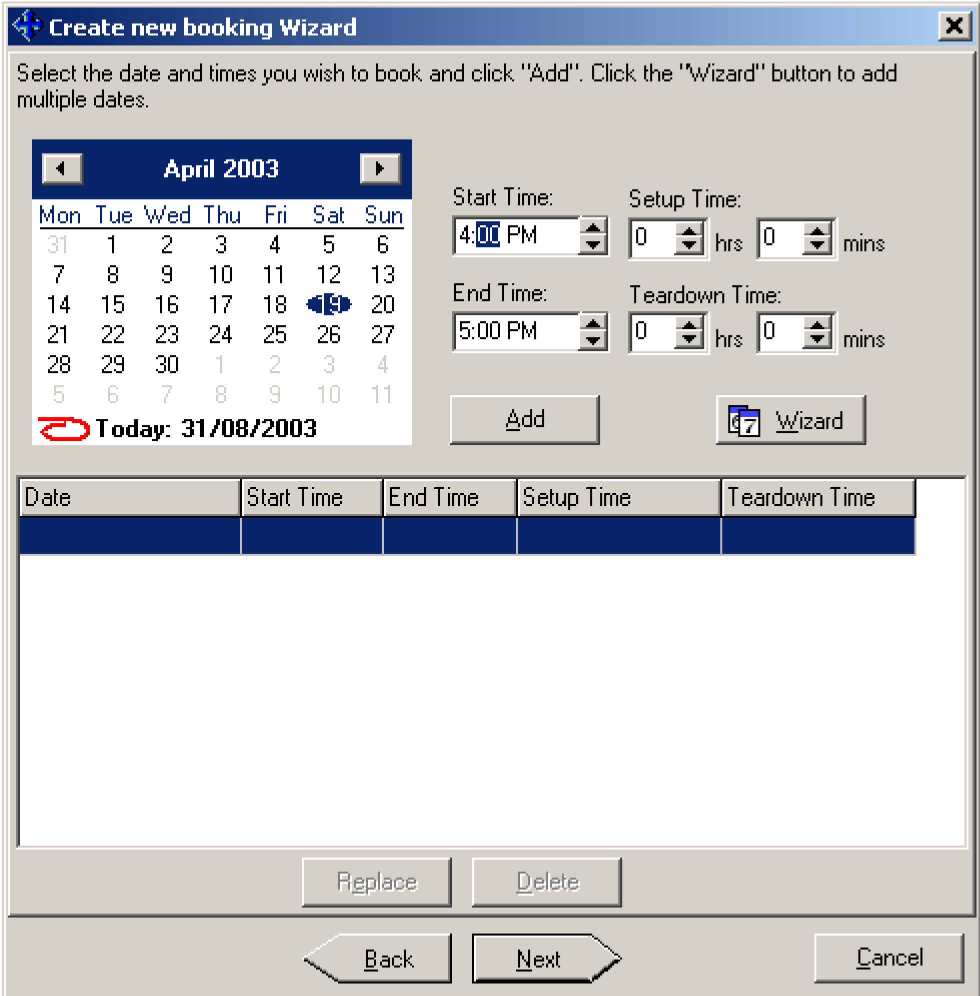


If your booking is required for a number of days then click on the Repeat Bookings button to switch to the Multiple Days page (see below).

Once you have entered the dates and times of your booking, click the Next button.

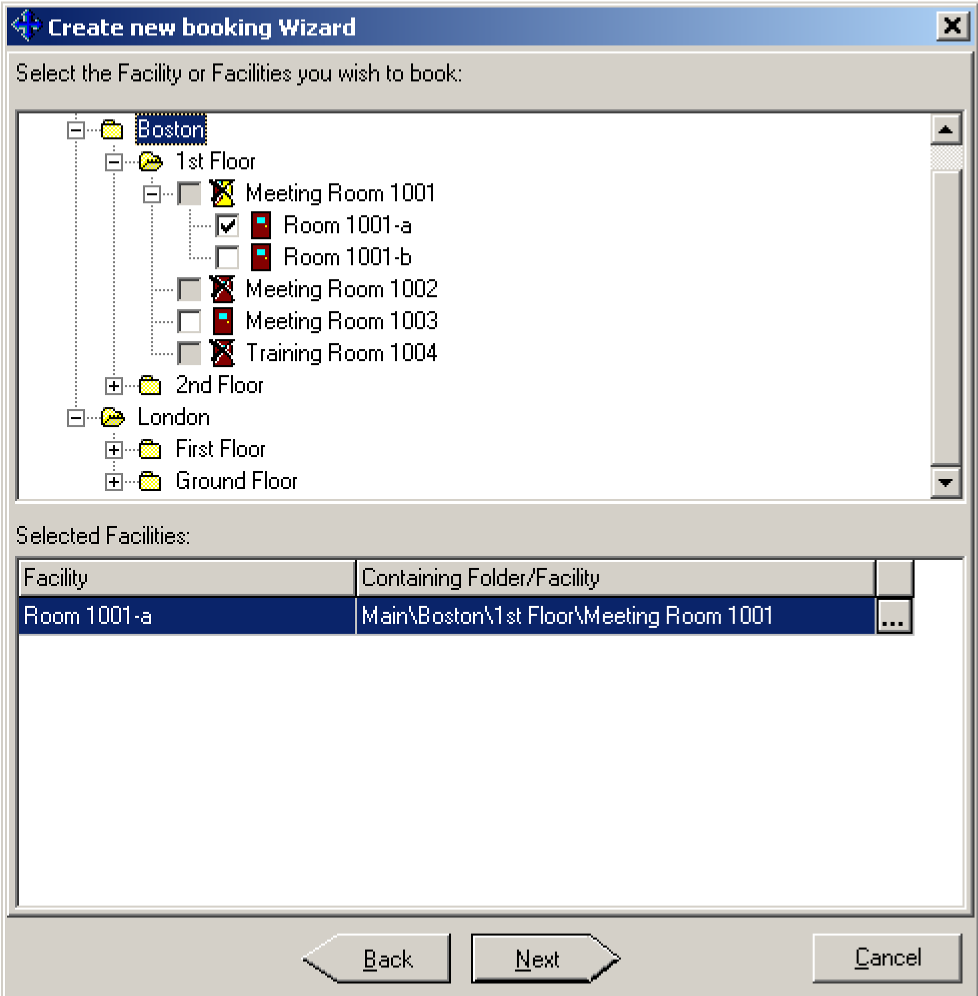
If you have selected the Repeat Bookings button you be moved on to the next page automatically.

On this page you can enter a series of dates and times.



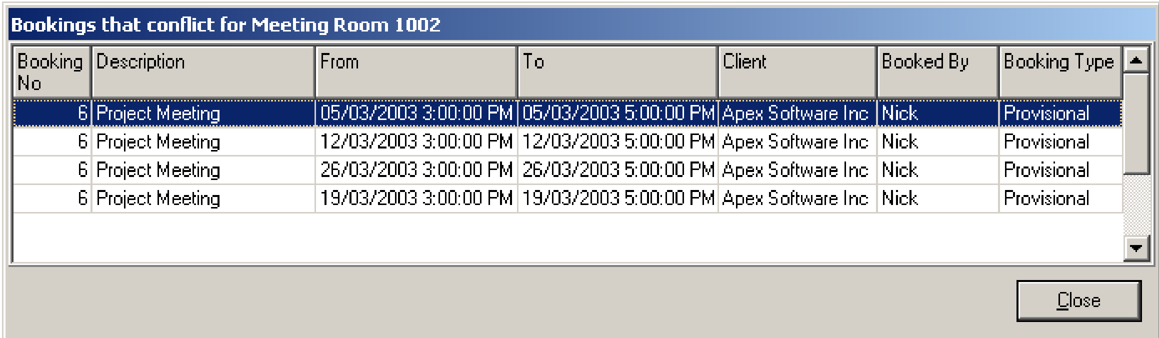
This works the same way as the **Multiple Bookings** page of the Simple Booking form. See the section 5.2 Simple Booking.

Once you have selected your dates and times you will now see the tree of facilities for you to select those that you wish to book.

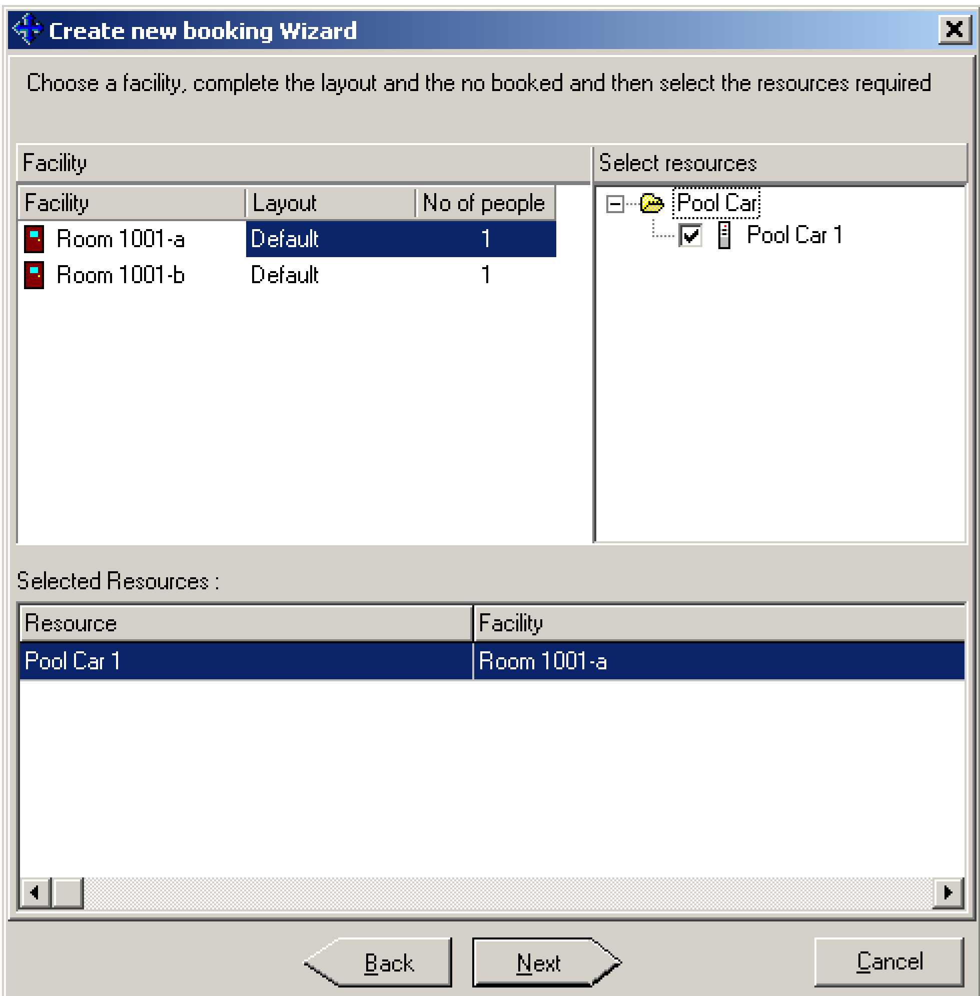


Tick the boxes next to the facility or facilities you require and they will be added to the list of **Selected Facilities** in the bottom half of the window. If you wish to see the details of a facility click on the  button next to it.

If a facility is unavailable for one or more of the dates and times you have selected you will not be able to tick the box next to it an the icon will have a cross through it , and a View Conflicts button will appear in top right of the window. If you click on the View Conflicts a window similar to the following will appear.



Once you have selected the facility or facilities you require click the Next button to move on to the next page.



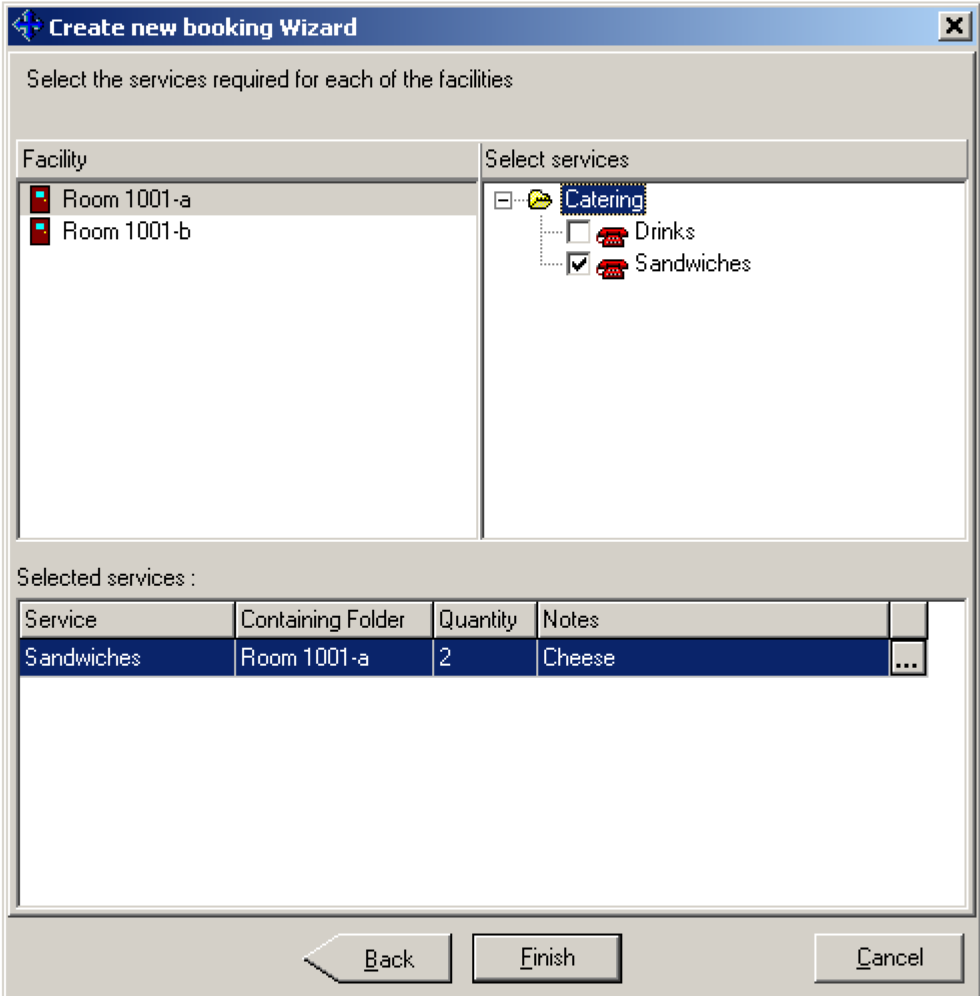
This page allows you select the layout and number of people for each facility you have selected. You can also select resources for each facility.

a. Layout
To select the layout, click on the layout next to the facility you wish to change, and you can then drop down the list of layouts available for that facility.

b. No of people
Click on the number next to the facility you wish to and change and you can then enter or select the no of people in that facility.

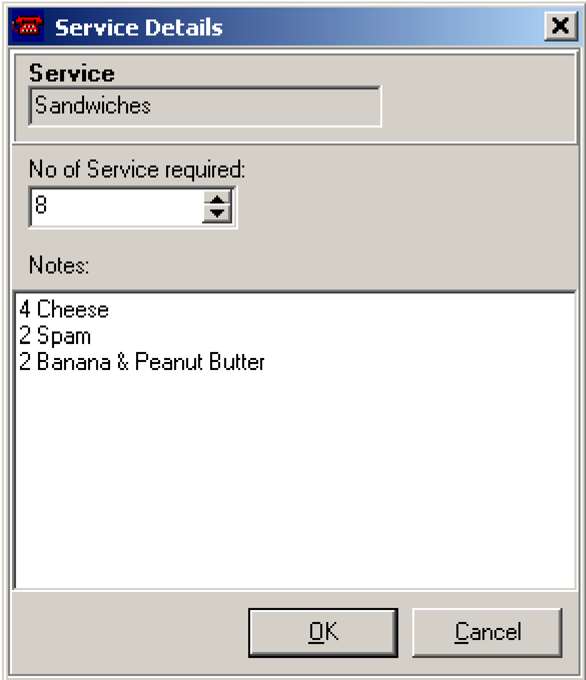
c. Resources
Click on the facility you wish to select resources for and you will then be shown a tree with the resources available for that facility. You will be shown a list of resources that are contained in either the **Main** folder or the folder that contains the facility you are booking (or the folder that contains the folder that contains the facility, or so on up the hierarchy). These resources will be grouped by resource type. Simply tick the resources you wish to book and they will be added to the list of selected resources at the bottom of the page. If a resource has already been booked during one or more of the dates and times required, or one or more of the dates falls outside the Available From and Available To dates of the resource, you will not be able to tick that resource and the image next to it will appear with a cross through it .

Click the Next button to move on to the next page.



This page allows you to select the services you require in each facility you have booked.

First select the facility in the top left of the page. You will see a list of services that are contained in either the **Main** folder or the folder that contains the facility you have selected (or the folder that contains the folder that contains the facility, or so on up the hierarchy). These services will be grouped by service type. Simply tick the services you wish to book and they will be added to the list of selected services at the bottom of the page. If the service has been set up to require additional information (number required, different booking time and/or notes) a window will pop up for you to enter that information.



If the service is required at a different time to the facility you can enter a different start and/or end time here.

If you need to know a number in relation to the service (for things such as drinks or sandwiches), then you can enter the number here.

If you need further information in relation to the service (such as the type of sandwich) then you can enter that in the **Notes**.

