

# RSV – Reservations parameters workflow

## 1 Introduction

This manual describes how to set up reservations parameters for WebOpac and client. Subjects covered include:

- setup and parameters
- example scenario's
- reservation priorities

Because of the many parameters throughout the system, which are spread over various AFO's, setting up reservations the way the library wants them to operate can be a complex business. This manual attempts to give a guideline through the various AFO's involved, in conjunction with the Web Preferences. In addition, this manual provides background information on the optional use of reservations priorities.

Please also consult the help on individual AFO's mentioned for full details of the functionality.

Before starting out on setting these parameters a library must ask itself 2 questions:

- 1) Based on a borrower home location, what are the valid pickup locations (what limits, are they willing to travel etc.)
- 2) What is the scope of the reservation (what items are eligible to fill this reservation?)

WebOpac reservations are mainly defined by the User Activities tab for the WebOpac profile under the section RESERVE:

RESERVE	
<b>General options</b>	
	Reservation location(s) is/are chosen by the borrower
<input type="checkbox"/>	Borrower can change reservation expiry date
<input type="checkbox"/>	Borrower gets reservation confirmation by e-mail
<input type="checkbox"/>	Borrower gets reservation confirmation by SMS
<b>Locations for reservation (*=all)</b>	
Available options	Chosen options
MARK/BRA MARK/CENTR MARK/NORTH MARK/SOUTH	* *
<input type="button" value="←"/> <input type="button" value="→"/>	<input type="button" value="↑"/> <input type="button" value="↓"/>
<b>Locations for pickup (*=all)</b>	
Available options	Chosen options
MARK/BRA MARK/CENTR MARK/NORTH MARK/SOUTH	* *
<input type="button" value="←"/> <input type="button" value="→"/>	<input type="button" value="↑"/> <input type="button" value="↓"/>

Per WebOpac profile, the library may define that :

- reservation location(s) are used (assigned by library or selected by borrower) for which the pickup location is \*Pickup where found

OR

- the borrower selects the Pickup location (scoped by location or general system or reservation area)

Alternatively, the server parameters (per location) can be set to ignore the WebOpac profile's locations for reservations and Locations for pickup and instead limit these to a borrower's home location or to a pre-defined "Reservation Area".

The 'Default placement reservation area' (scope) is initially defined in AFO481 - WebOpac - Reservations - Miscellaneous for the borrower's home location. This Default placement reservation area or scope can be defined as \*System – (WebOpac Profile settings as defined by Locations for reservation), !Local (set to borrower's home location) or an AreaCode (group of locations).

The valid 'reservation locations' are limited to a combined location list between the AFO481 'Default placement reservation area' as well as the Chosen options of 'Locations for reservations' in the WebOpac profile. The valid 'pickup locations' are defined by the Chosen

options for 'Locations for pickup' in the Webopac profile and may be limited if Reservation Areas are defined.

## Locations for Reservations

The list of location codes available are defined as Online managers in AFO461. Define which location(s) are valid for the scope of a reservation for this WebOpac profile. Any location which does not provide items which can be used for reservations should not be selected. Selected locations appear on the right hand side panel under the Chosen options. When the method of reservation is set to select a reservation area, the pickup location automatically set to \*-Pickup where found.

