

# AFO 418 – Reservations review

## 418.1 Introduction

AFO 418 can be used to view all refused, uncollected and available reservations. After you have seen the totals per category, you can view the reservations per item and per borrower.

Other AFOs that pertain to reservations are:

- AFO 415 ('View / cancel reservations') with which all reservations from a borrower can be viewed or cancelled. In addition, this AFO can be used to modify the reservation period for a reservation;
- AFO 421 ('Place reservations') to register a reservation;
- AFO 422 ('Reservation queues') to modify the priority of hold requests;
- AFO 451 ('Prepare print functions and batch jobs') to prepare a print file for reservations messages;
- AFO 452 ('Perform print functions') to print the reservations messages.

Some of these functions can also be accessed from within AFO 418.

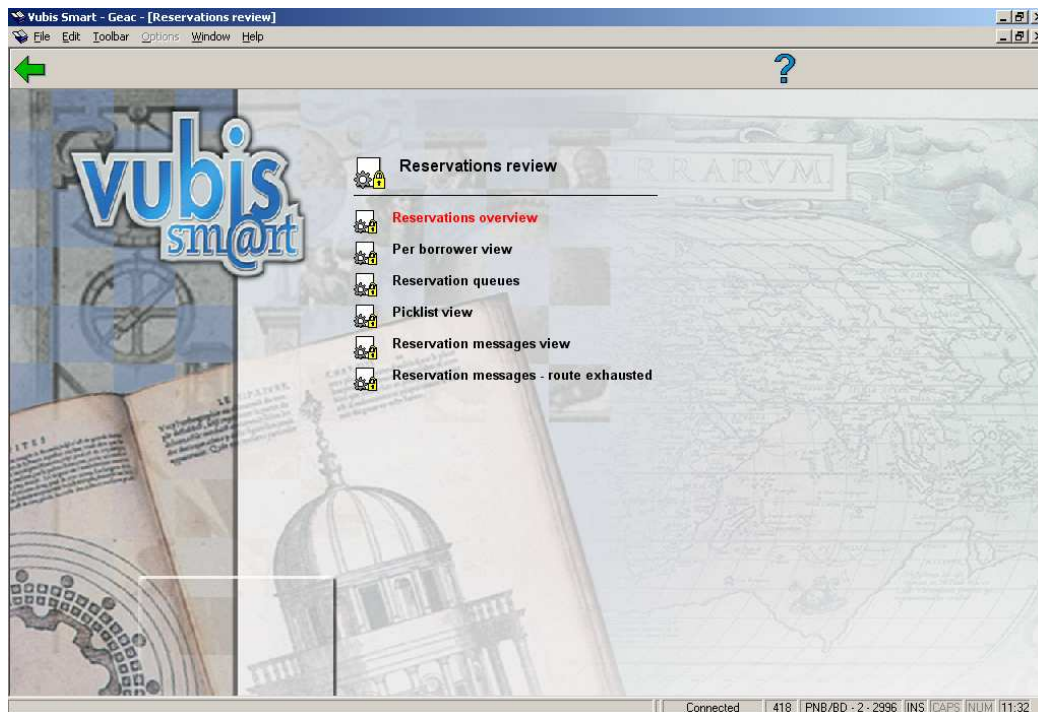
The following statuses are possible:

- **Open** (use for active and not yet trapped, no copies immediately available)
- **On picklist** (use for active, not yet trapped but copies on shelf – i.e. copies are on a picklist)
- **Pending** (the reservation has a future active date. It will become active when the active date equals today's date)
- **Trapped** (in practice you will not normally see this because the item will normally go on to be available for pickup or into transit the moment it is trapped. To see an item "trapped" it would need to be trapped but not sent into transit automatically for some reason)

- **Available for pickup** (the reservation is on the reservation shelf and available for pickup by the borrower)
- **Expired** (no item was trapped to satisfy the reservation before it reached its expiry date)
- **Not picked up** (the reservation was not picked up within the specified period of time after the reservation became available)
- **In transit** (the copy is trapped and in transit to the pickup location)

## 418.2 Reservations review – main menu

After choosing this option a sub menu will be displayed:



These six options are described in the next sections.