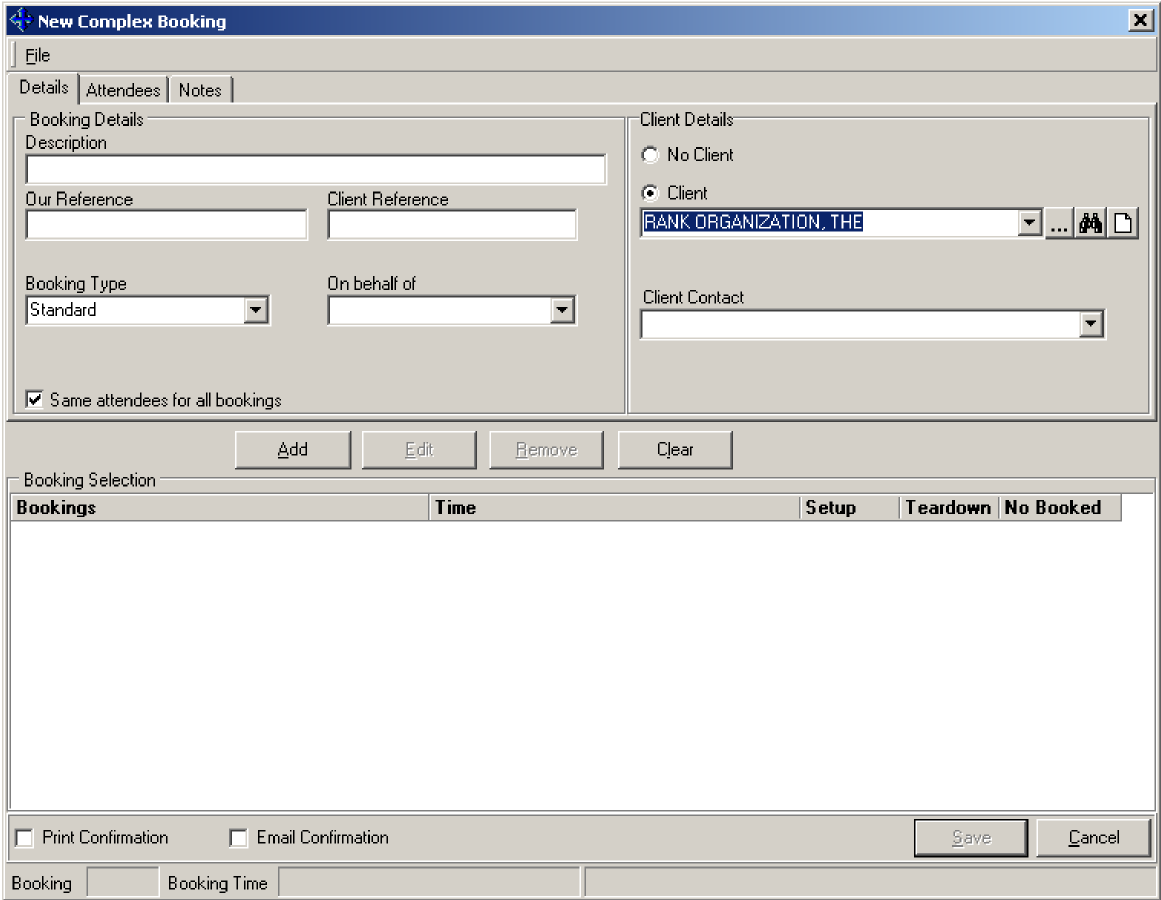
Once you have completed all the information you need, click the Finish button. At this point Libris will double-check that the facilities and resources are available and then record the booking.

After the booking has been saved, if you have selected **Print Confirmation** a confirmation will be printed and, if you have selected **Email Confirmation** a confirmation email will be sent to all the parties in the booking (subject to the User Settings). See Chapter 7. for further details about booking confirmations.

Then a booking view will appear to allow you to review the information.

5.4 Complex Booking

If you wish to make a booking that has different facilities on different days, or has different resources and/or services on different days, or you wish to book a resource or service without a facility, then you need to use the **Complex Booking** form.



First, you need to enter the basic booking information: the client, description, references, booking type, "on behalf of", notes and confirmations, as per the Simple Booking.

a. Booking Description
Enter a description of the purpose of the booking. This description will be shown on confirmations and the booking chart on the main screen (depending on User Settings).

b. Our Reference
If you have a reference for the booking then enter it here.

c. Client Reference
If you have a client and they have a reference for this booking then you can enter it here.

d. Booking Type
Select the type of booking from the list. The colour associated with the booking type will be used to determine the colour of the booking in the booking chart.

e. On Behalf Of
If you are making this booking on behalf of someone else within your organisation, you can select anyone from the users list here.

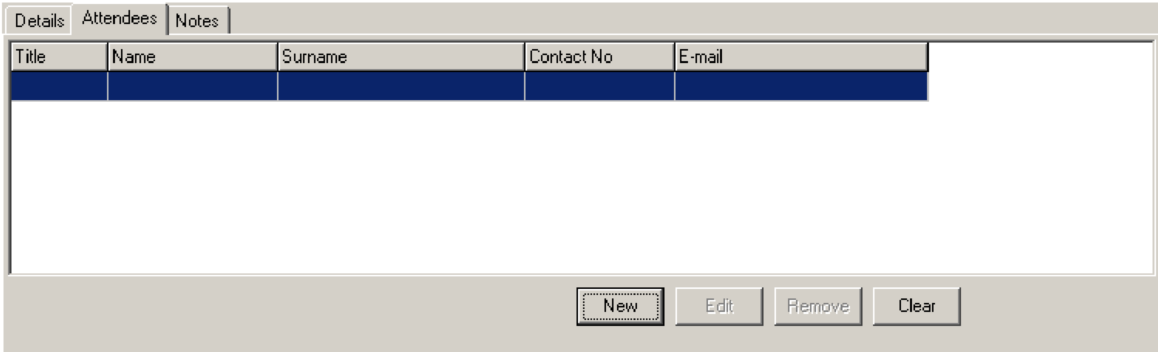
f. No Client/Client
If there is no client associated with this booking select **No Client** otherwise select **Client**. You can opt to have only one of these options available or choose which one you wish to have selected as the default through User Settings.

g. Client Name
If you have select to have a client associated with this booking then you can either pop up the list of clients and select the client or start typing the client name into this box, Libris will find the first client that matches the letters you type until it finds the one you want. You view the details of the client you have selected by clicking on the **Client Details** button. Alternatively, if you do not know precisely the name of the client you are looking for you can use the **Find Client** button. If the booking is for a new client you can enter the details from here by clicking on the **Add New Client** button, see Chapter 10 for details on how to enter the client details.

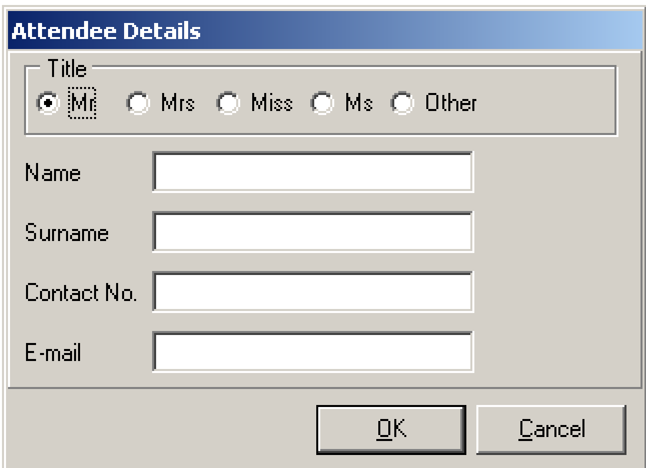
h. Client Contact
If the client has more than one contact you can select which contact from the client you are making this booking from the list of available contacts.

i. Same attendees for all bookings
If you have purchased the Attendees Module, you will see this option. You can between entering one set of attendees which relate to all dates and all facilities, or you can elect to enter different attendees for each facility and/or set of dates. If you tick this box you will see an **Attendees** page at the top of the window, if you do not have a tick in this box you will see an **Attendees** page on the Sub-Booking form that you get on clicking the **Add** button.

If you the Attendees Module and have ticked the **Same attendees for all bookings** box, as mentioned above, you can select the **Attendees** page as shown below. On this page you can enter the names and contact details of all the people who will be attending the meeting or session you are making this booking for.

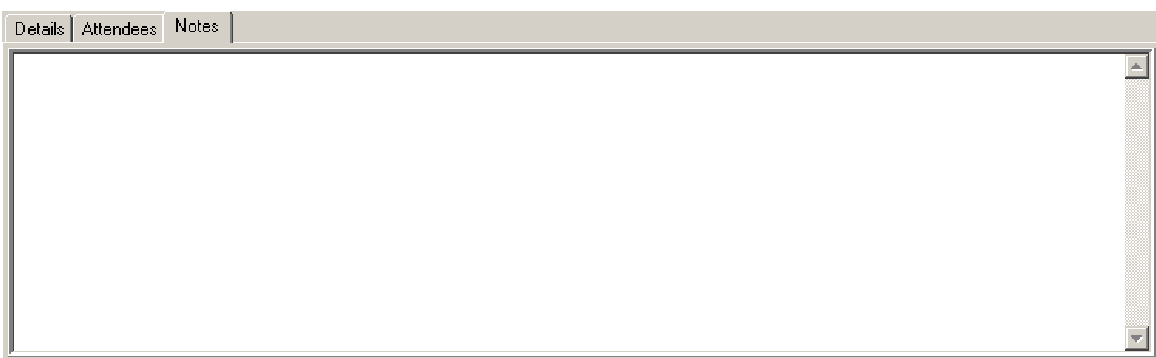


To add a new attendee click on the New button, to bring up the following window:

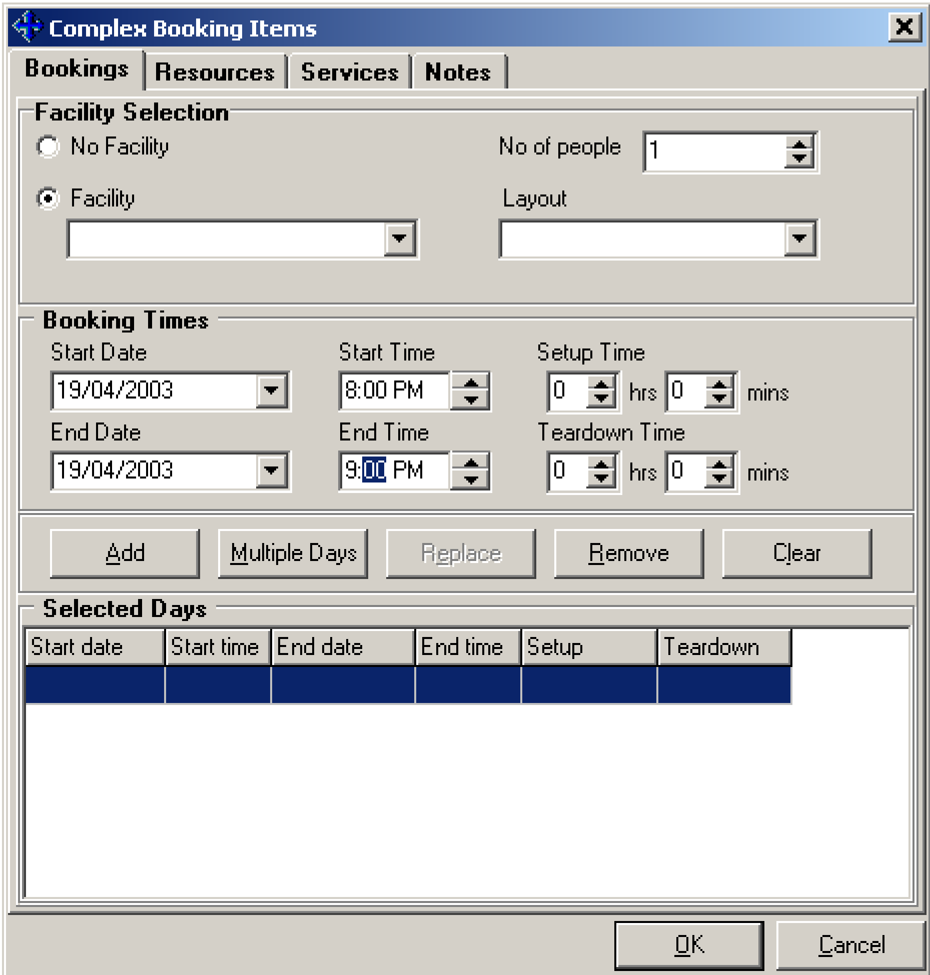


Enter the name of the attendee and, optionally, a telephone number and email address. If you have selected in the User Settings the attendees will be included in the list of recipients of the booking confirmation.

If you wish to record any further information about the booking you can record this in the **Notes** page.



Once have you recorded the basic details of the booking, you now start to enter the "Sub-Bookings" - details of the dates and times, facilities, resources and services you require. To enter a new Sub-Booking click on the Add button to get the **Complex Booking Items** window.



First select the facility you require, or **No Facility**, this facility is the one that will be booked for all the dates you enter in this window.

a. No Facility
   Select **No Facility** if you just wish to book resources or services.

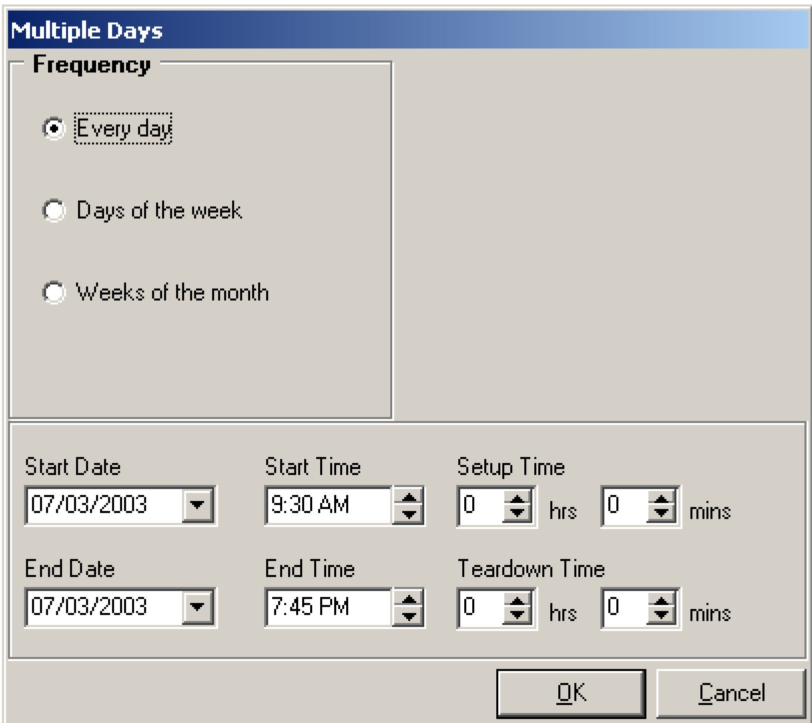
b. Facility
   If you have selected **Facility** click on the down arrow button on the left of the Facility box to pop up the tree of folders and facilities and select the facility you wish to book.

c. Layout
   If you have selected **Facility** pop up the list of layouts that are available for this facility and select the one you want.

d. No of people
   If the facility you are booking is a room then you may want to record how many

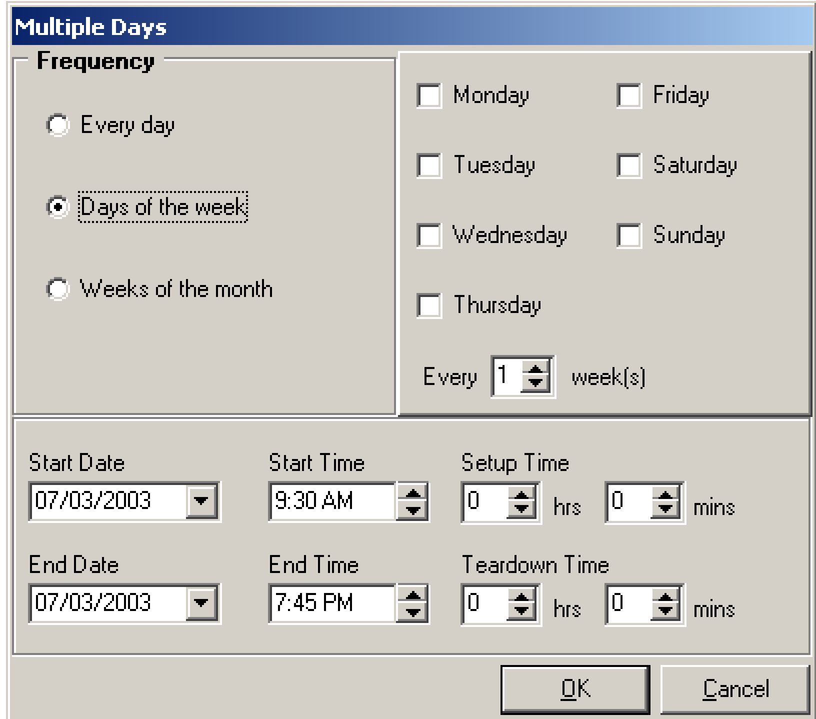
people will be using the room. This number is checked against the maximum capacity for the room (or layout) and if the number exceeds the capacity you will be warned or prevented from making the booking depending on your User Settings.

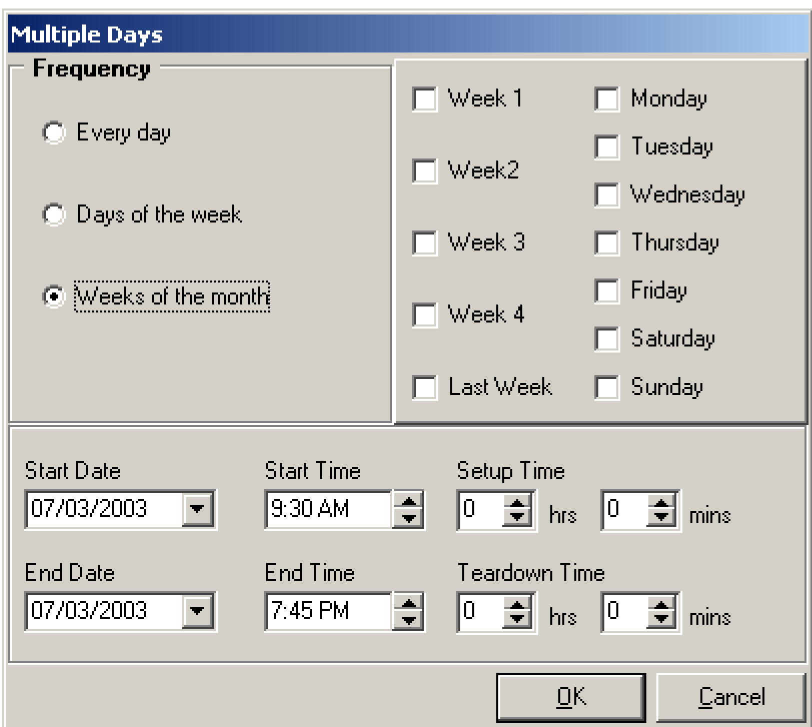
Now you can enter the various dates and time you wish to include in this booking. You can either add the dates one by one by selecting the date in the calendar in the top left corner and then selecting the start and end times, and the amount of time required for setup and teardown and then clicking the Add button; or you can add dates by using the date wizard by clicking on the Wizard button (see below). The dates and times you have selected will be displayed in the list in the bottom half of the page.



