

**POM – Users services****Monitoring and processing reservations of available material****1 Introduction**

Until now, reservations of available material were processed by one or more library employees working at the lending desk, who created a list of newly received reserved copies using the method **Unavailable material / Process reservations**. The list was intended for finding reserved material and removing it from the shelves. In some libraries, they printed lending forms for newly received reservations instead of the list. In others, they monitored reservations of available material by e-mail, using the address entered in the data on the library and/or the department.

Once the material was removed from the shelves, it had to be prepared for a member to collect it, and the member had to be notified that the material is waiting for them. This was done with the method **Unavailable material / Prepare reserved material for collection**.

The experiences have shown that because material is placed in various locations and because the processing of reservations of available copies is performed by more than one person, there is a need for:

- the option of simultaneous and detailed monitoring of what is going on with the reservation of an individual copy;
- setting up more than one spot for monitoring and processing reservations of material, if the material in libraries (with or without departments) is placed on different physical locations and if there is a desire to process reservations there (e.g. separately in the library and in the closed stacks).

This led to a software upgrade that enables you to specify more than one reservation processing spot within a department or in a library without departments. The software upgrade also enables a very detailed monitoring of the processing steps of reservations of available material (e.g. who is processing an individual reservation of material, the current processing stage of an individual reservation, marking that reserved material could not be found, etc.).

The instructions describe:

- how to perform the procedures of processing reservations of available material, which were available in COBISS3/Loan software until the version V6.13-03, in the upgraded method for monitoring and processing reservations;
- the additional options for monitoring and processing reservations;
- possible settings for monitoring and processing reservations
- how to create a new reservation processing spot and how to maintain the reservation processing spot data.

## 2 Short description of the upgraded method for monitoring and processing reservations

In the COBISS3/Loan software module, the **Reservation processing spot** class has been added, where you can monitor everything regarding the reservations of available copies of material.

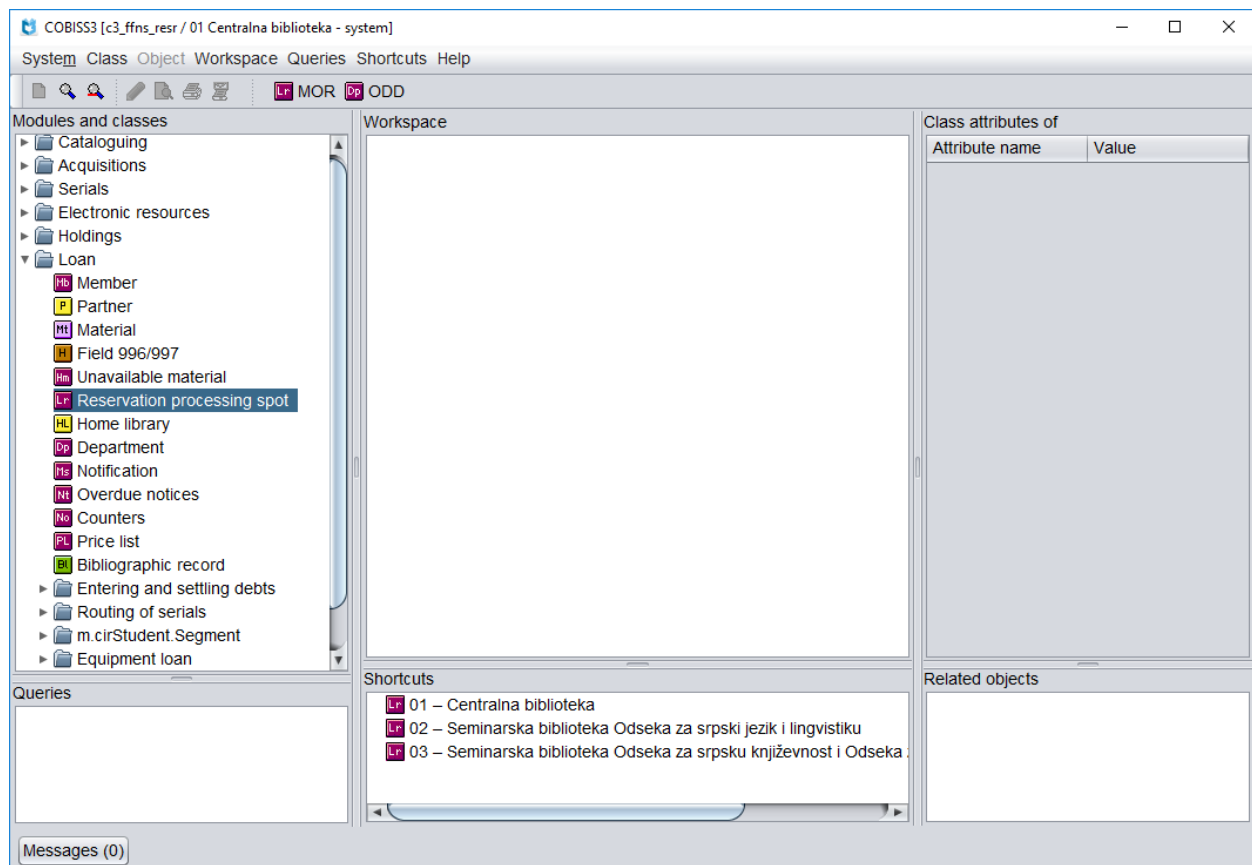


Image 1: The new *Reservation processing spot* class

### 2.1 Finding reservation processing spots and creating a shortcut for an individual spot

In the **Reservation processing spot** class, use the **Search** method, open the **Search – Reservation processing spot** search window, and find the reservation processing spots. Add the spot or spots, which you will need for your work, to the shortcuts.

