

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.

Apart from placing reservations, this AFO can also be used for placing stack requests. See the [general help](#) on stack requests for more information on the general principles.

421.2 Initial steps

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.

The screenshot shows a web browser window titled "V-smart [1.0.02] - Windows Internet Explorer". The page header includes "Id: 1.20001/5536 User: tineke Location: PNB/BD AFO: 421" and buttons for "Exit" and "Settings". Below the header is a navigation bar with various icons. The main content area is titled "Reservations - document '2.391'" and contains a table with two main sections:

No.	Label	Data
<input type="checkbox"/>	1 Bibliographic description	<p>Author: Auteur, A Anderson, Poul Beyond the Farthest Star Eindhoven, 2002 ISBN: 123456789X Internal Bibliography/Index note: Samenvatting van deze titel Genre: Science fiction</p>
<input type="checkbox"/>	2 Status / Shelfmarks	<p>No items in stock: BD No items currently available for loan: BD F BEY Not for loan: BD QA12345 No items currently available for loan: BD QA543 No items in stock: BD TEST2 Item available: BD Youth Fiction 1 F BEY Not for loan: BD Magazijn QA 123 No items currently available for loan: BD frances No items currently available for loan: BRA kast 456 No items in stock: CENTRAL LIBRARY frances No items currently available for loan: CENTRAL LIBRARY kast 123</p>

Options on the screen

View data: If you select block 1 and this option, the bibliographic record will be displayed in read-only mode. If you select block 2 and this option, you will see the holdings information.

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**. for block 2. See section 421.2.1.

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 takes you to the screen where you can place stack requests. See section 421.4.

Item transfer history: this option relates to Circulating Stock. See the Help on this subject for more information.

421.2.1 Holdings information

After selecting block 2 and the option **View data** or selecting the option **Holdings information** a summary screen will be displayed:

The screenshot shows a web browser window titled 'V-smart [1.0.02] - Windows Internet Explorer'. The page header includes the user ID '1.20001/5536', the user name 'tineke', the location 'PNB/BD', and the AFO number '421'. There are 'Exit' and 'Settings' buttons. Below the header, there are navigation icons (back, home, help, forward, refresh) and a search icon. The main content area displays the following information:

Author: Auteur, A.
 Anderson, Poul
 TitleBang: Beyond the Farthest Star
 Imprint: Eindhoven, 2002
 ISBN: 123456789X

Below this is a table titled 'Holdings information' with the following columns: No., Item, Shelfmark, Availability, Impression, Item data, Reservations, Loans this year, Total loans, Volume, and On loan to.

No.	Item	Shelfmark	Availability	Impression	Item data	Reservations	Loans this year	Total loans	Volume	On loan to
<input type="checkbox"/>	1 3999042	BD F BEY	08/01/2009			0	0	1		Jansen, A.E.M.
<input type="checkbox"/>	2 399992111	BD F BEY	02/02/2009			0	0	1		Jansen, B.E.M.
<input type="checkbox"/>	3 00000048	BD F BEY	In transit			0	0	2		
<input type="checkbox"/>	4 39993211	BD QA12345	Not available for loan			0	0	0		
<input type="checkbox"/>	5 39993222	BD QA12345	Not available for loan			0	0	0		
<input type="checkbox"/>	6 3999321	BD QA543	In transit			0	0	0		
<input type="checkbox"/>	7 399954554	BD Youth Fiction 1 F BEY	-	3rd		0	0	0		
<input type="checkbox"/>	8 32122	BD MAG QA 123	Not available for loan			0	0	1		
<input type="checkbox"/>	9 200200001	BD frances	In transit			1	0	7		
<input type="checkbox"/>	10 20020013	BRA kast 456	In transit			1	0	1		
<input type="checkbox"/>	11 20020012	CENTRAL LIBRARY kast 123	Request in progress at CENupstairs			1	0	4		

Columns on the screen

Item: the item barcode.

Shelfmark: the shelfmark details of the item.

Availability: this can either be a status (e.g. 'In transit', 'Reserved', etc.), a due date (when the item is out on loan), a dash(-) denoting 'nothing special' for this item or the indication the item is not for loan.

Impression: additional item information.

Item data: additional item information.

Reservations: the number of reservations and/or stack requests for the item.

Loans this year: the total number of loans for the current year.

Total loans: the grand total (historical) of number of loans.

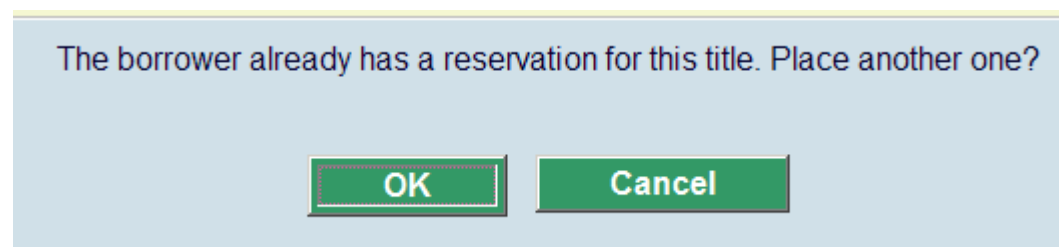
Volume: the volume information (only for multipart items).

On loan to: the name of the current borrower (dependant on the setting of the related parameter in AFO 469 – Miscellaneous).