If you wish to add a booking for every available day between two dates, select **Every Day**, then select the start and end dates of the period and the times the booking will start and end on each day of the booking with the amount of time for setup and teardown on each day.

If you wish to make a booking once a week on the same day each week then select **Days of the week**. Click on the day of the week you wish to use then select the start and end dates of the period and start and end times as before. You can also choose to make the booking every fortnight or every 3 or more weeks by selecting the number of weeks in the **Every ... week(s)** box.



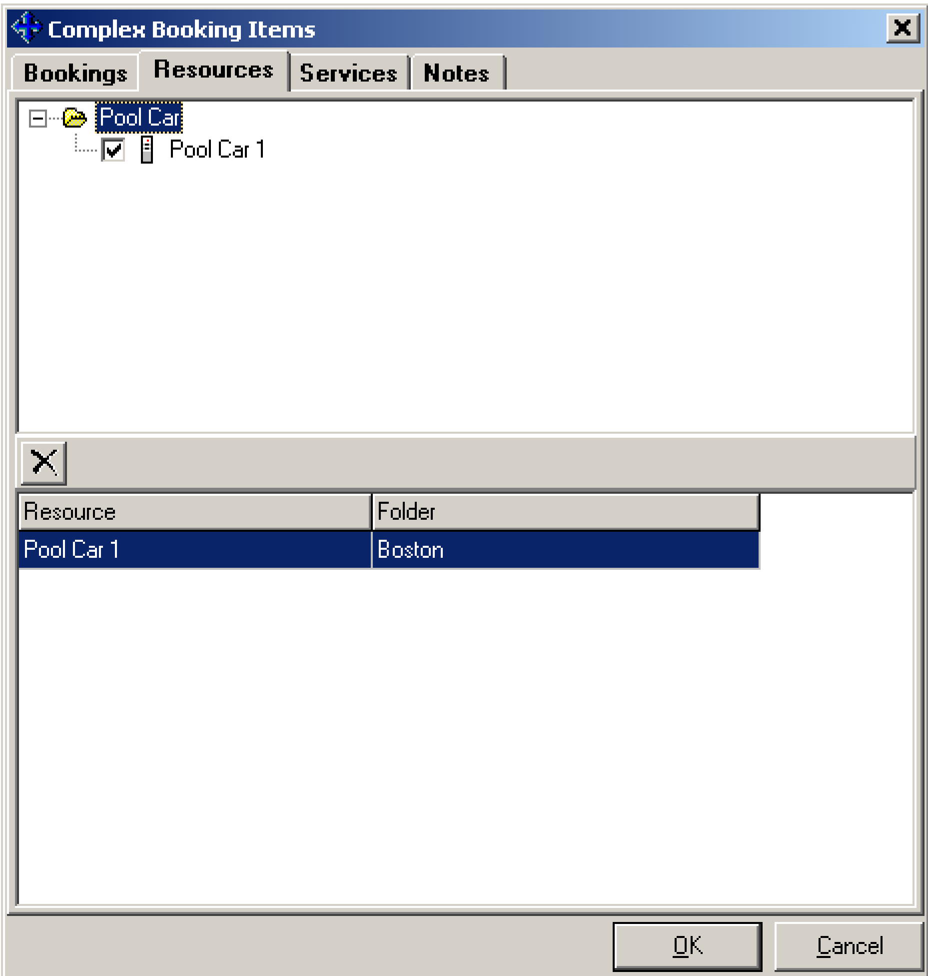


If your booking occurs on certain weeks every month then select **Weeks of the month**. Click on the day of the week you wish to use and the week or weeks you wish to use. For example, click Week 2 and Wednesday if you wish your booking to be every 2nd Wednesday, or click Last Week and Thursday if you wish you booking to be on the last Thursday of every month. Select dates and times as before.

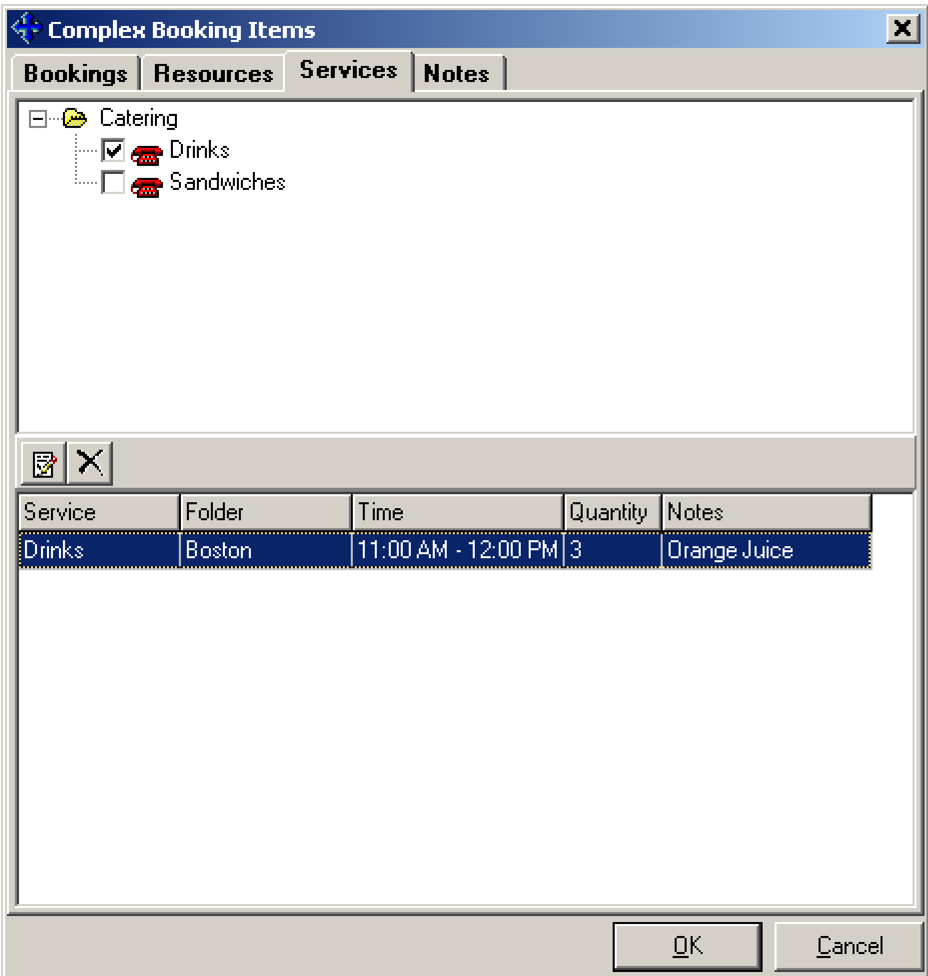
Click OK to add the dates and times to the list of dates on the booking form. If there is already a booking for one or more of the dates and times you have selected an error message will appear. Also, if one of the dates of the booking falls on a holiday that has been marked to **Prevent Bookings** you will get an error message. Such dates will not be added to the list but all the rest will be.

If you wish to change one of the dates and times added, double click on the row you wish to change to bring the details back into the top half of the screen, change the date and/or times and then click the Replace button. If you wish to remove one of the dates and times click on the row you wish to delete then click the Remove button.

Once you have selected the facility and dates you require you can then select any resources and/or services you need with or in this facility.



You can book resources that you wish to use with or within the facility that you are booking in the **Resources** page. When you select the Resources page you will be shown a list of resources that are contained in either the **Main** folder or the folder that contains the facility you are booking (or the folder that contains the folder that contains the facility, or so on up the hierarchy). These resources will be grouped by resource type. Simply tick the resources you wish to book and they will be added to the list of selected resources at the bottom of the page. If a resource has already been booked during one or more of the dates and times required, or one or more of the dates falls outside the Available From and Available To dates of the resource, you will not be able to tick that resource and the image next to it will appear with a cross through it .

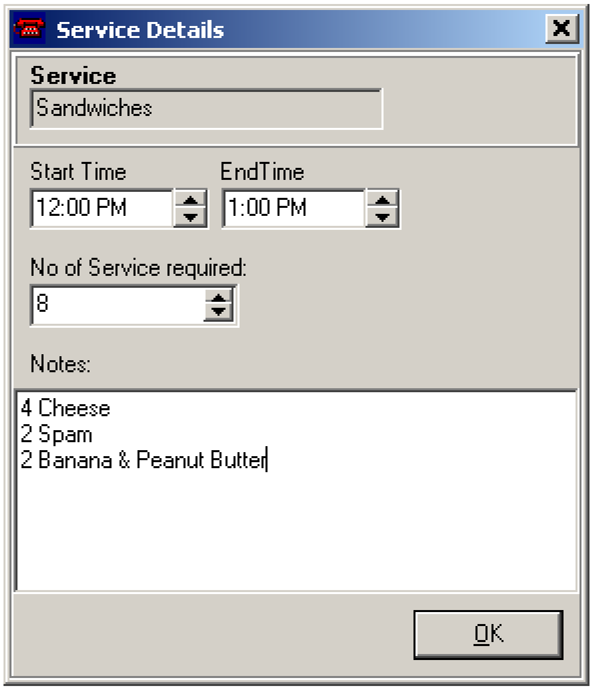


Similar to resources, services that you require with or in the facility can be booked on the **Services** page. You will see a list of services that are contained in either the **Main** folder or the folder that contains the facility you are booking (or the folder that contains the folder that contains the facility, or so on up the hierarchy). These services will be grouped by service type. Simply tick the services you wish to book and they will be added to the list of selected services at the bottom of the page. If the service has been set up to require additional information (number required, different booking time and/or notes) a window will pop up for you to enter that information.

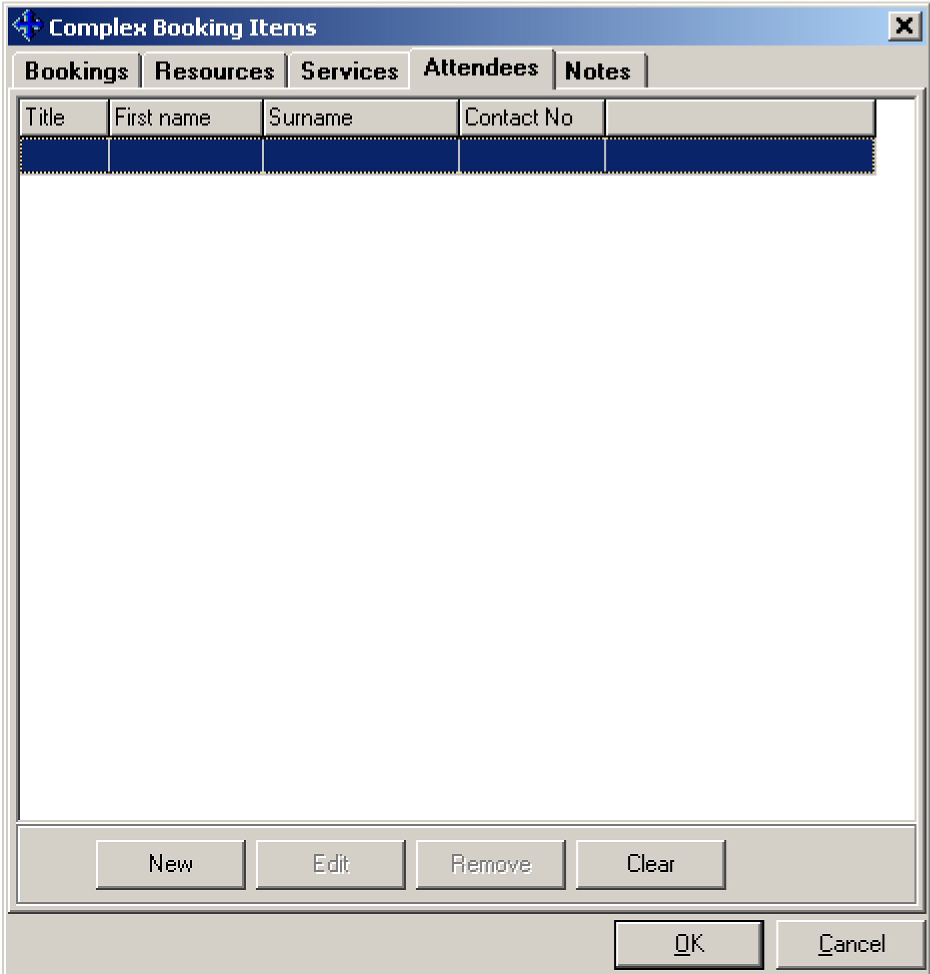
If the service is required at a different time to the facility you can enter a different start and/or end time here.

If you need to know a number in relation to the service (for things such as drinks or sandwiches), then you can enter the number here.

If you need further information in relation to the service (such as the type of sandwich) then you can enter that in the **Notes**.



If you have the attendees module and you have not selected **Same attendees for all bookings** then you can enter a list of attendees that relate to this Sub-Booking here (follow the instructions as above).



If you wish to record any further information about this Sub-Booking you can record this in the **Notes** page.

Once you have selected the facility, dates, resources and services that you require click OK and the booking information will be added to the tree of bookings on the main Complex Booking form. You can now book further facilities and/or dates with resources and/or services by clicking on the Add button again.

You can edit a booking for one facility on one date by clicking on the facility line underneath that date and then clicking the Edit button. You can then change the date, times, resources and/or services.

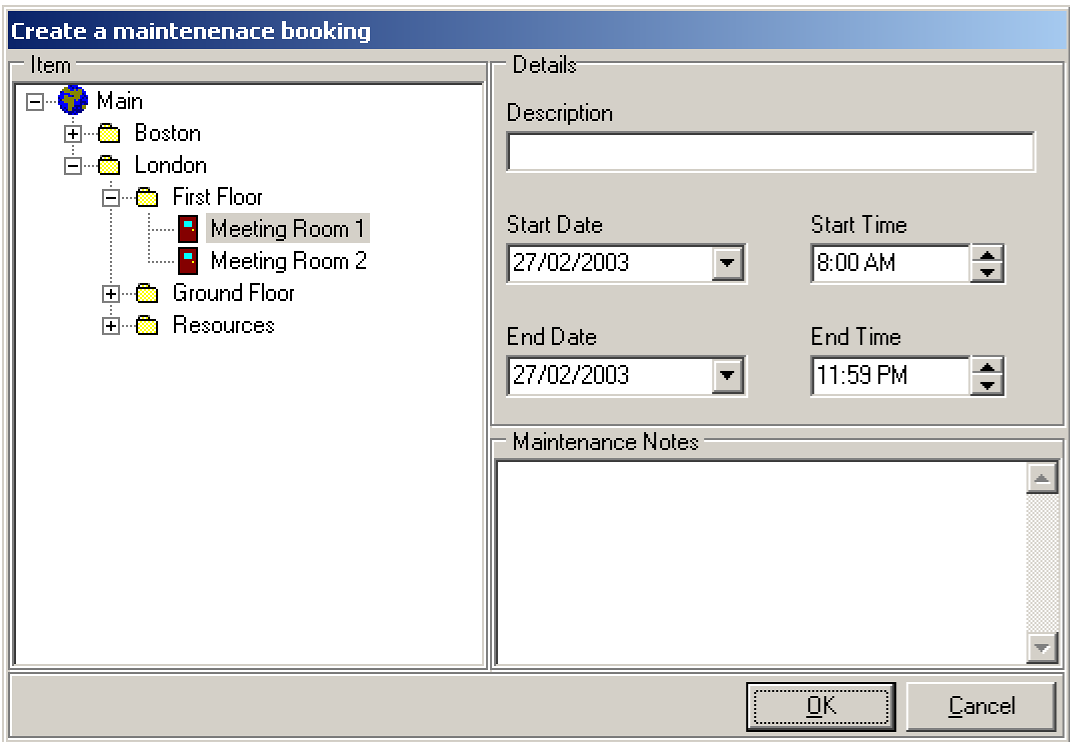
Once you have completed all the information you need, click the Finish button. At this point Libris will double-check that the facilities and resources are available and then record the booking.

After the booking has been saved, if you have selected **Print Confirmation** a confirmation will be printed and, if you have selected **Email Confirmation** a confirmation email will be sent to all the parties in the booking (subject to the User Settings). See Chapter 6. for further details about booking confirmations.

Then a booking view will appear to allow you to review the information.

5.5 Maintenance Booking

If you wish to make take a facility out of service for maintenance you can make a maintenance booking. A maintenance booking just requires you to enter a start date and time and an end date and time; you can also enter a description of the reason for the booking and some notes.

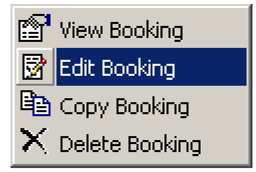


5.6 Making a change to a booking

If you want to make changes to an existing booking you can do so in two ways.

a. Find the booking in the **Booking Chart** on the main screen.

b. Point to the **Booking Bar** and **Right-click** to pull down a menu of choices:



c. Select **Edit Booking** to display the Booking Form that you filled in when you created the record, showing all the booking information that has been recorded to date.

d. Type in any information that you wish to add or change.

e. When you have made all your changes click on the **Save** button at the foot of the form.

Alternatively use one of the methods described in chapter 8. to find your booking and then click on the **Edit Booking** button.

If you have made a **Simple Booking** but need to adjust the details on one day of the booking, for example changing the facility or services required, you may want to change it to be a **Complex Booking**. To do this right click on the booking in the **Booking Chart** and select **View Booking**, once the booking details have come up click on the **Upgrade booking to a complex booking** button.

Similarly if you have made a booking using the **Booking Wizard** and need to change just one part of it, for example changing the facilities or resources booked on just one day of the booking, you may want to change it to be a **Complex Booking**. To do this right click on the booking in the **Booking Chart** and select **View Booking**, once the booking details have come up select **Edit as Complex Booking** from the **File** menu.

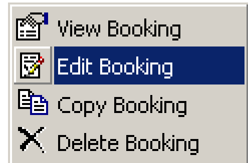
Warning:	Once you have switched a booking to being a complex booking you cannot change it back to being a simple booking or booking wizard booking.