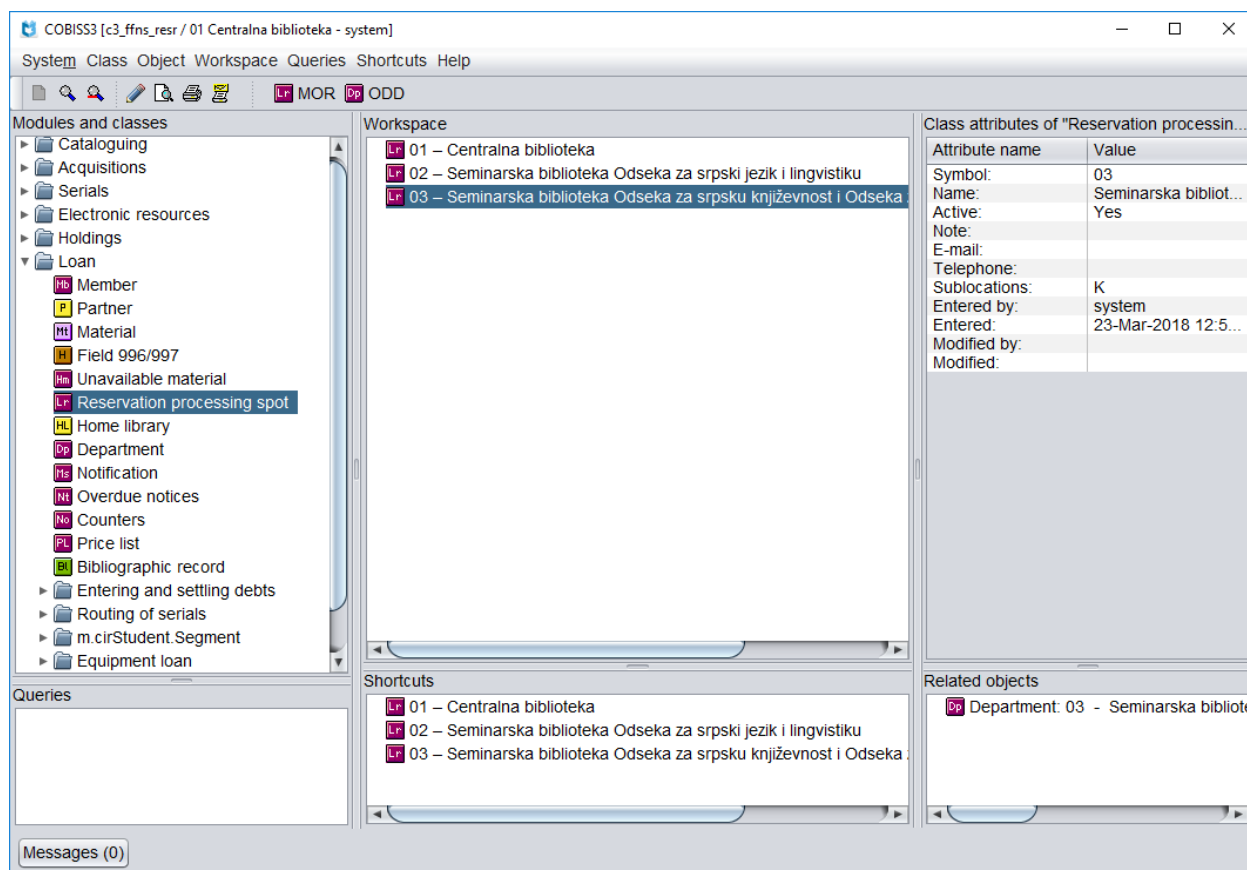


Image 2: Creating shortcuts for the selected reservation processing spots

## 2.2 How to perform reservation processing procedures, which used to be done with methods *Unavailable material / Process reservations* and *Unavailable material / Prepare reserved material for collection*

On an individual reservation processing spot, which is transferred to the workspace, click the right mouse button and select the method **Monitoring and processing reservations of available material**. You need the *LOAN\_BASIC* privilege to use this method.

**NOTE:** in an individual department of a library with departments, you can activate this method only for reservation processing spots belonging to the login department.