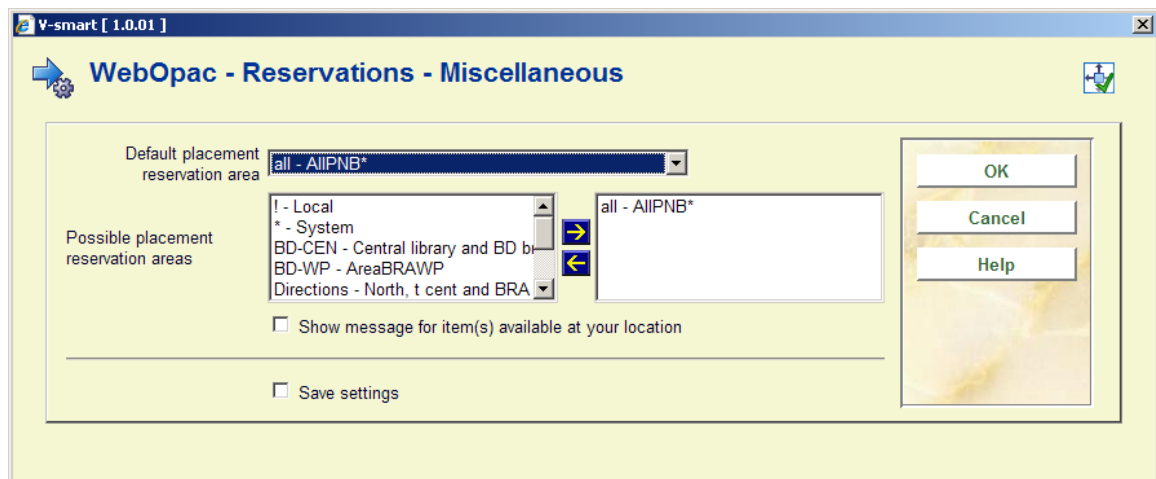
## Locations for Pickup.

The list of location codes available are defined as Online managers in AFO461. Define which location(s) are valid for the pickup location. Selected locations appear on the right hand side panel under the Chosen options. Used only if the Pickup location is available for selection by the borrower when placing a reservation.

# 2 AFO 481 settings

## 2.1 AFO 481 - Reservations - Miscellaneous and/or AFO 481 - WebOpac - Reservations – Miscellaneous

The following settings are defined per location and are used in conjunction with the WebOpac Profile for public reservations.



**Default placement reservation area:** The default placement reservation area is used to specify the level of control for the items eligible to fill the reservation or the *scope* of the reservation:

- When this value is set to \*System and there is nothing defined for the “Possible placement reservation areas’, the scope of reservation locations are controlled by the WebOpac profile and the list of locations defined as ‘**Locations for reservation**’.
- When this value is set to !Local, the valid reservation locations and the pickup locations are limited only to the home location of the borrower.
- When this value is set to a ‘Reservation Area ‘ Code (defined in AFO 481 - Reservations - Reservations Areas) the valid reservation and /or pickup locations are controlled by the Reservation Area definition in conjunction with the WebOpac profile.

<<<Use Staff Settings >>>	Follows rules defined by the AFO481 / Reservations / Miscellaneous (staff) settings . WebOpac and staff reservations use the same rules. See General Behaviour for definitions / rules.
*System	<p>The WebOpac profile’s ‘<b>Locations for reservation</b>’ and/or ‘<b>Locations for pickup</b>’ is used to provide the valid reservation locations and pickup locations when the field ‘Possible placement reservation areas’ is not defined.</p> <p>**If ‘Possible placement reservation areas’ are defined the WebOpac Profile is ignored.</p>
!LOCAL	<p>The borrower’s home location is used for the WebOpac reservations. The valid scope of the reservation and the pickup location is limited to the borrower’s home location.</p> <p>Reservations are not possible when there are no items / shelfmarks for the borrower’s home location. Reservations are not possible if the borrower’s home location is not in the valid list of reservation locations or valid list of pickup locations defined as available for the WebOpac profile.</p> <p>Borrower does not get any choice in reservation location and / or pickup location.</p> <p>‘Possible placement reservation areas’ are ignored</p>
Various site defined reservation area codes	The valid scope of the reservation and the pickup location is limited to the definition of the Reservation Area code selected.