## 418.3 Reservations overview

After choosing this option an overview screen will be displayed:

No	Borrower's name	Borrower's barcode	Title	Pickup location	Status
1	A, Bo BO	20045X	The King and I for versio	PNB/SCH	Not picked up
2	Albers, LS	00011031	Bolo brigade	PNB/BD	Not picked up
3	Arthur, Macyl Mrs	200200047X	The Infinite Vulcan	PNB/BD	Not in stock-expi
4	Arthur, Macyl Mrs	200200047X	Star Trek Voyager	PNB/BD	Not picked up
5	Bell, Arthur	200200126X	2001	PNB/BD	Not picked up
6	Bell, Elsie Mrs	200200125X	Chanson pour un éléphant	PNB/BD	Expired
7	Bell, Elsie Mrs	200200125X	White nights	PNB/BD	Not picked up
8	Benham, Henry	200399046X	Dinosaur Planet	PNB/BD	Not picked up
9	Benham, Henry	200399046X	The Magic Kingdom of Land	PNB/CEN	Not picked up
10	Borrower, Lost card	200200204X	Dinotopia lost traduction	PNB/BD	Not picked up
11	Carter, Cinninnati Child without language field	200200079X	The seer king	PNB/BD	Expired
12	Carter, M.E.	200200109X	Dragondrums	PNB/BD	Not picked up
13	Chipperfield, Ian Mr	900024481	The uplift war zzzwzzzz	PNB/BD	Not picked up
14	Chipperfield, Teresa Anne Mrs	900024361	Dinosaur Planet	PNB/WP	Not picked up

## Options on the screen

**Select reservation:** gives access to AFO 415 (the functionality is identical).

**Output:** this uses standard output procedure and can be used to print the list of items that have not been picked up, for example.

**Bib data:** gives access to the full bibliographic record in Read Only mode.

**Borrower:** gives access to the full borrower record, i.e. a switch to AFO 431.

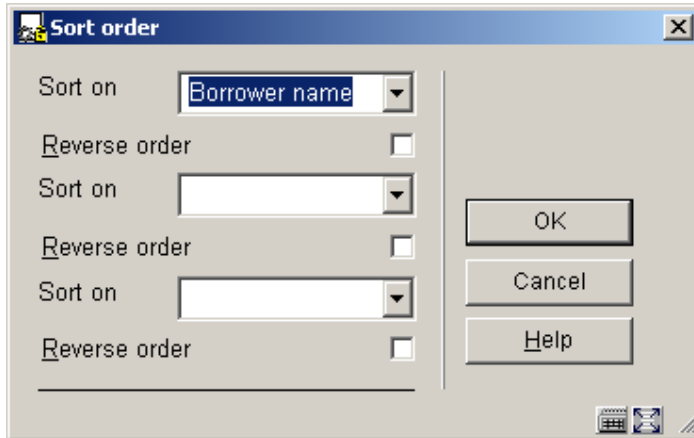
**Reservation queue:** gives access to AFO 422; the functionality is identical.

**Sort:** changes the sort criteria. See section 418.3.1.

**Filter:** to limit the display of the list with certain criteria. See section 418.3.2.

## 418.3.1 Sort

After choosing this option the following form will be displayed:



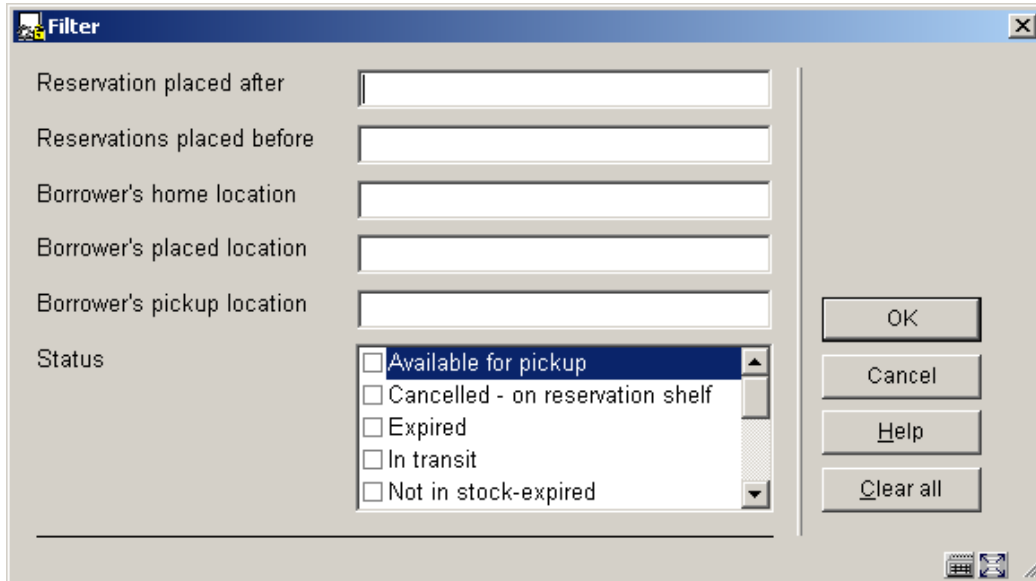
The system will allow up to (combinations of) three mechanisms for sorting. The available sorting mechanism will be:

- Author
- Borrower barcode
- Borrower name
- Home location of borrower
- Location where placed
- Pickup location
- Status
- Title

Select one or more criteria and specify whether sorting must be ascending or descending.