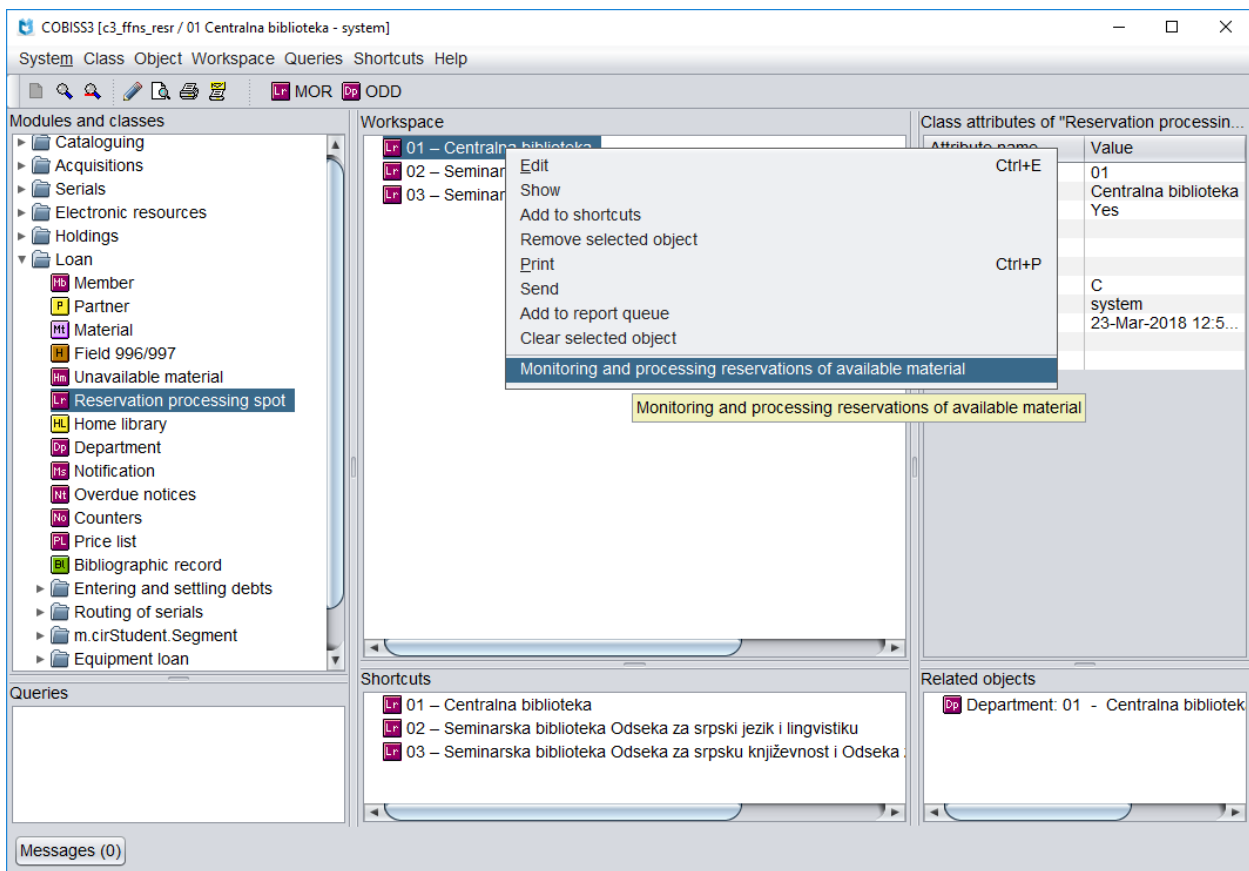


Image 3: Activating the method for monitoring and processing reservations

After activating the method, the **List of reservations and cancellations of available material** window will open. In the title bar of the window, the ID and the name of the reservation processing spot are displayed in brackets.

