



Reservations

These procedures apply when placing reservations on behalf of users or managing individual collection items. Tasks covered are:

- **Circulation tab / Reserve icon / Reserve an item or work – p. 1-2**
- **Title reservations – Reserve Work (trap first incoming item) – p. 3-5**
- **Item specific reservations – Reserve Item – pp 6-8**
- **Accessing reservation lists – p.9**
- **Deleting reservations – p. 10**

Tip: your users can manage their own reserves via the online catalogue. Encourage them to do so at every opportunity. Reserves placed through the online catalogue will always be Title Reservations. Please note the difference between Title Reservations (Reserving a Work) and placing an Item level Reserve.

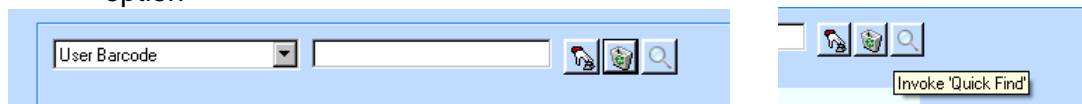
- *Reserving a work means the first available copy of the title will satisfy the reserve. Using this option will mean your users will receive the item they want sooner.*
- *Reserving a specific item means that particular item needs to be returned before your user will receive the item. Only use this when you want to reserve a specific copy for a user (such as a particular magazine issue) or as part of ongoing collection management (i.e. checking for damage).*

Circulation / Reserve / Reserve an item or work

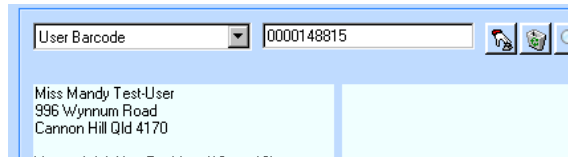
1. When you have an item in hand, the fastest way to reserve the item is to go directly to the **Reserve** screen (Circulation tab > Reserve icon).



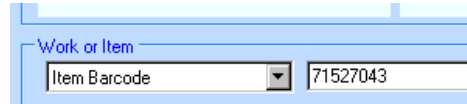
2. Scan the User barcode – if this is unknown locate through the **Quick Find** option



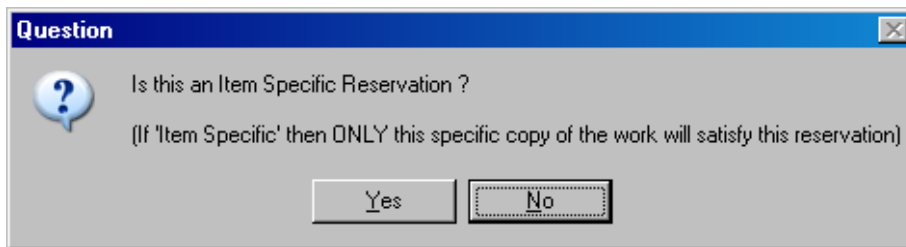
Tip: Check that the User details are correct before proceeding.



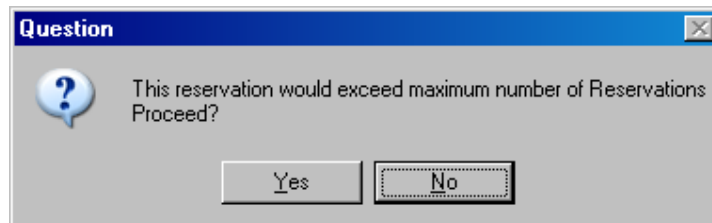
3. Scan the item barcode into the entry box (**Work or Item**).



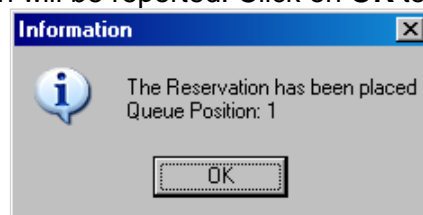
- You will be prompted by the following message



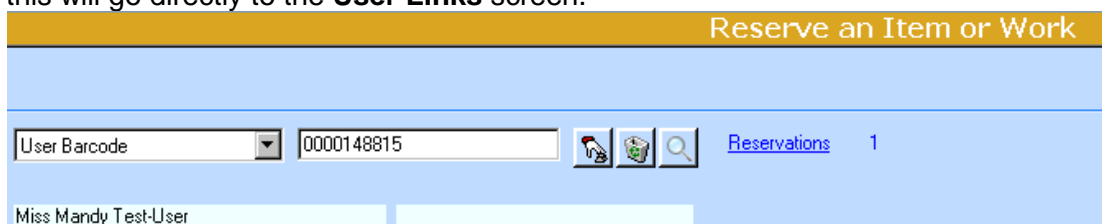
- For **Title** level reservations click on **No**
- For **Item Specific** reservations click on **Yes**
- You may be prompted to acknowledge the following message – click **Yes** to allow the reservation to proceed.
-



