Learn how to configure loans to auto renew when they reach the due date in OLIB.

About auto-renewals

OLIB can be configured so that it automatically renews loans on the due back date, rather than setting them to overdue.

This can be done at various levels:

• OLIB Defaults
• Copies
• Users
• Loan Terms
• User Categories

In these domains, you can enter a value indicating the maximum number of times an item can be renewed. It is a 3-digit numeric field, so the maximum value that it can be set to is 999.

First, in Layout Manager, the attribute **Max. Auto. Renewals** would need to be added (except for OLIB Defaults, where it is already included in Circulation Defaults):

An auto-renew process is run in daystart, immediately prior to the process that generates overdue notices.

• For each item that is due back “today”, the auto-renew process checks whether it can be renewed automatically. It does this by first checking the copy’s Max. Auto Renewals field. If this is set to 0, the item will not be automatically renewed, and the process will move on to the next item.
• If the copy’s Max. Auto Renewals field is set to a number and the item has not already been auto-renewed this number of times, the item will be auto-renewed.
• If the copy’s Max. Auto Renewals is set to a number and the item has already been auto-renewed this number of times, the item will not be automatically renewed, and the process will move on to the next item.
• If the Max. Auto Renewals field on the Copies layout is blank, the process will look at the Max. Auto Renewals field in order on the following layouts and perform the same processing:

- User layout
- Loan terms record
- User category record
- OLIB Defaults record

Therefore auto-renewals can be enabled system-wide simply by setting Max. Auto Renewals in OLIB Defaults to a number such as 5. This would mean that every on loan item will be automatically renewed 5 times before it finally moves
on to overdue. Setting Max. Auto Renewals to a value at a lower level, e.g. in the loan terms records, will override the system-level setting.

Similarly, auto-renewals can be disabled system-wide by setting Max. Auto Renewals in OLIB Defaults to 0 (or leaving it blank, as the default is 0 if this field is left blank), and then setting Max. Auto Renewals at a lower level, e.g. in the Senior Staff user category, will enable it just for users with that user category.)

An item is not eligible for Automatic Renewal if an active reservation exists on the item.

If an item is renewed automatically, an entry is added to the copy and user transaction histories with Automatic Renewal as the transaction type.

When an item is returned, the copy’s Auto. Renewal Count field is re-set to 0.

**Auto renewal count in copies**

An **Auto. Renewal Count** field is available in Copies, to maintain a count of automatic renewals separately from seen and unseen renewals.

You will need to use Layout Manager to add this attribute to your Copies layouts if required.

**Circ desk screen**

If you want to include the Auto Renewal count and the Max Auto Renewals value in the Renewal Information message in the Loan Items field on the Issues/Returns/Renewals screen, you will need to edit the **Main Renew Trans Message** field.

1. Go to System Administration> OLIB Defaults.
2. Open the User/Circ sheet in modify mode.
3. In **Main Renew Trans Message** add the string *9* and *10*, together with accompanying text and punctuation to this field.

For example:

*1* reservations ; *2* renewals (*3* allowed) ; *4* unseen (*5* allowed) ; *6* total (*7* allowed)

Here the string *9* auto (*10* allowed) has been added:

*1* reservations ; *2* renewals (*3* allowed) ; *4* unseen (*5* allowed) ; *9* auto (*10* allowed) ; *6* total (*7* allowed)