Configure loan codes and policies

Learn how to add, update, and remove policy codes in Relais ILL.

Overview

In each library and patron record a loan code can be set. This loan code determines the following information used when loaning documents and managing loans.

- The default due date (this can be modified by staff at the time the loan is done)
- The renewal period (this can be modified by staff at the time a renewal is done)
- How many overdue notices will be sent
- After how many days each overdue notice is sent and the text of the message to include with each notice.

Update a loan policy

1. Login to Table Maintenance.
2. Select the Loans tab, Loans.
3. Select the Loan Policy code you wish to edit from the list at the bottom of the screen (it will highlight when selected).
4. Update the values for each element of the code as described in the table below.
5. Select Update.
Add a loan policy code

1. Login to Table Maintenance.
2. Select the Loans tab, Loans.
3. Select the Loan Policy code you wish to delete from the list at the bottom of the screen (it will highlight when selected).
4. Enter the values for each element of the code as described in the table below.
5. Select Add.

Delete a loan policy code

1. Login to Table Maintenance.
2. Select the Loans tab, Loans.
3. Select the Loan Policy code you wish to edit from the list at the bottom of the screen (it will highlight when selected).
4. Select Delete.

Caution: Codes that are associated with data in your database cannot be deleted. For example, you cannot delete a policy code if it is assigned to a Library or Patron record. This is done to maintain the integrity of the database.
<table>
<thead>
<tr>
<th>FIELD</th>
<th>CHARACTERS</th>
<th>DESCRIPTION</th>
</tr>
</thead>
</table>
| Loan Code     | 1          | A single, unique character used to define a specific loan policy case. e.g. 1 = Domestic. Every registered Library/Patron must be assigned a valid loan code. Caution: If there is no loan code specified in the library record, the 'first' value in the loan code table will be used. The default codes are:  
|               |            | • Domestic  
|               |            | • International  
<p>|               |            | • Patron |
| Loan Period   | 4          | The default number of days in the loan period. This is used to calculate the default due date. Staff can modify the due date when updating a request as a loan. |
| Description   | 25         | The description of the loan code.                                                                                                           |
| Renewal       | numeric up to 9999 | The default number of days a request is renewed.                                                                                           |
| Renewal form  | n/a        | Whether the renewal date is calculated from the original due date or the current date. Default is Due Date.                                 |
| Overdue 1     | numeric up to 9999 | The number of days after the due date before the first Overdue Notice is generated.                                                         |
| Overdue 2     | numeric up to 9999 | The number of days after the due date before the second Overdue Notice is generated.                                                       |
| Overdue 3     | numeric up to 9999 | The number of days after the due date before the third Overdue Notice is generated.                                                        |
| Final Overdue | numeric up to 9999 | The number of days after the due date before the final Overdue Notice is generated.                                                       |</p>
<table>
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<th>DESCRIPTION</th>
</tr>
</thead>
<tbody>
<tr>
<td>Renewal</td>
<td>100</td>
<td>Displays on the Loan Notice when a loan has been renewed.</td>
</tr>
<tr>
<td>Renewal Refused</td>
<td>100</td>
<td>Displays on the Loan Notice when a request for renewal has been refused.</td>
</tr>
<tr>
<td>Recall</td>
<td>100</td>
<td>Displays on the Loan Notice when a loan has been recalled.</td>
</tr>
<tr>
<td>Overdue 1</td>
<td>100</td>
<td>Displays on the Loan Notice when a loan is passed the due date by the number of days specified in the Overdue 1 period field.</td>
</tr>
<tr>
<td>Overdue 2</td>
<td>100</td>
<td>Displays on the Loan Notice when a loan is passed the due date by the number of days specified in the Overdue 2 period field.</td>
</tr>
<tr>
<td>Overdue 3</td>
<td>100</td>
<td>Displays on the Loan Notice when a loan is passed the due date by the number of days specified in the Overdue 3 period field.</td>
</tr>
<tr>
<td>Final Overdue</td>
<td>200</td>
<td>Displays on the Loan Notice when a loan is passed the due date by the number of days specified in the Final Overdue period field.</td>
</tr>
</tbody>
</table>