Active Loan Requests

This table will be shown when there are active **Loan** requests in the system based on the filters assigned e.g. Available.

> ✅ If this table does not appear when the function is invoked, then either there are no current Loan Requests or the filters need adjusting, for example to show All Requests rather than ones that can only be fulfilled immediately.

The data table is is presented in a row and column format, with a row for every requested title.

Select column

An administrator can select and complete one or more Requests and then use one of the function buttons at the top of the screen, for example Confirm, Cancel or Export selected requests.

> ⓘ **Tip**
>
> Select all rows by clicking the checkbox in the column header

Available

This column indicates whether the Title requested is currently available. There are three types of availability:

 Green tick indicates the Title has copies available to be loaned at the office that the Administrator has selected.

 Orange tick indicates the Title has no copies in the office selected but there are copies in another office. Titles with an orange tick may require the administrator to use the Transfer function, found under **More** in the Actions column.

 Red X indicates the Title has no copies currently available in the selected office or any other office. Requests with this status will not be fulfilled until a copy becomes available or another copy is purchased.

Note that this icon IS NOT DISPLAYED unless the Availability filter is set to All or Unavailable.

Title

The Title of the requested record is displayed and can be clicked on to display the full record in a popup window. If the request is for a specific volume or journal issue, then these details will be shown. This is provided to give the administrator more information about the title that has been requested.
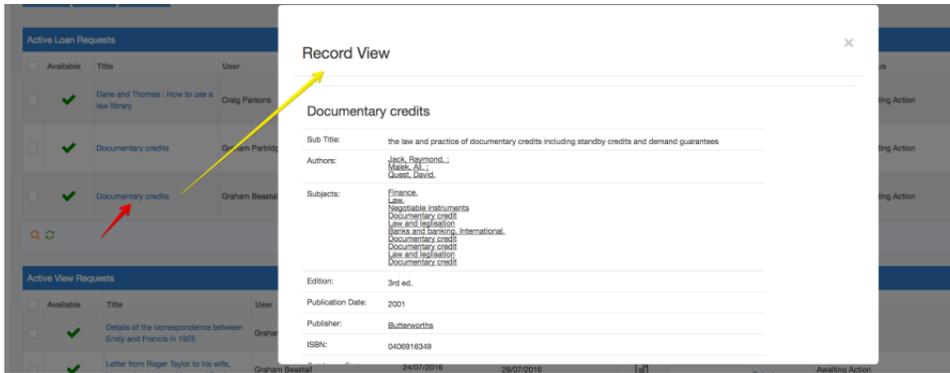
User

The name of the End User is shown with the first name then surname followed by the user ID .

Priority

Shows the priority number. If only one End User has currently requested this title then it will simply show as **1**. However, if more than one user has requested it, a separate row will be shown for the request for the same title and the priorty will then show as an increasing number (incrementing by one for each request made for the title). The administrator can change the priority using the Change Priority function found under the **More** icon in the Actions column.

Type & Date

The date the request was made is shown along with the Type. The reason the type of Request is shown here, is that the same table will be used in other parts of the system and needs this information for it to be meaningful.
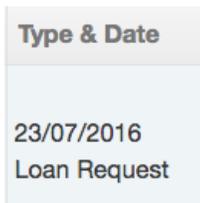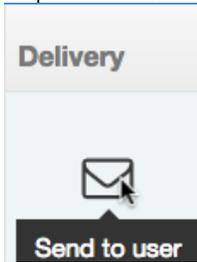

Delivery

The delivery preference that the End User may have made when the request was placed is shown. Delivery can either be Send or Collect.

Send
Requests that have a Send Delivery type are shown with the following icon:

Collect
Requests that have a Collection Delivery type are shown with the following icon:

The administrator can hover above the icon to show the tool tip and click on it to change the delivery type, providing the other delivery type is available for the office the End User is associated with. (This is determined in the Library Infrastructure maintenance function in System Administration).

