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## Overview of Voyager Course Reserve Workflow

- **Product:** Voyager
  - **Product Version:** 7.2 and greater
  - **Relevant for Installation Type:** All
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## Question

Overview of Voyager Course Reserve workflow.

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## Introduction

Library staff place library-owned items, instructors' personal materials, photocopies, electronic items, and other types of material on reserve. Library staff primarily use the Voyager Circulation client to place materials on and remove materials from reserve, as well as to manage reserve lists. The Cataloging client may also be used for adding or deleting materials from your library's database.

The purpose of the following is to provide basic steps for putting an item on reserve. It is not a substitute for reading the [Circulation User's Guide](#) (Chapter 8).

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## Considerations for Electronic Reserves

Voyager provides the means to link to URLs and provide user access to those web addresses from the reserve lists in the OPAC. The actual reserve files reside outside Voyager on a server of your choice (check with campus IT to be sure there is

adequate space), or as part of an electronic resources package subscribed to by your library (with appropriate licensing permissions for reserve use). The bib/MFHD records representing these files can be saved in your Voyager database, if you prepare them using the cataloging client, load them via batch load, or add them as an E-Item through the reserves process.

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## System Administration Considerations

It is not necessary, but libraries may set up a separate circulation policy group and/or happening location for reserves. Doing this would separate your library's reserves workflow from other circulation activity for more granular reporting statistics. However, if a library uses the same workstation for both regular charges and reserves charges, one policy group/happening location may work better.

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## Workflow

**These four parts must be completed to successfully put an item on reserve:**

- Part 1: Create the list, using the reserve functions in the Circulation client.
- Part 2: Link the list to a department, instructor, course, and/or to a section to enable OPAC display of the reserve lists.
- Part 3: Add reserve items to the list.
- Part 4: Turn items "On Reserve" so they will show up correctly in the OPAC and Voyager will track usage of print items while on reserve.

Many of the setup options/setup steps for reserves can be accessed by right-clicking in the appropriate area on the Reserve List screen in Voyager Circulation. Additionally, the options can also be found in the Reserve drop-down menu, in the Voyager Circulation menu bar.

### Create the List

The "Reserve List Search" box offers several options for retrieving existing reserve lists. The Reserve List Search box opens when you click the Reserve icon, or select "Reserve" from the Function menu.

Canceling the search box to open a blank reserves list is the first step in creating a new reserve list.

1. Open a blank reserve list.
  1. Click the "Reserve" icon.
  2. Click "Cancel" on the Reserve List Search box.
  3. Place cursor in the Reserve List Header area and right click.
  4. From drop-down menu that displays, select and left click on "Create New List."
  5. The "Create New Reserve List" box displays. Enter the settings below.
2. Enter the "List Name."
  - To make managing your reserve lists as simple as possible and finding reserve lists easier for patrons, be consistent in your naming patterns.
    - Think about what you will need and use the same naming pattern for every list.
    - It may help to think of these lists and name them for specific courses or instructors, e.g. MUS 101 or MUS-Smith.
    - Using abbreviations from course offering catalogs is a way to ensure naming *consistency*.

3. Enter the "Effective" dates.
  - Effective dates must be set for each list. These dates determine the time frame for displaying lists in the OPAC dropdowns.
    - You may create lists for the future by setting the beginning effective date for a future time.
    - List life can be as long as you choose, but remember copyright constraints may apply and should be respected in determining list life.
    - When the ending date is reached, the list will no longer display in the OPAC dropdowns, but expired lists will continue to exist in the Circulation client until you delete them.
  - 1. Click on the left effective date ellipses button to set starting date. You can use the pop-up calendar to select the date.
  - 2. Click on the right effective date ellipses button to set ending date. You can use the pop-up calendar to select the date.
4. Enter a default temporary location for the list.
  1. Click the drop-down menu arrow for "Reserve Location."
  2. From the drop-down menu, select the desired default temporary location.
    - This temporary location will be applied to the reserve items when they are turned "On" for reserve in Part 4. It will be visible both in the OPAC and in the Voyager clients.
    - Individual items on the list may be assigned different temporary locations than this default. See Part 4 for steps.
5. Enter a default temporary item type for the list.
  1. Click the drop-down arrow for "Reserve Item Type."
  2. From the drop-down menu, select the default temporary item type.
    - This temporary item type will be applied to the reserve items when they are turned "On" for reserve in Part 4. It will be visible both in the OPAC and in the Voyager clients.
    - Individual items on the list may be assigned different temporary item types than this default. See Part 4 for steps.

