Booking Spaces for Scheduled Appointments with Patrons (Fall 2020)

Guidelines for conducting scheduled appointments with patrons in shared Library spaces are as follows:

Mode
- For the health and safety of library employees and patrons, remote research assistance is preferred and strongly encouraged wherever possible.
- In-person consultations should only be conducted when there is a specific need that cannot be met remotely and should be infrequent.
- All patron contacts should be recorded on the appropriate Desk Tracker form to enable accurate assessment mid-semester.
- There will be no walk-up research services; walk-up patrons should be directed to book appointments by contacting the appropriate unit/library/specialist.

Method
- Space bookings must be booked by library employees, patrons will not be allowed to book appointment spaces directly.
- If a unit cannot accommodate a request for an in-person appointment, they should reach out through their division to find someone to assist based on the subject specialty and/or material type. If no one from the division is able to meet with the patron, they can send a request for assistance through the Ask a Librarian email (reflib@library.illinois.edu).
- Units should establish consultation spaces in the Springshare LibCal/Spaces module for each individual space that will be available for consultations (step-by-step instructions included below).
  - For the Main Library, these spaces should be established under the “Main Library – Spaces for Appointments” location in LibCal/Spaces, which will help communicate when patrons are to be expected in the Marshall Gallery, and where they will be going.

Space Use
- We recommend a minimum of one (1) business day prior notice for booking spaces (i.e., no same-day bookings); individual units may set different requirements based on availability of spaces and staffing.
- Avoid booking back-to-back appointments in the same space. Each consultation space should remain un-booked for a minimum of 30 minutes after a consultation to allow for adequate cleaning time and time to escort patrons from the building.
- Patrons will be admitted to building entry areas no sooner than 10 minutes before a scheduled appointment; some patrons may be asked to wait outside if socially distant indoor waiting spaces are at capacity.
- If the library employee who has booked the appointment does not arrive on time, patrons will be asked to leave indoor waiting spaces 10 minutes after appointments are scheduled to start to make room for the next patron.
- Library employees are required to ensure unit and shared consultation spaces are cleaned after each use, following guidelines recommended by Library Facilities.
- Keys for the shared spaces in the Main Library can be signed out and picked up from room 230 Monday-Friday 9-3pm. If Lucretia is not in the office during those hours, Kaci will be in 246E and can get the key needed from room 230. The bookable rooms are available until 5 p.m. at the moment. Anyone having an appointment after 3 p.m. should pick up the key before 3 and return it the following morning.
Safety

- Appointments must follow Campus, Library, and CDC guidelines for health and safety, including PPE use. Anyone setting up an appointment **MUST** communicate this to the patron when booking the appointment. We suggest including the following language in your communication with patrons with whom you are scheduling an in-person appointment:
  - All in-person appointments will observe CDC social distancing guidelines and PPE requirements, include clean-up of spaces before and after consultations, and be conducted in accordance with space capacity restrictions. Patrons must demonstrate that building access permission has been granted by campus before being permitted access to Library buildings or spaces. When you come to the Library for your appointment, you will be asked to present your “Building Access Granted” status on the Safer Illinois app or via the boarding pass option.

- No patrons may be in Library spaces unescorted; library employees **MUST** remain with patrons throughout each researcher’s visit.

- Each building will have a pre-approved meeting space for entry and exit; library employees must meet patrons in these spaces, and escort them to the exit at the conclusion of each consultation.
  - When using appointment spaces in the Main Library, library employees will meet patrons in the Marshall Gallery and escort them to the appointment space; do not use any other entrances to the building, for entry or exit. Only patrons who have an appointment that can verified through LibCal/Spaces will be admitted to the building.

- Please read through the [Campus guidance on handling non-compliance](#) to review the provided scenarios on what to do if someone is not wearing a face covering, as required under campus policy.

- Library employees will not be expected to enforce the removal of individuals. Guidance is being on who to contact when people do not comply with the policy. This document will be updated as this information becomes available.

- Members of the campus community can report COVID-19 enforcement violations at [https://go.illinois.edu/COVID19-report](https://go.illinois.edu/COVID19-report).

Instructions for setting up spaces in LibCal

Someone from the unit should have an account in LibCal or an account can be made using a unit’s resource email (for new accounts, please contact rmt@library.illinois.edu).

Log in to the U of I LibApps portal at: [https://illinois.libapps.com/libapps/login.php](https://illinois.libapps.com/libapps/login.php) - on the landing page you will see any of the LibApps modules that you have an account in. You can either click on LibCal and Spaces from that list or use the dropdown LibApps menu to choose LibCal.
From the main LibCal page, use the Admin pulldown menu to choose Spaces & Equipment.

For Spaces in the Main Library

The url for booking spaces in the Main Library is: https://uiuc.libcal.com/reserve/main_appointmentspaces. This is for use by Library employees only – please do not give this out to patrons.

To add your space to this list, from the list of locations on the Manage Spaces & Equipment page, navigate to the listing for Main Library – Spaces for Appointments and click on the link in the Spaces / Seats column.
On the Spaces & Categories page, click on Add New Space.

