

Advanced Bookings

Circulation

How helpful was this page?



Unknown macro: 'rate'

Tell us what we can improve.

Related Blog Posts

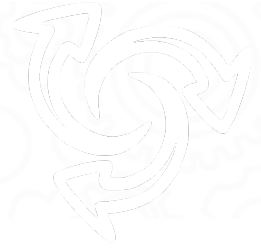
Blog Posts

- Blog: [Librarian hack: schedule your overdue notices](#) created by [Bethany Brown](#)
Sep 13, 2023
[Alexandria](#)
- Blog: [Circulation: Items out tab](#) created by [Bethany Brown](#)
Mar 21, 2023
[Alexandria](#)
- Blog: [Circulation: homeroom tab](#) created by [Bethany Brown](#)
Mar 15, 2023
[Alexandria](#)
- Blog: [Circulation: command line](#) created by [Bethany Brown](#)
Mar 08, 2023
[Alexandria](#)
- Blog: [Overdue items notices—"Yes, I am sending them"](#) created by [Bethany Brown](#)
Jan 25, 2023
[Alexandria](#)
- Blog: [Transaction Scripts—Not just for inventory](#) created by [Bethany Brown](#)
Nov 26, 2022
[Alexandria](#)
- Blog: [Keep track of items on display](#) created by [Bethany Brown](#)
Nov 02, 2022
[Alexandria](#)
- Blog: [Shortcut to vendors](#) created by [Bethany Brown](#)
Oct 13, 2022
[Alexandria](#)
- Blog: [Cash drawer report to the rescue!](#) created by [Bethany Brown](#)
Oct 04, 2022
[Alexandria](#)
- Blog: [When does an overdue item become lost?](#) created by [Bethany Brown](#)
Mar 15, 2022
[Alexandria](#)

[Save as PDF](#)

Advanced Bookings

Last Updated: \$action.dateFormatter.formatDateTime(\$content.getLastModificationDate())



Options



This page has been moved over to <https://support.goalexandria.com/circulation/advanced-bookings/>.

Advanced Bookings Options



Circulation > Actions menu > Advanced Bookings



Advanced Bookings is an optional Alexandria integration. [Contact our Sales Team](#) if you're interested in adding it to your library!

If you recently added Advanced Bookings to your existing user license, you must re-register your software before it will become available.

Every day that reservations begin, an operator will select **Advanced Bookings** from the **Circulation** window's main **Actions** (gear/cog) menu.

This will open the Advanced Bookings window, which allows you to process reservations that begin on or between two selected dates. In order for Alexandria to know that items have been returned, all returned items must be checked in before they are put away. Use Alexandria's Bookdrop function to return items.

Check the desired boxes and click the **Process** button to begin. Once the process has been completed, reports can be examined, saved, and/or printed. If you're unsure about which reports you need, prepare them all until you find one that works best for you.


See the [Advanced Bookings Preferences](#) to make changes to various settings and notices.

 Actions

Cash Drawer Balance

Advanced Bookings

Process Pending Bookings



Advanced bookings

Only reservations that begin within the reservation range will be processed.

Reservation range -

Sort Picking Lists by

☒ Call number

☐ Patron Homeroom

☐ Patron 2nd Location

☐ Patron site

Sort Standard Reservation Lists by

☐ Call number

☐ Patron name

☒ Patron Homeroom

☒ Patron 2nd Location

☒ Patron site

Format options

CANCEL
PROCESS



Reports are prepared based on reservation requests. Once an item has been checked out to a patron, it will *not* appear in these reports.

Options

Sort Picking Lists by

- **Call Number.** This option prepares a list of reservations in call number order. Use this list to quickly retrieve items from your collection.
- **Patron Homeroom / Call Number.** This option prepares a list of reservations by patron location, call number order, and then by patron. This report is useful for large operations where more than one person may be filling orders. It also helps with sorting reservations for delivery.
- **Patron 2nd Location / Call Number.** This option prepares a list of reservations by patron sub-location, call number order, and then by patron. This report is useful for large operations where more than one person may be filling orders. It also helps with sorting reservations for delivery.
- **Patron Site / Call Number.** This option prepares a list of reservations by patron site, call number order, and then by patron. This report is useful for large operations where more than one person may be filling orders. It also helps with sorting reservations for delivery.

Sort Packing Lists by

- **Patron Name**
 - If customers often place reservations on several items, then packing lists help make sure that each patron receives their requested items.
 - The packing list also contains a Packing List Note, which can be configured in [Advanced Bookings Preferences](#).
- **Patron Homeroom**
 - Each location begins on a new page and is then further sorted by patron.
 - Central sites can then collect items for shipping to common locations.
- **Patron 2nd Location**
 - Each location begins on a new page and is then further sorted by patron.
 - Central sites can then collect items for shipping to common locations.
- **Patron Site**
 - Each location begins on a new page and is then further sorted by patron.
 - Central sites can then collect items for shipping to common locations.