	<p>Reservations are not possible when there are no items / shelfmarks within the scope of the Reservation Area</p> <p>Reservations are not possible if the locations defined within the reservation area are not in the valid list of reservation locations or valid list of pickup locations defined as available for the WebOpac profile.</p> <p>Borrower does not get any choice in reservation location but optionally may get a choice of pickup location.</p> <p>'Possible placement reservation areas' are ignored.</p>
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**Possible placement reservation areas:** When the 'Possible placement reservation areas' are defined AND the Default Placement reservation area is set to \*System, the values defined for Locations for reservation and Locations for pickup in the WebOpac profile are ignored . See the section Advanced Reservation Configuration for details.

Values for this field are:

- \*System,
- !Local
- or optionally member reservation areas for which this location is a member.

## 2.2 Reservation Area (optional)

Reservation Areas are basically a subset of the System and can be used to limit the scope of a reservation to geographical regions or to be able to 'remove' locations from the list of possible contributors to a reservation.

The Reservation Area(s) specify which locations are willing to share resources for the eligible items. Reservation Area(s) can also be used to control the list of valid pickup locations to be limited to the member locations of the reservation. These are optionally defined in AFO481 - Reservations - Reservation Areas

V-smart [ 1.0.01 ]

**Add new reservation area**

Code

Description [dut]

Description [eng]

Description [fre]

Included location(s)

- PNB/\*
- PNB/BACK
- PNB/BRA
- PNB/CEN
- PNB/EAST

Limit pickup location to included location(s)

Save settings

OK

Cancel

Help

The **location(s)** chosen are on the right side of the form. These limit the scope of the reservation to shelfmarks within these chosen locations.

The **Limit pickup location to included locations** allows to optionally set the valid pickup locations to the locations defined in the area code.

### 3 WebOpac Preferences settings

#### WebOpac Preferences / User Activities tab:

For each profile, define the behaviour for the WebOpac reservations in the section RESERVE:

RESERVE	
<b>General options</b>	
	Pickup location is chosen by the borrower
<input checked="" type="checkbox"/>	Borrower can change reservation expiry date
<input checked="" type="checkbox"/>	Borrower gets reservation confirmation by e-mail
<input type="checkbox"/>	Borrower gets reservation confirmation by SMS
<b>Locations for reservation (*=all)</b>	
Available options	Chosen options
EHV/* EHV/CENT EHV/GEST MARK*	*
<b>Locations for pickup (*=all)</b>	
Available options	Chosen options
EHV/* EHV/CENT EHV/GEST MARK*	*

Under the General Options, the following control options are available. The 'Default placement reservation area' (scope) is initially defined in AFO 481 for the borrower's home location. This Default placement reservation area or scope can be defined as \*System – (use the WebOpac Profile settings), !Local (set to borrower's home location) or an AreaCode (group of locations).

For the following table, the valid 'reservation locations' are limited to a combined location list between the AFO 481 'Default placement reservation area' as well as the Chosen options of 'Locations for reservations' in the WebOpac profile. The valid 'pickup locations' are defined by the Chosen options for 'Locations for pickup' in the WebOpac profile and may be limited if Reservation Areas are defined.

This table is applicable when the 'Possible placement reservation areas' is **not** defined.

WebOpac Option	Scope	Pickup
Pickup location is chosen by the borrower	Scope of the reservation is defined by the WebOpac profile's 'Locations for Reservation' when the AFO 481 – Default placement reservation area is set to *System.  When Default placement reservation areas is set to a reservation area code, the scope is set to the locations within the	Allow the borrower to select the valid pickup locations based defined in the WebOpac profile's 'Locations for pickup'  Borrower will be allowed to select only when there is more than one valid pickup location for this reservation otherwise it is set to the only valid pickup location.

