

AFO 413 – Renewals

413.1 Introduction

Using AFO 413, the loan period for items that have been on loan can be renewed. In other words, a borrower can keep an item longer than the original due date.

You can renew items that are on loan to a borrower. Parameters (in AFO 481) determine:

- the default renewal period. This is often the same as the default loan period.
- whether items that belong to another location can be renewed
- whether you can renew an item that is overdue
- how many times an item can be renewed
- the maximum loan period for an item including renewals
- whether you can renew items that were loaned on the same day you are trying to renew them
- whether you can implicitly renew items that are already on loan in AFO 411 Loans

In AFO 413, standard and non-standard renewals can be performed. The differences are explained in the table below.

Difference	Standard renewal	Non-standard renewal
Due date	the 'new' due date is calculated based on the date upon which the renewal is registered	the 'new' due date is calculated based on the 'old' due date.
Period of renewal	fixed period that is either the same as the loan period or a different period	can be freely determined

Parameters (e.g. maximum number of renewals per item and/or per borrower, maximum loan period, et cetera)	the system applies the parameters as you have defined	no parameter affects the renewal
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If an administrative fee is to be charged for the renewal, you must use AFO 419 'Renewal (with administrative fee)'. This fee is applied per renewal irrespective of the number of items renewed. Administrative fees are defined in AFO 481 ('Loan parameter control: general'). The manner in which the screens of the two AFOs work is identical.

Note

Renewed materials cannot be renewed again on the same day they were already renewed.

413.2 Renewals (from borrower)

After choosing this option the following form will be displayed:

Select a borrower here. Enter a borrower barcode or part of the borrower's name. If you select a borrower using the borrower barcode, the overview screen for this AFO will be displayed. If you select a borrower by name, a list with borrowers will almost always be displayed. Select a borrower from this list. Then the overview screen for this AFO will be displayed. See the Help for AFO 431 for all options to identify a borrower.

After identifying the borrower the system will display an overview screen with existing loans:

The screenshot shows the V-smart library system interface. The header pane displays the following borrower details:

Name	Baartmans, JLM
Address	's-Hertogenbosch - 5216 BM
Barcode	00000844
Borrower category	EPA (External users Private Persons)
Reservations available	0
Number of renewals	0
Number of items on loan	1

Below the header is a table of items on loan:

No	Item	Cat	Title	Loc	Borrowed	R	Due date
1	2010115 BO		Star Crusader : A Novel / Bruce Balfour / Carter, Lin	BD	18/08/2010 14:48	0	12/09/2010

The **Header pane** shows summary details for the borrower.

The **Columns** show the item barcode, item category and title of the items on loan to the borrower, the location of the item, when it was borrowed and the current due date, and how many times it has been renewed.

Options on the screen

Standard renewal of 1 or more items (+): This option allows you to renew one or several selected items.

Renew linked: Use this option to renew the items for related borrowers. See section 413.2.5 for more information.

Standard renewal of all items: This option allows you to renew all the items on loan. The items will be renewed in the same way as for single items.

Loan fee history for loan fee counter: This is similar to the **List items on loan** option (see AFO 411/412), but will only list those items loaned under the Loan fee counter functionality.

Non-standard renewal of 1 or more items (+): Select one or more items to perform a non-standard renewal on the items selected.

Non-standard renewal of all items Select this option to perform a standard renewal for all items.

Stop + renew nothing (undo): Select this option to cancel all renewals entered during this renewal session. Once you have selected this option, the system will automatically modify the fields 'Renewals' and 'Due date' for the relevant items.

Undo renewal of 1 or more items: Select this option to cancel one or more selected renewals entered during this session. Once you have selected this option, the system will automatically modify the fields 'Renewals' and 'Due date' for the relevant items.

Cumulative loan slip: print a cumulative loan slip for these loans and items the borrower already has on loan.

Details (+):Select an item and use this option to view more information about this loan. After selecting this option, an information screen will be displayed with the following information: item barcode, complete bibliographic description, call number, the dates upon which the selected borrower was sent reminders for the relevant item.

Bib data: The bibliographic record of the selected item will be displayed in read-only mode.

Switch to item information: The system displays the [Item detail](#) screen. This shows the full item record. See the Help for AFO 423 for more information.

Note

The renewal transaction is NOT committed to disk when you switch to AFO 423. When leaving the 423 overview screen the system automatically returns to the 413 overview screen.