4. The queue position will be reported. Click on **OK** to acknowledge.

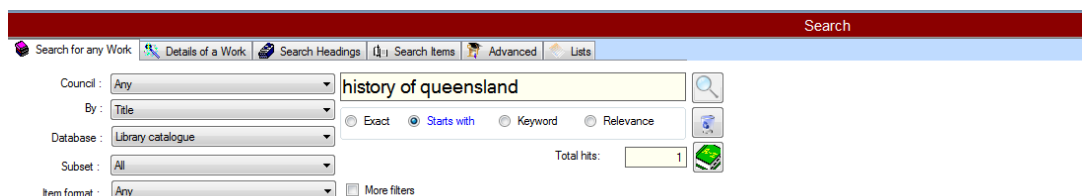


A summary of this user's total number of reservations is listed on this screen. You can check the details of these reservations by clicking on the **Reservations** link – this will go directly to the **User Links** screen.



Title reservations – Reserve Work (trap first incoming item)

1. Search and locate the title you wish to reserve (Circulation tab > Search icon)



Search for any Work Details of a Work Search Headings Search Items Advanced Lists

Council: Any history of queensland

By: Title

Database: Library catalogue

Subset: All

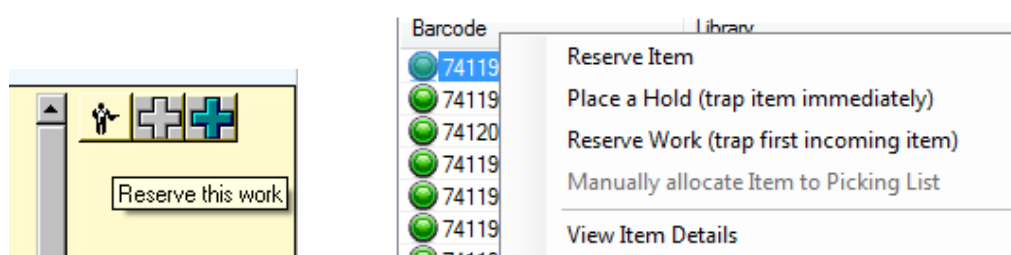
Item format: Any

Exact Starts with Keyword Relevance

Total hits: 1

More filters

2. From the results screen it is possible to place a reservation either through the **Reserve this work** icon or by highlighting one of the listed items.



Tip – if you highlight an item to activate the menu always select the option “Reserve Work (trap first incoming item)” as the preferred option.

3. The **Place a Reservation** screen will be activated.



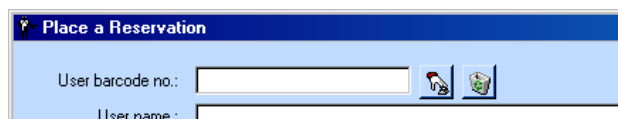
Place a Reservation

User barcode : []

User name : []

Title : **A history of Queensland / Raymond Evans.**
Evans, Raymond.
Cambridge ; Port Melbourne : Cambridge University Press, 2007.

4. Scan the user barcode into the entry box

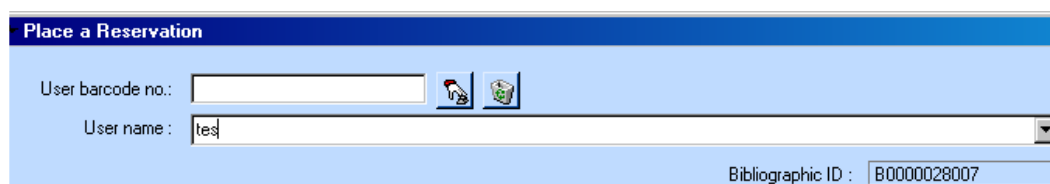


Place a Reservation

User barcode no.: []

User name : []

*Tip: you can search for user details by typing the surname into the **User name** entry box and pressing enter.*



Place a Reservation

User barcode no.: []

User name : tes

Bibliographic ID : B0000028007

- The details of the first user in the listing will be automatically displayed with their user barcode number – if this is not the required user, click on the down-arrow to make another selection.

