

4.13 RESERVING MATERIAL

You can reserve available or unavailable material for the selected member from the local database of the home library, if there are no loan or reservation restrictions that apply to the material. If the member can access the My library service in COBISS/OPAC (has a password and no restrictions), he/she can enter a reservation by him/herself. Upon the member's request it can be done by a librarian in the COBISS3/Loan software module. If the material is not available, after a successful reservation the member is placed on the list of reservations. The member who is on the top of the list gets the material first as he/she reserved the material first.

If your library uses the COBISS3/Interlibrary Loan module, data on the customer (partner or member)¹, for which the home library material has been reserved upon receiving the ILL request, can also be displayed in the list.

In libraries with departments, you can reserve available or unavailable material (status *O* or *R*) also for an individual department. The procedure is the same as for reserving material for a member. In case of a reservation, the department will be added to the queue in the same way as for members. Once the material is assigned to a department, the material will have the status *W* – *waiting on the shelf (reservation)*. The material with the status *O* or *W* will receive the status *D* only when it is put on interdepartmental loan.

When returning the unavailable material, which was reserved also by other members, a notification with reservation details that is at the top of the list of reservations will be displayed. If ***reservation for member*** (who reserved the material in loan) is at the top of the list, the membership card number and the name and surname of the member will be displayed. If ***reservation for interlibrary loan*** is at the top of the list, the data on the new customer (partner symbol or a member's name and surname), their ILL request number and the date until which the material will be waiting for collection will be displayed.

In the case of a ***reservation for member***, the material is allocated to the member after a successful entering of the return of material, whereby the status of the reserved material will be automatically changed from *R* – *reserved unavailable material* to *W* – *waiting on the shelf (reservation)*.

The member will be informed that the material has been received in a way that is provided by the library for this purpose (e-mail, SMS notification, telephone call). The material is placed on the shelf for available reserved material along with a slip which contains details on the member who is the first on the list of reservations.

E-notification about the received reservation for a department will be sent to the e-mail address that is entered under the data on the department.

¹ The COBISS3 software enables entering interlibrary loan procedures also in libraries that transfer material from their own library collections through interlibrary loan to their members (and not only to libraries and other organizations in Slovenia and abroad).

The reserved available material must be prepared and the member who reserved the material must be notified. Notify the member in a way which he/she chose from available options (e-mail, etc.) and place the material on the shelf for that purpose.



Note:

*If the material is assigned for interlibrary loan and intended for a member, a notification about received reserved material will **not be sent** (by e-mail or SMS notification), even if the member is subscribed to e-notifications about received reserved material and the member's e-mail address and mobile phone number are entered.*

Precondition

General conditions for a reservation are:

- a reservation can be entered only for a member or a library department that was previously selected
- reservation of the material is not possible if there is no copy available for loan, unless the copy has value 2 – *in process* in subfield 996/997q in libraries with departments a reservation of the item can be entered only in a department to which the item belongs, i.e. to which it was put on interdepartmental loan; for a department you can reserve material **only** in the item's parent department

You can enter a reservation for the material in the following two ways:

- if a physical copy is in front of you, you can enter a reservation by entering or reading identification number of the copy in the **Home library material** window and clicking the **Reserve** button
- if material is not in front of you, you must find the material in the catalogue first, select the material and then reserve it

Below is a description of the procedure of reserving material in catalogue.

Procedure

1. In the **Home library material** editor, click the **Catalogue** button for the selected member.

The **Catalogue** window will open.

2. Find the material (the procedure of finding the material is described in chapter 4.12.1).
3. Select the material for reservation.

Select the material from the list which has the most favourable status for the user (available, no restrictions for loan, etc.). If no copy of the material is available, select the bibliographic description of the material or one of unavailable copies of the material. For serials always select an individual volume of serials.

4. Click the **Reserve** button.

When selecting the volume of serials, after clicking the **Reserve** button, the **Select issues** window will open where you can select one or several issues.²

When selecting the bibliographic description for a multi-volume material a window will open where you must select which volume you wish to reserve. You must select the physical form of the material you wish to reserve even for multimedia.

