

TECHNOLOGY FORUM PAPER

Effectively Managing Reserves and Holds

Written by Ted Koppel, Product Manager, VERSO®

“How can I get a copy of that new book by James Patterson when all the library’s copies are charged out?”

“I heard that Lee Child’s new mystery is being published on November 15 – how can I get myself on the list for a library copy?”

“I have a report due in two weeks – the one book I need is over at South Branch, and that’s 15 miles away and I’m too young to drive! Can you help me?”

Questions like these are asked dozens of times each day at public libraries. Library users want an item, often a book, that isn’t immediately available on shelf for checkout. Sometimes the item is on shelf and available - but physically located at another library branch. Often, a book or other item is checked out to someone else. Sometimes the user wants something that hasn’t yet been published.

Libraries make positive impressions on users when the libraries provide valued services in a timely and efficient manner. And library users understand that books aren’t always immediately available on shelf. The library’s skill at serving the user in this situation is a major factor in the user’s perception of the library’s value. To competently satisfy library users’ needs for items not immediately available, libraries and library systems have developed Reserves or Holds Management systems. Easily reserving an item, fairly managing the fulfillment delivery function, and efficiently satisfying the user’s needs, are three closely related processes that enable the library to show its skill, effectiveness and value to library users.

VERSO, Auto-Graphics’ Integrated Library System, enables the user to manage his/her reserves, and provides library staff with a wide range of tools for managing the reserves process and delivering the requested item to the user.

Specific Item	Location	Call Number	Barcode	Status
<input type="checkbox"/>	East Mill Library - Adult - Non-Fiction	DVD F PRIS	274326	Available
<input type="checkbox"/>	East Mill Library - Adult - Non-Fiction	DVD F PRIS	274327	Available
<input type="checkbox"/>	East Mill Library - Adult - Non-Fiction	DVD F PRIS	274328	Available
<input type="checkbox"/>	East Mill Library - Adult - Non-Fiction	DVD F PRIS	274329	Available
<input type="checkbox"/>	East Mill Library - Adult - Non-Fiction	DVD F PRIS	274330	Available
<input type="checkbox"/>	East Mill Library - Adult - Non-Fiction	DVD F PRIS	274331	Available
<input type="checkbox"/>	East Mill Library - Adult - Non-Fiction	DVD F PRIS	274332	Available
<input type="checkbox"/>	East Mill Library - Adult - Non-Fiction	DVD F PRIS	274333	Available
<input type="checkbox"/>	East Mill Library - Adult - Non-Fiction	DVD F PRIS	274334	Available
<input type="checkbox"/>	East Mill Library - Adult - Non-Fiction	DVD F PRIS	274335	Available

Users can easily select the item they would like to reserve as well as the pickup location and provide reserve notes for the library staff.

USER Self Empowerment in the Reserves Process through Illuminar

- Library users can place reserve requests for any title in the library catalog, either at the library or at home from any web-enabled computer (subject to library policies).
- Library users can reserve library materials by title (for example: any copy of the latest best seller by their favorite author)
- Library users can reserve library materials by a specific copy or volume (for example: volume two of a four volume set on Bullfinch’s History of Mythology)
- Library users can reserve specific issues or volume of a series (for example: Season 3 of the classic TV drama St. Elsewhere)
- Library users can see how many reserves are ahead

of them in the reserve request queue (which may give them some indication of how long it will take to receive that item)

- Library users can view the status of all of their Reserves while logged in from home, looking at the My Account display. Users can:
 - View and sort their requests
 - See what place they are in the reserve queue
 - See if their items are available for pickup at the library
 - Send messages to library staff about a reserve (and read replies from library staff)
 - Depending on library policy, users can place reserves for items owned by their library only, or from other libraries within a consortium
- Users can be notified via email or telephone when a reserve is available for pickup at the library.
- Reserves can also be suspended if a users knows they will be gone for an extended period of time; such as being on vacation . When the reserve is reactivated the patron goes back in the reserve queue in the same order that they were at the time the reserve was suspended.

