

Using BookingPOINT

About BookingPOINT

BookingPOINT is a powerful room and equipment booking system allowing you to take full control of the booking and borrowing process while making sure everything runs smoothly within your organization.

Customization

Being a FileMaker based database system; BookingPOINT can be modified and customized to suit your needs.

You may decide to purchase an open license that will allow you internal access to modify any aspect of the system. Please ensure that you or some else is familiar with FileMaker before making any changes.

Alternatively, since we are a FileMaker development company, you may decide to hire us to make the changes you need – thus ensuring that the changes are done correctly and in an efficient manner since we know BookingPOINT best.

Web Bookings

With BookingPOINT Deluxe and FileMaker Server Advanced, your borrowers can book equipment on-line via a modern web browser.

Please visit the FileMaker website for current FileMaker Server Advanced pricing.

Self-Service Stations

If you want to provide up to 5 self-service stations (i.e. outside the loan desk, library etc), you can with BookingPOINT Deluxe. The self-service stations access the same web interface via a web browser as normal web users would. The only difference is you don't need FileMaker Server Advanced to host BookingPOINT.

Scheduler

With BookingPOINT Deluxe and FileMaker Server or FileMaker Server Advanced, certain tasks can be scheduled to run automatically at certain times such as issuing demerit points, sending automated reminder emails, suspending overdue borrowers etc.

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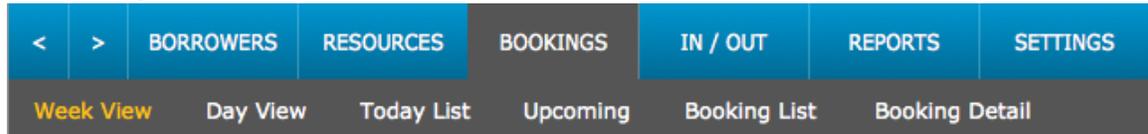
The Basics

Main menu



You can navigate through the different pages using the main menu as shown above. In the example above the user is in the **Borrowers** section. To navigate to another section, just click on one of the other menus.

Secondary tabs



Most pages have a secondary layer of tabs (as shown above). To navigate to the secondary tabs just click on the sub-tab that you want to go to. In the above example, the user is in the **Bookings** section viewing the **Week View** page.

Back / forward navigation



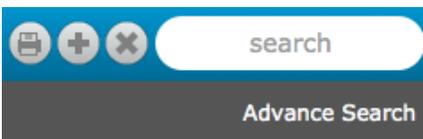
You can navigate back and forth between pages you've already visited, just like a web browser.

Quick search



Use the quick search field on the top right hand corner of most pages to search for records.

Advanced Search



Use the 'Advanced search' button field on the top right hand corner of most pages to perform more advanced searches on specific fields.

Main buttons



The main buttons allow you to **Print** the page, **Add** a new record or **Delete** the record you're viewing.

NOTE: while you're on a list page the Delete button will be disabled – to delete via a list page, use the X button on the right hand side of the record line you want to delete.

List Pages

You can view Borrowers, Resources and Bookings in list format, which will show you a list of all the records in your current found set. If you perform a search, the list page will display your results as shown below:

<input type="checkbox"/> Group records (when sort by column)						Record: 1 of 282 - Total: 282	
Borrower	Student No	Department	Study	Unit	Status		
Lynsey Evans	3502419	ARTS	ABSA	Video Arts	Active	Hide ✕	
Greg Hollingsworth	5001143	ARTS	ABAC	Animation	Active	Hide ✕	
Robert Kanes	5002151	CLACS	VDUE	Multimedia	Active	Hide ✕	

You can click on a column and it will sort the records by that column. You can click on a record row and you will open the record and go to the detail page.

On the right hand side of the page there's a **Hide** button, which will hide the record from your found set.

You can also delete a record from the list page by clicking the **X** button the right hand side of the record row. You will be asked if you want to delete the record first.

On the top left of the list page you will see a **Group Records** checkbox. This checkbox will group the records based on the column you're sorting on. The following page shows the borrower data grouped by **Unit**.

<input checked="" type="checkbox"/> Group records (when sort by column)						Record: 1 of 282 - Total: 282	
Borrower	Student No	Department	Study	Unit	Status		
Unit: Animation							
Greg Hollingsworth	5001143	ARTS	ABAC	Animation	Active	Hide ✕	
Katherine Corcoran	3623506	ARTS	BBBS	Animation	Active	Hide ✕	
Andrew Ruzicic	3599587	CLACS	ABAC	Animation	Active	Hide ✕	
Luke Pales	3587900	ARTS	ABXM	Animation	Active	Hide ✕	
Unit: Documentary							
Lisa Jones	3567116	ARTS	ABCM	Documentary	Active	Hide ✕	
Sue Ellen Bugay	3564767	ARTS	ABXM	Documentary	Active	Hide ✕	
Shelly Di Venuto	3589333	ARTS	ABXM	Documentary	Active	Hide ✕	

Note: Not all columns can group results, as some columns contain unique values.

Borrowers

The Borrowers page allows you to track all the borrowers within the system.

The screenshot displays the 'Borrower Detail' page. At the top, there is a navigation bar with tabs for BORROWERS, RESOURCES, BOOKINGS, IN / OUT, REPORTS, and SETTINGS. A search bar is located on the right. Below the navigation bar, there are two tabs: 'Borrower List' and 'Borrower Detail'. The main content area is divided into three columns: 'Contact Details', 'Contact Methods', and 'Demerit Points'. The 'Contact Details' section includes fields for Name (Lynsey Evans), Student No (3502419), Barcode (001001), Department (ARTS), Study (ABSA), and Unit (Video Arts). There are 'Apply to Set' buttons for the Department, Study, and Unit fields. Below these fields are checkboxes for 'Suspended', 'Disabled', 'Expired', and 'Receive SMS Messages'. The 'Contact Methods' section is currently empty. The 'Demerit Points' section has a 'Total' field. At the bottom, there are tabs for 'General', 'Upcoming Bookings', 'Loaned Resources', 'Historical Bookings', and 'Web'. The 'General' tab is active, showing 'Privilege Sets' (Student, Staff) and 'Notes'.

Contact Details – Contains information regarding the borrower. The **Apply to Set** buttons can be used to apply changes to all records within your current found set.

Contact Methods – This area is where you specify phone numbers, email addresses etc. Click on the first blank line to enter details.

Demerit Points – Demerit points are issued automatically (Deluxe) and displayed in this area. You can delete demerit points or manually add points if you need to.

Suspended **Disabled** **Expired** **Receive SMS Messages**

Suspended – Once a borrower reaches a certain number of demerit points, their account will be automatically suspended (Deluxe only). You can manually suspend or un-suspend a borrower via the checkbox.

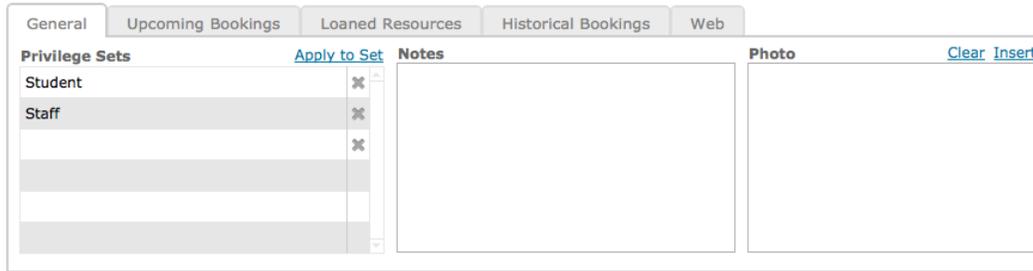
Disabled – You can disable a borrower via this checkbox and they will not be able to log in via the web portal.

Expired – When a borrowers Privilege Set expires (if an expiry date has been set) this checkbox is automatically checked indicating that the account has expired.

Receive SMS Messages – If this checkbox is enabled, then the borrower will receive reminder messages via SMS (if the SMS feature is enabled in system settings).

General Tab

The **General** tab allows you to specify multiple borrower privileges, record notes and add a photo of the borrower.



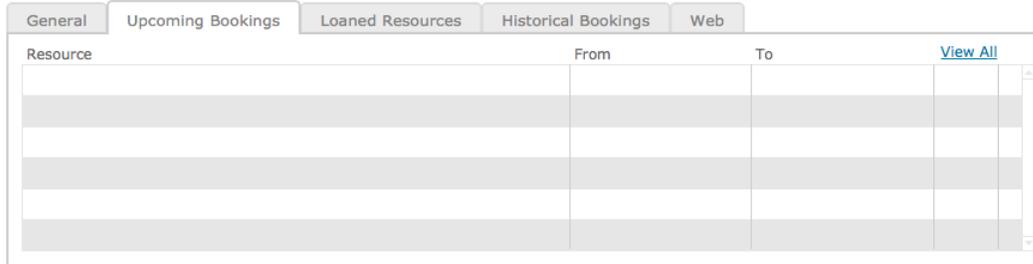
The Privilege Sets section allows you to assign multiple privilege sets to a borrower.

