

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 AFO's 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;
- AFO 421 ('Place reservations') to register a reservation;
- AFO 422 ('Reservation queues') to modify the queue position of reservations;
- 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.

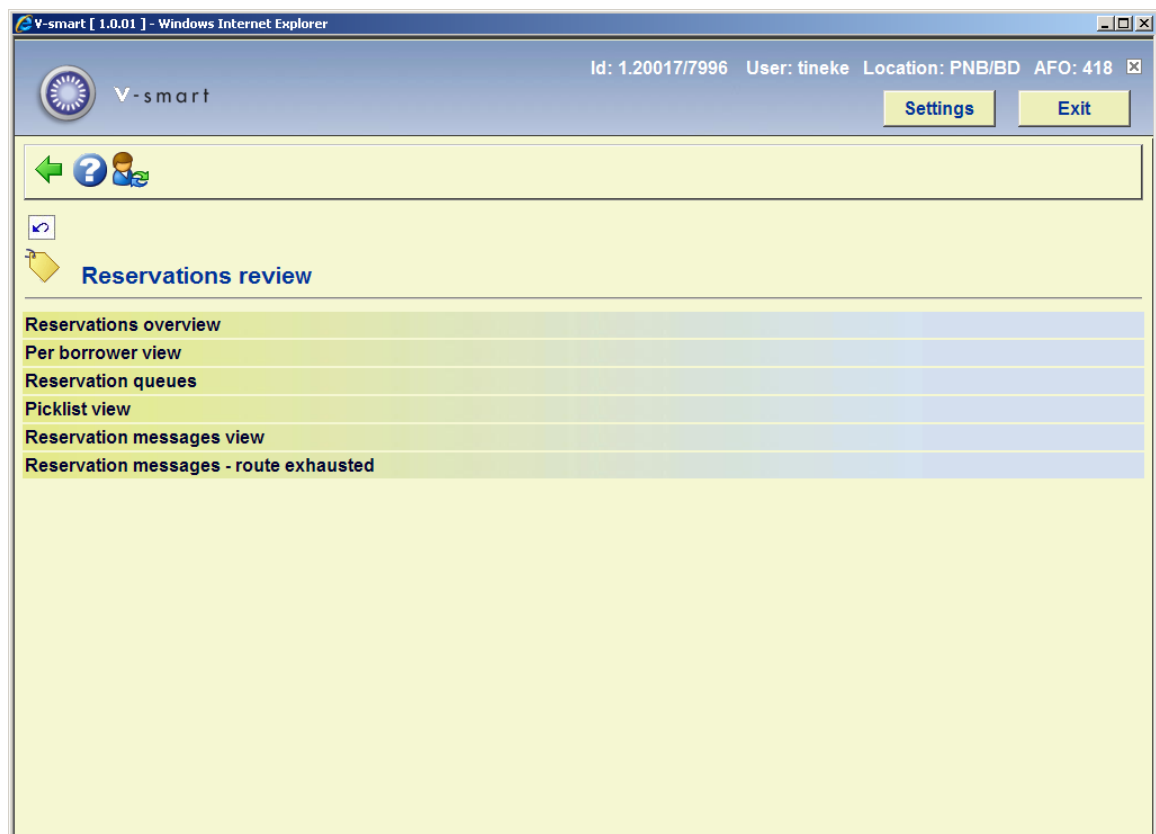
The following statuses are possible:

- **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:



The menu options are described in the next sections.

418.3 Reservations overview

After choosing this option an overview screen will be displayed:

