

# Loanable collections (Bundles)

This new feature adds the ability to create bundles of items that can be checked out as a single entity. A bundle could be a box of related items from your library or a collection of musical scores which need to be circulated together.

You create a new collection level bibliographic record and add items to it in the usual way. Those items can then be converted to a bundle by adding existing item records to them using their barcodes. The items will remain attached to their original records and be marked as 'not for loan'.

## Configuration

First you need to make some configuration choices.

Item types - you may want to create a separate item type to identify your bundles. *On DLR the item types are Collections and Items.*

Circulation rules - you can optionally create circulation rules for your bundle item type.

There are two system preferences which control the status values used with bundles:

- BundleNotLoanValue. *On DLR this is set to value 3 = 'Added to bundle'*
- BundleLostValue. *On DLR this set to LOST value 5 = 'Missing from bundle'*

## Creating bundles

The bundle functionality will only be displayed if you create a catalogue record with the Leader, (000 MARC tag) position 7 set to 'c' for Collection.

Note: It might be useful to have a separate MARC bibliographic framework for bundles with the 'c' set as a default value if you will use bundles regularly. You can also add any custom fields to the template that might be unique to bundles such as size or weight. *On DLR the 'c' is set automatically via the Collection framework.*

## 000 - Leader

0-4 Record size	(auto-filled)
5- Record status	n- New
6- Type of record	a- Language material
7- Bibliographic level	c- Collection
8- Type of control	No specific type
9- Character coding scheme	a - UCS/Unicode (auto-filled)
10-16 indicator/subfields/size	(auto-filled)
17- Encoding level	7- Minimal level
18 - Descriptive cataloging form	a- AACR 2
19 - Multipart resource record level	Not specified or not applicable
20-24 entry map & lengths	(auto-filled)

OK

Cancel

Your catalogue record will contain information to identify the content of the bundle. For example, if the bundle is a box of resources for school children on the topic of oceans, the catalogue record might look something like the one shown below.

New

Edit

Save

Add to cart

Add to list

Print

Place hold

### Oceans and Seas resource box

Subject(s): [Oceans](#) | [Marine life](#) | [Wildlife conservation](#)  
OPAC view: [Open in new window.](#)  
MARC preview: [Show](#)



Holdings (2)

Acquisition details

Images (0)

Activate filters | Select all | Clear all

Showing 1 to 2 of 2 entries Search:  Clear filter Columns Export

	Item type	Collection	Location	Status	Date last borrowed	Barcode	
<input type="checkbox"/>	 COLLECTION	Curriculum sets		Available		6767001	<div>EditManage bundle</div>
<input type="checkbox"/>	 COLLECTION	Curriculum sets		Available		6767002	<div>EditManage bundle</div>

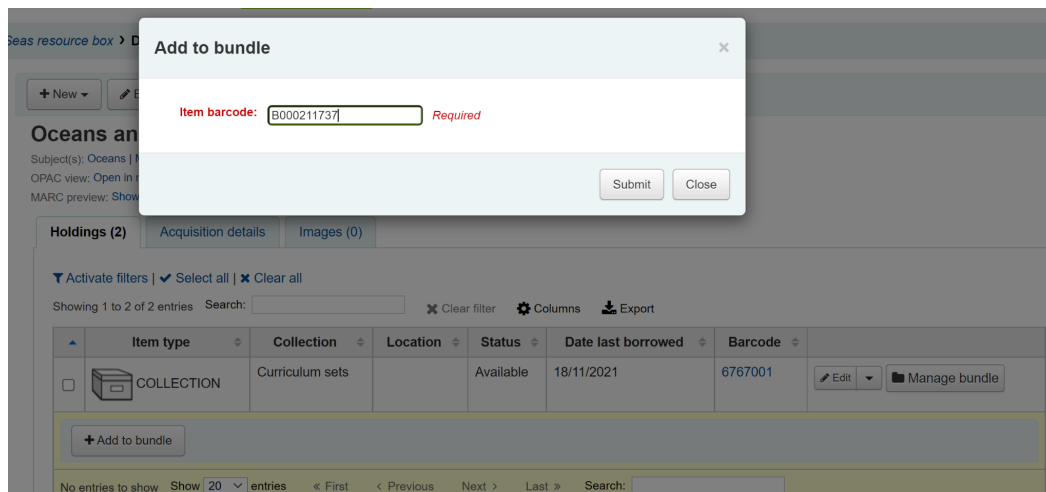
Showing 1 to 2 of 2 entries

Add an item record for each physical bundle. It is likely that you will want a specific item type for bundles so that you can identify them easily and create circulation rules for them. In this case the bundle has the item type COLLECTION.

