AFO 415 – Update / cancel reservations

415.1 Introduction

Using AFO 415, you can view items for which a borrower has submitted reservations. This AFO can also be used to modify a reservation and/or to cancel one or more reservations submitted by a borrower. Furthermore, stack requests as well as Interlibrary Loan requests for a borrower can be viewed from this AFO.

Other AFOs that pertain to reservations are:

- AFO 418 ('Reservations review') for viewing reservations that are available for pickup, cancelled, uncollected;

- AFO 421 ('Place reservations') to place a reservation;

- AFO 422 ('Reservation queues') to modify the queue position of reservations;

- AFO 451 ('Setup borrower notices and batch maintenance') to prepare a print file for reservations messages;

- AFO 452 (Start print jobs') to print the reservations messages;

- AFO 618 (Service point maintenance) if you use the reservations messaging subsystem and/or the Stack request module.

- AFO's 821 and 822 if you allow Interlibrary Loan requests

415.2 View reservations

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 reservations, an empty overview screen will be displayed.

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

Columns on the screen

Status: The status of the reservation. The following statuses are possible:

- **Open** (use for active and not yet trapped, no copies immediately available)

If the parameter *Display position of reservation in queue* in AFO481 – Reservations - Miscellaneous is turned on, then the queue position determined is shown after the "status" value in brackets. It is shown ONLY for "Open" reservations since it has no meaning or significance in any other cases.

- **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)

Category: The item material type.

Author: (part of) the author name as defined in !Author (Element/Group profile).

Title: (part of) the title as defined in !Title (Element/Group profiles). Includes volume if this is a volume level hold.

Available: The date on which the reservation became available for pickup.

Notice created: The date on which a reservation notice has been generated. The reservation is available for pickup and the notice was generated on the date shown. The reservation notice has not necessarily been printed via Start print jobs but only generated.

Placed: The date on which the reservation was placed.

Active: The date on which the reservation will become active (this can be later than the date placed).

Expiry: The date after which V-smart will no longer attempt to satisfy the reservation.

Pickup at: The location at which the borrower will be able to pick up the reservation when it is available. A pickup Location of "Where found" means pickup where found.

Type: Either normal (any copy of the title can satisfy the request) or item (only a specific copy of the title can satisfy the request).

Options on the screen

New: to add a new reservation for the selected borrower.

Modify: to access the update / cancel reservations detail screen.

Cancel: to access the update / cancel reservations detail screen.

Item overview: to access the item overview screen.

Print reservation notice: to "force" another reservation notice into the batch file (AFO 451). This option is only available for reservations that are "Not picked up" or "Available for pickup".

Bib data: access to the full bibliographic record, in Read Only mode

Borrower: access to full borrower record, AFO 431

415.3 Details

After choosing to display the details of a particular reservation, the following overview screen will be displayed:

Fields on the screen

Placed at: Institution/Location at which the reservation was placed. For items ready for pickup, it will show the pickup location.

Reservation priority: The priority assigned at time of placing the reservation (only if the institution uses this functionality). Updating the priority of an existing reservation is possible when it is still open or active. See the help for AFO 421 and 481 Reservations parameters for more information.

Date and time placed: Date and time on which the reservation was placed.

Active date: Date on which the reservation becomes active.

Note

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. Use a calendar control.

Date and time trapped Date on which an item was trapped to satisfy reservation.

Note

If the item is trapped at the pickup location this will be the same as the date on which it becomes available for pickup but if the item is trapped at a location and then has to go into transit to the pickup location the Trapped date and Available for pickup dates/times will be different.

Date and time available: Date and time at which the trapped item arrived on the Available for pickup shelf.

Date notice created: Date when the notice was generated. This does not necessarily mean the notice was actually printed, just generated.

Pickup message by: How to inform borrower that reservation is available for pickup. The options offered here are dependant on parameter settings in AFO 616, Contact Methods and Miscellaneous settings for notice output.

Expiry date: Date after which the system will no longer attempt to satisfy the reservation.

Note

It is possible to edit the expiry date for the reservation at the title level and apply it to all items that might satisfy the reservation. Use a calendar control

Pickup location: Description of the location to which the item will be sent for pickup by the borrower. It is possible to edit the pickup location of the reservation at the title level for all items that might satisfy the reservation. A pickup Location of "*Pickup where found" means pickup where found.
If the item is available to be picked up and the current location is the pickup location then it will be allowed to change the pickup location. A message will be displayed:
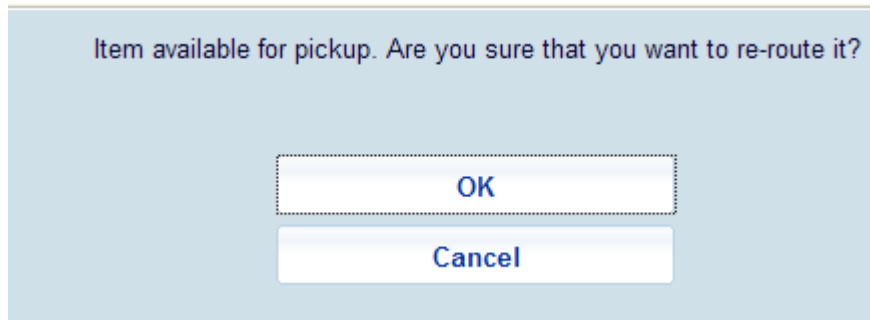
After clicking **OK**, the item will be put in transit to the new pickup location.

