



How to Set Up Advance Bookings and Short Loans

Releases 14.2 and later

Last update: March 25, 2002

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1 Functionality

1.1 Introduction

Many libraries maintain a reserve collection from which patrons may borrow items on a short-term basis (for example, for one or two hours). The library can set up a booking schedule, and patrons may request to borrow an item during one of the time slots available in the schedule through the Web OPAC interface. After requesting the item, the patron goes to the circulation desk of the reserve item collection and the librarian loans the requested item to the patron.

The following terms are used interchangeably throughout the system:

- ☐ Reserved Items
- ☐ Short Loan
- ☐ Advance Booking

All three stand for the same functionality. There are two aspects to the functionality:

1. Items are on loan for certain periods during the day and also overnight. For example, an item can be loaned for two-hour intervals during the day and for the night.
2. Short loan items can be reserved by patrons in advance. A patron reserves the item for a specific slot during the day or overnight.

The special feature of the Advance Booking functionality is that the patron can place a hold request in advance for a specific time slot. If the loan periods are divided into 2-hour intervals from 9am to 11am, from 11am to 1pm etc., the patron can place a request for one of the short loan items for a slot beginning tomorrow at 9am.

Depending on the set up, done according to the library's policy, a patron can place a reservation up to two weeks in advance. The number of days in advance depends on the library's setup (the `www_item_schedule` line in `www_server_defaults`).

The length of each slot during the day can be changed according to the library's policy and you can even set up a day slot and night slot. Items can also be defined as not for loan during the night. You cannot loan an item or make a reservation in a time period which has not been defined.

Advance booking can be performed only through the Web OPAC, not in GUI Search or in the GUI Circulation client.

When a patron requests a reserve item for a particular time slot using the Web OPAC, an entry is made in the schedule for that patron, and the item is reserved for him for the requested time slot. (If a preview period has been set, the patron may receive the item from the checkout desk during the preview period if the item is available.)

After a patron requests a reserve item, the list of holdings in the Web OPAC indicates that this item has been "Requested." The number of copies held by the library and the number that are currently requested are both indicated in the Web OPAC.

Note: The user does not request a specific copy; his request is per Bibliographic Record Number and he receives whichever copy is available (as long as it has the "reserve item" status).

The system keeps requests for reserve items separately from regular hold requests. Each has its own Oracle database table.

When the patron has "N" for the privilege of multiple hold requests, he is allowed to place one hold request (reservation) during the day, and if one time slot is 24 hours long, the user may not request the same material for two days in a row. If he has "Y" for this privilege, then he is allowed to place as many requests as he likes for the same item

Note: The library patron is not required to request reserve items through the Web OPAC in order to be able to borrow the material. He may simply go to the Reserve Item Circulation Desk and ask to be handed the material in person. If the material is available, the librarian can loan it immediately.

If an item is defined as a short loan item, clicking on the request link in the WEB OPAC displays a form that is different from the regular request form. This form contains a short loan table that enables the patron to place a request for advance booking of short loan items.



From	To	Requests
Wednesday 17/11/99	09:00 12:00	All items requested (1)
	12:00 17:00	request (0/1)
	17:00 09:00 Thursday 18/11/99	request (0/1)
Thursday 18/11/99	09:00 12:00	request (0/1)
	12:00 17:00	request (0/1)
	17:00 09:00 Friday 19/11/99	request (0/1)
Friday 19/11/99	09:00 12:00	request (0/1)
	12:00 17:00	request (0/1)
	17:00 09:00 Sunday 21/11/99	request (0/1)
Sunday 21/11/99	09:00 12:00	request (0/1)

Figure 1: The Short Loan Form in Web OPAC

Notice that the user is able to reserve the item for any of the slots, even for over the weekend.

1.2 HTML files relating to Advance Booking

The following files are used for the display of the Advance Booking functionality in the WEB OPAC:

Advance Booking Schedule under the User:

- ☐ bor-item-schedule-body
- ☐ bor-item-schedule-head
- ☐ bor-item-schedule-tail
- ☐ bor-item-schedule-exp
- ☐ bor-item-schedule-exp-1
- ☐ bor-item-schedule-exp-close
- ☐ bor-item-schedule-no-hold

Placing Advance Booking request:

- ☐ item-schedule-0
- ☐ item-schedule-1
- ☐ item-schedule-
- ☐ item-schedule-9
- ☐ item-schedule-body
- ☐ item-schedule-head
- ☐ item-schedule-tail
- ☐ item-schedule-title

In order to modify the display, edit these files. Be sure to maintain the sections that import the data from the program and edit only those sections that set the display.

Note: The examples shown in this document are taken from the USM demo library. All the parameters shown here can be changed according to the library's policy.

