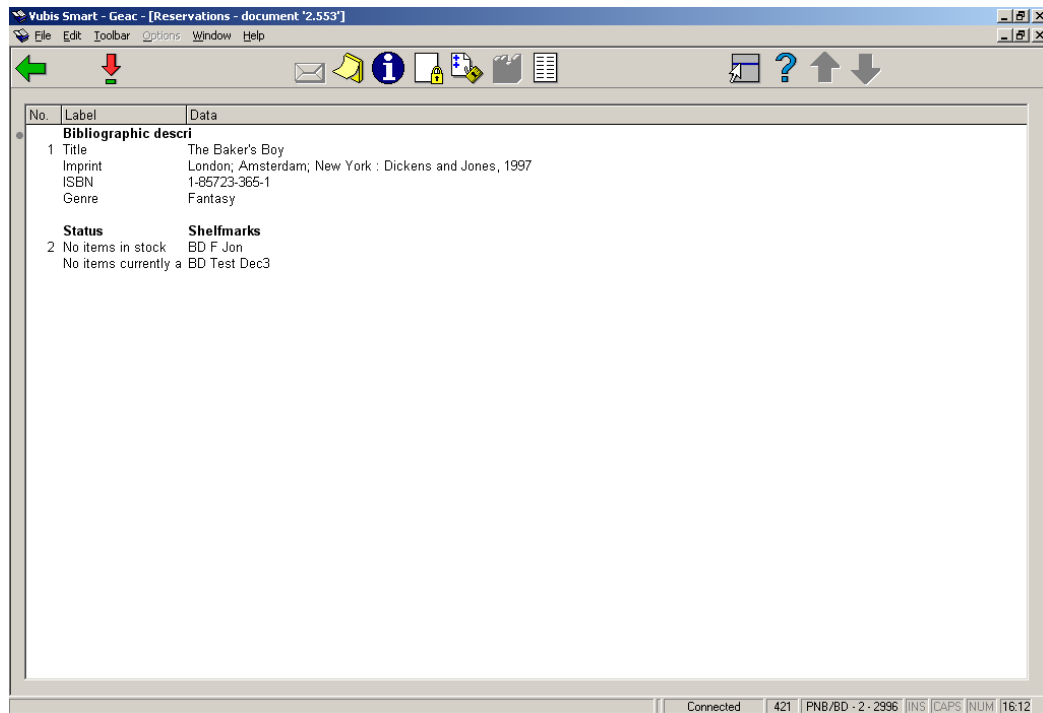# AFO 421 – Place reservations

## 421.1 Introduction

Various parameters control how reservations are placed, maximum limits on the number of reservations, borrower categories allowed or prevented from reserving particular item categories, and fees for placing reservations, etc. You can define:

- for each borrower category the maximum number of reservations the borrower can place

- for each borrower category the reservation charge (if any)

- if a charge is made when the reservation is placed or when it is collected

- for each borrower category whether reservations are permitted, for every item category

- whether staff can allow reservations to be placed on items the borrower is not allowed to borrow

- the maximum number of reservations for each item category

- how long an item can stay on the reservations shelf awaiting pickup

- how long the system will try to satisfy a reservation request before setting it to be expired

- the generation of recall notices

- the charges made, if any, for reservations placed through the WebOpac

- charges for notification by post, SMS, or email

- how existing reservations are treated if a new item is added to stock

- whether reservations are permitted where there is a copy on the shelf.

# 421.2 Place reservation

When you choose this option you are first presented with the standard search screen for bibliographic searches.

Once you have performed your search, you are presented with the screen for placing reservations.