Note: a free text field for comments.

Source: Source of the reservation, this can be: Staff (via the client) or WebOPAC (by a borrower).

Reservation type: Either normal (any copy of the title can satisfy the request) or item (only a specific copy of the title can satisfy the request).

Scope by: Scope of the reservation, one from: System wide – no selection = system; Selected list of Institutions/Locations; Institution + [INSTITUTION]; Location + [LOCATION]; Selected shelfmarks. The scope is set when placing the hold. This is controlled by a parameter in AFO 481 – Reservations – Miscellaneous.

Note

All edit actions apply to the reservation (i.e. to all reserved items) and not to an individual reserved item.

415.3.1 Messaging

In some cases (when you use the Reservations Messaging Subsystem), another button **Messages** may appear on the form.
See the Help for AFO 618 – Service points maintenance, for more information on the concept *Reservations Messaging Subsystem*.

Messages: when you click this button an overview of messages sent is displayed.

Under various circumstances, an item may be removed from the reservations message list. The displays will show a reason why the item was removed / deselected from the message list. For example:
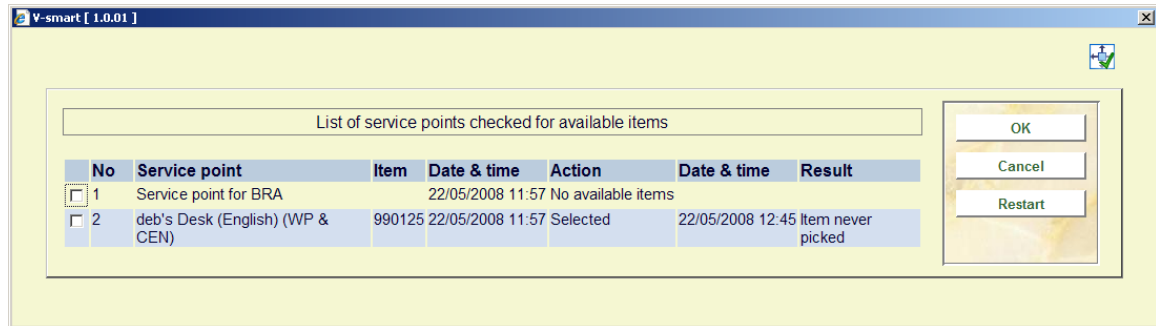
Possible reasons are :

- **Deleted from list**   A user manually removed the entry from the messaging picklist.

- **Item status has changed**   The item is no longer available – followed by a code indicating the new item status.

  - **U** - on loan, **A** – it is no longer at an active location, **W** – item is in transit

- **Set to missing**   The item has been assigned a missing status.

- **Item now trapped for reservation**   The item is trapped now – you are unlikely to see this reason.

- **No specific reason available**   No reason code associated – messages occurring before this release will show this "reason" (since the information was not logged before).

- **Unknown reason code**   The system has found unexpected data for the "reason" – this represents a system problem and will be followed by the unexpected code.

- **Service point data is corrupted**   Represents a technical problem

- **No items - technical**   Represents a technical problem

- **No information now available for service point list (when selected)**   This represents a complex situation (unlikely to occur) where the parameters that caused the item to be added to the list (some time ago) are now no longer available. (For example, if a user deleted all the relevant settings!)

- **Completed**   The required action has been performed.

- **No available items**   No items have been found to satisfy the request.

- **Item never picked**   The item has never been picked to satisfy the request.

- **Deselected**   This is a prefix that will be followed by the reason for deselection.

- **Selected**   This denotes the item has been selected to satisfy the request.