To assign a privilege set, click in the first blank line and you'll see dropdown list of available privilege sets (as defined in Settings).

Use the **Apply to Set** button to apply the same privilege sets to all borrower records in the current found set.

Upcoming Bookings Tab

The Upcoming Bookings tab shows a list of current and future bookings for the borrower.



Loaned Resources Tab

The Loaned Resources tab shows a list of resources that the current borrower has in their possession, and also shows when it's due back or if it's overdue.



Historical Bookings Tab

The Historical Bookings tab shows a list of all past bookings for the borrower.

Resource	From	To	Returned	View All

Web Tab

Web Account Settings (Deluxe Only)

NOTE: When using 'External Authentication', only Login is applicable and not Password.

Login

Password

The Login field shows the login name web users need to use to login in to the web portal. The default is the borrowers student number, but can be changed to different fields or even a custom value via system settings.

The default password for web users is '1234' – as soon as they log on for the first time, they will be asked to enter a new password.

If a user forgets their password, you can use the **Reset Password** button to reset their password back to '1234'.

***NOTE:** If you use Open Directory or Active Directory to manage student passwords, then you can use FileMaker’s built in External Authentication to grant web users access to BookingPOINT using their existing passwords. If you use External Authentication then only the login field will be relevant and the password field and the Rest Password button will have no affect.*

Borrower List

The Borrower List page lets you see a list of Borrowers within your current found set.

***NOTE:** See the section **List Pages** earlier in this document for specific functions of the list page.*

The screenshot shows the Borrower List page with a navigation bar at the top containing tabs for BORROWERS, RESOURCES, BOOKINGS, IN / OUT, REPORTS, and SETTINGS. Below the navigation bar, there are tabs for 'Borrower List' and 'Borrower Detail', and an 'Advance Search' button. A checkbox for 'Group records (when sort by column)' is present, along with a record count: 'Record: 1 of 282 - Total: 282'. The main table has columns for Borrower, Student No, Department, Study, Unit, and Status. Below the table, there are five buttons: Show All, Delete All in Found Set, Import Borrowers, Import Borrower Privileges, and Export Borrowers.

Borrower	Student No	Department	Study	Unit	Status
Greg Hollingsworth	5001143	ARTS	ABAC	Animation	Active Hide ✕
Katherine Corcoran	3623506	ARTS	BBBS	Animation	Active Hide ✕
Andrew Ruzicic	3599587	CLACS	ABAC	Animation	Active Hide ✕
Luke Pales	3587900	ARTS	ABXM	Animation	Active Hide ✕
Lisa Jones	3567116	ARTS	ABCM	Documentary	Active Hide ✕
Sue Ellen Bugay	3564767	ARTS	ABXM	Documentary	Active Hide ✕
Shelly Di Venuto	3589333	ARTS	ABXM	Documentary	Active Hide ✕
Trent Drewitz	3565277	ARTS	ABXM	Documentary	Active Hide ✕
Daniel Jonas	3600122	CLACS	ABXM	Documentary	Active Hide ✕
Steven Kowala	3564574	ARTS	ABXM	Documentary	Active Hide ✕
Matthew Mall	3565934	ARTS	ABXM	Documentary	Active Hide ✕

At the bottom of the borrower list page, you will see a set of buttons:



Show All – use the show all button to display all records in the database

Delete All in Found Set – use this button to delete all the borrowers in your current found set. You may wish to search for certain records and delete them all at once; you can use this feature to do so. However, please be careful, as this cannot be undone. Once the records are deleted, they’re gone for good.

Import Borrowers – use this button to import new borrowers.

Import Borrower Privileges – use this button to import borrower privileges. You will first need to make sure the privileges are defined in system settings before you can import them.

Export Borrowers – use this button to export the current found set of borrowers into excel or csv format.

Resources

<
>
BORROWERS
RESOURCES
BOOKINGS
IN / OUT
REPORTS
SETTINGS
search

Resource List
Resource Detail

<<
<
>
>>
Advance Search

Resource Details				Description
Barcode	00000002	In / Out	IN	
Type	HandyCam			
Group Name	i.e. Groups similar items that can be substituted Apply to Set			
Resource	MiniDV HandyCam Kit 2			
Model				
Location				
Serial No.		Asset No.		
Value	1,200			
Date Acquired		Disposed		

Bookings
Booking History
Block Out
Service Bookings
Service History
Kit Items

Current Booking

From	To	Borrower	Due	
				View

Upcoming Bookings

From	To	Borrower		
				View All

The Resources page allows you to keep record of all the equipment, items, books, rooms etc. that your organization lends out to borrowers.

In /Out – The In / Out field shows if a resources is currently in or out.

Type – You must assign a Type for each Resource before it can be borrowed. If you need to define new Types, you can do so via system settings. You can also assign which Types a Borrower is allowed to borrow via the borrower privilege sets in system settings.

Group Name – Resources that can be swapped for one another should be grouped together. At time of pickup, rather than looking for the exact unique barcode that the borrower booked, you can grab the first available equivalent item and swap the booking. New groups can be set up via system settings. Use the **Apply to Set** button to apply the Group Name to all the records in your current found set.

URL – If a URL is entered, web users can click on the resource title (shown as a link) to view more information regarding the item on an existing web page you may have.

Bookings Tab

Bookings	Booking History	Block Out	Service Bookings	Service Histroy	Kit Items
Current Booking					
From	To	Borrower	Due	View	
Upcoming Bookings					
From	To	Borrower		View All	

The Bookings tab shows which borrower currently has the resource, and also shows a list of upcoming bookings.

Booking History Tab

Bookings	Booking History	Block Out	Service Bookings	Service Histroy	Kit Items
From	To	Borrower	Retruned	View All	

The Booking History tab shows a list of all the borrowers that have borrowed the resource in the past.

Block Out Tab

Bookings		Booking History		Block Out		Service Bookings		Service History		Kit Items		
Type	Start Date	End Date	Start Time	End Time	Mon	Tue	Wed	Thu	Fri	Sat	Sun	New
Type			9:00 am	10:00 am	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>
Resource			10:00 am	12:00 pm	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>

The **Block Out** tab allows you to block out a resource from being borrowed at a particular time during the day. For example, the resource is not available between 10:00AM and 12:00PM every Monday and Tuesday.

The **Type** field allows you to specify from a list of options:

- Resource** – the Block Out applies to the current resource only.
- Type** – the Block Out applies to the Resource Type, and all its related Resources.
- Group** – the Block Out applies to the Resource Group, and all its related Resources.
- All** – the Block Out applies to all resources in the system.

The **Start Date** and **End Date** fields are optional. If you leave them blank, then the block out applies all the time. If specified, then the Block Out only applies during those dates.

The **Start Time** and **End Time** fields are also optional. If you leave them blank, then the Block Out applies for the entire day. If specified, then the Block Out only applies during those times.

Service Booking Tab

Bookings		Booking History		Block Out		Service Bookings		Service History		Kit Items	
Book into Service Now		Schedule a Service		Return from Service							
Current Service											
From	To	Reason									
Edit ✕											
Scheduled Services											
From	To	Reason									

The Service Booking tab allows you to book resources out for service / repair for a specific date range.

Book into Service Now – use this button to place a resource into service immediately. You will be asked to enter a return date and time, and specify a reason for the service.

Schedule a Service – use this button to schedule a service for a later date. You will be asked to enter the start / end dates and times, as well as a reason for the service.

Return from Service – use this button to return a resource back into stock after a service and make it available for bookings.

You can see the current service details if the bookings is currently out for service such as the From and To date / times, as well as the reason. Likewise, you can also see a list of any scheduled services that may be pending.

***NOTE:** If a resource is placed into service, any existing bookings borrowers may have will be overwritten and an email will be sent to the borrower informing them of the service and they will need to book another resource.*

Service History Tab

Bookings	Booking History	Block Out	Service Bookings	Service Histroy	Kit Items
From	To	Reason	View All		
12 Jun 2013 2:47 PM	27 Jun 2013 8:00 AM	broken bracket	View		

The Service History tab shows a list of the past service details.

Kit Items Tab

Bookings		Booking History		Block Out		Service Bookings		Service History		Kit Items	
Qty	Item	Serial No.	Missing	New							
1	Sony DCRTRV6E MiniDV Digital HandyCam		<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>							
2	Infolithium [M] Batteries (1 standard, 1 extended)		<input type="checkbox"/>	<input checked="" type="checkbox"/>							
1	AC Power Pack w/ Power Cord		<input type="checkbox"/>	<input checked="" type="checkbox"/>							
1	FireWire Cable		<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>							
1	HandyCam to RCA Media Cable		<input type="checkbox"/>	<input checked="" type="checkbox"/>							
1	DCRTRV6E Instruction Manual		<input type="checkbox"/>	<input checked="" type="checkbox"/>							

The Kit Items tab allows you to track individual kit items such as a lens, power cord, etc. that ships with the resource.

