

## How to Cancel or Edit Study Room or Meeting Room Reservations

### CANCELLING RESERVATIONS

This is the preferred starting point for **cancelling** reservations:

- communicate to the patron that you are happy to cancel their reservation but with our new system, they are able to **cancel** their reservation from the approval email they received when they made the reservation
- the email is sent from [calendar@johnstonlibrary.org](mailto:calendar@johnstonlibrary.org)

#### Why do I have to start here?

Because we can empower the public to take advantage of features of our new calendar system by teaching these steps.

What if patron doesn't remember receiving a confirmation email or otherwise has no idea how to find it or can't find it in their email inbox? Or they just need to modify their reservation?

Log in to the new calendar to **cancel or edit** the reservation for them

1. Open your computer's desktop and click on the **Google Chrome** icon



#### Why do I have to switch browsers?

The physical act of opening a new browser tells your brain you're doing something different, i.e. you are logging into the calendar as staff and now have permissions to perform functions only staff can do, not patrons.

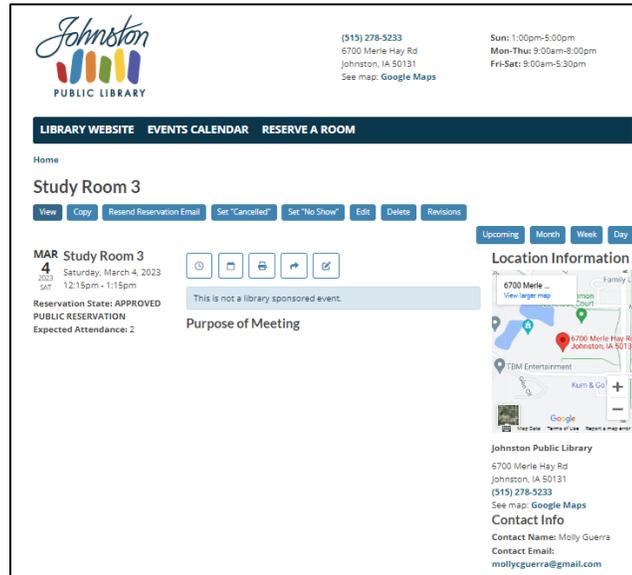
#### Why does this matter?

Staff logins do not have the same "guardrails" in place as the public side of the calendar. For instance, under staff logins the system does not prevent us from reserving rooms beyond the 90 day limit imposed on patrons. In short, *our process is the safeguard.*

- The browser should automatically open the **Log in** page of the new calendar and the login credentials of **username=circulation** and **password=123Johnston** should populate these fields, click Log in. Note: the calendar may already be logged in from a previous user on the same day.

- Click on the **Events Calendar** tab or you may already be on this page

4. **Search** for the reservation in question and click on the **Title**. The reservation is now displayed in **View mode**.

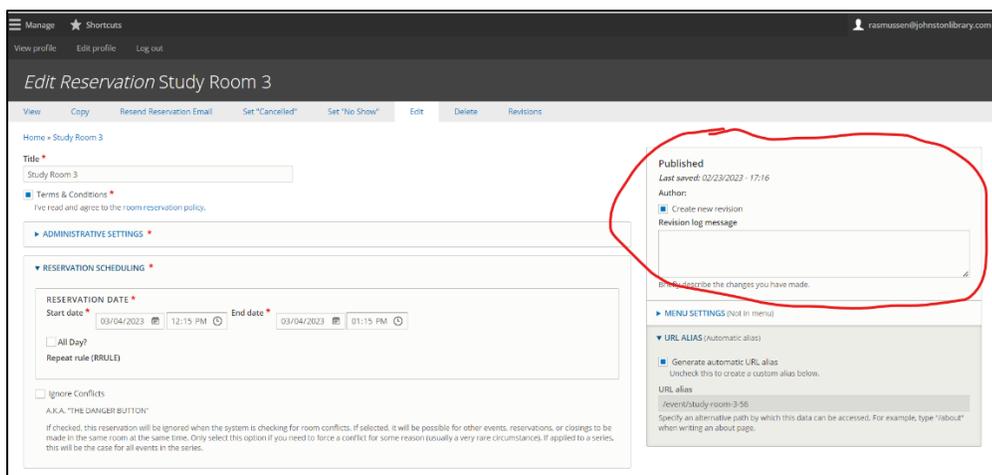


**5. IMPORTANT! click on the Edit button first!!!!**

**Why?**

Following this process will create a revision history that staff can rely on if questions arise regarding the reservation. If we don't follow these steps, we lose the "paper trail" so to speak.

