

Rural Libraries Queensland

your local library network

Reserving items

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**
- **Reserve types – examples (Title vs Item specific) – pp 9-10**
- **Accessing reservation lists – p.11**
- **Deleting reservations – p. 12**

Tip: your users will 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.

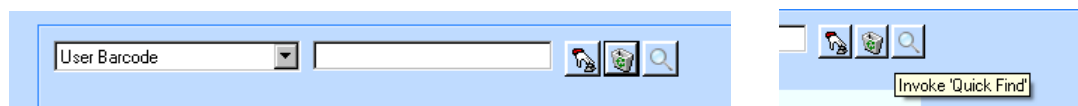
- *Reserving a work means the first available copy of the title will satisfy the reserve. Using this option will mean your users will receive the item they want sooner.*
- *Reserving a specific item means that particular item needs to be returned before your user will receive the item. Use this when 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

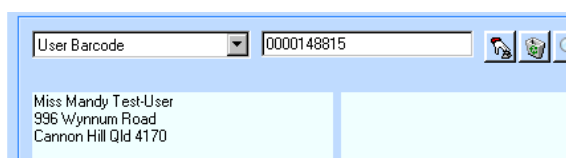
1. When you have an item in hand, the fastest way to reserve the item is to go directly to the **Reserve** screen (Circulation tab / Reserve icon).



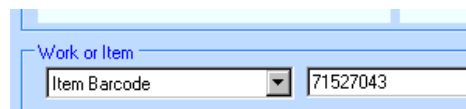
2. Scan the User barcode – if this is unknown locate through the **Quick Find** option



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

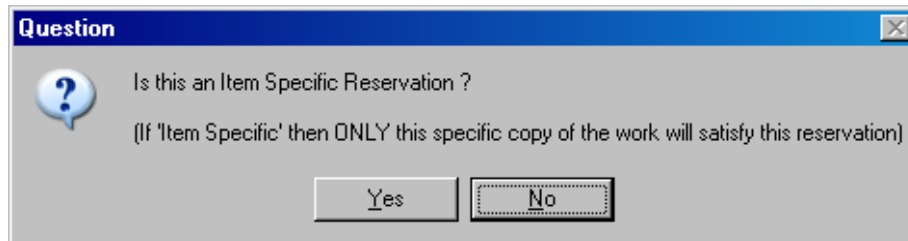


3. Scan the item barcode into the entry box (**Work or Item**).



Work or Item
Item Barcode 71527043

- You will be prompted by the following message

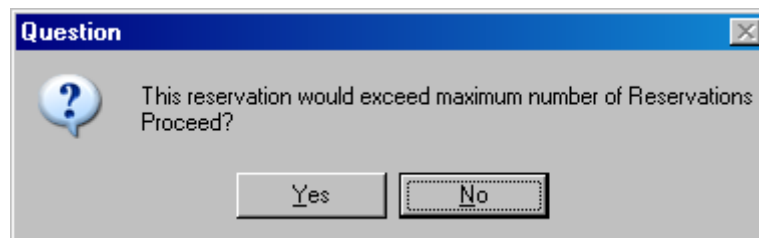


Question

Is this an Item Specific Reservation ?
(If 'Item Specific' then ONLY this specific copy of the work will satisfy this reservation)

Yes No

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

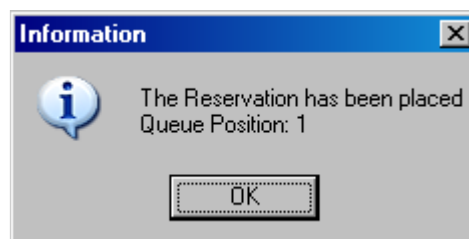


Question

This reservation would exceed maximum number of Reservations Proceed?