Sorted by
Filtered by
Showing 162 out of 162

Reservations overview

No	Borrower's name	Borrower's barcode	Title	Pickup location	Status
<input type="checkbox"/>	1 Jong, JCW de	00021048	Beyond the Farthest Star	PNB/BD	Open
<input type="checkbox"/>	2 Gaal, HJC van	00006957	Disney, the lion king	PNB/BD	On picklist
<input type="checkbox"/>	3 Klaphake VCM	00007161	A Connecticut Yankee in K	PNB/BD	Available for pickup
<input type="checkbox"/>	4 Woesik, W. van	00007203	Wolfman MC Jack	PNB/BD	Not picked up
<input type="checkbox"/>	5 Jansen, C	00010454	Tineke's second test titl	PNB/BRA	PNB/BD -> PNB/BRA
<input type="checkbox"/>	6 Albers, LS	00011031	Bolo brigade	PNB/BD	Not picked up
<input type="checkbox"/>	7 Jansen, A.E.M.	00020867	Beyond the Farthest Star	PNB/BD	Expired
<input type="checkbox"/>	8 Vries, AW de	1179	Test éléphant mañana mar1	PNB/CEN	Not picked up
<input type="checkbox"/>	9 MACLEOD	123123111	Star child	PNB/BD	Not picked up
<input type="checkbox"/>	10 MACLEOD	123123111	The seer king with shelfm	PNB/WP	Open
<input type="checkbox"/>	11 MacLeod, Debbie I work in WebOpac Firstname	88971	Journal of Life v.2003.no.1.pt.9	PNB/BD	Not picked up
<input type="checkbox"/>	12 MacLeod, Debbie I work in WebOpac Firstname	88971	Disney, the lion king	PNB/CEN	Not picked up
<input type="checkbox"/>	13 Revell, Frances Mary	200200001	À côté de chez Frances	PNB/SCH	Not picked up
<input type="checkbox"/>	14 Revell, John	200200002	Reservation priorities -	PNB/BD	Expired
<input type="checkbox"/>	15 Revell, Anne	20040010	Blank or blank or Trial '	PNB/CEN	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.

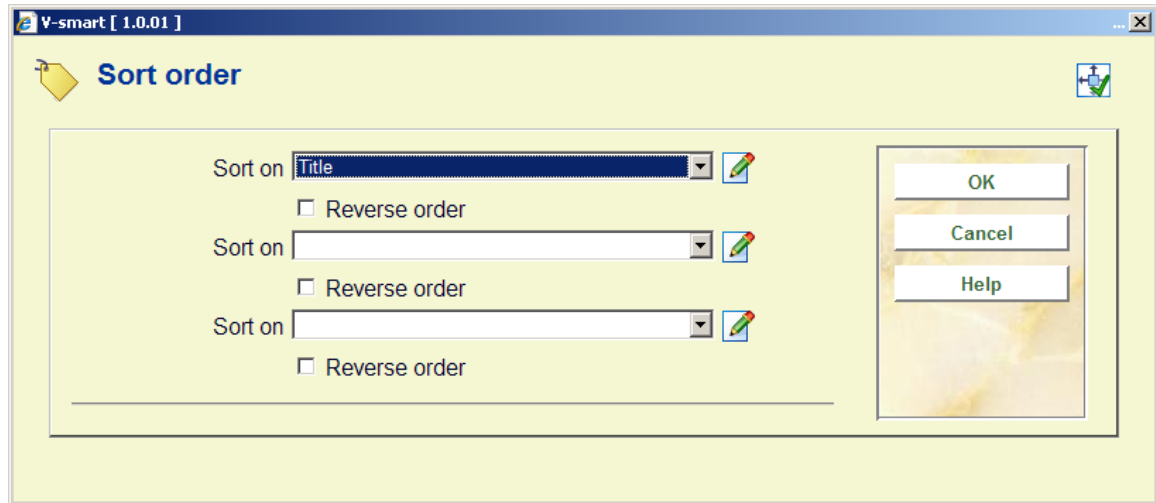
Sort: changes the sort criteria. See section 418.3.1.

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

Jump to screen: to go to a specific place in the list. See section 418.3.3.

418.3.1 Sort

After choosing this option the following form will be displayed:



The screenshot shows a window titled "V-smart [1.0.01]" with a yellow background. The window contains a "Sort order" dialog box. The dialog box has a title bar with a yellow folder icon and the text "Sort order". Inside the dialog, there are three "Sort on" dropdown menus. The first dropdown menu is set to "Title". Below each dropdown menu is a checkbox labeled "Reverse order". To the right of the dropdown menus are three buttons: "OK", "Cancel", and "Help".