421.3 Place reservation

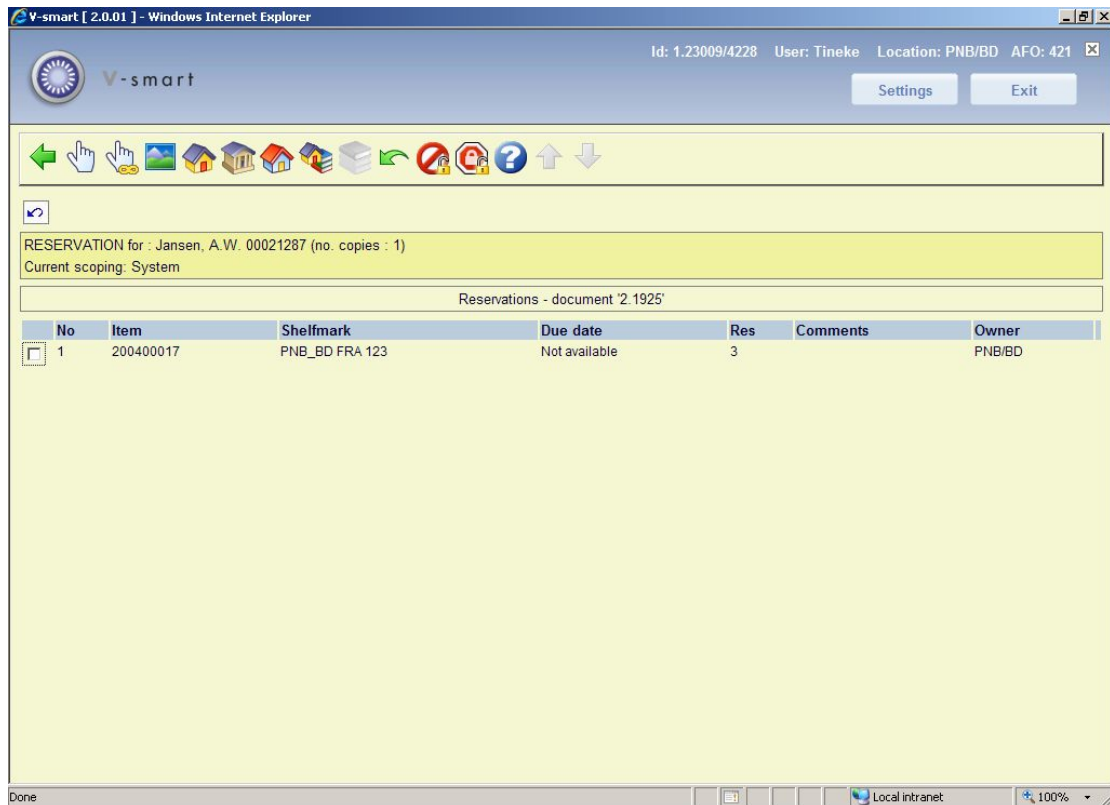
After you have chosen **Place reservation** you must first identify a borrower. See the Help for AFO 431 for all options to identify a borrower.

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 or 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 locations 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 shelfmarks 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.

If the shelfmark already contains a comma, this will not 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.

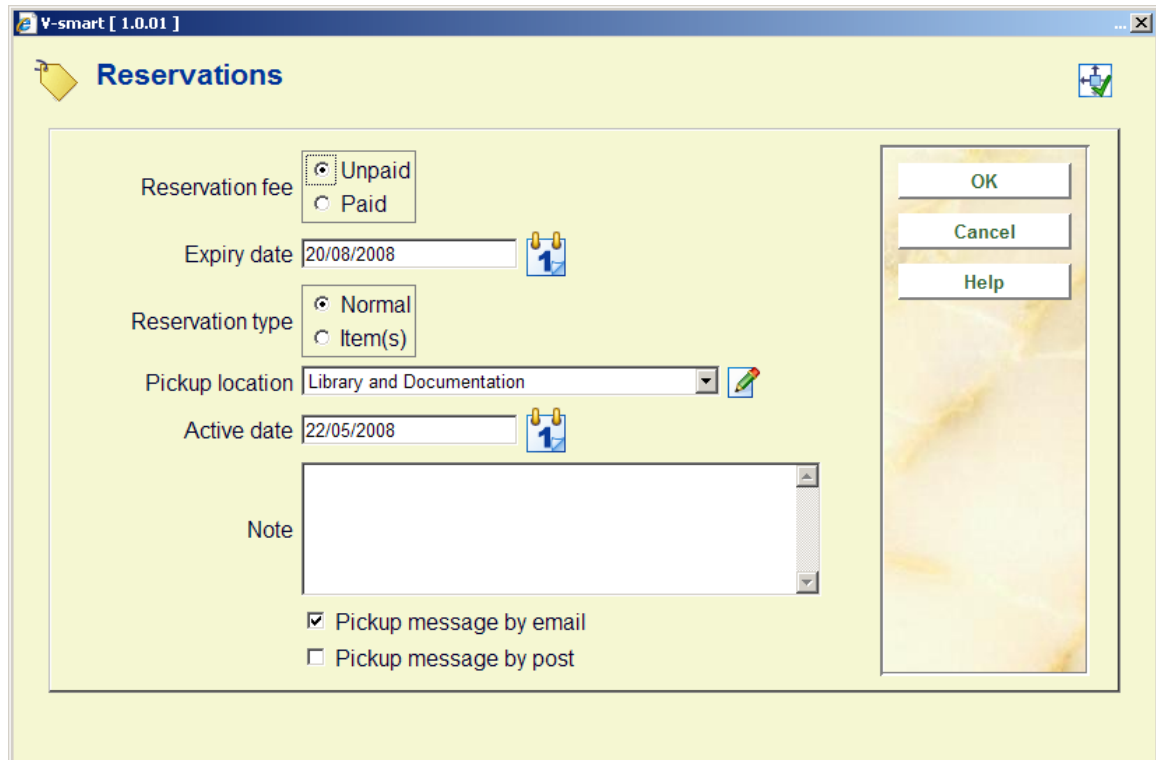
If you place a reservation through AFO 421, items at offline locations (as defined in AFO 461) will show as non-reservable and will *not* be picked up by the reservation unless you use the

option to Override restrictions.

You can't place a reservation on an item at an offline location manager through the WebOpac.