5.7 Copying a booking

Sometimes you may wish to make a booking that is identical or similar to booking you have already made. As with changing an existing booking, first you need to find the booking you wish to copy.

a. Find the booking in the **Booking Chart** on the main screen.

b. Point to the **Booking Bar** and **Right-click** to pull down a menu of choices:



c. Select **Copy Booking** to display the Booking Form that you filled in when you created the record, showing all the booking information that has been recorded to date.

d. Change the dates and/or facilities and any other details you want to be different.

e. When you have made all your changes click on the **Save** button at the foot of the form.

Alternatively use one of the methods described in chapter 8. to find your booking and then click on the **View Booking** button, if you are viewing a simple booking then click on the **Copy Booking** button, otherwise select **Copy Booking** from the **File** menu.

5.8 Deleting a booking

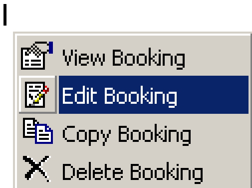
Occasionally you will need to cancel a booking, which means deleting the booking recorded in Libris.

If you just wish to delete one day of a multiple day booking, or delete on part of a complex booking you should follow the procedure in section 5.6. **Making a change to a booking** above.

To delete an entire booking:

a. Find the booking in the **Booking Chart** on the main screen.

b. Point to the **Booking Bar** and **Right-click** to pull down a menu of choices:



c. Select **Delete Booking** and you will be shown a booking view form with all the booking information that has been recorded.

d. If you are sure this is the booking you wish to delete click on the **Delete** button at the foot of the form.

e. If the User Settings have been set to send an email confirmation on cancellation, an email similar to the original email confirmation will be sent out notifying all relevant parties that the booking has been cancelled.

Alternatively use one of the methods described in chapter 8. to find your booking and then click on the **Delete Booking** button.

Chapter 6

Booking Confirmations

6 Booking Confirmations

Once you have made a booking you may wish to print out the details of the booking as a confirmation or to send an email to all the parties involved or providing services or resources.

To print out a confirmation either tick the "Print Confirmation" box on the booking form to get one printed as soon as you have clicked the save button, or, if you wish to print a copy later view the booking and select the **Print Confirmation** option from the File menu on the booking details form.

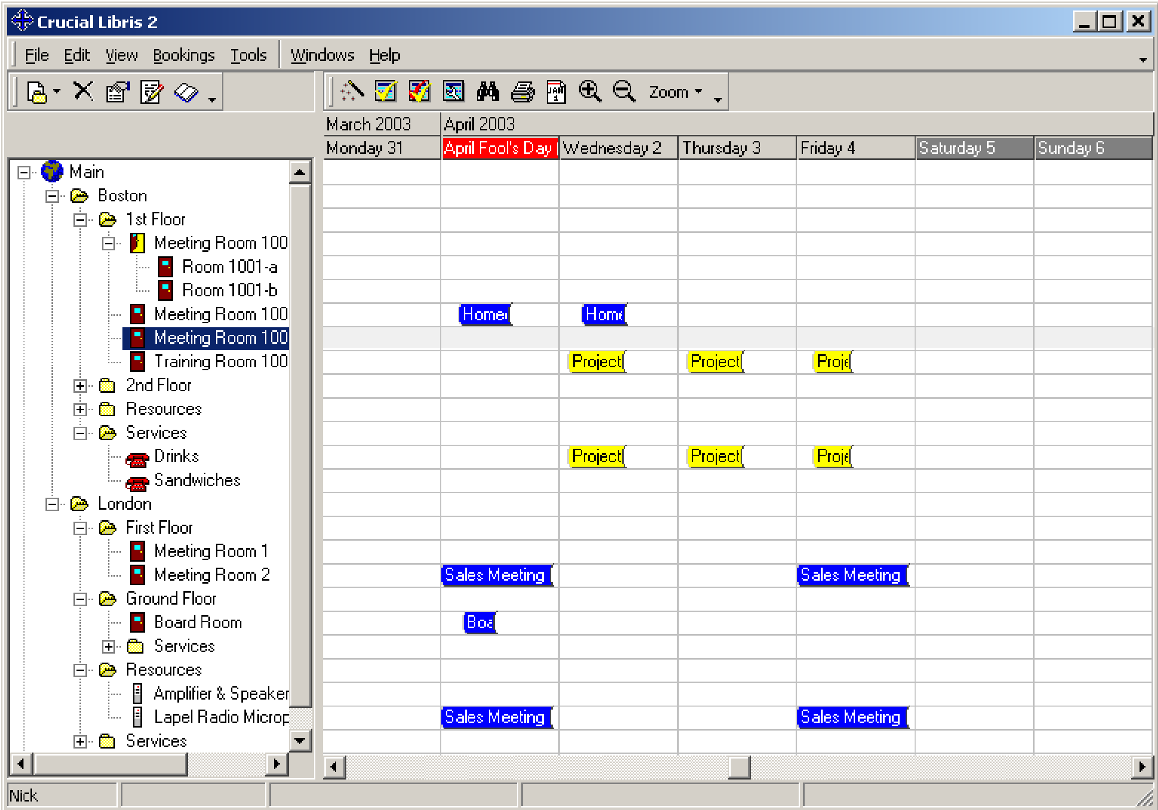
Similarly to send an email confirmation either tick the "Email Confirmation" box on the booking form to produce an email as soon as you have clicked the save button, or, if you wish to print a copy later view the booking and select the **Email Confirmation** option from the File menu on the booking details form. Depending on your System Settings the email will either be produced and sent without any user intervention, or else an email window will be displayed to enable you to add extra recipients or to adjust the text of the email.

It is possible to have alternate layouts for the confirmations, look on the Crucial Software web site for other options.

Chapter 7

Navigating the booking chart

7 Navigating the booking chart



Once you have set up some facilities and made some bookings you should see a screen similar to the one above.

On the screen, you can see only a relatively small part of the whole booking chart - there just isn't room there to show it all at a scale that would be legible.

You can imagine the complete chart as stretching unseen, beyond your monitor's screen, from a distant past on the far left to an as yet undetermined future on the right, the visible part showing, initially, today's date at the left of the window.

This section describes how to get to see the parts of the chart that are, at first, out of sight.

To look at past dates click on the arrow on the left of the base of the Booking Chart:

a. A click will move the Chart one hour or day to the right;

b. holding down the mouse-button will cause the Chart to continue to scroll (ie to continue to move) to the right until you release the button.

To look at future dates click on the arrow on the right of the base of the Booking Chart:

a. A click will move the Chart one hour or day to the left;

b. holding down the mouse-button will cause the Chart to scroll to the left.

To change the scale of the visible **Booking Chart** click on **Zoom** in the **Tool Bar**, to reveal a menu offering you **Day**, **Week** or **Month**:

a. **Day** will show a single day, divided into hourly sections, spread across the whole of the visible section of the chart;

b. **Week** will show a period of just over a full week, divided into days, (like the example above) and

c. **Month** will show a period of just over a month divided into days.

To enlarge the divisions on the scale click the **+ Magnifying Glass** button on the **Tool Bar**. Continue to click until you have the scale that you want.

Note:	If you increase the scale from one Week on screen, hourly divisions will first be shown when only about four whole days are visible.

To reduce the divisions on the scale click the **- Magnifying Glass** button on the **Tool Bar**. Continue to click until you have the scale that you want.

To move to a specified date in the present month:

a. Move the mouse pointer to any position on the **Time line** and click to reveal a calendar which shows the present month:

b. Move the mouse pointer to any date on the calendar and click *.* The Booking Chart will show that date on the left of the screen.

To move to a specified date in a another month:

a. Click on the **Timeline** to reveal a calendar showing the present month.

b. You can switch to another month by clicking on the left or right arrows at the top of the calendar, or you can click on the month name to pop up a list of months to switch to.

c. Move the mouse pointer to any date on the calendar and click *.* The Booking Chart will show that date on the left of the screen.

To return to today's date :

a. Click on the **Time line** to display a calendar.

b. Click on **Today** at the foot of the calendar.

Chapter 8

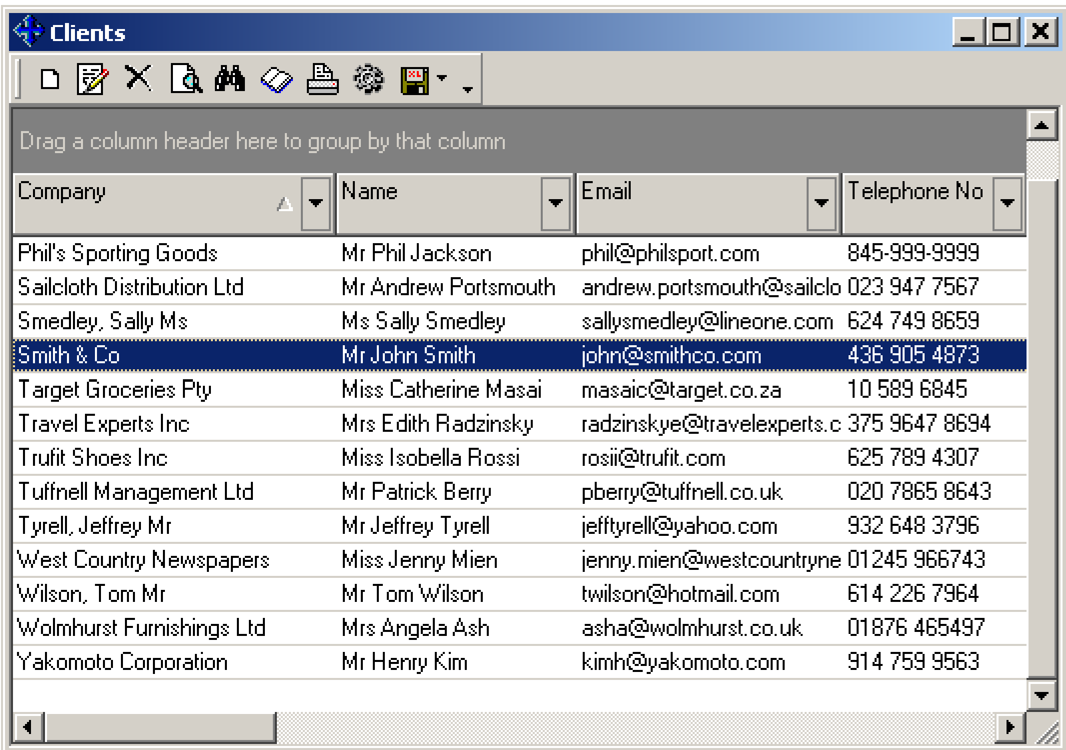
Clients

8 Clients

Libris has the facility for creating a permanent list of clients. This provides you with a single reference that you can add to and change whenever necessary, and can ensure that, whenever you make a booking, or are in contact with your client, you always have the most up-to-date information available to you.

It gives you, for example, the name and status of your contact, and keeps postal and email addresses. It also gives you space to make and keep any notes and reminders that you would like to have available whenever you are talking with your contacts.

8.1 The Client List

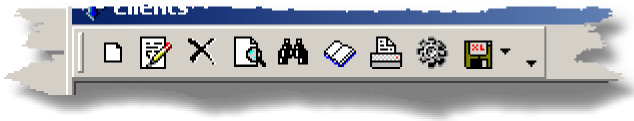


To display the Client List select **Tools** ⇨ **Client** from the **Menu Bar** on the main form.

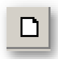
The list that you see has two functions:

a. it shows brief information about each client, and

b. it is a convenient way to access the full record in order to see more information or to make changes to it.



At the head of the Client List there is a Tool Bar which enables you to add to or change, search or print out the list. The functions of the buttons are described below.

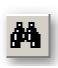
 Click the new (empty) page button to create a new Client.

 This button opens an existing Client to enable you to make changes to it.

 This button deletes the Client, and should, naturally be used with caution as it may remove information to which you would later wish to refer.

 This button allows people simply to look at a Client without making any changes to them at all.

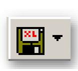
> **Note:** *In an environment in which several people have access to Libris records, the first three buttons can be made unavailable to people who should have viewing rights only; so that changes to the list may only be made by those who have Supervisor or Booking Manager status. See chapter 11. Access Security for more information.*

 This button, when clicked, gives entry to a Client Search facility which is described later in this section.

 This button leads to the Booking Search facility which is the subject of the next section.

 This button gives access will print out the Client List as it appears on screen.

 This button opens a window in the lower right corner of the Client List, which enables you to add and/or remove columns from the client list.

 This button accesses a facility for transferring the Client List, as a file, to another application, having been reformatted appropriately.

When your client list has grown to a size that makes it difficult to scan it all, you may need to use the client search (detailed in section 8.3 **Searching for Clients** below), or by re-sequencing the Client List.

To re-sequence the Client List:

a. Choose the column by which you wish to re-sequence the list (for example, the Client Number)

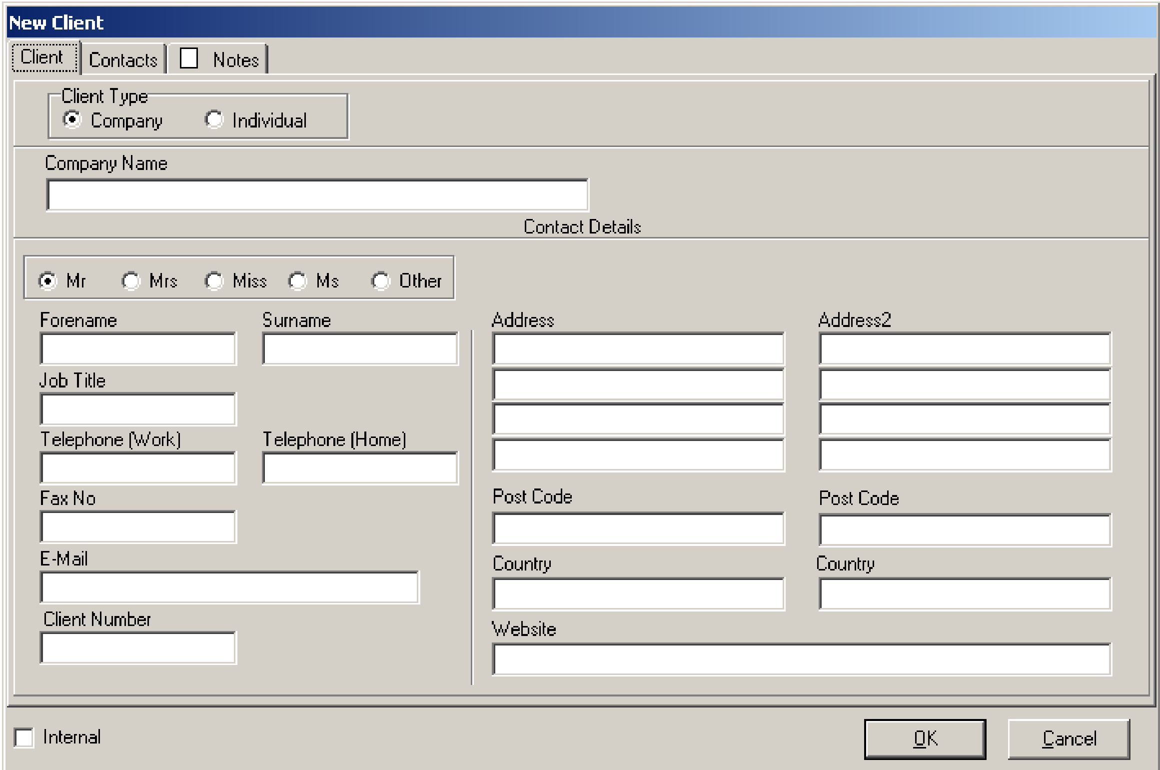
b. On the Title Bar, just above the list, click on the column heading of your chosen column.

The list will be immediately re-sequenced and a small indented arrow mark will be left on the Title Bar, upward for an ascending sort, and downward for a descending sort. Starting with the arrow pointing upwards, its direction, and the sequenced of the list, will be reversed with each subsequent click.

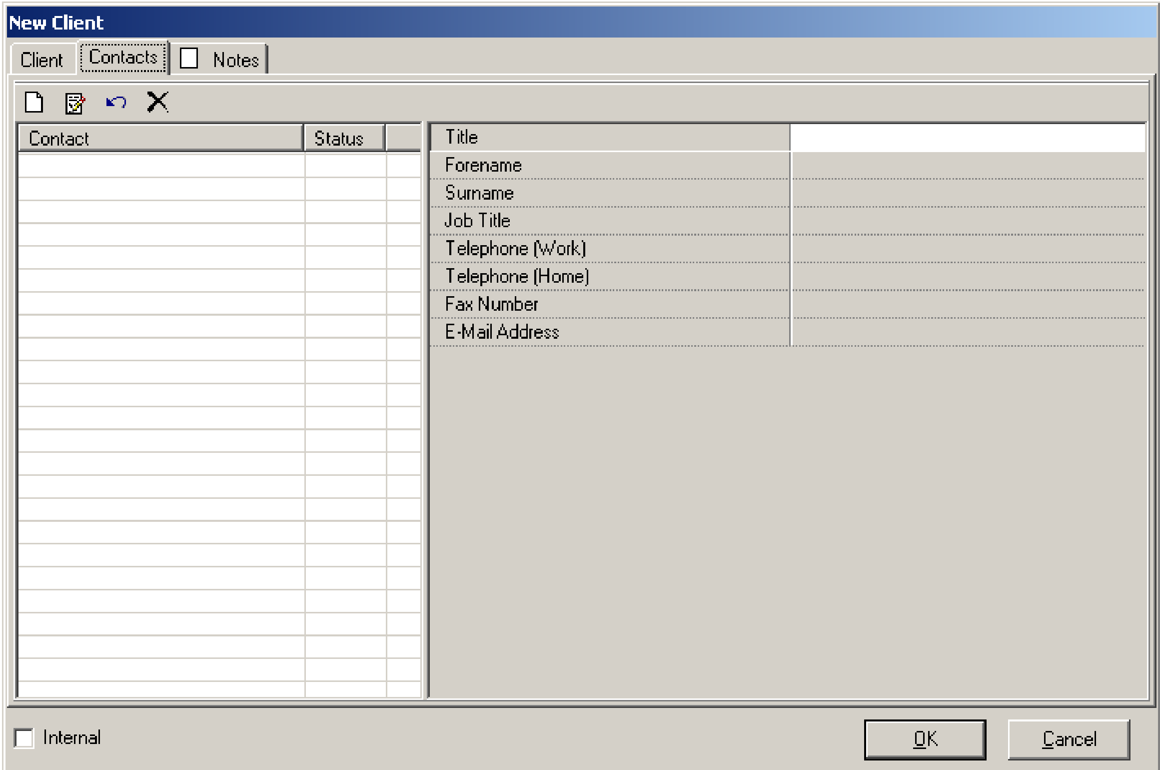
Note: You may also rearrange the columns by dragging (hold down the left mouse button and move the mouse) the column headings.

