I need to change the Lending and Borrowing Due Dates for ILLiad, how do I do this?

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Symptom

• You need to update requests to a new Lending Due Date and you need to know how to do this

Applies to

• ILLiad

Resolution

Here are the steps you need to take to update the Lending Due Dates:

1. You need to know what parameters you want to use. For example, if you are looking for requests at the Transaction Status of "Item shipped" that has a Due Date currently 2/1/2020 or greater and it is a Lending request and when you want the new Due Date to be 6/1/2020.

Use ILLData

go

Update Transactions
Set DueDate = '6/1/2020'
Where TransactionStatus = 'Item Shipped'
and ProcessType = 'Lending'
and DueDate > '2/1/2020'
go

2. If you are hosted by OCLC, please contact OCLC Support.

3. After running the Due Date update, you should follow the example of the Bulk Processing Existing Loan Requests and set up an Email Routing rule and a template to send to the Lending requests that have the Transaction Status of Item Shipped. Follow the documentation on Managing ILLiad Workflow during COVID-19.

4. Open up the ILLiad Client again and send out the Notifications to the Lending Library with the new Due Date.

Here are the steps to take for updating Borrowing Due Dates:
1. You need to know what parameters you want to use. For Example, if you are looking for requests at the Transaction Status of "Checked out to Customer" that has a Due Date currently 2/1/2020 or greater and it is a Borrowing Request and you want the new Due Date to be 6/1/2020.

   Use ILLData
   go

   Update Transactions
   Set DueDate = '6/1/2020'
   Where TransactionStatus = 'Checked out To Customer'
   and ProcessType = 'Borrowing'
   and DueDate > '2/1/2020'
   go

2. If you are hosted by OCLC, contact OCLC Support to do this.

3. With Borrowing, you will need to send the Renewal Request to the lender. When you renew a request, your Borrowing Renewal Days will be added to the Due date you have set up in the Query above. If your BorrowingRenewalDays is set to 14, then each one you renew will be updated to 6/15/2020 and that will be the new Due Date as the request to the lender.

4. You should follow the example of the Bulk Processing Existing Loan Requests and set up an Email Routing rule and a template to send to the Lending requests that have the Transaction Status of Item Shipped. Follow the documentation on Managing ILLiad Workflow during COVID-19.

5. Open up the ILLiad Client again and send out the Notifications to the Borrowing requests that are "Checked out to Customer" with the new Due Date.