Yes No

4. The queue position will be reported on the successful placement of the reserve. Click on **OK** to acknowledge.

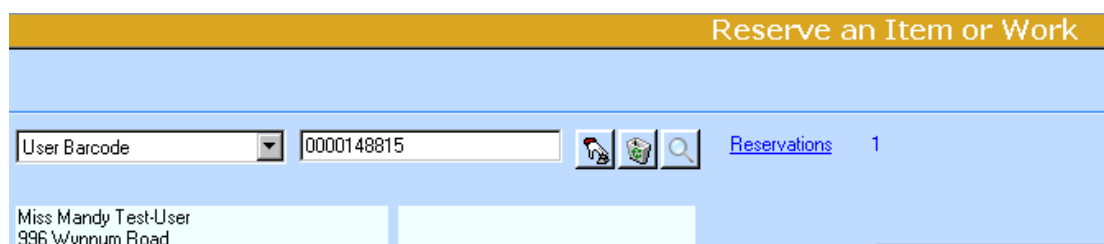


Information




The Reservation has been placed
Queue Position: 1

OK

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



Reserve an Item or Work

User Barcode 0000148815    [Reservations](#) 1

Miss Mandy Test-User
996 Wynnum Road

Title reservations – Reserve Work (trap first incoming item)

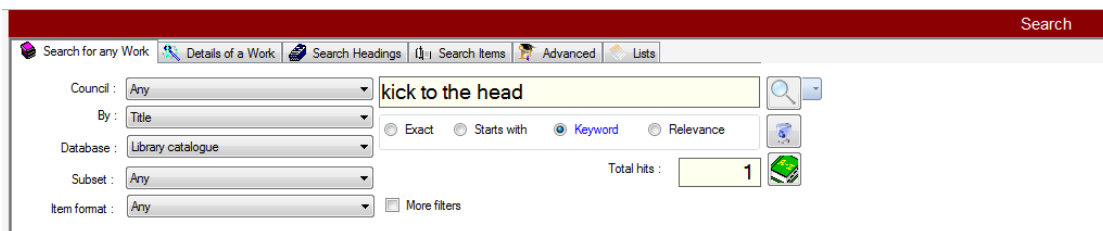
Tip – set your search to Any council to display the entire RLQ database's holdings.

Council :

By :

Database :

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



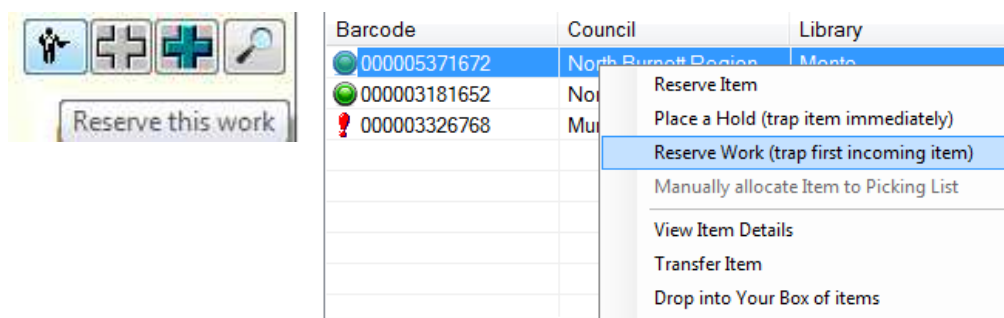
Search for any Work | Details of a Work | Search Headings | Search Items | Advanced | Lists

Council : Any | | Total hits : 1

By : Title | Exact | Starts with | Keyword | Relevance

Database : Library catalogue | Subset : Any | Item format : Any | 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.



