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http://www.arcadiafund.org.uk.
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1. Introducing Inscriptio and the Administrator Interface

What is Inscriptio?
Inscriptio is a web-based application developed by the Harvard Library Lab and Harvard Library Technology Services. This application enables library users to reserve an asset, such as a carrel or hold shelf, for a specified duration. Library users can also use Inscriptio to manage and cancel their reservations of assets. Inscriptio automates an asset-reservation and management process that was previously manual.

What is the administrator interface?
The administrator interface is available only to library staff with the appropriate permissions or privileges. This interface enables the staff to set up and manage Inscriptio functionality, assets, reservations, and library users. Staff members also use the administrator interface to set up and manage what users see on the various screens of Inscriptio.

Intended audience for this guide
The intended audience for this guide consists of library staff members who use the administrator interface for managing the user interface of Inscriptio.

This guide assumes familiarity with computers and web browsers such as Internet Explorer.

Administrator Roles
The administrator interface supports two roles. The roles are based on privileges or permissions:

- A **global administrator** can set up and manage users, assets, and functionality for all libraries listed in Inscriptio. A global administrator can also set up local administrators and add libraries to Inscriptio.
- A **local administrator** can set up and manage users, assets, and functionality of a particular library. A given library staff member can have local administrator permissions for more than one library.

**Note:** Some sections in this document apply only to global administrators. A note identifies these sections. If you are a local administrator, you can skip these sections.
Requesting an administrator account

To request an administrator account, contact the Library Privileges Office:

**Location:** Widener Library Room 130

**Phone:** 617-495-4166

**Email:** widpriv@fas.harvard.edu

Related documentation

The *Inscriptio User Guide* describes how library users can reserve and manage assets.
2. Accessing and Navigating the Inscriptio Administrator Tool

Introduction

This chapter contains access information, such as how to sign in, reset a password, and sign out. This chapter also describes the Libraries (Home) screen, the navigation bar, and the User Options bar.

This chapter assumes that the Library Privileges Office has already set up permissions for you to access Inscriptio as a local or global administrator when you sign in.

Signing in

To sign in to the administrator interface:

1. Open a web browser and go to https://inscriptio.harvard.edu.

   The Sign In screen appears (Figure 2-1).

   Figure 2-1. The Sign In Screen.

   ![Image of the Sign In Screen]

2. Enter your email address and password in the fields provided on the screen and click Sign in.

   The Libraries (Home) screen of the administrator interface appears.
Libraries (Home) screen

After you sign in, the administrator interface displays the Libraries (Home) screen. The version of the Libraries (Home) screen that you depends on your administrator role: global or local.

Libraries (Home) screen — global administrators

**Note:** If you are a local administrator, you can skip this section.

Figure 2-2 shows the version of the Libraries (Home) screen for global administrators.

Figure 2-2. The Libraries (Home) Screen for Global Administrators.

[Image of the Libraries (Home) screen with annotations]

- Click a library name to edit the library's main screen.
- Click to edit the Welcome message.
- Click to edit the corresponding library's basic information.
- Click to delete the corresponding library.
- Click to add a new library.

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Actions available from the Libraries (Home) screen to global administrators

The following table lists the actions available from the Libraries (Home) screen to global administrators.

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<th>Action</th>
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<tr>
<td>Deleting a library</td>
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</tbody>
</table>

Libraries (Home) screen — local administrators

Figure 2-3 shows an example of the Libraries (Home) screen for a local administrator. In this example, the local administrator has permissions for Widener Library.

Figure 2-3. The Libraries (Home) Screen for Local Administrators.
Actions available from the Libraries (Home) screen for local administrators

The following table lists the actions available from the Libraries (Home) screen for local administrators.

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<thead>
<tr>
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Navigation bar

A black navigation bar appears below the Inscriptio logo at the top of the screen. The navigation bar shows breadcrumbs, which indicate the path of the screens that you visited to reach the current screen. Each screen name is separated by a hyphen and is a link. As a result, you can easily revisit a previous screen in your path.

For example, suppose that the administrator interface currently displays the New User screen (Figure 2-4).

Figure 2-4. Navigation Bar on a New User Screen (Top Part of the Screen Shown).

In this situation, you took the following path to reach the current screen:

1. You started on the Libraries (Home) screen and clicked Users on the User Options bar.
2. You clicked the New User button on the Users screen, and the administrator interface currently displays the screen where you define a new user as shown in Figure 2-4.
User options

The User Options bar of the administrator interface appears below the navigation bar. Each user option is a link.

The available User Options vary according to your administrator role:

- The Messages option appears only when you are a global administrator.
- The My Reservations option appears only when you are a local administrator.
- All other User Options appear for both global and local administrators. However, local administrators can use a given User Option only for the libraries where they have permissions. Global administrators can use any available User Option for any library.

Figure 2-5 and Figure 2-6 show the User Options bar for global and local administrators, respectively.

Figure 2-5. User Options Bar for Global Administrators.

Figure 2-6. User Options Bar for Local Administrators.
The following table lists each User Option of the administrator interface. This table also provides references to the sections of this document that describe each option in detail.

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<td>Reservation Notices</td>
<td>Chapter 11</td>
</tr>
<tr>
<td>Help</td>
<td>Displays information on how to use Inscriptio</td>
</tr>
</tbody>
</table>
Changing a password

To change your password:

1. Open a web browser and go to https://inscriptio.harvard.edu.
   The Sign In screen appears (Figure 2-1 on page 11).

2. On the Sign In screen, click the link **Forgot your password?**
   The Forgot Your Password or First Time User screen appears (Figure 2-7).

   **Figure 2-7. Forgot Password or First Time User Screen.**

3. Enter an email address in the field provided on the screen and click **Send me set/reset password instructions.**
   Inscriptio displays a message informing you that you will receive an email message contain instructions for resetting your password (Figure 2-8).

   **Figure 2-8. Reset Password Message.**
4. Go to your email, open the message sent by Inscriptio, and click the **Change my password** link.

Figure 2-9 shows a sample email message received from Inscriptio after requesting a password change.

**Figure 2-9. Email Sent by Inscriptio for Changing a Password.**

![Reset password instructions](image)

Inscriptio displays the Change your password screen (Figure 2-10).

**Figure 2-10. Change Your Password Screen.**

![Inscriptio Change your password](image)

5. On the Change Your Password screen, type your new password and confirmation in the fields provided and click the **Change my password** button.

Inscriptio displays the Libraries (Home) screen, which contains a message indicating that you successfully changed your password (Figure 2-11).
Figure 2-11. Password Successfully Changed Message.

Signing out
To exit from Inscriptio, click the **Sign out** link that appears at the top of any screen on the right (Figure 2-12).

Figure 2-12. Sign Out Link.

Edit account link
The **edit account** link appears on the top right of every Inscriptio screen. Click this link to display the Edit Account screen.

The contents of the Edit Account screen depend on whether you are a global administrator or a local administrator.

Figure 2-13. Edit Account Link.
**Note:** You can also edit your account by selecting **Users** from the User Options bar. When the Users screen appears, search for your name and click **Edit** to change your account settings.

**Edit Account screen — global administrators**

**Note:** If you are a local administrator, you can skip this section.

Use the Edit Account screen (Figure 2-14) to change personal information related to your global administrator account.

**Figure 2-14. Edit Account Screen — Global Administrator.**

To change settings for your global administrator account:

1. Type any changes in the **First name** and **Last name** fields.
2. Select any change to the **School affiliation** from the drop-down list.
3. Change the Email address, if needed.
4. Change the Password if needed or leave it blank for no changes.
5. Change any User Types for any library listed as needed.
6. Select or deselect Global Admin privileges as needed.

**Note:** Be careful about removing your own Global Admin privileges. If you remove these privileges and click Update User, you must get another global administrator to restore these privileges.

7. Click Update User.

The administrator interface then displays a message confirming your change.

**Edit Account screen — local administrators**

Use the Edit Account screen (Figure 2-15) to change personal information related to your local administrator account.

**Figure 2-15. Edit Account Screen — Local Administrator.**
To change settings for your local administrator account:

1. Type any changes in the **First name** and **Last name** fields.
2. Select any change to the **School affiliation** from the drop-down list.
3. Change the **Email** address, if needed.
4. Change the **Password** if needed or leave it blank for no changes.
5. Change any **User Types** in a library where you have local administrator permissions.
   