	<p>area.</p> <p>When Default placement reservation areas is set to !Local, the scope is the borrower's home location.</p>	<p>If there are no valid pickup locations available (undefined OR area does not include a pickup location definition) the pickup location is set to the borrower's home location.</p>
<p>Pickup location is chosen by the borrower, reservation only at this location.</p>	<p>Once pickup location is selected, the scope is set to the location specified.</p>	<p>See above.</p>
<p>Reservation location(s) is/are chosen by the library</p>	<p>AFO 481 – 'Default placement reservation area' for borrower's home location AND WebOpac profile's 'Locations for Reservation'. (locations which are in both lists).</p>	<p>Pickup location is set to *Pickup where found. Borrower gets no choice.</p>
<p>Reservation location(s) is are chosen by the borrower</p>	<p>AFO 481 – ' Default placement reservation area' for borrower's home location AND WebOpac profile's 'Locations for Reservation'. (locations which are in both lists)</p> <p>Borrower may select more than one location. The scope for the reservation is limited to the selected location(s).</p>	<p>Pickup location is set to *Pickup where found.</p>
<p>One reservation location is chosen by the borrow</p>	<p>See previous definition. Borrower is allowed to select only one of the locations. Scope of the reservation is for the selected location.</p>	<p>Pickup location is set to *Pickup where found.</p>

### Locations for Reservations

The list of locations consists of codes defined as Online managers in AFO 461. Define which location(s) are valid for the scope of a reservation for this WebOpac profile, by moving them to the right. Any location which does not provide items which can be used for reservations should not be selected.



## Locations for Pickup.

The list of locations consists of codes defined as Online managers in AFO 461. Define which location(s) are valid for the pickup location of a reservation for this WebOpac profile, by moving them to the right.

## 4. General Behaviour

WebOpac / reservations: - Scope definition / locations for reservations- All settings are based on the borrower's home location / the current WebOpac profile is then applied as follows for the reservation location(s) or the scope of the reservation.

1. Check (in AFO 481) the Default placement reservation area definition for the home location of the borrower to obtain the list of locations which are valid for the scope of the reservation.
  - If this value !Local, then set scope location to the current Institution/Location.
  - If this value is a "Reservation Area code" then scope to the list of Institution/Locations from the defined area code. (Subset of the system).
  - If the value is \*System, the scope is set to all Institutions/locations in the circulation Meta. Check the WebOpac profile for the list of 'Locations for reservations' defined for the profile to obtain the final location list valid for this particular reservation

WebOpac / reservations – Pickup Locations - All settings are based on the borrower's home location / current WebOpac profile then applied as follows for the possible pickup locations - pickup locations are applicable only when the borrower is able to choose pickup locations. Pickup locations will be set to \*Pickup where found, when the WebOpac profile is set allow the borrower to choose the reservation locations instead.

1. Check the ' Default placement reservation area' definition for the home location of the borrower (in AFO 481) to obtain possible pickup locations.
  - If this value !Local, then set valid pickup location to the current Institution/Location.
  - If this value is a "Reservation Area code" then check the Reservation Area code to see if the Pickup locations are to be limited to the location set defined for the Reservation area or if Pickup locations should be set to All locations.

- If the value is \*System, the valid pickup locations are set to all Institutions/locations in the circulation Meta.
2. Check the WebOpac profile 'Locations for Pickup' to obtain the list of valid pickup locations defined for the profile. Compare (AND) the WebOpac profile list to the AFO481 list. Locations must be defined for both the 481 setting as well as the WebOpac profile in order to be valid. Result:
- If there is more than one pickup location, borrower is able to choose pickup location.
  - If there is only one pickup location, this is the 'fixed location'. Borrower does not get a choice
  - If there is no location defined, the pickup location is set to the borrower's home location.

## 5. Advanced Reservation Configuration

### Override WebOpac settings for a location.

Libraries may override all 'Locations for reservations' and/or 'Locations for pickup' for a WebOpac profile by allowing the borrower to select the scope of the reservation prior to starting the reservation.