Loan plan history: this option goes with the Loan Plan functionality. See section 413.6 for more information.

Modify deposits: This option is only relevant if your system uses the deposits functionality. See the Help for AFO 417 and 431 for more information.

Modify status: Select an item and use this option to modify the loan status. This can be used to set items to 'claimed returned', 'missing' etc. See section 413.2.4.

413.2.1 Standard renewal

This option allows you to renew one or several selected items.

- Select an item
- Click the **Standard renewal of 1 item** icon.

The item will be renewed if allowed. The **Due date** column will now show the new date and the number of renewals in the **R** column will be incremented by 1.

- Press **Enter**, **Esc** or the **Back** icon to start a renewal for another borrower

If any payments are due you may be transferred automatically to the **Accept payments** screen.

You can select more than one item to renew.

413.2.2 Non-standard renewal

Non standard renewal ignores the standard parameters for renewal and allows you to determine the new due date. It also allows you to override messages which would otherwise prevent you from renewing e.g. maximum number of renewals reached (see below).

- Non standard renewal of one item

When you select this option an input screen is displayed:

The screenshot shows a window titled "V-smart [1.0.01]". Inside the window, there is a light green background. At the top left, there is a calendar icon showing the number "31". At the top right, there is a small icon of a person with a checkmark. The main area contains two input options: "Renew for a number of days" with an empty text box, and "or Renew until date" with a text box containing "20/05/2008" and a calendar icon. Below these is a "Save settings" checkbox. On the right side, there is a vertical stack of three buttons: "OK", "Cancel", and "Help".

You can extend the loan period for a specified number of days or you can specify the date on which the item should be returned.

Renew for a number of days: Enter a number here and the system will reset the due date to the current date+ the number of days entered. Enter a number here prefixed by a + or – sign, and the system will calculate the new due date as the original due date plus (or minus) the number of days specified.

Examples

The following examples show a number of items borrowed on 21/10/2009 and renewed on 22/10/2009:

No	Item	Cat	Title	Loc	Borrowed	R	Due date
<input type="checkbox"/>	1	399992111	BO	Beyond the Farthest Star [Book] / Auteur, A. #	BD	21/10/2009 13:50	0 18/11/2009
<input type="checkbox"/>	2	99008804	BO	Star Trek and more : [The Original Series] / William Shatner, Leonard Nimoy; Mark Lenard; Deforest	BD	21/10/2009 13:50	0 18/11/2009
<input type="checkbox"/>	3	3999416	BO	Star child / James P Hogan / Hogan, James P.	BD	21/10/2009 13:50	0 18/11/2009

- Select the first line and enter **3** in the **Renew for a number of days** field.

The new due date is "today" plus 3 days.

<input type="checkbox"/>	1	399992111	BO	Beyond the Farthest Star [Book] / Auteur, A. #	BD	21/10/2009 13:50	1 25/10/2009
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You can specify a number preceded by a plus (+) or minus (-) sign, to add or subtract that number from the original due date.

- Select the second line and enter **+3** in the **Renew for a number of days** field.

<input checked="" type="checkbox"/>	2	99008804 BO	Star Trek and more : [The Original Series] / William Shatner; Leonard Nimoy; Mark Lenard; Deforest	BD	21/10/2009 13:50	0	18/11/2009
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V-smart [2.0.01] -- Webpage Dialog							18/11/2009
							22/10/2009
							22/10/2009

Renew for a number of days	<input type="text" value="+3"/>	<input type="button" value="OK"/> <input type="button" value="Cancel"/> <input type="button" value="Help"/>
or	Renew until date <input type="text" value="22/10/2009"/>	

The new due date is the original due date plus 3.

<input type="checkbox"/>	2	99008804 BO	Star Trek and more : [The Original Series] / William Shatner; Leonard Nimoy; Mark Lenard; Deforest	BD	21/10/2009 13:50	1	21/11/2009
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- Select the third line and enter **-3** in the **Renew for a number of days** field.

<input checked="" type="checkbox"/>	3	3999416 BO	Star child / James P Hogan / Hogan, James P.	BD	21/10/2009 13:50	0	18/11/2009
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V-smart [2.0.01] -- Webpage Dialog							2/10/2009
							2/10/2009

Renew for a number of days	<input type="text" value="-3"/>	<input type="button" value="OK"/> <input type="button" value="Cancel"/> <input type="button" value="Help"/>
or	Renew until date <input type="text" value="22/10/2009"/>	

The new due date is the original due date minus 3.