   Figure 2-15 shows an example of an Edit Account screen for a local administrator who has permissions for Widener. Therefore, only the **User Types** for Widener appear.

6. Select or deselect your **Local Admin Permissions** as needed.

   **Note:** Be careful about removing your own local administrator permissions. If you remove these permissions and click **Update User**, you must get a global administrator to reset the permissions.

7. Click **Update User**.

The administrator interface then displays a message confirming your change.
3. Managing the Libraries (Home) Screen

**Note:** If you are a local administrator, you can skip this chapter.

**Introduction**

If you are a global administrator, you can edit what Inscriptio users see on the Libraries (Home) screen. Inscriptio users arrive on the Libraries (Home) screen when they log in. They use this screen to select a library where they want to reserve an asset.

As you read this chapter, keep in mind the distinction between the Libraries (Home) screen of the Inscriptio user application and the Libraries (Home) screen of the administrator interface. In the administrator interface, the Libraries (Home) screen is where you as a global administrator set up what users see on the Libraries Home screen of the Inscriptio user application.

**Reaching the Libraries Home screen of the Administrator interface**

The starting point for the actions described in this chapter is the Libraries (Home) screen of the Inscriptio administrator interface. You reach this screen in one of the following ways:

- Sign in to Inscriptio. The Libraries (Home) screen appears as soon as you sign in.
  
  For a description of how to sign in, see page 11.

- Click the **Libraries (Home)** link from the User Options bar on any screen in the Inscriptio administrator interface.
  
  For a description of the User Options bar, see page 15.

Figure 3-1 shows the Libraries Home (screen) for a global administrator.
Actions available from the Libraries (Home) screen

The following table lists the actions available from the Libraries (Home) screen. This table also references the sections this document that describe each action.

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Editing the Welcome message

To edit the Welcome message:

1. On the Libraries (Home) screen of the administrator interface, click the Edit link that appears above the heading “Participating Libraries.”

   The administrator interface displays the Edit screen for the Welcome message.

   Figure 3-2. Edit Screen for the Welcome Message.

   ![Edit Screen for the Welcome Message]

   **WARNING:** Do not change the **Title** field. Changing this field disables Inscriptio.

2. In the editing window, change the content of the Welcome message as needed.

   To format the message, use the options in the toolbar that appears above the message window. The toolbar contains options that are commonly available in word processing applications. Hover over an option to display its function.

3. Change the **Description** field if needed. Use this field to supply an explanatory comment about the message.

4. Click **Update** to save your changes to the Welcome message.

   The administrator interface displays a confirmation message.
You can also edit the Welcome message by selecting **Messages** from the User Options bar. When the administrator interface displays the Messages screen, click the **Welcome to** link. See Chapter 14

**Adding a new library**

To add a new library:

1. On Libraries (Home) screen of the administrator interface, click **Add a New Library**.

   The administrator interface displays the New Library screen (Figure 3-3).

   **Figure 3-3. New Library Screen.**

   ![New Library Screen]

2. Fill in the fields on the screen.

   An asterisk (*) indicates a required field.

3. Add any desired content and links to the Editing windows for **Contact Info**, **Description**, and **TOS** (Terms of Service).

4. When finished editing, click **Create a Library**.

   The administrator interface displays a confirmation message on a screen where you can edit the main screen for the newly created library (Figure 3-4). The information that you supplied on the New Library screen (Figure 3-3) appears in a gray box on the left of the newly created screen (Figure 3-4).
Figure 3-4. Newly Created Library - Confirmation Message and Edit Main Library Screen.

For directions on editing the main screen for the newly created library, see Chapter 4.

Deleting a library

**Warning:** Do not delete a library. Doing so can disable Inscriptio. Although Inscriptio provides functionality for deleting a library, do not use it.

To delete a library from Inscriptio:

1. On the Libraries (Home) screen of the administrator interface, click the Delete link for the desired library under the heading "Participating Libraries."

   The administrator interface displays a warning messages asking if you are sure about deleting the library because you cannot undo the deletion.

2. Click OK.

   The administrator interface displays a confirmation message.
4. Editing a Library's Main Screen

Introduction

When library users access Inscriptio, they start by selecting a library on the Libraries (Home) screen where they want to reserve an asset. Inscriptio then displays the main screen for the selected library. This chapter describes how to set up what users see on the main screen for a library.

If you are a global administrator, you can edit the main screen for any library in Inscriptio.

If you are a local administrator, you can edit the main screen for any library where you have administrative permissions.

Available actions for editing a library's main screen

The following table lists the actions that are available for editing a library's main screen.

<table>
<thead>
<tr>
<th>Action</th>
<th>See ...</th>
</tr>
</thead>
<tbody>
<tr>
<td>Editing basic information about a library</td>
<td>Page 29</td>
</tr>
<tr>
<td>Editing information about a library's floors</td>
<td>Page 31</td>
</tr>
<tr>
<td>Changing information for a specific library floor</td>
<td>Page 32</td>
</tr>
<tr>
<td>Changing the name, call numbers, and map for a floor</td>
<td>Page 32</td>
</tr>
<tr>
<td>Adding a new library floor</td>
<td>Page 33</td>
</tr>
<tr>
<td>Changing subject area information</td>
<td>Page 34</td>
</tr>
<tr>
<td>Adding a new subject area</td>
<td>Page 34</td>
</tr>
</tbody>
</table>

Editing basic information about a library

In the user version of Inscriptio, the main screen for a library contains basic information in a gray box on the left. This gray box includes a link to general information, the library’s address, contact information, and a link to Terms of Service.

To edit the basic information about a library:

1. On Libraries (Home) screen of the administrator interface, click the Edit link for the desired library.

The following example shows the Edit link for Widener library for a local administrator (Figure 4-1).
Figure 4-1. Edit Link for Widener Library on the Libraries (Home) Screen.

The administrator interface displays the screen containing the library’s basic information. This following example shows a partial screen containing the basic information for Widener Library (Figure 4-2).

Figure 4-2. Basic Information for Widener Library.
2. Edit any desired fields on the screen.
   An asterisk (*) indicates a required field.

3. Edit any desired content and links to the Editing windows for **Contact Info**, **Description**, and **TOS** (Terms of Service).

4. When finished editing, click **Update Library**.
   The administrator interface displays a confirmation message and updates the basic information on the library’s main screen.

**Editing information about a library's floors**

To start editing information about a library’s floors, click the name of the desired library on the Libraries (Home) screen of the administrator interface. Figure 4-3 shows an example where a local administrator has permissions for Widener.

**Figure 4-3. Libraries (Home) Screen for a Local Administrator with Privileges for Widener Library.**

The administrator interface then displays the Edit Main Library screen (Figure 4-4).
Figure 4-4. Edit Main Library Screen for Widener Library.

Changing information for a specific library floor
To change information for a specific library floor, use the links in the Floors section of the Edit Main Library screen. Figure 4-5 describes these links.

Figure 4-5. Floor Links on the Edit Main Library Screen for Widener Library.

Changing the name, call numbers, and map for a floor
To change the name, call numbers, or map for a library floor, click the desired Edit link on the Edit Library Main screen (Figure 4-5). The administrator interface then displays an Update Floor screen similar to the following example (Figure 4-6).

After you make any desired changes on this screen, click Update Floor.
Adding a new library floor

To add a new library floor, click the New Floor link on the Edit Main Library screen (Figure 4-5). The administrator interface then displays a New Floor screen that is similar to the Update Floor screen (Figure 4-6).

On this New Floor screen, enter a name, select call numbers, and upload a floor map. When done, click Create Floor.
Changing subject area information

To change subject matter information, use the links in the All Subject Areas section of the Edit Main Library screen. Figure 4-7 shows and describes these links.

Figure 4-7. All Subject Area Links on the Edit Main Library Screen for Widener Library.

Note: You can also change subject-matter information for your library by clicking Subject Matter in the User Options bar. See Chapter 8

Adding a new subject area

The administrator interface provides two ways to add a new subject area:

- Scroll to the bottom of the Edit Main Library screen and click New Subject Area.
- From the User Options bar, select Subject Areas and click New Subject Area at the top of the list of subject areas for your library in the Subject Areas window.

The administrator interface then displays the New Subject area screen.
In the New Subject area window, supply a **Name** (required), a **Long Name** (optional), and **Description** (optional), and click **Create Subject Area**.