Sort Standard Reservation Lists by

- **Call Number**
- **Name**
- **Homerroom**
- **2nd Location**
- **School**

Sort Standard Reservation Labels by

- **Name**
- **Homerroom**
- **2nd Location**
- **School**

Format Options

- **Page Break Between Sorts**
 - Check this box if you would like to have a full page break between each chosen sort option.

Booking Labels

- **Prepare Booking Labels**
 - Booking labels are prepared in this three-across format: *Address Label – Item Info – Patron Info*
 - Booking labels are used to address items for delivery to requesting patrons. Each row of labels contains unique information.
 - The first label contains delivery information (e.g. patron, location, and address).
 - The second label contains item information, call number, barcode number, barcode image, reservation begin/end dates.
 - The third label contains patron information, name, location, barcode number, barcode image, item barcode number, item reservation begin/end dates.
 - Standard Alexandria labels are supported to reduce confusion and cost.

Check Out Options

- **Automatically Check Out Items to Requesting Patrons.** When selected, Alexandria automatically checks out each available reservation to the appropriate patron.
 - Once a reservation has been checked out, it's no longer a reservation; it becomes loaned. Alexandria doesn't differentiate between items that have been loaned via reservation, walk in, satisfied hold, or any other way that an item can be borrowed.
 - If Alexandria checks out a copy reservation that should be in inventory but can't be located (overdue, for instance), then an alternative copy will be used if one is available. If no other copies can be located, then a warning window will appear and a note will be made in the transaction log.
 - If these exceptions happen frequently, another way to process reservations is to print out all reports, and once items are physically allocated to a patron, check them out using Alexandria's standard circulation commands.
- **Substitute Copies.** If Automatically Check Out Items to Requesting Patrons is checked and the copy with the reservation is not available, then Alexandria may try to find a substitute copy to fill the reservation. If Never is selected, then no substitution attempt will be made. If Local Copies is selected, then only copies that are available at that particular library may be used. If Any Copies is selected, then copies at all other libraries may be used, however, local copies will be given priority.

Scheduling Reservation Reports

Comparable reports—[Reservation Labels](#), [Reservation Packing List](#), [Reservation Picking List](#), and [Reservations List](#)—can all be run in [Reports](#).

Through Reports, they can be set to run automatically on a schedule.

[Back to Top](#)

Advanced Bookings Options



Advanced Bookings is an optional Alexandria integration. [Contact our Sales Team](#) if you're interested in adding it to your library!

If you recently added Advanced Bookings to your existing user license, you must re-register your software before it will become available.

Every day that reservations begin, an operator will select **Advanced Bookings** from the [Circulation](#) window's main **Actions** (gear/cog) menu (as shown below).

This will open the Advanced Bookings window, which allows you to process reservations that begin on or between two selected dates. In order for Alexandria to know that items have been returned, all returned items must be checked in before they are put away. Use Alexandria's Bookdrop function to return items.

Check the desired boxes and click the **Process** button to begin. Once the process has been completed, reports can be examined, saved, and/or printed. If you're unsure about which reports you need, prepare them all until you find one that works best for you.

See the [Advanced Bookings Preferences](#) to make changes to various settings and notices.

? Unknown Attachment

? Unknown Attachment



Reports are prepared based on reservation requests. Once an item has been checked out to a patron, it will *not* appear in these reports.

Options

Sort Picking Lists by

- **Call Number.** This option prepares a list of reservations in call number order. Use this list to quickly retrieve items from your collection.
- **Patron Homeroom / Call Number.** This option prepares a list of reservations by patron location, call number order, and then by patron. This report is useful for large operations where more than one person may be filling orders. It also helps with sorting reservations for delivery.
- **Patron 2nd Location / Call Number.** This option prepares a list of reservations by patron sub-location, call number order, and then by patron. This report is useful for large operations where more than one person may be filling orders. It also helps with sorting reservations for delivery.
- **Patron Site / Call Number.** This option prepares a list of reservations by patron site, call number order, and then by patron. This report is useful for large operations where more than one person may be filling orders. It also helps with sorting reservations for delivery.

Sort Packing Lists by

- **Patron Name**
 - If customers often place reservations on several items, then packing lists help make sure that each patron receives their requested items.
 - The packing list also contains a Packing List Note, which can be configured in [Advanced Bookings Preferences](#).
- **Patron Homeroom**
 - Each location begins on a new page and is then further sorted by patron.
 - Central sites can then collect items for shipping to common locations.
- **Patron 2nd Location**
 - Each location begins on a new page and is then further sorted by patron.
 - Central sites can then collect items for shipping to common locations.
- **Patron Site**
 - Each location begins on a new page and is then further sorted by patron.
 - Central sites can then collect items for shipping to common locations.