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 screenshot shows a web browser window titled "V-smart [2.0.01] -- Webpage Dialog" displaying a "Filter" form. The form has a yellow background and contains several input fields and a status list. The input fields are: "Reservation placed after", "Reservations placed before", "Borrower's home location", "Borrower's placed location", "Borrower's pickup location", and "Item's owner location". Below these is a "Status" list with the following items: "Available for pickup", "Cancelled - on reservation shelf", "Expired", "In transit", "Not in stock-expired", "Not in stock-open", and "Not in stock-pending". At the bottom left of the form is a "Save filter" checkbox. On the right side, there is a vertical panel with four buttons: "OK", "Cancel", "Help", and "Clear all". The browser's address bar shows the URL "http://nlbawqavubis/sm200qa/ClientBody.csp?ClientId=1.23001" and the status bar shows "Local intranet".

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.)
- only items for a specific *owner* location

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).

When the option **Save filter** is NOT checked, then the filter will be cleared once the user leaves the overview screen. Otherwise it remains in effect, even when you come back after having logged out.

418.3.3 Jump to screen

Jump to screen: after selecting this option, a form is displayed:

The screenshot shows a web browser window titled "V-smart [2.0.01] -- Webpage Dialog". The main content area is a "Search list" dialog box. It features a search form with the following fields and options:

- Search criteria fields: "No", "Borrower's name", "Borrower's barcode", "Title", "Pickup location", "Status", and "Any text".
- Options: "Match case" and "Continue from current page", both with unchecked checkboxes.
- Navigation fields: "Jump to row (1-339)" and "Jump to page (1-12)".
- Action buttons: "OK", "Cancel", and "Help" on the right side.

The browser's status bar at the bottom displays the URL "http://nlbawqavubis/sm200qa/ClientBody.csp?ClientId=1.23001" and "Local intranet".

It allows you to go directly to the screen containing the criterion entered on this form. You can enter multiple criteria.

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 viewing a reservation queue is offered, as in AFO 422.

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.

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	Pickup Loc.	Res.	Item category	Last return date	Activation date
1	Merge test aug 12	Allison, John	986555	BD F Arm	PNB/WP	1	FS (Floating Stock)		24/07/2009
2	The lost years [Comic] / J.M. Dillard	Dillard, J.M.	1533333	BD MC 15	PNB/SCH	1	CDR (CD-ROMs)		25/05/2009
3	The lost years [Comic] / J.M. Dillard	Dillard, J.M.	1544444	BD MC 15	PNB/SCH	1	CDR (CD-ROMs)		25/05/2009
4	The lost years [Comic] / J.M. Dillard	Dillard, J.M.	1555555	BD MC 15	PNB/SCH	1	CDR (CD-ROMs)		25/05/2009
5	The lost years [Comic] / J.M. Dillard	Dillard, J.M.	1566666	BD MC 15	PNB/SCH	1	CDR (CD-ROMs)		25/05/2009
6	The lost years [Comic] / J.M. Dillard	Dillard, J.M.	1577777	BD MC 15	PNB/SCH	1	CDR (CD-ROMs)		25/05/2009
7	Alice in numberland : a students' guide to the enjoyment of higher mathematics / John Baylis, Rod Haggarty.	Baylis, John	686878	BD DM QA 1862	PNB/WP	1	BO (Books)		14/08/2009
8	Alice in numberland : a students' guide to the enjoyment of higher mathematics / John Baylis, Rod Haggarty.	Baylis, John	686879	BD DM QA 1862	PNB/WP	1	BO (Books)		14/08/2009
9	Disney, the lion king		31380000003896	CEN Libs Barcode format	PNB/WP	3	FS (Floating Stock)		29/07/2009
10	Disney, the lion king		31380000004043	CEN Libs Barcode format	PNB/WP	3	FS (Floating Stock)		29/07/2009
11	Disney, the lion king		554456	BD CheckSDI global	PNB/BD	2	YB (Year books)		30/09/2009
12	This is the book [Book]		200912345	BD [CFLY] To be catalogued - c-fly	PNB/BD	1	BO (Books)	14/05/2009	31/08/2009
13	Reservation priorities - demo 1		39999RPDEMO1	BD [DEBS] QA123	PNB/BD	2	MAP (Maps)		11/05/2009
14	Reservation priorities - demo 1		39999RPDEMO2	BD [DEBS] QA123	PNB/BD	2	MAP (Maps)		11/05/2009
15	JUNE 30 TEST 2		39999JUNE30-1	BD PHOEBEJUNE30-1	PNB/BD	1	ANN (Annual reports)		24/07/2009

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.