You can then edit the newly created subject area by going to one of the following locations:

- The All Subject Areas list of Edit Main Library screen (Figure 4-7)
- The **Subject Areas** screen that you reach from the User Options bar
5. Managing Users

Introduction

This chapter describes how to set up and manage accounts for individual library users.

Users screen

To start managing users, click Users in the User Options bar of the administrator interface.

The administrator interface displays the Users screen (Figure 5-1).

Figure 5-1. Users Screen (Global Administrator Version).

Actions Available from the Users Screen

The following table lists the actions available from the Users screen and references the sections of this chapter that describe each available action.

<table>
<thead>
<tr>
<th>Actions available from the Users screen</th>
<th>See ...</th>
</tr>
</thead>
<tbody>
<tr>
<td>Viewing a user's reservations</td>
<td>Page 38</td>
</tr>
<tr>
<td>Searching for a user</td>
<td>Page 39</td>
</tr>
<tr>
<td>Editing a user account</td>
<td>Page 40</td>
</tr>
<tr>
<td>Adding an individual user</td>
<td>Page 42</td>
</tr>
<tr>
<td>Exporting a list of users to a CSV file</td>
<td>Page 43</td>
</tr>
</tbody>
</table>
Global vs. local administrator versions of the Users screen

The global and local administrator versions of the User screen appears the same with one exception. Global administrators see a **Delete** link for each user, but local administrators do no see this link.

**Viewing a user's reservations**

To view a user's reservations, click the user's email address on the Users screen (Figure 5-1) or search results (Figure 5-3).

The administrator interface displays the All Reservations screen, which lists the assets that the user has reserved. Figure 5-2 shows an example of a user's reservations.

**Figure 5-2. All Reservations Screen for a User.**

For each asset, the All Reservations screen contains the following information.

<table>
<thead>
<tr>
<th>Field</th>
<th>Description</th>
<th>See ...</th>
</tr>
</thead>
<tbody>
<tr>
<td>ID</td>
<td>Links to a screen which shows details about a specific reservation, such as the start date, end date, and status.</td>
<td><strong>Viewing details for a specific reservation</strong> on page 78</td>
</tr>
<tr>
<td>Asset/Slot</td>
<td>Links to the Asset screen, which contains descriptive information, such as the asset's maximum and minimum reservation times and the number of available seats,</td>
<td><strong>Viewing asset details</strong> on page 79</td>
</tr>
<tr>
<td>Field</td>
<td>Description</td>
<td>See ...</td>
</tr>
<tr>
<td>------------------------------</td>
<td>-----------------------------------------------------------</td>
<td>----------------------------------------------</td>
</tr>
<tr>
<td>User name and email address</td>
<td>Links to the user's Edit Account screen.</td>
<td>Editing a user account on page 40</td>
</tr>
<tr>
<td>Clear or Approve links</td>
<td>Links that enable you to Clear or Approve the reservation based on its status</td>
<td>Approving and clearing reservations on page 81</td>
</tr>
</tbody>
</table>

**Searching for a user**

To search for a user, enter the search strings separated by spaces in the **Filter** field of the Users screen (Figure 5-1). The administrator uses the strings to perform an “AND” search.

Some examples of searches are:

- `<Firstname> <Lastname>`
- `<Lastname> <Firstname>`
- `<Lastname> <emailprovider>`

The administrator interface displays the results of the search below the **Filter** field as you type the search strings (Figure 5-3).

**Figure 5-3. Example: a Global Administrator's Search for a User.**
Editing a user account

To edit a user's account information, click the Edit link that appears in one of the following locations on the Users screen:

- Next to a user's email address on the Users screen (Figure 5-1)
- In the search results (Figure 5-3)

The administrator interface then displays the Edit Account screen. The following example shows an Edit Account screen that a global administrator sees (Figure 5-4).

Figure 5-4. Example of an Edit Account Screen That a Global Administrator Sees.

The Edit Account screen for a user is similar to your personal Edit Account screen, which you access by clicking the link at the top of any screen. See pages 20 and 21 for a description of a personal Edit Account screen.
To make changes on the Edit Account screen:

1. Type any changes in the First name and Last name fields.
2. Select any change to the School affiliation from the drop-down list.
3. Change the Email address, if needed.
4. Change the Password if needed or leave it blank for no changes.
5. Change the User Types for any library listed as needed.
   
   The available User Types depend on your administrator permissions:
   
   - If you are a global administrator you can view and change the User Types lists for all libraries.
   - If you are a local administrator, you change view and change the User Types only for the library where you have privileges.

6. Change the Local Admin Permissions as needed.
   
   The Local Admin Permissions that you can grant depend on your own privileges:
   
   - Global administrators can grant Local Admin Permissions for any library.
   - Local administrators can grant Local Admin Permissions for a library where the granting local administrator has privileges. For example, a local administrator for Widener can grant other users Local Admin Permissions only for Widener.

7. Select or deselect Global Admin privileges.
   
   Only global administrators can grant Global Admin privileges to other users.

8. Click Update User.

The administrator interface displays a message confirming your change.
Adding an individual user

To add an individual new user:

1. Click **New User** on the Users screen (Figure 5-5).

   ![Image](image.png)

   **Figure 5-5. New User Button on the Users Screen.**

   The administrator interface displays the Edit account screen (Figure 5-4).

2. Follow the steps on page 41 to fill in the Edit account screen.

3. When done, click **Create User**.

   The administrator interface displays the confirmation message in the format:

   **Added <New user's email address>**
Exporting a list of users to a CSV file

The administrator interface enables you to export a list of users to a comma-separated value (CSV) file. You can then open the file in a spreadsheet application to sort and rearrange it. For example, you can sort the list alphabetically last name.

To export a list of users:

1. On the Users screen, click the link Export Users to CSV.

Figure 5-6. Export Users to CSV Link.

The administrator interface displays a confirmation message and a link to download the CSV file.

Figure 5-7. Confirmation Message and Link to Download the CSV File.
2. Click **Download CSV** to open the file.

The following example shows an example of a CSV file opened in a spreadsheet application (Figure 5-8). This example contains placeholders for the email address, first names, and last names.

**Figure 5-8. CSV File of Library Users Opened in a Spreadsheet Application.**

<table>
<thead>
<tr>
<th></th>
<th>A</th>
<th>B</th>
<th>C</th>
<th>D</th>
<th>E</th>
</tr>
</thead>
<tbody>
<tr>
<td>1</td>
<td>13 14 15</td>
<td>1 <a href="mailto:xxx@domain_name.com">xxx@domain_name.com</a></td>
<td>&lt;first_name&gt;</td>
<td>&lt;last_name&gt;</td>
<td></td>
</tr>
<tr>
<td>2</td>
<td>13 14 15</td>
<td>1 <a href="mailto:xxx@domain_name.com">xxx@domain_name.com</a></td>
<td>&lt;first_name&gt;</td>
<td>&lt;last_name&gt;</td>
<td></td>
</tr>
<tr>
<td>3</td>
<td>19 20 21</td>
<td>1 <a href="mailto:xxx@domain_name.com">xxx@domain_name.com</a></td>
<td>&lt;first_name&gt;</td>
<td>&lt;last_name&gt;</td>
<td></td>
</tr>
<tr>
<td>4</td>
<td>16 17 18</td>
<td>10 <a href="mailto:xxx@domain_name.com">xxx@domain_name.com</a></td>
<td>&lt;first_name&gt;</td>
<td>&lt;last_name&gt;</td>
<td></td>
</tr>
<tr>
<td>5</td>
<td>16 17 18</td>
<td>1 <a href="mailto:xxx@domain_name.com">xxx@domain_name.com</a></td>
<td>&lt;first_name&gt;</td>
<td>&lt;last_name&gt;</td>
<td></td>
</tr>
<tr>
<td>6</td>
<td>13 14 15</td>
<td>1 <a href="mailto:xxx@domain_name.com">xxx@domain_name.com</a></td>
<td>&lt;first_name&gt;</td>
<td>&lt;last_name&gt;</td>
<td></td>
</tr>
<tr>
<td>7</td>
<td>16 17 18</td>
<td>1 <a href="mailto:xxx@domain_name.com">xxx@domain_name.com</a></td>
<td>&lt;first_name&gt;</td>
<td>&lt;last_name&gt;</td>
<td></td>
</tr>
<tr>
<td>8</td>
<td>19 20 21</td>
<td>1 <a href="mailto:xxx@domain_name.com">xxx@domain_name.com</a></td>
<td>&lt;first_name&gt;</td>
<td>&lt;last_name&gt;</td>
<td></td>
</tr>
<tr>
<td>9</td>
<td>19 20 21</td>
<td>1 <a href="mailto:xxx@domain_name.com">xxx@domain_name.com</a></td>
<td>&lt;first_name&gt;</td>
<td>&lt;last_name&gt;</td>
<td></td>
</tr>
</tbody>
</table>

For an explanation of the fields of a CSV or corresponding columns of a CSV in a spreadsheet, expand **Batch Upload** on the Users screen.
Creating multiple new users (batch upload)

The administrator interface enables you to upload a CSV file to create several or many new users at the same time. Uploading a CSV file is more convenient than editing a screen for each new user.