<input type="checkbox"/>	3	3999416 BO	Star child / James P Hogan / Hogan, James P.	BD	21/10/2009 13:50	1	15/11/2009
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Notes

You cannot make the item due back any earlier than today. If you enter a negative number that would take the item to a due date before today it will be renewed to today.

A non standard renewal does *not* take into account parameters related to renewals (such as total number of renewals, total maximum loan period, etc.). I.e. a non-standard renewal is *always* allowed.

Renew until date: Specify the actual date the item will be due.

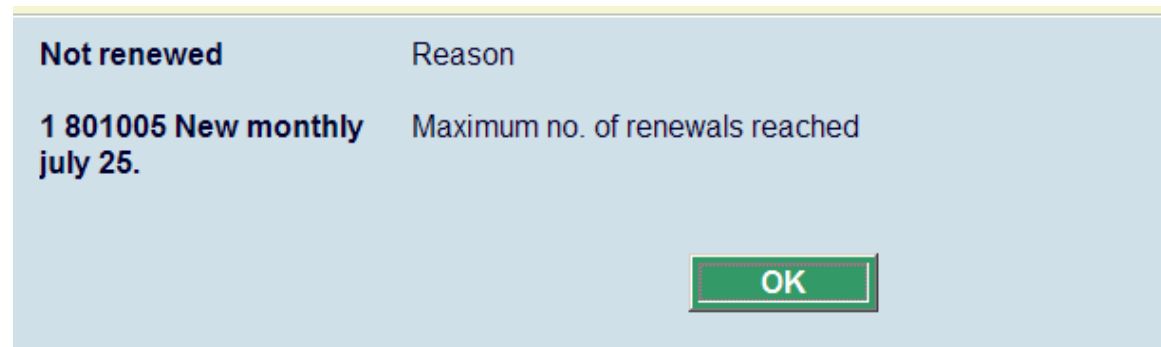
- Non standard renewal of all items

When you select this option the renewal is done for all the items on loan to the borrower.

413.2.3 Override maximum number of renewals

Authorised staff can override the maximum number of renewals and the maximum loan period when doing a non-standard renewal of one item.

When an item has been renewed for the maximum number of times, or when the maximum loan period has been reached, standard renewal of the item produces the following warning message:



- Acknowledge the message by clicking **OK**.
- Select the item and click the **Non standard renewal of one item** icon on the toolbar.


The following form is displayed:

V-smart [1.0.01]

31

Renew for a number of days

or

Renew until date 

Save settings

OK

Cancel

Help

Renew for a number of days: enter the number of days by which to extend the loan.


Renew until date: select a date using the calendar which displays from the drop-down box.

- Click **OK**.

The system displays the **Override renewal limit** form:

V-smart [1.0.01]

31 **Override renewal limit**

 Item 200700014 has been renewed for the maximum loan period.

You can override this block by entering a valid override password

Override password

OK

Cancel

Help

- Enter a valid override password.
- Click **OK**.

If no valid password is entered, or you click the **Cancel** button then the system returns to the **Renewals** screen without the renewal having taken place.

A similar form is displayed if the maximum loan period is reached. If both blocks are applied then both messages are displayed in separate windows.