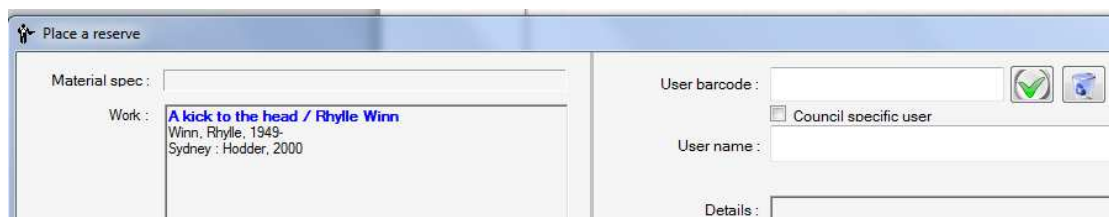
Barcode	Council	Library
000005371672	North Burnett Region	Monte...
000003181652	No...	
000003326768	Mu...	

Reserve this work

- Reserve Item
- Place a Hold (trap item immediately)
- Reserve Work (trap first incoming item)**
- Manually allocate Item to Picking List
- View Item Details
- Transfer Item
- Drop into Your Box of items

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

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



Place a reserve

Material spec :

Work : **A kick to the head / Rhylle Winn**
Winn, Rhylle, 1949-
Sydney : Hodder, 2000

User barcode : Council specific user

User name :

Details :

4. Scan the user barcode into the entry box



*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.*



User barcode : Council specific user

User name :

- 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.

User barcode : 99999  

Council specific user

User name : Test, Q

Details : Q Test
996 Wynnum Road

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

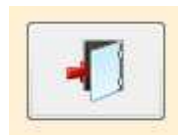
Action

Collect at : Public Library Services (PLS)

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.

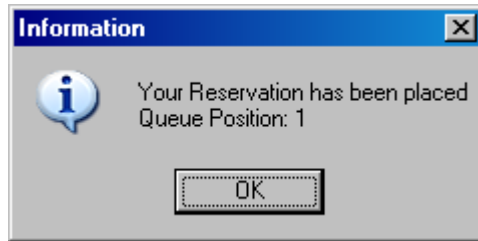


- When you click the **Place a Reservation** icon you will be prompted to confirm the reserve.

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



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



- 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 two parts of a library software interface. On the left is a sidebar menu with options like "On-Loan", "Trapped reserve", "Booked", etc. The "View reserves this work" option is highlighted, and below it, a summary shows "Reserves by title only: 1", "Reserves this item: 0", and "Reserves other items: 0".

On the right is a "Reserves" table with a header row and a data row. The table has columns for "#", "Issue", "User name", "Queue", and "Placed".

#	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 RLQ database's holdings.*

Council :

By :

Database :

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 :

By : Exact Starts with Keyword Relevance

Database : Total hits :

Subset : More filters

Item format :

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

Barcode	Council	Library
000005371672	N	North Down & Down
000003181652	N	
000003326768	M	

- Reserve Item
- Place a Hold (trap item immediately)
- Reserve Work (trap first incoming item)
- Manually allocate Item to Picking List
- View Item Details
- Transfer Item
- Drop into Your Box of items

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

Place a reserve

Material spec :

Work : **A kick to the head / Rhylle Winn**
Winn, Rhylle, 1949-
Sydney : Hodder, 2000

User barcode :

Council specific user

User name :

Details :

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

Item specific B...

Place a Hold

4. Scan the user barcode into the entry box

User barcode :

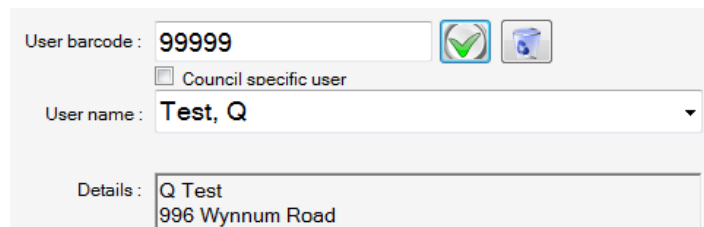
Council specific user

User name :

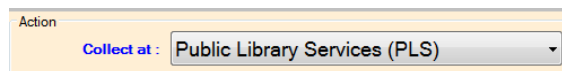
*Tip: you can search for user details by typing the first few letters of the surname into the **User name** entry box and pressing enter.*



- 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 library 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.