5. Your IKC will display as the default **Collect at** location.

6. Once the user details are entered the **Place a Reservation** icon is activated.



7. The **Exit with no action** option is available if you do not want to continue.

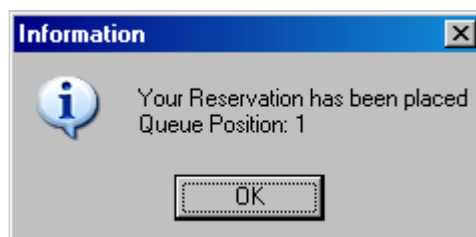


- When you click the **Place a Reservation** icon you will be prompted to confirm the reserve.

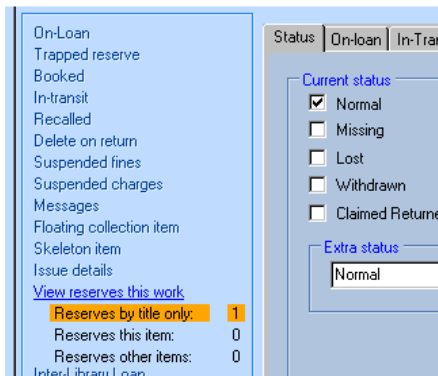
8. Clicking on **Yes** will place the reservation and report the position in the queue.



9. Click on **OK** to complete the action



- Both the **Item Details** screen will display the reservation (note this is a Title only reserve) as well as the **Details of a Work** screen.

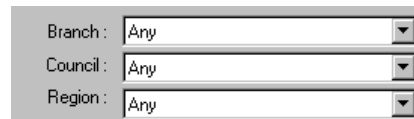


The screenshot shows the 'Reserves' screen with a table of reservations. The table has columns: #, Issue, User name, Queue, and Placed. The first row contains a reservation with ID 1, User name 'Test-User, Johnny', Queue '1 of 1', and Placed date '30/08/2012'. The table is paginated, showing page 1 of 10.

#	Issue	User name	Queue	Placed
• 1		Test-User, Johnny	1 of 1	30/08/2012

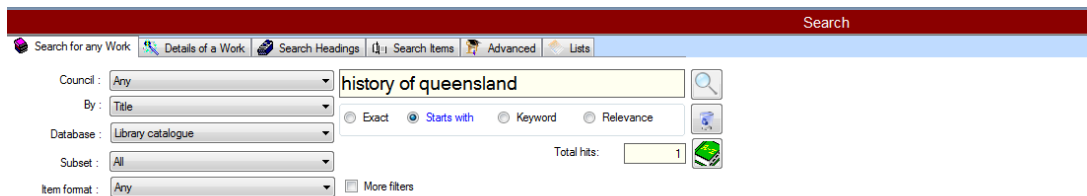
Item specific reservations – Reserve item

Tip – set your search to Any council to display the entire database's holdings.



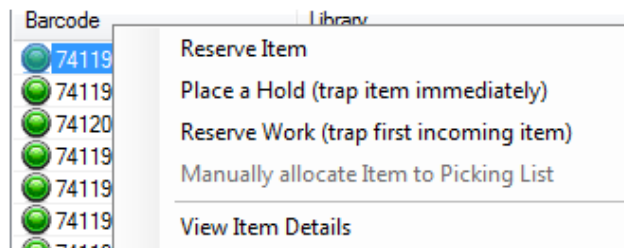
Branch : Any
Council : Any
Region : Any

1. Search and locate the title you wish to reserve (Circulation tab > Search icon)



Search
Search for any Work | Details of a Work | Search Headings | Search Items | Advanced | Lists
Council : Any | history of queensland | Exact | Starts with | Keyword | Relevance | Total hits: 1
By : Title
Database : Library catalogue
Subset : All
Item format : Any | More filters

2. To place an item specific reservation highlight the required item in the list and select the **Reserve item** option.



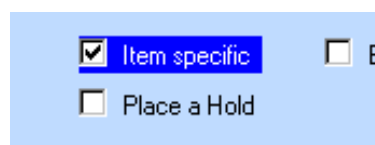
Barcode	Library
74119	Reserve Item
74119	Place a Hold (trap item immediately)
74120	Reserve Work (trap first incoming item)
74119	Manually allocate Item to Picking List
74119	
74119	
74119	View Item Details

3. The **Place a Reservation** screen will be activated.



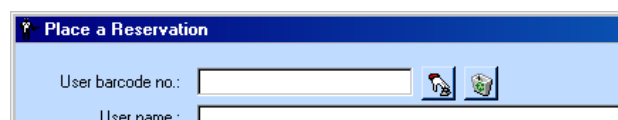
Place a Reservation
User barcode :
User name :
Title : **A history of Queensland / Raymond Evans**
Evans, Raymond.
Cambridge ; Port Melbourne : Cambridge University Press, 2007.