When selecting the unit which cannot be reserved (after clicking the **Reserve** button, i.e. the **OK** button in the **Select issues** window), the programme will display an appropriate message. Close the window by clicking the **OK** button and return to the **Catalogue** window to the list of displayed results. If the reservation is successful, the **Catalogue** window will close and you will return to the **Home library material** window again. The reserved material will be added to the end of the list of recorded material for the member. Reservation validity expiry date is automatically calculated on the basis of reservation validity, i.e. reservation validity period of the available material defined in the time parameter table for that type of material (see. chapter 2.1).

If there are restrictions for the member or the material restricting or disabling the reservation, an appropriate warning will be displayed. In the following cases you can decide if you wish to reserve the material despite the restrictions:

- the member has already reached the maximum allowed number of reservations
- availability level (996/997p) is defined for the copy restricting the loan; it usually applies to availability level 4 – restricted availability – reading room, 5 – restricted availability – with author's permission or 6 – the contents of the document is not available
- status (996/997q) is defined for the copy restricting the loan; it usually applies to status 6 – damaged

The *material cannot be reserved* in the following cases:

- there is no field 996/997 with accession number for the material
- the material does not belong to the department or is not put on interdepartmental loan to the department in which you wish to put it on loan (applies to libraries in which loan is organised by departments)
- the library does not allow loan for that type of material (reservation validity period is not defined in the time parameter table)
- availability restriction is defined for the copy 0d (996/997u) restricting outside loan, reading room loan and reservation of the material
- the material is already on loan to a member or department
- the material is already reserved for a member or department

² For serials the expression "issue" designates one item for loan. It can be an individual issue (if the issues are not bound) or several issues bound together.

- availability level (996/997p) is defined for the copy restricting reading room loan; this usually applies to availability level 7 – completely inaccessible (archival copy)
- status (996/997q) is defined for the copy restricting reading room loan; this usually applies to status that is different from 6 – damaged
- the Reserve button is inactive as one of the restrictions which disable the reservation applies for the member (Entry denied, Internet access only, membership card retained)
- the Reserve button is inactive because the upper limit of total debts has been reached or the date of the oldest entered debts exceeded the time period restrictions that are taken into account are defined by setting up special parameters upon the library's request)



Tip:

Upon the library's request, a special parameter can be set up, where in the case of unsettled debts within a specific period, a note will be automatically displayed before the conditions for loan restrictions are activated.

4.13.1 Reservations of available material

Reservation of the material that is not recorded for any member or partner is called a reservation of available material. When reserving available material the selected *item for loan* is reserved. Reservation of available material is related to ID number of the copy, which is accession number for monographs; for serials in several issues, accession number is followed by the issue number, i.e. a range of issues numbers bound together.

The reserved copy is displayed at the end of the list of the material recorded for the member and has status *O*. Reservation validity expiry date is automatically calculated based on reservation validity period of the available copy which you defined for that type of material in time parameters table in the column *ord*. (see. chapter 2.1). During this period you usually do not lend this copy to other members. The period to which the reservation of available material applies is usually shorter than the period that applies to usual reservations.

The reserved material must be prepared for the member and the member who reserved it must be notified that the material can be collected. You can prepare a list of material ready to be collected by the **Process reservations** method in the **Unavailable material** class (see. chapter 4.13.3). The material from the list must be found and according to library's procedures marked as ready to be collected by the **Prepare reserved material for collection** method in the **Unavailable material** class. Then, you can notify the member who reserved the material about this. You will notify the member in a way which he/she chose from available options (e-mail, etc.) and you will place the material on the shelf for that purpose.



Note:

If you wish to be notified regularly about reservations of available material recorded by the members in COBISS/OPAC, you must enter e-mail address for receiving notifications on reservations (see chapter 2.5). In libraries with departments enter e-mail address to the data on department.



Note:

If you put on loan available material which is reserved for the member despite that, the reservation will be automatically changed to the reservation of unavailable material (status O is changed to status R), and the member will be placed on the first place of the list of reservations.

