

Reserve Bookroom

**In
Horizon**

Updated 7/07

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Placing Materials On Reserve

In Reserve Bookroom, you may create Instructor, Course, Title (short bib) and Item records. You can reserve items for any instructor who is associated with a course. Before you can reserve items for an instructor, you must link one or more courses to the instructor. You can have more than one instructor linked to the same course. Students can search for reserve items based on the instructor's name, the course name or standard searchable fields, such as author, title, ISBN, etc.

Please use standard naming/capitalization/punctuation conventions, specific to your location when inputting data within the Reserve module. Remember many of the fields display to the public and are searchable. Colleges are responsible for maintenance of the instructor, course and item records within the reserve module. Once short bib records are entered, only LTS can make changes to the MARC record. Use standard cataloging practice when inputting short bib records and verify entries before saving. Only use fields as designated: edition for edition statement, ISBN for the ISBN number, etc.

Circulation privileges (loan periods, fine rates, notices, renewals, etc.) within Reserve are setup differently from the normal collection. Item types (itypes) are based on loan period within reserve room, not on the type of material (format).

Basic Steps Overview

Login to Horizon using the Reserve Login (username/password) for your location, **or** Change Location to Reserve Room for your location if you are already logged in (ie. *GateWay CC* to *GateWay CC Reserve Room*).

Open the *Reserve Bookroom* folder from the Navigation bar.

To set Session Defaults (Optional), click on *Set Defaults*.

Check for existing or Create new Course Record(s).

Check for existing or Create new Instructor Record(s).

Link Course(s) to Instructor(s).

Add Titles & Items to Reserve.

Link Title(s) to Course/Instructor.

Place Item(s) on Reserve.

Circulate Items from Main location or Reserve Room Location.

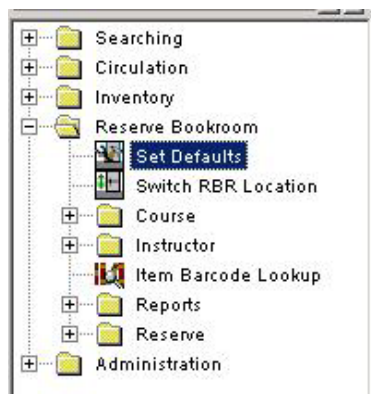
Using Session Defaults [Optional]

A session is the current period of time you are logged in to the Reserve Bookroom. *Session defaults* can be set to apply the same reserve information across numerous items.

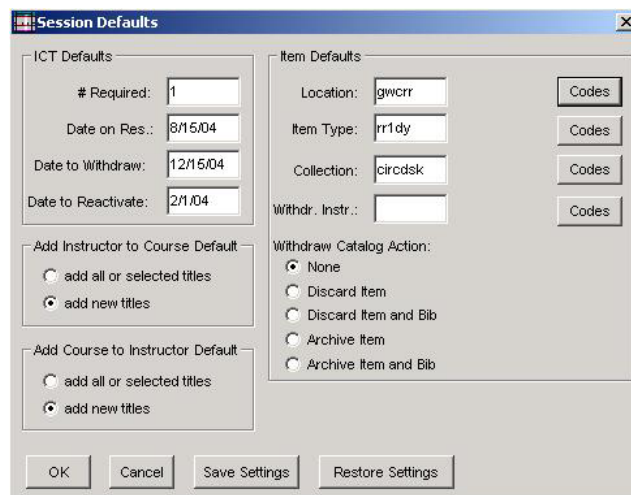
You can save your settings for future sessions. Defaults are automatically applied to Instructor/Course records. ***You can change the defaults as you work with individual reserve records.***

SETTING SESSION DEFAULTS

- 1) Open the *Reserve Bookroom* folder from the Navigation bar.



- 2) Double-click on *Set Defaults* to open the *Session Defaults* window.

A screenshot of the 'Session Defaults' dialog box. It is divided into two main sections: 'ICT Defaults' and 'Item Defaults'.
ICT Defaults:
- # Required: 1
- Date on Res.: 8/15/04
- Date to Withdraw: 12/15/04
- Date to Reactivate: 2/1/04
- Add Instructor to Course Default: add all or selected titles, add new titles
- Add Course to Instructor Default: add all or selected titles, add new titles
Item Defaults:
- Location: gwcr (with Codes button)
- Item Type: rr1dy (with Codes button)
- Collection: circdsk (with Codes button)
- Withdr. Instr.: (empty field with Codes button)
- Withdraw Catalog Action: None, Discard Item, Discard Item and Bib, Archive Item, Archive Item and Bib
At the bottom are buttons for OK, Cancel, Save Settings, and Restore Settings.

- 3) Fill in the form and click *OK*.

There are no required fields—set some and leave others blank as desired.

Click the *Save Settings* button to save the settings.

Click the *Restore Settings* button to re-apply the permanent/saved default settings - if you change the settings for specific, individual records.