You can specify the quantity, the name of the individual item and a serial number. You can flag a kit item as missing so that future borrowers don't get questioned about the missing items. You can run a report to see a list of all missing items (see Reports).

Resource List

The Resource List page lets you see a list of resources within your current found set.

***NOTE:** See the section **List Pages** earlier in this document for specific functions of the list page.*

Barcode	Resource	Group	Type	Value	In Out	Due	
00000002	MiniDV HandyCam Kit 2		HandyCam	1,200	IN		Hide ✕
00000001	MiniDV HandyCam Kit 1		HandyCam	1,200	IN		Hide ✕
00000003	MiniDV HandyCam Kit 3	MiniDV HandyCam Kit	HandyCam	1,200	IN		Hide ✕
00000004	MiniDV HandyCam Kit 4	MiniDV HandyCam Kit	HandyCam	1,300	IN		Hide ✕
00000005	MiniDV HandyCam Kit 5	MiniDV HandyCam Kit	HandyCam	1,300	IN		Hide ✕
00000006	MiniDV HandyCam Kit 6	MiniDV HandyCam Kit	HandyCam	1,300	IN		Hide ✕
00000007	MiniDV HandyCam Kit 7	MiniDV HandyCam Kit	HandyCam	1,200	IN		Hide ✕
00000008	MiniDV HandyCam Kit 8	MiniDV HandyCam Kit	HandyCam	1,200	IN		Hide ✕
00000009	MiniDV HandyCam Kit 9	MiniDV HandyCam Kit	HandyCam	1,200	IN		Hide ✕
00000010	MiniDV HandyCam Kit 10		HandyCam	1,200	IN		Hide ✕
00000011	MiniDV HandyCam Kit 11	MiniDV HandyCam Kit	HandyCam	1,200	IN		Hide ✕

At the bottom of the borrower list page, you will see a set of buttons:



Show All – use the show all button to display all records in the database

Delete All in Found Set – use this button to delete all the resources in your current found set. You may wish to search for certain records and delete them all at once; you can use this feature to do so. However, please be careful, as this cannot be undone. Once the records are deleted, they’re gone for good.

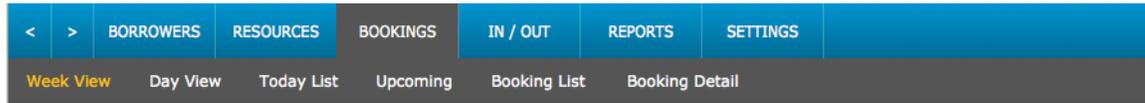
Import Resources – use this button to import new resources.

Import Kit Items – use this button to import kit items for resources.

Export Resources – use this button to export the current found set of resources into excel or csv format.

Export Kit Items – use this button to export the kit items of the current found set of resources into excel or csv format.

Bookings



The **Bookings** Tab has several sub-tabs as shown above.

Week View – Lets you book resources over night or for multiple nights.

Day View – Lets you book resources for a time period on a single day, i.e. 9am to 11am on a Friday.

Today List – Shows a list of resources that are booked for the current day and yet to be picked up. It also shows a list of resources that are yet to be returned.

Upcoming Bookings – Shows a list of upcoming bookings for a specific borrower.

Booking List – Lets you the see the booking data in a list view.

Booking Detail – Lets you see the booking data in a detail view.

Bookings – Week View

The **Week View** page lets you create overnight bookings or multi-night bookings on behalf of borrowers.

Choose a Borrower

To select a borrower either scan their student card, type the student number in manually or choose a borrower from a list via the **Choose** button.

Specify Search Criteria

Use this section to specify the search criteria. You can search by resource name or barcode. You can even scan the barcode directly into this field if you have the item handy.

When you exit the search field, hit enter, or hit the Search button, your search will be performed and a list of matching resources will be displayed.

Specify Filter

Filter

Show Resources

Specify the filter to apply to your list of resources:

Show All – shows all resources the borrower is allowed to borrow

Show Cart – shows the resources the borrower currently has in their cart

Show Loaned – shows the resources the borrower currently has on loan

Show Due – shows resources the borrower currently has on loan that are due back

Show Upcoming – shows any upcoming bookings the borrower may have

Resource Types – A list of resource types will be shown and you can choose to filter by one of the resource types. You can use these filters in conjunction with a search – i.e. only show resources where their type is ‘Accessories’ and contain ‘Nikon’.

Ignore Restrictions / Ignore Closed Time

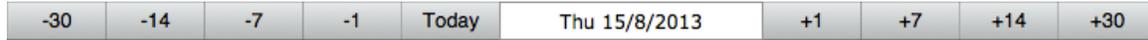
 Ignore Restrictions Ignore Closed Time

Use the **Ignore Restrictions** checkbox to ignore most restrictions imposed upon the borrower and/or resource such as which resources they can borrow, how long they can borrow for etc.

Use the **Ignore Closed Times** checkbox to ignore any closed times such as block outs, weekends, office hours, holidays, term or semester breaks etc.

These features can be limited to specific operators via operator privileges in system settings so only select operators can use these two features.

Day Navigation



Use the day navigation buttons as shown above to scroll the calendar forward or backwards in time. Use the **Today** button to show today on the calendar. Click on the date, to choose a specific date via the date picker.

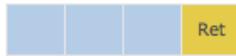
Legend

The graphical calendar uses colors to represent different information

 Available	 Closed (can span)
 Available - Still OUT	 Closed (can't span)
 Reserved by current borrower	 RO Return Only
 Booked by other borrower	 PO Pickup Only
 Booked by current borrower	 Ret Return Day

-  The resource is available for booking
-  The resource is available for booking but not yet returned into stock
-  The resource is reserved and in the cart for the selected borrower
-  The resource has been booked by another borrower and is not available
-  The resource has been booked for the current borrower
-  The office is closed and cant take bookings, but can book over the closure
-  The office is closed and no bookings can span over the closure
-  The resource can only be booked to be returned on this day
-  The resource can only be booked to be picked up on this day
-  A reminder when making a reservation informing you when the item is due back.

Editing / Deleting a Reservation



Simply click on the light blue reservation within the grid to edit or delete it and a popup window will be displayed as shown below.

Booking Details

Borrower

Resource

Booking Type Single Recurring

	Date	Time
From	Fri, 23 Aug 2013	8:00 AM
To	Mon, 26 Aug 2013	8:30 AM

Ignore Restrictions

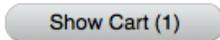
Ignore Closed Time

Delete
Cancel
Save

You can edit the reservation directly via this window.

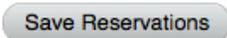
Click the **Save** button to save the changes, or click **Cancel** to discard them. Click the **Delete** button to delete the reservation.

Viewing Resources In The Cart



Click the **Show Cart** button on the bottom right hand side of the page to show only the resources in your cart. The button shows how many resources are in your cart.

Turning Reservations Into Bookings

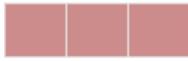


Resources are only temporarily reserved and must be saved in order to become Bookings. To save your reservations, click on the **Save Reservations** button on the bottom right hand side of the page.

If you don't save your reservations, after a period of time or if you quit the system, the reserved items become available to other Borrowers so it's important that reservations are saved.

You'll be asked if you want to save the current reservations when leaving the page as a reminder in case you forget.

Editing / Deleting an Existing Booking



Simply click on the dark red booking within the grid to edit or delete it and a popup window will be displayed as shown below.

Booking Details

Borrower: Aaron Calleja
Resource: Tripod 5

Booking Type: Single Recurring

	Date	Time
From	Fri, 23 Aug 2013	8:00 AM
To	Mon, 26 Aug 2013	8:30 AM

Ignore Restrictions
 Ignore Closed Time

You can edit the booking directly via this window.

Click the **Save** button to save the changes, or click **Cancel** to discard them. Click the **Delete** button to delete the booking.

Bookings – Day View

The **Bookings / Day View** page lets you create time-based bookings for a single day, i.e. 9am to 11am on Friday.

Choose a Borrower

To select a borrower either scan their student card, type the student number in manually or choose a borrower from a list via the **Choose** button.

Specify Search Criteria

Use this section to specify the search criteria. You can search by resource name or barcode. You can even scan the barcode directly into this field if you have the item handy.

When you exit the search field, hit enter, or hit the Search button, your search will be performed and a list of matching resources will be displayed.

Specify Filter

Filter

Show Resources

Specify the filter to apply to your list of resources:

Show All – shows all resources the borrower is allowed to borrow

Show Cart – shows the resources the borrower currently has in their cart

Show Loaned – shows the resources the borrower currently has on loan

Show Due – shows resources the borrower currently has on loan that are due back

Show Upcoming – shows any upcoming bookings the borrower may have

Resource Types – A list of resource types will be shown and you can choose to filter by one of the resource types. You can use these filters in conjunction with a search – i.e. only show resources where their type is ‘Accessories’ and contain ‘Nikon’.