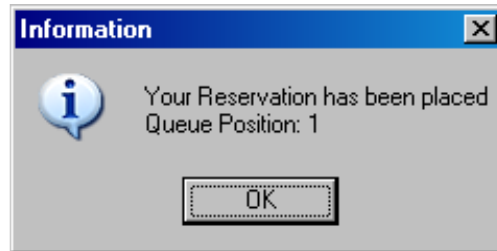
8. When you click the **Place a Reservation** icon you will be prompted to confirm the reserve.



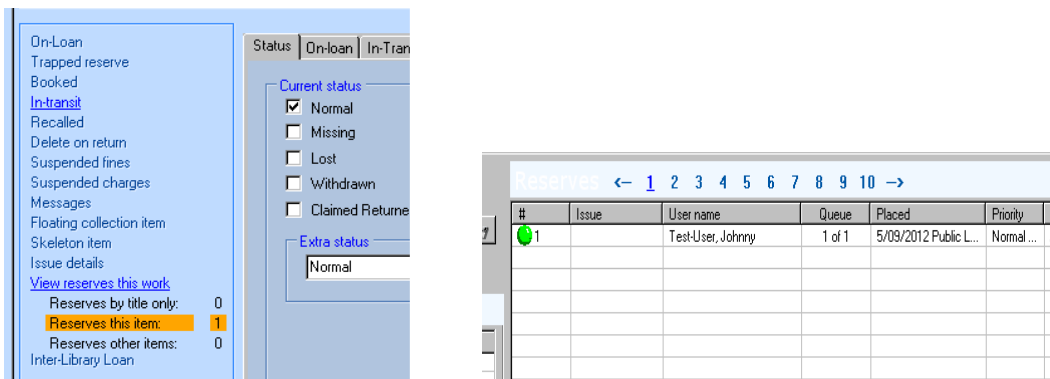
- If there are other items on the shelf you will be prompted to confirm the reserve. Click on Yes to proceed.



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



10. 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


Reserve Types – examples (Title vs Item specific)







The difference between title reservations and item specific reservations.

There are 5 copies of this title – **Blood brothers / Nora Roberts.**

2	Blood brothers / Josephine Lox.	Lox, Josephine.	2010
3	Blood Brothers	McCarthy, Gary	2002
4	Blood brothers / Nora Roberts.	Roberts, Nora, 1950-	2007
5	Blood brothers / Nora Roberts.	Roberts, Nora, 1950-	2007
6	Brothers By Blood	Dodge, Emerson	2002


Barcode	Council	Library	Sub-location
72834186	Croydon Shire Council	Croydon	Croydon
72834510	Carpentaria Shire Council	Normanton	Normanton
72834281	Quilpie Shire Council	Quilpie	Quilpie
72718460	Barcardine Regional Council	Alpha	Alpha
72834230	Longreach Regional Council	Longreach	Longreach

When you place a title reservation  (Small green dot) you place a reservation on all the items that belong to that title. So you reserve 5 works that belong to that title. I.e. **all** these items have been reserved below.