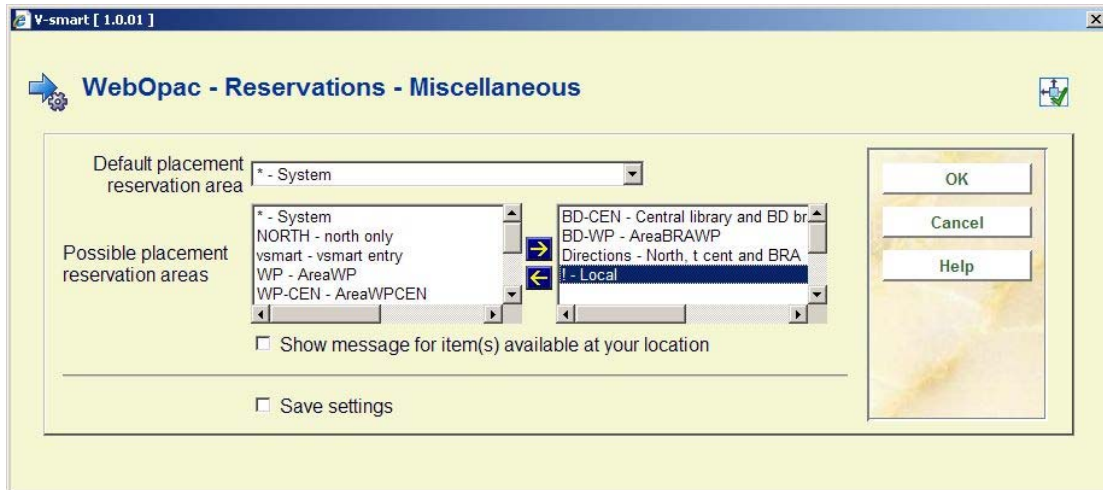
This is done by defining active values for the 'Possible placement reservation areas' and setting the 'Default placement reservation area' to \*System for the WebOpac Reservations – Miscellaneous settings in AFO481 (by location).

### Note

When this is activated, the definition of \*System is changed. It will no longer use the WebOpac profile to limit the reservation location(s), but instead uses all Institutions/Locations within the circulation Meta Institution along with the option of selecting a specific location or a group of locations.

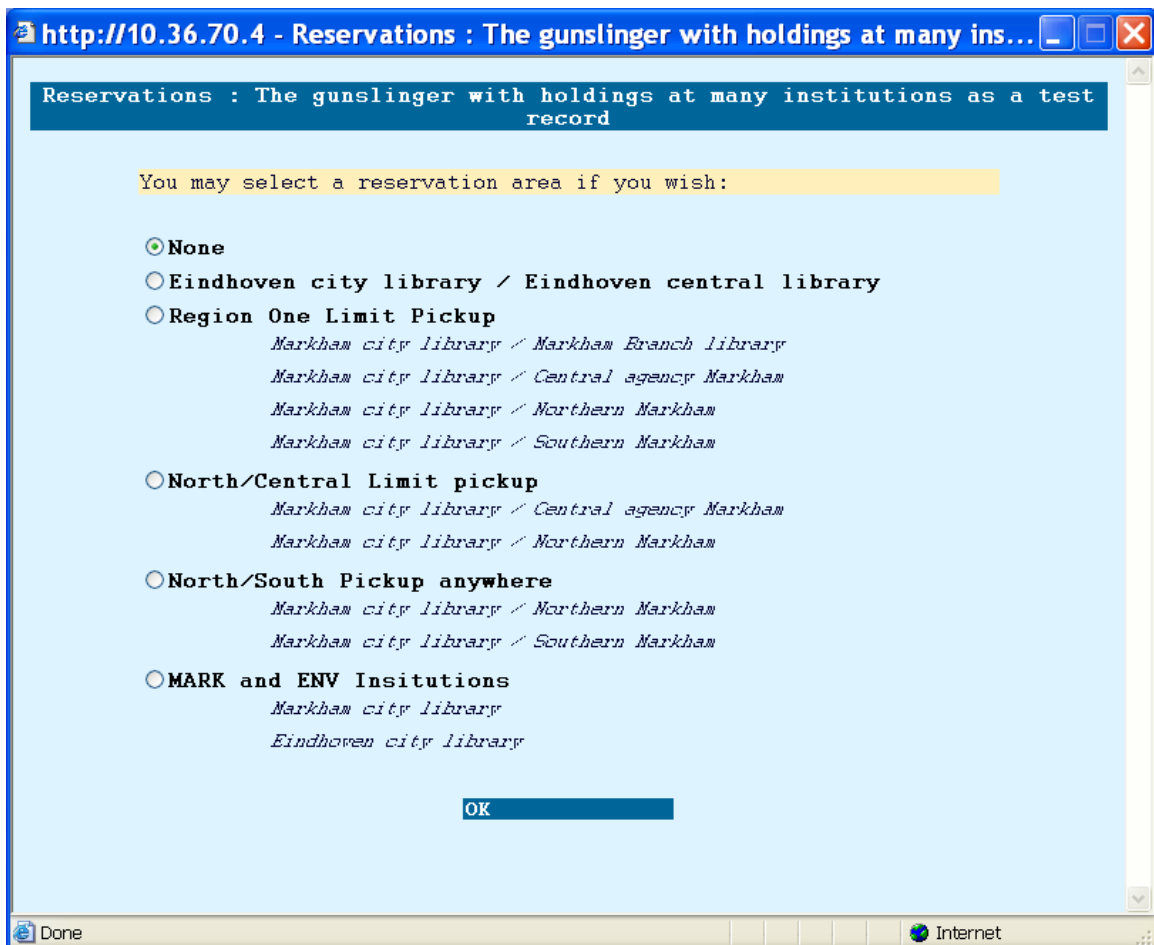
To configure, first optionally define your Reservation Areas in AFO 481 - Reservations - Reservation Areas (by location).