Ignore Restrictions / Ignore Closed Time

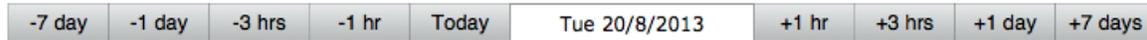
 Ignore Restrictions Ignore Closed Time

Use the **Ignore Restrictions** checkbox to ignore most restrictions imposed upon the borrower and/or resource such as which resources they can borrow, how long they can borrow for etc.

Use the **Ignore Closed Times** checkbox to ignore any closed times such as block outs, weekends, office hours, holidays, term or semester breaks etc.

These features can be limited to specific operators via operator privileges in system settings so only select operators can use these two features.

Day Navigation



Use the day navigation buttons as shown above to scroll the calendar forward or backwards in time. Use the **Today** button to show today on the calendar. Click on the date, to choose a specific date via the date picker.

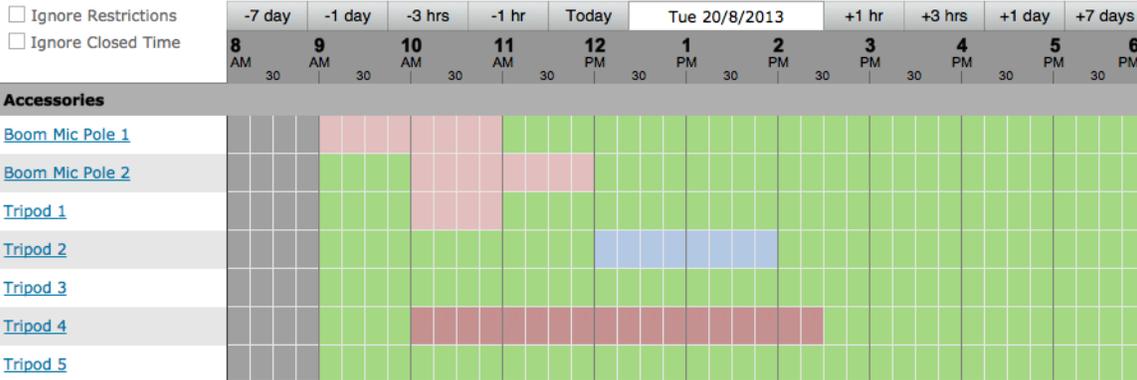
Legend

The graphical calendar uses colors to represent different information



-  The resource is available for booking
-  The resource is available for booking but not yet returned into stock
-  The resource is reserved and in the cart for the selected borrower
-  The resource has been booked by another borrower and is not available
-  The resource has been booked for the current borrower
-  The office is closed and cant take bookings, but can book over the closure
-  The office is closed and no bookings can span over the closure

Making a Reservation



To make a reservation, simply click on the calendar grid (as shown above) corresponding to the resource and start time you'd like to reserve, and you will be presented a pop-up window as shown below:

Booking Details

Borrower: Aaron Calleja
Resource: Tripod 2

Booking Type: Single Recurring

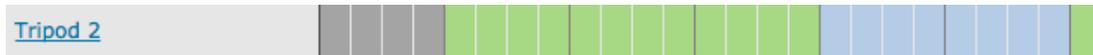
	Date	Time
From	Tue, 20 Aug 2013	12:00 PM
To	Tue, 20 Aug 2013	2:00 PM

Ignore Restrictions
 Ignore Closed Time

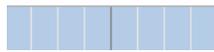
Booking Type – Choose Single if you'd like to create a one-off booking, or choose Recurring if you'd like to repeat the booking on a weekly basis. If choosing Recurring, additional options are made available such as the end date and a button to create a weekly recurring booking for rest of the semester.

From / To – Specify the From time, as well as the To time.

Click on the **Add To Cart** button to save your reservation and it will show up in your calendar as light blue (see below), or choose **Cancel** to cancel the reservation.



Editing / Deleting a Reservation



Simply click on the light blue reservation within the grid to edit or delete it and a popup window will be displayed as shown below.

Booking Details

Borrower:

Resource:

Booking Type: Single Recurring

	Date	Time
From	Tue, 20 Aug 2013	12:00 PM
To	Tue, 20 Aug 2013	2:00 PM

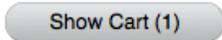
Ignore Restrictions

Ignore Closed Time

You can edit the reservation directly via this window.

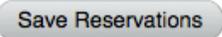
Click the **Save** button to save the changes, or click **Cancel** to discard them. Click the **Delete** button to delete the reservation.

Viewing Resources In The Cart



Click the **Show Cart** button on the bottom right hand side of the page to show only the resources in your cart. The button shows how many resources are in your cart.

Turning Reservations Into Bookings



Resources are only temporarily reserved and must be saved in order to become Bookings. To save your reservations, click on the **Save Reservations** button on the bottom right hand side of the page.

If you don't save your reservations, after a period of time or if you quit the system, the reserved items become available to other Borrowers so it's important that reservations are saved.

You'll be asked if you want to save the current reservations when leaving the page as a reminder in case you forget.

Editing / Deleting an Existing Booking



Simply click on the dark red booking within the grid to edit or delete it and a popup window will be displayed as shown below.

Booking Details

Borrower
Resource

Booking Type Single Recurring

	Date	Time
From	Tue, 20 Aug 2013	12:00 PM
To	Tue, 20 Aug 2013	2:00 PM

Ignore Restrictions
 Ignore Closed Time

You can edit the booking directly via this window.

Click the **Save** button to save the changes, or click **Cancel** to discard them. Click the **Delete** button to delete the booking.

Bookings – Today List

< > BORROWERS RESOURCES BOOKINGS IN / OUT REPORTS SETTINGS						
Week View Day View Today List Upcoming Booking List Booking Detail						
To be picked up To be returned						
Barcode	Resource	Location	Borrower	From	In/Out	
00000049	Boom Mic Pole 1	Room 23	Aaron Calleja	3:00 PM	IN	
00000042	Tripod 2		Aaron Calleja	3:00 PM	IN	
00000018	Digital Still Camera Kit 1		Aaron Calleja	3:00 PM	IN	
00000031	CD Burner Kit 1		Aaron Calleja	3:00 PM	IN	

Print today's pickups

There are two tabs on the **Today List** screen. One allows you to view all resources that are due to be picked up today, whereas the other tab allows you to view all resources that are due to be returned today. You can print either list via the print button down below.

Bookings – Upcoming

<
>
BORROWERS
RESOURCES
BOOKINGS
IN / OUT
REPORTS
SETTINGS

Week View
Day View
Today List
Upcoming
Booking List
Booking Detail

Borrower

Stud#/Bcode	Borrower	
5561110	Aaron Calleja	<input type="button" value="Choose"/>

Barcode	Resource	From	To	
00000049	Boom Mic Pole 1	Wed, 21 Aug 2013 3:00 PM	Thu, 22 Aug 2013 8:00 AM	✕
00000042	Tripod 2	Wed, 21 Aug 2013 3:00 PM	Thu, 22 Aug 2013 8:00 AM	✕
00000018	Digital Still Camera Kit 1	Wed, 21 Aug 2013 3:00 PM	Thu, 22 Aug 2013 8:00 AM	✕
00000031	CD Burner Kit 1	Wed, 21 Aug 2013 3:00 PM	Thu, 22 Aug 2013 8:00 AM	✕
00000045	Tripod 5	Fri, 23 Aug 2013 8:00 AM	Mon, 26 Aug 2013 8:30 AM	✕
00000047	Tripod 7	Mon, 2 Sep 2013 8:30 AM	Tue, 3 Sep 2013 8:00 AM	✕

The **Upcoming** page shows a list of resources that the selected borrower has booked and hasn't yet picked up.

Bookings – Booking List / Detail

<		>		BORROWERS	RESOURCES	BOOKINGS	IN / OUT	REPORTS	SETTINGS	search	
Week View		Day View		Today List		Upcoming	Booking List	Booking Detail		Advance Search	
<input type="checkbox"/> Group records (when sort by column)											Record: 44 of 46 - Total: 46
Barcode	Resource	Borrower	Booked	From	To	Due	Status				
00000042	Tripod 2	Aaron Calleja	8/08/13	14/08/13 1:00 PM	14/08/13 4:00 PM		Missed	Hide ✕			
00000018	Digital Still Camera Kit 1	Aaron Calleja	8/08/13	14/08/13 1:00 PM	14/08/13 4:00 PM		Missed	Hide ✕			
00000031	CD Burner Kit 1	Aaron Calleja	8/08/13	14/08/13 1:00 PM	14/08/13 4:00 PM		Missed	Hide ✕			
00000047	Tripod 7	Aaron Calleja	14/08/13	2/09/13 8:30 AM	3/09/13 8:00 AM		Booked	Hide ✕			
00000045	Tripod 5	Aaron Calleja	15/08/13	23/08/13 8:00 AM	26/08/13 8:30 AM		Booked	Hide ✕			
00000049	Boom Mic Pole 1	Andrew Khuu	16/08/13	20/08/13 9:00 AM	20/08/13 11:00 AM		Missed	Hide ✕			
00000050	Boom Mic Pole 2	Andrew Khuu	16/08/13	20/08/13 10:00 AM	20/08/13 12:00 PM		Missed	Hide ✕			
00000041	Tripod 1	Andrew Khuu	16/08/13	20/08/13 10:00 AM	20/08/13 11:00 AM		Missed	Hide ✕			
00000044	Tripod 4	Aaron Calleja	16/08/13	20/08/13 10:00 AM	20/08/13 2:30 PM		Missed	Hide ✕			
00000049	Boom Mic Pole 1	Aaron Calleja	21/08/13	21/08/13 3:00 PM	22/08/13 8:00 AM		Booked	Hide ✕			
00000042	Tripod 2	Aaron Calleja	21/08/13	21/08/13 3:00 PM	22/08/13 8:00 AM		Booked	Hide ✕			

The **Booking List** page allows you to see the raw booking data, search for bookings etc.