Session Default Fields

# Required	Number of copies to be placed on reserve for each titles.
Date on Res.	Date that the title will be placed on reserve (can be a future date).
Date to Withdraw	The date that the items need to be withdrawn from reserve. Day end will automatically change the status of the item to <i>inactive</i> after this date. <i>A date must be entered for instructor letters to print.</i>
Date to Reactivate	Enter the date that the items need to go back on reserve. After this date, Day end will automatically change the status of the item to <i>active</i> .
Add Instructor to Course Default	<p><i>Select one of the following:</i></p> <ul style="list-style-type: none"> ▪ <i>Add all or selected titles</i> – gives option to add some or all of the titles linked to an instructor when you add an instructor or course ▪ <i>Add new titles</i> – does not link an instructor to any title, when you add an instructor to a course
Add Course to Instructor Default	<p><i>Select one of the following:</i></p> <ul style="list-style-type: none"> ▪ <i>Add all or selected titles</i> – gives option to add some or all of the titles linked to a course when you add a course to an instructor ▪ <i>Add new titles</i> – does not link any titles to a course when you add a course to an instructor
Location [Note: Use Reserve location]	Enter the reserve location or select one of the reserve locations from <i>Codes</i> . Reserve locations have an rr suffix.
Item Type [Note: Use Reserve itypes only]	Enter a reserve itype or select from <i>Codes</i> . Reserve itypes have an rr prefix and are based on the loan period.
Collection	Enter the reserve location's collection code. Use the standard reserve collection for your college: <i>reserve, general, circulation desk, media, etc.</i>
Withdr. Instr.	<p>Select from the <i>Codes</i>:</p> <ul style="list-style-type: none"> ▪ rf Return material to owning faculty member ▪ rs Reshelve the material ▪ rl Review by librarian ▪ rd Reserve discard ▪ ro Return material to owning department ▪ sc Send to cataloging ▪ store Put in special reserve storage <p>If other codes desired, notify system administrator.</p>

Withdraw Catalog Action	<p>Choose one of these options:</p> <ul style="list-style-type: none"> ▪ <i>None</i> (Keeps both title & item in reserve upon withdrawal. Mark this option for all library-owned material to be returned to the Main location.) ▪ <i>Discard Item</i> (Deletes item from reserve & Horizon. Do not use if you plan to move the item back to the Main Location for circulation.) ▪ <i>Discard item & bib</i> (Deletes item and title record from Reserve & Horizon. Do not use if you plan to move the item back to the Main Location for circulation.) ▪ <i>Archive Item</i> (Use only for non-library owned materials that are to be used in reserve in the future. Do not use for library owned materials. Archiving such items removes the item record from the catalog and stores it in Reserve bookroom.) ▪ <i>Archive Item & Bib</i> (If more than one item is linked to the title, you cannot archive the title. Do not use for library owned materials. Archiving such items removes the item record from the catalog and stores it in Reserve bookroom. To restore, unarchive the item.)
SAVE Action	<ul style="list-style-type: none"> ▪ Click <i>OK</i> to set for this session only (temporary). ▪ Click <i>Save Settings</i> to retain until you click save settings again (semi-permanent).

Course Record (Required)

Includes course name /description /#of instructors that teach course.

Course can be interpreted in many ways, from the course prefix, down to the section number or at the higher program level. Horizon allows for reserve materials to be shared by instructors for various courses. You can assign more than one instructor to the same course.

TO SETUP OR CHANGE A COURSE RECORD

- 1) Open the *Reserve Bookroom* folder from the Navigation bar.
- 2) Open the Course folder, double-click on Search Course.
- 3) Search for the course using one of the options listed. Use an asterisk * as a wildcard if entering a partial search.
Entering just an * will pull up all of the courses.
- 4) Select the course you want. To make edits (if needed), click on the *Edit* button.
OR,
If the course is not found, click the *New* button to add a course.

- 5) Complete or edit the fields.
If the course has multiple names or sections:
 - At *Course Info*, click *New* to display a blank record
 - Enter the alternate name or section in the *Course Name* field
 - Complete the remaining fields
- 6) Click the *Save* button.

Location [The location within reserve book room]	Click on the <i>Codes</i> button to see options. Select the desired reserve book room location for your college.
Course/Name	Enter the name/prefix of the course.
Description	Enter a description/title of the course
Comment	Enter any additional information about the course, such as semesters taught, multiple sections, etc.
Group Description	If course has multiple names or sections, enter a description for the group of course names. [Defaults to information in the <i>Description</i> field above if not filled in.]

Instructor Record (Required)

Includes instructor's name, address, instructor number, etc. An instructor using reserve room does not need to have a borrower record in the system, but does need an instructor record within reserve bookroom setup.

TO SETUP OR CHANGE AN INSTRUCTOR RECORD

- 1) Open the *Reserve Bookroom* folder from the Navigation bar.
- 2) Open the Instructor folder, double-click on Search Instructor.
- 3) Search for the instructor using one of the options listed. Use an asterisk * as a wildcard if entering a partial search.
Entering just an * will pull up all of the instructors.
- 4) Select the instructor you want. To make edits (if needed), click on the *Edit* button to open the Edit Reserve Instructor window.