421.3.2 Placing the reservation

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



The screenshot shows a window titled "V-smart [1.0.01]" with a "Reservations" form. The form includes the following fields and options:

- Reservation fee:** Radio buttons for "Unpaid" (selected) and "Paid".
- Expiry date:** Text field containing "20/08/2008" with a calendar icon.
- Reservation type:** Radio buttons for "Normal" (selected) and "Item(s)".
- Pickup location:** Dropdown menu showing "Library and Documentation" with a search icon.
- Active date:** Text field containing "22/05/2008" with a calendar icon.
- Note:** A large empty text area.
- Message options:** Checkboxes for "Pickup message by email" (checked) and "Pickup message by post" (unchecked).

On the right side of the form, there are three buttons: "OK", "Cancel", and "Help".

Fields on the screen

Reservation fee: determine if reservation fee must be paid now (Paid) or at time or at time of pickup (Unpaid). Only applicable if you use reservation fees.

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 – Contact methods & 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:

The screenshot shows the V-smart library system interface in a Windows Internet Explorer browser window. The title bar reads "V-smart [1.0.01] - Windows Internet Explorer". The main header area includes the V-smart logo, the text "V-smart", and user information: "Id: 1.20044/11820 User: tineke Location: PNB/BD AFO: 421". There are "Settings" and "Exit" buttons. Below the header is a navigation bar with icons for back, home, refresh, print, help, and search. The main content area shows a reservation queue for the title "Vulcan's Heart / Josepha Sherman; Susan Shwartz / Joseph, Sharman". The table below is titled "Modify reservation queue".

No	Borrower	Name	Date placed	Pickup point	Active date	Expiry date	Status
<input type="checkbox"/> 1	00010454	Jansen, C	19/05/2008 - 15:01:20	PNB/CEN	19/05/2008	17/08/2008	PNB/BD -> PNB/CEN (200888888)
<input type="checkbox"/> 2	900006276	Wild, G.J. de	21/05/2008 - 11:10:08	PNB/BD	21/05/2008	19/08/2008	On picklist (200800014)
<input type="checkbox"/> 3	200500006	Jansen, Chantal	22/05/2008 - 12:13:51	PNB/BD	22/05/2008	20/08/2008	Open (200800014)

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

421.3.3 Reservation priorities

It is possible to assign a priority level to reservations in addition to an activation date. All active priority 1 reservations should be satisfied before all active priority 2 reservations and so on. The system supports 5 priority levels.

Please contact Infor if you want to use this functionality, because the 'in use' parameter cannot be set interactively.

When this functionality is in use, an additional field will be displayed on the input form for placing a reservation:

Reservations

Reservation fee Unpaid
 Paid

Expiry date 20/01/2010

Reservation type Normal
 Item(s)

Pickup location Library and Documentation

Active date 22/10/2009

Note

Pickup message by post

Pickup message by telephone

Reservation priority 1 - emergencies

OK
Cancel
Help

http://nlbawqavubis/sm200qa/ClientBody.csp?ClientId=1.23001 Local intranet

The 5 priority levels are defined using an Authority list (AFO 482 – Borrower authority lists) so that the library can determine the descriptions for each priority level. The priority with the lowest number (1) has the highest priority. For example,

- 1 = emergencies
- 2 = fast track reservations
- 3 = standard
- 4 = low priority
- 5= staff

The parameter AFO 481 – Reservations – Default priority by borrower category, is used to define a default priority for each borrower category. This *default priority* setting can be modified when reservations are created in AFO 421.

This default priority is also assigned to reservations created through the WebOpac. If no default is set, WebOpac reservations will be created with a priority of 0 and will be of the highest possible priority.

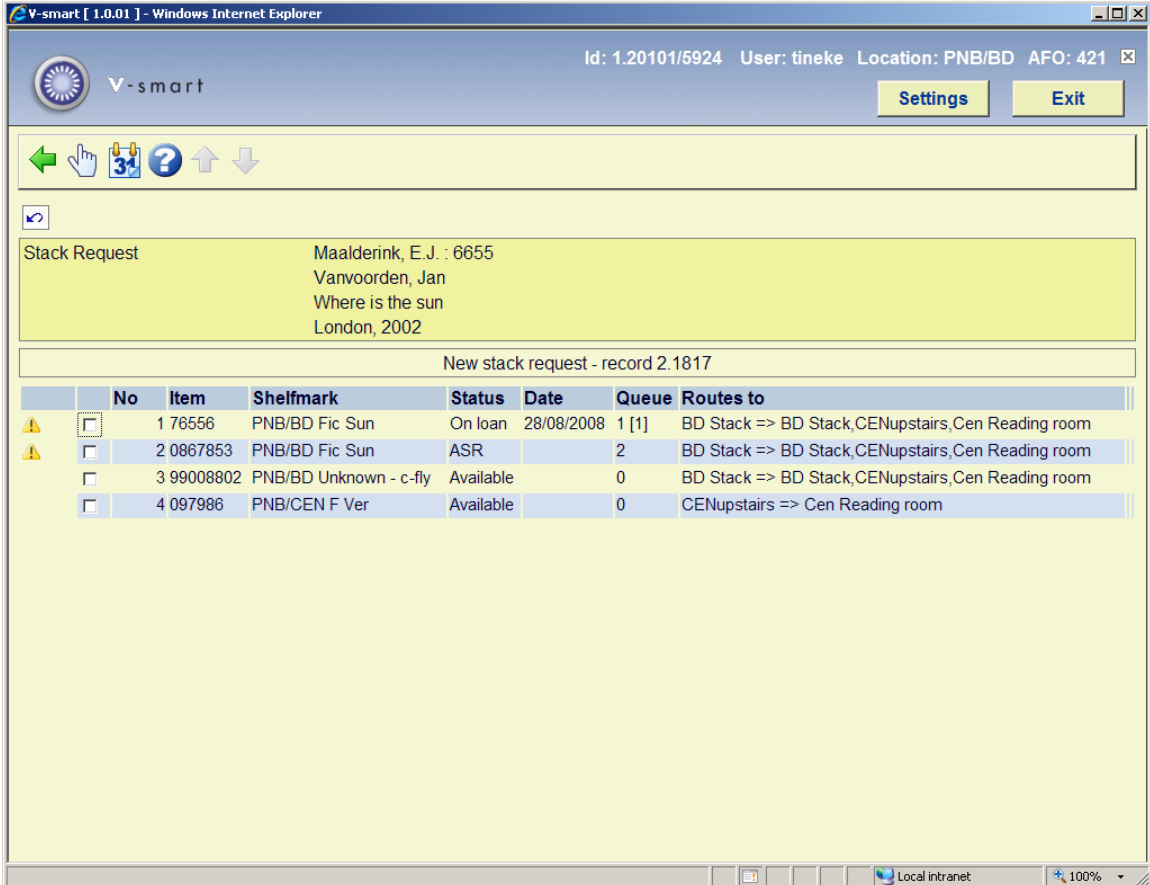
It is possible to assign separate reservation fees for each priority code via AFO 481 – Reservations – Reservation terms and fees.