415.4 Cancel reservations

From the overview screen of reservations for a borrower you can cancel reservations. When cancelling a reservation via the client, an input screen is offered. From this screen you have to select a cancellation reason from the dropdown list. The screen looks like this:
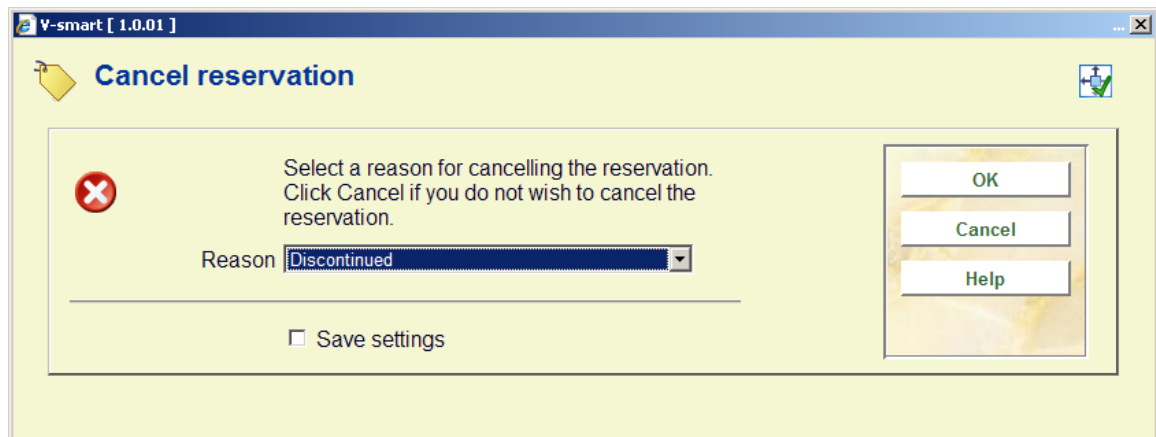
- choose a cancellation reason from the dropdown list and click **OK**

- when you click **Cancel** the reservation will not be discarded

Cancellation reasons are defined in AFO 481 – Reservations – cancellation reasons.

The following system defined cancellation reasons are available:

Type	Explanation

1	Cancelled – WebOpac
2	Cancelled – no longer required
3	Cancelled – expired
4	Cancelled – cannot supply

These cancellation reasons cannot be deleted, but you can create more. Examples of library-defined cancellation reasons that belong to type 4 are: "too expensive", "out of print", "inappropriate request", etc.
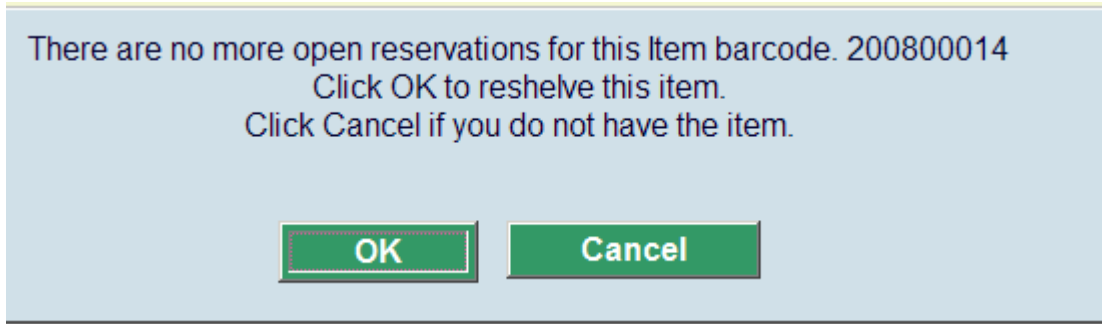
If the item was available for pickup at the point of cancellation, various messages may appear after you have entered a cancellation reason.
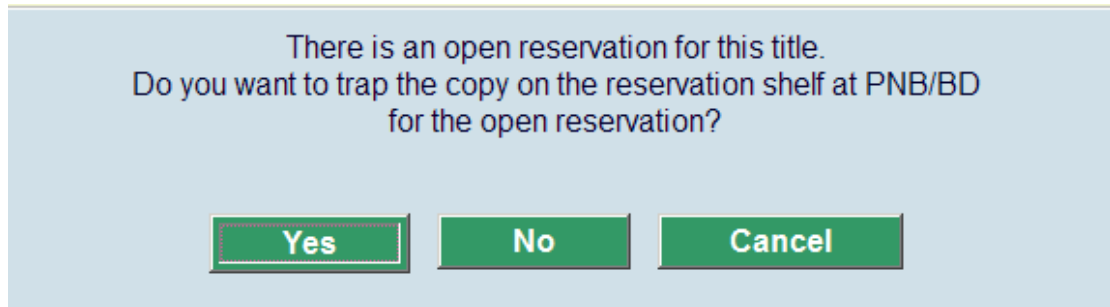
There is an open (Active) reservation. If you have the item in hand then you would most likely trap the item for the reservation, click **Yes**. Click **No** if you do not have the item.

If you click **No**, one of the next two messages would appear depending on if the item is at it's home location.

If the item is at it's home location this message would appear:

There are no more open reservations for this Item barcode. 200800014
Click OK to reshelve this item.
Click Cancel if you do not have the item.

