BLUEcloud BookMyne
Training Guide
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Training Overview

Intended Audience

This guide is intended for those users who will configure BookMyne.

Prerequisite

BLUEcloud Central is a prerequisite to this guide.

Goals

After completing this guide and/or the corresponding course, staff will know how to:

- Setup BookMyne
- Navigate the end user application
- Setup Bookmyne Admin accounts

Getting Connected

Access information to your particular BookMyne application will not be provided during training. Your Site Administrator should receive the following information from your SirsiDynix Project Manager or from a Client Care representative:

- URL to access BLUEcloud Central
- Delivered Administrator login and password

If you are the Site Administrator, change the administrator password as soon as you receive it. If you are not the Site Administrator, you may need to wait for users to be created and access rights to be assigned before accessing BookMyne.
BookMyne Overview

The BookMyne app enables patron access to the library’s catalog in order to search, place holds, renew checked out material, and review his/her account with ease from their phones. This guide will discuss the setup and configuration of the policies necessary to set up BookMyne. This guide assumes you have already configured the policies within the BLUEcloud Central tool. However, if you are not familiar with this process, see the BLUEcloud Central guide for more information on setting up these policies.

In the screenshot below, you can see that only two policies are required to set up BookMyne, “Search Policy” and “My Account Settings”. However, many other policies are available to improve your library’s ability to report, as well as the end user’s experience. These policies include Buy It Now, Commerce Policy, Enriched Content Settings, Library Information Display, Library Messages Policy, Suggested Reading, Symphony Pickup Locations, Symphony Station Policy, and HIP Profile.

**NOTE:** Symphony Station Policy and HIP Profile are not BLUEcloud policies. They refer to the library system’s ILS policies or profiles.

This guide will review the setup for BookMyne profiles. Policies used in more than one BLUEcloud product are covered in the BLUEcloud Central guide.
BookMyne Administration

BookMyne Profile Creation

After having created or modified the policies necessary for the setup of BookMyne (BLUEcloud Central policies: Buy It Now, Commerce, Enriched Content, Library Information Display, Library Messages, My Account, Suggested Reading, and Symphony Pickup Locations), those policies need to be linked to the BookMyne profile that will be used by the BookMyne app. The BookMyne profiles are managed within the Admin menu > Products > Bookmyne > Profiles

The Profiles screen will list all the BookMyne profiles that are owned by the institution you have selected within the institution tree.

If you need to edit an existing BookMyne profile, select it and you will be able to access the options already assigned to the profile.

If you will be creating a new profile, click the “Create Profile” button.

You will see the following screen.
Remember the only two policies you need to create a BookMyne profile are “Search Policy” and “My Account Policy”. If you are already using other BLUEcloud products many of the policies used in BookMyne may already exist. However, you can learn about all of these policies in the BLUEcloud Central Training Guide. When you are done filling in the fields for this profile, click “Create”.

**Profile Name** - This is the name of the policy you will be creating.

**Owner** – This is the institution that will own the BookMyne profile. Select the appropriate institution from the dropdown menu.

*NOTE: The dropdown menu will only show the institution selected on the Institution Context and, if the institution selected has any children institutions, all those as well.*
**Used by** - This option has two buttons to choose from: Owner and Descendants and Institution Group. If you choose Owner and Descendants, this BookMyne profile will be able to be used by the institution selected on the Owner box as well as by any institution that belongs to the owning institution.

![Used by](image)

If you choose the Institution Group option, then this BookMyne profile will be able to be used by any institution belonging to the group that you will select from the dropdown.

**Search Policy** - The search policy radio buttons specify whether to use BLUEcloud or Web Services based searches for BookMyne. Once BLUEcloud Search or Web Services search has been selected, the search policy drop-down will be populated with options depending on your institution’s configuration. For BLUEcloud Search, the drop-down will be populated with BLUEcloud search policies. For Symphony systems the drop-down will be populated with search libraries. For Horizon systems, the drop-down will be populated with Horizon Information Portal profiles. The value from this drop-down determines the source of searches for your BookMyne users.

If you select a BLUEcloud Search policy, you will include results from your ILS catalog and eResource Central (if your library has eRC enabled). If you select a Web Services policy, you will only show results from your Symphony or Horizon catalog.

**Buy It Now** – Select the Buy It Now policy that should be used for this BookMyne profile (if any).

**Commerce Policy** – Select the Commerce policy that should be used for this BookMyne profile (if any).

**Enriched Content Settings** - Select the Enriched Content policy that will be used for this BookMyne profile (if any).
Library Information Display – Select the policy that will be used for this BookMyne profile, in order to display library details, such as hours, address and phone number (if any).

Library Messages Policy – Select the policy that will be used for this BookMyne profile (if any), in order to display library messages to patrons.

My Account Settings – Define which My Account settings to use for this BookMyne app.

Suggested Reading – Specifies the suggested reading list to display in the BookMyne app.

Symphony Pickup Locations – (Symphony only) Select the appropriate holds pickup locations policy for this profile.

Symphony Station Policy - Specifies which, if any, station policy to use for this BookMyne profile. Setting a station policy will allow for better reporting in Symphony. This field is for Symphony ILS only.

HIP Profile – Specifies which HIP profile will be used for this BookMyne profile. This is for Horizon ILS only.

Symphony Web Services Client ID - This is only available for systems using Web Services 4.0 or higher. This field would be filled in with the ID entered in your Web Services.
Publishing to BookMyne

Once you have created the BookMyne profiles for your library system, you need to add them to the BookMyne app. Adding a BookMyne profile to the BookMyne app is done in Admin Menu > Products > BookMyne > BookMyne.