<		>		BORROWERS	RESOURCES	BOOKINGS	IN / OUT	REPORTS	SETTINGS	search	
Week View		Day View		Today List		Upcoming	Booking List	Booking Detail	Advance Search		
Booking Details											
Barcode	00000042										
Resource	Tripod 2										
Supp. Items											
Borrower	5561110	Aaron Calleja									
Date Booked	21/8/2013										
From	21/8/2013	3:00 PM									
To	22/8/2013	8:00 AM									
Due											
Returned											
Status	Booked										
Service Reason											

The **Booking Detail** page allows you to see the raw booking data in more detail.

In / Out



The **In / Out** tab has two sub-tabs as shown above.

Pickup – lets you dispatch goods that have been booked by a borrower.

Return – allows you to return goods back into stock.

In / Out - Pickup

<
>
BORROWERS
RESOURCES
BOOKINGS
IN / OUT
REPORTS
SETTINGS

Pickup Return

Bookings for:

Stud#/Bcode	Borrower	
5561110	Aaron Calleja	Choose

Transfer booking to following borrower after pickup:

Stud#/Bcode	Borrower	
		Choose

Barcode	Resource	Description	Time	Supplementary Items	Location	All	Pk-up	In/Out	
00000041	Swap Tripod 1		12:00		Add	<input type="checkbox"/>		IN	✕
00000042	Swap Tripod 2		12:00		Add	<input type="checkbox"/>		IN	✕
00000055	Swap MiniDV Cam 4		12:00		Add	<input type="checkbox"/>		IN	✕
00000062	Swap Scanner 1	Canon CanoScan N1240U	12:00		Add	<input type="checkbox"/>		IN	✕

Reprint Last Loan Agreement

Pickup Selected Resources

The **Pickup** page allows a borrower to pick up items that they have booked. By either scanning the student card or manually entering the student number, you will see a list of resources that the borrower has booked. The In/Out field indicates whether the item is currently **IN** or **OUT**.

Remove resources

You can remove resources from the booking by clicking on the X button on the right hand side of the row.

Ready for pickup

Depending on your system settings, all resources may be marked ready for pickup by default. You can use the checkbox to select or deselect which items are being picked up. To check or uncheck all checkboxes, use the ‘All’ button above the checkbox column.

Transfer bookings to other borrowers

You can transfer bookings to another borrower via the Transfer section on the top right-hand side of the page.

Supplementary items

If you're throwing in any one-off supplementary items to accompany the booking such as a cable etc., you can record this against the booking via the Supplementary Items section.

Simply click on the **Add** button and you'll be asked to enter the supplementary items. When the goods are returned, you will be able to see if the booking had any supplementary items and check if they have all been returned.

Swap resources

You can swap a resource with another suitable substitute resource at time of pickup.

This could be useful if you accidentally picked up the correct item but the wrong barcode, you can simply swap the booking with the barcode of the resource you have in your hands rather than go back and look for the correct barcode.

This feature could also be useful if the resource you picked up is faulty, you can easily swap the booking over to the replacement item.

To swap a resource, click on the **Swap** button located next to the barcode for the resource you'd like to replace. A popup window will be presented listing all the resources belonging to the same group (as set within the Resources module). Simply select the replacement resource, and the Booking will be swapped.

In order to take advantage of this feature, resources need to be grouped together by specifying similar items with a Group Name via the Resources page. Please see the Resources section within this document for more details.

Dispatch goods

To dispatch the goods, click the **Pickup Selected Resources** button. Depending on your system settings, a Loan Agreement may be printed which the borrower can sign. The resources will be flagged as OUT, and that the borrower has possession of the items.

Reprint Last Loan Agreement

When clicking the **Pickup Selected Resources** button, depending on your system settings, a Loan Agreement may be printed. After the resources have been dispatched, you may want to reprint the loan agreement because the printer jammed or was out of ink etc. To do so, use the **Reprint Last Loan Agreement** button.

In / OUT - Return

Navigation bar: < > BORROWERS RESOURCES BOOKINGS IN / OUT REPORTS SETTINGS

Pickup Return

Return Resources by Barcode

Barcode 1. Enter or scan barcodes one by one
2. Press the Return button or Return Key after each code

Return Resources by Student

Stud#/Bcode Borrower Show Resources due for return 1. Enter the student number / barcode
2. Select Resources & press Return button

5561110 Aaron Calleja

Barcode	Resource	Supplementary Items	Location	To	Due	All	Return
0000049	Boom Mic Pole 1		Room 23	17/09/14 10:00 AM	Overdue 44 days	View	<input checked="" type="checkbox"/>
0000018	Digital Still Camera Kit 1			17/09/14 10:00 AM	Overdue 44 days	View	<input checked="" type="checkbox"/>
0000045	Tripod 5			17/09/14 10:00 AM	Overdue 44 days	View	<input checked="" type="checkbox"/>
0000050	Boom Mic Pole 2			17/09/14 10:00 AM	Overdue 44 days	View	<input checked="" type="checkbox"/>

To return resources back into stock you can do so via the **Return** page as shown above. There are two ways to return resources ... you can return resources by barcode or by borrower.

Return Resources by Barcode

Return Resources by Barcode

Barcode 1. Enter or scan barcodes one by one
2. Press the Return button or Return Key after each code

Simply scan the item barcode or type the barcode manually into the field provided and hit enter, and the resource will be returned back into stock.

Return Items by Student

Return Resources by Student

Stud#/Bcode Borrower Show
5561110 Aaron Calleja Choose Resources due for return 1. Enter the student number / barcode
2. Select Resources & press Return button

Barcode	Resource	Supplementary Items	Location	To	Due	Return
00000049	Boom Mic Pole 1		Room 23	17/09/14 10:00 AM	Overdue 44 days	View <input checked="" type="checkbox"/>
00000018	Digital Still Camera Kit 1			17/09/14 10:00 AM	Overdue 44 days	View <input checked="" type="checkbox"/>
00000045	Tripod 5			17/09/14 10:00 AM	Overdue 44 days	View <input checked="" type="checkbox"/>
00000050	Boom Mic Pole 2			17/09/14 10:00 AM	Overdue 44 days	View <input checked="" type="checkbox"/>

Return Selected Resources

Instead of returning resources by scanning them one at a time, a more convenient method may be to scan the student card or enter the student number manually into the field provided and view a list of all the resources that are currently due.

To return resources, simply select which items you would like to return by using the checkbox on the right of the row, then click the **Return Selected Resources** button. To check or uncheck all checkboxes, use the 'All' button above the checkbox column.

You may choose to show all the resources that are currently due to be returned, or you can choose to view all resources on loan to the student regardless if the items are due back or not. You can toggle between both options via the **Show** field.

If the booking has any once-off supplementary items such as a cable etc., you will see any such items listed on the page. When returning the goods, you will be asked to confirm if all the supplementary items have been returned.

Reports

Resources Reports		Borrower Reports	
Resource Usage	Print	Overdue Borrowers	Print View
Resource Usage by Type	Print	Borrower Demerits	Print View
Resource Usage by Group	Print	Borrower Usage	Print
Resource Usage by Time	Print	Resources On Loan	Print View
Resources On Loan	Print View		
Resources Listing*	Print		
Resources Overdue	Print View		
Currently In Service	Print View		
Service History	Print		
Missing Kit Items	Print		

BookingPOINT has a number of predefined reports that you can run.

To run a report, either click on a **Print** button corresponding to a particular report, or click on a **View** button to see the actual records.

If you purchase an open license you will be able to create your own reports and modify the existing ones. Please make sure that you are familiar with FileMaker before you attempt to make these changes.

Alternatively, if you prefer to have us create the reports for you please contact us and we will discuss your requirements further.

Settings - General

The **General** tab allows you to specify general system settings.

Bookings / Demerit Points

Maximum recurring weeks – the maximum number of weeks for a recurring bookings

Weeks bookings can be made in advance – how many weeks ahead of time a booking can be made

Web users can see who booked resources – whether or not web users can see the names of other borrowers that have booked a resource.

Auto-select all bookings at Pickup – whether resources will be auto selected on the pickup screen.