4.13.1.1 Preparing reserved material for collection

If you wish to record when the reserved available material is ready for collection, use the **Prepare reserved material for collection** method in the **Unavailable material** class. By using this method you will mark that the reserved available material (material with status *O*) is prepared for loan to the member who reserved the available copy or to the partner for whom the material was reserved through interlibrary loan. Before performing the procedure, a list of reserved available material must be prepared (the **Unavailable material / Process reservations** method) based on which you can search for the material on shelves and place it on the shelf where it will wait for the member who reserved it.

Precondition

The copy of the material has status *O*.

Procedure

1. Highlight the **Unavailable material** class and select the **Class / Prepare reserved material for collection** method.

The **Preparing the reserved material for collection** window will open where you will enter ID number of the copy.

2. If necessary (depending on a reader's settings) you will confirm the entry of ID number by clicking the **OK** button.

The **Preparing reserved material for collection** window will close.

Once the procedure is performed, the status *O* is changed to *W* for the reserved available material, the date of change is recorded and expiry date of the status *W* is calculated based on the period you defined for that type of material in the time parameter table in the column *wait*. (see chapter 2.1).



Tip:

In the same way you can highlight that the available material which was reserved for interlibrary loan is ready to be lent to the customer.

The library will inform the member about the preparation of the material for collection in accordance with the method of notification. When doing this you

will consider the method of notification the member chose (e-mail, SMS notification, telephone call). If the member is subscribed to notifications on available reserved material and entered his/her e-mail address or telephone number, an e-mail, i.e. SMS will be sent at that moment.

If the library does not charge the costs of notification on available reserved material (automatic calculation method of the service is defined in the price list for the item *14 – RES notif. about avail. material*) and the member is not subscribed to e-notifications, the programme will prompt you to calculate the debt for the costs of notification.

After that, place the copy of the material along with the slip containing data on reservation on the shelf for reserved material.



Note:

*If material is allocated for interlibrary loan and intended for a member, a notification on received reserved material will **not be sent** (by e-mail or SMS notification) to the member, even if the member is subscribed to e-notifications about received reserved material and has entered his/her e-mail address or a telephone number.*

4.13.1.2 Printing slip with reservation details

You can place the material on the shelf for the reserved material or material allocated for interlibrary loan with a slip which contains details on the member who reserved the material or details on interlibrary loan reservations. If the material is reserved for interlibrary loan, the customer details (partner symbol or member's name and surname) and the ILL request number will be displayed on the slip. The slip is printed on the printer that is used for printing lending forms or invoices. The slip with reservation details is printed automatically:

- when returning the reserved material to the library if you allocate the copy to the member
- when preparing the reserved available material for collection (see chapter 4.13.1.1)



Note:

At the library's request, automatic printing of the slip can be turned off with a special parameter.

Options

Slip with reservation details can be printed later, if the material, for example, has been allocated to the next member on the list of reservations due to reservation cancellation in the My library service via COBISS/OPAC. Find the reserved material by using member or partner details or data on the material and save it to the workspace. Right-click on it and select **Print** or **Send** from the menu and *Slip with reservation details* from the list of report definitions.

4.13.2 Reservations of unavailable material

Reservation of the material that is recorded for another member or partner is called reservation of unavailable material.

When reserving unavailable material *record ID number* is reserved for a monograph (i.e. COBISS.SI-ID) because you do not know which copy will be available first. If it is a multi-volume material, volume designation (996d\|x) is added to record ID number and the reservation is recorded as *COBISS.SI-ID,x*. For the material in different physical forms, physical form designation (code for physical form 996g\|o) is added and the reservation is recorded as *COBISS.SI-ID,g\|o*.

For serials, the selected *item for loan* is reserved. It can be the number of the individual issue (if the issues are not bound) or the range of numbers of issues bound together.

The reserved copy is displayed at the end of the list of the material recorded for the member and has status *R*. Reservation validity expiry date is automatically calculated based on reservation validity defined for that type of material in the time parameter table in the column *res.* (see chapter 2.1).

The member is placed on the list of reservations. You can check the position on the list of reservations by highlighting the reserved material and clicking the **View** button (see chapter 4.11). The member or partner who is on the top of the list will get the material first because he/she reserved it first or the material was reserved for the member through interlibrary loan.