72834186	
72834502	
72834510	
72834281	
72718460	
72834230	

This is important for a number of reasons

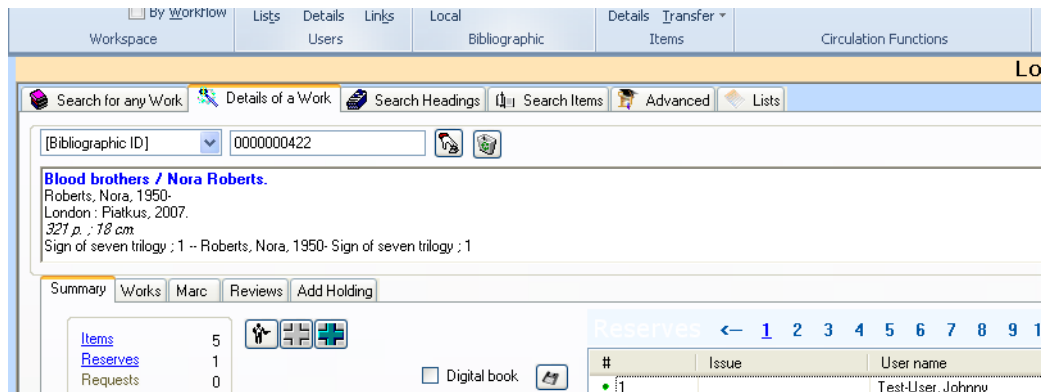
1. When the daily reservation report is run the 5 libraries that hold copies of this title will run the report and check the shelf for that title. Once the first item is trapped the reservation is then removed from the other 4 titles of that work. The library that has first trapped the item will send the book away to the requesting patron

2. When you place an item specific reserve  (big green dot) it will only place a reserve on **one** of the items that belong to that title. So if a library cannot locate or find that single copy you reserved then **you miss** out on receiving any of the other 4 copies. The patron will miss out on a copy of the book when there are extra copies on the shelves in other libraries.

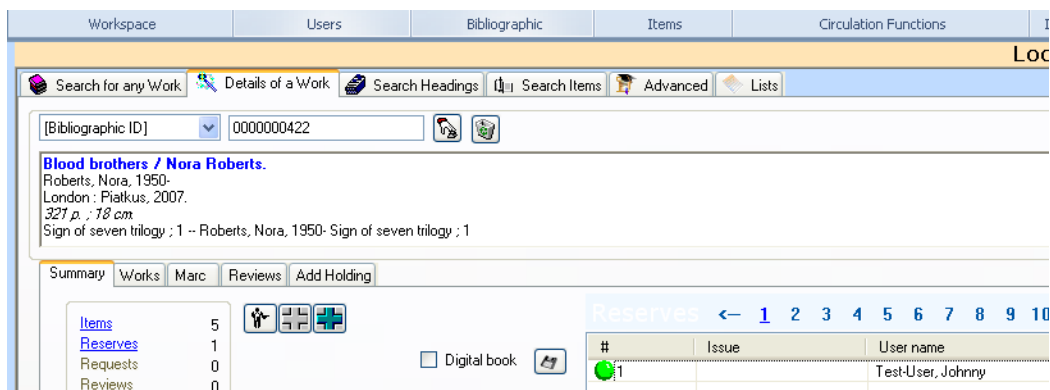
72834186	
72834502	
72834510	
72834281	
72718460	
72834230	

- The title level reservation is fairer as you select books from the entire RLQ network. It also means that books are reserved and moved around more equitably and the customer will receive their reserve quicker.

To check reservations for a title, go to **Search - Details of a work – Reserves** and see the queue for the items and the green dot/s. A title reservation has a small green dot.



An item specific reservation has a big green dot.

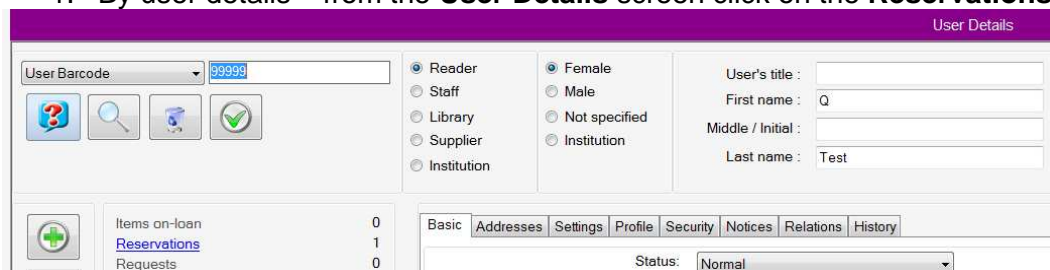


There **may** be instances where you find that using an item specific reservation is more appropriate or more advantageous to your patron/s. For example: a specific magazine issue may be needed, a specific damaged book or a specific book for a patron. But if you want to increase the chances of success when reserving materials; as well as avoiding customer complaints and disappointment use the title reservation.

