How do I renew all items on loan to a group of users with minimum checks?

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Applies to

- OLIB 9.0

Answer

All items on loan can be renewed for a group of users with minimum checks using the Renew all items on loan action from the users domain. The maximum number of users that should be selected is 50.

Warning: In using this procedure, you will only be given one opportunity to over-ride the renewal of loans for selected users.

Once the over-ride is selected, all loans will be renewed for all users in the group - including those where the item has been reserved or the user has been banned or membership has expired.

Do not follow this procedure if you wish to make individual decisions for each user on whether to over-ride checks.

1. Check all Renew all copies on loan action is available in the users domain:

   - Go to Admin Client Configuration> Method Permissions.
   - Use the search Domain Methods Name Search and search for renew.
   - Go to the details screen for the record: Renew all copies on loan Domain name: users
   - Select the Advanced option on the Permissions drop-down list.
   - Ensure relevant member of staff has permission to view domain method e.g. System Administrator, Library Manager.
   - Save

2. Select group of users who have items on loan

   - In OLIBWeb, Go to Searches - Users
   - In search box, enter %
   - Click on Refine Search - Linked Domains - Copies
   - Select loan status
   - Click on On loan

https://help.oclc.org/Library_Management/OLIB/Troubleshooting/How_do_I_renew_all_items_on_loan_to_a_grou…
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This search will retrieve all users that have at least one copy on loan.

Alternatively, users can be selected where at least one copy is overdue or long overdue by refining on copy status and then selecting 'Overdue' or 'Long Overdue'. However, it should be remembered that all loans will be renewed, not just those that are overdue.

3. Renew items on loan for selected users

- If less than 50 users have been selected, click on Select all. A tick will appear against each user.
- If more than 50 users have been selected, pull-down on Results per page box and select 50. Click on Select current page. A tick will appear against each user to be processed.
- Pull-down Other Actions box and select Renew all copies on loan.
- A single 'alert' will be displayed giving a warning of any items that would not be renewed due to checks e.g. reservation for item, user's expiry date has been reached, user is banned.
- Select Yes if you wish to over-ride all of these warnings for all users selected.
- The items will be renewed for the period specified in the current loan terms.
- Repeat action for remaining pages of users if necessary.

Note: This procedure will renew all items that are on loan to selected users. The length of loan (fixed or number of days) will be taken from the loan terms. If you wish to change the length of loan for the renewals, then the loan terms will be needed to be amended prior to using this action.

4. Extend renewals using automatic renewals

If you wish to continue to renew items after performing this action, then it is advised that automatic renewals are set up. For further information, see OLIB Service Pack 12 Release Notes - Automatic renewals

Additional information

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