Where the delivery status can be changed, and when Administrator clicks on it, the icon changes to show the other delivery type.

Expiry Date

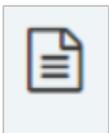If the requestor specified an expiry date, i.e. if the End User requires the item by a specified date, then this will be shown in red.
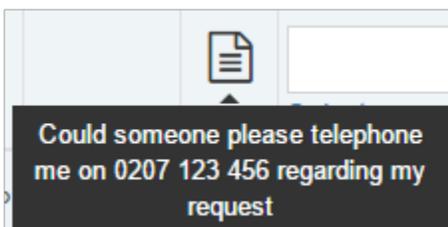

After this date, the request will automatically be cancelled by an automated task .

Note

If the requestor has added a note when making their request, this will be shown by a Note icon:

Hovering over this icon, will show the note that the End User entered.

Barcode & Shelf Reference

The administrator must use this function to either manually enter a barcode number or scan the barcode of the physical item OR use the Select function in the form for that Request.
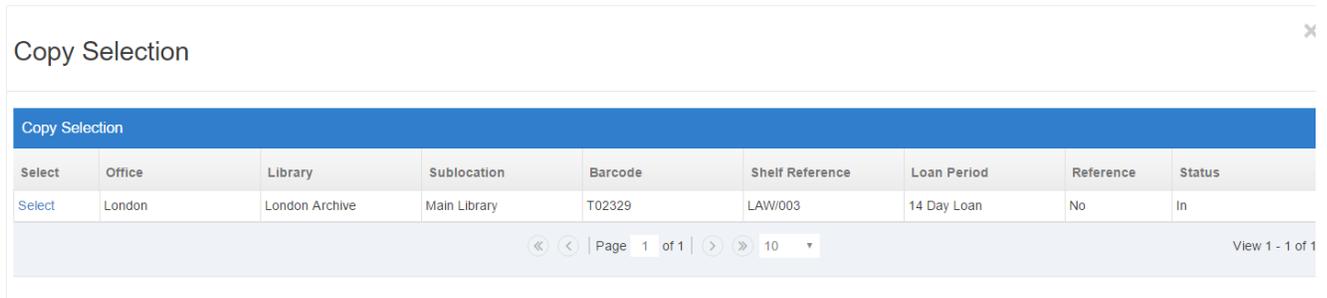

Manually Entering or Scanning a Barcode

The Administrator can identify the item to fulfil the request in a number of ways:

- manually type a barcode number i.e. if the item has already been retrieved from the shelf and it is in front of the administrator

- the barcode can be captured using a barcode scanner, first ensuring the cursor is flashing in the Text input box.

Once entered press the Return or Enter key on the keyboard to submit it and if item is found its details will be shown.

- Use the in form **Select function** Click on the Select link for the item to open up a pop up window showing the available copies:

The table shown is made up of the following Field Columns:

Select

User must use this to select the copy that they wish to use to fulfil the request.

Office

The office of the shown copy is provided

Library

The name of the Library location is provided

Sub Location

If the copy has a Sub Location, this will be shown otherwise it will be empty

Barcode

Shows the barcode of the copy

Shelf Reference

If the copy has a Shelf Reference this is shown.

Loan Period

Shows the loan period assigned to the copy

Reference

If the copy is Reference, it will show **Yes,** if not then it will show **No**

Status

The current status of the copy will be shown, in most cases this will show **In** (or localised wording) as this table will not show copies that are not currently available.

Click Select to for the copy to use. When Select is clicked, the pop up window will close and the main Request form will display. The Request Table **Barcode and Shelf Reference** column and row will now show the Barcode and if available the Shelf Reference:

	Available	Title	User	Priority	Type & Date	Delivery	Expiry	Note	Barcode & Shelf Ref	Due Date	Status	Actions
☑	✔	Dane and Thomas : How to use a law library	Craig Parsons (7)	1	24/07/2016 Loan Request	👤			T02329 ✗ Select Another Shelf Reference LAW/003		Copy Assigned	✔ Confirm ✗ Cancel More ▾

Next to the Barcode entry is a Grey X, this can be used to remove this barcode and on clicking this, it reverts back to its unselected state. The Status shows that Copy has been Assigned.