413.2.3 Finished renewals for this borrower

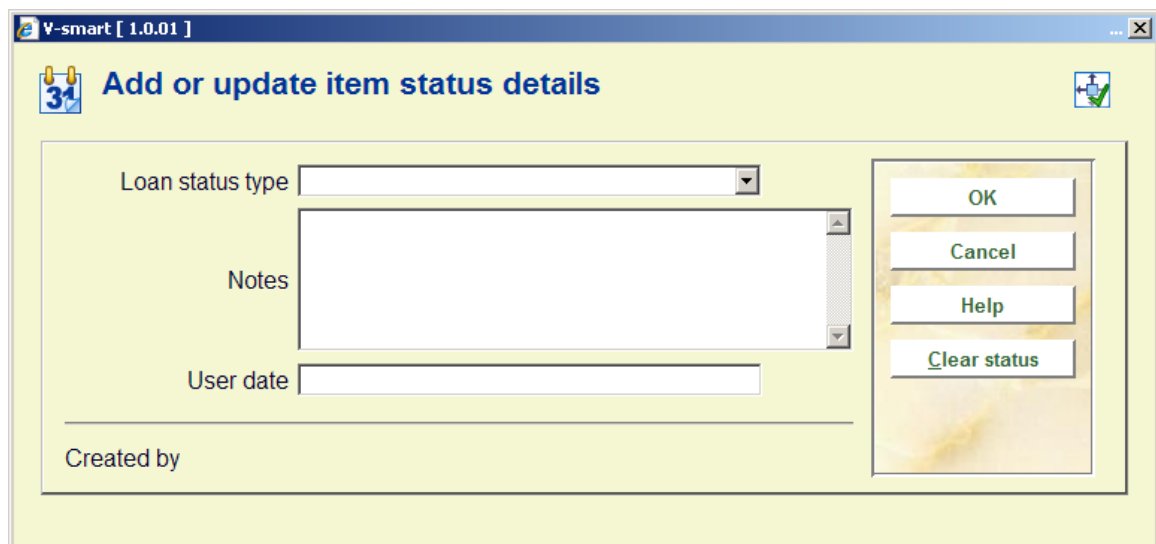
Once you have finished renewing you can click on the **Back** button to commit the transactions to disk.

Once you have done this, one of the following screens will be presented:

- *the start screen of this AFO*: you can continue renewing items for another borrower or you can click the **Cancel** button to go to the main menu;
- *a list of borrowers*: you can select another borrower or you can click the **Back** button to the start screen of this AFO;
- *the screen 'Accept payments'*: This screen is only offered when the borrower has an outstanding debt AND the relevant parameter to display this screen is set on your system. See the Help for AFO 414 ('Accept payments') for more information.

413.2.4 Modify loan status

Modify status: Select an item and use this option to modify the loan status. This can be used to set items to 'claimed returned', 'missing' etc. After choosing this option an input form will be displayed:



The screenshot shows a software window titled "V-smart [1.0.01]" with a sub-header "Add or update item status details". The form contains the following elements:

- Loan status type**: A dropdown menu.
- Notes**: A large text area for entering details.
- User date**: A text input field.
- Created by**: A text input field at the bottom left.
- Buttons**: A vertical stack of buttons on the right side: "OK", "Cancel", "Help", and "Clear status".

If the item was already set to some special status, then the form will be shown with the current values completed, and may be used to update or change the status.

Fields on the screen

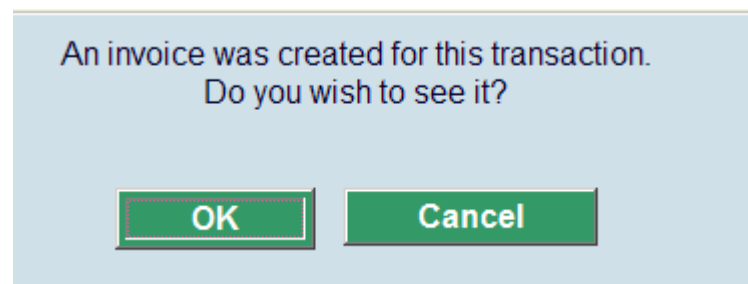
Loan status type: choose a type from the dropdown list. Different types result in different behaviour of the system. See the Help on AFO 481 – Main circulation parameters – Loan status code settings for more information.

Notes: Optionally add comments. It is also possible to simply add a note to the item, by leaving the loan status empty.

User date: Optionally you can enter the date on which the user claims he/she already returned the item.

A previous status may be removed by using the “**clear status**” button or by clearing the data fields on the input form.

If the Loan Status has been configured to cause an invoice to be generated, then the system offers takes the user to the Quick invoice screen.



See the Help on AFO 495 for more information on processing invoices.