### **418.3.2 Filter**

After choosing this option the following form will be displayed:



The system can apply to the select list one or more filters, which can be:

- only reservations placed between date X and date Y
- only borrowers of home location X
- only borrowers that have at least one reservation placed at location X
- only borrowers that have at least one reservation with pickup location X
- only reservations of one or more statuses (e.g. expired, trapped, available for pickup, etc.)

In these examples, where it says "location X", "X" can have the following values:

- a location (e.g. "BB/C")
- all locations of an institution (e.g. "BB/\*\*")
- a string of locations (e.g. "BB/\*,TT/A,CNT/C,JJ/\*\*")

- all ("\*\*")

The system will automatically apply a filter based on the user's authorisation permissions (i.e. you can only access a view of locations to which you have access).

## **418.4 Per borrower view**

Select a borrower here. Enter a borrower barcode or part of the borrower's name. See the Help for AFO 431 for all options to identify a borrower.

When identifying a borrower who has no outstanding reservations, an empty overview screen will be displayed.

After identifying the correct borrower, an overview screen with the reservations details of this borrower will be displayed.

This option is identical to the reservations overview for a borrower in AFO 415.

## **418.5 Reservation queues**

This option offers the standard screen for bibliographic searches.

After performing a search the screen for placing a reservation is offered, as in AFO 421.

## **418.6 Picklist view**

When a reservation is placed for an item that is on the shelves in a library, the reservation will appear on the Picklist of the library that has the item or items. If multiple copies of one title (a single bibliographic record) are available at a single location they will all be listed on the picklist because they might have different shelfmarks or item categories.

If a reservation is placed on items in multiple locations, the reservation appears on the picklist of all the locations that have one or more copies on the shelf. When one of the libraries finds an item to satisfy the reservation and traps it, the reservation will be removed from all the picklists on which it appeared.

If there are multiple reservations for a title where there are multiple copies at a location, the picklist will display the reservations up to the maximum number of copies that it has on the shelves.

For example, if there are five reservations for the title "New book" and the Central Library has three copies on its shelves, only the first three reservations on the waiting list will appear on

the picklist. If the Branch Library has only one copy, they will only see the first reservation on the waiting list on their picklist. If the Branch Library finds a copy first and traps it, the reservation will be removed from their picklist because they no longer have copies available on their shelves. The Central Library picklist will automatically be refreshed to show reservations for the second, third and fourth reservations on the waiting list, because they still have three copies available.

Picklists are sorted by date and by location.

You can maintain picklists on a daily basis (where the current date is default), but it is also possible to combine the current picklist with previous picklists.

The Reservations column shows you how many reservations are waiting for items of a specific title.

What is shown on this screen also depends on parameter settings in AFO 481 – Circulation parameters – Reservations – Miscellaneous.

After choosing this option an overview screen will be displayed:

No.	Title	Author	Item	Shelfmark	Res.	Material code
1	De zwarte eenhoorn / Terry Brooks	Terry	39999res7new	BD De zwarte	1	BO (Books)
2	A view of the Kaleidoscope Century / Jo David		02220002	BD KC	1	ANN (Annual reports)
3	A view of the Kaleidoscope Century / Jo David		44455501	BD KCen	1	ANN (Annual reports)
4	Chanson pour un éléphant		00000951	BD Songs	1	BO (Books)
5	Battle hymn / William R. Forstchen		2310007	BD Fic BH	1	BO (Books)
6	Battle hymn / William R. Forstchen		5500101	BD Fic BH	1	BO (Books)
7	Battle hymn / William R. Forstchen		8877616	BD Fic BH	1	BO (Books)
8	Battle hymn / William R. Forstchen		99007711	BD Fic BH	1	BO (Books)
9	The Magic Kingdom of Landover		00000632	CEN Fiction	1	BO (Books)
10	The seer king / Chris Bunch	Chris	00000897	BD DM QA 123.1	1	MISC (Miscellaneous)
11	test oct7 sawing		11111111	BD MC 1111	1	BO (Books)
12	test oct7 sawing		22222222	BD MC 2222	1	BO (Books)
13	245\$a Complete USMARC Bibliographic 100\$a MacLeod, Debbi		123001	BD Test oct31	1	BO (Books)

This screen shows only item details for copies that are available at your current location.