To create an upload file of new users:

1. On the Users screen, expand **Batch Upload**.

   ![Batch Upload Section of the Users Screen](image)

2. Follow the directions provided on the screen to create and format the CSV file of new users.

   **Note:** When creating a CSV, see the following:
   - For a list of values for the **user_type id** field, go to the User Types screen from the User Options bar.
   - For a list of values for the **school_affiliation id** field, go to the School Affiliations screen from the User Options bar.

3. Click **Browse** to navigate to the location of the CSV file.
4. Click **Upload** to create the new users.

   The administrator interface displays a confirmation message.
Deleting a user — global administrators

**Note:** If you are local administrator, you can skip this section

**Warning:** Do not delete a user. Although Inscriptio provides this functionality, do no use it.

Only global administrators can delete users.

To delete a user:

1. On the Users screen, search for the user that you want to delete.
   The administrator interface displays the search results.
   
   **Figure 5-10. Delete Link for a User.**

   ![Delete Link for a User](image)

2. Click the **Delete** link.
   
   The administrator interface displays a confirmation message asking you if you are sure about deleting the user.

3. Click **Yes** in response to the message
   
   The administrator interface deletes the user and refreshes the screen. The deleted user no longer appears.
6. Managing User Types

Introduction
This chapter describes how to manage user types. A user type indicates someone’s status at the university. Typical examples are Faculty/Officer, Graduate Student, and Undergraduate in Senior year.

What is the purpose of a user type?
A library’s policy determines who can reserve an asset, and User Types help library staff determine eligibility when confirming reservations. For example, Widener’s policy allows only senior undergraduate students, graduate students, faculty/officers, and research assistants to reserve carrels.

How does someone assign or change a user type?
You assign a user type on the Edit Account screen when you set up or change a user’s information. For details, see the section Editing a user account on page 40.

You can change your own user type by clicking the edit account link that appears at the top of any screen. For details see the sections, Edit Account screen — global administrators on page 20 and Edit Account screen — local administrators on page 21.

When you use a CSV file to create multiple users, you specify a <user type id> in the first field or column for each row representing a user. For details, see the section Creating multiple new users (batch upload) on page 45.
User Types screen

To manage user types, click User Types in the User Options bar of the administrator interface.

The administrator interface displays the User Options screen (Figure 6-1).

Figure 6-1. User Types Screen (Global Administrator Version).

User type ID numbers

Each user type has a system-assigned ID number. For example, the Faculty/Officer user type for Widener has ID 14.

You use the ID number when creating a CSV file containing multiple new users. See the section Creating multiple new users (batch upload) on page 45.
Actions available from the User Types screen

The following table lists the actions available from the User Types screen. This table also references the sections of this chapter that describe each action.

<table>
<thead>
<tr>
<th>Action</th>
<th>See ...</th>
</tr>
</thead>
<tbody>
<tr>
<td>Editing a user type</td>
<td>Page 49</td>
</tr>
<tr>
<td>Creating a user type</td>
<td>Page 50</td>
</tr>
<tr>
<td>Deleting a user type</td>
<td>Page 52</td>
</tr>
</tbody>
</table>

Global vs. local administrator versions of the User Types screen

The differences between the global administrator and local administrator versions of the User Types screen are:

- The global administrator version lists the User Types for all libraries and provides **Edit** and **Delete** links for each User Type.
- The local administrator version lists the User Types for all libraries, but displays the **Edit** and **Delete** links only for the libraries where you have administrator privileges.

For example, if you have local administrator privileges for Widener, the User Types screen only displays **Edit** and **Delete** links for the user types for Widener.

Editing a user type

To edit a user type, click the corresponding **Edit** link on the User Types screen (Figure 6-1).

The administrator interface then displays the Edit User Type screen (Figure 6-2),

**Figure 6-2. Edit User Type Screen.**

Make any needed changes to the Name field and click **Update User type**.
The administrator interface displays the following confirmation message at the top of the User Types screen (Figure 6-3).

**Figure 6-3. User Type Change Confirmation.**

Creating a user type

To create a new user type:

1. On the User Types screen, click **New User Type** (Figure 6-4).

**Figure 6-4. New User Type Button on the User Types Screen.**
The administrator interface displays the New User Type screen (Figure 6-5).

Figure 6-5. New User Type Screen.

![New User Type Screen](image)

2. Fill in the Name field and click Create User Type.

The administrator interface displays a confirmation message (Figure 6-6).

Figure 6-6. Confirmation Message After Creating a New User Type.

![Confirmation Message](image)
Deleting a user type
To delete a user type:

1. On the User Types screen, click the **Delete** link for the desired user type (Figure 6-7).

   **Figure 6-7. Example of a Delete Link (Circled) for a User Type.**

   ![Image](image1.png)

   The administrator interface displays a message asking you if you are sure about deleting the user type (Figure 6-8).

   **Figure 6-8. Prompt for Deleting a User Type.**

   ![Image](image2.png)

2. Click **OK** in response to the message.

   The administrator interface deletes the user type and displays a confirmation message (Figure 6-9).

   **Figure 6-9. Confirmation Message for Deleting a User Type.**

   ![Image](image3.png)
7. Managing School Affiliations

Introduction
This chapter describes how to manage the list of available school affiliations.

Where you specify a School Affiliation in the administrator interface
The field School Affiliation appears as a drop-down list on the following screens:

- Edit Account screen — global administrators 20. See page 20
- Edit Account screen — local administrators 21. See page 21
- Edit Account screen for a library user. See page 40.

You also specify a school affiliation by using an ID number when creating multiple new users in a batch upload. See page 45.

School Affiliations screen
To manage School Affiliations, click the corresponding selection in the User Options bar of the administrator interface.

The administrator interface then displays the School Affiliations screen (Figure 7-1).

Figure 7-1. School Affiliations Screen.
School affiliation ID numbers

Each school affiliation has a system-assigned ID number. For example, FAS has ID 1.

You use the ID number to specify a school affiliation when creating a CSV file containing multiple new users. See the section Creating multiple new users (batch upload) on page 45

Actions available from the School Affiliations screen

The following table list the actions that are available from the Messages screen. This table also references the sections that describe each available action.

<table>
<thead>
<tr>
<th>Actions available from the Messages screen</th>
<th>See ...</th>
</tr>
</thead>
<tbody>
<tr>
<td>Editing a school affiliation</td>
<td>Page 54</td>
</tr>
<tr>
<td>Creating a new school affiliation</td>
<td>Page 55</td>
</tr>
<tr>
<td>Deleting a school affiliation</td>
<td>Page 56</td>
</tr>
</tbody>
</table>

Editing a school affiliation

To edit a school affiliation

1. Click the corresponding Edit link on the School Affiliation screen (Figure 7-1).

   The administrator interface displays the Update School Affiliation screen (Figure 7-2).

   Figure 7-2. Update School Affiliations Screen.

2. Change the Name and click Update School Affiliation.

   The administrator interface displays a confirmation message (Figure 7-3).
Figure 7-3. Confirmation of an Updated School Affiliation.

Creating a new school affiliation

To edit a school affiliation:

1. Click the **New School Affiliation** link on the School Affiliation screen (Figure 7-1).
   
   The administrator interface displays the Create School Affiliation screen (Figure 7-4).