Columns on the screen

Title: The title of the work.

Author: The author of the work.

Item: The barcode of an item that is available to be trapped to satisfy the reservation.

Shelfmark: The shelfmark of the item.

Pickup loc.: The pickup location as it was entered on the reservation.

Res.: The number of reservations outstanding for the title.

Item category: The item category.

Last return date: The date the item was last returned.

Activation date: The date the reservation was activated.

Options on the screen

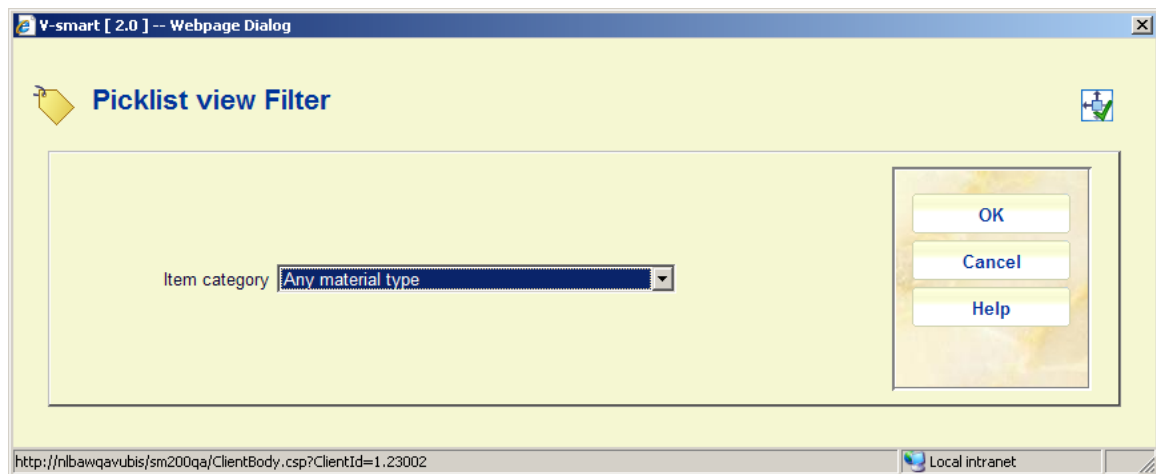
Select: this takes you to an overview of the selected reservation. From this screen you can view the details (as in AFO 415) or go to the reservations queue (as in AFO 422).

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.

Show full bibliographic record: gives access to the full bibliographic record in Read Only mode.

Filter: to limit the display to a certain item category (only categories shown on screen are available in the dropdown list):



Trap reservations: 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).

