

## 4.3 OUTSIDE LOAN

There are three ways for lending material for outside loan to the member:

- enter the item identification number (accession number or loan number) under "AN/LN="
- find the item in the catalogue and then select it from the list of found copies
- select the copy that is reserved for the member (status *O* – reserved available copy, *W* – waiting on the shelf, or *S* – on loan (reading room))



Note:

*For outside loan, check if the **Outside loan** radio button is selected before you click the **Lend** button.*

The item will be added to the member's list of material. The loan period expiry date is calculated automatically based on the loan period specified for this type of material in the time parameters table (see chapter 2.1).



Note:

*When defining the loan period expiry date, the library's calendar is taken into account, which means that the loan period cannot expire on a day when the library is closed (see chapter 2.2). In such a case, the loan period expiry date is set to the following working day.*



Note:

*In libraries with departments loan period and calendar of the department to which you are signed in as a user are taken into account if different time parameters and calendars are defined for individual departments.*

### **Precondition**

If the member or the material has any restrictions that might restrict or disable the loan, an appropriate warning message will be displayed. In the following cases you can decide if you wish to lend the material despite the restrictions:

- the member has already reached the maximum allowed number of copies on loan
- the availability level (996/997p) set up for the item restricts the loan. This usually applies to the availability level 4 – limited access – reading room, 5 – limited access – with author's permission or 6 – contents of document not accessible
- the status (996/997q) set up for the item restricts the loan. Usually this applies to status 6 – damaged

- the copy is reserved for some other member (reservation of an available copy (status O) or the material is waiting for the member (status W))
- the material with the same COBISS-SI.ID is reserved for the member (status R); if you put the material on loan despite that, the reservation will be deleted
- there is a reservation for another member (the material has status R)
- a member has already borrowed material with the same COBISS.SI-ID in another department (a special parameter is turned on)
- as a rule, the last issue of a serial cannot be borrowed from a library (a special parameter is turned on)

The material **cannot be put on loan** in the following cases:

- the item's identification number does not exist
- the item does not belong to the department in which you wish to put it on loan (this applies to the libraries in which loan is organized loan by departments)
- the item belongs to the department in which you wish to put it on loan, but it is currently on interdepartmental loan in another department
- the library will not permit the loan for this type of material (the loan period is not specified in the time parameters table)
- the item is already on loan to a member, retained or lost by a member or reserved for reading room use
- the item is on loan, retained or lost by another member
- the availability level (996/997p) set up for the item disables the loan. This usually applies to availability level 7 – completely inaccessible (archival copy)
- the status (996/997q) specified for the item disables the loan. This usually applies to any status other than 6 – damaged
- loan restriction 0d (996/997u) specified for the copy prevents outside or reading room loan
- the **Lend** button or the **Outside loan** radio button are not active because some restriction preventing outside loan applies to the member (Entry denied, Internet access only, Outside loan not allowed, Membership card retained)
- the **Lend** button is inactive because the upper limit of total debts has been exceeded or the oldest date of entered debts is greater than the time limit set (restrictions taken into account are defined by a special parameter upon the library's request)

**Tip:**

Upon the library's request, a special parameter can be set up, where in the case of unsettled debts in a specified period, a note will be automatically displayed before conditions for loan restrictions are activated.

- the library does not allow the loan to the members which have at least one item on loan for which loan period has already expired.

**Tip:**

Upon the library's request, the material that is currently on loan to another member can be put on loan by setting up a special parameter. If you wish to put such material on loan, a note will appear indicating that the item is on loan, and you can decide whether the item will be entered as returned under the first member at the same time as it is put on loan to a new member. You can also charge a fine (if a library automatically enters debts for a fine), but you cannot check if any reservations exist for the material as this procedure allows the quickest way of transferring the material to another member; for this reason, no additional controls are available. This is common practice in school libraries.

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### 4.3.1 Lending by entering the item's ID number

If the material you intend to put on loan is in front of you, record the loan by entering the item's identification number:

**Procedure**

1. Enter the item's accession number or the loan number under "AN/LN=" manually or by using a reader.
2. Check if the **Outside loan** radio button is selected.
3. Confirm the entry by clicking the Lend button.