   **Figure 7-4. Create School Affiliations Screen.**

2. Enter a **Name** and click **Update School Affiliation**.

   The administrator interface refreshes School Affiliations screen with a confirmation message and the newly created affiliation (Figure 7-5).
Deleting a school affiliation

To delete a school affiliation

1. Click the corresponding **Delete** link on the School Affiliation screen (Figure 7-1).
   
The administrator interface displays a message asking if you are sure about the deletion because you cannot undo it.

2. Click **OK** to confirm the deletion.
   
The administrator interface displays a confirmation message (Figure 7-6).
Figure 7-6. Confirmation after Deleting a School Affiliation.
8. Managing Subject Areas

Introduction

This chapter describes how to manage subject areas.

Subject Areas screen

To start, click Subject Areas in the User Options bar of the administrator interface.

The administrator interface displays the Subject Areas screen (Figure 8-1).

Figure 8-1. Subject Areas Screen (Local Administrator Version).
Actions available from the Subject Areas screen

The following table lists the actions available from the Subject Areas screen. This table also references the sections that describe each action.

<table>
<thead>
<tr>
<th>Action</th>
<th>See ...</th>
</tr>
</thead>
<tbody>
<tr>
<td>Viewing a subject area</td>
<td>Page 61</td>
</tr>
<tr>
<td>Editing information about a subject area</td>
<td>Page 62</td>
</tr>
<tr>
<td>Editing call numbers associated with a subject area</td>
<td>Page 63</td>
</tr>
<tr>
<td>Adding a new subject area to a library</td>
<td>Page 52</td>
</tr>
<tr>
<td>Deleting a subject area from a library</td>
<td>Page 66</td>
</tr>
</tbody>
</table>

Global vs. local administrator versions of the Subject Areas screen

The differences between the global administrator and local administrator versions of the Subject Areas screen are:

- Global administrators can add new subject areas and edit and delete existing subject areas in all libraries.
- Local administrators can add new subject areas and edit and delete existing subject areas only in libraries where they have permissions. Local administrators can view the subject area for any other library.

For example, if you have local administrator privileges for Widener, the Subject Areas screen displays the New Subject Area and Edit and Delete links for the subject areas only in Widener. The subject area links for all libraries other than Widener are read only.
Viewing a subject area

To view a particular subject area, click the corresponding name on the Subject Area screen.

For example, under Widener Library on the Subject Areas screen, click **History — British Isles** (Figure 8-2).

**Figure 8-2. Selecting a Subject Area to View.**

The administrator interface then displays the screen for the selected subject area (Figure 8-3).

**Figure 8-3. Subject Area Screen.**
From the screen for a particular subject area (Figure 8-3), click the link to display a screen showing a map of the library floor containing materials in the selected subject area. Inscriptio users select an asset to reserve from this screen.

**Editing information about a subject area**

You can edit the **Name**, **Long Name**, and **Description** of a subject area.

To change this information for a subject area:

1. Click the **Edit** link for the desired subject area on the Subject Areas screen (Figure 8-4).

![Figure 8-4. Selecting an Edit Link on the Subject Areas Screen.](image)

The administrator interface displays the Edit Subject Area screen (Figure 8-5).

![Figure 8-5. Edit Subject Screen.](image)

2. Make any desired changes on this screen and click **Update Subject Area**.

The administrator refreshes the Subject Areas screen and displays a confirmation message at the top of the screen.
Editing call numbers associated with a subject area

To edit call numbers associated with a subject area:

1. Click the **Call Numbers** link for the desired subject area on the Subject Areas screen (Figure 8-6).

![Figure 8-6. Call Numbers Link for a Subject Area.](image)

The administrator interface displays the Call Numbers screen for the selected subject area (Figure 8-7).

![Figure 8-7. Edit Call Numbers Screen.](image)

2. Follow the directions in the next section to make any desired changes to call numbers associated with a subject area.
Editing information about an existing call number associated with a subject area

To change information about an existing call number:

1. Click the **Edit** link for the desired call number of the Edit Call Numbers screen (Figure 8-7).

   The administrator interface displays the Edit Screen for a Specific Call Number (Figure 8-8).

   **Figure 8-8. Edit Screen for a Specific Call Number.**

   ![Edit Screen for a Specific Call Number](image)

2. Make any desired changes and click **Update Call Number**.

   The administrator interface displays a confirmation message.

Deleting a call number associated with a subject area

To delete a call number associated with a subject area, click the desired **Delete** link on the Edit Call Numbers screen (Figure 8-8).

The administrator interface then deletes the call number and displays a confirmation message.
Adding a new subject area to a library

To add a new subject area to a library:

1. Click the **New Subject Area** link for the desired subject area on the Subject Areas screen (Figure 8-9).

   Figure 8-9. New Subject Area Link on the Subject Areas Screen.

   ![New Subject Area Link](image)

   The administrator interface displays the New Subject Area screen (Figure 8-10).

   Figure 8-10. New Subject Area Screen.

   ![New Subject Area Screen](image)

2. Fill in the **Name** field (required) and add a **Long name** and **Description**, if desired, and click **Create Subject Area**.

   The administrator refreshes the Subject Areas screen with the newly added subject area and displays a confirmation message at the top of the screen.
Deleting a subject area from a library

To delete a subject area from a library:

1. Click the **Delete** link for the desired subject area on the Subject Areas screen (Figure 8-11).

   **Figure 8-11. Delete Link on the Subject Areas Screen.**

   ![Delete Link on Subject Areas Screen]

   The administrator interface displays a prompt asking if you are sure about the deletion because you cannot undo it.

2. Click **OK**.

   The administrator interface removes the subject area and refreshes the Subject Areas screen with a confirmation message at the top of the screen.
9. Managing Call Numbers

Introduction

This chapter describes how to manage call numbers.

Call Numbers screen

To start, click Call Numbers in the User Options bar of the administrator interface.

The administrator interface displays the Call Numbers screen (Figure 9-1).

Figure 9-1. Call Numbers Screen (Local Administrator Version).
Actions available from the Call Numbers screen

The following table lists the actions available from the Call Numbers screen. This table also references the sections that describe each action.

<table>
<thead>
<tr>
<th>Action</th>
<th>See ...</th>
</tr>
</thead>
<tbody>
<tr>
<td>Displaying the subject area associated with a call number</td>
<td>Page 69</td>
</tr>
<tr>
<td>Editing an existing call number</td>
<td>Page 71</td>
</tr>
<tr>
<td>Adding a new call number to a library</td>
<td>Page 72</td>
</tr>
<tr>
<td>Deleting a call number from a library</td>
<td>Page 73</td>
</tr>
</tbody>
</table>

Global vs. local administrator versions of the Call Numbers screen

The differences between the global administrator and local administrator versions of the Call Numbers screen are:

- Global administrators can add new call numbers and edit and delete existing call numbers in all libraries.
- Local administrators can add new call numbers and edit and delete existing call numbers only in libraries where they have permissions. Local administrators can view the call numbers for any other library.

For example, if you have local administrator privileges for Widener, the Call Numbers screen displays the New Call Number and Edit and Delete links for the call numbers only in Widener. The call number links for all libraries other than Widener are read only.
Displaying the subject area associated with a call number

To view the subject area associated with a call number:

1. Click the corresponding call number on the Call Numbers screen.
   For example, under Widener Library on the Call Numbers screen, click **WID-LC DA** (Figure 9-2).

   **Figure 9-2. Selecting a Call Number to View Its Associated Subject Area.**

   ![Image](image.jpg)

   The administrator interface displays the screen containing information for the selected call number (Figure 9-3)

   **Figure 9-3. Screen Containing Information for the Selected Call Number.**

   ![Image](image.jpg)

   2. Click the link for the for the subject area.

   The administrator interface displays the screen for the selected subject area (Figure 9-4).
Figure 9-4. Subject Area Screen.

3. From the screen for the selected subject area (Figure 9-4), click the link for the library floor.

   The administrator interfaces displays a screen showing a map of the library floor containing materials in the selected subject area. Inscriptio users select an asset to reserve from this screen.
Editing an existing call number

To edit an existing call number:

1. Click the Edit link for the desired call number on the Call Numbers screen (Figure 9-5).

![Figure 9-5. Edit Link for a Call Number.]

The administrator interface displays the Edit Screen for a Specific Call Number (Figure 9-6).

![Figure 9-6. Edit Screen for a Specific Call Number.]