Accessing reservation lists

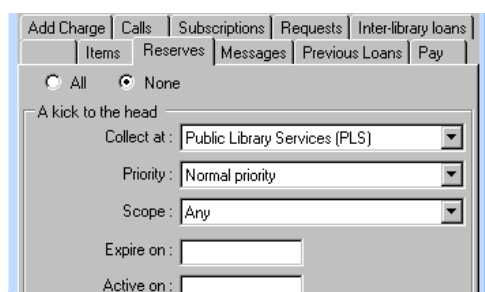
Tip: reservation lists can be accessed in different ways.

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



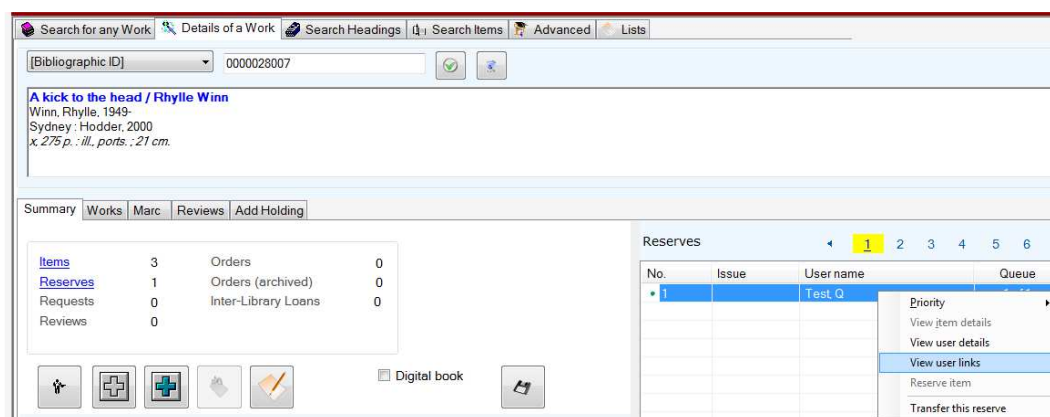
The screenshot shows the 'User Details' screen. On the left, there is a navigation menu with 'Reservations' highlighted. The main area displays user information: 'User Barcode' 99999, 'Reader' selected, 'Female' selected, 'User's title', 'First name: Q', 'Middle / Initial', and 'Last name: Test'. There are also tabs for 'Basic', 'Addresses', 'Settings', 'Profile', 'Security', 'Notices', 'Relations', and 'History'. The 'Status' is set to 'Normal'.

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



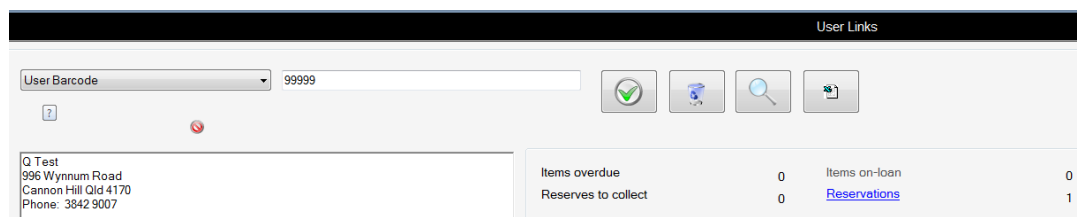
The screenshot shows the 'Reserves' tab in the 'User Links' screen. It features a form for adding a new reservation. The 'Collect at' field is set to 'Public Library Services (PLS)'. Other fields include 'Priority: Normal priority', 'Scope: Any', 'Expire on', and 'Active on'. There are also radio buttons for 'All' and 'None'.