When using this option the **Item specific** checkbox will be automatically selected.



Item specific
 Place a Hold

4. Scan the user barcode into the entry box



Place a Reservation
User barcode no. :
User name :

*Tip: you can search for user details by typing the first few letters of the surname into the **User name** entry box and pressing enter.*

- The details of the first user in the listing will be automatically displayed with their user barcode no – if this is not the required user, click on the down-arrow to make another selection.

5. Your IKC will display as the default **Collect at** location.

- Once the user details are entered the **Place a Reservation** icon is activated.



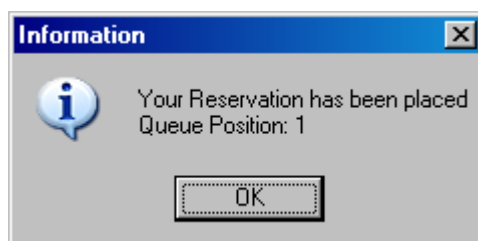
- The **Exit with no action** option is available if you do not want to continue.



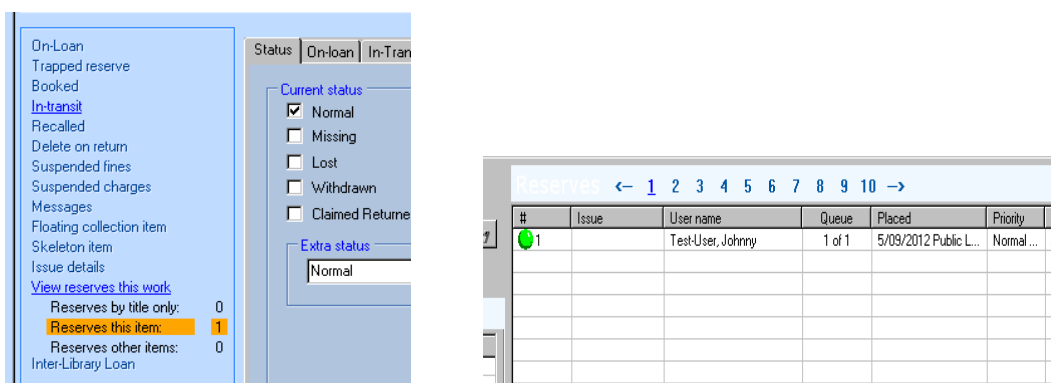
6. When you click the **Place a Reservation** icon you will be prompted to confirm the reserve.

- If there are other items on the shelf you will be prompted to confirm the reserve. Click on Yes to proceed.






7. The reservation will be placed and the position in the queue will be reported.



8. Click on **OK** to complete the action. Both the Item Details screen will display the Reservation (note this is an Item specific reserve) as well as the Details of a Work screen.



*Tip: the type of reservation is reflected in the status indicator displayed at the **Details of a Work** screen.*

-  The reservation is a Current and active **Title** reserve
-  The reservation is a Current and active **Item** reserve
-  The reservation is ready for collection
-  The reservation is Cancelled
-  The reservation has expired

Accessing reservation lists

Tip: reservation lists can be accessed in different ways.

1. By user details – from the **User Details** screen click on the **Reservations** link

The screenshot shows the 'User Details' screen. At the top, there is a 'User Barcode' dropdown menu set to '0000148961'. Below this, there are fields for 'Title', 'First Name' (Johnny), 'Initial', and 'Last Name' (Test-User). A 'Barcode no.' field also contains '0000148961'. On the right side, there are tabs for 'Basic' and 'Addresses'. At the bottom left, there is a summary table:

Items on-loan	0
Reservations	1
Requests	0

- This will open the **User Links** screen / **Reserves** tab

The screenshot shows the 'User Links' screen with the 'Reserves' tab selected. The top navigation bar includes 'Add Charge', 'Calls', 'Subscriptions', 'Requests', and 'Inter-library loans'. Below this, there are sub-tabs: 'Items', 'Reserves', 'Messages', 'Previous Loans', and 'Pay'. The 'Reserves' tab is active, showing a form for adding a reservation. Fields include 'Collect at' (Public Library Services (PLS)), 'Priority' (Normal priority), 'Scope' (Any), 'Expire on', and 'Active on'.