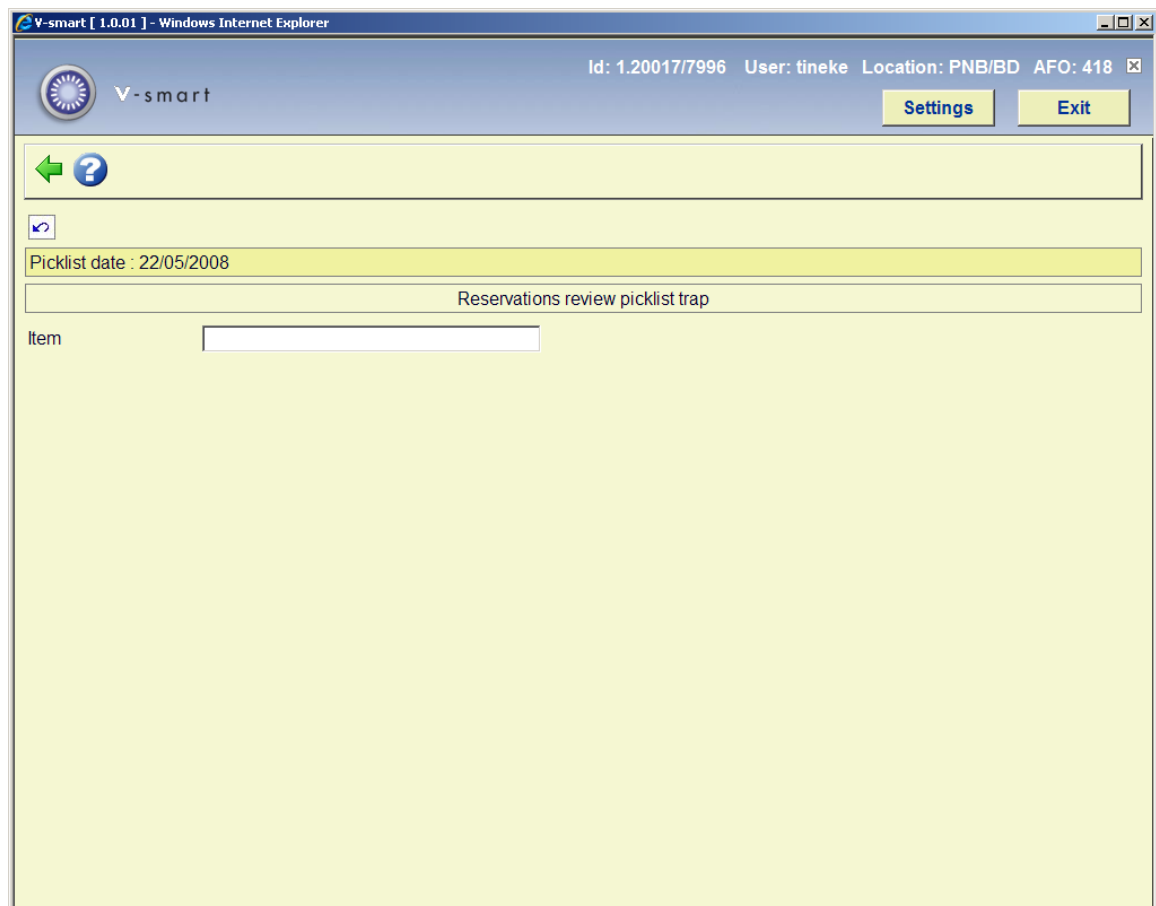
Export savelist: With this option you can generate a special savelist which can then be used to compare with items on the shelves (stocktaking). See the help of AFO 424 for an introduction.

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 reservations**.

The Picklist trap reservations screen is displayed:



The screenshot shows a web browser window titled "V-smart [1.0.01] - Windows Internet Explorer". The page header includes the V-smart logo, the text "V-smart", and user information: "Id: 1.200177996 User: tineke Location: PNB/BD AFO: 418". There are "Settings" and "Exit" buttons in the top right. Below the header is a navigation bar with a green left arrow and a blue question mark icon. A yellow bar displays "Picklist date : 22/05/2008". The main content area is titled "Reservations review picklist trap" and contains a form with a label "Item" and an empty text input field.

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.

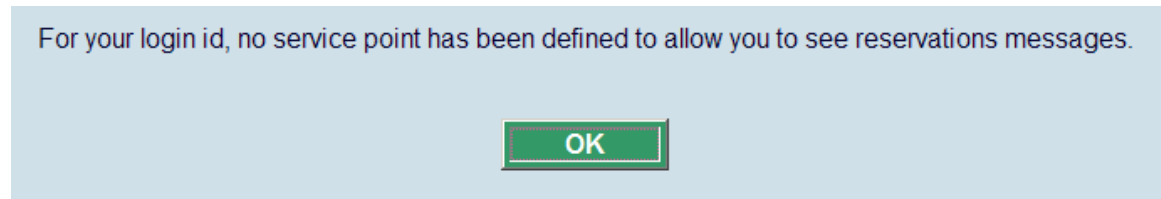
Return to the Reservation review – picklist screen. The items should no longer be on the list.