**Options on the screen**

**View data**: takes you to an overview screen with details of all items of this title.

**Request**: this option is for future use.

**Memorize**: use this option to add the title to a savelist.

**Holdings information**: this is the same as **View data**.

**Place reservation**: this takes you to the screen where you can place the reservation. See section 421.3.

**Reservation status**: choose this option to view the actual reservation status of this title. The system either switches to the reservations list (AFO 422) or displays a message that there are no reservations.
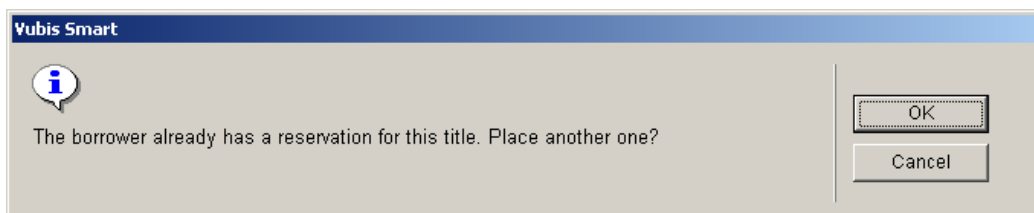
**Stack request**: this option is for future use.

**Item transfer history**: this option relates to Circulating Stock. See the Help on this subject for more information.
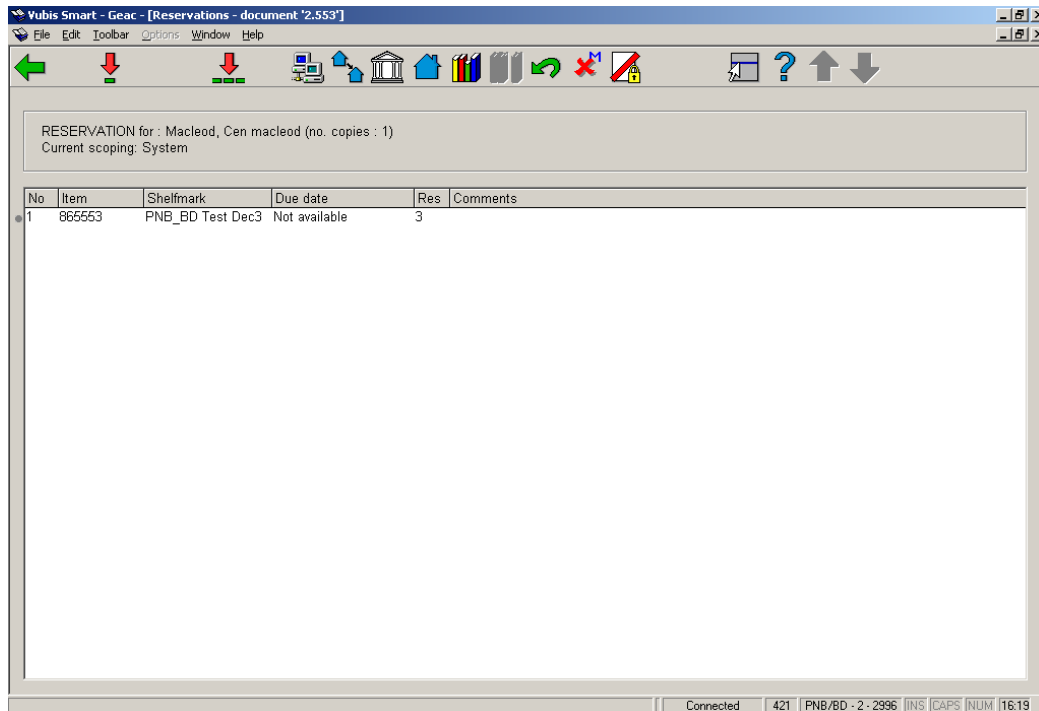
# 421.3 Place reservation

After you have chosen **Place reservation** you must first identify a borrower. See the Help for AFO 431 for all options to identify a borrower.

When you want to create a reservation for a borrower who already has a reservation on this title, a message will be shown:



# 421.3.1 Overview screen

After identifying the borrower, an overview screen is displayed:

## Options on the screen

**Reserve copy/copies**: Choose one ore more items and then this option to place the reservation. See section 421.3.2.

**Reserve all copies**: Choose this option to place a reservation on all copies of the title. See section 421.3.2.

**Limit by area**: You can choose an area from the dropdown list. These areas are defined in AFO 481 – Reservations – Miscellaneous.

**Note**

This button is available only if the parameter "Possible placement reservation areas" for the current location contains one or more reservation areas. This parameter is set in AFO 481 – Reservations – Miscellaneous.