The material is allocated to the member who is the first on the list of reservations if the following events are recorded for the member who has the material at that moment:

- return of the material
- deleting the reservation of available material (status *O* or *W*)
- cancellation of the reservation in the My library service

You can find a more detailed description of allocating material for interlibrary loan in the COBISS3/Interlibrary Loan software module in the COBISS3/Interlibrary Loan User Manual, see chapter 2.3.2.1.

Status of the material is changed from *R – reserved unavailable material* to *W – waiting (reserved)* in the records of the material for the member (the **Home library material** window) for whom the reservation is recorded.

The member will be informed that the material has been received in a way that is provided in the library for this purpose (e-mail, SMS notification, telephone call). If the member is subscribed to e-notifications about availability of the reserved material and if the member entered his/her e-mail, i.e. mobile phone number, e-mail, i.e. SMS notification will be sent at that moment. You can place the material on the shelf for available reserved material with the slip containing reservation details.

If the reserved material is allocated to that member due to deletion or cancellation of the reservation for other member, you must find the material and, if necessary, print the new slip with reservation details.

4.13.2.1 Editing a list of reservations

When reserving unavailable material the member is placed on the currently last place of the list of reservations. You can check the position on the list of reservations by highlighting the reserved material and clicking the **View** button (see chapter 4.11). The order of the members on the list of reservations is automatically changed in the following cases:

- when the reserved material is returned to the library and is allocated to the member or for interlibrary loan (status of the material is changed from *R – reserved unavailable materials* to *W – waiting on the shelf (reserved)*, other members on the list move up for one place
- when the material is lent to someone else and not to the member with the reservation of available material (status of the material was *W – waiting on the shelf (reserved)* or *O – reserved available material*) the member with the reservation is placed on the first place of the list of reservations
- when the reservations are deleted or cancelled, other members on the list of reservations are moved up for one place on the list of reservations

The order of members on the list of reservations can be edited *manually* by the **Change place of reservation** method. The method is available in the **Insight into library material status** window which opens when using the **View** method (see chapter 4.11).

Precondition

Conditions to change the place on the list of reservations are:

- privilege *LOAN_RES – Editing list of reservations*
- you came to the **Insight into library material status** window from the **Home library material** window for the member for whom you wish to change place of reservation

Procedure

1. In the **Insight into library material status** window click the **Change place of reservation** button.

The **Changing place of reservation** window will open where current place of the member on the list of reservations is displayed. If there is no list of reservations or there is only one member on it, a warning message will be displayed.

2. In "New place" enter the place on which you wish to place the member on the list of reservations.
3. Save the changes by clicking the **OK** button.

You will return to the **Insight into the library material status** window.

4.13.3 Processing reservations

In order to follow regularly new reservations of available material reserved by members via COBISS/OPAC or by a librarian at the member's request in the COBISS3/Loan software module, or on the basis of ILL requests, it is recommended to regularly prepare lists of new and cancelled reservations. It is useful to prepare the list at least once a day. On the basis of that list you will move the reserved material to the special place or transfer it to the interlibrary loan department, where it will wait for the member or partner who reserved or ordered the material. The material whose reservations were cancelled via COBISS/OPAC must be returned to the shelves or to closed stacks. In libraries that have loan organised by departments you must prepare the list for each department separately. In libraries that use the COBISS3/Interlibrary Loan software module, the material which was reserved for interlibrary loan will also be displayed on the list.



Tip:

You can create a list of reservations also by sublocations of the material. This is appropriate especially for libraries where loan is not organized by departments and material is in different locations. If a library decides to process reservations by sublocations of the material (i.e. element d/l in the call number), a code list for processing reservations (CODE 322) must be prepared. As a code symbol, enter the location symbol where the reservation will be processed. Under »Value«, enter the following values:

- in libraries with no departments

sublocation 1, sublocation 2, ..., sublocation n

Example: Under "Code" enter: *Skll*, under "Value" enter: *K,La,Mi*

- in libraries with departments

department number: sublocation 1, sublocation 2, ..., sublocation n

Example: Under "Code" enter *Skll*, under "Value" enter: *01:K,La,Mi*

- in libraries where the sublocation is not entered for every item

Define any code symbol, enter **blank** in Value

Example 1: Under "Code" enter *Centrala*, under "Value" enter *blank*

Example 2: Under "Code" enter *Skll*, under "Vrednost" enter *K,blank*

If a code list of locations for processing reservations exists, when the method for processing reservations is activated, the drop-down list of reservations, as defined in this code list, will be displayed.