2. Make any desired changes and click Update Call Number.

The administrator interface displays a confirmation message.
Adding a new call number to a library

To add a new call number to a library:

1. Click the **New Call Number** link (Figure 9-7).

   **Figure 9-7. New Call Number Link on the Call Numbers Screen.**

   ![New Call Number Link on the Call Numbers Screen](image)

   The administrator interface displays the New Call Number screen (Figure 9-8).

   **Figure 9-8. New Call Number Screen.**

   ![New Call Number Screen](image)

2. Fill in the required fields, **Call Number** and **Subject area**, and any desired optional fields.

3. When done, click **Create Call number**.

   The administrator interface refreshes the Call Numbers screen with the newly added call number and displays a confirmation message at the top of the screen.
Deleting a call number from a library

To delete a call number from a library:

1. Click the Delete link for the desired call number on the Call Numbers screen (Figure 9-9).

   ![Figure 9-9. Delete Link on the Call Numbers Screen.]

   The administrator interface displays a prompt asking if you are sure about the deletion.

2. Click OK.

   The administrator interface removes the call number and refreshes the Call Numbers screen with a confirmation message at the top of the screen.
10. Managing Reservations

Introduction
This chapter describes how to manage reservations.

Reservation screen
To start, click Reservations in the User Options bar of the administrator interface.

The administrator interface then displays the Reservations screen (Figure 10-1).

Figure 10-1. Reservations Screen (Global Administrator Version).

The Reservations screen shows expandable lists of reservations for each library.
**Actions available from the Reservations screen**

The following table lists the actions available from the Reservation screen. This table also references the sections that describe each action.

<table>
<thead>
<tr>
<th>Action</th>
<th>See ...</th>
</tr>
</thead>
<tbody>
<tr>
<td>Viewing and hiding reservation lists</td>
<td>Page 76</td>
</tr>
<tr>
<td>Viewing details about reservations and reserved assets</td>
<td>Page 77</td>
</tr>
<tr>
<td>Approving and clearing reservations</td>
<td>Page 81</td>
</tr>
</tbody>
</table>

**Global vs. local administrator versions of the Reservations screen**

The differences between the global administrator and local administrator versions of the Reservations screen are:

- Global administrators can see and change reservations in all libraries.
- Local administrators can see and change reservations only in libraries where they have permissions.

**Viewing and hiding reservation lists**

To toggle between viewing and hiding a particular reservation list, click the + symbol that precedes the title of each list. When the administrator interface first displays the Reservations screen, all lists are hidden.

For example, Figure 10-1 shows one pending carrel reservation for Widener. When you click the +, the administrator interface displays the screen shown in Figure 10-2.

**Figure 10-2. Expanded Reservation List (Global Administrator Version).**
Viewing details about reservations and reserved assets

This section describes details about viewing reservations and reserved assets.

Format of a reservation record

An individual reservation record (as shown in Figure 10-2) has the following fields.

<table>
<thead>
<tr>
<th>Field</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td>ID</td>
<td>A unique identifier for a specific reservation. Links to a screen containing details about the reservation. See Figure 10-3 on page 78.</td>
</tr>
<tr>
<td>Asset/Slot</td>
<td>Links to a screen that provides details about the reserved asset. See Figure 10-4 on page 79.</td>
</tr>
<tr>
<td>User (Email address)</td>
<td>Links to a screen showing all reservations that the user made. See Figure 10-7 on page 81.</td>
</tr>
<tr>
<td>Date range</td>
<td>Indicates the duration of the reservation.</td>
</tr>
<tr>
<td>Approve, Clear</td>
<td>The available actions depend on the status of the reservation:</td>
</tr>
<tr>
<td></td>
<td><strong>Clear</strong> - remove the reservation from the list.</td>
</tr>
<tr>
<td></td>
<td><strong>Approve</strong> - confirm a reservation.</td>
</tr>
<tr>
<td></td>
<td>For an explanation of clearing, approving, and related statuses, see the table on page 81.</td>
</tr>
</tbody>
</table>
Viewing details for a specific reservation

When you click the ID field in a reservation record, the administrator interface displays a screen showing details about the specific reservation (Figure 10-3).

Most fields on this screen are self-explanatory, but note the following fields:

- **User Filter**

  This field enables you to enter a search string, such as a last name, to locate a library user's email address quickly. As you type, the administrator interface displays a list of matching email addresses. When you see the desired email address in the list, click it to fill in the User field with this address.

- **End date**

  When you review and approve a reservation, check the length of the user's appointment in the Harvard ID system against the End date listed in the reservation. Most users choose the maximum of 540 days. Adjust the End date in the reservation so that it does not go beyond the length of the user's appointment.

*Figure 10-3. Screen Showing Details for a Specific Reservation.*

Make any desired changes on this screen and click **Update Reservation**.
Viewing asset details

When you click the Asset/Slot field in a reservation, the administrator interface displays the Asset Details screen (Figure 10-4). This example shows a pending reservation for the selected asset that you can approve or clear.

Figure 10-4. Asset Details Screen.
Reserving an asset of behalf of a user

When you view the Asset Details screen, you can reserve this asset on behalf of a library user.

To reserve an asset:

1. From the Assets Details screen (Figure 10-4), click **Reserve This Asset**.

   The administrator interface displays the New Reservation screen (Figure 10-5). This screen contains the same field as the screen that provides details about an existing reservation (Figure 10-3 on page 78).

   **Figure 10-5. New Reservation Screen.**

   ![New Reservation Screen](image)

   2. Fill in the fields on the New Reservation screen and click **Create Reservation**.

   The administrator interface displays a confirmation message (Figure 10-6).

   **Figure 10-6. Confirmation Message for a New Reservation.**

   ![Confirmation Message](image)
Viewing the list of a user's reservations

When you click the user’s email address in a reservation record, the administrator interface displays a screen listing the user's reservations (Figure 10-7). This example shows one reservation that you can approve or clear.

Figure 10-7. Reservation for a User

![Reservation Screen](Image)

Approving and clearing reservations

Depending on a reservation’s status, the record for an individual reservation record can contain the Approve and Delete links. The following table lists the available reservation statuses and the links that appear for a reservation in each status.

<table>
<thead>
<tr>
<th>Status</th>
<th>Approve Link</th>
<th>Clear Link</th>
</tr>
</thead>
<tbody>
<tr>
<td>Approved</td>
<td>Does not appear</td>
<td>Appears</td>
</tr>
<tr>
<td>Expired</td>
<td>Does not appear</td>
<td>Appears</td>
</tr>
<tr>
<td>Pending</td>
<td>Appears</td>
<td>Appears</td>
</tr>
<tr>
<td>Renewal</td>
<td>Appears</td>
<td>Appears</td>
</tr>
</tbody>
</table>

A change in status can generate an email notification to the user. For details, see Chapter 13, "Managing Reservation Notices."
11. Updating Reservation Notices

Introduction
This chapter describes how to update reservation notices. A reservation notice is an email message that a library user receives when a certain event occurs, such as an approval of a reservation or impending expiration of an asset reservation.

Reservation Notices screen
To start, click Reservation Notices in the User Options bar of the administrator interface.

The administrator interface then displays the Reservation Notices screen (Figure 11-1).

Figure 11-1. Reservations Notices Screen (Global Administrator Version).

The Reservations screen shows expandable lists of reservations notices for each library.

Actions available from the Reservation Notices screen
The following table lists the actions available from the Reservation Notices screen. This table also references the sections that describe each action.

<table>
<thead>
<tr>
<th>Action</th>
<th>See ...</th>
</tr>
</thead>
<tbody>
<tr>
<td>Viewing and hiding reservation notices</td>
<td>Page 84</td>
</tr>
<tr>
<td>Editing a reservation notice</td>
<td>Page 85</td>
</tr>
</tbody>
</table>
Global vs. local administrator versions of the Reservation Notices screen

The differences between the global administrator and local administrator versions of the Reservation Notices screen are:

- Global administrators can see and change reservation notices in all libraries.
- Local administrators can see and change reservation notices only in libraries where they have permissions.

Viewing and hiding reservation notices

To toggle between viewing and hiding a particular list of reservation notices, click the + symbol that precedes the title of each list. When the administrator interface first displays the Reservation Notices screen, all lists are hidden.

For example, Figure 11-2 shows the expanded list carrel reservation notices for Pusey.