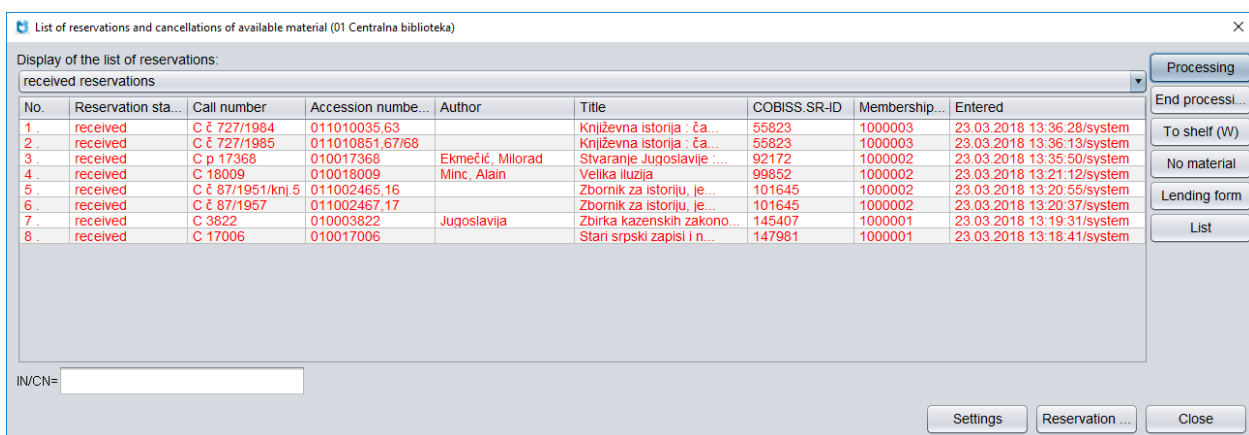


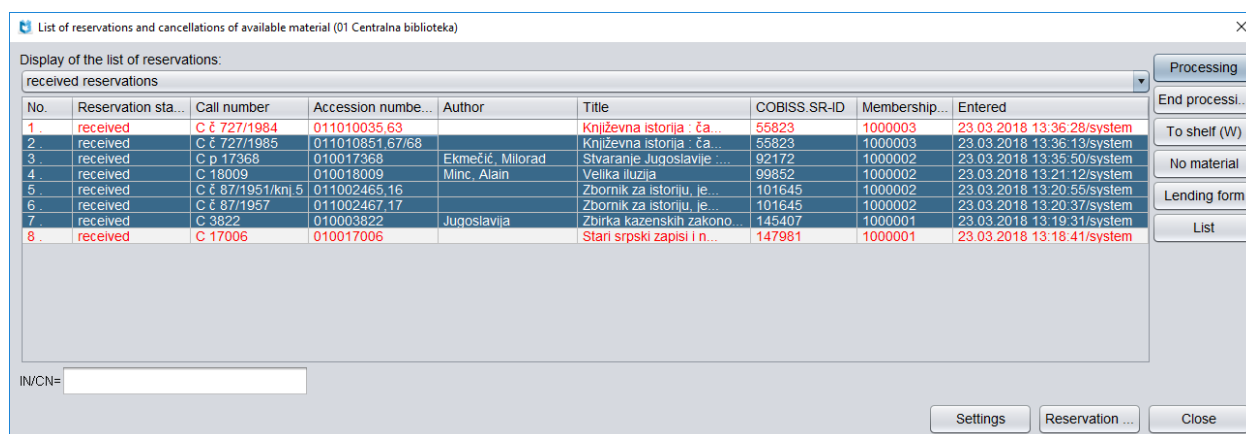
Image 4: Contents of the *List of reservations and cancellations of available material* window

The list contains the reservations of available copies of material for the selected reservation processing spot. It displays the data on the call number, accession number, title, membership

card number, loan status etc. You can edit which data is displayed according to your needs (see ch. 3 – *Additional options and user settings for monitoring and processing reservations*).

On the drop-down list **Display of the list of reservations**, select the option "received reservations". This will display the new reservations of available copies of material. The list is refreshed automatically – when a new reservation of available material is created, it is added to the list.

Use the mouse to mark the reservations of available copies, for which you want to print the lending forms or the list of reservations.



**Image 5: Marking the reservations of available copies of material**

If you click the **Lending form** button, the lending forms will be printed. If you click the **List** button, the list of reservations of material will be created, which you can print.

Find the material and remove it from the shelf. Then, prepare it for collection. Do this by clicking the **To shelf (W)** button. This option is a replacement for the method **Unavailable material / Prepare reserved material for collection**, which was used until now. Use the barcode reader and read the accession number of the copy. When you click the **OK** button, the material will be prepared for collection by the member (the status of the reserved copy changes from **O** to **W**.) As was the case in all previous version of the COBISS3/Loan software, a notification is sent to the member when you perform this procedure. The notification informs the member that the material is waiting for them at the library (if the member is subscribed to e-notifications about received reserved material). You can also decide not to inform the member about the fact that the material is ready for collection (uncheck the "Member to be notified" box). The slip with the details on the material and member, for which you prepared the material, is printed automatically. Insert the slip into the material and place the material on a spot, where it will wait until it is loaned out.

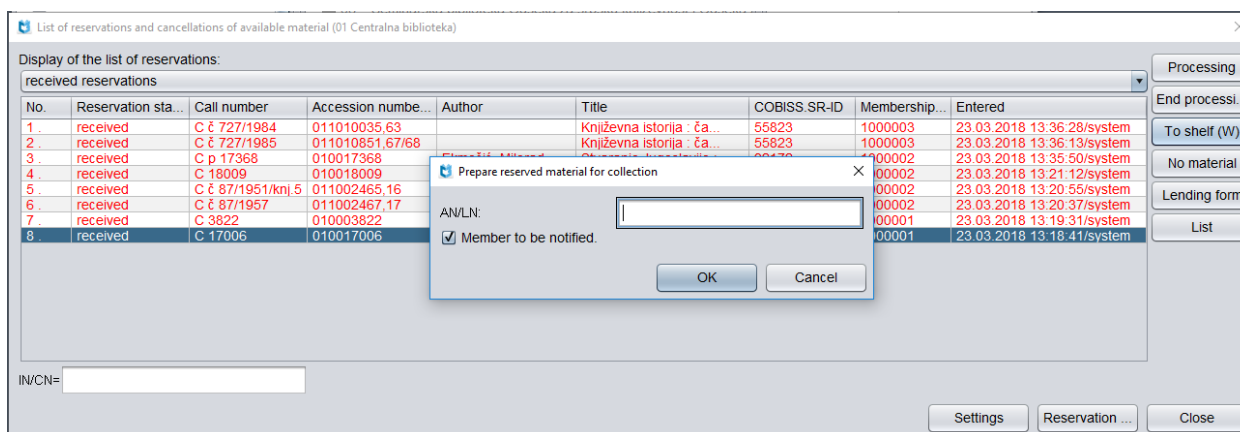


Image 6: Preparing the material for collection – entering the accession number of the copy