NOTE: If a library decides to process reservations by a code list of locations for processing reservations, it is important to include all sublocations to the code list. An option will be offered only for the sublocations entered in the code list.

In a library where loan is organized by departments, only reservations of the sublocations that belong to the same department can be included to the same location for processing reservations.

You can prepare:

- list of new reservations created during the period of the last creation of the list of new and cancelled reservations

The list of new reservations contains details on reserved available material (status *O*) in loan and interlibrary loan. Data on material is sorted by call numbers on the list.

- list of reservations cancelled via COBISS/OPAC

The list contains details on copies for which the reservation (material with statuses *O* and *W*) has been cancelled, details on the member who cancelled the reservation and data on the status of the copy after reservation cancellation.

- daily list of new reservations
- daily list of cancelled reservations
- lending forms for new reservations

Lending forms for the material on the list can be prepared when preparing the list. Lending forms are actually order forms sent to the closed stacks.

Procedure

1. Highlight the **Unavailable material** class and select the method **Class / Process reservations**.

The **Reservation processing** window will open displaying the date of the last creation of the list of reservations – it is the date and time when the list "new reservations and cancellations via COBISS/OPAC" was selected when processing the reservations.

2. Select the list that you wish to prepare by ticking the appropriate radio button:
 - new reservations and cancellations in COBISS/OPAC which contains all new reservations (in the COBISS3/Loan module and via COBISS/OPAC) and cancellations via COBISS/OPAC since the last creation of the list; two lists are created
 - daily list which contains all new reservations and cancellations via COBISS/OPAC on the present day; two lists are created
3. Use the check box to select if the list should include also:
 - new reservations of unavailable material (material with status *R*)
 - lending forms for reserved available material

The last selection in the check boxes is saved to user's settings, that's why it is not necessary to reselect the checkboxes during the next processing of reservations, unless you wish to change the settings.

4. Confirm the selection by clicking the **OK** button.

If the selected report(s) is/are successfully created, it will be sent to the printer. The created reports are automatically saved to the folder *Loan* and it is possible to print them later in the COBISS3/Reports module. In the folder *Loan* in the menu under **Creating reports** select **Browse stored reports**. The window containing the list of created reports will open. The name of the file contains date and time of report creation and in libraries with department ID in which the report was created.



Note:

If the copy has status available on the list of cancelled reservations, the text "Back to the shelf" will be displayed next to member's details. The copy should be returned on the shelf or to the closed stacks.

If the material was allocated to the next member or partner on the list of reservations after the reservation was cancelled, details of that member or partner will be displayed. In this case, the copy is not returned on the shelf or to the closed stacks. The member to whom the material was allocated must be notified that the material waits in the library. If the library enables notification about available reserved material by e-mail or SMS notification and if that service is activated for the member, the member will receive an automatic notification.



Note:

If you wish to be regularly informed about reservations of available material recorded by the members via COBISS/OPAC, you must enter e-mail address for receiving notifications about reservations (see chapter 2.5).

4.13.4 Batch deletion of reservations whose validity period expired

When recording reservations the date until which the reservation is valid is determined on the basis of the reservation validity period for individual type of material entered to the time parameter table (see chapter 2.1). If the member does not collect the material until that date, the reservation is considered to be invalid. The reservations can be deleted several times a day. If the loan is organised separately by departments, reservations must be deleted separately in every department.

For batch deletion of reservations whose validity period expired use the method **Delete expired reservations** in the **Unavailable material** class.

Procedure

1. Highlight the **Unavailable material** class and select the **Class / Delete expired reservations** method.

The **Delete expired reservations** window will open.

2. Select the reservations that you wish to delete:

- W – waiting on the shelf (reserved)
- O – reserved available copy
- R – reserved unavailable copy

You can highlight several different reservations or all types of reservations.