OK   Cancel

This message is indicating that there are no more reservations for the item. Click **OK** to reshelve this item if you have the item in hand. Click **Cancel** if you do not have the item.

If you clicked **Cancel** because you do not have the item in hand, in AFO418 Overview there will be an entry for this item "Cancelled - on reservation shelf". These entries the user would process later when they have the item in hand and would go to AFO418 – Picklist and trap the item to see where it should go next.

When viewed in AFO 423, the item may have a status of Reservation – Not trapped (Item is not on loan) if there are still open reservations on this item. If you click on **Reservation queue** here, you will see the additional information.

If the item is not at it's home location this message would appear:

There are no more open reservations for this Item barcode. 20087777
Click OK to send this item home to PNB/BD.
Click Cancel if you do not have the item.
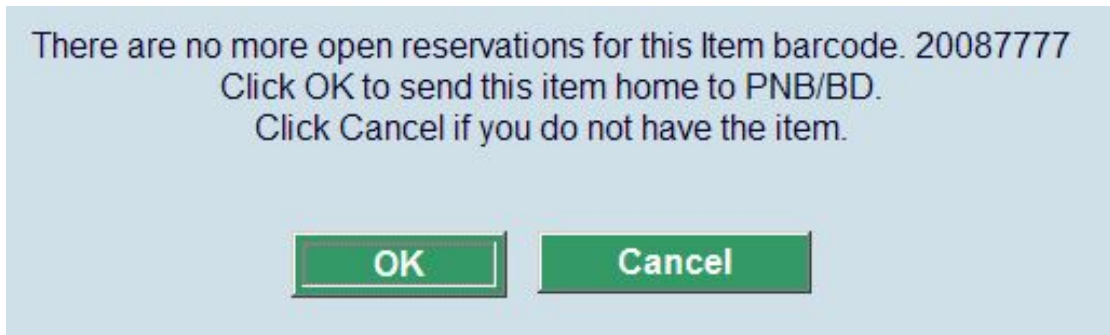
OK   Cancel

This message is indicating that there are no more reservations for the item. Click **OK** to send item item home if you have the item in hand. Click **Cancel** if you do not have the item.

If you clicked **OK** to send item item home then the item would be "In transit" to it's home location.

If you clicked **Cancel** because you do not have the item in hand, in AFO418 Reservations overview there will be an entry for this item "Cancelled - on reservation shelf". These entries the user would process later when they have the item in hand and would go to AFO418 – Picklist and trap the item to see where it should go next.

When viewed in AFO 423, the item may have a status of Reservation – Not trapped (Item is not on loan) if there are still open reservations on this item. If you click on **Reservation queue** here, you will see the additional information.

415.5 Item overview

After choosing this option an overview screen will be displayed:

Columns on the screen

Item: Barcode number for each item that could satisfy the reservation.

Status: The status of the item. Examples: on loan (indicated by due date), in transit to and from locations, on reservation shelf for another borrower, Not picked up by another borrower, on a picklist, etc.

Status date: Date when status changed so we can, for example, see when an item went into transit and when it arrives on the reservation available shelf.

Recall notice: Indication of whether a manual or automatic recall notice has been sent for the item. Date and time of this recall.

Owning Inst/Loc: Owning Location manager.

Managing Inst/Loc: Managing Location manager.

Options on the screen

Details: access to AFO 423 – Item detail

Cancel: deletes the entire reservation

Cancel item(s): deletes selected items from the reservation

Bib data: access to the full bibliographic record, in Read Only mode

Reservation queue: access to the reservations queue, in AFO 422.

415.6 Stack requests

When a borrower has placed stack requests, these will also be visible in the reservations overview. But these are different from regular reservations, as is explained below.

See the general help on stack requests for more information on the general principles.

415.6.1 Overview screen

Columns on the screen

Status: The status of the stack request. The following statuses are possible:

- **Available** - the request is available to be picked up

- **Cancelled** – request cancelled

- **Completed** – request completed

- **Held at issue desk** – the borrower returned the item and the item is held at the issue desk for further consultation

- **In process** – the request is in process

- **Issued** – the item is checked out by the requesting borrower

- **Pending** – the stack request was not yet confirmed by the library

- **Post-dated** – the stack material required for a future date

- **Reservation** – the requested item was not available so a reservation was placed for it

- **Returning to stacks** – the request completed and the item is returning to the home stack

- **Available for any requester** – the item is available on a first come first served base

- **Put into transit to other reading room** – the item was returned by the requesting borrower and it was put into transit to another reading room in order to fulfill a reservation

- **Available (not yet notified)** – the request is available at the reading room but the borrower was not notified yet

Category: The item material type.

Author: (part of) the author name as defined in !Author (Element/Group profile).

Title: (part of) the title as defined in !Title (Element/Group profiles). Includes volume if this is a volume level hold.