The **Reservations** column shows the number of reservations for each title.

You can sort the display of the records by clicking the column heading. For example you can sort by shelfmark and then print the list to search your library shelves. Any of the columns can be used to sort the display.

The header pane shows the Last modified date and Picklist date.

**Last modified date:** date and time when reservations were last added to the picklist, or removed from the picklist because they were trapped or cancelled.

**Picklist date** date of the picklist.

Any reservations that remain outstanding (not trapped) on today's Picklist will automatically appear on the Picklist for the following day.

Reservations on Future picklists appear on today's picklist when they reach their active date.

### **Options on the screen**

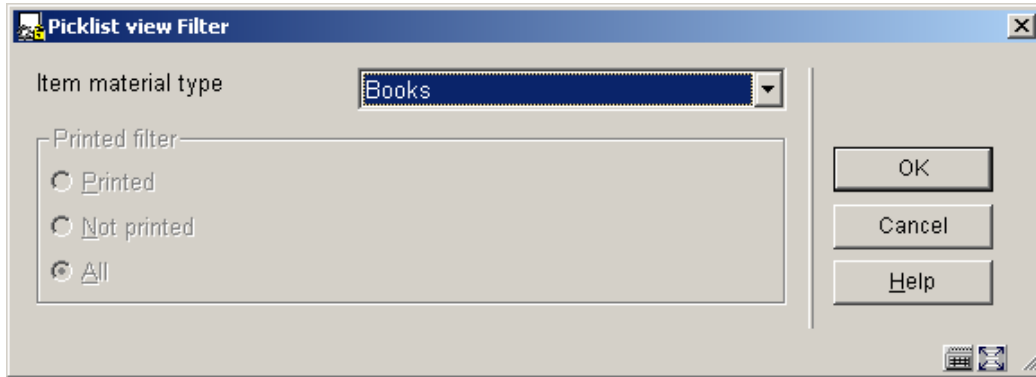
**Select:** this takes you to an overview of the selected reservation. From this screen you can view the details (as in AFO 415) or go to the reservations queue (as in AFO 422).

**Output:** this uses standard output procedure and can be used to print the list of items that have not been picked up, for example.

**Bib data:** gives access to the full bibliographic record in Read Only mode.

**Filter:** to limit the display to a certain material type:





**Trap:** When items have been found on the shelf you must trap them. See section 418.6.1.

**Pending picklists:** This option takes you to an overview screen with picklists. Optionally you can combine picklists from other dates here.

**Selective print:** Select an item from the list and choose this option, the standard form for output is displayed. You can use this to print the selected item.

**Delete from picklist:** choose this option to delete the selected item from the picklist. The system will prompt for confirmation.

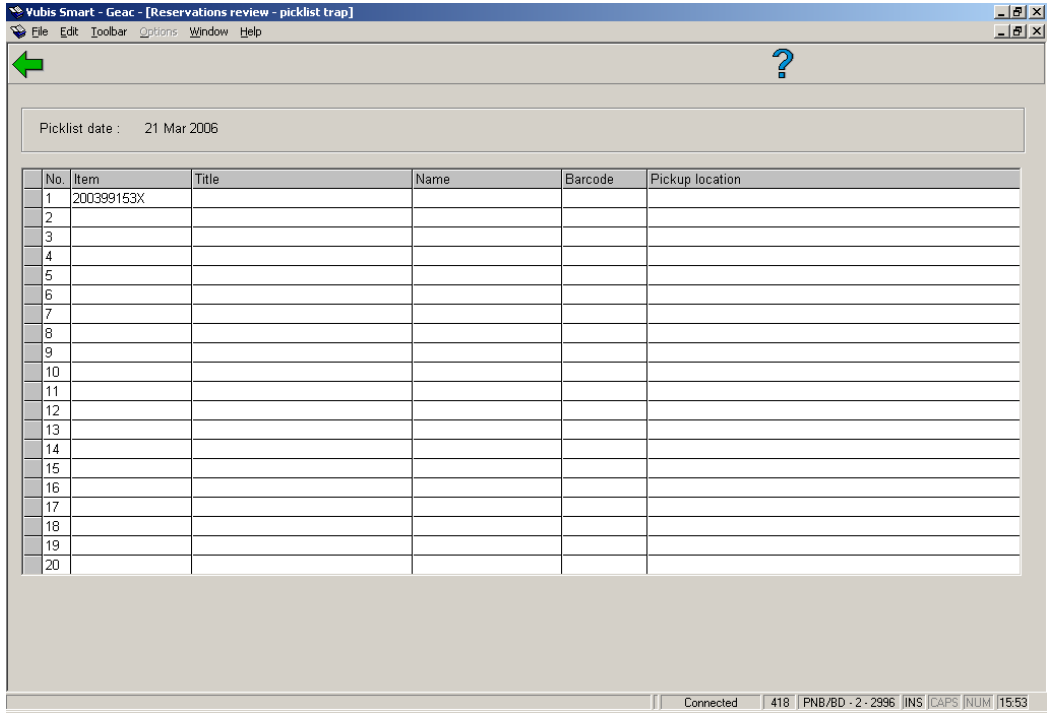
**Modify status:** this option is similar to the Modify status option in AFO 423. You can use this to assign a missing status (in case the item turns out not to be on the shelf after all).