Figure 11-2. Expanded Reservation Notices List (Global Administrator Version).

Note: Be careful about clicking Reset Notices. This link removes the text from all notices, and they become blank.
Editing a reservation notice

To edit a reservation notice:

1. On the Reservation Notices screen, expand the list for the desired library and click the **Edit** link for the message that you want to change (Figure 11-2 on page 84).

   The administrator interface displays an edit window for the selected reservation notice (Figure 11-3). This window displays a toolbar containing formatting and editing options and icons commonly found in word processing applications.

   **Figure 11-3. Example of an Edit Screen for a Reservation Notice.**

   ![Figure 11-3](image)

   Toolbar of editing and formatting options

2. Change any desired text and formatting of the message.

3. When done, click **Update Reservation Notice**.

   The administrator interface displays a confirmation message (Figure 11-4).

   **Figure 11-4. Confirmation After Updating a Reservation Notice.**

   ![Figure 11-4](image)
12. Managing Asset Types and Reservable Assets

Introduction
This chapter describes how to manage asset types and reservable assets.

Reservable Assets screen
To start, click Reservable Assets in the User Options bar of the administrator interface.
The administrator interface displays the Reservable Assets screen (Figure 12-1).

Figure 12-1. Users Screen (Global Administrator Version).
Actions Available from the Reservable Assets Screen

The following table lists the actions available from the Reservable Assets screen. This table also references the sections that describe each available action.

<table>
<thead>
<tr>
<th>Actions available from the Reservable Assets screen</th>
<th>See ...</th>
</tr>
</thead>
<tbody>
<tr>
<td>Viewing and hiding lists of reservable assets</td>
<td>Page 88</td>
</tr>
<tr>
<td>Updating information about a reservable asset type</td>
<td>Page 89</td>
</tr>
<tr>
<td>Adding a new reservable asset type</td>
<td>Page 91</td>
</tr>
<tr>
<td>Deleting a reservable asset type</td>
<td>Page 92</td>
</tr>
<tr>
<td>Viewing links for asset details</td>
<td>Page 93</td>
</tr>
<tr>
<td>Updating information about an asset</td>
<td>Page 94</td>
</tr>
<tr>
<td>Creating a new asset</td>
<td>Page 95</td>
</tr>
<tr>
<td>Deleting an asset</td>
<td>Page 96</td>
</tr>
<tr>
<td>Adding multiple new assets (batch upload)</td>
<td>Page 97</td>
</tr>
</tbody>
</table>

Global vs. local administrator versions of the Reservable Assets screen

The Reservable Assets screen enables you to manage assets and asset types, send email messages to all users in a library, and upload a group of assets in batch mode.

- Global administrators can perform the actions available from this screen for all libraries.
- Local administrators can perform the actions available from this screen only for the libraries where they have permissions.

Viewing and hiding lists of reservable assets

To toggle between viewing and hiding a list of reservable assets, click the corresponding + symbol. When the administrator interface first displays the Reservable Assets screen, all expandable lists and actions are hidden.

For example, Figure 12-2 shows the Hold Shelves list for Pusey after clicking the + to expand the list.
Updating information about a reservable asset type

To update information about a reservable asset type:

1. On the Reservable Assets screen, click the Edit link for the desired asset type.

   For example, suppose that you want to change information for hold shelves in Pusey (Figure 12-3).

   Figure 12-3. Selecting the Edit Link for an Asset Type.

   The administrator interface displays the Update Reservable Asset Type screen (Figure 12-4). An asterisk on this screen indicates a required field.
2. Make any desired changes on this screen and click Update Reservable Asset Type.

The administrator interface displays a confirmation message (Figure 12-5).

Figure 12-5. Confirmation after Updating a Reservable Asset Type.
Adding a new reservable asset type

To add a new reservable asset type to a library:

1. On the Reservable Assets screen, click **New Reservable Asset Type** (Figure 12-6).

   ![Figure 12-6. Link for Adding a New Reservable Asset Type.]

   The administrator interface displays the New Reservable Asset Type screen, which contains the same fields as the Update Reservable Asset Type screen Figure 12-4 on page 89). An asterisk indicates a required field.

2. On the New Reservable Asset Type screen, enter all required fields and any desired optional fields and click **Create Reservable asset type**.

   The administrator interface displays a confirmation message (Figure 12-7).

   ![Figure 12-7. Confirmation Message After Adding a New Reservable Asset Type.]

   91
Deleting a reservable asset type

To delete a reservable asset type from a library:

1. On the Reservable Assets screen, select the **Delete** link for the asset type that you want to delete.
   For example, suppose that you want to delete Reserve Shelves in Pusey (Figure 12-8).

   **Figure 12-8. Link for Deleting a Reservable Asset Type.**

   ![Reservable Assets Screen](image)

   The administrator interface displays a warning message indicating that you cannot undo the delete action.

2. Click OK to confirm the deletion.
   The administrator interface displays a confirmation message (Figure 12-9).

   **Figure 12-9. Confirmation Message After Deleting a Reservable Asset Type.**

   ![Confirmation Message](image)
Viewing links for asset details

To view details about a particular asset, expand the list for the desired asset type on the Reservable Assets screen as shown in the following example (Figure 12-10).

Figure 12-10. Links to Asset Details.

When you click the link for the desired asset, the administrator interface displays the corresponding Asset Details screen.

You can also reach the Asset Details screen when displaying a reservation. See the sections:

- Viewing asset details on page 79
- Reserving an asset of behalf of a user on page 80
Updating information about an asset

To update information about an asset:

1. Expand the list for the desired asset type and click the **Edit** link for the desired asset (Figure 12-11).

   **Figure 12-11. Link for Editing Asset Details.**

   ![Image showing Reservable Assets interface]

The administrator interface displays Update Reservable Asset screen for the desired asset (Figure 12-12).

**Figure 12-12. Update Reservable Asset Screen.**
2. Make any desired changes on this screen and click **Update Reservable Asset**.

The administrator interface displays the updated Asset Details screen with a confirmation message at the top of the screen (Figure 12-13).

**Figure 12-13.** Confirmation Message after Updating Asset Details.

---

**Creating a new asset**

**Note:** This section describes how to add a single new asset. To add a group of assets, see **Adding multiple new assets (batch upload)** on page 97.

To add a new reservable asset to a library:

1. Click the appropriate **Add New <Asset Type>** link.

   For example, suppose that you want to add a new carrel to Pusey (Figure 12-14). Click the **Add New Carrel** link for this library.

**Figure 12-14.** Link for Adding a New Asset.
The administrator interface displays the Create Reservable Asset screen, which contains the same fields as the Update Reservable Asset screen (Figure 12-12 on page 94).

2. On the Create Reservable Asset screen, enter all required fields marked by an asterisk and any desired optional fields and click **Create Reservable Asset**.

   The administrator interface displays a confirmation message (Figure 12-15).

**Figure 12-15. Confirmation Message After Adding a New Reservable Asset Type.**

---

### Deleting an asset

To delete an asset:

1. On the Reservable Assets screen, expand the list containing the desired asset and click the **Delete** link.

**Figure 12-16. Delete Link for an Asset.**

---

The administrator interface displays a warning message indicating that you cannot undo the deletion.
2. Click **OK**.

   The administrator interface removes the asset from the Reservable Assets screen.

**Adding multiple new assets (batch upload)**

The administrator interface enables you to upload a CSV file to create multiple new assets at the same time. Uploading a CSV file is more convenient than editing a screen for each new asset.

To upload a CSV file of new assets:

1. On the Reservable Assets screen, prepare a CSV file according to the format described in the **Batch Upload** section.

   If you use a spreadsheet application to create the file, make sure to save it in CSV format.

   **Figure 12-17. Batch Upload Section of the Reservable Assets Screen.**

2. Click **Browse** to navigate to the location of the CSV file.

3. Click **Upload** to create the new assets.

   The administrator interface displays a confirmation message.
Emailing all users in a library

The administrator interface enables you to broadcast a message to all users in a given library.

To send an email message to all library users:

1. On the Reservable Assets screen, expand the Email All in Library link for the desired library.
   
The administrator interface displays an edit window for the email message.

   Figure 12-18. Email All Users in a Library.

2. Type the text of the message and click Send

   The administrator interface sends the message.
13. Viewing Your Reservations

**Note:** If you are a global administrator, you can skip this chapter.

**Introduction**

If you are a local administrator, you can view a list of your reservations.

