Loan an item

Learn how to loan an item to your patrons or another library and how to configure the Loan and Ship Loan tab in Relais ILL.

See also:

- Loan an item (using Windows Login)
- Query results for details regarding the constant request information, standard buttons and request history.

Loan to your own patron or another library

To update a request as a loan (either to your own patron or to another library):

1. Retrieve the request to be updated. The Loan tab displays.

2. Enter / update all the fields as described below and click Loan or Enter.

3. The request is updated in Relais as a Loan (LON) and a series of updates is done.
   - In the default RequestFlow the request is moved to the delivery process (Local Print) for coverpages to print.

https://help.oclc.org/Resource_Sharing/Relais_ILL/Loan_items_and_manage_loans/Loan_an_item

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- If the Delivery Method = Pickup and if there is an email address for the requester, a Pickup Notice may be sent (depending on your configuration).
  - An audit record is added to the request.
  - For an ISO transaction:
    - If the request is from another library a Shipped message is generated.
    - If the request is from your patron a Received message is generated.
  - A loan tracking record is created in Relais.
    - If the request is from another library this record tracks the loan to the library.
    - If the request is from a patron, this record tracks the loan to the patron.

### Request update fields - Table

<table>
<thead>
<tr>
<th>FIELD</th>
<th>DESCRIPTION</th>
<th>NCIP NOTES</th>
</tr>
</thead>
<tbody>
<tr>
<td>Barcode (formerly known as Local Number)</td>
<td>Mandatory. Key or wand in the barcode number for the item being loaned.</td>
<td>When loaning a book to another library this barcode is included in the <a href="https://help.oclc.org/Resource_Sharing/Relais_ILL/Loan_items_and_manage_loans/Loan_an_item">CheckoutItem message</a> sent to the local library system.</td>
</tr>
<tr>
<td></td>
<td>Once the loan tracking record is created in Relais, the request can be retrieved using this barcode.</td>
<td>When loaning a book to a patron, this barcode is included in the <a href="https://help.oclc.org/Resource_Sharing/Relais_ILL/Loan_items_and_manage_loans/Loan_an_item">AcceptItem message</a> sent to the local library system. Be sure to enter a barcode or number that the local library system is able to use when creating the temporary bib and item record.</td>
</tr>
<tr>
<td>Due Date</td>
<td>The default due date is displayed. This date is based on the loan code for the patron or library record.</td>
<td>Typically if you are using NCIP, hide the due date in the tab.</td>
</tr>
<tr>
<td></td>
<td>You can modify this date as required. For example when loaning a document to a patron, the due date can be set based on the due date set by the supplying library.</td>
<td>For most library systems the due date provided in the CheckoutItem and AcceptItem message is ignored, the due date is set by the library system. The one exception to this is Alma which is able to accept and use the due date from Relais if that is your preference.</td>
</tr>
<tr>
<td></td>
<td>To modify the date click on the calendar and select the new date.</td>
<td></td>
</tr>
<tr>
<td></td>
<td>This due date is recorded in the loan tracking record for this request</td>
<td></td>
</tr>
</tbody>
</table>

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<th>FIELD</th>
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</tr>
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<tbody>
<tr>
<td></td>
<td>and is used when calculating whether or not an item is overdue.</td>
<td></td>
</tr>
<tr>
<td></td>
<td>This due date</td>
<td></td>
</tr>
<tr>
<td></td>
<td>• appears on the cover page when printed for the request</td>
<td></td>
</tr>
<tr>
<td></td>
<td>• is included in the Shipped message (if this is an ISO ILL transaction)</td>
<td></td>
</tr>
<tr>
<td></td>
<td>• displays in the audit record</td>
<td></td>
</tr>
<tr>
<td>Renewable</td>
<td>Select Yes/No. The default value displayed can be modified.</td>
<td></td>
</tr>
<tr>
<td></td>
<td>The Renewable flag Yes or No</td>
<td></td>
</tr>
<tr>
<td></td>
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<td></td>
<td>• displays in the audit record</td>
<td></td>
</tr>
<tr>
<td></td>
<td>Renewable can be hidden on the Loan (LON) tab.</td>
<td></td>
</tr>
<tr>
<td>Item Type</td>
<td>The Item Type drop down is hidden by default.</td>
<td></td>
</tr>
<tr>
<td></td>
<td>Select a value to indicate the item type being loaned from the Item Type drop down.</td>
<td></td>
</tr>
<tr>
<td></td>
<td>The default values for the Item Type drop down are configured in Table Maintenance → Miscellaneous → Supplied Item Type</td>
<td></td>
</tr>
<tr>
<td></td>
<td>You can hide or display the Item Type drop down as well as modify the values that display.</td>
<td></td>
</tr>
<tr>
<td>Conditions</td>
<td>From the drop down select a value to indicate any condition to be observed by the requester.</td>
<td></td>
</tr>
</tbody>
</table>

https://help.oclc.org/Resource_Sharing/Relais_IILL/Loan_items_and_manage_loans/Loan_an_item

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The Condition

- appears on the cover page when printed for the request
- is included in the outgoing Shipped message (if this is an ISO ILL transaction)
- displays in the audit record

The default values for the Conditions drop down (as found in the ISO ILL standard) are:

- Library Use Only
- No Reproduction
- Client Signature Required
- Special Collections Supervision Required
- Other

These values are a subset of the entries in Table Maintenance → Code Tables → ISO Supply Conditions

You can hide the Conditions drop down as well as modify the values that display.