421.4 Stack requests

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

421.4.1 Overview screen

After identifying the borrower, an overview screen is displayed:



The screenshot shows the V-smart web application interface. At the top, the user is identified as 'tineke' at 'PNB/BD' with 'AFO: 421'. The main content area displays a 'Stack Request' for 'Maalderink, E.J. : 6655 Vanvoorden, Jan Where is the sun London, 2002'. Below this, a table titled 'New stack request - record 2.1817' lists the following items:

No	Item	Shelfmark	Status	Date	Queue	Routes to
1	78556	PNB/BD Fic Sun	On loan	28/08/2008	1 [1]	BD Stack => BD Stack,CENupstairs,Cen Reading room
2	0867853	PNB/BD Fic Sun	ASR		2	BD Stack => BD Stack,CENupstairs,Cen Reading room
3	99008802	PNB/BD Unknown - c-fly	Available		0	BD Stack => BD Stack,CENupstairs,Cen Reading room
4	097986	PNB/CEN F Ver	Available		0	CENupstairs => Cen Reading room

This displays the stack items available, including those with a loan status, such as On loan.

The header pane shows the name and barcode of the selected reader; followed by brief bibliographic details, as defined in the Element Group setting “!Reservation” for the format of the record.

Columns on the screen

Item: the barcode number

Shelfmark: the full location of the item

Status: the current status of this item

Date: a date relevant to the current status.

Queue: the number of active requests on this item

Routes to : displays the available reading rooms (delivery locations) for an item from this location. If there exists more than 1 route, then an appropriate one will be shown followed by the text “+ 4 others”. The location displayed will be the location of the current terminal if this matches, or otherwise it will be the first found (to all intents and purposes, random).

See section 421.4.4 for placing requests for multipart/serials.

Options on the screen

Request item: Use this option to place a request. See section 421.4.2 for details.

Postdated requests: Use this option to view post-dated requests. See section 421.4.3 for details.

There are four main possibilities with respect to placing a stack request or a reservation at this point.

- The title has no holdings defined – in which case no stack request is possible.
- The title has holdings but none at a stack location
- The title has holdings only at one or more stack locations
- The title has both stack and “open access” locations

If the general option to allow a reservation to be placed on a stack item is checked (in the general parameters in AFO 815), then the staff member may always place a reservation; if not, then this is only allowed on items NOT in the stack.

Otherwise it is assumed that the staff member understands the most appropriate option for the user and will choose accordingly.

421.4.2 Placing the request

After choosing the option **Request item** the following form will be displayed:

The screenshot shows a web browser window titled "V-smart [2.0] -- Webpage Dialog". The main content area has a yellow background and is titled "Place stack request". The form contains the following fields and controls:

- Stack item 3999416 Star child
- Delivery location: (with a list icon)
- Table:
- If placed now ...
- Expected delivery date:
- Request date:
- Request time:
- Required by:
- Reservation priority:
- Volume number/year:
- Number of parts:
- Reader notes:
- Staff notes:

On the right side of the form, there are three buttons: "OK", "Cancel", and "Help". The status bar at the bottom of the browser window displays the URL "http://nlbawqavubis/sm200qa/ClientBody.csp?ClientId=1,23001" and "Local intranet".

Fields on the screen

Delivery location: This is the required delivery service point for the item; if the current service point is valid for the selected item, then this is offered as the default (regardless of the shortest delivery time). Optionally use the **List button** to select another location if available:

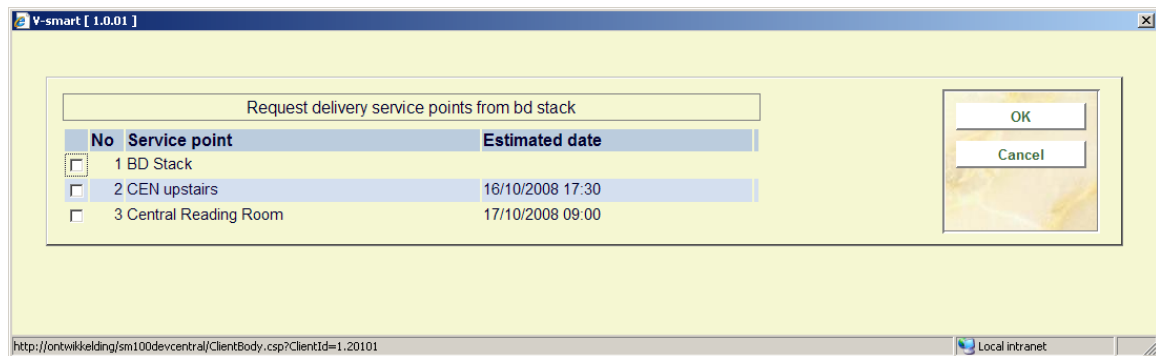


Table: A dropdown list of the tables defined for the above service point. A blank i.e. not known entry is always acceptable. If no tables are defined, then this will be protected.