OR,

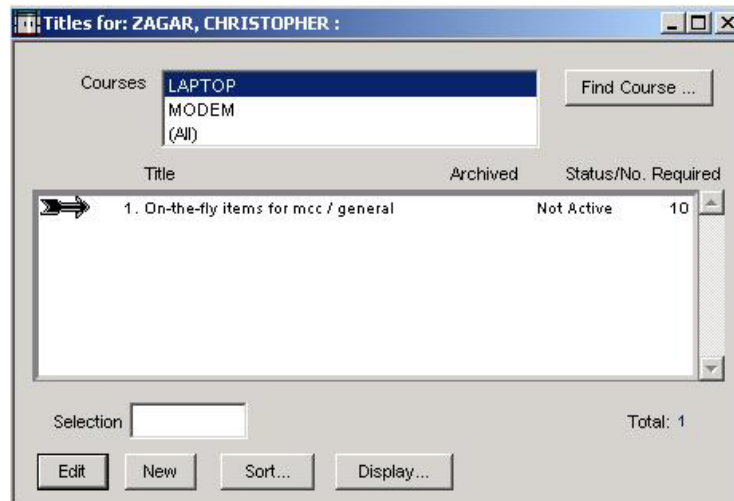
If the instructor is not found, click the *New* button to open the Edit Reserve Instructor window and add an instructor.

- 5) If adding a new instructor who has a Borrower record, you may choose to click the *Copy Borr.* button:
 - Search for the instructor at the Search window.
 - Select the correct record and click *OK*.
 - The Instructors name (only) is pulled in from the Borrower record.
- 6) Complete or edit the fields.
- 7) Click the *Save* button.

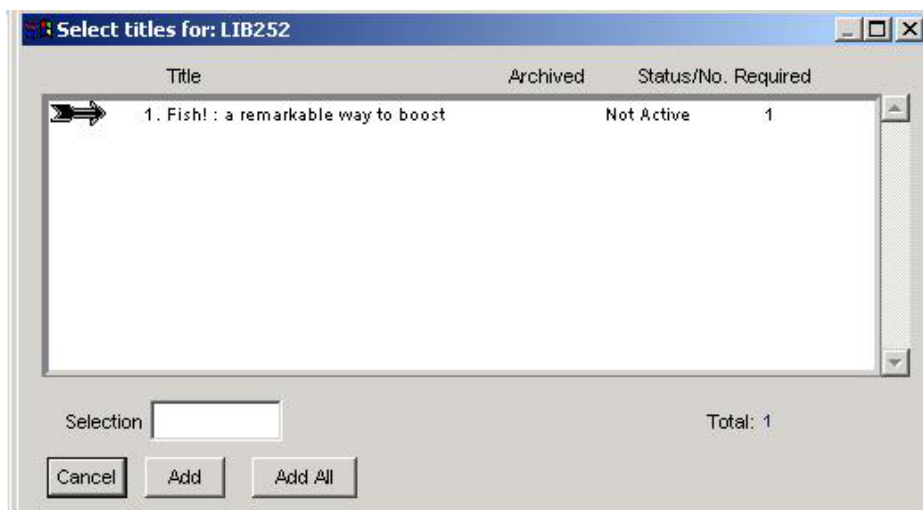
Name	Enter Last name, First. Use normal entry conventions for instructor entries.
Address Lines	3 lines provided; supply address information used for mailing instructor notices.
Comment	Enter any additional pertinent information about the instructor or contact information. Include phone number/ext., dept./room number, barcode, etc. for ease of access.

Adding a Course to an Instructor

- 1) Search for the instructor to whom you want to add a course.
- 2) Select the correct name from the list of instructor's displayed.
- 3) Click the *Titles* button to display the courses and titles linked to the instructor.



- 4) Click *Find Course*. The List Reserve Course window opens.
- 5) Select the course to add to the instructor.
- 6) Click the *Found* button.
If you entered Session Defaults, under Add Course to Instructor, and selected *Add all or selected titles*, then the window *Select Titles for: {Course Name}* opens.

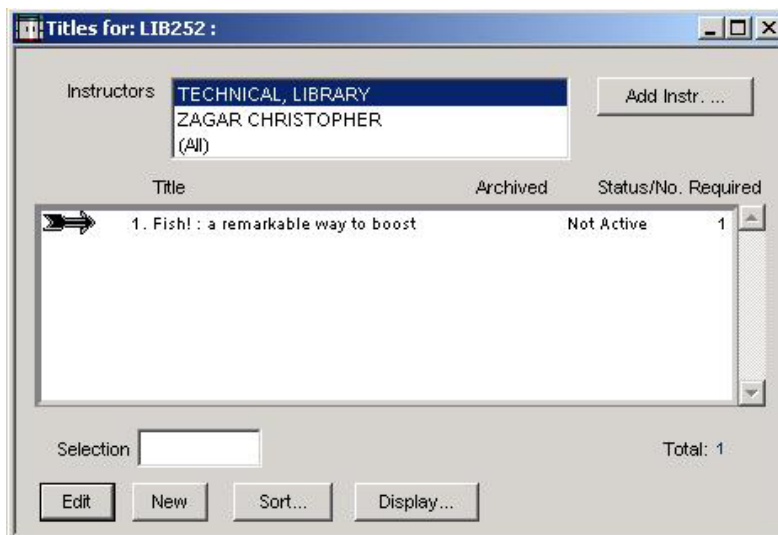


- 7) To link only certain titles to the instructor, highlight the titles and click *Add*.
OR, To link all of the titles, click *Add All*.