If you are updating a single request the input box for the Exact Query is highlighted so that the next request can be entered, e.g., via a barcode reader, making it easy to process a batch of requests.

### Multiple items

If there are multiple items to be loaned for one request, click Multi-volume (before or after the first item is loaned).

Wand in or enter each barcode separately, click Enter to update the item as a Loan (LON) and move to the next row in the grid to enter the next barcode.
Caution: If an item has a specific due date or conditions that is different from the other items be sure to modify those values prior to entering the barcode.

- A separate loan tracking record is created for each physical item loaned.
- A single cover page is printed for the request.

**Autofill the barcode**

If you are using NCIP or eSIP and you use the Relais request number as the barcode then you can configure the auto fill option.

When this option is turned on, when the request displays the Barcode field is populated automatically with the request number, you do not need to enter it.

Note: If multiple items have been shipped for a request then the auto fill option does not work, you need to enter each barcode for each item.
Auto removal of diacritics

If you are using NCIP or eSIP and your NCIP/eSIP server cannot create a temporary bib record if the title or author in the AcceptItem message includes diacritics you can turn on an option to strip the diacritics. When this option is turned, Relais removes diacritics prior to generating the AcceptItem message.

For example:

<table>
<thead>
<tr>
<th>ORIGINAL TITLE/AUTHOR</th>
<th>AFTER DIACRITICS REMOVED</th>
</tr>
</thead>
<tbody>
<tr>
<td>L’Étoile du Sud</td>
<td>L'Etoile du Sud</td>
</tr>
<tr>
<td>Jean François Paschal Grousset</td>
<td>Jean Francois Paschal Grousset</td>
</tr>
<tr>
<td>Örtlich betäubt</td>
<td>Ortlich betaubt</td>
</tr>
<tr>
<td>Günter Wilhelm Grass</td>
<td>Gunter Wilhelm Grass</td>
</tr>
<tr>
<td>Núria Añó</td>
<td>Nuria Ano</td>
</tr>
<tr>
<td>Núvols baixos (Low Clouds)</td>
<td>Nuvols baixos (Low Clouds)</td>
</tr>
</tbody>
</table>

Note: Diacritics are removed only from UTF-8 strings containing Latin alphabets. UTF-8 strings containing non Latin alphabets such as, Chinese or Arabic are not altered.

Undo

If you have updated a request in error it is possible to undo the update and enter the correct information.

Click Undo
When the confirmation message displays, click Yes

This reverses the update in Relais allowing you to enter a different barcode, open a new request etc.

If using NCIP or eSIP and the loan is:

- to another library, a CheckinItem message is sent to check the item back in in the local library system
- to your patron, a manual update to the local library system is needed to reverse the actions triggered by the AcceptItem message

For a multi-volume loan, click on each barcode separately and click Undo

**Reset**

If you have entered a barcode and changed other information in error but before updating the loan, click Reset to display the request as it was when opened initially.

**Shared system - Loan to another library**

If you are part of a shared system and the request is from another library in your system the Ship Loan tab displays
• Enter / update all the fields as described above for the Loan tab and click Loan or Enter.
• The request is updated in Relais as a Ship Loan (SHP) and a series of updates is done.
  ◦ An audit record is added to the request.
  ◦ A loan tracking record is created in Relais.

**Configure the Loan and Ship Loan tab**

Any of the elements on the Loan (LON) tab can be configured, this includes, changing the name of the tab, changing the text of each label and button, selecting which elements to hide/display. All configuration can be done based on staff group.

Specific configurations are noted below.

**Due date**

• The due date can be hidden on the Loan (LON) tab if you are using NCIP or eSIP and the due date is set by your local library system. Default = display

**Renewable flag**
• The default value for the Renewable flag can be set to Yes/No. Default = Yes
• The Renewable flag can be hidden or displayed. Default = display

**Item Type**

• The Item Type drop down can be hidden or displayed. Default = hidden
• The values in this drop down can be modified. While the default values are based on the entries from Table Maintenance → Miscellaneous → Supplied Item Type, the values that display in the tab can be further configured if required.

**Conditions**

• The Conditions drop down can be hidden or displayed. Default = display
• The values in this drop down can be modified. While the default values are based on the entries from Table Maintenance → Code Tables → ISO Supply Conditions the values that display in the tab can be further configured if required.

**Autofill**

• The barcode can be autofilled with the request number if using NCIP or eSIP. Default = do not autofill