**Limit by Institution / Location**: Choose this option to reduce the copies displayed to the institutions/Locations of your choice. Enter the each of the institutions that you wish to continue displaying, separating them with a comma and click **OK**.

**Limit by Institution(s)**: Choose this option to reduce the copies displayed to the institutions of your choice. Enter the each of the institutions that you wish to continue displaying, separating them with a comma and click **OK**.

**Limit by Location**: Choose this option to reduce the copies displayed to the location of your choice. Enter the each of the institutions that you wish to continue displaying, separating them with a comma and click **OK**.

**Limit by shelfmark**: Choose this option to reduce the copies displayed to the shelfmark of your choice. Enter the each of the institutions that you wish to continue displaying, separating them with a comma and click **OK**.

**Note**

You may only enter numerical or uppercase shelfmarks or numbers from shelfmarks for this delimiter to work.

**Choose volume**: This option is only available with multi-volume titles. You can choose which volume to place the reservation on

**Undo limits**: Choose this option to undo the limits set and return to the standard settings.

**Override maximum**: Choose this option to go ahead and place another reservation, if you have permission to do so.

**Override restrictions** Choose this option to go ahead and place the reservation anyway, if you have permission to do so.
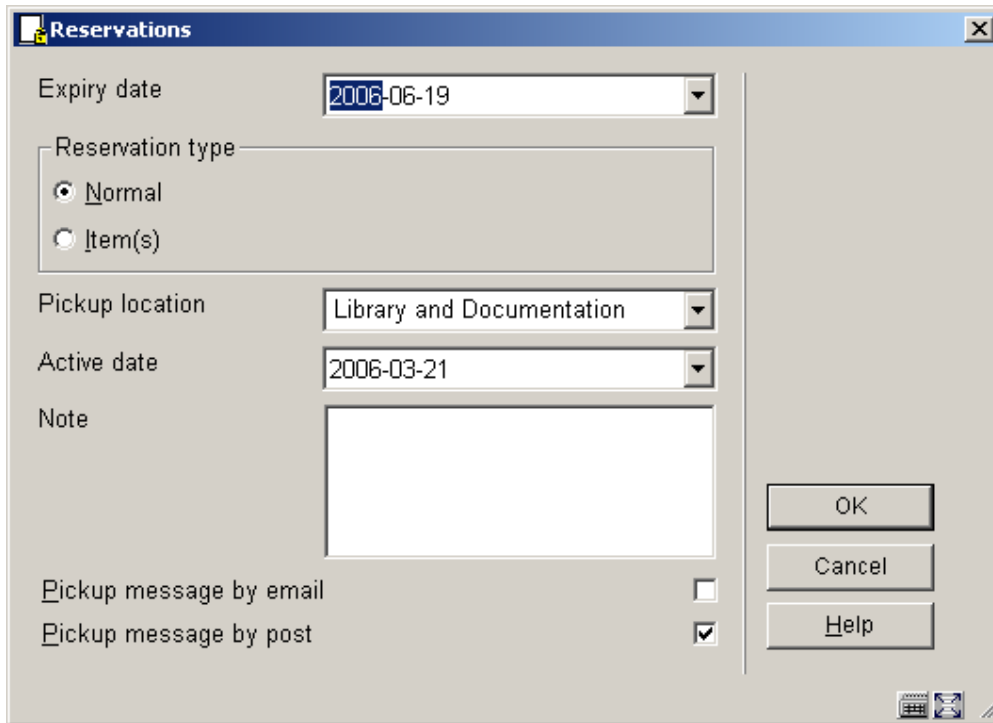
**Note**

When you place a reservation the system checks if the location at which you are placing the reservation has the "Default placement reservation area" parameter set. This parameter is set in AFO 481 – Reservations – Miscellaneous. If the parameter is set the system automatically limits the items on the reservation by the defined area. If the parameter is not set, the system limits the items for the reservation as it did in previous releases.

Once you make a selection, the system limits the items on the reservation to those that belong to the locations that are part of the reservation area selected. This limit is not applied on top of the default reservation area limit. It is applied *instead* of the default.