In AFO 481, set the Default placement reservation area to \*System. Then move the desired Reservation Area codes and/or !Local to the right hand side of the form for the "Possible placement reservation areas" (by location).



### Impact on WebOpac.

An additional form for the reservation appears when the Default placement reservation area is \*System and 'Possible placement reservation areas' have been defined. This allows the borrower to select a scope prior to continuing on with the reservation.



## Note

The values in the WebOpac profile (Locations for reservation / Locations for pickup) are no longer applicable. The value of 'None' means System Reservation (all institutions / all locations).

## 6. Scenarios

Below is a description of various possible scenarios.

### Fixed location for pickup.

- In the WebOpac profile, set the 'Locations for Pickup' to the only valid pickup location
- Set the general Options on the WebOpac profile to Borrower selects pickup location
- AFO481 - Define the 'scope of the reservation' via the 'Default placement reservation area' and perhaps the WebOpac profile 'Locations for reservation' when the default placement reservation area is set to \*System.

## Note

Remember that the pickup location must be valid in both the 481 scope setting as well as the WebOpac profile. If you are using a Reservation Area, your 'fixed pickup location' must be defined as a location supporting area reservations (AFO 481 – Reservations – Miscellaneous) although it does *not* need to be a member location of the reservation area unless the checkbox for Limit pickup location to included location(s) is ON reservations (AFO 481 – Reservations – Reservation areas).

### Set the Pickup location to the borrower's home location.

- WebOpac profile: Do not define anything in the 'Locations for pickup' OR ensure the home location of the borrower is not in the list for the profile
- Set the general Options for the WebOpac profile to Borrower selects pickup location

### Location limits

Library would like reservation locations (items available to fill the reservations) to be limited to:

- Items for an Institution Only

- Items for a location or set of locations
  - Items for selected Institution/Locations (perhaps over multiple Institutions)
  - Items for All except selected location(s) - (List of locations)
1. Set up a Reservation Area to include only the individual locations
  2. To limit pickup locations to the list of reservation location, ensure the checkbox is ON in the area code.
  3. Set 481 - WebOpac – Reservations - Miscellaneous - Default placement reservation area to the Reservation Area code

Borrower now gets little choice other than perhaps pickup location.