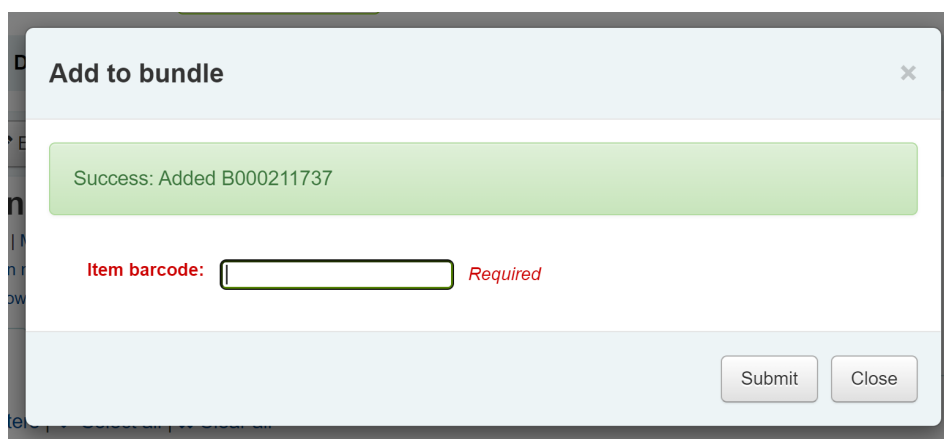
An item record attached to this type of catalogue record can be converted into a bundle via the Manage bundle button on the far right hand side of the holdings table for each item as shown below.

## Adding items to bundles

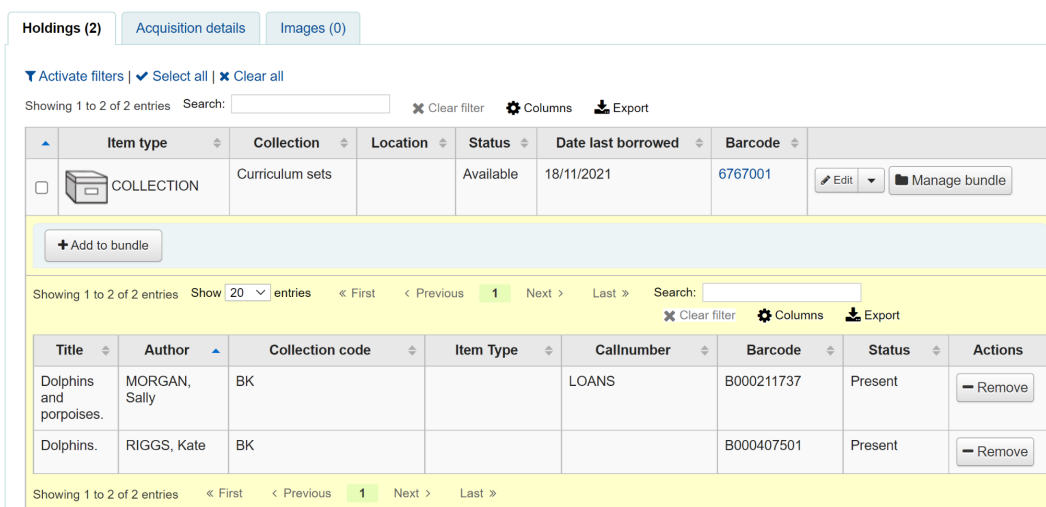
Click on Manage bundle and then the Add to bundle button to add items to the bundle using the barcode of the item.



You will see a message telling you that the item has been added successfully.



When you have finished scanning in items you can click on Close and view the bundle contents. The bundle contents list can be exported or printed if required.



Important: Items added to bundles are still attached to their permanent catalogue record, however they cannot be checked out individually. When added to a bundle an item's Not for Loan status is updated and can be viewed in the holdings table of the permanent record along with a link to the bundle. The Not for Loan status can be defined in the BundleNotLoanValue system preference.

Holdings (4) Descriptions (1) Acquisition details Images (0)							
▼ Activate filters   ✓ Select all   ✕ Clear all Showing 1 to 4 of 4 entries Search: <input type="text"/> ✕ Clear filter ⚙ Columns 📄 Export							
Item type	Collection	Location	Status	Date last borrowed	Barcode	Copy number	
<input type="checkbox"/> ITEM	Book	LOANS	Not for loan (Added to bundle) In bundle: <a href="#">Oceans and Seas resource box</a>		<a href="#">B000211737</a>	1	
<input type="checkbox"/> ITEM	Book	LOANS	Available		<a href="#">B000211738</a>	2	
<input type="checkbox"/> ITEM	Book	LOANS	Withdrawn		<a href="#">B000211739</a>	3	

If an item is already found to be attached to the bundle, a warning message will be displayed.