Expected delivery date: [protected] This shows the delivery date and time calculated by the system.

Request date and **Request time:** should only be entered for a postdated request. It is the date that the item is required. Required time may also be entered but is not used significantly by the system. The processing of postdated requests is based around the date only; so the time element is for information only.

The system checks that this is greater than the expected delivery date and time. These are hidden if the stack request code for the reader disallows postdating the request.

Required by: indicates a date after which the delivery of the item requested is not useful. At this time, it is displayed for information purposes only - there is no functional processing associated with this.

Volume number/year: See section 421.4.4 for placing requests on multipart/serials

Number of parts: This option is for future use.

Reader notes: Free text field for additional info from the reader.

Staff notes: Free text field for internal note.

The field **Reservation priority** is only offered if the General option to use priorities is turned on in AFO 815. In this case, it can be used to indicate which requests should take priority when there is a reservation queue of such requests. A low number indicates a higher priority i.e. (reservation) requests of priority 1 will be satisfied before those at priority 2. There is also a default setting for this for requests placed via the WebOpac.

This is NOT related to reservations priority as described above for regular reservations.

After clicking **OK** the main request 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.

The screenshot shows a web form titled "Stack request number New" with three tabs: "General", "Bibliographic", and "Client". The "General" tab is active. The form contains the following fields:

- Title: Star child / James P Hogan
- Request status: New
- Alerts: (empty)
- Request number: New
- Request date: (empty)
- Required by: (empty)
- Reservation priority: (empty)
- Expiry date: 21/08/2010
- Expiry time: 23:59
- Confirm request:
- Staff notes: (empty)
- Placed: PNB_BD 18/08/2010 16:29 Tineke
- Request code: GEN
- Source of request: Online
- Internal system record id: (empty)

On the right side of the form, there is a vertical sidebar with the following buttons: Action/Event, History, Borrower, Route, OK, Cancel, and Help.

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.

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.

Stack request number New

General | **Bibliographic** | Client

Database: Smart's Format - Vubismart Database
Record: 1672
Description: Star child / James P Hogan. - Hogan, James P. - 269 p. - 0-671-87878-6. - New York, 1998

Stack location: BD REading Room
Item: 3999416
Institution: PNB
Location code: BD
Sublocation code:
Shelfmark classification: QA1234
Volume/number year:
Number of parts:
Item category: BO

Action/Event
History
Borrower
Route
OK
Cancel
Help

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 may always be amended.

Tab client

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

The screenshot shows a web interface for creating a new stack request. The title is "Stack request number New". There are three tabs: "General", "Bibliographic", and "Client", with "Client" selected. The form contains several input fields and controls:

- Id:** 900013425
- Name:** Jager, TD
- Status:** Incomplete
- Delivery location:** BD REading Room (with a list icon)
- Table:** (empty text field)
- Use in library only:**
- Contact method:** Print only (dropdown menu)
- Reader notes:** (empty text area)
- Charge:** .3
- Expected delivery date:** 18/08/2010 16:58
- Original expected delivery:** (empty text field)
- Blocked:** (empty text field)

On the right side, there is a vertical menu with buttons: Action/Event, History, Borrower, Route, OK, Cancel, and Help.

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

Delivery location: The delivery location (see above).

Table id: The delivery table (see above).

Use in library only: Check this option if the item may only be used in the library.

Contact method: The preferred mechanism for any correspondence to the client. Available methods depend on settings in AFO 616.

Reader's note: A free text field.

Charge: The charge for placing a stack request, derived from the settings for the borrower category in AFO 481. Once placed then the amount is NOT changeable.

Under very limited circumstances, the borrower initially entered may be changed, using the **Borrower** button.

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.

Click **OK** to save the request. Only on exiting this screen will the request be printed.

421.4.3 Post-dated requests

Postdated requests: Use this option view a post-dated request. A calendar will be displayed:

Post-dated requests for item 097986

Mon	Tue	Wed	Thu	Fri	Sat	Sun	Notes
October	2008						
13	14	15	16	17	18	19	
20	21	22	23	24	25	26	
27	28	29	30	31			
November	2008						
				1	2		
3	4	5	6	7	8	9	
10	11	12	13	14	15	16	
17	18	19	20	21	22	23	
24	25	26	27	28	29	30	
December	2008						
1	2	3	4	5	6	7	
8	9	10	11	12	13	14	
15	16	17	18	19	20	21	

Note: Dates in yellow correspond to a current request Dates in red correspond to post-dated requests already entered

OK
Cancel
Help

This displays a two month period (similar to MS Outlook) showing, in red, the dates that post-dated requests are already entered. The period in yellow shows the current request.

421.4.4 Placing requests for serials

After identifying the borrower, an overview screen is displayed:

The screenshot shows a web application window titled "V-smart [1.0.01] - Windows Internet Explorer". The user is identified as "tineke" at location "PNB/BD" with AFO: 421. The interface includes a navigation bar with "Settings" and "Exit" buttons, and a main content area with a "Stack Request" section and a table of holdings.