Demerit points per day – how many demerit points a borrower will accrue each day they have overdue resources.

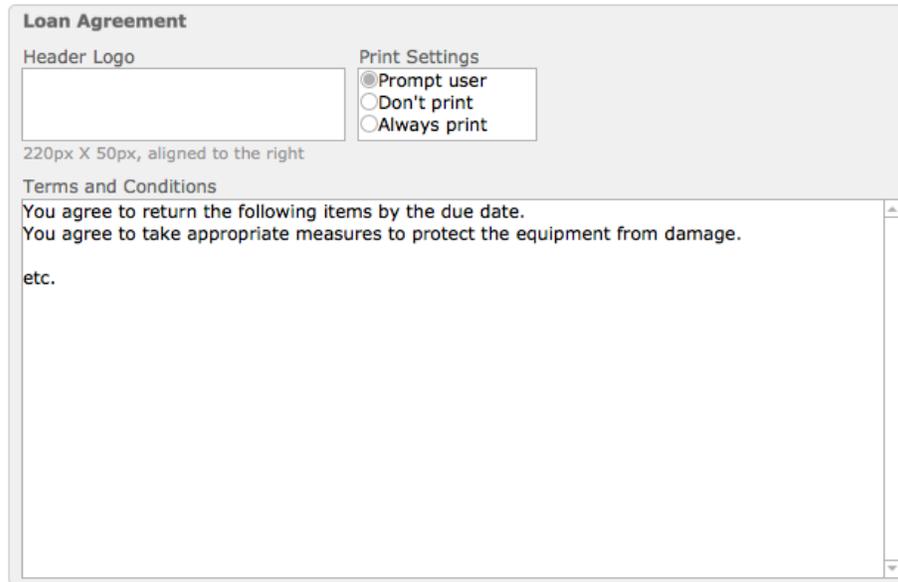
Demerits required for suspension – how many points before borrowers will be automatically suspended.

Weeks before demerits expire – how many weeks before demerit points automatically expire.

Print Settings

Paper Size - Allows you to specify the paper size use when printing. There are 3 options to choose from: A4, Letter and Legal. The default is A4.

Loan Agreement



The screenshot shows a configuration window titled "Loan Agreement". It contains three main sections:

- Header Logo:** A text input field with a placeholder "Header Logo" and a note below it stating "220px X 50px, aligned to the right".
- Print Settings:** A group box containing three radio button options:
 - Prompt user
 - Don't print
 - Always print
- Terms and Conditions:** A large text area with a scroll bar. It contains the text: "You agree to return the following items by the due date. You agree to take appropriate measures to protect the equipment from damage. etc."

The **Loan Agreement** section allows you to specify your own terms and conditions for borrowers to sign.

Header Logo – lets you add your own logo to the printed Loan Agreements.

Print Settings – allows you to choose from three options:

- Don't print – never prints a loan agreement at time of pickup
- Always print – always prints a loan agreement at time of pickup
- Prompt user – asks the user if they want to print the loan agreement at pickup

Settings – Office Hours

<		>		BORROWERS	RESOURCES	BOOKINGS	IN / OUT	REPORTS	SETTINGS	
General		Office Hours		Types/Groups	Users/Security	Email	SMS	Web	Scheduler	Update/Renewal

Office Hours													
Monday		Tuesday		Wednesday		Thursday		Friday		Saturday		Sunday	
From	To	From	To	From	To	From	To	From	To	From	To	From	To
9:00 AM	5:00 PM	9:00 AM	5:00 PM	9:00 AM	5:00 PM	9:00 AM	5:00 PM	9:00 AM	5:00 PM				
Pickup	<input checked="" type="checkbox"/>	Pickup	<input checked="" type="checkbox"/>	Pickup	<input checked="" type="checkbox"/>	Pickup	<input checked="" type="checkbox"/>	Pickup	<input checked="" type="checkbox"/>	Pickup	<input type="checkbox"/>	Pickup	<input type="checkbox"/>
Return	<input checked="" type="checkbox"/>	Return	<input checked="" type="checkbox"/>	Return	<input checked="" type="checkbox"/>	Return	<input checked="" type="checkbox"/>	Return	<input checked="" type="checkbox"/>	Return	<input type="checkbox"/>	Return	<input type="checkbox"/>
Return By	10:00 AM	Return By	10:00 AM	Return By	10:00 AM	Return By	10:00 AM	Return By	10:00 AM	Return By		Return By	
Pickup At	11:00 AM	Pickup At	11:00 AM	Pickup At	11:00 AM	Pickup At	10:00 AM	Pickup At	11:00 AM	Pickup At		Pickup At	

Closed for business				Clear
Close Date	Reopen Date	Type	Description	

Office Hours

You can specify which days you are open by specifying the office hours for each day of the week. You can have several blocks during the day where you are open and closed, i.e. closed between 1pm and 2pm for lunch.

Pickup checkbox – specifies if resources can be picked up on this day

Return checkbox – specifies if resources can be returned on this day

Return By – the default return time for new overnight bookings

Pickup At – the default pickup time for new overnight bookings

Closed for business

You can enter specific days that your Loans Office is closed such as public holidays, term and semester breaks. Borrowers will not be able to book resources on closed days.

To create a new entry, just start typing in one of the fields within the first blank line.

- Specify the date the office is closed
- Specify the reopening date
- Select the type from the drop down list (each type behaves differently)
- Enter a description

If you want to remove an entry, click on the X next to the line you want to remove. Or if you would like to clear the entire set, click on the **Clear** button.

Settings - Types / Groups

<
>
BORROWERS
RESOURCES
BOOKINGS
IN / OUT
REPORTS
SETTINGS

General
Office Hours
Types/Groups
Users/Security
Email
SMS
Web
Scheduler
Update/Renewal

Resource Types

Type	Overnight Bookings	Same Day Bookings	Requires pickup	New
Accessories	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>
HandyCam	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>
Hard Drive	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>
iPods	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>
Projector	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>
Rooms	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>
Scanner	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>
Trolley	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>
	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>

Resource Groups

Group Name	New
AV Trolley	<input checked="" type="checkbox"/>
Boom Mic Pole	<input checked="" type="checkbox"/>
CD Burner Kit	<input checked="" type="checkbox"/>
Digital Still Camera Kit	<input checked="" type="checkbox"/>
DVD Burner Kit	<input checked="" type="checkbox"/>
iPod Touch	<input checked="" type="checkbox"/>
MiniDV Cam	<input checked="" type="checkbox"/>
MiniDV HandyCam Kit	<input checked="" type="checkbox"/>
NEC Data Projector K	<input checked="" type="checkbox"/>
NEC Data Projector Kit	<input checked="" type="checkbox"/>
Scanner	<input checked="" type="checkbox"/>
Tripod	<input checked="" type="checkbox"/>
	<input checked="" type="checkbox"/>

Use the **Types / Groups** page to help you categorise the resources by type and group.

Resource Types

You can nominate whether or not a resource can be booked overnight or same day. For example you may have rooms you'd like to offer to your borrowers, but only want to allow them to book rooms for a few hours on a single day, then you simply need to deselect the **Overnight** checkbox and select the **Same Day** checkbox.

Use the **Pickup Required** checkbox to specify if a resource requires pickup. For example a room may not require pickup if the room is always unlocked and the borrower can simply make their way to the booked room. On the other hand, if the rooms are always locked, then the borrower will need to pickup the keys, so pickup is required and should be selected.

To delete a resource type, click on the **X** button to the right of the record you'd like to delete.

To create a new resource type click on the **New** button at the top right hand side of the resource type list.

Resource Groups

Resource groups are a way to group multiple items of the same resource. For example, you may have 5 Nikon D100 Camera's – this will allow you to group the 5 cameras together so that you can easily substitute a camera for another if one is faulty or no longer available.

The resource groups are available in the resources module, and you can specify which resource belongs to which group.

To create a new resource group, you must enter them via this page. Click on the **New** button above the resource group list.

To delete a resource group simply click on the **X** button next to the group you want to delete.

Settings – Users / Security

<
>
BORROWERS
RESOURCES
BOOKINGS
IN / OUT
REPORTS
SETTINGS

General
Office Hours
Types/Groups
Users/Security
Email
SMS
Web
Scheduler
Update/Renewal

Borrower Privileges

Privilege [New](#)

Staff	Dupl.	Edit	✕
Student	Dupl.	Edit	✕

Operator Privileges

Privilege [New](#)

Admin	Edit	✕
Non-Admin	Edit	✕

Operators

Name	Username	Privilege Set		New
Joe Bloggs	joe	Non-Admin	Edit	✕
user user	user	Admin	Edit	✕

The **Users / Security** page allows you to set borrower privileges, operator privileges and operator accounts.

Borrower Privileges

Borrower privileges allow you to nominate what each group of borrowers can and cant borrow. You can also specify various restrictions.

To delete a privilege set, click on the X button corresponding to the unwanted privilege set. Make sure that no borrower is still assigned to the privilege set otherwise they wont be able to borrow any resources.