Select BookMyne>General Settings. You will then see the profiles that have been added to the app.

If you need to add a profile to the BookMyne app, click “Add”.

The available BookMyne profiles will display. If you don’t see the profile you want to add to the BookMyne App, you can Search the profile’s name using the Search box. You may select all profiles at once, by checking the “Profile Name” box. After you have selected the desired profiles, click “Save”. 
Removing a Profiles from the App

To delete a profile from the BookMyne App, select it from the list and click “X”.

![Add Profile Window](image)

![General Settings](image)
Policy Configuration

The Search Policies, Buy It Now, Commerce, Enriched Content, Library Information Display, Library Messages, My Account, Suggested Reading, and Symphony Pickup Locations are all covered in depth in the BLUEcloud Central guide and course. These policies are universal policies that are utilized by multiple products. However, the two policies outlined below are specific to your library system (Horizon or Symphony).

**Symphony Station Policy**

The Symphony Station Policy field reflects existing named stations in your Symphony system. In Symphony, named stations allow you to track transactions that occurred on designated workstations. In the case of Bookmyne, you can use this type of policy to track renewals and holds placed by your patrons within Bookmyne.

If you are not already familiar with the Station Policy wizard, see the Symphony Administration training guide.
**HIP Profile**

The HIP Profile field enables you to select the Horizon Information Portal profile to use for this listing. This defines the default search limit, login credentials, displayed patron information and available library locations for searching.

This list is generated from the existing profiles defined in the Horizon Information Portal administration tool. If you want to use a Discovery Server for searching, you must still specify a value here to be used for login credentials and displaying patron information.

Be sure to specify a profile that matches the value you selected for the Location field so that the user can search and place holds without problems.

**Institution Configuration**

While institutions are covered in the BLUEcloud Central Training guide, BookMyne will not function if the institution(s) are not configured properly. Each institution must have the correct web services URL for BookMyne to function. It is also important to have the correct coordinates for each library, to enable BookMyne users to find your library using locational searches and add your library to their device. The general information fields are useful for general contact information you wish to make available to your patrons using the Library Information Display policies.
BookMyne End User

Before your patrons can use the BookMyne app, they need to search and set up their home library. After having set up what institution their account belongs to, they will be able to browse, place holds, and renew material they have checked out.

NOTE: Placing holds and renewing material will depend on the library system’s policies.

Finding a Library

When a user first opens the BookMyne app, he/she will see the option to find a library.

To find a library

1. Click Find Library.

2. Choose to search for Nearby libraries (uses the devices location services), or, choose to search by Name.

3. A list of all the libraries that match the search will appear. Select the appropriate library.

4. Click Add This Library.
Once the user has defined a library, this screen will appear:

**Change Library**

The “Change Library” option enables users to add and remove libraries.
Search

The “Search” option enables users to search your library’s holdings.

Once one or more items have been selected from the list, the option to place a hold will appear. Project Gutenberg items will present a button to download, whether your library made them available through your ILS or eResource Central. All items loaded via eResource Central (excluding Project Gutenberg) will present a checkout button.
If multiple pickup locations are available, the user can select the desired pickup location. The option to save this selection as the default is also available. After saving your selection, a confirmation will appear with the option to place the hold, or cancel.

A green check mark will indicated that the hold was successfully placed.

To return to the search screen, click the left-facing arrow.

To return to the home screen, click the home icon.
Users

The “Change User” option enables users to enter their library access information, for features such as placing holds and “My Account”. You may have multiple user accounts set up in BookMyne. To add a new user to the BookMyne app, click “Add user”. This will prompt you to log in with your library credentials.

If you would like to change the user, select it from the list of users you have already added to the BookMyne app.

If you would like to remove a user from the list of users, click the “Remove” button at the bottom of the app. Then, select the user or users to remove.
My Account

Once logged in, if the selected account has activity on his/her account, it will be indicated in the “My Account” section, by a number representing the number of alerts.

**Checkouts** - This will display all of the checkouts a patron has at that moment. If the library allows for material renewals, then patrons will be able to renew the selected material from this view. You can also renew items from the detail view for each title. After clicking on the title, the renew button will be available to renew the material.

**Holds** - This will display all the holds a patron has placed at that moment. If the library allows editing holds, then patrons will be able to edit the selected material hold from this view. You can also edit a hold from the detail view for each hold. Select one or more titles to activate the “Edit Hold” option.
From within the BookMyne app, users can remove holds, change which library he/she wishes to pick-up the item, and suspend the hold (As an example, users will suspend holds if they will be away, but do not wish to lose their place in the queue.)

![Edit Hold]

**Digital Checkouts/Digital Holds** – This will display the items that patrons have checked out or placed on hold digitally. Also, they will be able to download, return, or remove digital items.

**My Lists** - This will display the custom book lists that patrons have created in eLibrary and HIP.

*NOTE: This does NOT show the lists created by patrons using the “My Lists” feature in Enterprise. Lists cannot be created in BookMyne, only viewed. These functions are planned for future releases.*

**Fees** – Displays any associated bills/accruing fines.

**Profile** - This will display the patron’s information. The option to change their PIN is also available.

![Profile]

*NOTE: You can add messages to display when your patrons perform any transactions from My Account. The set up of the transactional messages is covered in the MyAccount section in the BLUEcloud Central guide.*