**Note**

Possible placement reservation areas, if they are defined, are ignored.

<b>General Option</b>	<b>Locations for reservation</b>	<b>Locations for pickup</b>	<b>Borrower selects / action:</b>	<b>Result</b>
Pickup Location is chosen by borrower	<p>List of locations (ignored)</p> <p>Reservation is limited to the locations defined in the reservation area</p>	<p>List of locations</p> <p>Pickup locations limited to area definition AND those defined in the profile.</p>	A pickup location from the list. This list contains locations in the area and Pickup Locations in this profile.	<p>If more than one, borrower may select. If there is only one result location then it is assigned. If there is no pickup location, the borrowers home location is used.</p> <p>Borrower may optionally change the pickup location in the User activities (also limited the combined list.)</p> <p>Items within the reservation area are reserved.</p>

Pickup Location is chosen by borrower, Reserve only at this location	(Ignored)	List of locations  Pickup locations limited to area definition and the list here	A pickup location from the list. This list contains locations in the area AND Pickup Locations in this profile	Pickup location is used. Borrower will not be able to change the pickup location in the User activities / Reservations.  Items for the pickup location only are reserved.
Reservation location is/are chosen by the library	(Ignored)  List of Locations - Only items within the area code definition are selected	Not applicable - will be set to *Pickup where found	Nothing	Borrower has no choice on reservation area or pickup. Only items within the area definition are eligible to fill the reservation.
One Reservation location is/are chosen by the borrower	(Ignored)  List of Locations - Only items within the area code definition are selected	Not applicable - will be set to *Pickup where found	Nothing	Borrower has no choice on reservation area or pickup. Only items within the area definition are eligible to fill the reservation

### Restricted to reserve only home location items

AFO 481 – Default placement reservation area is set to !Local, borrower gets little choice as both the Pickup and the reservation locations are set to the home location of the borrower with all the above options.

### WebOpac Profile only

Selection of reservation locations and / or pickup locations is controlled by the defined list in the WebOpac profile. The AFO 481 default placement area is set to \*System without any 'possible placement reservation areas' defined.

General Option	Locations for reservation	Locations for pickup	Borrower selects / action:	Result
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Pickup Location is chosen by borrower	List of locations	List of locations	A pickup location from the list.	Pickup location is used. Borrower may optionally change the pickup location in the User activities. Items within the reservation locations listed in the WebOpac profile are selected / reserved.
Pickup Location is chosen by borrower, Reserve only at this location	(Ignored) -	List of locations	A pickup location from the list.	Pickup location is used. Borrower will not be able to change the pickup location in the User activities  Items for the pickup location only are reserved.
Reservation location is/are chosen by the library	List of Locations	Not applicable - set to *Pickup where found	Nothing	Borrower has no choice on reservation area or pickup.
Reservation location is/are chosen by the library	List of Locations	Not applicable - set to *Pickup where found	Borrower may select one or more reservation location(s)	Items for the selected reservation location(s) are reserved. *Pickup where found
One Reservation location is/are chosen by the borrower	List of Locations - selected	Not applicable - set to *Pickup where found	Borrower may select reservation location	Items for the selected reservation location are reserved. *Pickup where found

## 7. Reservations priorities

The system supports the ability 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. There are 5 priority levels which can be defined by the library.

It is possible to assign a default priority level (defined in AFO 481 by borrower category) to a reservation when the reservation is created

It is possible to update the priority level on an existing reservation that is still open or active.

It is possible to assess different reservation fees dependent on priority of reservation.

## **Note**

Reservation priorities functionality is turned off by default. It must be activated by Infor Staff.

Below is a description of the necessary parameter setup, followed by a functional description.

## **7.1 Parameters**

### **Reservation priority authority list**

In AFO 482 – Borrower authority lists – there is an authority list 4096 – Reservation priority. There is no ability to add or delete codes. The system supports five codes (1 through 5). The library can change the description of each code. The code with the lowest number has the highest priority.