When you complete the reservation processing procedures and prepare the material for collection, click the **Close** button and leave the **List of reservations and cancellations of available material** window.

When you want to check for potential new reservations of available material, perform the method **Monitoring and processing reservations of available material** on an individual reservation processing spot again.

### 3 Additional options and user settings for monitoring and processing reservations

Apart from the procedures of processing reservations of available items of material, which you could perform in the COBISS3/Loan software module until now, the software upgrade allows you to perform some additional procedures. These enable a detailed monitoring of the status of individual reservations of material. To give an example: if several persons in a library are processing reservations at the same time, the person, who will go and look for the reserved material, can mark an individual reservation, which they have taken over for processing. For these purposes, the upgraded software is recording the reservation status of an individual reservation of material (e.g. the reservation receives the status *in process*, when someone starts working on it – takes it over for processing). The status of the reservation of material is also visible in the **Home library material** window in the column **Dpt/RSts**. Reservation status should not be equated with loan status. There are no changes in that area.

Home library material (01 Centralna biblioteka)

Member: 1000001 Monika Kovač, Fourth year, 01.10.1986, students (full-time)

Debts: RSD 0,0000 Entered equipment: 0

No. of copies on loan (LOAN): 0; Membership expiry date: 11-Nov-2009; Date of last visit: 23-Mar-2018

St/Nt	Access./ID/Type	Description	DPT/RSIts	Loan/ren/chng	R/RAL/RR	Due/ovrd	Delay/ovrd/No.
W	010021433	TI=Skriveni svet Vladimira Ćorovića : ka uspostavljanju cjel...			23-Mar-2018	28.03.2018	
	books - fiction	AU=Marinković, Borivoje			23-Mar-2018		
		SG=C 21433	waiting on th...				1.
O	010017080	TI=Stari srpski zapisi i natpisi. Knj. 6			23-Mar-2018	26.03.2018	
	books	AU=Stojanović, Ljubomir (editor); Cernić, Lucija (editor) (a...					
		SG=C 17080	missing mat...				2.
O	010017006	TI=Stari srpski zapisi i natpisi. Knj. 5			23-Mar-2018	26.03.2018	
	books	AU=Stojanović, Ljubomir (editor); Cernić, Lucija (editor) (a...					
		SG=C 17006	received				3.
O	010003822	TI=Zbirka kazenskih zakonov			23-Mar-2018	26.03.2018	
	books						
		SG=C 3822	received				4.

AN/LN=

Outside loan  Reading room loan

Catalogue View COMARC Lend Return Retain Renew Reserve Lending form Close

Image 7: Reservation status in the Home library material window

### 3.1 Additional options

You can activate the additional options by clicking the button on the right-hand side of the window **List of reservations and cancellations of available material**:

- If you want to mark that a reservation has been taken over for processing (i.e. that one of the employees is already working on the reservation – e.g. they printed the lending form for a newly received reservation and went to look for the copy of material), do this by clicking the **Processing** button. After performing this procedure, the reservation status will change to *in process*.
- If you want to mark that you have finished processing the reservation (e.g. you found the copy of the material in the closed stacks and sent it to the lending desk), click the **End processing** button. The reservation status will change to *processed*.
- If you do not find the reserved copy of material, you can mark this by clicking the **No material** button. The reservation status will change to *missing material*.