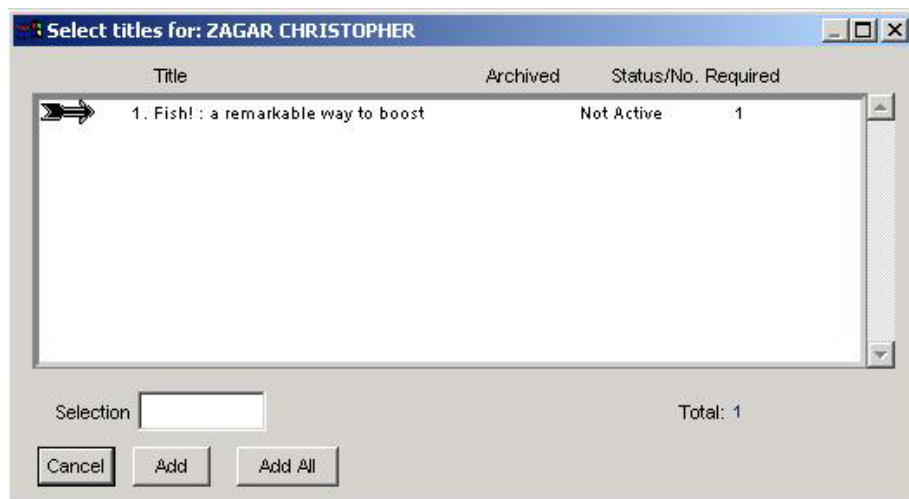
Adding an Instructor to a Course

If a course is taught by more than one instructor, you may link more than one instructor to the same course. You can reserve items for all instructors linked to a course.

- 1) Search for the course to which you are adding the instructor.
- 2) Select the course from the list of courses.
- 3) Click the *Titles* button to display the instructors and titles linked to the course.



- 4) Click the *Add Instr.* button.
- 5) From the *List Reserve Instructor* window, select the instructor to be added.
- 6) Click the *Found* button.
If you entered Session Defaults, under Add Instructor to Course, and selected *Add all or selected titles*, then the window *Select Titles for: {Instructor Name}* opens.



- 7) To link only certain titles to the instructor, highlight the titles, then click *Add*.
OR, To link all of the titles, click *Add All*.

Reserving Library Owned Items

After creating Instructor and Course records, you can now place items on reserve. Some may be from the library collection. Once you place an item on reserve, you can circulate reserve items according to the circ parameters set up for your location and the ITYPE of the reserve item. If a library-owned item is currently checked out and it is destined to be placed on reserve, you can flag the item for reserve. When the item is checked in, staff will be prompted to place the item on reserve.

*****SPECIAL HANDLING NOTE:** For Serial Titles, do not attach personal copies of periodical titles to an existing cataloged serial title. Create an issue-specific Short Bib record for use on Reserve instead. Use set input conventions for specific issue title entry. This will prevent problems with copy records for a serial title. See Section on *Reserving Other Items* for further instructions*****

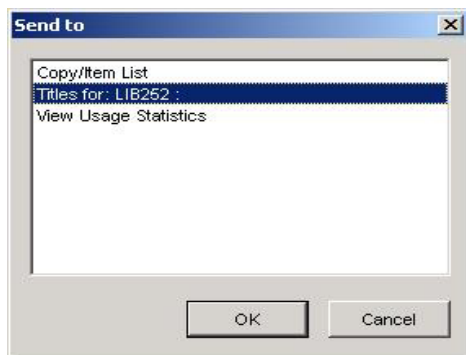
Before you can reserve items for an instructor, you need to link the titles of the items to a course that the instructor teaches. You can link existing titles from your collection to an instructor or course. Horizon creates an *Instructor/Course/Title (ICT)* record that links all three elements together. Users can then search for items by instructor, course or title.

CREATING A RESERVE TITLE RECORD

- 1) Select the course or the instructor to which you wish to link a title.
- 2) Click the *Titles* button.
- 3) Highlight the course or instructor to whom you wish to add titles. A title list displays for the linked instructor.
- 4) Click *New*. The *Identify a Title* window opens.



- 5) Click *Search PAC* and search for the title desired.
- 6) Highlight the title desired.
- 7) Press *F10*, or select *Edit/Send to* on the menu bar. The *Send To* window opens.



- 8) Double click on the Reserve process (Titles for: ...) to open the *Edit: Reserve Title* window. NOTE: Horizon supplies the default settings that were set up for the session.

Edit: Reserve Title

Title: Careers for writers & others who have a way with words /

Course: 452:125 1 of 1

Course Group: 125 LIB252

Instructor No.: 452 TECHNICAL, LIBRARY

No. Required:

Date: Res. Withdr. Reactiv.

Comment:

Status: Active Not Active

Copies Required: Active Not Active Provisional

Maximum Needed:

No. of Items: On Reserve At Other Locations Archived

- 9) Complete the fields/options:
- No. Required*: Number of copies of the title to be placed on reserve.
 - Reserve Date*: Date that the title will be placed on reserve. Can be a future date.
 - Withdrawal Date*: Date that the title will be withdrawn from reserve.
 - Reactivation Date*: Date that the title will be reactivated, placed on reserve again.
 - Comment* (255 character limit): Any additional information about the title.
 - Status*: Active OR Inactive.
 - *Active*: item placed on reserve and searchable by title
 - *Inactive*: item not to be placed on reserve or not searchable by title
 - Maximum Needed*: Maximum number of copies needed to place on reserve
- 10) Click the *Save* button. The title will be linked to the instructor and the course.