### **Default reservation priority setting by borrower category**

In AFO 481 – Reservations – Default priority by borrower category, you can 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.

### **Reservation fees by priority - reservations created by staff**

AFO 481 – Reservations – Reservation terms and fees – has 5 specific parameters, *priority 1 fee / priority 2 fee / priority 3 fee / priority 4 fee / priority 5 fee* at the end of the regular parameters.

*Priority n fee*: set to the amount of the reservation fee applicable for the specified priority. If defined, the *priority n fee* amount is used instead of the fee (field 1) amount when a reservation of the specified priority is created through AFO 421.

### **Reservation fees by priority -reservations created by WebOpac**

AFO 481 – WebOpac - Reservations – Reservation terms and fees – has 5 specific parameters, *priority 1 fee / priority 2 fee / priority 3 fee / priority 4 fee / priority 5 fee* at the end of the regular parameters.



*Priority n fee*: set to the amount of the reservation fee applicable for the specified priority. If defined, the *priority n* fee amount is used instead of the fee (field 1) amount when a reservation of the specified priority is created through the WebOpac.

## **Reservation priorities in use parameter - AFO 481**

AFO 481 – Reservations – Miscellaneous – Circulation institution uses reservation priorities.

This parameter is display only. Whenever reservation priority use is turned on or off, the database needs to be converted. For this you would need to contact Infor.

## **7.2 Functional description**

### **AFO 421 – creation of reservations**

If the parameter "*Circulation institution uses reservation priorities*" is ON, the additional field *Priority* will be displayed on the input form. This field is a dropdown list populated with the priorities (see under authority lists above).

### **AFO 415 – update of reservations**

Updating an existing reservation is possible when it is still open or active.

### **Calculating reservation fee**

When the reservation fee is calculated (either when placed or when loaned), the system will check if the *Circulation institution uses reservation priorities* parameter is set

- If set, check if any of the Priority n fee amounts are non-zero. If yes, use the appropriate amount. If no, use the Fee amount from field 1.
- If not set, use the Fee amount from field 1.

### **Note**

If the Priority of a reservation is changed after the reservation fee has been charged (i.e. priority is changed and the reservation fee was charged at time of placement), there will be no refund or reassessment of the reservation fee.

### **Reservation queue**

When the reservation queue is displayed (i.e. from AFO , 415, 418, AFO 422, etc), the system will display reservations in the following order:

- Trapped reservations by ascending activation date within priority (i.e. all priority 1 first in activation date order, then all priority 2, etc up to priority 5)
- all active reservations by ascending activation date within priority (i.e. all priority 1 first in activation date order, then all priority 2, etc up to priority 5)
- all inactive reservations by ascending priority (1 through 5) within ascending activation date.

If the parameter "*Circulation institution uses reservation priorities*" is ON, there will be an additional column, *Priority*, on the queue display screen.

Moving a reservation in the queue normally manipulates the activation date of the reservation. When this functionality is in use, it may also be necessary to change the priority level of the reservation when it is moved in the queue.

## **Trapping an item for a reservation**

The trapping logic will use the following sequence to build a list of reservation IDs:

- an item is already in transit for the reservation
- already trapped
- all active (activation date already past) reservations by ascending activation date within priority (i.e. all priority 1 first in activation date order, then all priority 2, etc up to priority 5)
- all inactive (activation date not yet past) reservations by ascending priority (1 through 5) within ascending activation date

Once the list of reservation IDs is rebuilt, the system can trap for the reservation using standard logic.

## **Adding a new item to a reservation**

When a new item is added to a title with reservations, the reservation ID will still be stored based on activation date of the reservation.

The trapping logic above is used to determine which reservation should be satisfied (if any) by this new item.

- **Document control - Change History**

<b>Version</b>	<b>Date</b>	<b>Change description</b>	<b>Author</b>
1.0	July 2008	creation	
2.0	October 2009	reservation priorities part of 2.0 updates	