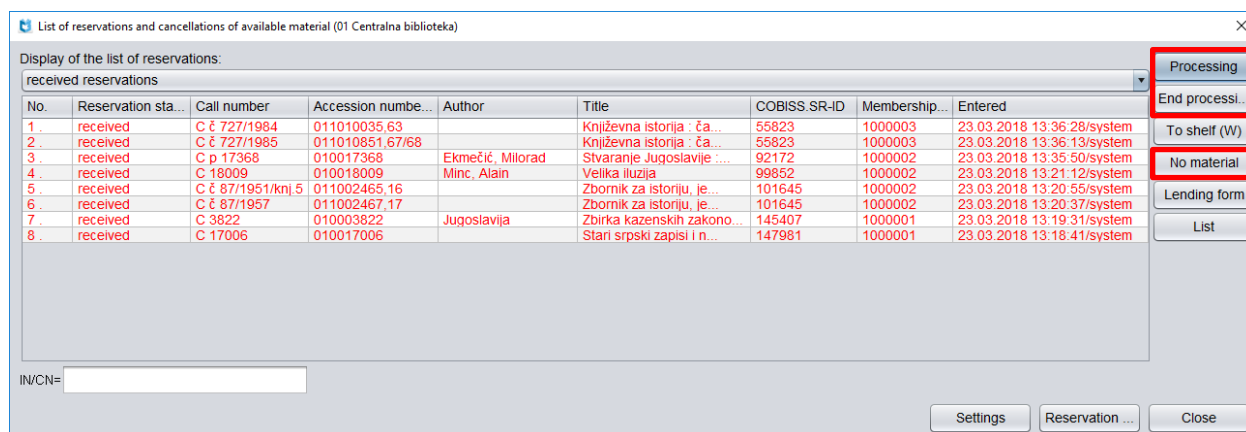


Image 8: Additional options in monitoring and processing reservations

### 3.2 User settings

The method for monitoring and processing reservations can differ from library to library. That is why it is possible to adjust the options and data display in the window **List of reservations and cancellations of available material**. This allows you to specify:

- which reservation processing methods are visible (which buttons on the right-hand side of the window are displayed),
- how certain methods work,
- which data is displayed for the reserved copies of material.

The settings are tied to an individual username and to an individual reservation processing spot. This means that each employee can modify the window content so that it suits the tasks they are performing when processing reservations.

If you click the **Settings** button in the window **List of reservations and cancellations of available material**, a new **Settings** window will open.

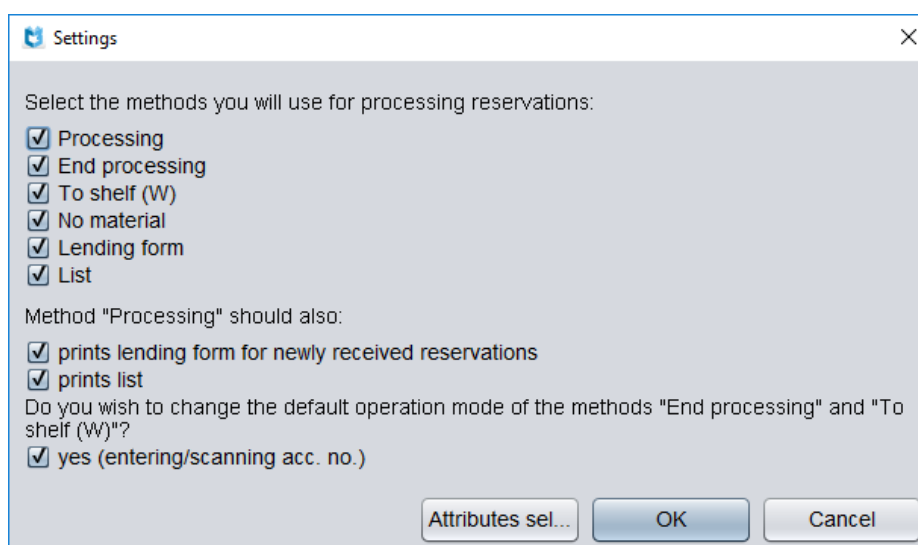


Image 9: Option settings in monitoring and processing reservations of material



Choose the methods you will use in reservation processing.

You can specify, whether the lending forms and/or the list should be printed when you select the **Processing** option.

If you are not using barcode readers when processing reservations (if you are entering accession numbers manually), uncheck the "yes (entering/scanning acc. no.)" box when changing the default operation mode of the methods **End processing** and **To shelf (W)**. In this case, the chosen procedure will be performed for the reservation, which you selected from the list of reservations beforehand.

If you click the **Attributes selection** button, you can specify, which data on the reservations of material should be displayed in the list of reservations. Select the attribute in the "Unselected" group and click the **Add** button to add it to the "Selected" group in the order, in which you want the data to be displayed in on the list of reservations.