**Note:**

*If your reader is set up to automatically confirm the entry, activate the **Lend** button before entering the accession number.*

#### 4.3.1.1 Lending serials

Serials with unbound or partially bound issues can be lent by entering a comma (",") and the loan unit after the accession number. The loan unit can be the number of the individual issue (if the issues are not bound) or a range of issue numbers bound together.

Serials that do not have separate issues (e.g. serials published annually that do not have numbering on the issue level) or serials where all the issues are bound together, can be put on loan, if you only enter the accession number or the loan number.



Example:  
If you wish to lend issue number 10:  
AN/LN= 220030010,10  
If you wish to lend issues 1 to 5, which are bound together:  
AN/LN= 220030010,1-5

If you only enter the accession number for a serial that has unbound or partially bound issues, the **Select issues** window will open. Issues in the list are sorted from newest to oldest issue number. For each individual issue or partially bound issues, the loan status (available, on loan or loan restriction) will be displayed in addition to the issue details. You can lend one or several items at the same time.



Note:  
*Upon the library's request, a special parameter can be set to disable a loan of the last issue of a serial in the current year or the last issue of a volume available in the library.*

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### 4.3.2 Loan with selection from catalogue

If a member has not found the material they wanted to borrow, you can help the member by finding and selecting the material from the catalogue.

#### Procedure

1. In the **Home library material** window, click the **Catalogue** button.

The **Catalogue** window will open. It is divided into two parts: the upper part with search fields and the bottom part for displaying search results.

2. Enter your search request in the search window and click the **Find** button (see chapter 4.11).

If your search is successful, the number of found objects and a list of those objects will be displayed. Bibliographic data (title, author, etc.) is first displayed for every found material and followed by the list of copies (accession number, call number, etc.). More about displaying search results in chapter 4.11.



Note:  
*In libraries with departments searching of copies is restricted to the department in which you are currently logged in as a user. This restriction can be changed by selecting the searching option in all departments or in a particular department from the drop-down list in the search window. Copies on interdepartmental loan can be searched in the parent department or in all departments.*



Note:

When searching in the *Catalogue* window, only data on those items for which the holdings are defined is displayed. Data on items which are de-accessioned or which have no accession or call number, availability level or status is not displayed.

Items that are not displayed in the catalogue can be found in another way, if necessary, e.g. by using the **Class / Search** method in the **Field 996/997** class.

3. Select the item and click the **Lend** button.

### 4.3.3 Interdepartmental loan

In libraries where loan is organized by departments (e.g. general libraries) only the copies which have sublocation of the department (in subfield 996/997d or 996/997e) can be put on loan in a particular department. Otherwise you will receive an automatic notification warning you that the copy does not belong to that department.

Interdepartmental loan enables you to put a copy on loan for a certain period of time to another department where you can further lend it.

The following conditions must be met in order to perform interdepartmental loan:

#### *Precondition*

- In the local code list *Sublocation* the relation between the sublocation and the department must be defined (e.g. *Y – Youth department#01*).
- In the local code list *Departments (CODE 301)* the list of all departments must be defined.
- In Home library you must enter all departments that will participate in interdepartmental loan. The procedure of entering data on department is described in the *COBISS3/Application administration* user manual (see chapter 2.1.4).
- All copies of material intended for loan must have sublocation in call number in subfield 996/997d, and in case of copy relocation for indefinite period in subfield 996/997e as well.

A department that owns a copy is hereinafter referred to as **parent department** and a department to which the copy is lent is referred to as **host department**.

Interdepartmental loan of material to the host department is recorded in the parent department in the **Home library material** window. The loan procedure between departments is completely the same as loan to the member.

Interdepartmental reading room loan is not possible; for this reason, the **Reading room loan** radio button is inactive.

#### *Procedure*

1. Highlight the **Department** class and select the **Class / Home library material** method.

The **Search by key** window will open where you will enter two digit host department ID.