# 421.3.2 Place reservation

After choosing **Reserve copy/copies** or **Reserve all copies** the following form will be displayed:



**Fields on the screen**

**Expiry date**: enter the length of time that the system should attempt to satisfy the reservation. The field defaults to the expiry date set in the parameter Reservation expiry periods in AFO 481.

**Reservation type**: Choose one of the options:

- **Normal** - if the reservation is made against more than one item the first item trapped will satisfy the reservation. One reservation fee is charged if applicable.

- **Item** - if the reservation is made against more than one item all of the items will be trapped to satisfy the reservation. The reservation fee will be charged per item.

**Pickup location**: - select the location from which the borrower wishes to collect the reservation from the dropdown list. This defaults to the current location.

**Active date**: this defaults to today's date but may also be set to a future date. Items with reservations with an active date in the future appear on Future picklists if they are on the
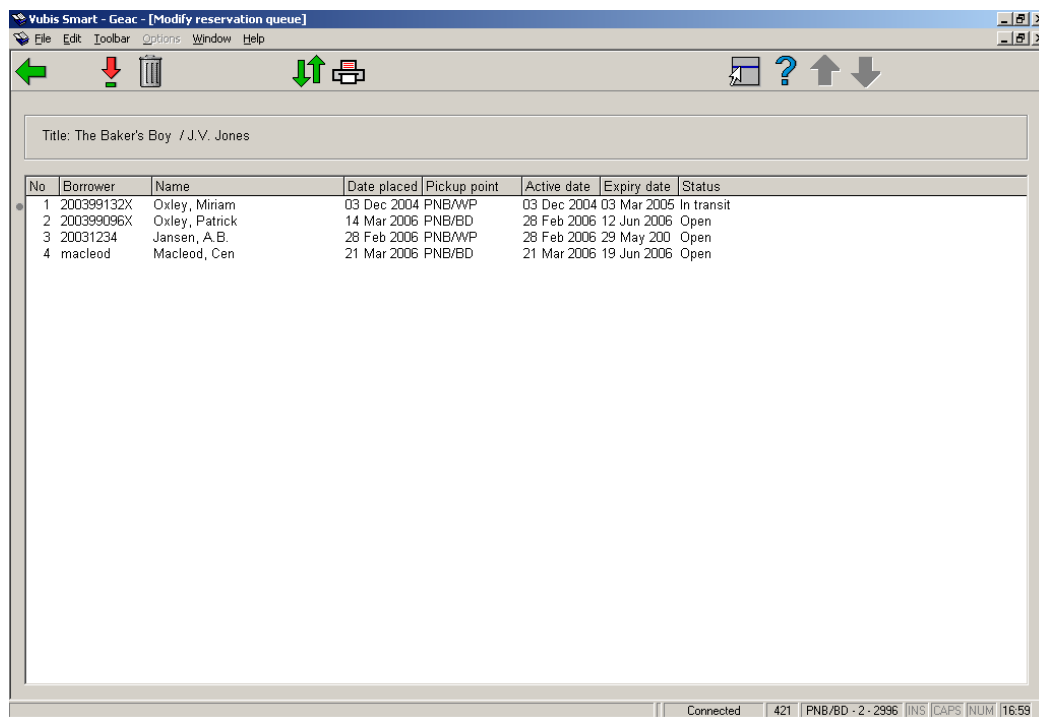
library shelves. Unless they are trapped via a picklist, they may circulate to other borrowers until the reservation reaches its active date.

**Note**: a free text field.

**Pickup message**: Depending on parameter settings in AFO 616 – Links to other systems – Vubis Smart Client Settings & Borrower contact methods, you have a choice here which contact method to use to notify the borrower.

After placing the reservation the system will return to the overview screen with title and item details.

If you now choose **Reservation status** you can see the reservation you just placed on the overview screen:



You have the same options here as in AFO 422:

- look at the details and then

  - modify the reservation

- view which notices have been sent

- etc.

- cancel reservation

- change the order of the queue

- print the reservations queue

- **Document control - Change History**

| Version | Date | Change description | Author |
|---------|------|--------------------|--------|
| **1.0** | **unknown** | **Creation**<br><br>**Delivered as part of build 17 set** | |