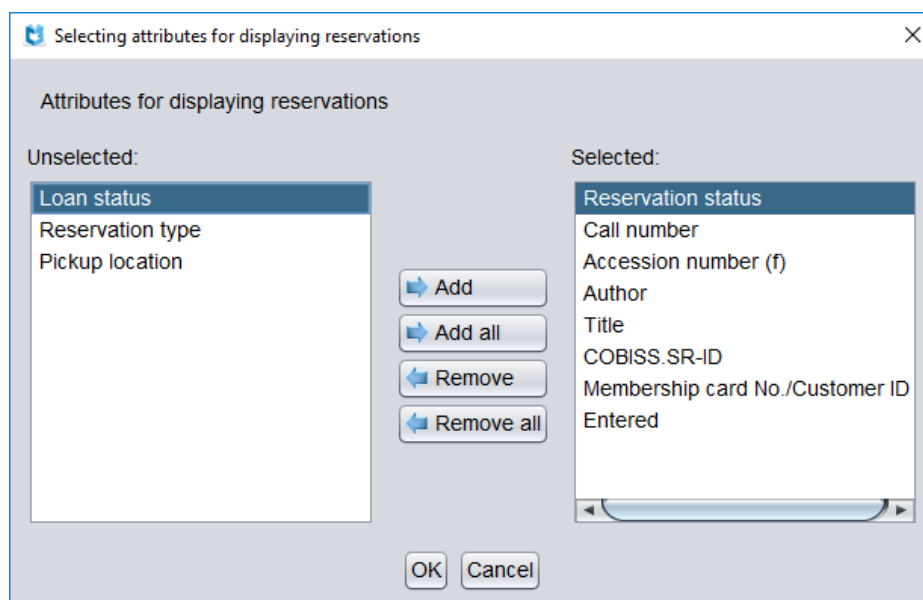
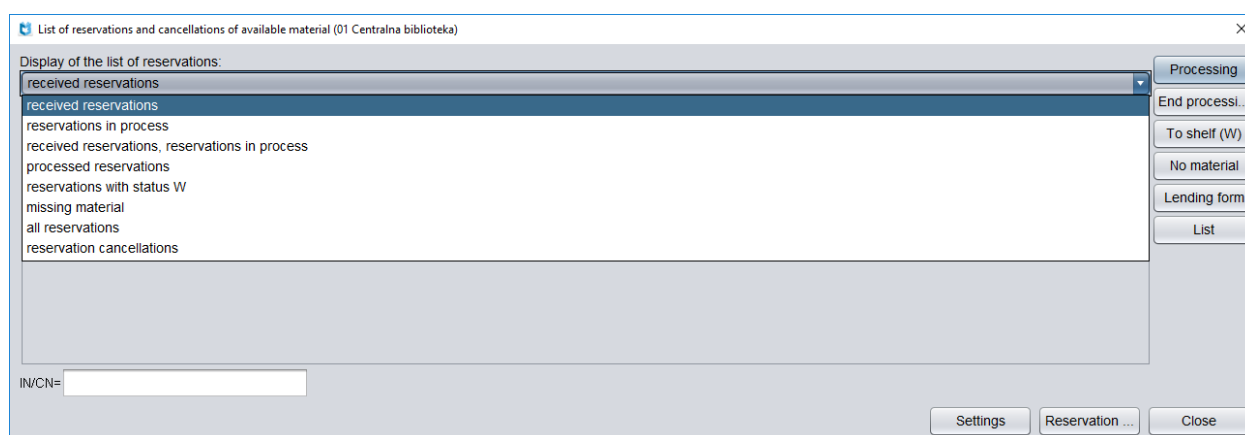


Image 10: Selecting attributes for displaying the data on reservations

### 3.3 Displaying the lists of reservations

The window **List of reservations and cancellations of available material** enables the display of reservations by reservation status. Select the display from the drop-down list **Display of the list of reservations**.



**Image 11: Possible displays of the list of reservations**

You can chose between the following displays:

- received reservations  
The data on new reservations of available copies of material is displayed. The reservation status is *received* and the material status is *O – ordered*.
- reservations in process  
The data on reservations, which have already been taken over for processing with the **Processing** method, is displayed. The reservation status is *in process* and the material status is *O – ordered*.
- received reservations, reservations in process  
The data on new reservations and reservations already in process is shown.
- processed reservations  
The data on reservations, whose processing has already been completed with the **End processing** method, is displayed. The reservation status is *processed* and the material status is *O – ordered*.
- reservations with status W  
The data on reservations of copies, which were prepared for collection by member using the **To shelf (W)** method, is displayed. The reservation status is *waiting on the shelf (W)* and the material status is *W – waiting (reservation)*.
- missing material  
The data on reservations of copies of material, which you could not find on the shelf and which you marked by clicking the **No material** button, is shown. The reservation status is *missing material* and the material status is *O – ordered*.
- all reservations  
The data on all reservations of material with the status *O – ordered* and status *W – waiting (reservation)* is displayed.
- reservation cancellations  
The data on cancelled reservations, which still need to be processed, is displayed. Find the reserved material, for which the reservation was cancelled, and return it to its spot on the

shelf. Then, select the **End processing** option. If there are further reservations for the material, for which a reservation was cancelled, first finish the processing of the cancelled reservation and then process the new reservation.

### 3.4 Switching between individual reservation processing spots

You can quickly switch between individual reservation processing spots by clicking the **Reservation processing spot** button. This will open a list of reservation processing spots, where you select the spot in which you want to continue working. If the selected spot is in another department, the transition to another department will also be made automatically.

## 4 Creating new reservation processing spots and editing data on reservation processing spots

Editing data on reservation processing spots and creating new spots is tied to the *ADM\_PARTNER* privilege. You can add new reservation processing spots in the home library data.

In the **Home library** editor, the **Reservation processing spots** option has been added to the **Details** tab.