Add to bundle

Warning: Item 9780431003337-5 already attached

Item barcode:

Required

Submit

Close

If an item cannot be added to the bundle for any other reason a failure message will display.

Add to bundle
×

Failure: Item Z3121-1 belongs to another bundle

Item barcode:  Required

Submit Close

## Removing items from bundles

To remove an individual item from a bundle you can click on the Remove button from the Actions column of the bundle contents list.

To remove multiple items from the bundle you have two options:

Use the 'Remove from bundle' button from within the Manage bundle display

▲	Item type ▼	Collection ▼	Location ▼
<input type="checkbox"/>	COLLECTION	Curriculum sets	
<div> + Add to bundle - Remove from bundle </div>			

Scan in barcodes in the same way as you add items to bundles. You will see a confirmation dialogue to let you know the item has been removed.

Remove from bundle
×

Success: Removed B000211737

Item barcode:  Required

Submit Close

If the item couldn't be removed you will see a Failure message.

Remove from bundle

Failed: Barcode matched more than one item B0002334554

Item barcode:

B0002334554

Required

Submit

Close

The second way to remove multiple items is to scan the barcode of the item into the checkin box and you will be given the option to remove the item from its bundle.

Item belongs in bundle

This item belongs to a bundle: Oceans and Seas resource box - 6767001

Remove from bundle

Check in message

B000211737: [Dolphins and porpoises.](#)

Not checked out.

When you have finished working with a bundle you can close the contents list by clicking on the Manage bundle button again.

## Circulating bundles

### Checkout

You can checkout a bundle in the usual way from Circulation using the barcode of the bundle. If required you can create specific circulation rules for bundles based on their item type.

Remember, once an item is within a bundle it cannot be checked out individually. If you try to do this the following alert will be displayed.

Please confirm checkout

- Item is normally not for loan (Added to bundle). Check out anyway?

Yes, check out (Y)

No, don't check out (N)

*[Note: the option 'Yes, checkout (Y)' will be removed - Martin still to complete]*

*[Martin: This relies on CAN\_user\_circulate\_force\_checkout.. I would suggest that users are currently given too many permissions]*

You can see the checkout from the patron's list of checkouts.

1 Checkout(s)
0 Holds
Claim(s) 0 0
Restrictions

Number of checkouts by item type

Columns
Export

Due date	Title	Item type	Collection	Location	Checked out on	Checked out from	Location	Copy number	Renew select all   none
Today's checkouts									
27/12/2021	Oceans and Seas resource box 6767001	COLLECTION	Curriculum sets		13/12/2021 14:51	Durham Learning Resources			0 <input type="checkbox"/> (10 of 10 renewals remaining)
Totals:									Renewal due date: <input type="text"/>
									Forgive fines on return: <input type="checkbox"/>

Always show checkouts immediately ☒

Override renewal restrictions: ☐ ☒ Renew or check in selected items

You can also see that the bundle is checked out from the status column of the Holdings table of the catalogue record from the catalogue record display.

Holdings (2)
Acquisition details
Images (0)

Activate filters | Select all | Clear all

Showing 1 to 2 of 2 entries Search:  Clear filter Columns Export

	Item type	Collection	Location	Status	Date last borrowed	Barcode	
<input type="checkbox"/>	COLLECTION	Curriculum sets		Checked out to <i>Aycliffe Community School (478)</i> : due 27/12/2021 23:59	13/12/2021	6767001	Edit Manage bundle
<input type="checkbox"/>	COLLECTION	Curriculum sets		Available		6767002	Edit Manage bundle

Showing 1 to 2 of 2 entries

## Checkin

Checkin bundles in the usual way from Circulation. You will then be prompted to verify the presence of each item that belongs in the bundle.

A list of the items currently attached to the bundle, and expected to be returned, will display at the top of the dialogue. Beneath the list will be a 'Barcodes' box where you are expected to scan the barcodes of the returned items one by one.

Please confirm bundle contents for 6767001

Title	Author	Item type	Barcode
Dolphins and porpoises.	MORGAN, Sally	ITEM	B000211737
Dolphins.	RIGGS, Kate	ITEM	B000407501

**Barcodes** 1 of 3 verified

B000211737

Scan all barcodes of items found in the items bundle. If any items are missing, they will be marked as lost

Verified: B000211737

As you scan items, the matching row in the list will be highlighted to give some visual feedback. You also see a running total of items that have been checked in on the right hand side.

When you have finished scanning the returned items you can click on 'Confirm checkin and mark missing items as lost' or you can cancel the checkin.

If all the bundle items were marked as found you will be presented with a message to say the checkin is complete.