2 Set Up

2.1 Item status for short loan (tab 15, tab 37)

Short loan items must have their own unique status. The status must be:

- ☐ Requestable ("Y" on column 8 of **tab15.lng**)
- ☐ Requestable (listed in tab37)
- ☐ Non-renewable ("N" on column 7 of **tab15.lng**)

2.2 Time Slots (tab43)

Tab43 defines time slots for short loan items. The parameters are set as follows:

- Column 1. **Sub-library** - The sub-library in which the defined status will be used as a short loan item status. Use ##### for "any" sublibrary.
- Column 2. **Item Status** - The item status that will be used as a short loan status.
- Column 3. **End of Period Date** - The date until which you want the definition to be valid. It is possible to create several sets of definitions where each is valid over a different period of time.
- Column 4. **Beginning of time slot - Day** - This is the starting point of each slot. Every group of definitions can start on any day of the week according to the days when the library is open. In the following example, the first time slot begins on Monday = 01.
- Column 5. **Beginning of time slot - Hour** - The starting hour of each time slot.
- Column 6. **End of time slot - Day** - The end of the time slot. Slots that begin and end on the same day, will have the same **Beginning of time slot - Day** and **End of time slot - Day**. The overnight slot's **End of time slot - Day** will be one more than the **Beginning of time slot - Day**.

This parameter is set according to the number of days that have passed since Sunday. For example Sunday is 00, Monday is 01, and Monday a week later is 08.

- Column 7. **End of time slot - Hour** - The end hour of each time slot.

2.2.1 Example 1

1	2	3	4	5	6	7
USLINC 25	<u>20010601</u>	01	0900	01	1200;	----- <u>20010601</u> is the date until which the
		01	1200	01	1700;	following section is valid.
		01	1700	02	0900;	
		02	0900	02	1200;	
		02	1200	02	1700;	
		02	1700	03	0900;	
		03	0900	03	1200;	
		03	1200	03	1700;	
		03	1700	04	0900;	
		04	0900	04	1200;	
		04	1200	04	1700;	
		04	1700	05	0900;	
		05	0900	05	1200;	

```
05 1200 05 1700;
05 1700 06 0900;
06 0900 06 1200;
06 1200 06 1700;
06 1700 08 0900;
```

Notice that the last slot is defined as 08. This means that this specific slot starts on Saturday at 17:00 and ends on Monday (08 days since the previous Sunday) at 09:00.

2.3 Setting Advance Booking Period

2.3.1 `setenv www_item_schedule`

The display of the slots is always from the current day onwards. By default, a patron can order a short loan item up to two weeks in advance. The system is set to show two weeks every time but to open the schedule for 4 weeks, in order to prevent time laps between the two time factors.

The number of days in advance for which slots display (thereby setting the number of days in advance that a patron can request an item) are set in the **www_server_defaults** file in the **alephe** directory, and can be changed according to the library's policy:

```
setenv www_item_schedule                      14
```

2.4 Preview Period (Relationship to Current Time Slot)

2.4.1 `pc_server_defaults` Settings

In the Circulation module in the main menu, under **Circulation/ Reserve items**, you can see the request a patron has placed on a specific item and you can perform the actual loan. Note that you can see the "current" request he placed or all his requests according to the check box.

The "Current" slot is defined according to the preview period and the time slot itself. For example, according to the library's setup, the request can be seen for 30 minutes before the beginning of the time slot. This parameter can be set or changed in the **pc_server_defaults** file in the **alephe** directory:

```
setenv item_schedule_preview_period              00:30
```

When loaning a short loan item without placing a reservation first, the item is loaned for the current time slot available if the item has not been requested. The "current" slot is the actual time slot, expanded backwards by the preview period that is set in **pc_server_defaults**.

The preview period is the amount of time before the beginning the next time slot to be considered as part of that time slot. For example, a patron comes 15 minutes before the beginning of a time slot, and the preview period is set to 30 minutes. If the item is not requested, it is loaned through the next slot.

When you run the **Delete Reserve Item Schedules** procedure (**cir-61**), you need to enter a date in the **Latest date for schedule to be deleted** field. All reservations up to and including that date will be deleted. Bookings for the current day and the two preceding days cannot be deleted.

The procedure deletes inactive reservations up to the day you run it. If you enter an advance date, the procedure disregards it and deletes only the reservation up to the day you run the procedure. This procedure decreases the size of your file.

3.1.4 Delete Reserve Item Slots - Advance Booking (cir-65)

Advance booking slots are opened to the end of the week in which the "to-date" falls. There are cases, such as holidays and other blocks of days during which the library is closed, where you might want to remove slots that were created by p-cir-60. You can do this by running the "p_cir_65" procedure. In release 14.2 this procedure must be run from the Unix prompt as follows:

```
csh -f p_cir_65 USM50,from-date,from-hour,to-date,to-hour
```

Example:

```
csh -f p_cir_65 USM50,20001128,1330,20001130,0930
```

In this example, all slots between Nov. 28th 13:30 and Nov. 30th 09:30 are deleted, and a new slot is created for the whole period. The new slot will include the last slot before the period and the first slot after the period.