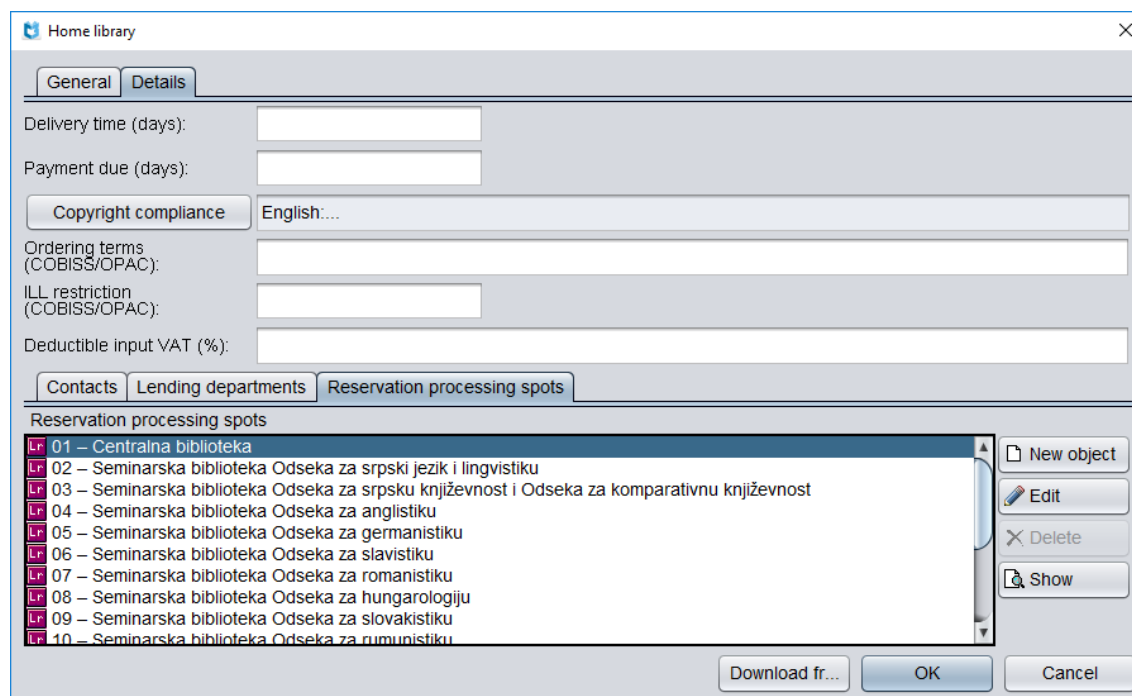
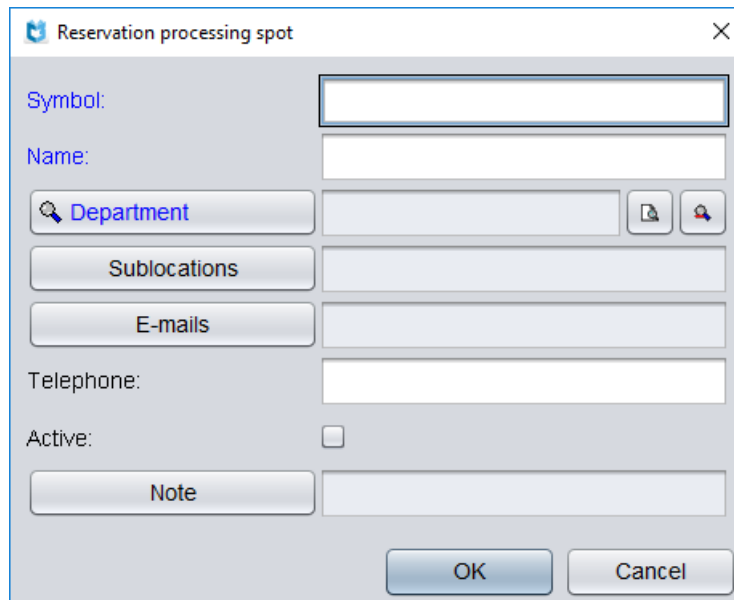


Image 12: Home library – reservation processing spots

If you want to add a new reservation processing spot, click the **New object** button. This will open the **Reservation processing spot** editor window.



**Image 13: Reservation processing spot data**

Enter or edit the data:

- **Symbol** (define the symbol of the reservation processing spot, e.g. SKL01),
- **Name** (enter the name of the spot, e.g. closed stacks in department 01),
- **Department** (clicking the button will open the department search window, where you find and select the department, to which the reservation processing spot belongs),
- **Sublocations** (specify material sublocations, for which you will be processing reservations at this spot),  
**NOTE:** each sublocation can only belong to one reservation processing spot,
- **E-mails** (enter the e-mail address (or addresses), at which you want to receive e-mail when a member reserves an available copy of material or cancels a reservation),
- **Telephone** (enter the telephone number – the data is used for information purposes only)
- **Active** (designate if the reservation processing spot is active or not; the spot cannot be deleted – if you will no longer use it, uncheck this box),
- **Note** (enter a custom note about this spot).

Save the reservation processing spot data by clicking the **OK** button.

You can also edit the data on an individual spot if you transfer the reservation processing spot to the workspace and click the **Edit** button. A window will open, where you can edit the data.