## 418.6.1 Trap items

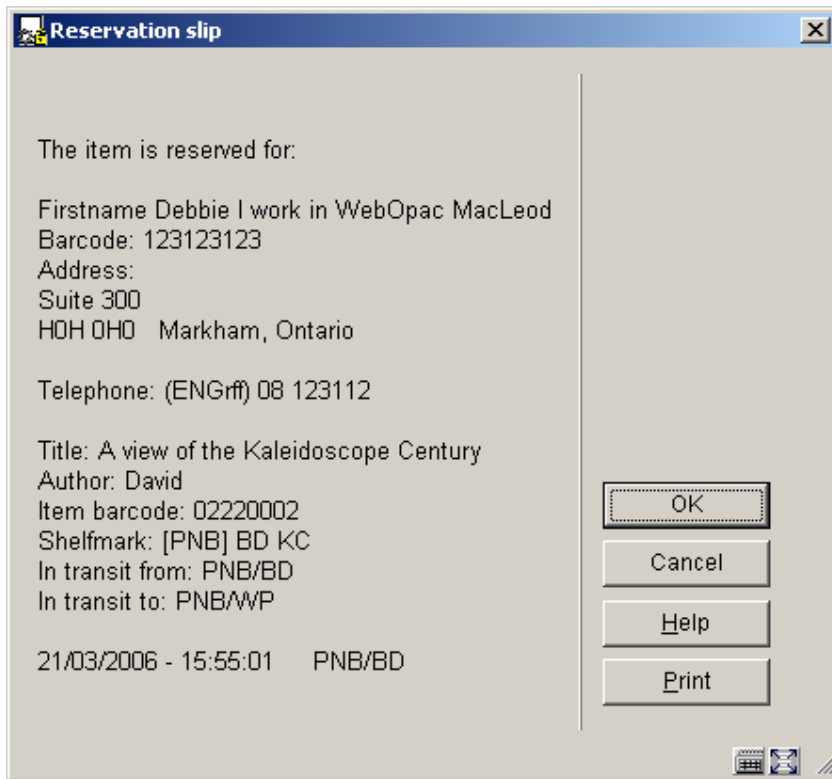
The items that appear on the picklist are items for which a reservation was made whilst they were not on loan. Once you have picked the items from the shelves, you must trap them in order to activate the reservation.

Click on **Trap**.

The Picklist trap reservations screen is displayed:



Enter the item barcode of the item(s) you want to trap. A reservations message is shown:



Either just acknowledge the message or click **Print**, to print a reservations slip.

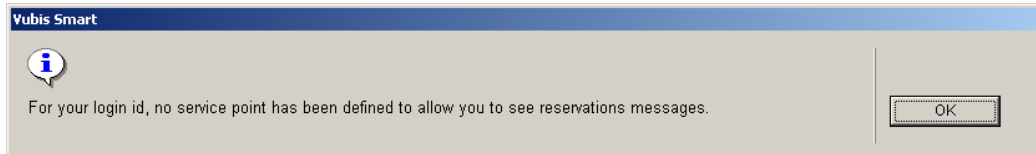
Return to the Reservation review – picklist screen. The items should no longer be on the list.