Available: For a stack request that is available to be picked up; the date / time at which the request will lapse from the reservation shelf if the reader doesn't collect it.

Notice created: The date/time when the borrower availability notice was sent.

Placed: The date on which the stack request was placed.

Active: The date on which the stack request will become active (this can be later than the date placed).

Expiry: The date after which Vubis will no longer attempt to satisfy the stack request.

Pickup at: The location at which the borrower will be able to pick up the stack request when it is available.

Type: Always "Stack".

Options on the screen

New: to add a new stack request for the current borrower.

Modify: to access the update stack request detail screen. See section 415.6.2 for details.

Cancel: this option is not valid for stack requests.

Item overview: to access the item overview screen

Print reservation notice: this option is not valid for stack requests.

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

Borrower: access to full borrower record, AFO 431.

415.6.2 Stack request details

Modify: to access the update stack request detail screen. A tabbed input form will be displayed:

Tab general

The General tab shows some overall details of the request. The information that is system generated or results from the transactions / history of the request is displayed in protected form.

Fields on the screen

Title: The title of the requested work (protected field).

Request status: The current status of the request. This is a multiline display since there may be several conditions worth reporting (protected field).

Alerts: Reserved for future use.

Request number: A system generated number.

Request date: The date and time that the request was entered.

Required by: The date for post-dated requests.

Reservation priority: This options allows you to assign a priority to a request which has been placed as a reservation (i.e. where there is a queue of requests). The lower the number the higher the priority. This field appears only if the parameter "Use reservation priorities" in AFO815 - System wide options is ON.
This is NOT related to reservations priority as described above for regular reservations.

Expiry date and **Expiry time**: A system calculated date/time. These are calculated from the expiry date/time/rule settings of the stack request code. If a 'reservation' request is created, the Reservation expiry period or Reservation expiry date field is used to calculate the Expiry date and Expiry time. Otherwise, the regular three fields are used.

Confirm request: For non-catalogued items, when entered either by staff or from the WebOPAC, the request is left in a "review" state, for staff checking.

Staff notes: For notes to staff.

Placed: The location, date / time and user ID details of request placement (protected field).

Request code: Determined from the borrower category (protected field).

Source of request: How the request was entered – this will be set to the value "WebOPAC" if entered that way, otherwise staff may select from the dropdown list
This may be used for reporting purposes.

Internal system record id: The internal record number (protected field).

Note

Depending on the status of the request, other fields may be protected as well.

Tab bibliographic

This tab shows the bibliographic details for the selected item and bib record. There are two variations on this display :

Catalogued items

In this case, the selected item may not be changed, once input but the current status is displayed here. Although, in such cases we expect the material to be monographic, the "volume" information possibly entered against the request initially is displayed and may always be amended.

Non catalogued items

This is much the same display – but for non-catalogued items. In this case, the pseudo item details are displayed and may be amended.

If the location details are amended, the system will cross-reference the route previously selected to ensure that it is consistent with the location details entered.

Note that the item category, assigned a default value when the request was entered initially may be changed.

Tab client

This tab holds the reader / borrower information, and some input fields relating to the reader aspects of the system.

In particular it displays the name and details of the reader. Additional changeable fields are:

Delivery location: The delivery location. This may be changed under very limited circumstances only.

Table id: A table if defined for the delivery location.

Use in library only: Notes that the item may only be used in the library.

Contact method: The preferred mechanism for any correspondence to the client. In addition to printing and/or emailing the relevant notices to the reader, it is also possible to indicate here that the availability of the request should be sent as a Text message.

Reader notes: A free text note field that will display to the reader in the WebOpac.

Charge to client: The charge for placing a stack request.
Once placed then the amount is NOT changeable.

Under very limited circumstances, the borrower initially entered may be changed, using the [Borrower] command.

Expected delivery date: An estimated date for delivery is calculated, based on the settings for the service point. This may change during the processing of the request.

Original expected delivery: The original calculation, based on the settings for the service point.

Blocked: If a borrower fails to collect requested items, then the system will create a "block" against their record, based on parameters in the Stack Request Code. This block will ONLY apply to the ability to place stack requests.

Additional tab Request source

This tab only appears when the request is for a non-catalogued item. This portion of the form is hidden for catalogued records. It represents the bibliographic data entered when the request was initially entered.

Data may be corrected at any time.