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.

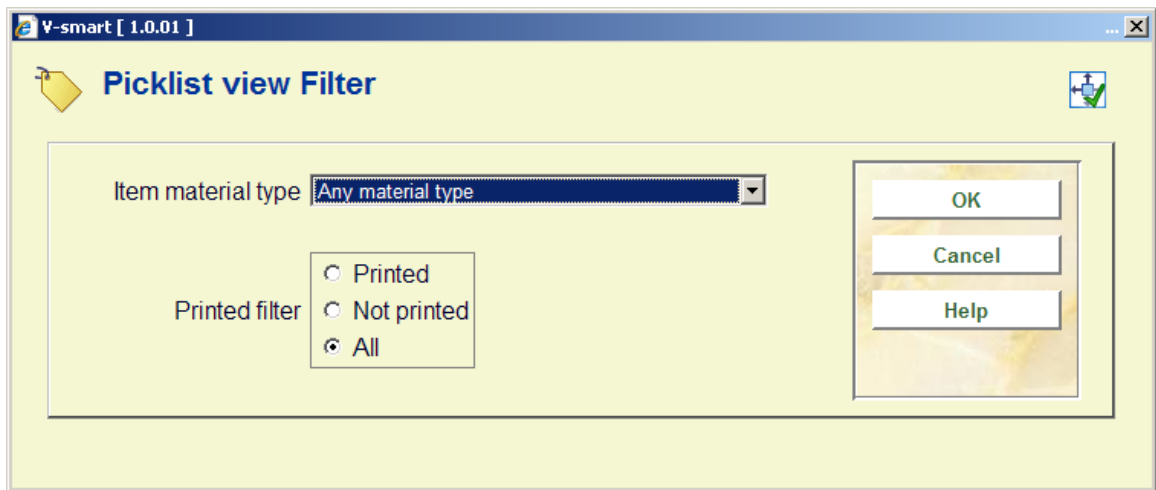
The reservations message view of the picklist is very similar to the regular picklist view.



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.

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



- The printing option allows for the printing of one or more selected lines.

By selecting 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 selecting the **Reservation queue** option.

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:

V-smart [1.0.01] - Windows Internet Explorer

V-smart Id: 1.20035/11024 User: tineke Location: PNB/BD AFO: 418

Settings Exit

Sorted by Title
Filtered by
Showing 5 out of 5

Reservations overview - messages for which the route has been exhausted

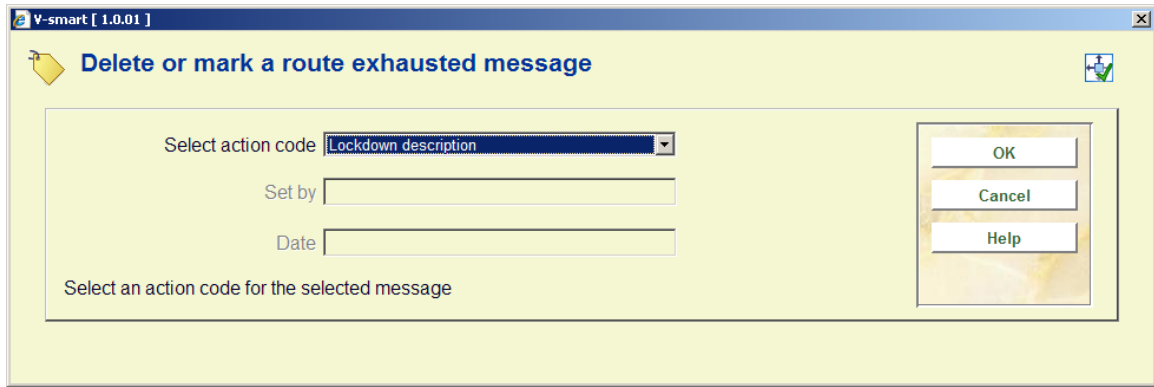
No	Borrower's name	Borrower's barcode	Title	Pickup location	Status
<input type="checkbox"/> 1	Oxley, Erica	200621461	English social history	PNB/BD	Expired
<input type="checkbox"/> 2	Oxley, Carla	20062087X	Epidemics and history :	PNB/BD	Expired
<input type="checkbox"/> 3	MACLEOD	123123111	Geac is a multinational c	PNB/BD	Expired
<input type="checkbox"/> 4	Pietjouw, C.H.C.	00012690	The Magic Kingdom of Land	PNB/BD	Expired
<input type="checkbox"/> 5	Walker, Huw Alexander	900024441	Red sectorS	PNB/BD	Expired