> ✅ A barcode is required in order to process a Loan Request.

Due Date

Due Date will only be available if the Delivery Type is **Send**. This is because if the delivery type is **Collection**, the Due Date will be assigned at the point when the End User visits to collect their requested Item.

If the Delivery is set to **Send** then the Due Date column shows a Date Control which will be set by default to the Date based on the Loan Period assigned to the copy.

	Available	Title	User	Priority	Type & Date	Delivery	Expiry	Note	Barcode & Shelf Ref	Due Date	Status	Actions
☑	✔	Dane and Thomas : How to use a law library	Craig Parsons (7)	1	24/07/2016 Loan Request	✉			T02329 Select Another Shelf Reference LAW/003	29/08/2016 📅	Copy Assigned	✔ Confirm ✗ Cancel More ▾

The Due Date can be changed by clicking onto the Date control. The administrator can select an alternative due date.

If a new due date is assigned, the Status will show the text **Due Date succesfully changed**

Due Date	Status
31/08/2016 📅	Due Date successfully changed

Status

As seen in some of the examples above, the Status will change based on an action performed. The various status available are:

Action Required

This is the default status and will be shown for every row before any changes are made to the request.

Due Date Succesfully Changed

Will be shown if the administrator has changed the due date.

Priority has been changed

Will be shown when the priority has changed.

Expiry Date Updated

Will be added in the future and will show if the End User has changed the expiry date.

Copy Assigned

Will be shown when a barcode has been selected or added.

Request Transferred to Office X

Will be shown if the request has been transferred to another office.

Request Transferred From Office X

Will be shown if the request has been transferred back from another office i.e. they reject the request.

Request View Date Updated

This status will show if the View Date has been changed (a future enhancement, not currently available)

Actions

The Actions column can contain up to three Action buttons:

✓ Confirm   ✗ Cancel   More ▾

Confirm

Clicking the Green button will confirm the request and one of two actions will be performed depending on the Delivery type selected:

Delivery = Send

When delivery is set to Send and the administrator clicks on Confirm, it Loans the item immediately using the Due date selected or assigned. On Confirmation (when the Confirm Blue Button is selected), the entry will be removed from the table and a green confirm message across the top of the screen will show the request has successfully been confirmed.

Delivery = Collection

When delivery is set to Collection and the administrator clicks on Confirm, it moves the request into the **Awaiting Collection** tab and if enabled, will send an email to the End User informing the individual that the item is ready for collection.

Cancel

Clicking this Grey button will open a pop up asking the administrator to confirm that the Request is to be cancelled:

Are you sure you wish to cancel the selected request(s)?

Cancel   OK

If the administrator clicks on **Cancel** then the pop up will close and the request will not be cancelled.

If the administrator clicks on **OK** then the pop up will close and the request selected will be cancelled and moved into the **History** tab.

More

When selected, and the record Request is of a particular status, two additional Action options could appear under the More button:

More ▾

Transfer
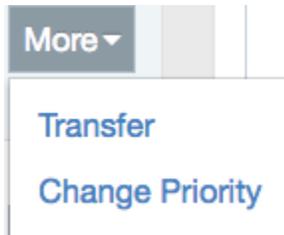
Change Priority

Transfer

Allows the request to be passed to another office. This option will only appear if there is a copy available in another office. See section on **Transfers**

Change Priority

This option will only appear if more than one End User has requested the same title. This function allows the administrator to change the priority as to who will have their request processed first. The default Priority, is based on the order of request. See section on **Change Priorty**

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