8.2 New Clients

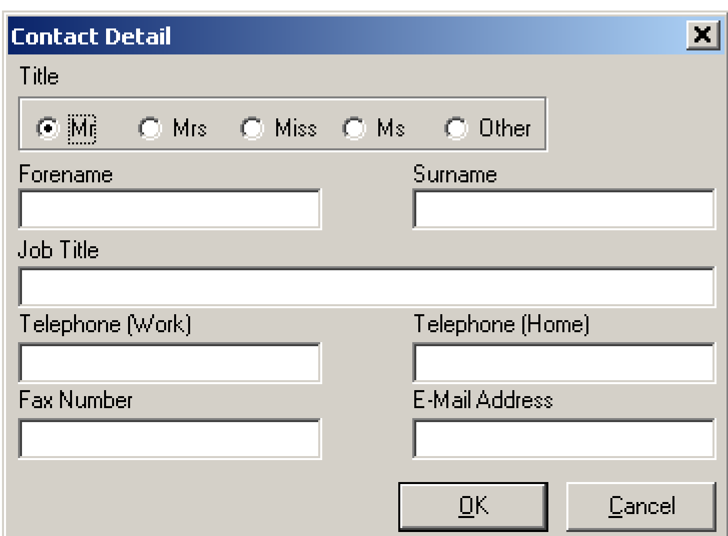
You can enter new clients from 2 places, either select the **Clients** option from the **Tools** menu on the main screen to bring up the Clients windows and then click on the **New Client** button, or else click on the **Add New Client** button on any booking form. Once you have done this you will see the New Client form.



Here you can select whether the client is a company or an individual and then enter the relevant details including up to 2 addresses. On this page you can enter the details of the main contact but you can also enter additional contacts by clicking on the **Contacts** tab at the top of the form to see the Contact pages.



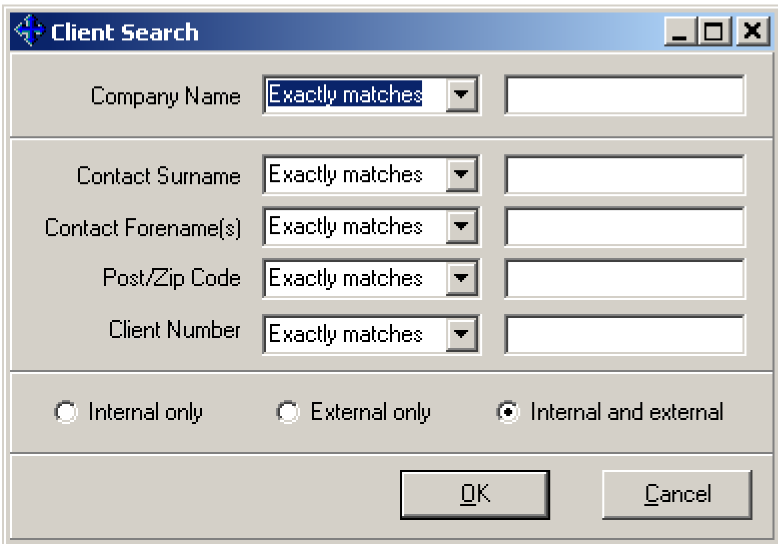
Here you can enter additional contacts, change their details or delete contacts who are no longer with the client. If you click on the  **New Contact** button you will see the New Contact window.



Here you can enter the details of the contact plus their contact details. Then click OK to save them.

8.3 Searching for Clients

On the Tool Bar above the Client list, click on the Client Search button to reveal the Client Search Form, which enables you to enter your search parameters:



Using the Client Search Form will deliver to you a Client List with a reduced number of entries according to how stringently you specify your requirements. If you know the exact name of the Company, for example, that may be enough to take you straight to your target. When there are several locations for the same organisation, you may be able to see the complete list; or you may want to see a single result and are able to narrow down your search by quoting a part of the Post/Zip Code.

The Search Facility that Libris offers you is very adaptable, and the more you use it, the more you will come to know how much or little you need to enter to get the results that you need, given the size of your Client List.

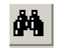
When you commence your search, you may or may not be able to remember the information you want to find your Client at once. For example, you may be able to remember only that it you are looking for a car dealership, containing the word "car" and that your contact's name reminds you of gin. Libris does not come equipped with a list of drinks, but it does allow you very easily to keep perming some name that contains "Cars" with Booth, Beefeater, Holland etc, until you remember Mr Gordon.

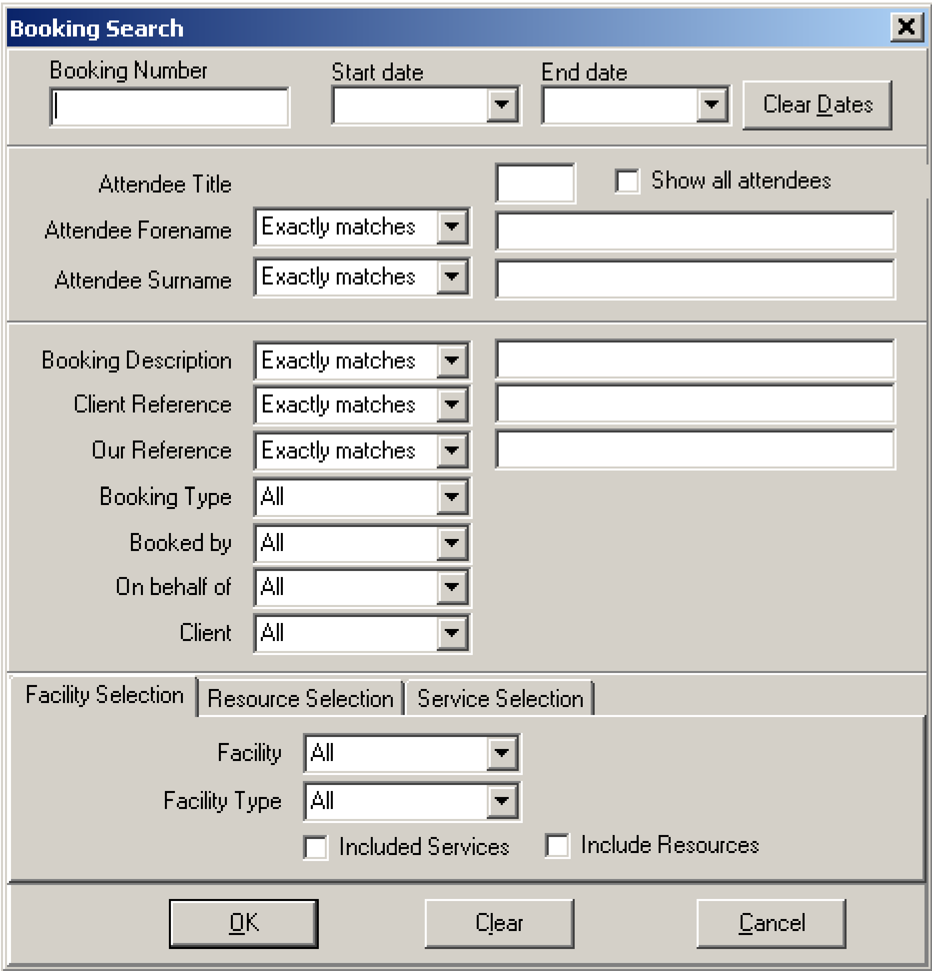
Chapter 9

Finding Bookings

9 Finding Bookings

9.1 Booking Search

To display the client search click on the Booking Search  button on the tool bar above the main booking chart.



The booking search gives you several different options in searching for a booking.

The main options are to view bookings of facilities, resources or services by choosing "Facility Selection", "Resource Selection" or "Service Selection" respectively. Additionally, if you have select "Facility Selection" you can also choose to include related service or resource bookings by ticking in "Included Services" or "Included Resources".

a. If you know the period in which you booking falls, or you wish to restrict your enquiry to a particular period then enter the"Start Date" and "End Date".

b. If you wish to see one particular booking and know the number then just enter the booking number.

c. Proceed by entering any pertinent information that would help identify your bookings such as:

i) Booking Description - This will generate a list of all bookings that include a matching booking description to the one entered. You can choose from three options: if you know the precise description of the booking then select "Exactly matches", if know how the description begins select "Begins with", or if you want to find all bookings that have one word or phrase somewhere in the description then select "Contains".

ii) Client Reference - This will generate a list of all bookings that match what you enter. This has the same options as the Booking Description.

iii) Our Reference - This will generate a list of all bookings that include a matching "Our Reference" as any entered on the booking form.

iv) Booking Type - This will generate a list of all bookings that include a matching "Booking Type" as any entered on the booking form.

v) Booked By - This will generate a list of all bookings made by a specific person.

vi) On Behalf Of - This will generate a list of all bookings that include a matching on behalf of entered on the booking form.

vii) Client - This will generate a list of all bookings that include a all bookings for a specific "Client" during that specific time period.

viii) Facility - If you wish to see bookings for just one facility or just the facilities in one folder, then select this here.

ix) Facility Type - Select the type of the facilities that you wish to see bookings in.

x) Resource - If you wish to see bookings for just one resource or just the resources in one folder, then select this here.

xi) Resource Type - Select the type of the resources for which you wish to see bookings.

xii) Service - If you wish to see bookings for just one service or just the services in one folder, then select this here.

xiii) Service Type - Select the type of the services for which you wish to see bookings.

If you have the attendees module you can also choose to see bookings with a particular attendee by entering:

xiv) Attendees Title - This will generate a list of specific bookings with the title of Mr. Or Ms.

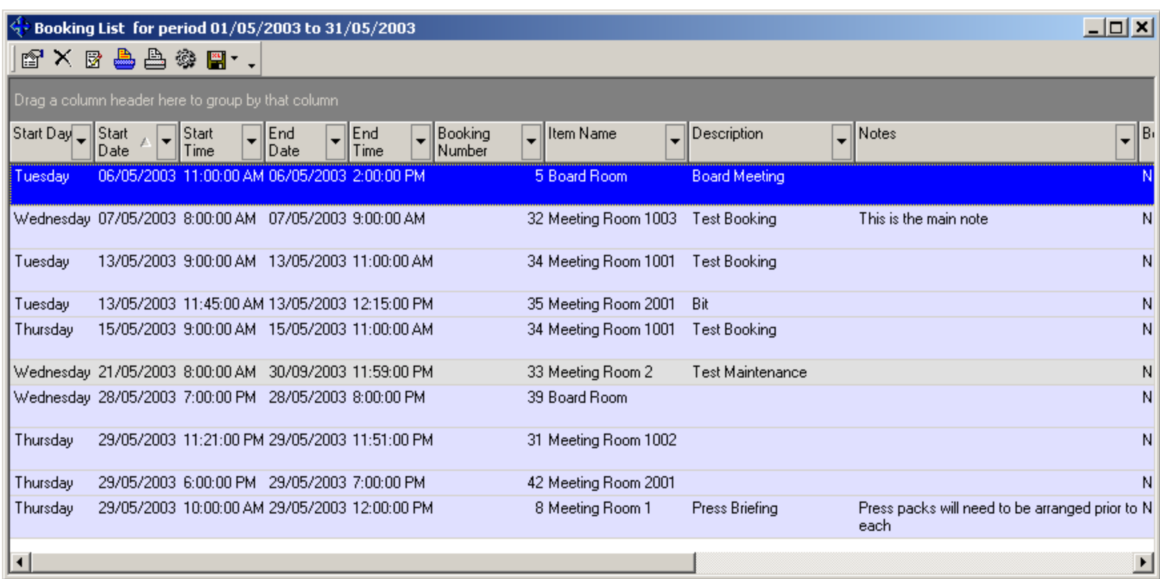
xv) Attendees First Name - This will generate a list of all booking that include an attendee with a matching first name.

xvi) Attendees Last Name - This will generate a list of all bookings that include an Attendee with a matching last name.

Once you have entered all of your pertinent information click on the OK button. You will then get a "Booking List" of bookings that match <u>all</u> of the criteria you have entered. You can sort, analyse and print the bookings that are found once the booking list appear, see below.

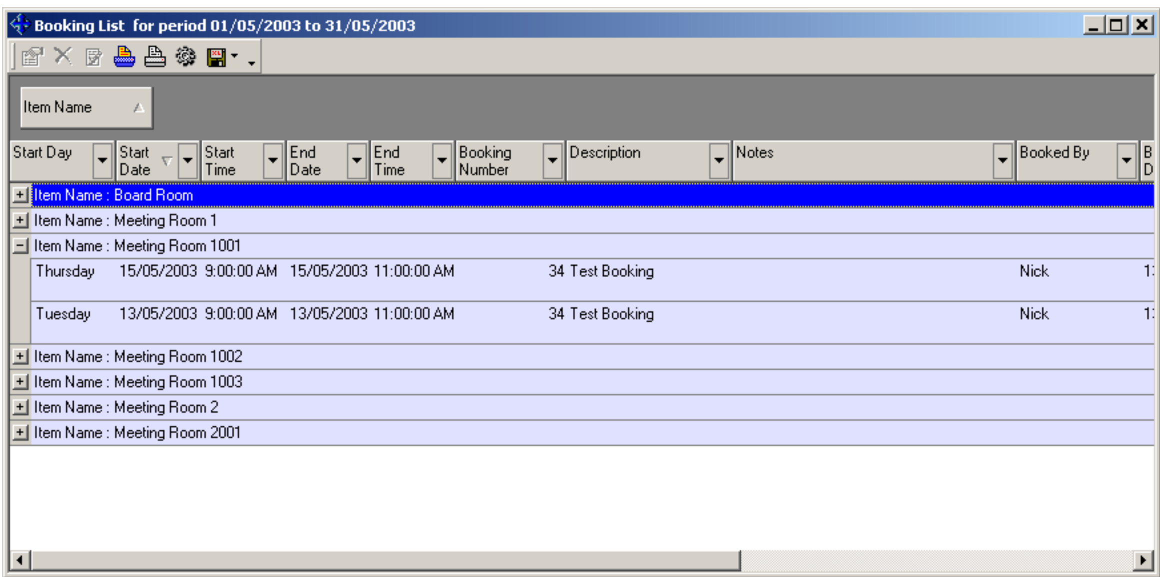
9.2 Booking List

Once you have completed the booking search form you will get a form listing all the booking that match the parameters you have entered. You can further analyse these bookings into groups, choose which columns you wish to see and then print the list or export it to an Excel file or an HTML file for publishing to a web site.

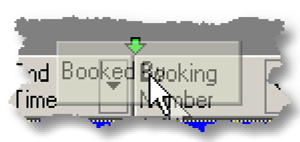


If you wish to resequence the bookings by, for example, the start date click on the column heading of the start date column and the bookings will be sorted in ascending order of start dates and you will see a symbol in the heading; click on the column heading again to sort in descending order and you will see a symbol in the heading. If you wish to order the bookings by start time, in addition to start date, hold down the shift and then click on the column heading of the start time column and you will see a symbol in the heading of this column also.

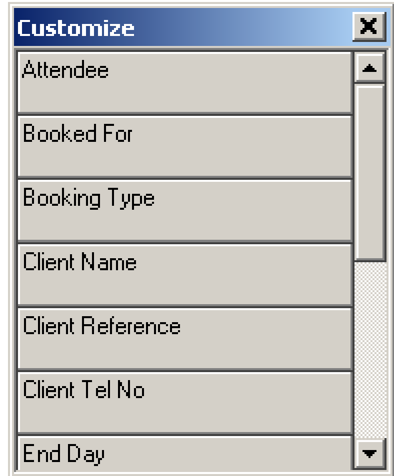
If you wish to group the bookings for each facility, for example, together drag the Item Name column header into the dark grey box above the headings (click on the column heading and keeping the mouse button down move the mouse). The booking list will then produce a list of Facilities; click on the button next to each facility to see a list of bookings in that facility underneath it.



To change the sequence of the columns drag the column heading to the position you want it to be in.



You can also remove columns that you do not require or add columns that are missing by clicking on the customise button to produce a list of available columns. To add a column from this list drag it to the position you require it in the column headings. To remove a column drag the column heading into the column list window.



You can also view, edit or delete a booking from here by clicking on that booking and then clicking on the **View Booking**, **Delete Booking** or **Edit Booking** button.

If you wish to print the list you have 2 options: the **Print** button will print the list in colour with each line having a background in the colour of the booking type of that booking; the **B&W Print** button will print the list strictly in black and white.

To export the list to a file click on the **Export** button and then select the type of file you wish to save, then you will be asked the name of the file and where you wish to save it.

9.3 Facility/Resource/Service Booking List

An alternative way of quickly viewing the bookings for a particular Facility, Resource or Service, is to click on the selected item in the main form and then click on the **View Bookings** button. This will bring up the Booking Search window already selected with the item you have chosen; you can narrow down the search further if you wish then just click on the OK button to produce the list.

9.4 Client Booking List

Similar to the lists mentioned in c. above you can view a list of bookings for a particular client by selecting the client in the Clients window (select **Clients** from the **Tools** window in the main screen) and then clicking on  **Client Bookings** button. This will bring up the Booking Search window already selected with the client you have chosen; you can narrow down the search further if you wish then just click on the OK button to produce the list.