2. By title – **Search for a work / Details of a work** screen

The screenshot shows the 'Details of a work' screen for the book 'A kick to the head / Rhyllie Winn'. The 'Reserves' tab is selected, displaying a table of reservations:

#	Issue	User name	Queue	Placed	Priority	St
1		Test-User, Johnny	1 of 1	5/20/2012 10:11:11 AM	Normal	A

A right-click context menu is open over the first reservation, with 'View user links' selected. Other options include 'Priority', 'View item details', 'View user details', and 'Reserve item'.

- At the **Summary** tab click on the **Reserves** link, highlight the user's reserve, right mouse click to bring up a menu and select **View user links**.

The screenshot shows the 'User Links' screen for the user 'Johnny Test-User'. The 'Reservations' link is highlighted in the summary table on the right. The user details on the left include:

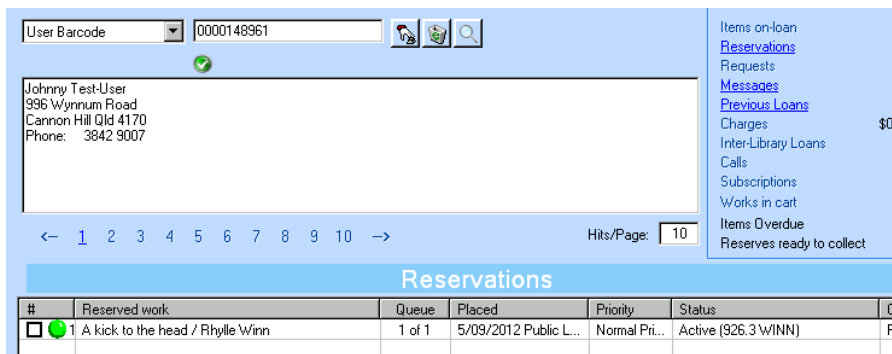
Johnny Test-User
 996 Wynnum Road
 Cannon Hill Qld 4170
 Phone: 3842 9007

Items on-loan	0
Reservations	1
Requests	0
Messages	1
Previous Loans	2
Charges	\$0.00
Inter-Library Loans	0
Calls	0
Subscriptions	0

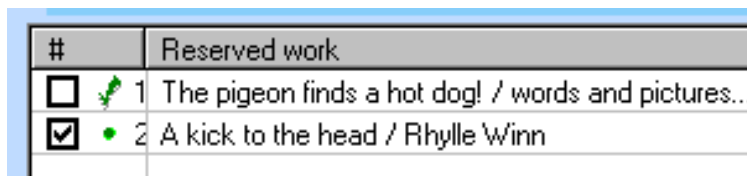
- Click on the **Reservations** link to display the user's list of reservations.

Deleting reservations

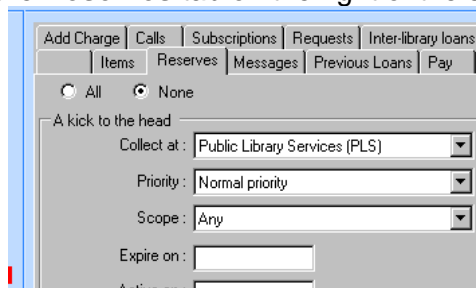
1. From the **Reserved work** list locate the reserve you wish to delete.



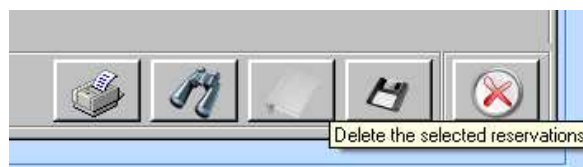
2. Select the request to delete by placing a tick in the selection box.



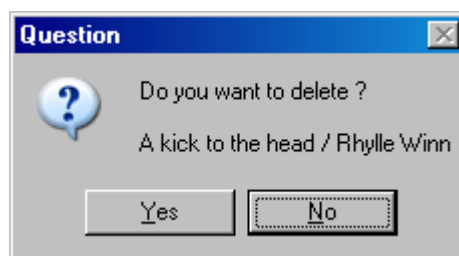
3. Once selected, the **Reserves** tab on the right of the screen will be activated.



4. Click on the **Delete** icon (lower right of screen) to remove the reservation completely.



5. You will be prompted to confirm the deletion – once you have clicked on **Yes** the reserve will be removed from the list.



Note – Cancelling a reservation is a suspension, not a deletion. Use of the deletion option is preferred.