

Loaning Items

The process of lending material to users requires that items are recorded in the database unless the item to be loaned is recorded as a [Manual Loan](#). This provides for an item to be temporarily recorded for loan but is not recorded permanently in the database.

For most lending, an End User record should exist in advance, either created manually through the [Users module](#), or by importing user records from an external application such as Active Directory. Where this is not the case, [create a Temporary User record](#).

There are two steps in the loans process:

1. Select the End User who is the recipient of the item being loaned
2. Select one or more items from the database



NOTE: It is recommended that barcodes are used on all stock items to make the process of issuing materials for loan fast and simple. The barcode scanner should be set to automatically send an Enter instruction after the barcode to further simplify the process and avoid the need for manual entry using the mouse or keyboard to complete the transaction. We recommend the use of Honeywell Eclipse Barcode Scanners which can be attached to a keyboard via a USB connection.

It is also possible to [loan an item directly from the copy record in the Locations function](#).

To access Loans, select the menu **Functions > Loans > Loan an Item**.

The following screen will open. This can be left open in a Browser Tab so that it is always available

Step 1: Selecting the End User

Search for the user as described in [User Search](#)

If more than one user is found by the search, highlight the End User record wanted or select the User by clicking on the User Name.



Note: If a search for a user is unsuccessful, after three consecutive attempts, the Create Temporary Borrower screen will be displayed

Maximum loans

If the End User has reached the maximum number of loans allowed, the following alert is displayed:



Click **Override** to continue with the loan and ignore the message, or **Cancel** to cancel the loan transaction.

Outstanding fines

If Fines has been set up within the application and is applied and the user has outstanding fines, the following message is displayed:



Click **Yes** to continue with the loan anyway, or **No** to cancel the loan.

Adding a Temporary Borrower

If the End User is not registered in the application and does not have an End User account, a [Temporary User account](#) can be created.

Step 2: Selecting the item(s) to lend

Once the End User has been selected, the system prompts for the item(s) to be lent.

Items are identified by their unique Barcode Number

Items not recorded in the database or which have their barcodes missing - can be processed as [manual loans](#).

For a normal item loan:

Scan the barcode of the item to be lent, by using a barcode scanner or manually enter the barcode number. Multiple items to loan to the same End User can be scanned one after the other in succession.

Where a barcode is manually entered, click **Loan Item** or press Enter.

If the item has a reservation on it, the following message appears with three options:



Click **Continue** to continue with the loan, or click [Request Maintenance](#). This function displays the waiting list from where the administrator can select the next person in priority order to loan.

When the loan transaction is executed, the details of the loan transaction are displayed, with the latest item highlighted in green:

Items already lent to the End User today, and all current loans, can be viewed using this form display.

Due Date

The Due Date is calculated based on the loan period assigned for the [location](#) or the [copy item](#), taking into account [holidays and weekends](#) (defined in System Management using the Non Working days calendar function) and also the End User's [Leave Date](#) (recorded in the End User Account Additional Information form).

The Due Date can be changed by the administrator when processing the Loan Transaction:

1. Click the calendar icon next to the item.
2. Use the navigation arrows to switch between months and years.
3. Choose a date and click on it, or click **Close** to close the calendar without selecting a date.

The revised due date is displayed.

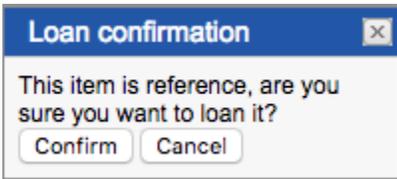


Note that where the Due Date is affected by the End User's Leave Date, this can be changed to any date up until and including the Leave Date.

Ensure that the Due Date is correct and any changes are made before this transaction is completed. The Due Date cannot be amended afterwards, unless the item is Renewed.

Reference copies

If the item is defined as a Reference copy, the following message appears:



Click **Confirm** to continue with the loan, or **Cancel**.

Step 3: Completing the loan transaction

The loan of the item is now complete.

Additional items can be issued to the same person at this point if required, by continuing to scan or enter item barcodes.

Selecting a New User

To lend items to another borrower, click **Cancel**.

The End User selection screen is presented ready to perform the next Loan Transaction.

Experiencing problems with loans and requests? See the [Troubleshooting Guide](#) and [How do I ...?](#)