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



The screenshot shows the 'Search for a work / Details of a work' screen. The 'Reserves' tab is selected, displaying a table of reservations. A context menu is open over the first reservation, with 'View user links' selected. The table has columns for 'No.', 'Issue', 'User name', and 'Queue'. The first reservation is for 'Test, Q'.

- 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**.

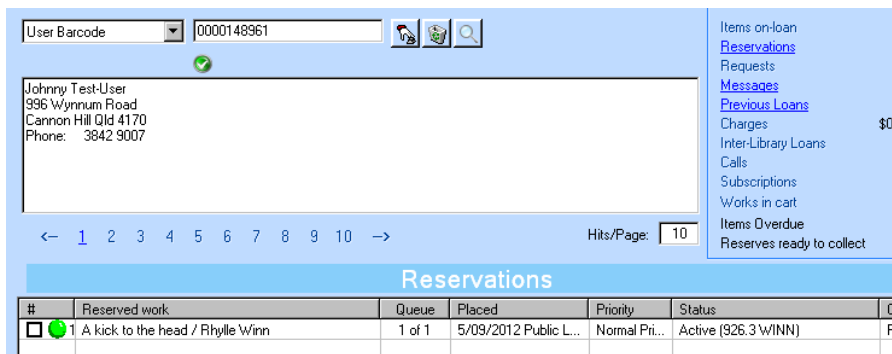


The screenshot shows the 'User Links' screen. It displays the user's details and a table of reservations. The 'Reservations' link is highlighted in the table. The user's details include 'Q Test', '996 Wynnum Road', 'Cannon Hill Qld 4170', and 'Phone: 3842 9007'. The table shows 'Items overdue: 0', 'Reserves to collect: 0', 'Items on-loan: 0', and 'Reservations: 1'.

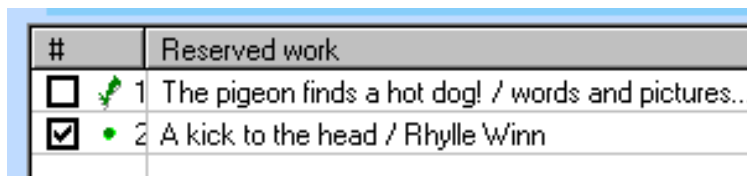
- Click on the **Reservations** link to display the user's list of reservations.

Deleting reservations

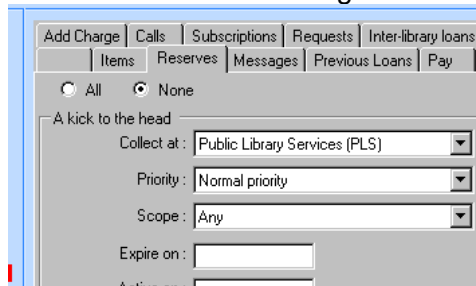
1. From the **Reserved work** list locate the reserve you wish to delete.



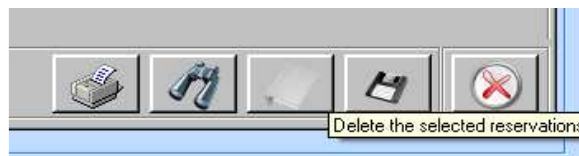
2. Select the request to delete by placing a tick in the selection box.



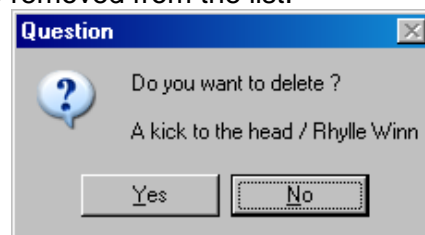
3. Once selected, the **Reserves** tab on the right of the screen will be activated.



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.