Stack Request
 Jansen, C : 00010454
 Smith, Richard
 Aeronautical journal : an experience
 UK, 1989 -

New stack request - serial 2.1309

No	Shelfmark	Type	Holdings	Routes to
<input type="checkbox"/>	1 PNB/BD J JOURNAL	Issues2		BD Stack,CENupstairs,Cen Reading room
<input type="checkbox"/>	2 PNB/BD J JOURNAL	Issues	Library has older volumes on microfiche.	BD Stack,CENupstairs,Cen Reading room
<input type="checkbox"/>	3		v.2003.no.1078,v.2004.no.1089	
<input type="checkbox"/>	4 PNB/BD J JOURNAL	Issues2		BD Stack,CENupstairs,Cen Reading room
<input type="checkbox"/>	5 PNB/BD J JOURNAL	Issues	2002,1061 ; 2002,1062 ; 2002,1063 ; 2002,1064	BD Stack,CENupstairs,Cen Reading room
<input type="checkbox"/>	6		2002,1066 ; 2002,1067 ; 2002,5,Autumn ; 2002,5,Winter	
<input type="checkbox"/>	7		2003,1068 ; 2003,1069 ; 2003,1070 ; 2003,1071	
<input type="checkbox"/>	8		Various issues from the years 2001, 2002 and 2003.	
<input type="checkbox"/>	9		+2003,1072	
<input type="checkbox"/>	10		v.2002.no.1065	
<input type="checkbox"/>	11	Vols	Retro for vols v1. - v.3.	BD Stack,CENupstairs,Cen Reading room
<input type="checkbox"/>	12 PNB/BD J JOURNAL	Issues2	v.61.no.1 - present	BD Stack,CENupstairs,Cen Reading room
<input type="checkbox"/>	13		Missing issues: v.61.no.7,v.61.no.8,v.62.no.3,v.62.no.7	
<input type="checkbox"/>	14		Library holds issues prior to 2000 on microfiche.	
<input type="checkbox"/>	15 PNB/BD J Journal	Vols	retro notes	BD Stack,CENupstairs,Cen Reading room
<input type="checkbox"/>	16 PNB/BD NEWONE		BD Stack,CENupstairs,Cen Reading room	
<input type="checkbox"/>	17 PNB/BD NEWONE	Issues2		BD Stack,CENupstairs,Cen Reading room
<input type="checkbox"/>	18 PNB/BD NEWONE		BD Stack,CENupstairs,Cen Reading room	
<input type="checkbox"/>	19 PNB/BD NEWONE	Issues2		BD Stack,CENupstairs,Cen Reading room
<input type="checkbox"/>	20 PNB/BD NEWONE	Issues3		BD Stack,CENupstairs,Cen Reading room
<input type="checkbox"/>	21 PNB/BD NEWONE	Issues4		BD Stack,CENupstairs,Cen Reading room
<input type="checkbox"/>	22 PNB/BD NEWONE	Issues4		BD Stack,CENupstairs,Cen Reading room

This displays a summary holdings statement for each location considered to be a stack location.

The header pane shows the name and barcode of the selected reader; followed by brief bibliographic details, as defined in the Element Group setting "Reservation" for the format of the record.

Columns on the screen

Shelfmark: the full location of the item

Type: the Type of Holding

Holdings: the summary holdings statement

Routes to : displays the available reading rooms (delivery locations) for an item from this location. If there exists more than 1 route, then an appropriate one will be shown followed by the text "+ 4 others". The location displayed will be the location of the current terminal if this matches, or otherwise it will be the first found (to all intents and purposes, random).

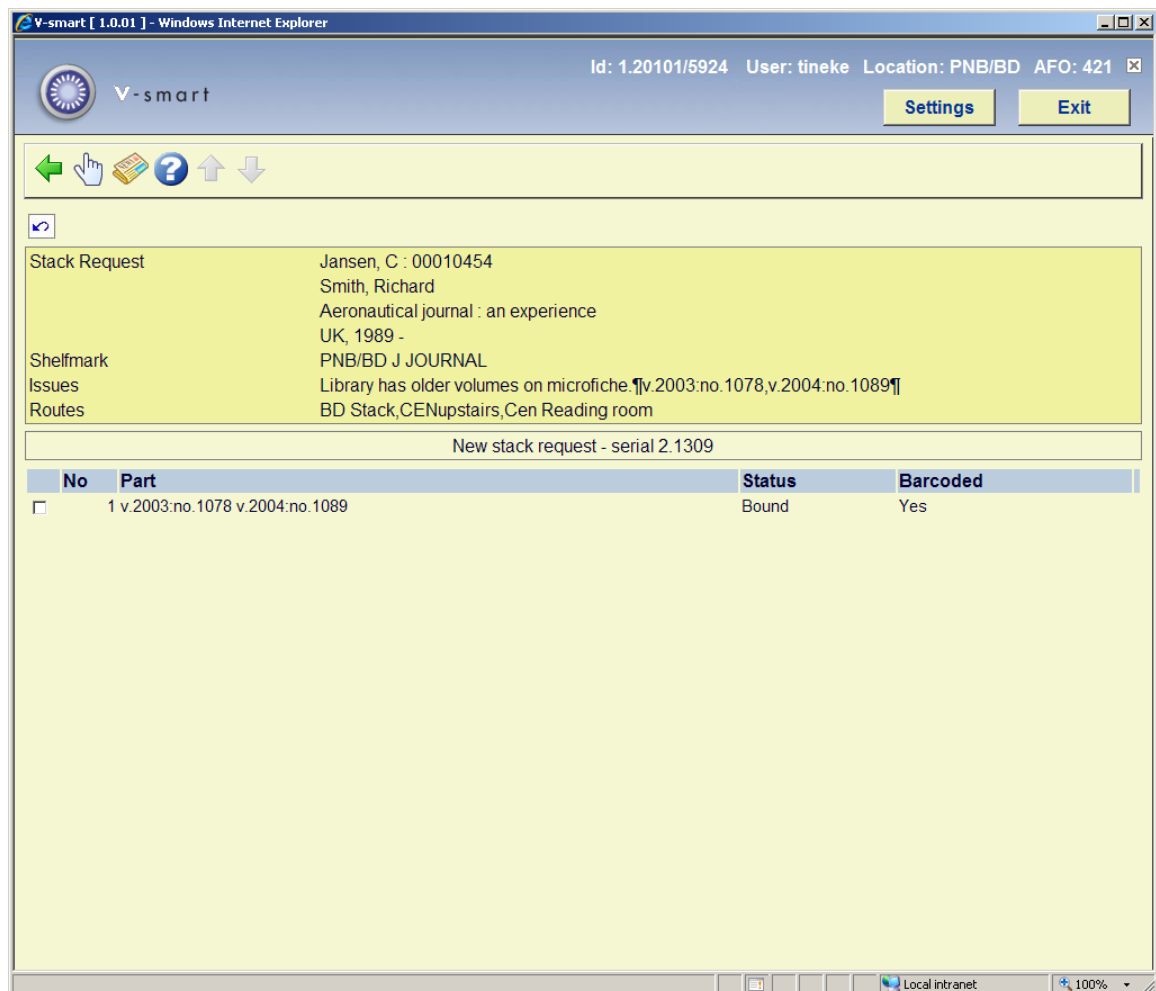
Options on the screen

Request item: Use this option to place a request. See section 421.4.4.1 for details.