Sort Standard Reservation Lists by

- **Call Number**
- **Name**
- **Homeroom**
- **2nd Location**
- **School**

Sort Standard Reservation Labels by

- **Name**
- **Homeroom**
- **2nd Location**
- **School**

Format Options

- **Page Break Between Sorts**
 - Check this box if you would like to have a full page break between each chosen sort option.

Booking Labels

- **Prepare Booking Labels**

- Booking labels are prepared in this three-across format: *Address Label – Item Info – Patron Info*
- Booking labels are used to address items for delivery to requesting patrons. Each row of labels contains unique information.
 - The first label contains delivery information (e.g. patron, location, and address).
 - The second label contains item information, call number, barcode number, barcode image, reservation begin/end dates.
 - The third label contains patron information, name, location, barcode number, barcode image, item barcode number, item reservation begin/end dates.
- Standard Alexandria labels are supported to reduce confusion and cost.

Check Out Options

- **Automatically Check Out Items to Requesting Patrons.** When selected, Alexandria automatically checks out each available reservation to the appropriate patron.
 - Once a reservation has been checked out, it's no longer a reservation; it becomes loaned. Alexandria doesn't differentiate between items that have been loaned via reservation, walk in, satisfied hold, or any other way that an item can be borrowed.
 - If Alexandria checks out a copy reservation that should be in inventory but can't be located (overdue, for instance), then an alternative copy will be used if one is available. If no other copies can be located, then a warning window will appear and a note will be made in the transaction log.
 - If these exceptions happen frequently, another way to process reservations is to print out all reports, and once items are physically allocated to a patron, check them out using Alexandria's standard circulation commands.
- **Substitute Copies.** If Automatically Check Out Items to Requesting Patrons is checked and the copy with the reservation is not available, then Alexandria may try to find a substitute copy to fill the reservation. If Never is selected, then no substitution attempt will be made. If Local Copies is selected, then only copies that are available at that particular library may be used. If Any Copies is selected, then copies at all other libraries may be used, however, local copies will be given priority.

Scheduling Reservation Reports

Comparable reports—[Reservation Labels](#), [Reservation Packing List](#), [Reservation Picking List](#), and [Reservations List](#)—can all be run in [Reports](#).


Through Reports, they can be set to run automatically on a schedule.

Process Pending Bookings

Process Pending Bookings

As with any automated process, things can always go wrong. The following section addresses these exceptions:

- If the item is not available at the time of processing or the system shows the requested copy is not available for reservation, the previous patron may not have returned it. Or perhaps it was returned, but not checked in. Regardless, Alexandria doesn't know anything other than the item is not available.
- Alexandria will indicate all unavailable items when your list is prepared. When you run the **Process Pending Bookings** command, Alexandria checks to see if any of the unavailable items have recently become available. If they have, they'll be automatically assigned to the requesting patron.



Process Pending Bookings

Processes any pending reservations to be filled if copies with reservations become available. If you select a substitute option, then different copies will be checked out if any are available.

☐ Use Reports Selected in Advanced Bookings Dialog
 ☒ Any copy from any site

Substitute Copies

Any Copies

CANCEL

PROCESS

- If an item doesn't become available and no alternatives are located, there is nothing Alexandria can do but wait. The reservation will remain pending until its end date; after which, it's removed by the system.
- Another problem occurs when an item is not physically located at the time of reservation. Alexandria thinks the item is available, but it's not. This will only be discovered when someone tries to locate the physical item for the requesting patron. The item could be incorrectly shelved, lost, or borrowed without having been checked out (i.e. stolen). In any case, the item should be checked in so that the requesting patron isn't responsible for returning something they never received; then the item should be declared Lost so that other patrons will not place reservations on it. Hopefully, an alternative selection can be located for the patron.

Process Pending Bookings

As with any automated process, things can always go wrong. The following section addresses these exceptions:

- If the item is not available at the time of processing or the system shows the requested copy is not available for reservation, the previous patron may not have returned it. Or perhaps it was returned, but not checked in. Regardless, Alexandria doesn't know anything other than the item is not available.

- Alexandria will indicate all unavailable items when your list is prepared. When you run the **Process Pending Bookings** command, Alexandria checks to see if any of the unavailable items have recently become available. If they have, they'll be automatically assigned to the requesting patron.
- If an item doesn't become available and no alternatives are located, there is nothing Alexandria can do but wait. The reservation will remain pending until its end date; after which, it's removed by the system.
- Another problem occurs when an item is not physically located at the time of reservation. Alexandria thinks the item is available, but it's not. This will only be discovered when someone tries to locate the physical item for the requesting patron. The item could be incorrectly shelved, lost, or borrowed without having been checked out (i.e. stolen). In any case, the item should be checked in so that the requesting patron isn't responsible for returning something they never received; then the item should be declared Lost so that other patrons will not place reservations on it. Hopefully, an alternative selection can be located for the patron.

Preferences

[Advanced Bookings Preferences](#)