2. In the **Department** class you can find the host department in two ways:

- by entering the two digit department ID

In the **Search by key** window, enter the department ID.

- by selecting the department in the **Search – Department** search window.

If you leave the field blank in the **Search by key** window, the **Search – Department** window will open. Use it to search all departments by clicking the **Find all** button. You can sort the list of results by the desired attribute and select the desired host department then.



Tip:

If the department is already in the workspace, select it with the mouse and then select the **Home library material** method from the shortcut menu. If you want to put a copy on interdepartmental loan in a quicker way, select the **Put on interdepartmental loan** method.

You can put the copy on loan in the **Home library material** window:

- by entering the ID of the item in "AN/LN="
- by searching and selecting in the catalogue

The copy will be added to the list of material in the department and the status of the copy is *D – interdepartmental loan*. Loan expiry date is automatically calculated based on the loan period which applies in the parent department. The calendar of the parent department is also taken into account.



Note:

*Copies put on interdepartmental loan can be lent only to the members in the host department. Further loan of the material through interdepartmental loan to some other department is not possible.*

### 4.3.3.1 Interdepartmental loan from the department without computerised loan

As a rule, material can be put on loan to another department only in the parent department. In departments where loan is not supported by the COBISS3/Loan software, the procedure cannot be performed. In that case, a transaction can be performed in the host department, i.e. in the department where you wish to put material on loan.

**Precondition**

Material belongs to a department where loan is not supported by the COBISS3/Loan software.

1. Log in to the host department.

You can log in by:

- highlighting the **Department** class and selecting the **Transition to another department** method and then selecting the host department from the department list
- selecting the **System / Settings / Lending department** from the menu bar

**Procedure**

3. In the **Department** class, find the host department in the following two ways:

- by entering the two-digit department ID  
Enter the department ID in the **Search by key** window.
- by selecting the department in the **Search – Department** search window

4. Highlight the **Department** object and select the **Put on interdepartmental loan from department without computerised loan** method.

The **Interdepartmental loan from department** window will open.

5. Under "Department ID", enter the parent department ID without computerised loan.

A note will appear if the department ID with computerised loan was entered or if the department does not exist.

6. In the **Interdepartmental loan** window, under "AN/LN", enter the identification number of the item.

Material cannot be put on interdepartmental loan if it does not belong to the selected department or if it was already put on interdepartmental loan.

Material is entered as put on interdepartmental loan in the host department, where you can put it on loan to members.

**Tip:**

You can search for material that was put on interdepartmental loan from the department without computerised loan in the **Unavailable material** search window by selecting the department without computerised loan under "Parent department", making a tick under the value *No* under "Returned material", and selecting the status *d – interdepartmental loan* under "Loan status".

### 4.3.3.2 Interdepartmental return of material to a department without computerised loan

If loan in the parent department is not supported by the COBISS3/Loan software, the procedure of returning material that was borrowed interdepartmentally must be performed in the department that borrowed the material (host department).

#### *Precondition*

Material is available and belongs to the department where loan is not supported by the COBISS27Loan software.

#### *Procedure*

2. Log in to the host department.

You can log in by:

- highlighting the **Department** class and selecting the **Transition to another department** method and then selecting the host department from the list of departments
  - In the menu bar, select the **System / Settings / Loan department** method
7. In the **Department** class, select the parent department. You can do this in the following two ways:
- by entering the two-digit department ID  
In the **Search by key** window, enter the department ID.
  - by selecting the department in the **Search – Department** search window
8. Highlight the **Department** object and select the **Return interdepartmentally to department without computerised loan** method.

The **Interdepartmental return from department** window will open, where you can enter the department identification number under »Department ID«.

If ID of the department with automated loan was entered or if the department does not exist, a note will be displayed.

9. In the **Interdepartmental return** window under »AN/LN«, enter the identification number of the item.

If the material in the host department is not available or if it was not put on interdepartmental loan, a note will be displayed.

The material is entered as interdepartmentally returned from host department.