PLACING AN ITEM ON RESERVE [*A title record must be placed on reserve first]

When an item is placed on reserve, the item status is updated to “checked in” within the reserve location. When you withdraw the item from reserve, the owning location, itype, call number, and collection on the item record are restored to its prior values.

Reserving a Single Item

- 1) Double-click an active title record for the item to be placed on reserve (if needed, create a reserve title record for the item). From the *Edit Reserve Title* window.

Edit: Reserve Title

Title: Careers for writers & others who have a way with words /

Course: 452:125 1 of 1

Course Group: 125 LIB252

Instructor No.: 452 TECHNICAL, LIBRARY

No. Required:

Date: Res. Withdr. Reactiv.

Comment:

Status: Active Not Active

Copies Required: Active 12 Not Active 0 Provisional 0

Maximum Needed:

No. of Items: On Reserve 0 At Other Locations 1 Archived 0

- 2) Click the *Items* button to list all of the items for this title.
- 3) Highlight the item that you wish to place on reserve.

Items for: Careers for writers & others who have a way with words ...

Location/Copy/Status/Collection	Call No.	Price
1. Paradise Valley CC Library Career & College Checked In	PN151 .B62 2003	10.38

Selection: Total: 1

- 4) Click *Place on Reserve*. The *Edit: Saved Item Variables* window opens. If you set up session defaults, some fields may be auto-filled. Verify values entered.

Edit: Saved Item Variables

Item no. 587370 Barcode 0009912025260

Item status i Checked In

Location pvc Paradise Valley CC Library

Item type bk Book

Collection carcoll Career & College

Call no. PN151 .B62 2003 Call Type

Reserve: Location mccrr Mesa CC Reserve Room

Item type Reserve Room 3 hour

Collection Pamphlet

Call

Saved Call Type Copy Stmt

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- 5) Complete or update the fields:
 - Item Type* (itype): Enter the reserve room itype (itypes with the prefix **rr**, followed by the loan period). Click Codes to choose from the list.
 - Collection*: Enter the reserve room collection for your location (may be reserve, general or circulation desk). Click Codes to choose from the list.
 - Call*: Enter the Reserve room call number for this item for your location. This may be different than the LC call number originally assigned, based on how it is shelved while on Reserve, i.e. by Instructor, Course, RESERVE etc. The call number will revert back to its saved value.
 - Copy Stmt.*: Enter volume information here.
 - Check In Note*: Enter a note to display for Staff who check in this item
- 6) Click *Save*. The item is now checked in to the reserve location and available for circulation.

Reserving a Group of Items

If you have numerous items to be placed on reserve, and the Title records have already been created for each item, you can place the items on reserve all at one time.

- 1) On the Navigation bar, click Reserve Bookroom/Reserve/Place Items on Reserve.



- 2) Scan or manually enter the item's barcode. Click OK.
- 3) The *Edit Saved Item Variables* window displays.
 - If session defaults were set up, some fields may autofill. Verify values.
- 4) Complete or update the fields.
- 5) Click *Save*. The Item is added to the list of reserve items.

Flagging Items For Reserve

When you flag an item for reserve, the item's status is changed to "**rb**", and is added to the *Pick List*. Use the *Pick List* to retrieve items.

- 1) Search for the instructor or course linked to the title that you want to reserve.
- 2) Highlight the course or instructor with the title desired.
- 3) Click *Edit*.
- 4) Click *Items*. Highlight the item you wish to flag for reserve.
- 5) Click *Flag for Reserve*. The *Edit Saved Item Variables* window opens.
 - Horizon applies session defaults, and may autofill some fields. Verify data.
- 6) Click the *Save* button. When the item becomes available, place it on reserve.

Reserving Other Items (Creating Short Bib Records)

For items that the library does not own, a short bib record for the item, as well as an item record will need to be created within Reserve Bookroom.

SPECIAL HANDLING NOTE: For Serial Titles, do not attach personal copies of periodical titles to an existing cataloged serial title with copy records attached. Create an issue specific Short Bib record for use on Reserve. Use set input conventions for specific issue title entry. **

Creating a Reserve Title Record

Before you can reserve an item for an instructor, you need to link the title of the item to a course that the instructor teaches. Create a *Short Bib* record for any title that your library does not own (i.e. instructor's personal copies). Horizon creates an *Instructor/Course/Title* (ICT) record.

- 1) Search for the Instructor or Course, then select the instructor (use an * to pull up a list).
- 2) Click *Titles*.
- 3) Highlight the course to which you are adding the title.
- 4) Click *New* to display the *Identify a Title* window.
- 5) Click *Search Pac* to see if there is an existing title record in the catalog.
- 6) If not; Click *Create Short Bib*.
- 7) Enter the fields below using standard input conventions. Title is the only required field.

Author	Enter Last Name, First
Edition	Enter an edition statement. Do not add other notes to this field.
ISBN	Enter the ISBN only
ISSN	Enter the ISSN only
Publication Date	Enter the date of publication
Publisher	Enter the publisher
Title	Enter the title, without initial articles, using standard capitalization, punctuation. Take from the title page of a book. For a periodical issue, input the Title of the magazine, issue number.