STAFF / Administrative Control of the Reserves Process using VERSO

- Library staff can place reserves on items on behalf of users who are unable or unwilling to do it themselves
- Circulation librarians have access to all Reserves management functions from a single menu
- Library staff can choose to display all reserves, either globally or by individual branch (if in a consortium)
- When viewing reserves, library staff can change the order of the reserves queue (with sufficient permission)
- When viewing reserves, library staff can reply to messages sent by library users about their reserves

Home : Aspen Grove Library

VIEW ALL RESERVES WITH AVAILABLE COPIES [Print](#) [Close](#) [Help](#)

Reserves with Available Copies

Filter by: Blue Creek Library - Blue Creek Library

Sort by: Call Number

Title	Call Number	Author	Action
The World almanac and book of facts.	317.3 WORL	World (New York, N.Y. : 1883)	View Reserves
3 available copies Blue Creek Library - Adult - Non-Fiction	1. mhcpatron 2. mhcpatron10	Jane Doe John Doe	
Folk art : imaginative works from American hands.	746.0973 FOLK	Time-Life Books.	View Reserves
1 available copy Blue Creek Library - Adult - Non-Fiction	1. 3333	Cammy Flaugs	
Zydeco!	781.6241 SAND	Sarndel, Ben.	View Reserves
1 available copy Blue Creek Library - Adult - Non-Fiction	1. 1236	Moody Blues	
The very quiet cricket	E CARL	Carle, Eric	View Reserves
1 available copy Blue Creek Library - Preschool - Parenting Collection	1. mhcpatron	Jane Doe	
Goin' someplace special	E MCRI	McKissack, Pat	View Reserves
1 available copy Blue Creek Library - Preschool - Parenting Collection	1. 3333	Cammy Flaugs	
Animals and the new zoos	J 690.744 CURT	Curtis, Patricia	View Reserves
1 available copy Blue Creek Library - Juvenile - Non-Fiction	1. 3333	Cammy Flaugs	
Here we all are	JIB DE PA D4	DePaola, Tomie	View Reserves
1 available copy Blue Creek Library - Juvenile - Non-Fiction	1. 28112342042097	AMELIA AALBERTSBERG	
Meet Addy : an American girl	JF PB PORT v.1	Porter, Connie Rose	View Reserves
2 available copies Blue Creek Library - Juvenile - Non-Fiction	1. 3333	Cammy Flaugs	

Staff can view all and print all reserves with Available copies on one easy-to-use screen.

- Library staff can view and print a report of Reserves with Available Copies at their branch, which acts as a 'pick list' for pulling items off the shelf to fill reserves requests
- Library staff can view and print reports of Expired Reserves that were never picked up Library staff can view and print reports of reserved titles that are in-transit (either from other libraries or branches to the staff person's location, or to another library or branch)
- Library staff can cancel reserves
- Library staff can re-route items sent to fulfill reserve requests to a different pickup branch
- Library staff can intercept items sent to fulfill reserves requests, to send to mending or repair, without affecting the reserves queue
- If the library has created multiple bibliographic records that refer to the same title, VERSO's Bib Merge capability allows the library to merge the two bibliographic records, consolidate item records for the two bibliographic records, and merge any existing reserves for the two bibliographic records, retaining the chronological order in which the reserves were originally taken.

CONCLUSION

Reserves management and successful delivery, integrated with other library operations such as generous circulation policies, wise selection and acquisitions practices, and efficient transportation, show the library at its best – being responsive to the needs of its users. VERSO empowers users to place reserves for the titles they want, and gives powerful tools to the library to manage those reserves and provide value to the library customer.

About the Author

Ted Koppel, Product Manager, VERSO®

Mr. Koppel has served in the technology and technical services industry for over 31 years. Prior to joining A-G, Mr. Koppel served as the chief product developer for the UnCover online index and delivery system for CARL Corporation. He has also served on and co-chaired numerous committees for the National Information Standards Organization (NISO) where he is currently the Leader of the Content and Collection management Topic Committee. Mr. Koppel holds a Bachelor of Science from Georgetown University and a Masters of Science (MS) in Library and Information Science from Case Western Reserve University.