9.5 User Booking List

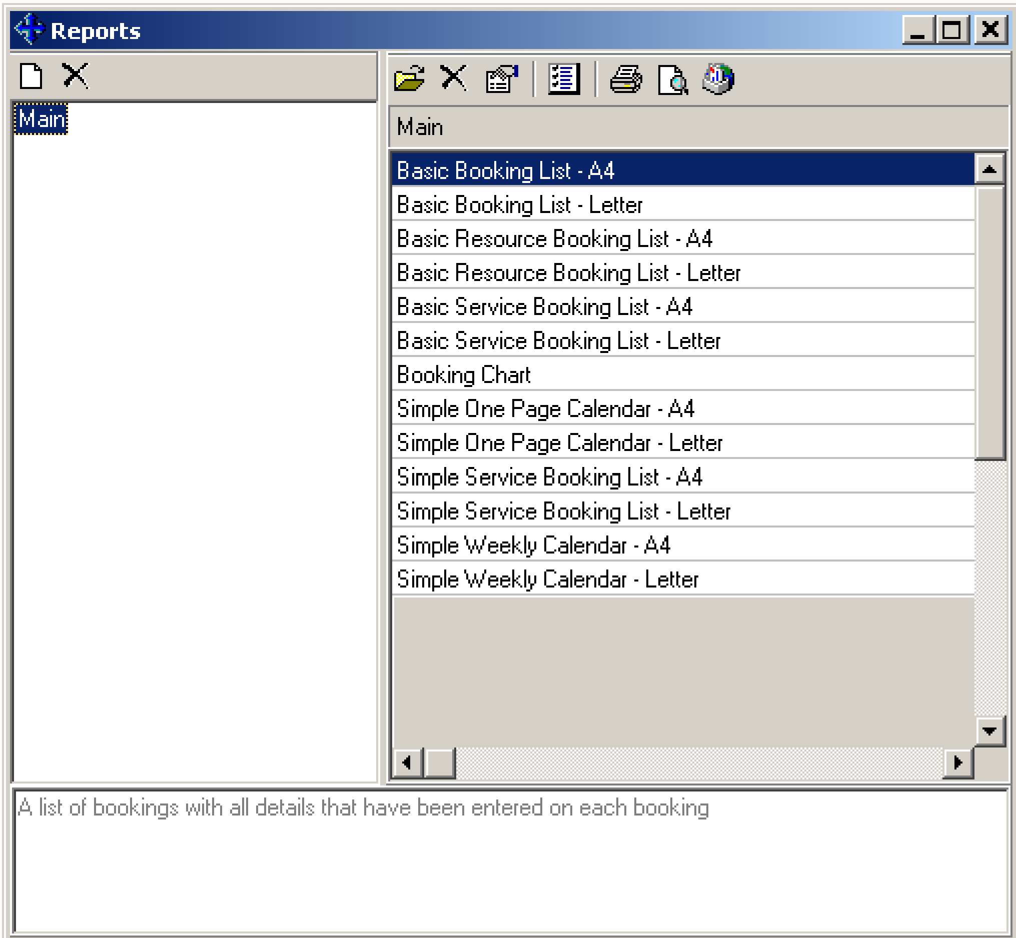
Again to the lists mentioned in c. and d. above you can view a list of bookings made by or on behalf of a particular user by selecting the user in the Users window (select **Users** from the **Tools** window in the main screen) and then clicking on  **User Bookings** button. This will bring up the Booking Search window already selected with the user you have chosen; you can narrow down the search further if you wish then just click on the OK button to produce the list.

Chapter 10

Reports

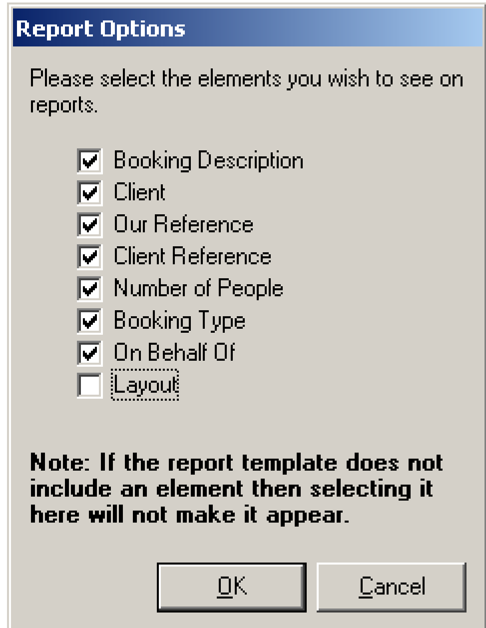
10 Reports

You can print or email reports by select **Reports** from the **Bookings** menu on the main screen. You will then see a list of available reports, possibly in different groups.



First click on the group in the left hand panel of the Reports window, then click on the report you wish to print or email in the right hand panel, then click on the  **Print Report**,  **Preview Report** or  **Email Report** button.

With list and calendar reports you can choose whether to include or exclude some information from the reports by clicking on the **Report Options** buttons. This will bring up a list of available report elements; simply tick the boxes next to those you require and untick those you do not require and then click OK. Now reports will not include any elements that did not have ticks.



Occasionally new or updated report layouts are available on the Crucial Software web site. You can create a new group of reports (or Report Folder) by clicking on the **New Folder** button. You can then load a report template by clicking on the **Load Template From File** button and then selecting the report template file (with an LRP extension). If you have an updated report template then you should either delete the old template (by clicking on the **Delete Report** button), rename it or move the template to a group named something like Backup (you can move a template to another group by dragging the report name from the panel on the right over the group name in the panel on the left).

Chapter 11

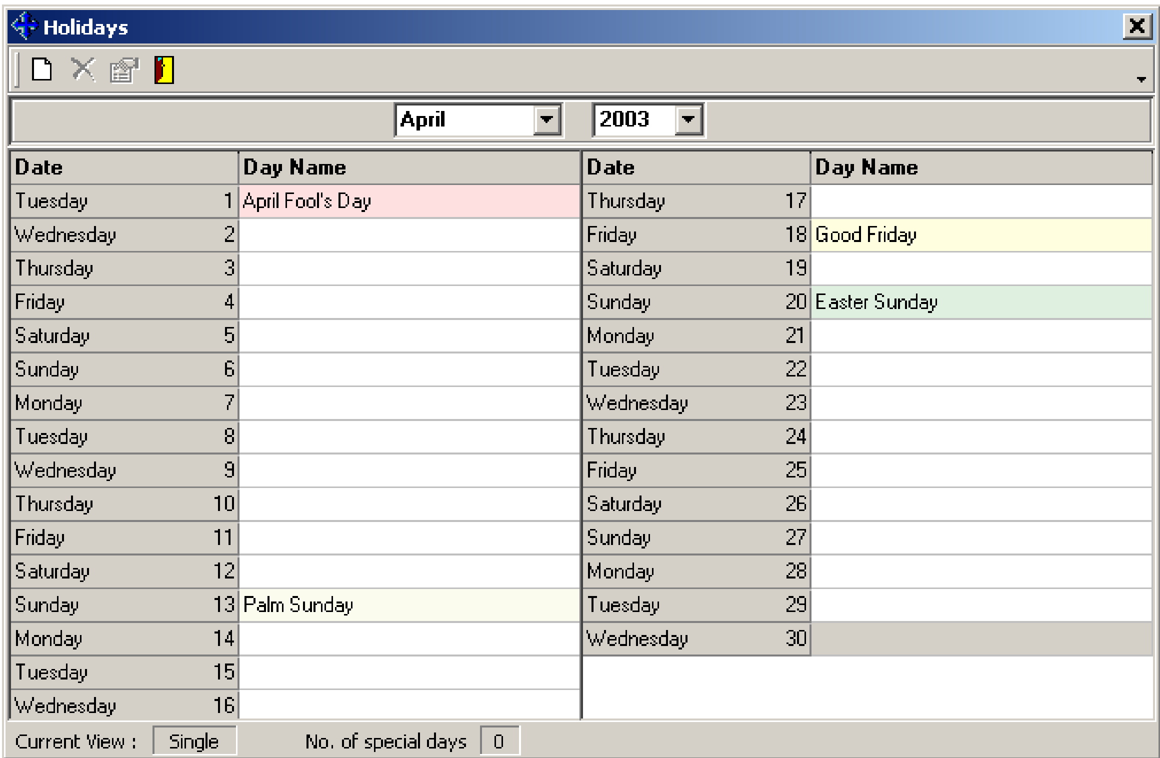
Holidays

11 Holidays

Holidays can be used for two purposes in Libris: the first is to just name and highlight particular days on the booking chart, and the reports; the second is to prevent people from making bookings on selected dates, such as public holidays (where applicable).

To display the Holidays screen, go to the menu bar at the top left-hand corner of the main booking chart. Click on Tools. A drop down menu will appear. Click on the Holidays option.

Note:	You must have administrator rights to be able to access this section of the Libris system.



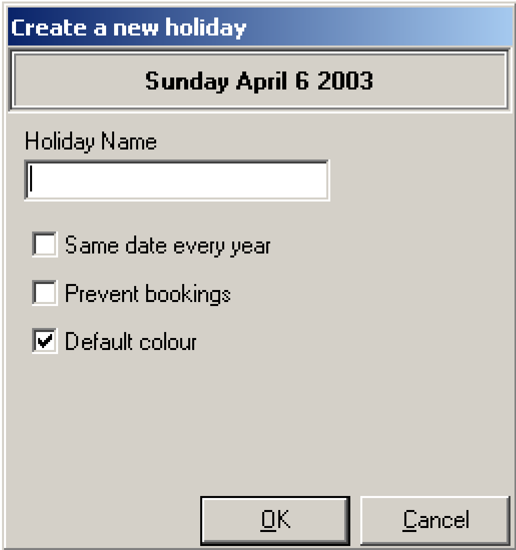
To create a new Holiday:

a. Select the appropriate date in the Holidays window.

b. Click on the Add a new Holiday button in the the menu bar on the Holidays window.

c. The "Create A New Holiday" window will appear.

Alternatively just double click on the date in the list.



Confirm the date of the Holiday is correct.

a. Enter the Name of the Holiday or Event.

b. If this Holiday or Event occurs every year on the same date, check the box entitled "Same date every year".

c. If you want to stop people from booking on this Holiday or Event check the box entitled "Prevent Booking"

d. To apply a special color coding to this day make sure the "Default Color" box is not checked. Then select a fitting color for your Holiday or Event. This color will show on that date in the booking chart on the main screen.

When complete, click OK

Chapter 12

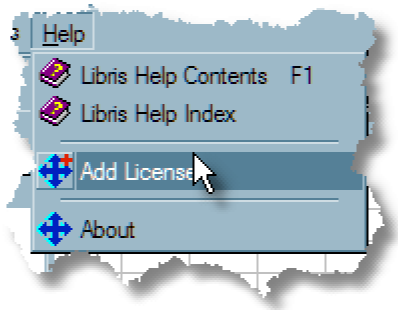
Billing Module

12 Billing Module

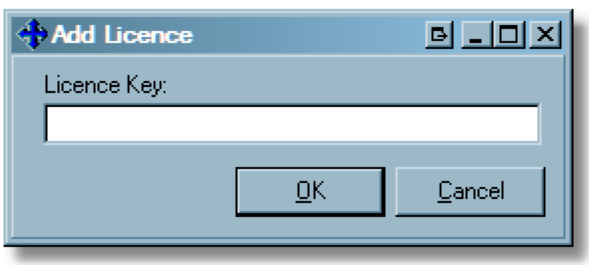
The billing module provides the ability to generate simple invoices. One invoice will relate to one booking, i.e. you cannot have an invoice for just one part of a booking, nor can you have one invoice combining a number of bookings.

12.1 Installing the Billing Module

There is no need to install the billing module, it is included within the standard Libris package, all you need to do is switch it on. To do this you will need to get a Licence Key from Crucial Software. Once you have a licence key all you need to do is enter it into Libris.

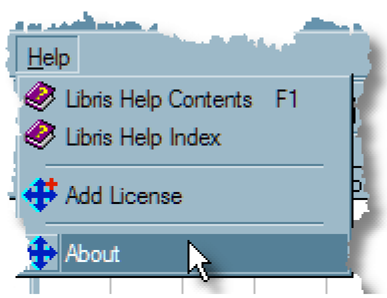


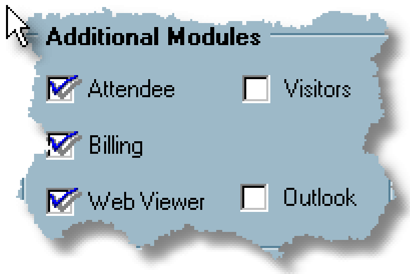
Select "Add Licence" from the Help menu and then type in the licence key.



Click OK. Then close Libris and restart it you should now have the billing module enabled.

To check this out go to the Help menu and select About. The Billing module should now be shown as ticked, see example below.

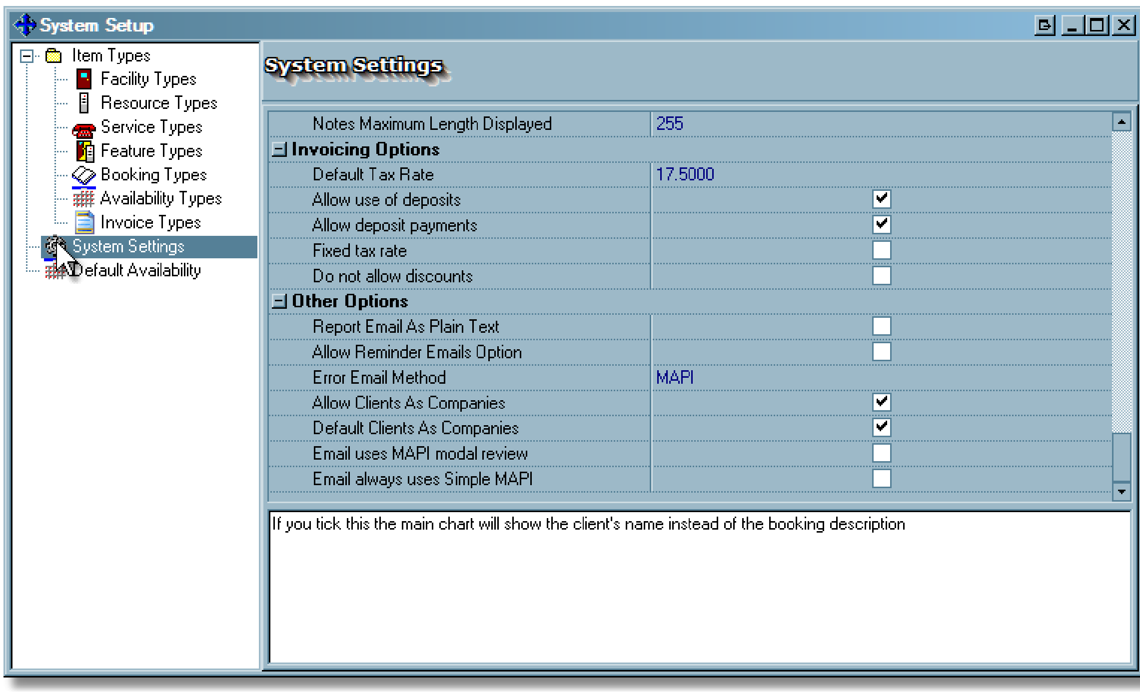




12.2 Setting up Billing Module

Before you can generate invoices, there are three things you need to set up:

1. First you need to set up the Invoicing Options. Select System Setup from the Tools, then click on System Settings in the list on the left.



Options in here will include: a default tax (or VAT) rate, allowing discounts, adjustable tax rates, and allowing deposits. More may be added later, check the System Setup screen for the latest options.

2. You will need to set up one or more Invoice Types.

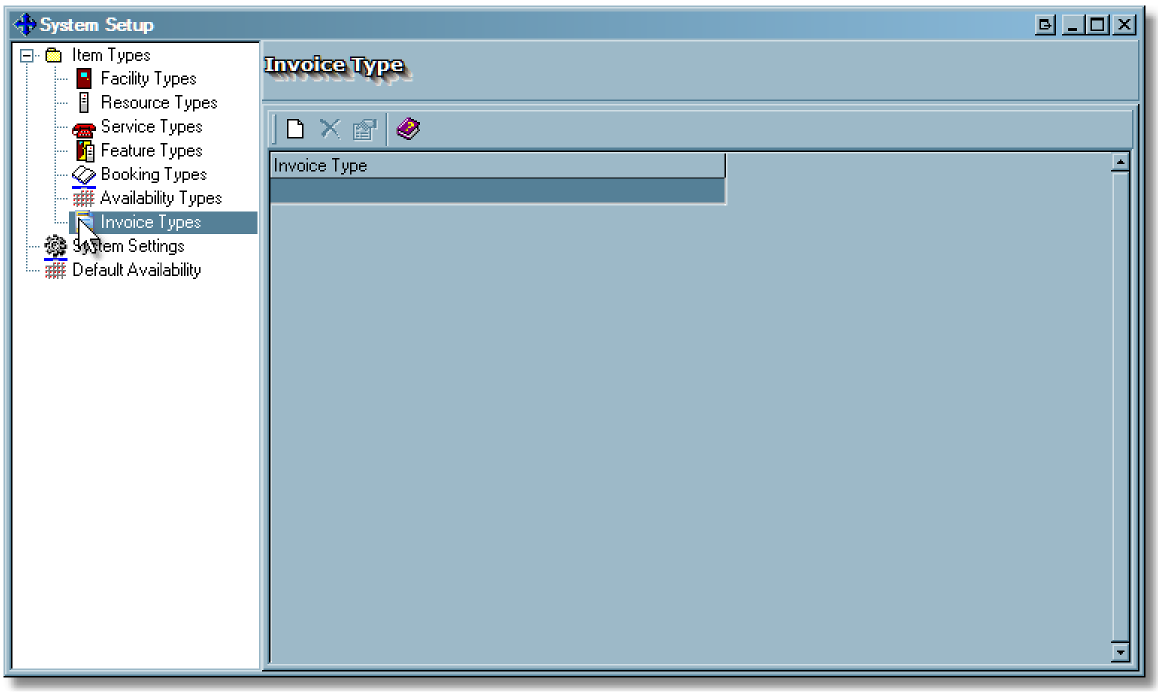
3. The you will need to set up the pricing options and all facilities, resources and services that you wish to bill for.

12.3 Invoice Types

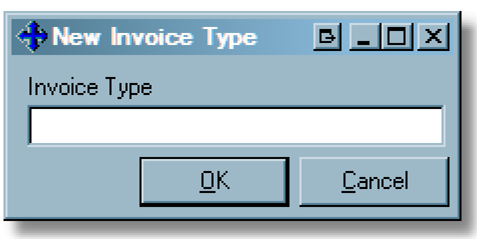
Before you can use the billing module, you need to determine what invoice types you wish to use. You must have a least one invoice to generate an invoice.