This displays a list of reservations for which all the branches on the route list have been contacted and for which the messaging has gone around the loop the required number of times. Reservations in this state are displayed for which the placing location is the same as the current location for the workstation.

The display is identical to that for the reservations overview (see section 4.17.3), except that the **Filter** option has been cut down to reflect the more limited range of sensible choices. In addition an option to display ALL reservations in this state, regardless of the current location is offered.

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:



Fields on the screen

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

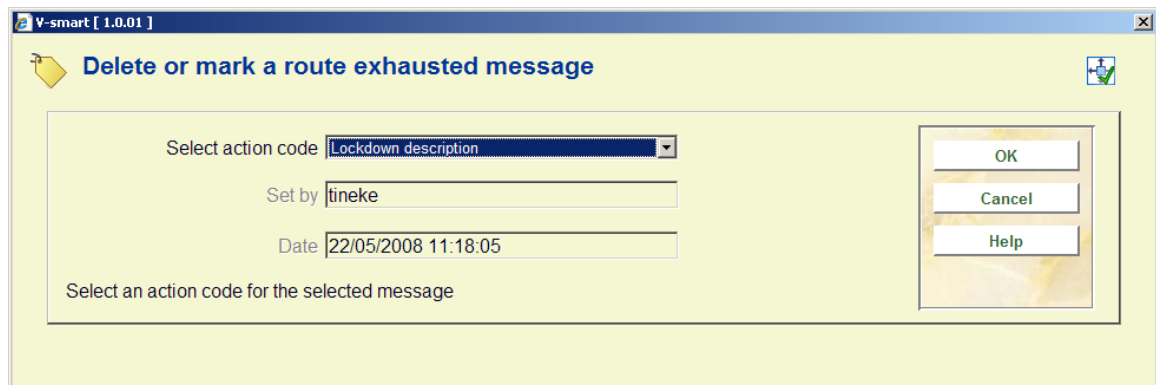
Set by: entered by the system (see below).

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.

No	Borrower's name	Borrower's barcode	Title	Pickup location	Status
<input checked="" type="checkbox"/> 1	Oxley, Erica	200621461	English social history	PNB/BD	Expired
<input type="checkbox"/> 2	Oxley, Carla	20062087X	Epidemics and history :	PNB/BD	Expired
<input type="checkbox"/> 3	MACLEOD	123123111	Geac is a multinational c	PNB/BD	Expired
<input type="checkbox"/> 4	Pietjouw, C.H.C.	00012690	The Magic Kingdom of Land	PNB/BD	Expired
<input type="checkbox"/> 5	Walker, Huw Alexander	900024441	Red sectorS	PNB/BD	Expired

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:



The screenshot shows a dialog box window titled "V-smart [1.0.01]" with a yellow background. The main title of the dialog is "Delete or mark a route exhausted message". Inside the dialog, there is a form with the following fields:

- "Select action code" with a dropdown menu showing "Lockdown description".
- "Set by" with a text input field containing "tineke".
- "Date" with a text input field containing "22/05/2008 11:18:05".

Below the form, there is a label "Select an action code for the selected message". On the right side of the dialog, there are three buttons: "OK", "Cancel", and "Help".

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**

Version	Date	Change description	Author
1.0	May 2008	creation	
2.0	June 2009	new (filter) options on overview screen; new columns and option on picklist screen; textual improvements part of 2.0 updates	