Borrower Privileges

Borrower Privileges

Privilege	New		
Staff	Dupl.	Edit	✕
Student	Dupl.	Edit	✕

Click **New** to create a new Borrower Privilege, **Edit** to edit an exiting Borrower Privilege and **Dupl.** to duplicate.

Created / Edit Borrower Privileges

When creating or editing a privilege set you'll see the following page:

Privilege Settings

Privilege Details

Privilege Set *

Expiry Date

Account Status

Privilege Options

Maximum Booking Days (by Operator)

Maximum Booking Days (by Borrower)

Default Booking Days *

Allow Recurring Bookings

Maximum Recurring Booking Weeks

Allow Bookings to be extended after pickup

Maximum number of extensions

Accrue Demerit Points

Ignore Term Breaks

Ignore Semester Breaks

Ignore Closed Time

Resources Types Allowed for Borrowing

HandyCam	Restrictions ✕
Hard Drive	Restrictions ✕
Projector	Restrictions ✕
Scanner	Restrictions ✕
Trolley	Restrictions ✕
Rooms	Restrictions ✕
	Restrictions ✕

* Required

Privilege Set – the name of the privilege set

Expiry Date – (optional) if entered, the date the privilege set will expire

Maximum Booking Days (by Operator) – the maximum number of days an operator is allowed to book a resource on behalf of the borrower

Maximum Booking Days (by Borrower) – the maximum number of days a borrower can book resources via the web.

Default Booking Days – the default number of days for overnight / multi-day bookings.

Allow Recurring Bookings – allows borrowers to make recurring bookings

Maximum Recurring Booking Weeks – the maximum number of weeks borrowers are allowed to create recurring bookings

Allow Bookings to be extended after pickup – allows borrowers to extend their own bookings after pickup without having to return them and book them again.

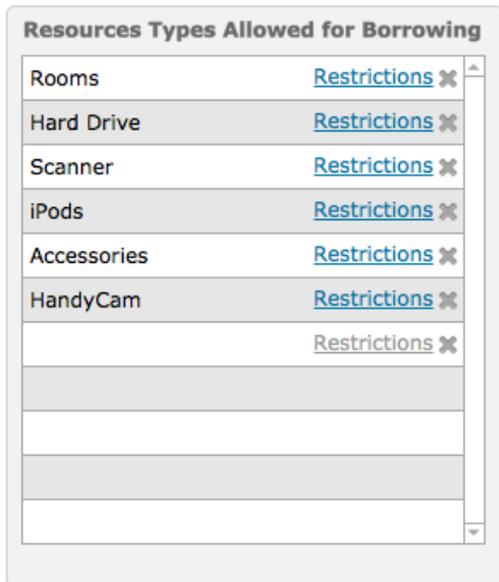
Maximum number of extensions – the maximum number of times a booking can be extended. Leave blank for unlimited.

Accrue Demerit Points – borrowers will accrue demerit points for late returns

Ignore Term Breaks – allows bookings during term breaks

Ignore Semester Breaks – allows bookings during semester breaks

Ignore Closed Time – allows bookings during closed times



The **Resources Types Allowed for Borrowing** section allows you to specify what resource types borrowers are allowed to borrow. Simply click on the first available blank line and choose the resource type from the drop down list.

The **Restrictions** button allows you to specify various restrictions for the resource type.

Restrictions

Restrictions

Max Bookings at once = Number of bookings borrowers can make at once for the same time slot
 Max Bookings = Maximum number of resources borrowers can book within a given period
 Booking Duration = Maximum number of hours or days a resource can be booked at a time.
 Outside office hrs = Resources that don't require pickup (i.e. rooms) can be booked after hours

All Resource's Within Type		Max. Bookings		Booking Duration		Outside office hrs	Max bookings at once
Resource Type		Max Bookings	Period (Days)	Duration Method	Max Duration	Max Duration (hours)	
Hard Drive							

All Resource's Within Group		Exclude	Max. Bookings		Booking Duration		Outside office hrs	Max bookings at once
Group			Max Bookings	Period (Days)	Duration Method	Max Duration	Max Duration (hours)	
CD Burner Kit	<input type="checkbox"/>							
DVD Burner Kit	<input type="checkbox"/>							

Individual Resource Items		Exclude	Max. Bookings		Booking Duration		Outside office hrs	Max bookings at once
Resource			Max Bookings	Period (Days)	Duration Method	Max Duration	Max Duration (hours)	
CD Burner Kit 1	<input type="checkbox"/>							
CD Burner Kit 2	<input type="checkbox"/>							
CD Burner Kit 3	<input type="checkbox"/>							
CD Burner Kit 4	<input type="checkbox"/>							
DVD Burner Kit 1	<input type="checkbox"/>							

Close

The restrictions page can be used to set up certain restrictions for the resource type. For example, you can specify the maximum number of times a borrower can book a resource during a specific period, or you can specify the maximum duration for a given booking.

You can break this down to different levels. You can restrict the entire resource type, or you could restrict a specific resource group or you could restrict an individual resource. You can also mix and match however you like.

To restrict all resources within the resource type, use the following section:

All Resource's Within Type		Max. Bookings		Booking Duration		Outside office hrs	Max bookings at once
Resource Type		Max Bookings	Period (Days)	Duration Method	Max Duration	Max Duration (hours)	
Hard Drive		3	14	Days	2		1

To restrict all resources within a group, use the following section:

All Resource's Within Group							
Group	Exclude	Max. Bookings		Booking Duration		Outside office hrs	Max bookings at once
		Max Bookings	Period (Days)	Duration Method	Max Duration	Max Duration (hours)	
CD Burner Kit	<input type="checkbox"/>						
DVD Burner Kit	<input type="checkbox"/>						

To restrict individual resources, use the following section:

Individual Resource Items							
Resource	Exclude	Max. Bookings		Booking Duration		Outside office hrs	Max bookings at once
		Max Bookings	Period (Days)	Duration Method	Max Duration	Max Duration (hours)	
CD Burner Kit 1	<input type="checkbox"/>						
CD Burner Kit 2	<input type="checkbox"/>						
CD Burner Kit 3	<input type="checkbox"/>						
CD Burner Kit 4	<input type="checkbox"/>						
DVD Burner Kit 1	<input type="checkbox"/>						

Exclude – allows particular groups or resources to be excluded for bookings.

Max. Bookings – the maximum number of bookings within a certain period. For example a maximum of 1 booking per 7 days, or a maximum of 2 bookings per 30 days.

Booking Duration – the maximum amount of days or time a resource is allowed to be booked at the one time. For example a maximum of 3 hours at a time, or a maximum of 5 days at a time.

Outside office hours – this section is grayed out if the resource cannot be booked outside office hours. A resource type that is flagged as Requires Pickup cannot be booked after hours, only resources that don't require pickup such as rooms. This section allows you to specify how many hours a resource can be booked at the one time after hours.

Max Bookings at once – how many bookings of the same resource the borrower can have at the one time. Note, this option does not apply to individual resources as you can only ever have 1 of each at the one time.

NOTE: You can mix and match restrictions however you like. You can have a restriction for the entire resource type as well as restrictions for groups and individual items all at the same time. Individual resource restrictions overwrite the group restrictions and the group restrictions overwrite the resource type restrictions.

Operator Privileges

Operator Privileges

Privilege	New
Admin	Edit ✕
Non-Admin	Edit ✕

The **Operator Privileges** allow you to set up different roles for administrative users. For example, some admin user may have full access to BookingPOINT, configure settings, view reports, etc, where as other users may only check resources in and out.

To create a new operator privilege set, click on the **New** button above the list. To delete an operator privilege set, click on the **X** for the unwanted item.

NOTE: You cannot edit or delete the **Admin** privilege set. The Admin privilege set is a super-user privilege set and any operator assigned to the privilege set will have full access to BookingPOINT.

To edit an operator privilege set, click on the edit button corresponding to the privilege set you want to edit, and the following window will open:

Operator Privileges

Non-Admin privilege set

<input checked="" type="checkbox"/>	Create and edit Operators
<input checked="" type="checkbox"/>	Delete Operators
<input type="checkbox"/>	Create and edit Resources
<input type="checkbox"/>	Delete Resources
<input type="checkbox"/>	Create and edit Borrowers
<input type="checkbox"/>	Delete Borrowers
<input checked="" type="checkbox"/>	Access Settings
<input type="checkbox"/>	Access Reports
<input checked="" type="checkbox"/>	Import and Export data
<input type="checkbox"/>	Use the 'Apply to Set' function
<input type="checkbox"/>	Allow ignore restrictions / closed times when booking

= Access = No Access

[Done](#)

Via this pop-up window, you can specify what the operators can and can't do. Please note, not everything within BookingPOINT can be restricted at this point in time; only certain features such as creating, editing, deleting records, viewing reports etc.