415.6.2.1 Buttons on the form

Action/event: When you click this button, an input form appears:
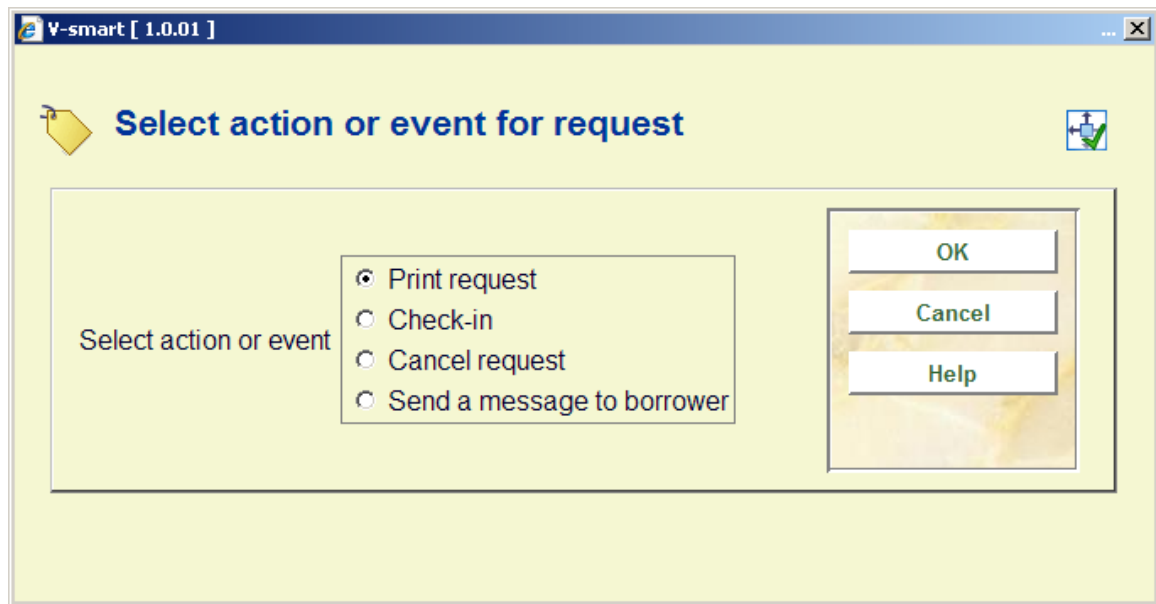
It allows the user to carry out specific actions on the request. These may sometimes be carried out by other methods. For example, the Action/Event button may be used to check-in an item, but this may also be executed from the regular AFO 412.

The Action/Event pops up an input form offering a variety of options. The options offered are sensitive to the current context of the request.
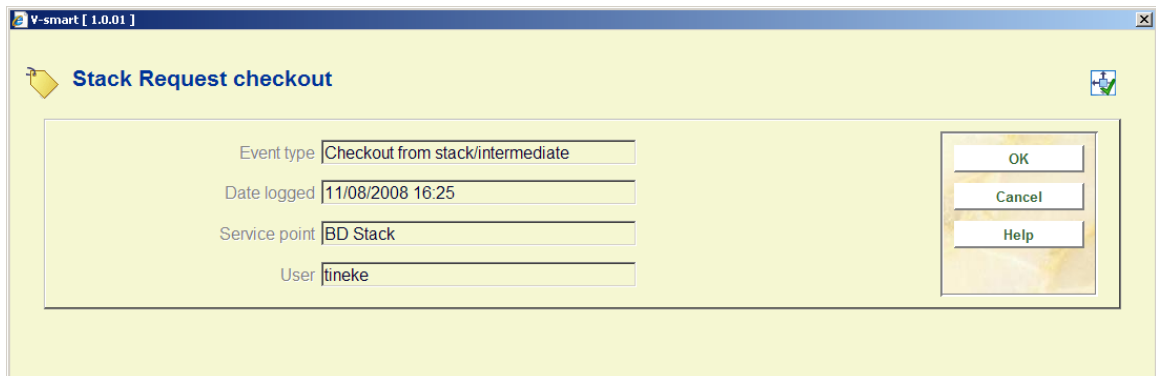
Possible actions are :

- Print or reprint the request

- Checkin the item/request

- Send a message to the reader

- Cancel the request

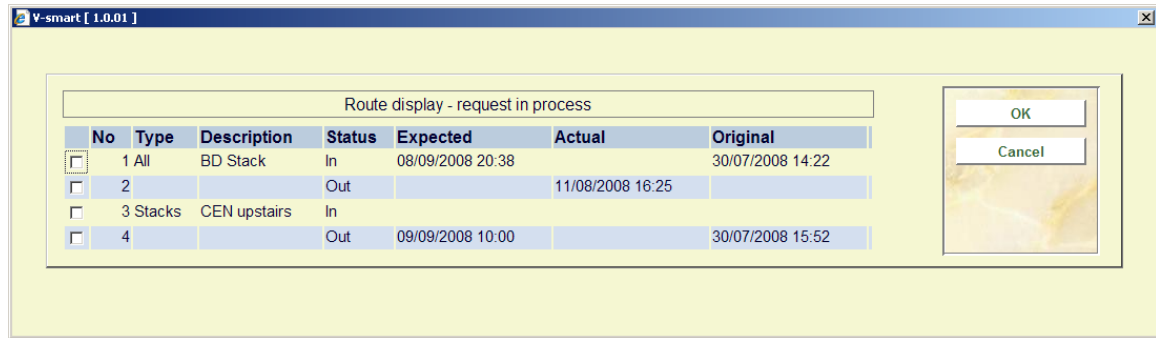- Clear the block for the current request