## 418.7 Reservation messages view

See also the [Help for AFO 618 – Service points maintenance](#), for more information on the concept *Reservations Messaging Subsystem*.

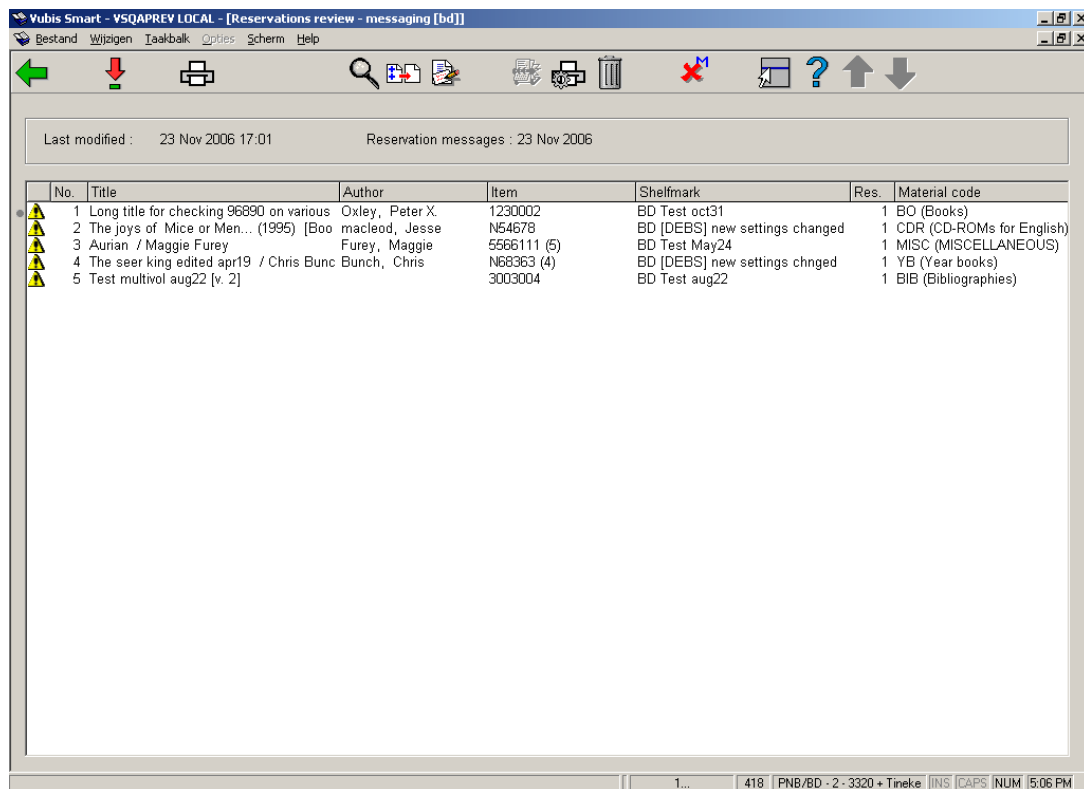
This shows the reservations / items selected for your current “service point”. Your service point is defined in a user setting for each login id from AFO 611.

If this has not been defined for a user, then they will not have access to the reservations messaging picklist view. The following message appears:



More than one service point may be assigned to a staff user; if so, then they will be asked to identify for which service point they are working on when entering the messaging picklist.

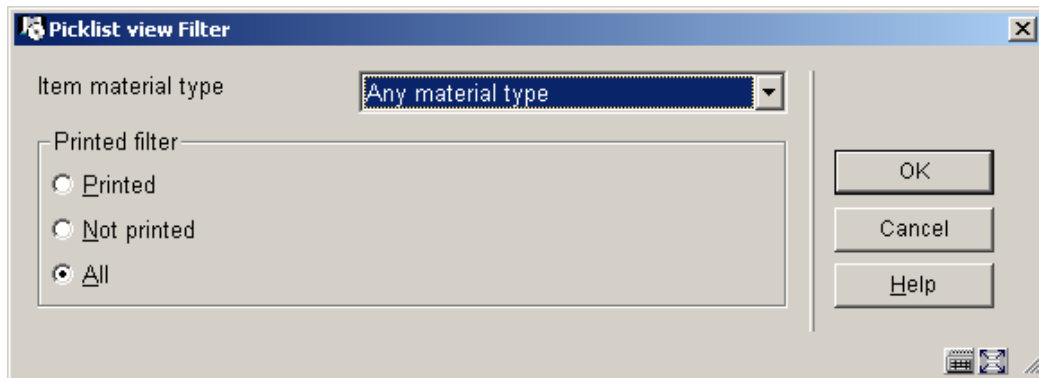
The reservations message view of the picklist is very similar to the regular picklist view.