Operators

Operators					
First name	Surname	Username	Privilege Set	Edit	New
Joe	Bloggs	joe	Non-Admin	Edit	✕
user	user	user	Admin	Edit	✕

The **Operators** section allows you to create user accounts for operators so they can access the BookingPOINT system. Each operator will have their own log-in and password to get into BookingPOINT.

To create a new operator, click on the **New** button above the list of operators.

To edit an operator, click on the **Edit** button corresponding to the operator you want to edit.

To delete an operator, click on the X button against the unwanted operator record.

PLEASE NOTE: By default, BookingPOINT does not use operator log-ins. This means, anyone can log-into BookingPOINT via FileMaker Pro without specifying any user name and password.

To turn the login feature on, you must edit the default operator account. The default operator account has a first name of 'user', surname of 'user' and the login name and password are also both 'user'. When this operator account exists, BookingPOINT automatically logs in.

You cannot delete the default user account because you are currently logged in under this account. You can only edit it. You will need to change the user name and password for this account, then next time you log in you will be prompted to enter your account details.

Settings – Email

Settings – Email

Navigation: < > BORROWERS RESOURCES BOOKINGS IN / OUT REPORTS SETTINGS

Sub-navigation: General Office Hours Types/Groups Users/Security **Email** SMS Web Scheduler Update/Renewal

Sub-sections: Setup Overdue Suspension Return Reminder Loan Agreement Service

Email Setup

From Address * Required field

From Name * Required field

BCC Address

Mail server settings (Applies to both SMS & Email)

SMTP * Required field

Port 25

Authentication Encryption None

Username * Required field

Password [Set](#)

Activate Email Reminders

Enable 'Return Reminder' Email Notify borrowers when items are due back the next day.

Email Loan Agreement at pickup Attach the loan agreement and email it to borrower at time of pickup.

NOTE: This section is only applicable to BookingPOINT Deluxe when used with the built in FileMaker Server / FileMaker Server Advanced scheduler.

The **Email** page allows you to specify the email account settings in order for BookingPOINT to be able to send emails.

Email Setup – Allows you to specify the From Address and Name for the emails that are sent out to borrowers. You can also specify a BCC address if you'd like to receive a copy of the emails as well.

Mail server settings – allows you to specify the outbound SMTP settings so BookingPOINT can send emails. Please note these settings are shared by both Email and SMS messages.

Activate Email Reminders – allows you notify borrowers when items are due back the next day, and to attach the loan agreement to emails at time of pickup.

Overdue / Suspension / Return Reminder / Loan Agreement / Service

Setup	Overdue	Suspension	Return Reminder	Loan Agreement	Service
-------	---------	------------	-----------------	----------------	---------

Subject
Overdue Notice

Demerit Points Email
Attention <<Borrower>>,
The following resources are overdue:
<<Resources>>
You have been penalised with <<DailyDemerits>> demerit points and will continue to accumulate

Non-Demerit Points Email
Attention <<Borrower>>,
The following resources are overdue:
<<Resources>>
Please return the equipment as soon as possible.

Available Tags
<<Borrower>>
<<Resources>>
<<DailyDemerits>>
<<BorrowerDemerits>>
<<DemeritSuspension>>

You can customize the email messages that are sent to borrowers via the tabs on this page.

Overdue - the email sent to borrowers when they have an overdue item

Suspension – the email sent to borrowers when they have been suspended

Return Reminders – the email sent to remind borrowers a day before their resources a due back the next day

Loan Agreement – the email that accompanies the loan agreement

Service – the email sent to borrowers to inform them a resource they booked has been placed into service and cannot be borrowed.

You can enter tags into your emails, which will be substituted with the appropriate text upon sending. The available tags are displayed on the page so that you can recall what they are when entering them into the email text.

Settings – SMS

SMS Setup
 To send SMS, please sign up with a local service provider that offers an 'Email to SMS' gateway. BookingPOINT will send an email to the service provider in the format cellnumber@provider.com, which will be converted into an SMS for you.

Account Email * Required field
 Provider Domain * Required field
 Message Sent As Body Subject

Mail server settings (Applies to both SMS & Email)
 SMTP * Required field
 Port 25
 Authentication Encryption None
 Username * Required field
 Password [Set](#)

Activate SMS Reminders
 Enable Overdue / Suspension SMS Notify borrowers when items are overdue and when accounts are suspended.
 Enable 'Return Reminder' SMS Notify borrowers when items are due back the next day.
 Enable 'Service' SMS Notify borrowers when their booked item is no longer available due to maintenance / service.

NOTE: This section is only applicable to BookingPOINT Deluxe when used with the built in FileMaker Server / FileMaker Server Advanced scheduler.

The **SMS** page allows you to specify the SMS account settings in order for BookingPOINT to be able to send SMS messages.

SMS Setup – In order to send SMS messages, you will need to sign up with a service provider that offers an **Email to SMS** gateway. Your service provider will supply you with a domain name, which you enter into the 'Provider Domain' field. An email will be sent to phonenumber@providerdomain.com, which will be received by the service provider and converted into an SMS.

Some service providers require the message to be sent as the email Subject whereas others require the message to be sent as the email Body. You can choose how the message will be sent using the **Message Sent As** option.

The **Account Email** field is also required. This is used so your SMS service provider can identify your messages and bill your account.

Mail server settings – allows you to specify the outbound SMTP settings so BookingPOINT can send emails. Please note these settings are shared by both Email and SMS messages.

Activate SMS Reminders – allows you to activate which reminder messages you'd like to be sent via SMS.

Settings - Web

<	>	BORROWERS	RESOURCES	BOOKINGS	IN / OUT	REPORTS	SETTINGS	
General	Office Hours	Types/Groups	Users/Security	Email	SMS	Web	Scheduler	Update/Renewal

Login Setup

Use following field as login name

Student No.

Office Hours - Displayed on Web

Monday to Thursday: 9:30am to 4:00pm
 Friday: 10:00am to 1:00pm
 Saturday & Sunday: Closed

Terms and Conditions - Displayed on Web

By pressing the Agree button, you agree to be bound by the following terms:

<Please define your usage terms here>

This section is only applicable to BookingPOINT Deluxe when used with or FileMaker Server Advanced (or FileMaker Pro for Self-Service stations when not using FileMaker Server Advanced).

Login Setup – allows you to choose which field to use as the login name for web borrowers. You can choose from Student Number, Barcode, Email or Custom. When choosing custom, the Login field on the Borrower Entry page will unlocked and editable.

Office Hours – used to display your office hours in a readable text format on the web to remind users when they log on or make a booking.

Terms and Conditions – displayed on the web when users first log in. You can use formatted text if you want to.

Settings - Scheduler



NOTE: This feature is only available in BookingPOINT Deluxe when hosted with FileMaker Server.

BookingPOINT Scheduler

Scheduling enables BookingPOINT to automate various tasks to run at specific times during the day. Schedules must be configured in FileMaker Server under the schedules menu. See your BookingPOINT documentation for further details.

Email and SMS Overdue Reminders & Suspension Notices

Last Run: 4/09/2013, 9:09 PM

Run Now

Email and SMS Tomorrow's Return Reminders

Last Run: 4/09/2013, 10:09 AM

Run Now

Attention:

Email's & SMS's wont be sent. Go to Email tab to set mail server settings.

Start

Stop

ON

This section is only applicable to BookingPOINT Deluxe when used with the built in FileMaker Server / FileMaker Server Advanced scheduler.

NOTE: Before you can use the Scheduler page within BookingPOINT, you first need to set up script schedules within FileMaker Server 12+. If you haven't already set up the script schedules please refer to the document titled '**Installing BookingPOINT Deluxe**' for more information. Also, please note, before you can send automated emails / SMS messages, you will need to configure the email settings via the **Email / SMS** tabs within the **Settings** section.

The Scheduler allows you to send automated reminder emails, overdue notices, issue demerit points, auto suspend borrowers etc.

Start / Stop buttons – allows you to turn on or off the scheduler.

Run Now buttons – allows you to run a schedule now.

Settings – Update / Renewal

Version Update
Current version: **5.0**
NOTE: You can choose which operator receives automatic reminders via Operator section on the User/Security tab.

[Check for new version](#)

Support / Maintenance Plan
Your Support and Maintenance Plan expires:
Your license key is:
NOTE: You can choose which operator receives automatic reminders via Operator section on the User/Security tab.

[Renew Support & Maintenance Plan](#)

Activate Renewal
Once you have renewed, you will need to click on the button below in order to activate the renewal.

[Activate Renewal](#)

The **Update / Renewal** tab allows you to check for new versions of BookingPOINT manually, to renew your Support and Maintenance Plan and to activate your renewal plan.

To check for updates manually, click on the **Check for new version** button. If there's a new update you will be notified. If your maintenance plan is up to date you can download the latest update package.

The expiry date of your **Support and Maintenance Plan** is shown on this page. If your plan is due to expire or has already expired you can renew your plan by clicking on the **Renew Support & Maintenance Plan** button.

Once you have renewed your Support and Maintenance Plan, you will need to activate it. Simply click on the **Activate Renewal** button.