- 8) Verify accuracy. *Changes after saving can only be made by reporting the correction to LTS.*
- 9) Click OK, once satisfied with the edits.
- 10) From the *Edit Reserve Title* window, update the following fields:

No. Required	Number of copies to be placed on reserve
Reserve Date	Enter the date that the title is to be placed on Reserve
Withdrawal Date	Enter the date that the title is to be withdrawn from reserve
Reactivation Date	Enter the date when the title is to be placed on Reserve again. Leave blank if not applicable.
Comments	Enter comments about the item (up to 255 characters)
Status	<ul style="list-style-type: none"> • <i>Active</i>: Title on reserve and searchable by title • <i>Inactive</i>: Title not on reserve OR title not searchable
Maximum Needed	Enter the maximum number of copies (items) that you need to place on reserve

- 11) Click Save.

Placing an Item on Reserve

You need to create an item record for non library-owned items to be placed on reserve. When you create an item within the reserve location, Horizon automatically places the item on reserve.

There must be an active Title record for the item you are placing on reserve.

- 1) Create a reserve Title record for the item, if you have not already done so.
- 2) Click *Items* to display the list of items attached to the title record. Make sure that the item has not already been created. You may just need to Activate it and change the withdrawal date to a future date.
- 3) Click *New* to display the *Edit Item Edit for RBR* window. Session defaults will autofill if previously setup for the session.

- 4) Complete or edit the fields.
- 5) Save. The item is now placed on reserve.

Item Barcode	Scan in or enter the item barcode.
Location	Enter the reserve location for your college. Select location with rr suffix from <i>Codes</i> .
Item Type (Use Reserve Itypes ONLY)	Change the itype for the item to reflect the reserve loan period (See <i>Codes</i> with rr prefix).
Collection	Enter the reserve room collection. (Use the standard reserve location for your college: reserve, general, circulation desk, etc.)
Call No.	Enter the reserve call number. (Should be determined by how the materials are shelved while on reserve: instructor's name, course, lc call number, or RESERVE, etc.)
Copy Stmt.	Enter specific volume information. (v. for volume, etc.)
Notes	Enter notes about the reserve item.

On Withdr. (Choose one of the options)	<ul style="list-style-type: none"> • <i>None</i> - Keeps both title & item in reserve upon withdrawal. Mark this option for all library-owned material to be returned to the Main location. • <i>Discard Item</i> - Deletes item from reserve & Horizon. Do not use if you plan to move the item back to the Main Location for circulation. • <i>Discard item & bib</i> - Deletes item and title record from reserve & Horizon. Do not use if you plan to move the item back to the Main Location for circulation. • <i>Archive Item</i> - Use only for non-library owned materials that are to be used in reserve in the future. Do not use for library owned materials. Archiving items removes the item record and stores it in reserve bookroom. • <i>Archive Item & Bib</i> - If more than one item is linked to the title, you cannot archive the title. Do not use for library owned materials. Archiving such items removes the item record and stores it in Reserve bookroom. To restore, unarchive the item.
Withdr Instr	Select from <i>Codes</i> .
Check In Note	Enter a check in note for staff, that displays at check in.
Call Type	Enter the call number type if different from the Collection call type. See the Collection code table for call types.

Editing Reserve Information for a Title

Reserve information for a title may be edited after the title is linked to an instructor, or an item is placed on reserve. This may be done at any time a change is needed.

- 1) Search for the Instructor linked to the title to be edited,
OR, search for a course and select the instructor linked to the title you wish to edit.
- 2) Click the *Titles* button.
- 3) Highlight the course linked to the title to be edited.
- 4) Highlight the title desired from the titles list.
- 5) Click *Edit*. Complete or update the fields/options.
- 6) Click *Save*.

Changing Reserve Item Records

Edit item records at the same time you place them on reserve, or anytime thereafter. This is especially important as you will need to change the itype in order to change the loan period for items pulled from the general collection for reserve. (*Use special reserve room itypes based on loan periods, See Itype Codes in Appendix*). You can also assign an owner to an item (an owner is any individual, department or institution that owns an item).

EDITING THE ITEM RECORD WHILE PLACING AN ITEM ON RESERVE

- 1) From the Reserve Bookroom folder on the Navigation bar, select Reserve/Place Items on Reserve.
- 2) Enter the barcode number.
- 3) Click *Edit Item*, at the Place Items on Reserve window.
- 4) Complete or update fields in the *Edit: Place Items On Reserve* window.
- 5) Click *Save* when completed.

EDITING ITEM RECORDS AFTER PLACING AN ITEM ON RESERVE

- 1) Search for the instructor or course linked to the titles to be changed.
- 2) Highlight the desired course or instructor linked to the title.
- 3) Highlight the title.
- 4) Click *Edit*.
- 5) From the *Edit Reserve Title* window, click *Items*.
- 6) From the copies/items listed for the title, highlight the item at your location that you wish to edit. (Make sure the item selected is one on reserve for your library, otherwise you may edit an item that belongs to another location).
- 7) Click *Edit*.
- 8) Update the fields as desired.
- 9) When completed, click *Save*.

Assigning an Owner to a Reserve Item

An owner is any individual, department or institution that owns an item. You can select an owner from a list of instructors, or you may create a new one. The owner may be different than the instructor who wants to reserve the item, or the item belongs to an individual faculty member, but is on reserve for the whole department as a generic instructor. An owner also may indicate further withdrawal instructions that are placed in the assigned owner information in the item record.