In version 15 and higher, the service cir-65 is available from the Circulation module GUI Services menu.

3.2 Course Reading Services

There are also services in the Course Reading module which are related to Short Loan management:

3.2.1 Print Pickup List

This is a report of items that should be transferred to the Reserve Short Loan collection, based on the date the course begins.

3.2.2 Reserve Reading Items Report

This is a report of items registered to a course which is no longer active (to assist the librarian in removing items from the Reserve / Short Loan collection).

4 Internal Structure

4.1 Z320 and Z321

At the end of a certain period (such as the end of a semester, when all items are removed from Reserve), you might want to clean up your files by dropping these two Oracle tables. Dropping the tables deletes all reservations.

A **Z321** record is created for each item (**Z30**) that is defined as a short loan copy. The **z321_date_list** parameter defines the date until which time slots open for the item.

4.1.1 Example:

```
01 z321 \  
  02 z321_rec_key \  
    03 doc_number .....000000120  
    03 item_sequence ....000010  
  02 z321_sub_library ...ULINC  
  02 z321_item_status ...60  
  02 z321_item_number ...00730  
  02 z321_date_last .....2001061212
```

The **Z320** table holds information regarding the reserve item schedule. If the item is requested or loaned, This includes the patron's ID (**z320_id**) for the item slot.

4.1.2 Example:

```
01 z320 \  
  02 z320_rec_key \  
    03 item_number .....00003  
    03 sequence .....000010  
  02 z320_id .....2441309  
  02 z320_barcode .....  
  02 z320_status .....  
  02 z320_start_date ...19991117  
  02 z320_start_hour ...0900  
  02 z320_end_date .....19991117  
  02 z320_end_hour .....1200
```

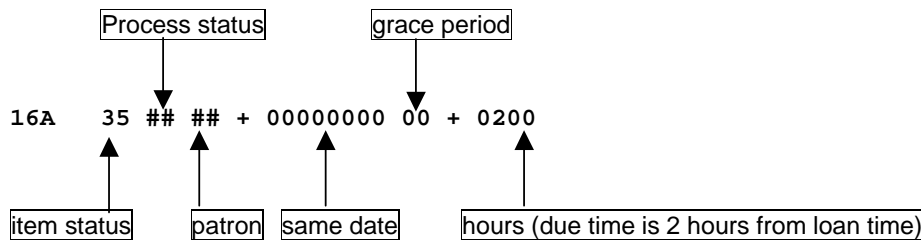
After the two tables are dropped (using **UTIL A/17/1**), run **cir-60** (Open Reserve Item Schedules) again in order to reopen the reserve item schedule for future reservations. The two Oracle tables will be created automatically when you run **cir-60**.

5 Operating Scenarios

Libraries can decide to set up short loan functionality in different ways:

1. In the above example time slots are set for short loans during the day and for overnight. The slots can be defined for different lengths of time.
2. A library can also choose to set the short loan functionality as follows:

Advance booking of the item for overnight loan is allowed, and the item is loaned according to a defined overnight time slot. During the day, the item is loaned for a given period (for example two hours), and not according to pre-defined slots, and cannot be booked.. The day loan is set in **tab16** as shown in the example below:



The overnight booking is set in **tab43** as described above.

There could be a problem when the day loan approaches the time of the overnight reservation, for example, when the overnight loan starts at 17:00 and a patron comes to loan the item at 16:00. The item should be returned at 17:00 and not at 18:00 as it will be using tab16.

The solution can be set as follows:

1. Set two **tab16** tables called tab 16.1 and tab 16.2. The first one will include the definitions for the two-hour loan periods during the day:

```
16A 35 ## ## + 00000000 00 + 0200
```

For the item status “35”, the item is loaned for 2 hours.

2. The other **tab16** table will define for the same item status an actual due hour at 09:30:

```
16A 35 ## ## + 00000000 00 A 0930
```

In \$alephe_proc there are two procedures, which switch between the tables. In \$alephe_tab/job_list, list the \$aleph_proc/p_switch_tab16_1 and p_switch_tab16_2 procedures on the relevant days at the relevant times. This can be done using UTIL E/15/1:

```
W1 05:00 Y tab16_1.log      csh -f /aleph/proc/p_switch_tab16_1
W1 15:00 Y tab16_2.log      csh -f /aleph/proc/p_switch_tab16_2
```

The above settings will run the procedure that switches between the tab16 tables, at 05:00 and at 15:00, respectively.