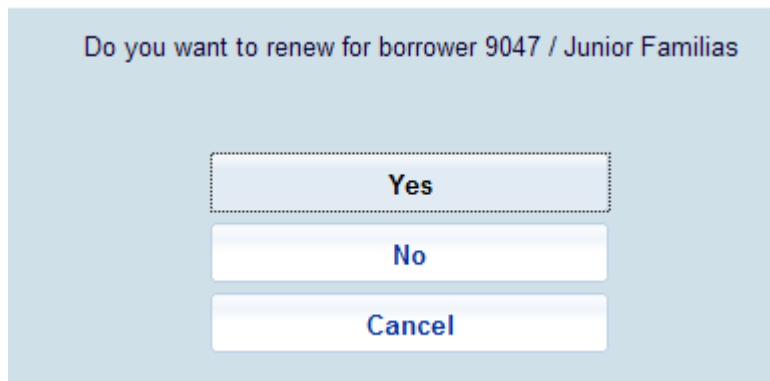
If a loan transaction HAS a note or a loan status applied, then the Icon specified in the settings (AFO 481) will be displayed against the loan. If no icon is explicitly defined, or the status is only a note, then a blue letter I icon is displayed by default. The Yellow triangle is displayed when the loan is at its penultimate renewal, and therefore reserved for this use.

413.2.5 Renew for linked borrowers

It is possible to renew items of borrowers linked to the current borrower record. The flag for this must be set in AFO 431, when creating the link between borrower records. See the help of this AFO for more information.

If there are no linked borrowers or if the "renew linked" flag has not been set, this option will not be active.

When the option is active you can use it to renew the items for related borrowers. For each linked borrower with the 'renew flag' set, the system asks the question,



Do you want to renew for borrower 9047 / Junior Familias

Yes

No

Cancel

Click on **Yes** when you want to renew this borrower's items. The system will first check if this borrower is blocked (you may need to provide an override password to continue with the renewals process). The system will also check if the borrower record can be locked (i.e. someone else in the system may already be accessing this borrower record). Once you have gained access to the borrower record, the system displays any items waiting to be picked up, etc and then displays the borrower's Renewals screen. Renew this borrowers items and then back out of the Renewals screen. The system will then prompt for the next linked borrower.

Click on **No** if you do not want to renew this borrower's items. The system will then prompt for the next borrower in the list.

Click on **Cancel** to stop prompting through the linked borrowers and return to the main menu.


Note

When using this method of renewal, any circulation notes or borrower category messages for the related borrowers are suppressed.

If renewal fees are applicable for renewed items the payment screen will be offered for each borrower.