**My Reservations screen**

To start, click **Reservations** in the User Options bar of the administrator interface.

The administrator interface displays the My Reservations screen (Figure 13-1).

**Figure 13-1. My Reservations Screen.**

![Inscriptio](image)

This screen lists reservations according to status as Pending, Approved, Expired, and Renewal. Figure 13-1 shows a record for one approved reservation.

**Format of a reservation record**

An individual reservation record has the following fields.

<table>
<thead>
<tr>
<th>Field</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td>ID</td>
<td>A unique identifier for a specific reservation. Links to a screen containing details about the reservation. See Figure 10-3 on page 78.</td>
</tr>
<tr>
<td>Asset/Slot</td>
<td>Links to a screen that provides details about the reserved asset. See Figure 10-4 on page 79.</td>
</tr>
<tr>
<td>Field</td>
<td>Description</td>
</tr>
<tr>
<td>---------------</td>
<td>-----------------------------------------------------------------------------</td>
</tr>
<tr>
<td><strong>User</strong> <em>(Email address)</em></td>
<td>Links to a screen showing all reservations that the user made. See Figure 10-7 on page 81.</td>
</tr>
<tr>
<td><strong>Date range</strong></td>
<td>Indicates the duration of the reservation.</td>
</tr>
</tbody>
</table>
14. Managing Messages

Note: If you are a local administrator, you can skip this chapter.

Introduction
This chapter describes how to manage the messages that users see on various screens of Inscriptio. Examples are:

- The Welcome message that appears on the Libraries (Home) screen
- The Thanks message that appears at the bottom of Inscriptio screens

Messages screen
To start, click Messages in the User Options bar of the administrator interface.

The administrator interface displays the Messages screen (Figure 14-1).

Figure 14-1. Messages Screen.
Actions available from the Messages screen

The following table lists the actions that are available from the Messages screen. This table also references the sections that describe each available action.

<table>
<thead>
<tr>
<th>Actions available from the Messages screen</th>
<th>See ...</th>
</tr>
</thead>
<tbody>
<tr>
<td>Viewing a message</td>
<td>Page 102</td>
</tr>
<tr>
<td>Editing a message</td>
<td>Page 102</td>
</tr>
<tr>
<td>Adding a new message</td>
<td>Page 103</td>
</tr>
</tbody>
</table>

Viewing a message

To view a message, click the corresponding name on the Messages screen (Figure 14-1 on page 101).

Editing a message

To edit a message:

1. On the Messages screen, click the Edit link for the message that you want to change.

   The administrator interface displays an edit window for the selected message (Figure 14-2).

   Figure 14-2. Example of an Edit Screen for a Message.

   ![Edit Screen for a Message]

   Toolbar containing editing and formatting options.

   WARNING: Do not change the Title field. Changing this field disables Inscriptio.
2. In the editing window, change the content of the message as needed.
   
   To format the message, use the options in the toolbar that appears above the message window. The toolbar contains options that are commonly available in word processing applications. Hover over an option to displays its function.

3. Change the Description field, if needed. Use this field to supply an explanatory comment about the message.

4. Click Update Message to save your changes.
   
   The administrator interface displays a confirmation message (Figure 14-3).

**Figure 14-3. Confirmation After Updating a Message.**

You can also edit the Welcome message from the Libraries (Home)screen. See the section Editing the Welcome message on page 25.

**Adding a new message**

To add a new message:

1. On the Messages screen (Figure 14-1 on page 101), click New Message.
   
   The administrator interface displays an edit screen for the new message. This screen contains the same fields as the screen for editing an existing message (Figure 14-2 on page 102).

2. Enter the text of the message and format it.

3. When done, click Create Message.
   
   The administrator interface displays a confirmation message.
15. Viewing Reports

Introduction
The administrator interface provides two types of reports:

- Active assets per library
- Asset reservations per library and user type

This chapter describes how to download and view these reports.

Reporting and Stats screen
To start, click Reports in the User Options bar of the administrator interface.

The administrator interface displays the Reporting and Stats screen ().

Figure 15-1. Reporting and Stats Screen.

The Reporting and Stats screen is the same for global and local administrators.
Downloading and viewing a report

To download and view a report:

1. On the Reporting and Stats screen, click the **Start date** and **End date** fields for the desired report to specify a range.
2. Click the **Download Report** button for the desired report.
3. Navigate to the location on your computer where you stored the report to open it.

Active assets per library

Figure 15-2 shows an example of report for active assets per library from July 1, 2014 through July 31, 2014. This report shows 6 active carrels for Pusey and 144 for Widener during the specified time.

![Figure 15-2. Active Assets per Library.](image)

<table>
<thead>
<tr>
<th></th>
<th>A</th>
<th>B</th>
<th>C</th>
</tr>
</thead>
<tbody>
<tr>
<td>1</td>
<td>library_name,</td>
<td>rat_name,</td>
<td>active_carrels</td>
</tr>
<tr>
<td>2</td>
<td>Pusey Library</td>
<td>Carrel</td>
<td>6</td>
</tr>
<tr>
<td>3</td>
<td>Widener Library</td>
<td>Carrel</td>
<td>144</td>
</tr>
</tbody>
</table>

Active assets per user type and library

Figure 15-3 shows an example of report for active assets per user type and library from July 1, 2014 through July 31, 2014.

Each line of the report lists a specific user type, a library name, and the active number of assets for the listed user type and library during the specified time. For example, according to line 1, Pusey Library had six active reservations for the Faculty/Officer user type from July 1, 2014 through July 31, 2014.
Figure 15-3. Active Assets per User Type and Library.

<table>
<thead>
<tr>
<th></th>
<th>user_type</th>
<th>l_name</th>
<th>active_res</th>
</tr>
</thead>
<tbody>
<tr>
<td>1</td>
<td>Faculty/Officer</td>
<td>Pusey Library</td>
<td>6</td>
</tr>
<tr>
<td>2</td>
<td>Faculty/Officer</td>
<td>Pusey Library</td>
<td>123</td>
</tr>
<tr>
<td>3</td>
<td>Graduate Student</td>
<td>Pusey Library</td>
<td>12</td>
</tr>
<tr>
<td>4</td>
<td>Graduate Student</td>
<td>Widener Library</td>
<td>410</td>
</tr>
<tr>
<td>5</td>
<td>HCL Special Borrower</td>
<td>Pusey Library</td>
<td>30</td>
</tr>
<tr>
<td>6</td>
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<td>Widener Library</td>
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A. Selecting and Deselecting Multiple Items in Lists

How to select and deselect multiple items from lists

The method for making multiple selections and deselecting multiple items is dependent on your computer and operating system.

- PCs running Windows: Hold down the Ctrl key and click the items.
- Macintosh: Hold down the Command key and click the items.

Where lists occur

The User Types and Local Admin Permissions allow multiple selections from lists. See the following table.

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B. “Drawing” an asset on a floor map

As a global admin, you can “draw” a rectangle on a floor map, and associate it with an asset. The rectangle will be green if there are any reservable slots; once reserves have been made, it is represented in red.

To start, be sure that the asset that you want to “draw” has already been defined (see Adding a new reservable asset type).

Click on the Libraries (home) in the User Options bar of the administrator interface.

Select your library, and the appropriate floor.

The interface will display the appropriate floor map.

Figure B-1. Portion of the floor map

Place your cursor over a corner of the area you want to associate with an asset.
Figure B-2. Portion of the floor map; the cursor is a “cross” in a corner of the area

Holding the Left mouse button down, pull your mouse to the diagonal corner. As you draw, the space turns green. Let go of the mouse button when you’ve reached the corner.

Figure B-3. Portion of the floor map; the drawn rectangle is green.

Place your cursor somewhere over the newly-created green rectangle. Note that the cursor shape changes.
B-4. Portion of the floor map; the cursor shape changes over a green area

Press down on the Left mouse button; you will see a pop-up for asset selection, plus buttons for refining your drawn area.

B-5. Portion of the floor map; the asset assignment pop-up

You may use the arrow buttons to move your drawn area one pixel at a time; the minus and plus buttons allow you to decrease or increase the length and width of your drawn area, also one pixel at a time.

To assign an asset, select the asset from the Asset: drop-down selector. Then click on the Apply button.
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