- 1) Search for the instructor or course linked to the title.
- 2) Highlight the course or instructor.
- 3) Highlight the title.
- 4) Click *Edit*.
- 5) Click *Items* to list all of the copy/items for the title.
- 6) Highlight the item to which an owner is to be assigned.
- 7) Click *Edit*.
- 8) Click *Owner* to display the *List Reserve Instructor* window.
- 9) Do one of the following:

<i>Choose an Instructor from the List</i>	<i>Create a New Owner</i>
<ul style="list-style-type: none">• Highlight the Instructor.	<ul style="list-style-type: none">• Click <i>New</i>.
<ul style="list-style-type: none">• Click <i>Found</i>.	<ul style="list-style-type: none">• Complete the fields.
<ul style="list-style-type: none">• Edit.	<ul style="list-style-type: none">• Save.
<ul style="list-style-type: none">• Save.	<ul style="list-style-type: none">• Click <i>Found</i>.
	<ul style="list-style-type: none">• Save.

Using a Pick List Report

Utilized for generating and printing a report of items flagged for reserve. You select the location for which you wish to generate the *Pick List*.

Three Types of Pick Lists:

- *Prepare and Show*. Generates a list of items that are checked in to another location and that you need to retrieve and place on reserve. Horizon flags each item for reserve and changes the item status to “**rb**”
- *Show*. Generates a list of items from a previous Pick List, that have not yet been placed on reserve.
- *Cumulative*. Generates a list of items with a reserve bookroom “**rb**” status at another location.

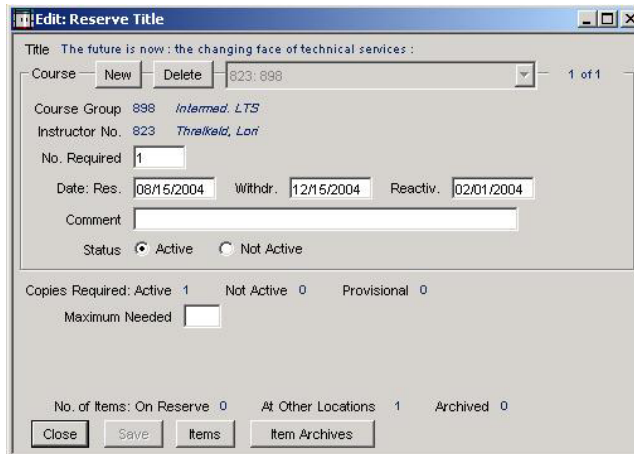
CREATING A PICK LIST

- 1) Under the Reserve Bookroom folder on the navigation bar, double-click the Reports folder.
- 2) Select the Pick List type desired. Depending on the List type chosen, select or enter criteria. The list displays.
If you want to print the list, choose File/Print or click the Print icon on the toolbar.
- 3) If you wish to place an item on reserve, highlight the item and click the *Place on Reserve* button. The status changes from “**rb**” to “**i**” (checked in at the reserve location).
- 4) Horizon changes the item status and places the item on reserve.
- 5) Close the Pick List window.

Unlinking a Reserve Title

A title may be unlinked from an instructor or a course without deleting it from the Reserve Bookroom.

- 1) Search for either the instructor or course.
- 2) Click Titles. The *Titles for...* window opens.
- 3) Highlight the instructor or course associated with the title you are unlinking.
- 4) From the titles list, select the title to be unlinked and click the *Edit* button.



- 5) If there are multiple courses associated with the title, in the Course Group area click on the down arrow to select the correct course.
- 6) Click the *Delete* button.
- 7) Click *Save*.

Removing an Instructor from a Course

An instructor may be removed from a course without deleting the Instructor record from Reserve.

- 1) Search for the course.
- 2) Click *Titles*. The *Titles for {Course}* window opens.
- 3) Highlight the instructor whom you wish to unlink from the course.
- 4) If there are any titles attached to the instructor, unlink each title. (See *Unlinking a Reserve Title*).
- 5) Once there are no titles for that instructor attached to the course, the instructor is automatically removed from the course.

Removing a Course from an Instructor

A course may be removed from an instructor, without deleting the Course record from Reserve.

- 1) Search for the instructor.
- 2) Click *Titles*. The *Titles for {Instructor}* window opens.
- 3) Highlight the course that you wish to unlink from the instructor.
- 4) If there are any titles attached to the course, unlink each title. (See *Unlinking a Reserve Title*).
- 5) Once there are no titles for that course attached to the instructor, the course is automatically removed from the instructor.

Withdrawing Items from Reserve

When you withdraw a library owned item, you may return it to its owning location. If you are withdrawing a non-library owned item, you may return it to its owner. If a reserve item is checked out when it comes time to withdraw it, you can flag the item for withdrawal. When the item is checked in, Horizon prompts staff to withdraw the item (or whatever other withdrawal instructions are given).

NOTE: When you withdraw an item from reserve, you should *inactivate* the reserve Title record; otherwise, users will still be able to search for the title.

Upon withdrawal from reserve, the reserve Title and item records can be archived if likely to wind up on reserve sometime in the future. New instructor, course and title records do not need to be recreated once archived for future use.

- 1) From the Reserve Bookroom folder on the Navigation bar, double-click on the Reserve folder and double-click on Withdraw Items from Reserve.
- 2) Enter the barcode number. Click OK at the Withdrawal Processing pop-up window.



- 3) If you wish to check the withdrawal and verify that the item has returned to its permanent location/collection/etc., click on the Edit Item button.