Request unbarcoded part: Use this option to place a request for unbarcoded issues. See section 421.4.4.2 for details.

421.4.4.1 Request item

Request item: Use this option to place a request. Selection of a location line leads to the next overview screen:



The screenshot shows a web browser window titled "V-smart [1.0.01] - Windows Internet Explorer". The page header includes the V-smart logo, user information (Id: 1.20101/5924, User: tineke, Location: PNB/BD, AFO: 421), and "Settings" and "Exit" buttons. Below the header is a navigation bar with icons for back, forward, search, and refresh. The main content area displays a "Stack Request" for "Jansen, C : 00010454" and "Smith, Richard" with the title "Aeronautical journal : an experience". It also shows the shelfmark "PNB/BD J JOURNAL" and issues information "Library has older volumes on microfiche. [v.2003.no.1078,v.2004.no.1089]". Below this is a table titled "New stack request - serial 2.1309" with the following data:

No	Part	Status	Barcoded
<input type="checkbox"/>	1 v.2003.no.1078 v.2004.no.1089	Bound	Yes

Select a line to place a request, an input form will be displayed:

Place stack request

Stack item 2

Delivery location

Table

If placed now ...

Expected delivery date

Request date

Request time

Required by

Reservation priority

Volume number/year

Number of parts

Reader notes

Staff notes

http://ontwikkeling/sm100devcentral/ClientBody.csp?ClientId=1.20101 Local intranet

Volume number/year: [protected] displays the volume information as taken from the Part information of the selected issue(s).

See section 421.4.2 for a description of the rest of this form and the next steps.

421.4.4.2 Request unbarcoded part

Request unbarcoded part: Use this option to place a request for unbarcoded issues.

Select a line and then this option, an input form will be displayed:

V-smart [1.0.01]

Place stack request

Stack item Aeronautical journal : an experience [Periodical] -- SmithRichard

Delivery location

Table

If placed now ...

Expected delivery date

Request date

Request time

Required by

Reservation priority

Volume number/year

Number of parts

Reader notes

Staff notes

http://ontwikkeling/sm100devcentral/ClientBody.csp?ClientId=1.20101 Local intranet

Volume number/year: Allows for the entry of specific volume information. This field is mandatory when placing a request for an unbarcoded part.

See section 421.4.2 for a description of the rest of this form and the next steps.

421.4.5 Placing requests for non-catalogued material

In order to make a request for material which has been found (for example) in a card catalogue, it is clearly necessary for relevant bibliographic and call number data to be entered to allow the item to be retrieved.

Click on the **New record** button of the bibliographic search screen:

Search for a record

Standard System number **Z39.50**

Search expression

Select search method Find Browse

Select user index All words

Language

Published in or before

Published in or after

Location

Material type

Date added to the database

Number of pages

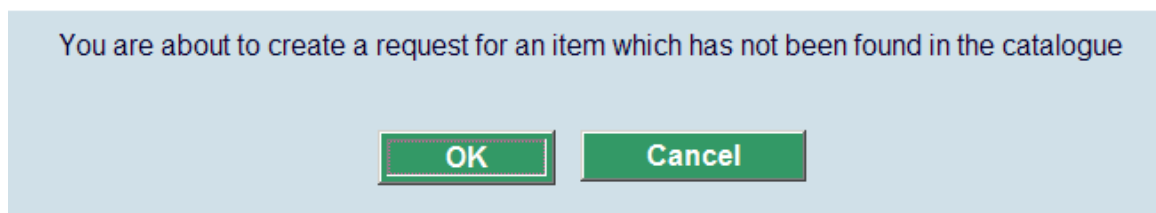
Bibliographic type

Save settings

OK
Cancel
Help
New record
Savelists
Previous
WebOpac



This **New record** button is only offered IF the institution is using the Stack request module.

A warning message appears:



After clicking **OK**, the search form for a borrower will be presented. Search and retrieve the correct borrower. A bibliographic input form will be displayed:

V-smart [1.0.01]

 **Bibliographic details for new stack request** 

Title	<input type="text"/>
Author	<input type="text"/>
Sponsoring body	<input type="text"/>
Edition	<input type="text"/>
Publisher	<input type="text"/>
Place of publication	<input type="text"/>
Date	<input type="text"/>
Series	<input type="text"/>

Article title	<input type="text"/>
Article author	<input type="text"/>
Volume/issue	<input type="text"/>
Date of article	<input type="text"/>
Pages	<input type="text"/>

ISBN / ISSN	<input type="text"/>
Call number	<input type="text"/>
Reference source	<input type="text"/>

<http://ontwikkeling/sm100devcentral/ClientBody.csp?ClientId=1.20101> Local intranet

Enter as many details as possible and click **OK**. Another form will be displayed:

Place stack request for uncatalogued item

Stack location:

Institution:

Location code:

Sublocation code:

Shelfmark Classification:

Delivery location:

Table:

If placed now ...

Expected delivery date:

Request date:

Request time:

Required by:

Reservation priority:

Volume number/year:

Number of parts:

Reader notes:

Staff notes:

Buttons: OK, Cancel, Help

URL: <http://ontwikkeling/sm100devcentral/ClientBody.csp?ClientId=1.20101>

Local intranet

See section 421.4.2 for a description of this form and the next steps.