### **Link the List to a Department, Instructor, and/or Course**

You must link a reserve list to one or more Department, Instructor, and/or Course linking categories

You *must* link the List to a Course for patrons to be able to access the reserve list in the WebVoyage OPAC via any of the aforementioned linking categories.

1. Right click in the "Linked Courses" area.
2. Select "Link Courses" from the pop-up menu.
3. Choose entries from the drop-down menus for the Department, Instructor, Course, and Section as desired for the reserve list.
4. After information is selected, choose the "Link" button. You will receive confirmation that the course was linked.

If the Department, Instructor and/or Course you wish to link your reserve list to is not in the drop-down, you can create it using the blue "+" symbol.

See the [Circulation User's Guide](#) for further instructions.

## Add Items to the List

There are six methods for adding items to a List. See the [Circulation User's Guide](#) for further instructions.

### Method 1: Adding Items by Barcode from Your Library's Catalog:

- **Recommendation:** We strongly suggest that you have items from your collection that are to be placed on reserve in hand before starting the process.

### Method 2: Adding Items by Keyword or Title from Your Library's Catalog:

- **Recommendation:** We strongly suggest that you have items from your collection that are to be placed on reserve in hand before starting the process.

### Method 3: Adding E-Items by E-Item ID from Your Library's Catalog:

- **Recommendation:** If you do not know the E-Item ID number for the E-Item you wish to add, you can locate it through a Voyager Access Report. E-Items cannot be looked up individually in either the Circulation or the Cataloging clients.

### Method 4: Adding Items Not In Your Library's Catalog: (First Copy/Volume) On-The-Fly In the Circulation Module

### Method 5: Adding Items Not In Your Library's Catalog: (Additional Copies/Volumes of physical items) On-The-Fly In the Circulation Module

### Method 6: Adding Items Not in Your Library's Catalog: Using Templates in the Catalog Client (requires authorization to use the Catalog Client)

- Catalogers can create templates for diverse reserve materials (photocopies, headphones, disk drives, etc) for Reserve staff to use in processing these items. The templates are saved on reserve workstations for later access.

## Turn Items "On Reserve"

1. Have completed above sections.
  2. Highlight the listed items either individually, or in groups.
    - Hold the Ctrl key while clicking to select multiple specific individual items, or the Shift key to select a range of items from the list.
  3. Right click on the selected list and choose "On Reserve" from the pop-up menu.
- Since items on a list can be in active or inactive mode, it is necessary to switch each item to "on" or "off" reserve as described above to toggle between the modes.
    - Items "on reserve" will appear in the OPAC with a "temporarily shelved at [reserve location]" label.
    - Items "on reserve" will track a reserve circulation count that is displayed in parenthesis on the bib record following "yes" in the "On Reserve" column. To reset circulation counter, turn items "off" and them back "on" reserve.
  - If an item is listed in more than one reserve list, if you toggle the item ON or OFF for one reserve list, it will be adjusted to the same status in all of the lists it is on.
    - This is because Voyager stores the information about whether an item is ON or OFF reserve as a Yes/No value in the item record itself.

## Update Default Item Type or Location (Optional)

Optional: When you turn an item "On Reserve", Voyager applies the default item type and default temporary shelving location set in the Reserve List Header. You can change the location and/or item type for any item in the reserve list that is different than the list default.

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