3. Confirm the selection by clicking the **OK** button.

The **Overview and sending of created report** window will open where you can see or send to printer the list of deleted reservations. Since the report is automatically saved, it is possible to print it later from the COBISS3/Report module. In the folder *Loan highlight the List of deleted reservations* and in the menu **Creating reports** select the method **Browse stored reports**. The window containing the list of created reports will open. The name of the file contains date and time of report creation and in libraries with department department ID in which the report was created.

During the procedure of deletion the programme checks if the copies with deleted reservation are reserved by other members. If so, the material with status *W* or *O* is allocated to the next member on the list of reservations.



Note:

If the library notifies the members about reservations whose validity period expired, the members who selected the option for such notifications either by e-mail or by SMS notification (ticked check box "Notif. about reservation expiry") will also receive a notification about deleting the reservation of the material.



Note:

Interlibrary loan reservations will not be deleted when batch deleting reservations.



Tip:

When searching for the material on the shelf on the basis of the list of new reservations of available material, use the **Prepare reserved material for collection** method in the **Unavailable material** class (see chapter 4.13.1.1). By doing so you change the loan status from *O* to *W*.

4.13.5 Reserving material for reading room use

Some libraries allow the material to be borrowed and used only in the reading room. A library can reserve the desired material for reading room use for a specific period of time (e.g. 5 days). This means that the material is in the reading room and will wait for the member at a special place (on the shelf, in

the cupboard, etc.) and will not be available to other members. Within the specified period, a member can borrow the material to the reading room several times and then return it to the special place, where it will wait for him/her.

Precondition

General conditions for a reading room reservation are as follows:

- reservation can be recorded only for the member you previously selected
- reservation for department is not possible
- reservation of material is not possible if a copy is not accessible for loan
- reservation of material is not possible if a copy is not available for loan
- in libraries with departments, it is possible to record a reservation of a copy only in the department to which a copy belongs to or is on interdepartmental loan to that department

Procedure

1. In the **Home library material** editor, click the **Catalogue** button under the selected member.

The **Catalogue** window will open.

2. Find the material (the procedure of searching the catalogue is described in chapter 4.12.1).
3. Select the copy of the material for reading room reservation.

For serials, always select an individual volume of the serial and then select one or more issues in the **Select issues** window.

If no copy of the material is available, you can record a reservation of unavailable material.

4. Highlight the **Reading room** radio button and click the **Reserve** button.

After a successful reservation, the **Catalogue** window will close and the **Home library material** window will stay open. The reserved material will be added at the end of the list of recorded material under the member with status *U – reserved in reading room*. The reading room reservation expiry date will be automatically calculated based on the reading room reservation validity period that is defined for this type of material in the column *read.* in the time parameters table.



Note:

If there are restrictions for the member or the material restricting or disabling the reading room reservation, appropriate message will be displayed. You can decide whether you wish to reserve the material despite the restrictions in the following cases:

– the member has already reached the maximum allowed number of reservations

– *availability level (996/997p) is defined for the copy restricting the loan; it usually applies to availability level 5 – restricted availability – with author’s permission or 6 – the contents of the document is not available*

– *status (996/997q) is defined for the copy restricting the loan; it usually applies to status 6 – damaged*



Note:

The material cannot be reserved for reading room in the following cases:

- *there is no field 996/997 with accession number for the material*
- *the material does not belong to the department or is not put on interdepartmental loan to the department in which you wish to put it on loan (applies to libraries in which loan is organised by departments)*
- *the library does not allow loan for that type of material (reservation validity period is not defined in the time parameter table)*
- *availability restriction is defined for the copy 0d (996/997u) restricting outside loan, reading room loan and reservation of the material*
- *the material is already on loan to the member*
- *the material is already reserved by the member*
- *availability level (996/997p) is defined for the copy restricting reading room loan; this usually applies to availability level 7 – completely inaccessible (archival copy)*
- *status (996/997q) is defined for the copy restricting reading room loan; this usually applies to a status that is different from 6 – damaged*
- *the **Reserve** button is inactive as one of the restrictions which disable the reservation applies for the member (Entry denied, Internet access only, Membership card retained)*