NOTE:

- 4) Items not returning to a permanent library location receive a different pop-up message and the item and/or bib is deleted or archived.



Printing Instructor Letters

Letters can be sent to instructors to notify them when you plan to withdraw their items from reserve. Instructions or explanations can be added to the letter.

***** A withdrawal date must be specified for the title in order to print the instructor letter. Also, you cannot view the letter before you print it.**

- 1) Verify that a Withdrawal date is entered for the titles for which you are printing a withdraw letter.

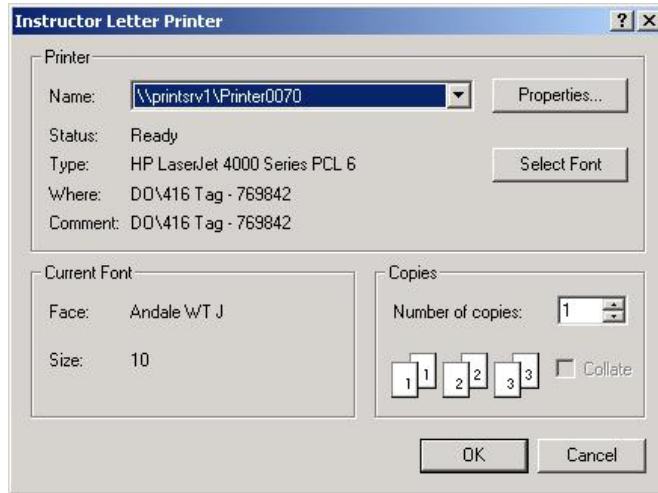
The screenshot shows a dialog box titled "Edit: Reserve Title". It contains the following information:
Title: Cataloging and classification for library technicians /
Course: [New] [Delete] 1217:1188 (1 of 1)
Course Group: 1188
Instructor No.: 1217 Threlkeld, Lori D.
No. Required: 2
Date: Res. 03/10/2005 Withdr. 05/31/2005 Reactiv. 09/01/2005
Comment: [Empty text box]
Status: Active Not Active

- 2) From the Reserve Bookroom folder on the Navigation bar, double-click on the Reports folder.
- 3) Double-click on Withdrawal: Instructor Letter. Enter a Withdrawal Date or click the Date Range button to enter a range of dates. Click OK.

The screenshot shows a dialog box titled "Instructor Letters". It contains the following information:
Select a withdrawal date or Date Range to print
Instructor Letters
Withdrawal Date: 03/10/2005
Buttons: OK, Cancel, Date Range

The screenshot shows a dialog box titled "Date Range". It contains the following information:
Radio buttons: Prior to Since Range
Start Date: [Empty text box]
End Date: [Empty text box]
Buttons: OK, Cancel

- 4) The Print window opens (remember: you cannot view the letter(s) before you print).



5) Click OK to print the letter(s).

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<p>Hamburg, Walter Music Administration Building 1213 Main Street Weed, California 97970</p> <p>The following titles are scheduled to be removed from reserve at the end of this term. Please notify the library if any of these titles should remain in the reserve location. Thank you.</p>		
Title	Course	Copies
Capricorn concerto; Essay no. 1 for orchestra/	Music of the 20th Century	1

Appendix

RESERVE LOCATION CODES

(rr suffix added to college location)

cgcrr	Chandler_Gilbert CC Reserve Room
emcrr	Estrella Mountain CC Reserve Room
gccrr	Glendale CC Reserve Room
gwcrr	GateWay CC Reserve Room
mccrr	Mesa CC Reserve Room
mrmrr	Mesa Red Mountain CC Reserve Room
pcrr	Phoenix College Reserve Room
pvcrr	Paradise Valley Reserve Room
scrr	Scottsdale CC Reserve Room
smcrr	South Mountain Reserve Room

RESERVE ITYPE CODES

(Based on loan period: hourly, daily, weekly, semester basis; rr prefix)

Itype Codes	Description
rr120dy	Reserve Room 120 days
rr150dy	Reserve Room 150 days
rr1dy	Reserve Room 1 day
rr1hr	Reserve Room 1 hour
rr1wk	Reserve Room 1 week
rr21dy	Reserve Room 21 days
rr24hr	Reserve Room 24 hours
rr2dy	Reserve Room 2 days
rr2hr	Reserve Room 2 hours
rr2wk	Reserve Room 2 weeks
rr3dy	Reserve Room 3 days
rr3hr	Reserve Room 3 hours
rr3wk	Reserve Room 3 weeks
rr48hr	Reserve Room 48 hours
rr4hr	Reserve Room 4 hours
rr7dy	Reserve Room 7 days

RESERVE ITEM STATUSES

Status	Location	Explanation
Reserve Bookroom (rb)	Owning (Normal location)	Flagged for reserve, but not yet available for circulation in Reserve Bookroom. Items with this status show on the PickList.
Reserve Bookroom (rb)	Reserve	Checked in to reserve location and flagged for withdrawal
Checked In (i)	Owning (Normal location)	Checked in at the Main location. Retrieve item to place on reserve.
Checkin In (i)	Reserve	Item has been placed on Reserve and is available for Check-out
Reserve Withdrawal (rw)	Reserve	Flagged for withdrawal from reserve. After the item is returned, withdraw it from reserve and return to the collection or to the owner. Items with rw status show up on the PickList to be withdrawn.