History: When you click this button, an overview screen appears:
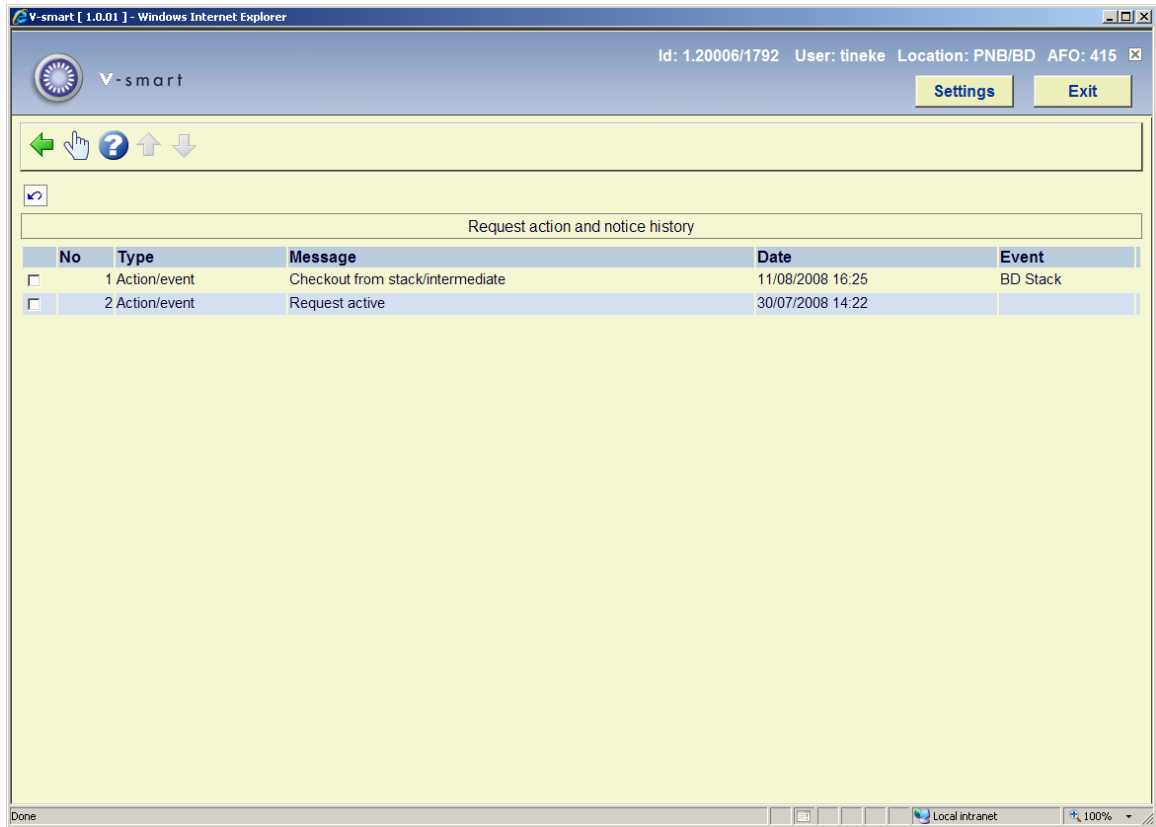
This displays a log of the key events in the lifecycle of the request. You can click on a line to get more details:

**Route**: When you click this button, an overview screen appears:

This gives an overview of the transfer of the item from stack location to the delivery point. This is for information purposes only.

415.6.3 Cancelling a request

Proceed as follows to cancel a request:

- select the request from the overview screen and use the option to **Modify** the details

- on the tabbed form that pops up, click the button **Action/Event**

- on the selection form that appears check **Cancel request** and click **OK**

An input form appears:

Fields on the form
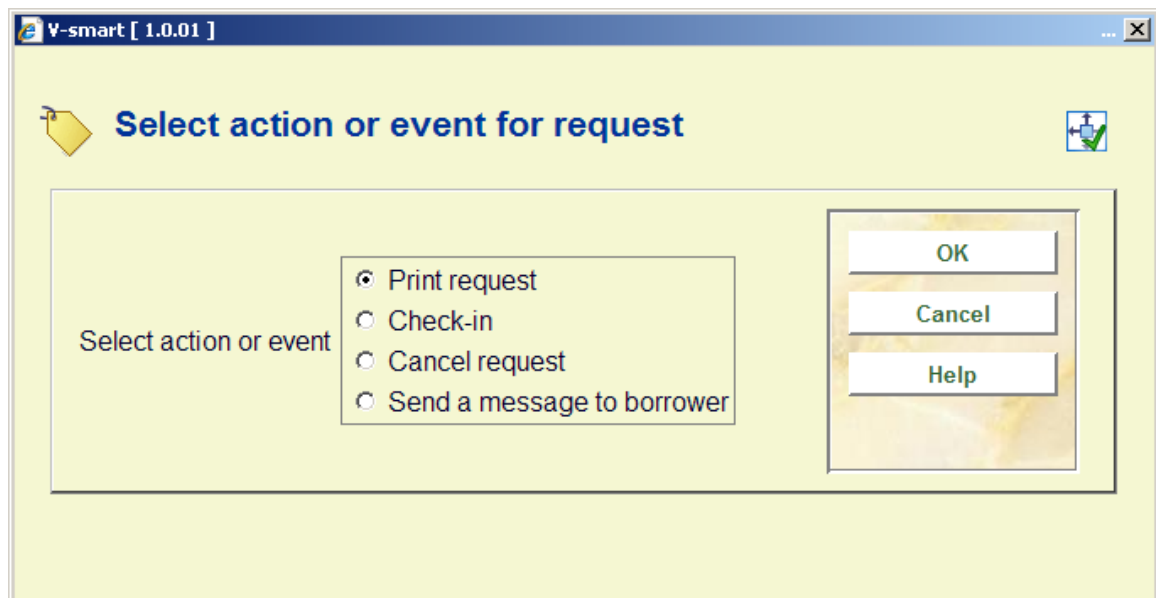
Cancellation code: Select a cancellation code from the dropdown list. These codes are defined in AFO 618 - Stack request cancellation codes.

Reader note: Free text field.

Staff note: Free text field.

Inform reader: Check this option when a cancellation notice must be sent to the reader.

Allow other reservations to capture this item: Check this option to tell the system to find the next request in the queue to activate. If not checked the item will just be returned.

Replace this request as a reservation: Check this option to tell the system to turn this request into a regular reservation. If not checked the item will just be returned.

Both of these are offered according to the context of the cancellation and may be suppressed.

The section at the bottom of the screen will give some guidance as to the status of the request and the resulting "action" on the request and item.

In certain situations, the workflow of the request is such that the cancellation cannot be acted upon immediately. The request is marked with a "pending cancellation" status, and the actual processing carried out at some intermediate point. For example, suppose the item is en-route from service point A to B; then the request is still "active" but the actual cancellation (and the actions this implies) is acted on when the item is next physically "visible" to the system (for example, when the request is checked-in at the reading room).

415.7 Interlibrary Loan requests

When a borrower has placed ILL requests, these will also be visible in the reservations overview. But these are different from regular reservations, as is explained below.

See the general help on this subject for background information, the help of AFO 822 for parameter information and the help of AFO 821 for practical information.

Columns on the screen

Status: The status of the ILL request. The following statuses are possible:

- Available for return

- Cancellation requested

- Cancelled

- Complete

- Conditions - reply needed

- Expired

- In process

- Lost

- New or incomplete request

- Not supplied

- On loan

- Changed to an order

- Pending

- Under consideration as an order

- Recalled

- Received

- Renew requested

- Renewed

- Changed to a reservation

- Returned

- Sent - in process

- Shipped

Category: Either Loan or Copy.

Author: The ILL request number.

Title: (part of) the title, either from the Request tab or the Bibliographic tab.

Available: The date on which the ILL request became available for pickup.

Notice created: The date on which an availability notice has been printed. The ILL request is available for pickup and the notice was printed on the date shown.

Placed: The date on which the ILL request was placed.

Active: Not relevant for ILL requests.

Expiry: Not relevant for ILL requests.

Pickup at: The location at which the borrower will be able to pick up the ILL request.

Type: Always"Interlibrary Loan".

Options on the screen

New: not valid for ILL requests.

Modify: to access the update ILL request detail screen. See the help of AFO 821 for details.

Cancel: this option is not valid for ILL requests.

Item overview: this option is not valid for ILL requests.

Print reservation notice: this option is not valid for ILL requests.

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

Borrower: access to full borrower record, AFO 431.

- **Document control - Change History**

Version	Date	Change description	Author
1.0	May 2008	creation	
1.1	September 2008	updates for stack requests	
2.0	June 2009	new options: to see position in queue; to change pickup location after item is trapped; reservation priorities part of 2.0 updates	
3.0	August 2010	new fields on stack request forms; minor wording changes; chapter on ILL requests part of 2.0.06 updates	