PLACING A RESERVE & PROCESSING RESERVES

In this cue card, we will be covering how to create a reserve and then how to process reserves at your local library or through an internal ILL.

RESERVING ITEMS

THROUGH 'SEARCH > SIMPLE' OR 'SEARCH > ADVANCED'

1. Search for an item in **Search > Simple** or **Search > Advanced**.
   1.1. Select the **Union** radio button to search for items in the union.
2. Click **Reserve** and scan or type in the patron barcode, then click **OK**.
   2.1. If the **Reserve Copy** button is enabled for your system, you can select the specific copy to reserve and click **Reserve Copy**.
3. Choose the library the reserve will be picked up at.
4. Click **OK** to finalize.
5. The request will generate an **Alert** for the owning library in **Alerts > Reserve List**.

THROUGH 'CIRCULATION > CHECK OUT'

1. In **Circulation > Check Out > Check Out**, select the **Reserve** tab.
2. Click the **Find** button located beside the Copy Barcode field (magnifying glass).
   2.1. In the pop-up window, select **Other Libraries In Union** to include items in the union in the results.
3. Search for the item by using the search criteria, then click **Search**.
4. Select the item from the search results and click **Reserve**.
   4.1. If the **Reserve Copy** button is enabled for your system, you can select the specific copy to reserve and click **Reserve Copy**.
5. Choose the library the reserve will be picked up at.
6. Click **OK** to finalize.
7. The request will generate an **Alert** for the owning library in **Alerts > Reserve List**.

THROUGH THE OPAC

1. Search for the item at the local library or use All Libraries in the dropdown menu.
2. Click **Reserve**.
3. Select the Pickup At library and click **Reserve**.
4. The request will generate an **Alert** for the owning library in **Alerts > Reserve List**.

PROCESSING RESERVE REQUESTS IN THE ILS

'ALERTS > RESERVE LIST'

1. By default, the **Alerts > Reserve List** shows items that are ready to be pulled from the library shelves (Reserved – On Library Shelves Now).
2. After the copy is retrieved from the shelf, scan the barcode into the **Scan Copy to Process Reserve** field and click Confirm. If your scanner has an auto-enter key set up after each scan, you do not need to click Confirm. You can also use **Circulation > Check In** for the reserve confirmation step as it will provide the same prompts.
   2.1. If the reserve is for a patron at the local library, the status of the reserve will change to "Pickup Shelf" and you will be prompted to print a reserve slip.
   2.2. If the reserve is going to a patron at another library, the reserve status will change to "Outbound" and you will be prompted to confirm the transfer and print a transfer slip.

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AT THE RECEIVING LIBRARY (IF IT IS AN INTERNAL ILL)

At the receiving library, the requested item is scanned through **Circulation > Check In** to make it available for the patron. You will be prompted to confirm the item to be put on reserve for the patron/print a reserve slip. The reserve status will change to "Pickup Shelf".

CIRCULATION AND RETURN

CHECK OUT

The patron will arrive at the library to pick up their reserve. In **Circulation > Check Out > Check Out**, open the patron's account. You should receive a prompt that they have a reserve available for pickup. Scan the barcode to check the reserve out to the patron.

CHECK IN

1. When the item is returned to the library, check it in through **Circulation > Check In**.
2. If the item was from another library, you will be prompted to transfer it back to the owning library.
    2.1. When the owning library receives the item, they will check in in through **Circulation > Check In**, which will change the item status back to "In".
3. If the item is from the local library, the item status will change to "In".
4. If the item is on reserve for another patron in the system, you will receive a prompt to place it on the pickup shelf if it is for a patron at your library, or transfer it to another library in the system if the reserve is being picked up at another library.