The following is different :

- A warning triangle is displayed against those entries which have not yet been printed.
- In addition to showing the item barcode “chosen” by the messaging processing, the system shows the number of possible barcodes apparently available for the service point. This acts as a warning that the staff member should attempt to pull the chosen item from the shelves.

- A filter has been added to the display – it is now possible to filter the displayed reservations firstly by whether printed or not, and secondly according to the item category for the items selected (e.g. to limit the display to DVDs only).



- A printing option has been added to allow for the printing of one or more selected lines.

By double clicking a line, you are taken to the borrower list for the selected item. It is possible to display ALL the reservations for this title by clicking on the **ALL** button.

The other options are the same as those on the picklist overview screen.

#### Note

There is one further change to the behaviour of the picklist from the messaging view. Normally, when trapping an item it will be selected for the first borrower in any reservation queue; however, in the reservations messaging context, the item will be trapped for the borrower shown. Since the reservations were originally processed in priority order, there is almost certainly going to be another item selected for the first borrower on the queue and when that one is trapped it will be saved for the first borrower.

## 418.8 Reservation messages – route exhausted

See also the [Help for AFO 618 – Service points maintenance](#), for more information on the concept *Reservations Messaging Subsystem*.

This option allows you to view reservations messages for which all service points have been consulted and no action was taken to select the item.

After choosing this option an overview screen will be displayed:

Yubis Smart - VSQAMAIN T ONTWIKKELDING - [Reservations overview - - messages for which the route has been exhausted]

Bestand Wijzigen Taakbalk Opties Scherm Help

Sorted by  
Filtered by  
Showing 2 out of 2

No	Borrower's name	Borrower's barcode	Title	Pickup location	Status
1	Oxley, Patrick	200399096X	Eloise's Broken Sword	PNB/BD	Not in stock-open
2	Oxley, Darla	50055	Eloise's Broken Sword	PNB/BD	Not in stock-open

Connected | 418 | PNB/BD - 4720 + Tineke | IINS | CAPS | NUM | 1:33 PM

The display shows those reservations for which the messaging has exhausted its possibilities. The display is almost identical to the display of reservations in general, although the filter command allows for fewer possibilities. The view is almost identical to the general overview screen of reservations (see section 4.17.3). The option **Filter** has fewer possibilities. And there is an option **Delete**, to be used when staff are satisfied that the message has been fully dealt with, without affecting the progress of the outstanding reservation which may remain active on items still on loan.

After selecting this option, you can apply an action to the selected message:

Delete or mark a route exhausted message

Select action code: Lockdown description

Set by:

Date:

Select an action code for the selected message

OK  
Cancel  
Help

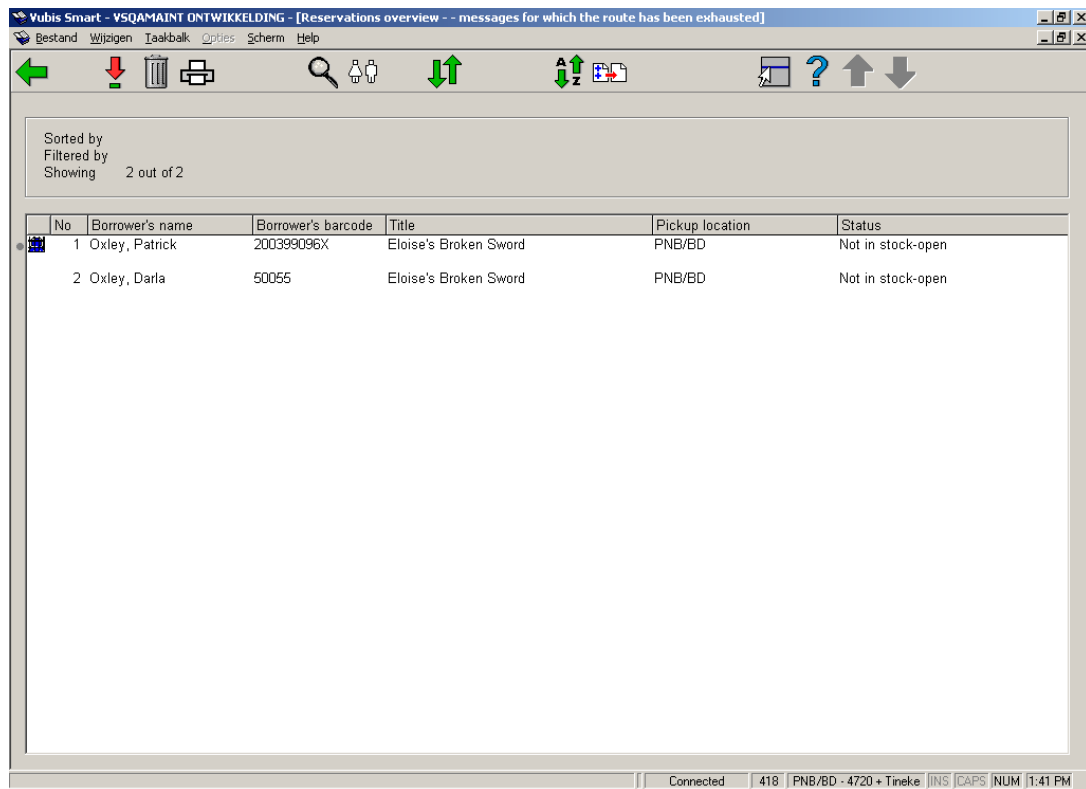
Fields on the screen

**Select action code:** Select the required action code form the dropdown list.

**Set by:** entered by the system (see below).

**Date:** entered by the system (see below).

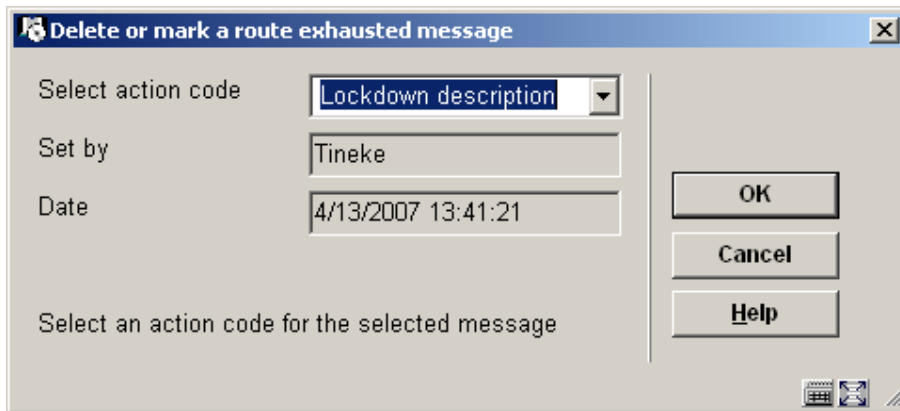
If the message is not subsequently hidden, then the designated icon is shown against the message to indicate its current state of play. For example, the “lock” in the example screen has been used to indicate that the reason for this reservation appearing in the list has been investigated.



The screenshot shows a window titled "Yubis Smart - VSQAMAIN T ONTWIKKELDING - [Reservations overview -- messages for which the route has been exhausted]". The window contains a toolbar with various icons and a table of reservation data. The table has columns for No, Borrower's name, Borrower's barcode, Title, Pickup location, and Status. Two reservations are listed, both for the title "Eloise's Broken Sword" at pickup location "PNB/BD" with a status of "Not in stock-open". The first reservation is for Patrick Oxley (barcode 200399096X) and the second is for Darla Oxley (barcode 50055). A small icon is visible next to the first row.

No	Borrower's name	Borrower's barcode	Title	Pickup location	Status
1	Oxley, Patrick	200399096X	Eloise's Broken Sword	PNB/BD	Not in stock-open
2	Oxley, Darla	50055	Eloise's Broken Sword	PNB/BD	Not in stock-open

If you use the **Delete** option for a message already marked, then the system will show the current status together with the name of the user who set the action, and the date and time set.



You may change the action associated with a message, but you may not remove it. If you need to do this, then it would be necessary to create an action code such as "Re-opened" to highlight this condition.

**Note**

The option **Delete** is NOT available if the "Show all locations" filter is turned on.



- **Document control - Change History**

<b>Version</b>	<b>Date</b>	<b>Change description</b>	<b>Author</b>
<b>1.0</b>	<b>unknown</b>	<b>creation</b>	
<b>2.0</b>	<b>November 2006</b>	<b>updates for release 2.4.2 build 1; added link to AFO 618 documentation</b>	
<b>3.0</b>	<b>April 2007</b>	<b>added info on route exhausted actions</b>	