Invoice Types can be used to represent many things. You may wish to use them just for reporting and enquiry purposes, or else they can be used to have different pricing options (see Facility Pricing Setup, Resource Pricing Setup and/or Service Pricing Setup for more information).

To set up invoice types, select System Setup from the Tools menu, and then click on Invoice Types in the list on the left.



To create a new invoice type, click on the "New Invoice Type" button.



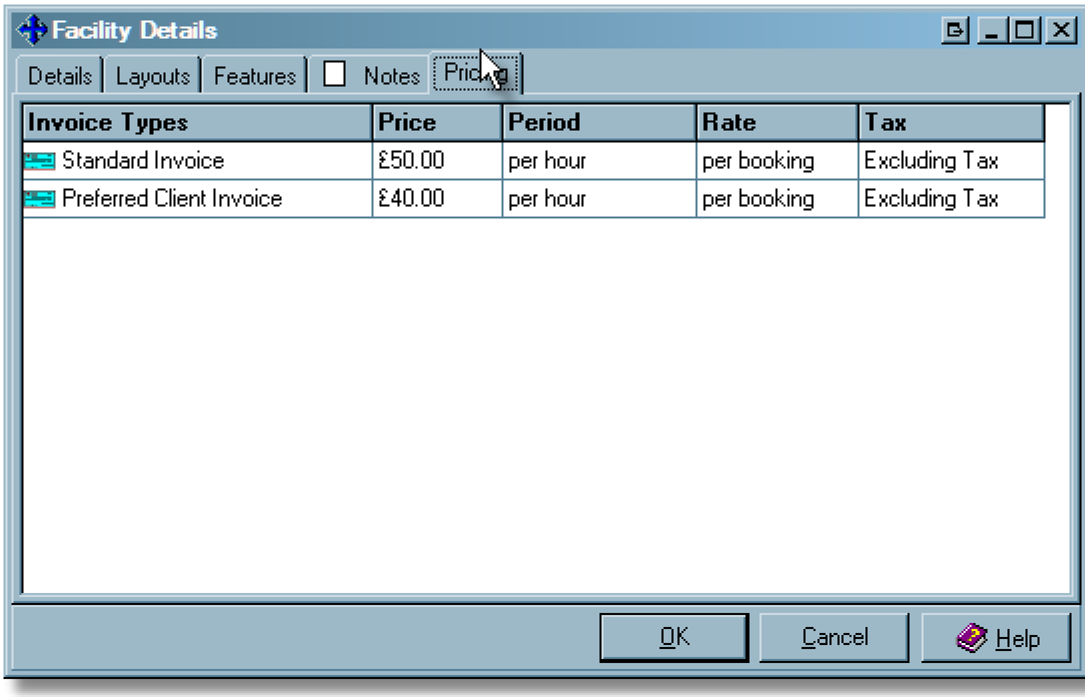
Type in the name for the Invoice Type and click OK.

Add as many invoice types as you think you will need and then close System Setup.

12.4 Facility Pricing Setup

If you charge for the use of each facility you will need to set up the prices and how those prices are used to calculate the amount on each bill.

In the main Libris screen, right click on the facility you wish to setup and select Edit Item, then click on the Pricing tab at the top.



In the pricing page you will find a line for each invoice type you have set up, this way you can have different pricing for different circumstances.

You have four settings you have to select.

1) Price. Here you enter the price that will be charge multiplied depending on the Period and Rate settings.

2) Period. You have a choice of "per booking", "per day" and "per hour". These work as follows:
   a) Per booking. The price you have entered in the "Price" will be charged no matter how long the booking lasts.
   b) Per day. The price you entered in the "Price" column will be multiplied by the number of days the booking lasts for, no matter how long the booking lasts on each day.
   c) Per hour. The price you entered will be multiplied by the number of hours the booking lasts for. So, for example, if a booking lasts for 3 hours on each day for four days, the price will be multiplied by 12.

3) Rate. You have two choices: "per booking" and "per person". If your rate depends on the number of people in the room the select "per person" and the price you entered in the "Price" column will be multiplied by the number of people selected on the booking form.

4) Tax. You have three options:
   a) Exempt. This means no tax (or VAT) will be charged for this facility.
   b) Excluding Tax. This means that tax (or VAT) will be added to the price entered here using the rate set up in the System Settings.
   c) Including Tax. This means that tax (or VAT) is included in the price entered here.

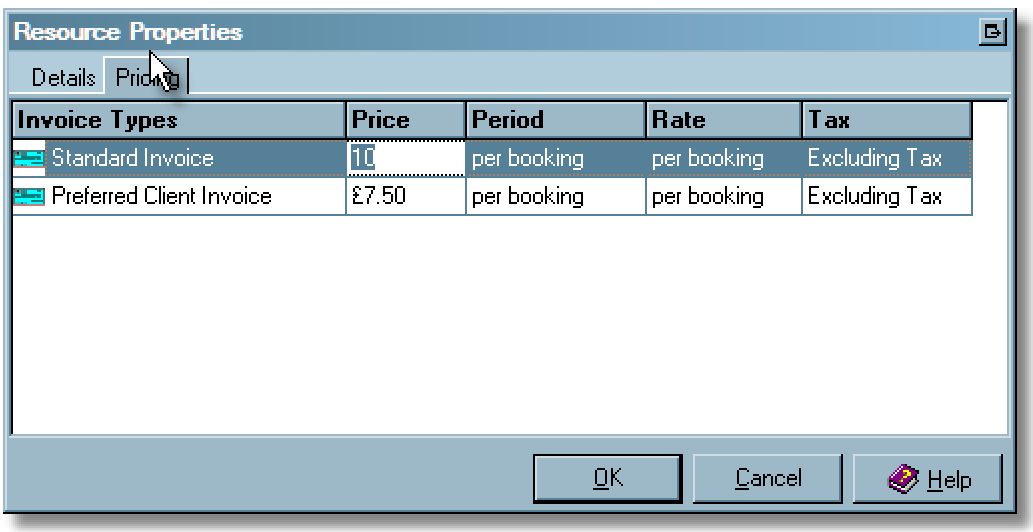
You must enter a value in the "Price" column to ensure that this facility will be included when you generate the invoice.

Note: The price can be overridden on the invoice form, but the Period, Rate and Tax settings cannot.

12.5 Resource Pricing Setup

If you charge for the use of each resource you will need to set up the prices and how those prices are used to calculate the amount on each bill.

In the main Libris screen, right click on the resource you wish to setup and select Edit Item, then click on the Pricing tab at the top.



In the pricing page you will find a line for each invoice type you have set up, this way you can have different pricing for different circumstances.

You have four settings you have to select.

1) Price. Here you enter the price that will be charge multiplied depending on the Period and Rate settings.

2) Period. You have a choice of "per booking", "per day" and "per hour". These work as follows:
   a) Per booking. The price you have entered in the "Price" will be charged no matter how long the booking lasts.
   b) Per day. The price you entered in the "Price" column will be multiplied by the number of days

the booking lasts for, no matter how long the booking lasts on each day.

c) Per hour. The price you entered will be multiplied by the number of hours the booking lasts for. So, for example, if a booking lasts for 3 hours on each day for four days, the price will be multiplied by 12.

3) Rate. You have two choices: "per booking" and "per person". If your rate depends on the number of people in the room the select "per person" and the price you entered in the "Price" column will be multiplied by the number of people selected on the booking form.

4) Tax. You have three options:
a) Exempt. This means no tax (or VAT) will be charged for this facility.
b) Excluding Tax. This means that tax (or VAT) will be added to the price entered here using the rate set up in the System Settings.
c) Including Tax. This means that tax (or VAT) is included in the price entered here.

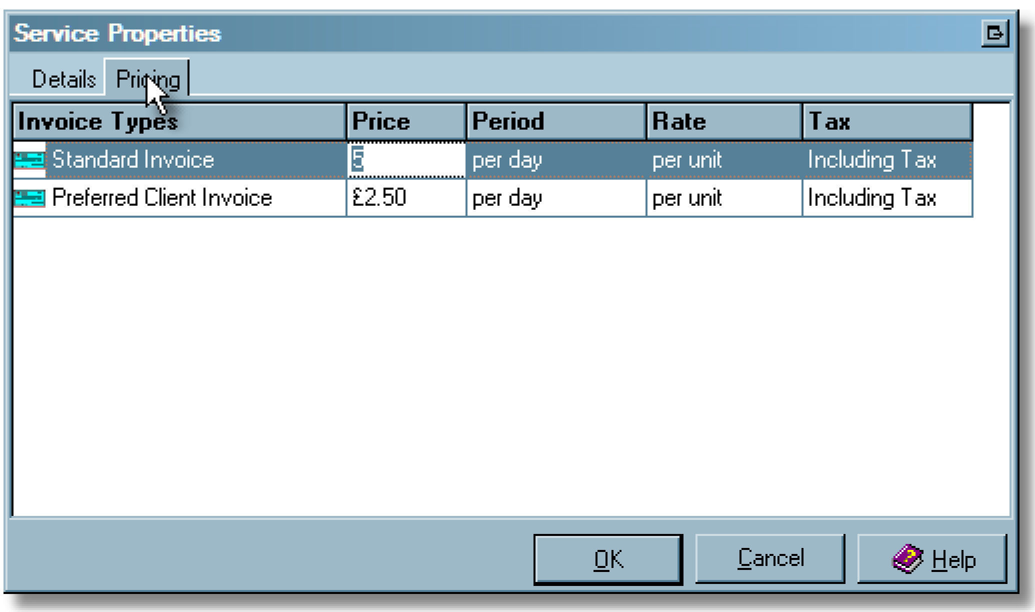
You must enter a value in the "Price" column to ensure that this resource will be included when you generate the invoice.

Note: The price can be overridden on the invoice form, but the Period, Rate and Tax settings cannot.

12.6 Service Pricing Setup

If you charge for the use of each service you will need to set up the prices and how those prices are used to calculate the amount on each bill.

In the main Libris screen, right click on the service you wish to setup and select Edit Item, then click on the Pricing tab at the top.



In the pricing page you will find a line for each invoice type you have set up, this way you can have different pricing for different circumstances.

You have four settings you have to select.

1) Price. Here you enter the price that will be charge multiplied depending on the Period and Rate settings.

2) Period. You have a choice of "per booking", "per day" and "per hour". These work as follows:
   a) Per booking. The price you have entered in the "Price" will be charged no matter how long the booking lasts.
   b) Per day. The price you entered in the "Price" column will be multiplied by the number of days the booking lasts for, no matter how long the booking lasts on each day.
   c) Per hour. The price you entered will be multiplied by the number of hours the booking lasts for. So, for example, if a booking lasts for 3 hours on each day for four days, the price will be multiplied by 12.

3) Rate. You have three choices:
   a) Per unit. This is the usual option for a service when you have selected the "Ask for no required" option when setting up the service. This means that the price relates to each unit of the service supplied. For example, if your service is "Coffee" and you charge for each pot of coffee then you would select this option and put in the price per pot.
   b) Per person. If your rate depends on the number of people booked in the room the select "per person" and the price you entered in the "Price" column will be multiplied by the number of people selected on the booking form.
   c) Per booking. Select this if you do not charge depending on the number of people or the number of the service you have booked.

4) Tax. You have three options:
   a) Exempt. This means no tax (or VAT) will be charged for this facility.
   b) Excluding Tax. This means that tax (or VAT) will be added to the price entered here using the rate set up in the System Settings.
   c) Including Tax. This means that tax (or VAT) is included in the price entered here.

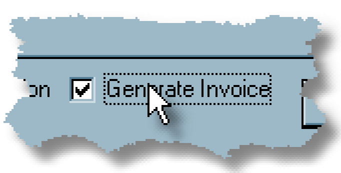
You must enter a value in the "Price" column to ensure that this service will be included when you generate the invoice.

Note: The price can be overridden on the invoice form, but the Period, Rate and Tax settings cannot.

12.7 Generating an Invoice

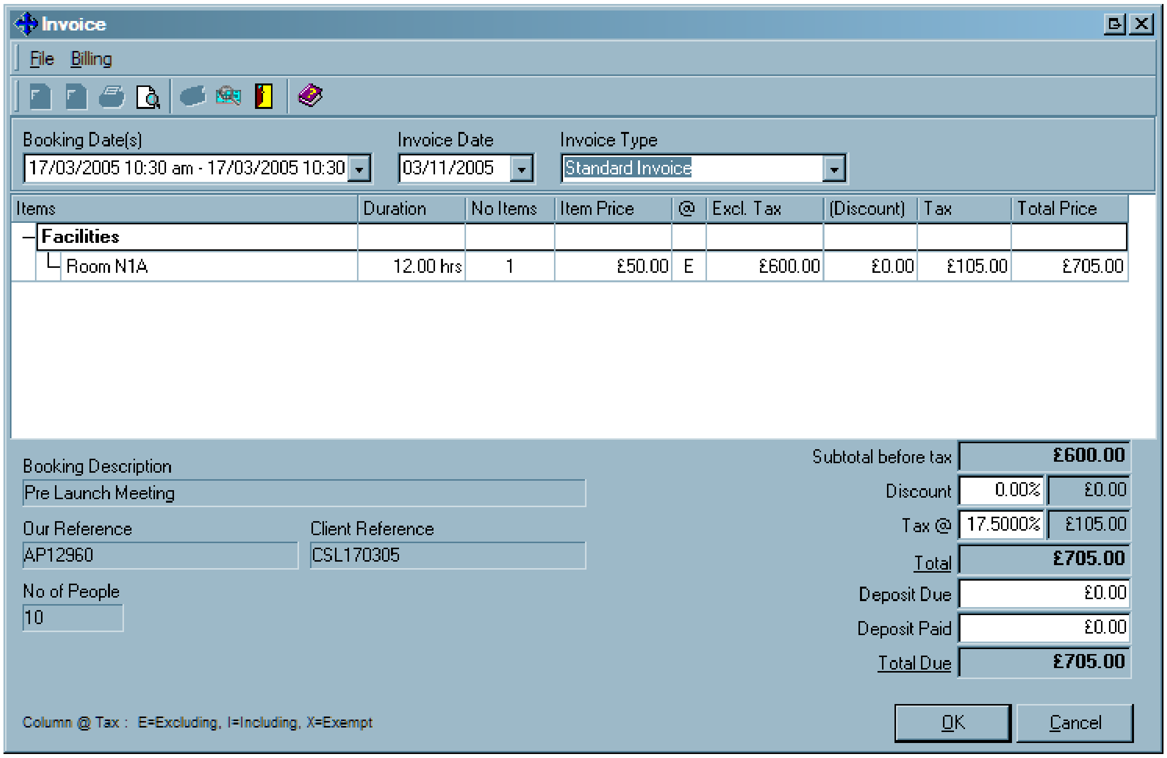
There are two ways to generate an invoice.

First when entering or editing a booking you will see a tick box at the bottom of the screen:



tick this and an invoice will be generated when you click the Save or Finish button.

Or if you want to generate and invoice for a booking that has already been created, view the booking from the booking chart or using the [Booking Search], then click on the View Invoice option. You will see the invoice, but it will show that "No Invoice has been generated", so you will need to click on the Generate Invoice button.



When the invoice screen comes up you can now adjust the invoice. The first thing to do is select the invoice type and the invoice date. Once you have done this, you can adjust the Item Price of each item (Facility, Resource or Service) on the invoice. You can also add a discount, adjust the Tax (or VAT) rate and put in a deposit (depending on your System Settings). Once you have finished, click on the OK button.

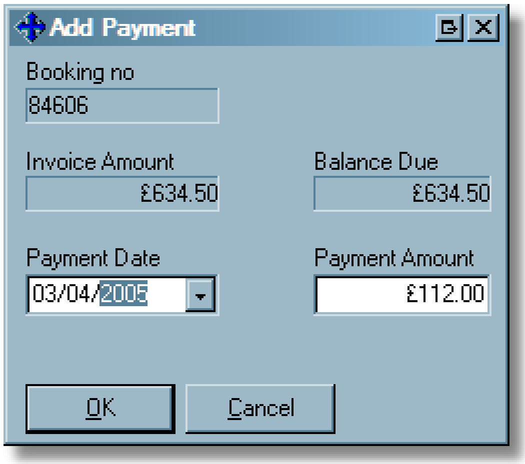
You should now see the Invoice View screen. From here you can print the invoice, view payments and add payments.

12.8 Editing an Invoice

To edit an invoice, view the booking from the booking chart or using the Booking Search, then click on the View Invoice option. You will see the invoice details, now click on the Edit Invoice button. The process is now the same as Generating an Invoice.

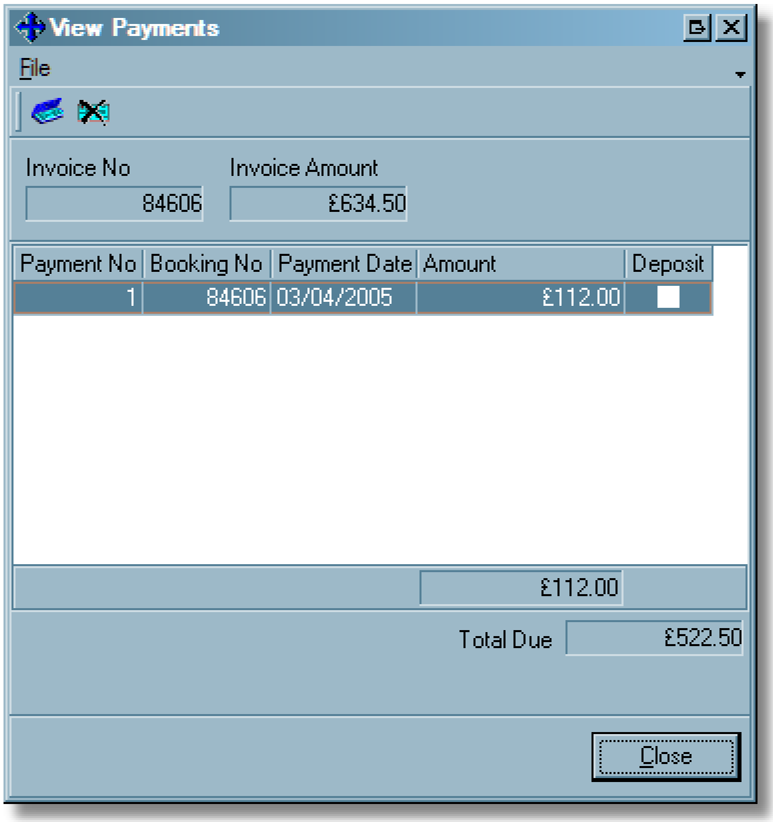
12.9 Entering Payments

You can enter payments directly from viewing the booking or viewing the invoice by clicking the Make Payment button.