**Bundle varified**

The bundle content was varified

You can view and print a contents list.

**Bundle contents** ✕

Barcode	Title
9780431003337-5	Dolphins
B000029534	Underwater
B000407501	Dolphins.



## Missing items

If some items were found to be missing during the verification stage the check in will proceed but you will be alerted to the fact that the bundle content has changed and you will be given the option to view and print an updated contents list.

**Bundle had missing items**  
Bundle contents list updated  
[View updated contents list](#) [View list of missing items](#)

You can also view a list of the missing items.


Items missing from bundle at checking for 6767001			
Barcode	Title		
B000407501	Dolphins.		
		Close	Print

Any items that were missing during the verification stage will automatically be marked with an appropriate Lost status and a return claim added to track which checkout lost the contained item. You can add your own Lost statuses as Authorized values and can control which lost status is used via the BundleLostValue system preference. For example a 'Missing from bundle' status as shown below.

Holdings (4) | Descriptions (1) | Acquisition details | Images (0)

▼ Activate filters | ✓ Select all | ✕ Clear all

Showing 1 to 4 of 4 entries | Search:  | ✕ Clear filter | ⚙ Columns | 📄 Export

Item type	Collection	Location	Status	Date last borrowed	Barcode	Copy number	Non-public notes	
<input type="checkbox"/> ITEM	Book	LOANS	Missing from bundle Not for loan (Added to bundle) In bundle: Oceans and Seas resource box	18/11/2021	B000211737	1	<OBJ_ID>951279</OBJ_ID> ~ OLDBC: B000211737 ~ INV_NO: 1242291 ~ ORDER_NO: 101459511 ~ SOURCE: Peters Booksell	 Edit

In the Manage bundle contents view, the missing item displays with the date last seen.

	Item type	Collection	Location	Status	Date last borrowed	Barcode	<div> Edit</div> <div> Manage bundle</div>
<input type="checkbox"/>	COLLECTION	Curriculum sets		Available	18/11/2021	6767001	
<div> Add to bundle</div>							
Showing 1 to 4 of 4 entries   Show <div>20</div> entries    First    Previous <div>1</div> Next  Last   Search: <div></div> Clear filter    Columns    Export							
Title	Author	Collection code	Item Type	Callnumber	Barcode	Status	Actions
Dolphins	BUTTERWORTH, Christine & Bailey, Donna	BK		LOANS	9780431003337-5	Present	Remove
Underwater	JAMES, Diane	BK		LOANS	B000029534	Present	Remove
Dolphins and porpoises.	MORGAN, Sally	BK		LOANS	B000211737	Last seen: 2021-11-18	Remove
Dolphins.	RIGGS, Kate	BK			B000407501	Present	Remove
Showing 1 to 4 of 4 entries    First    Previous <div>1</div> Next  Last							

## Claims returned process

Within the patron record the missing items are listed as claims returned and can be viewed from the Claim(s) tab in the Checkouts table.

0 Checkout(s)
0 Holds
Claim(s) 0 1
Restrictions

Patron has nothing checked out.

Click on the numbered square to view the missing items for the patron.

If an item is found it should be checked in. The checkin dialogue box will include a button to 'Resolve' the claim.

This item has been claimed as returned by:

- Aycliffe Community School (478) ☒ Resolve

You are required to add a resolution reason and can optionally change the lost value of the item.

Resolve return claim

Resolution

Returned by patron

New item lost value:

(Not lost) (current status)

Resolve claim

Cancel

## Inventory (checking bundle contents at any time)

A verification can be triggered at any time by checking the bundle in. If the system detects that the bundle was not checked out at this point, a modified confirmation dialogue is displayed which will include all items expected to be present in the bundle, even those currently marked as lost.

Please confirm bundle contents

Title	Author	Item type	Barcode	Status
Dolphins	BUTTERWORTH, Christine & Bailey, Donna	ITEM	9780431003337-5	Present
Underwater	JAMES, Diane	ITEM	B000029534	Missing from bundle
Dolphins and porpoises.	MORGAN, Sally	ITEM	B000211737	Present
Dolphins.	RIGGS, Kate	ITEM	B000407501	Present

Barcodes

Optionally scan all barcodes of items found in the items bundle to perform an inventory check. If any items are missing, they will be marked as lost

Confirm inventory check and mark items as lost

Cancel

This allows for a quick view of what should be in the bundle and what's currently marked as missing. You can optionally cancel the checkin or choose to rescan the items to perform the verification, marking items as found or subsequently missing. As this is a checkin that is not associated with a checkout, if new items are found to be missing, we will mark them as lost but cannot associate them with a checkout and returns claim.