6. Immediately look on the right-hand side of the webpage and find the section labeled **Published**



7. In the **Revision log message** section, briefly describe the changes you have made. Make sure to identify the name of the person you spoke with and if the interaction was on the phone or in-person. Include a reason for the change if appropriate. Enter the date and your name or initials.

8. Turn your attention to the left-side of the webpage to the **Administrative Settings** section. Click on the > arrow to expand this section,

9. Click on the drop down arrow next to the **Reservation State** field to view available options. Select cancelled.

10. Scroll to the bottom of the page and click the **Submit** button. **Nothing is saved until you hit Submit.** Patrons will receive a cancellation email.

11. **Close** your Google browser. **Read the next page.**

12. If an individual needs to reschedule a study or meeting room for a **new date**, make sure you are **Logged Out**, i.e. using the Firefox Browser, when placing the reservation so our calendar “guardrails” are in place. When you are logged out, study room reservations will automatically approve so long as the individual doesn’t have more than one reservation during a week and meeting room requests will be set to pending so staff can review them for policy compliance.

**You're not done yet!**

**Open Slack** and post a message in the #meeting-rooms channel, indicate the name and date of the room reservation you cancelled.

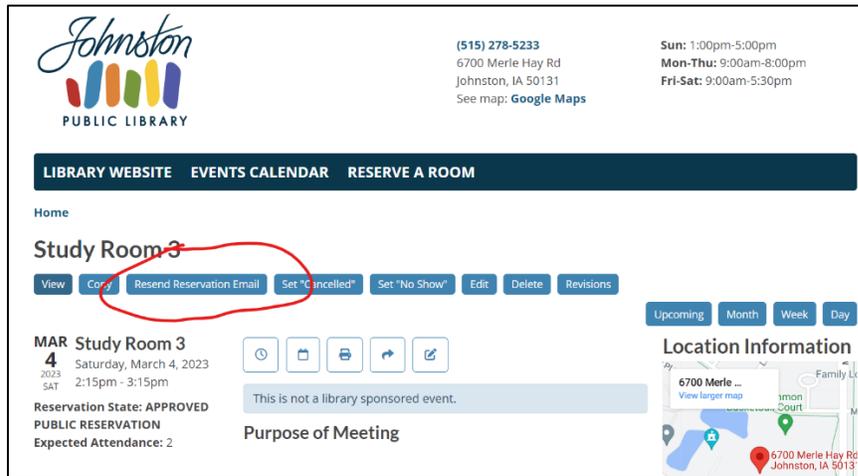
Why do I have to make a post in Slack?

Public Services prints meeting room slips. If a meeting room reservation is changed or cancelled, we need to review the slip and reprint it or mark as cancelled. Our goal is to keep both Circulation and Public Services "in the loop" and eliminate questions later. `

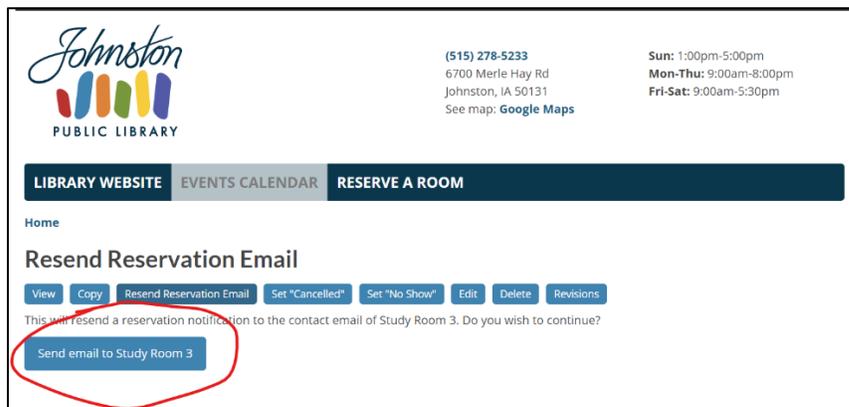
## EDITING RESERVATIONS

Editing makes sense when you are changing information for the reservation without changing the date, e.g. adding additional time or information like technology required or special requests

1. If you decide to edit a reservation, follow the steps above for recording changes in the revision log, but **don't** cancel the reservation. Instead, make note of the changes you are making and why; then make the needed changes and hit **Submit**.
2. Click on **Resend Reservation Email**



3. Click on the "send email to \_\_" button



4. **Close** your Google browser.

You're not done yet!

**Open Slack** and post a message in the #meeting-rooms channel, indicate the name and date of the room reservation you edited and what changed.

Why do I have to make a post in Slack?

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