Generic NCIP Testing

Last updated: Wed, 12 Feb 2020 16:45:14 GMT

Find information about testing Lookup User, CheckOut, AcceptItem, and CheckIn.

**Lookup User**

**GOAL**
Confirm patrons can log in and request material with NCIP enabled.

**NEEDED TO TEST**
Test or real patron barcodes and pins/surnames from your library system.

If patron profiling is enabled, test using patron records with the patron types allowed to place requests as well as those that cannot.

**HOW TO TEST**
- Log into your patron web access pages using the patron barcodes and their pins/surnames. If successful, the patron will be brought to the selected page and at the top of the page it should read Welcome ... ‘patron’s name’ (e.g. Welcome, TEST PATRON. CLICK HERE TO LOGOUT)
- If patron profiling is enabled, place a book and/or article request to ensure that these can or cannot be done as configured.

**TROUBLESHOOTING**

---

**Checkout**

**GOAL**
Have Relais check out material in your local library
### system to a generic patron as part of ‘processing’ a loan request.

#### NEEDED TO TEST

- 2 or 3 test REG requests that are in the S/U Internal queue awaiting processing.
- Barcodes of ‘checked in’ material in your library system that can be used to ‘process’ the loan requests.

#### HOW TO TEST

- Through Request Processing call up one of the test REG requests.
- Enter the barcode of one of the ‘checked in’ items as the local number for the request.
- Once processing is complete in Relais, check your library system to ensure the item is checked out to the generic patron and has the correct loan period assigned.

#### TROUBLESHOOTING

---

### AcceptItem

#### GOAL

Have Relais create a brief bib and item record and place a hold on the material in your local system as part of ‘processing’ a loan request for your own patron.

#### NEEDED TO TEST

- 2 or 3 test PAT- requests that are in the S/U External queue awaiting processing.
- Temporary item barcodes that can be assigned when processing the loan request. If your library system permits, you can also use the request number as the local number assigned when processing the loan request.
HOW TO TEST

- Through Request Processing call up one of the test PAT requests.
- Enter one of the temporary barcodes as the local number for the request.
- Once processing is complete in Relais, check your library system to ensure that a brief bib and item was created for the title/author/barcode entered and that the patron has a hold request against the item.
- Check in the item in your library system to activate the hold for the patron.
- Check out the item to the patron in your library system. Ensure the correct loan period is assigned.

TROUBLESHOOTING

Checkin

GOAL

Have Relais check in the material in your local library system as part of 'Loan Tracking'.

NEEDED TO TEST

The test PAT and REG requests used in testing that have been loaned and can be returned.

HOW TO TEST

- Through Loan Tracking, call up one of the test requests.
- Mark the item as Returned and update the request.
- Once processing is complete in Relais and Relais has indicated that the item was checked in successful, check your library system to ensure that the items have been checked in.