In the Add Space dialog box, enter a name for your space and use the dropdown menu next to Category to choose Appointment Spaces (leave the Zone dropdown as is). Choosing the Appointment Spaces category is important as it will ensure that appointments in your spaces will be grouped with the others in the Main Library building for simple view and export by those working in the Marshall Gallery entry point. This category also has settings integrated such as customized booking form questions and confirmation email message. Click Save & Continue.
On the Edit Space page, enter the appropriate number for your space in the Current Capacity and Maximum Capacity boxes then click on the Save Settings button at the bottom of the page.

Click on the Details tab and enter a short description of your space. Click on the Save Settings button at the bottom of the page then click on Back to Spaces & Categories at the top of the page.
If you do not set hours for your space, the booking calendar will show the default hours that are set for the Main Library – Appointment Spaces location. To see these hours, click on the Hours tab.

On the hours page, hover your cursor on the eye icon next to Main Library Appointments – Fall to see hours set for the location. To add specific hours for your space bookings, click on Add Hours For Item/Space and follow the steps in the Add Hours section of this document.

For Spaces outside of the Main Library

If there is not currently a location listed for your library, on the Manage Spaces & Equipment page, click on Add New Location.
In the Add Location dialog box, enter the name for your location. Click Save & Continue.

On the Location page, choose the Private access setting. Click Save Location Settings, then click on Spaces & Categories.

If your library already has a location in LibCal, from the Manage Spaces & Equipment page, click on the Edit Location icon in the Action column.

On the Location page, click on Spaces & Categories.
Adding a new space to your location:

If your location does not yet have any spaces, you will need to add a category first. If your location does have existing spaces, you may want to add a category for appointment spaces for purposes of organization. To do that, click on Add New Category.

Enter a name for the category and click Save & Continue.

Change the Access level to Private.

We have set up a booking form that asks for the basic information needed for appointments with patrons (name, email, unit, and phone number of library employee booking the appointment as well as the name of the patron). If that is appropriate for your purposes, you can choose it – Appointment Spaces – Fall 2020 – from the dropdown list. Click on Save Category Settings.
If you want to set up your own form, you can find step-by-step instructions in SpringShare’s help article on booking forms.

Once you have a category, to add a new space, on the Spaces & Categories page, click on Add New Space.

In the Add Space dialog box, enter a name for your space and use the dropdown menu next to Category to choose the category you have created for appointment spaces (leave the Zone dropdown as is unless you have implemented zones in your location). Click Save & Continue.
On the Edit Space page, enter the appropriate number for your space in the Current Capacity and Maximum Capacity boxes then click on the Save Settings button at the bottom of the page.

Click on the Details tab and enter a short description of your space. Click on the Save Settings button at the bottom of the page then click on Back to Spaces & Categories at the top of the page.

In the Main Library we’ve customized the booking confirmation message to include a reminder to pass along the safety requirements for entry to Library buildings to the patron (first bullet point under “Safety” at the top of this document). To incorporate this into your confirmation message, click on the settings wheel icon at the corner of your spaces list and choose Edit Category.
On the Edit Category page, click on Email Templates.

Click on the > next to the template for Confirmed/Mediated Tentative/Verified to open the text box. You may also want to add the same text to the template for the Reminder message.

Paste the text into the box and click the Save button.

Exit the Edit Categories page by clicking on Back to Spaces & Categories. From the Spaces & Categories page, click on Email Templates.
Click on the > next to the email templates that correspond to the ones you added text to in the prior step in the Edit Category page. In these templates, look for the {{{CATEGORY}}} tag. If it’s there already, you can move it around to the place that makes most sense to include the safety information (we put it right at the top, after the greeting). If the tag is not there you can add it in at the chosen spot.

Click the Save button.

If you do not set hours for your space, the booking calendar will show the default hours that are set for the location. To see these hours, click on the Hours tab and hover your cursor over the eye icon in the Opening Hours section. Hours also may be linked to opening hours set in LibCal for your library. You can find these under Hours in the Admin dropdown menu.

Adding hours for your space:
In order to add hours for your space, you will need to have an hours template set up to use for this purpose. You can see the details of existing templates by clicking on the Hours Templates tab from the Manage Spaces & Equipment page. If you do not have an appropriate hours template, you can set one (or more) up by following the step-by-step instructions in the [SpringShare hours template set up guide](#).
Once you find or create an appropriate hours template, in the Hours tab for your Location, click on Add Hours For Item/Space.

In the Enable Non-Location Hours dialog box, choose your space from the dropdown list and click Save.

An additional box will appear on the Hours page for your space. To add hours, click on Add Date Range.
In the Add Date Range dialog box, enter a date range (likely the Fall semester dates) and choose the appropriate template from the dropdown list. Click the Add Date Range button to save.

**Viewing and Linking to the Booking Calendar for your Space**

To view the booking calendar for your space, from the Spaces & Categories tab for your location, click on the eye icon in the Action column for your space.

You can then copy the url from that page and use it for booking.

There are many other things that can be set in LibCal/Spaces. We have outlined the basics we’ve identified as necessary to set up a space for appointments. If you would like to go further with customization for your space, we recommend you consult the [extensive LibCal documentation](#) via Springshare’s help site.