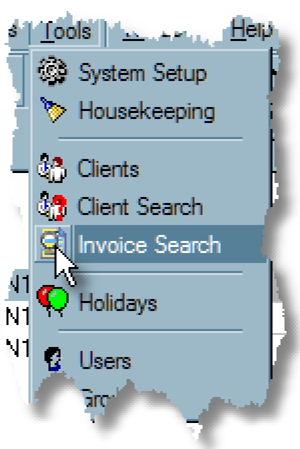


Enter the date of payment and the amount received and click on OK.

Or else you can view the payments relating to a booking/invoice by clicking on the View Payment button, and from here you can also make a payment using the Make Payment button.

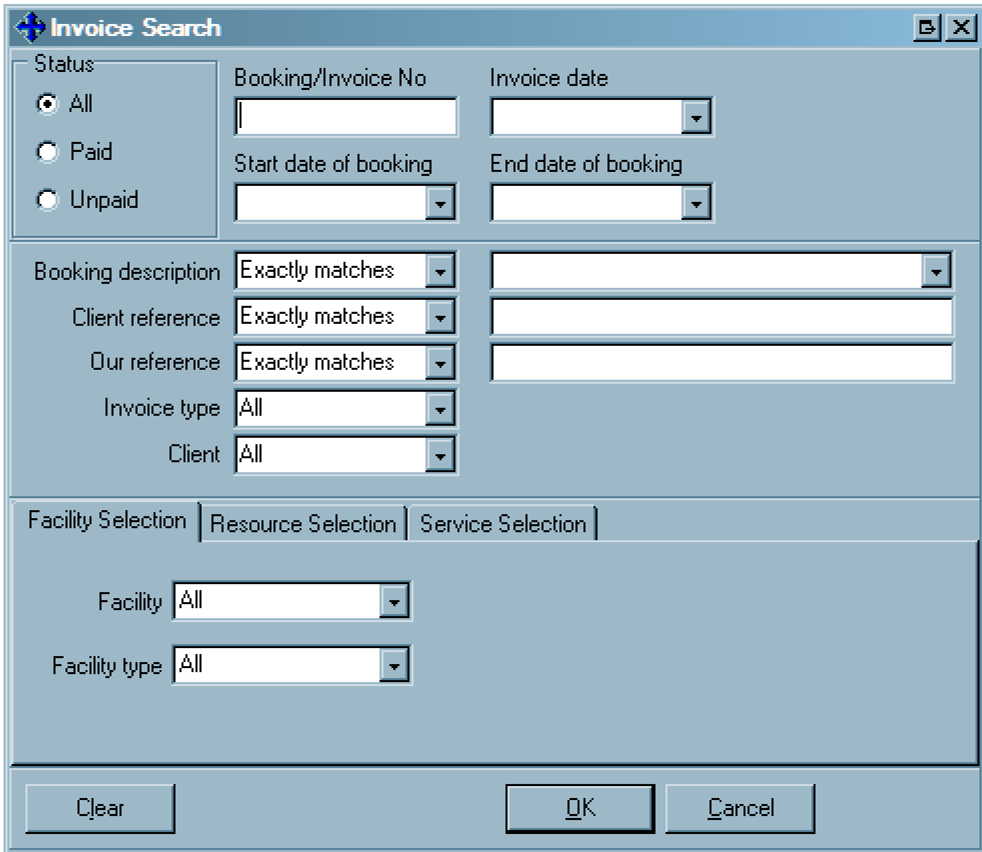


12.10 Searching for Invoices

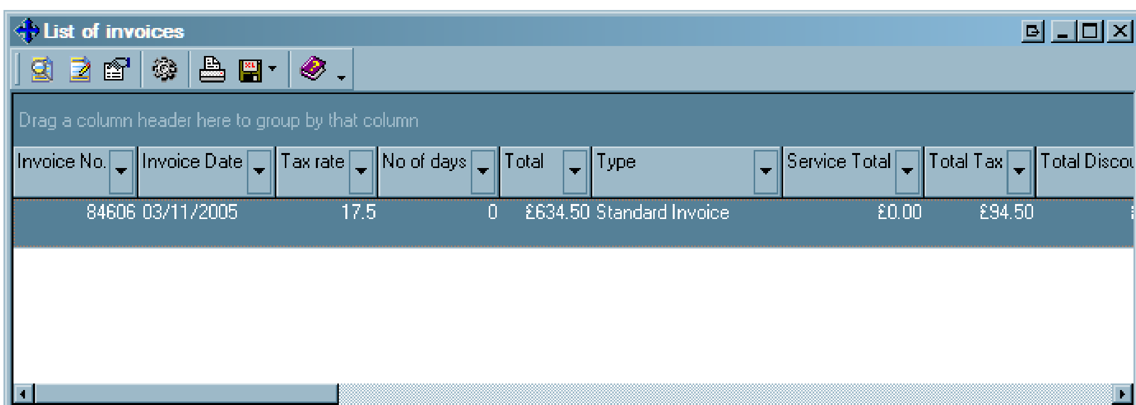


To search for an invoice or to produce simple billing reports, select Invoice Search from the Tools menu on the main Libris screen.

You can now enter a number of parameters to find the invoices you are looking for:



Once you have entered the criteria you wish to use to search, click on OK and you will then get a list of all invoices that match your criteria.



From here you can view or edit the invoice or booking by clicking on the buttons in the toolbar. You can also adjust the columns, print the list or export it to Excel. These options are the same as with the Booking List, see that section for more details.

12.11 Billing Reports

To be completed.

Chapter 13

Web Viewer

13 Web Viewer

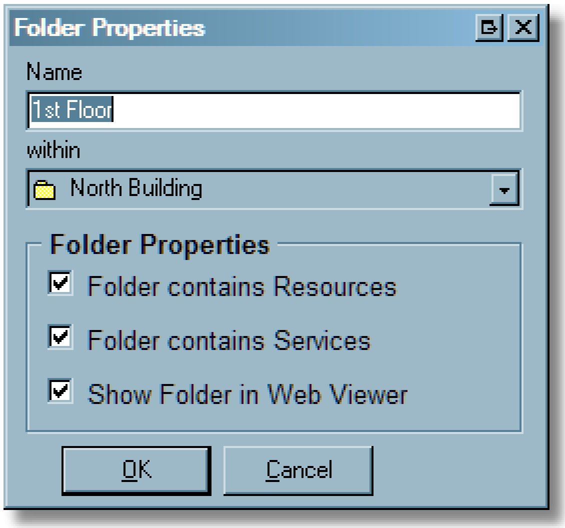
If you have purchased the Web Viewer this gives an unlimited number of users simple read access to the Libris Schedule. The Web Viewer shows bookings that are of booking types that are published on Facilities that are published.

13.1 Setting Up Web Viewer

Once you have installed the Web Viewer, see Chapter 2., you need to set up which folders, facilities and booking types are published on the Web Viewer. Everything defaults to NOT being published, so if you try to use the Web Viewer before performing this step you will see no facilities or bookings.

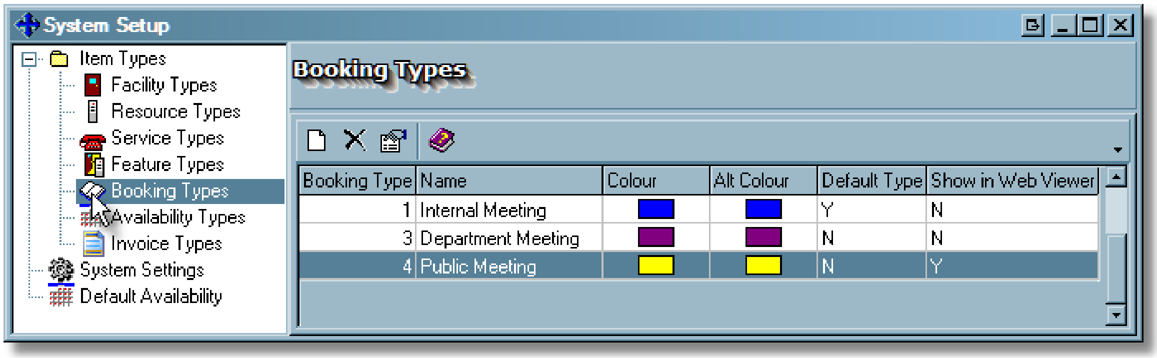
Note: You will need to make sure you have installed the Web Viewer licence key. You can check this by looking on the About screen - select About from the Help menu (in the Windows Libris client) and check which modules are installed.

To set up a folder on the Web Viewer, in the Windows Libris client, right click on a folder you wish to publish, select Edit item and the tick the "Show Folder in Web Viewer" box.



To set up a facility on the Web Viewer, first make sure all folders that it is contained in are published by following the procedure above, then right click on the facility on the main Libris screen and select Edit Item, then tick the "Show this facility in the Web Viewer" option.

To allow you to make some booking invisible to the Web Viewer you can select which booking types are published on the Web Viewer. Select the System Setup option from the Tools menu and click on the Booking Types option on the left.



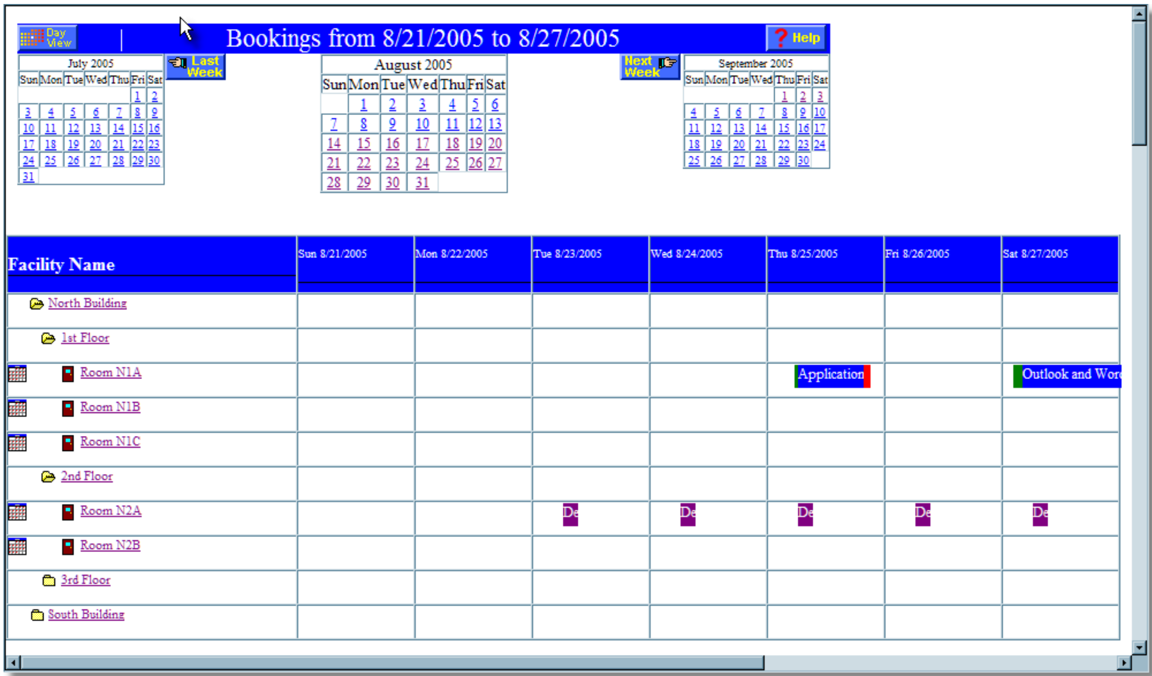
Select the booking type you wish to publish and the click on the Edit/View Properties button. Then tick the "Show bookings of this type in the Web Viewer" box.

13.2 Using the Web Viewer

To use the Web Viewer, open up your web browser (Microsoft Internet Explorer 5.0 or later, or Mozilla Firefox) and enter the address of the server where the Web Viewer has been installed.

You will be asked to select whether you want a day view or week view.

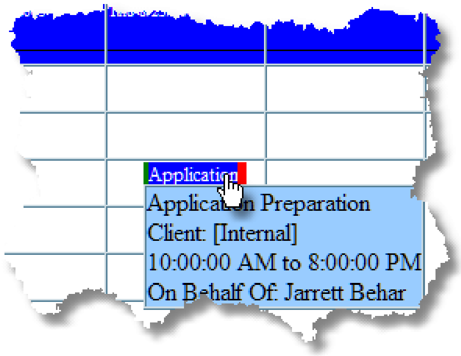
You will then see a list of all the facilities with a chart showing all the booking for the current day or week.



You can changes the date viewed by using the calendars at the top of the screen, or the Next Week and Last Week buttons.

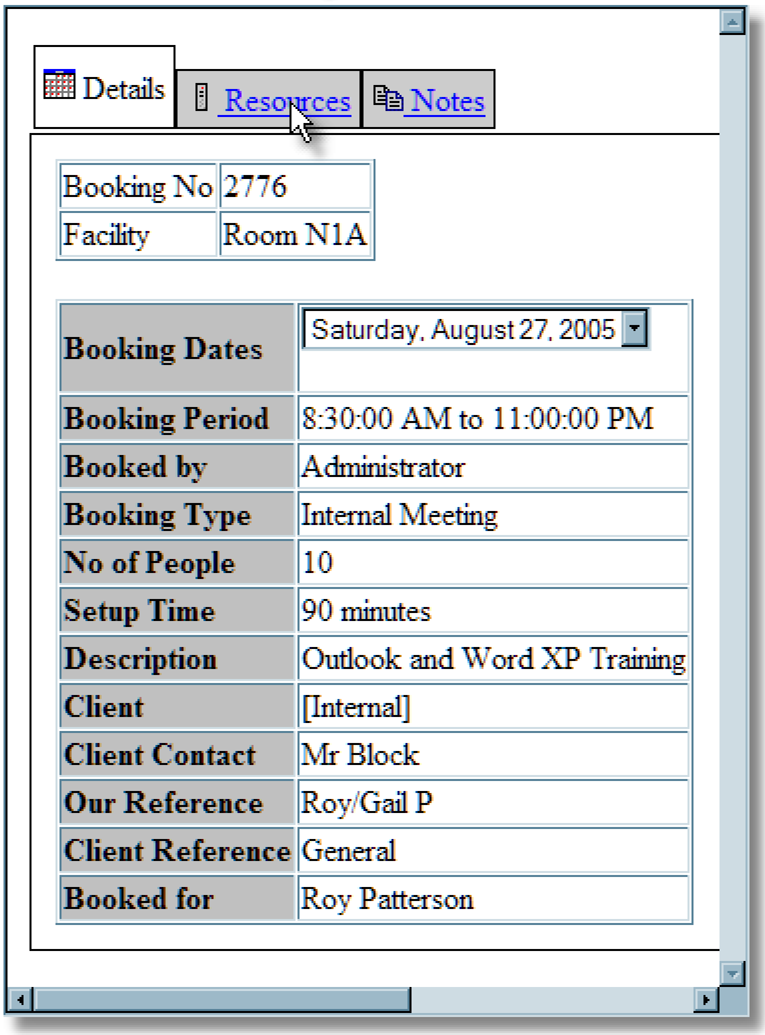
You can open and close folders by clicking on them.

To see details about the facility, click on the facility name, or to see a list of bookings for that facility click on the View Bookings button.



To view brief details of a booking, just hold the mouse cursor over the booking on the chart.

You can see further details by clicking on the booking.



You can see other details of the booking by clicking on the tabs across the top of the screen (Resources, Services, Attendees and Notes).

Chapter 14

Access Security

14 Access Security

The list of users is made up of those people that are going to use Libris to make or view bookings, or those people within your organisation who will have bookings made on their behalf ("users" do not necessarily have to use Libris). There are 4 security levels for users, each having different levels of access to functions within the system:

Administrator: Administrators can access every function in the system, including changing system settings, create and change facilities, resources, services, users, etc.

Booking Manager: Booking Managers can edit and/or delete any booking in the system including historic bookings.

Standard: Standard users' access is determined by the User Group they belong to. By default they can make bookings and edit those bookings before they have started.

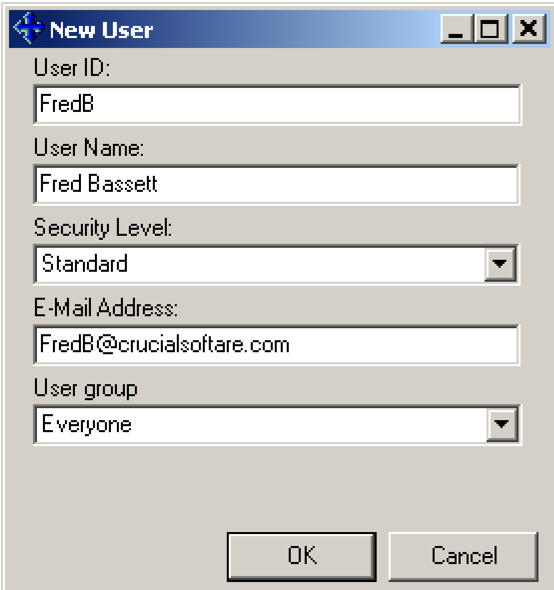
Enquiry Only: These users can only search for and look at bookings and run reports

14.1 User Groups

You can set up a number of user groups that have different levels of access to different folders and facilities. For example, if you have 2 folders representing 2 different offices you may wish to have a User Group for each folder giving standard access to the folder it relates to and enquiry only access to the other.

14.2 New Users

To add a new user to the system select **Users** from the **Tools** menu and then click on the **New User** button to bring up the New User window.



User ID The identity that the user will use to access Libris (or their Windows user identity if you have chosen the system setting for Libris to use Windows identity automatically). If this user will never use Libris just put anything in here.

User Name The name of this user to be displayed on booking forms, confirmations, enquiries and reports.

Security Level See above

Email Address The email address of this user to be used for email confirmations if they are involved in a booking in some way. This field is optional.

User Group If the Security Level is Standard then you will need to select a User Group (see above for more details).

Index

- A -

- B -

- C -

- D -

- E -

- F -

- H -

- I -

- L -

- M -

- N -

- O -

- P -

- R -

- S -

- T -

- U -

- W -