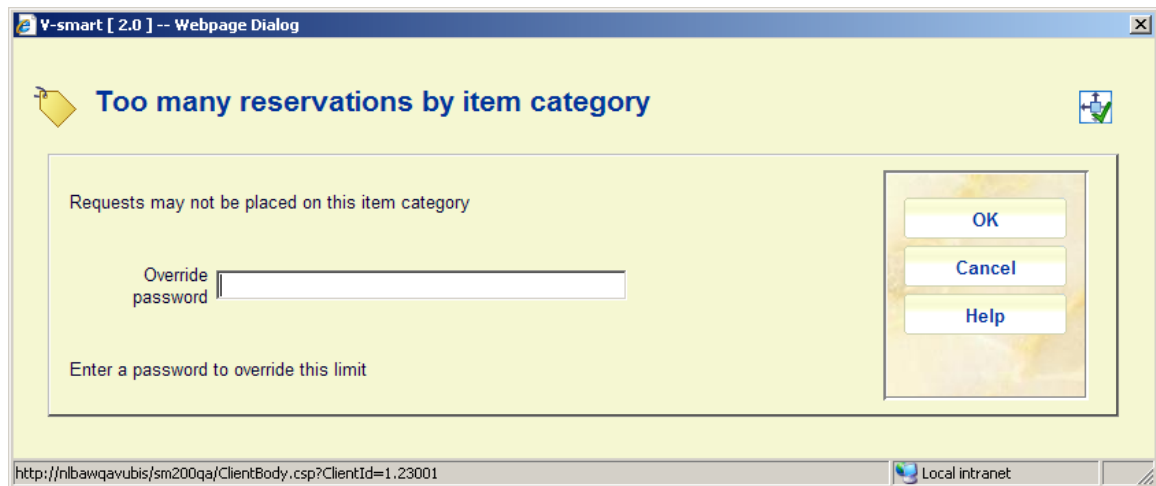
421.4.6 Request limits

There are various ways to optionally limit placing of requests for certain materials and / or in combination with specific borrower categories.

421.4.6.1 By item category

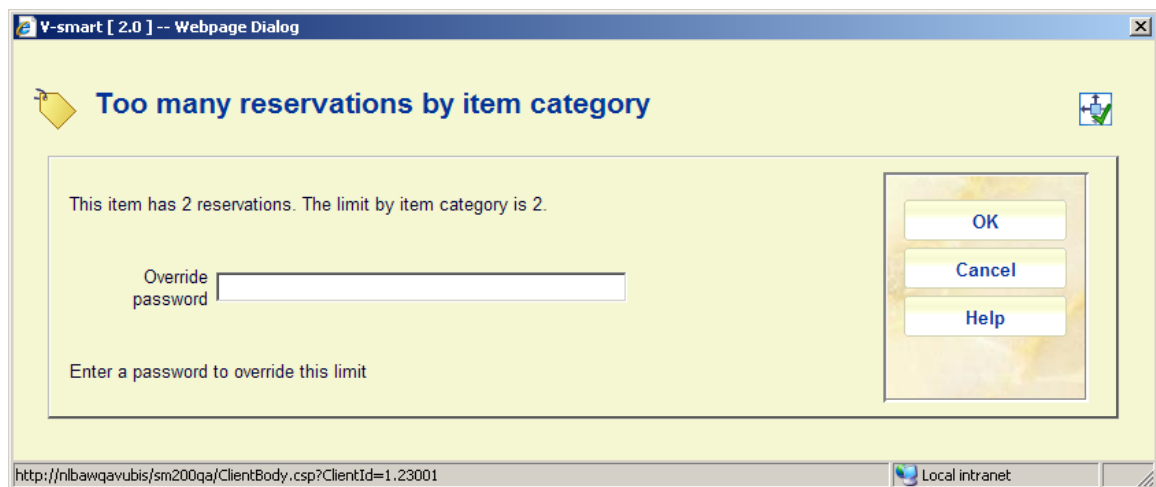
AFO 618 – Maximum reservation requests by item category:

If you set this to 0 for a specific item category this effectively precludes the item from being requested. A warning is shown, but staff CAN override the warning:



Setting it to 1 would prevent any reservations being placed on such items, but would allow a request to be placed if the item is available.

You can also set this to a specific number. If placing the request would take the number of requests above the maximum, then a warning is shown, but staff CAN override the warning.



The override password is the standard password as defined in AFO 481 – Miscellaneous – Circulation workflow – General.

421.4.6.2 By borrower category / item category

In AFO 618 option **Auth. Item/bor cat**: allows you to specifically exclude item categories for specific types of borrower. This can be set for each service point separately.

If such a limit has been set, corresponding items will show up in AFO 421 with a red cross in the left hand column. You can not select such an item to place requests.

No	Item	Shelfmark	Status	Date	Queue	Routes to
X	2010120	PNB/BD 123	Available		0	BD RR => BD RR,CENTRAL,Stacks

421.4.6.3 By borrower

In AFO 618 – Stack request codes, you can define various limits:

- Maximum current requests
- Maximum active requests
- Maximum reservations
- Daily limit on requests

See the help of AFO 618 for more information on these parameters and how they interact.

Stack request codes are then linked to borrower categories via AFO 481 – Miscellaneous – Stack request codes per borrower category.

If any such limit is reached, then a warning is shown, but staff CAN override the warning.



- **Document control - Change History**

Version	Date	Change description	Author
1.0	May 2008	creation	
1.1	September 2008	updates for stack requests	
1.2	January 2009	update of item info, due to new column display	
2.0	September 2009	new screen shot for reservation screen (owner displayed); reservation priorities part of 2.0 updates	
3.0	May 2010	new fields on stack request forms; limits for placing requests part of 2.0.06 updates	