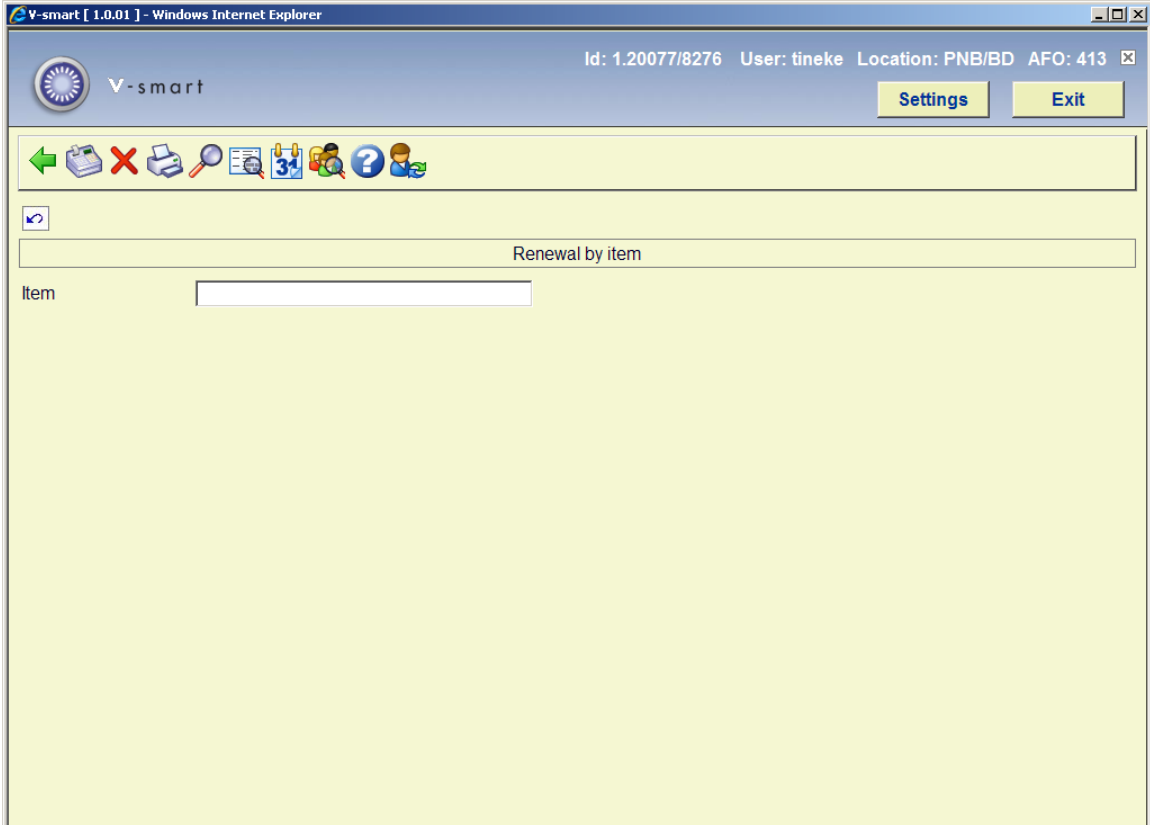
413.3 Renewal by item

After choosing this option the following form will be displayed:

 **Identify a borrower**

Borrower name/barcode

Click on the button **Renew by item** to display the following screen:



v-smart [1.0.01] - Windows Internet Explorer

Id: 1.20077/8276 User: tineke Location: PNB/BD AFO: 413

v-smart Settings Exit

Renewal by item

Item

You can now enter the barcode of the item to be renewed. If you enter a barcode of an item that is not on loan, the following message is displayed:

Renewal Item not found.

Options on the screen

Accept payments: When you lend an item that incurs charges this is indicated in the **Loan fee** column of the **Loans** screen. You can pay the charge by clicking this icon on the toolbar. See the Help for AFO 414 for more information.

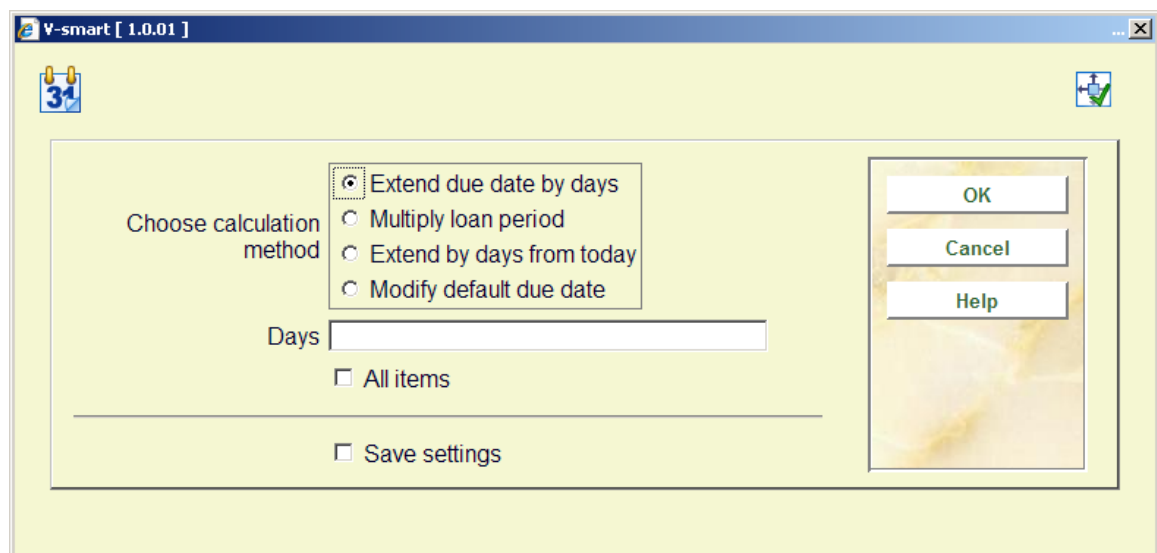
Delete transaction no.: Select this option to cancel one or more selected renewals entered during this session. Once you have selected this option, the system will automatically modify the fields 'Renewals' and 'Due date' for the relevant items..

Cumulative loan slip: print a cumulative loan slip for these loans and items the borrower already has on loan.

Details (+):Select an item and use this option to view more information about this loan. After selecting this option, an information screen will be displayed with the following information: item barcode, complete bibliographic description, call number, the dates upon which the selected borrower was sent reminders for the relevant item.

Bib data: The bibliographic record of the selected item will be displayed in read-only mode.

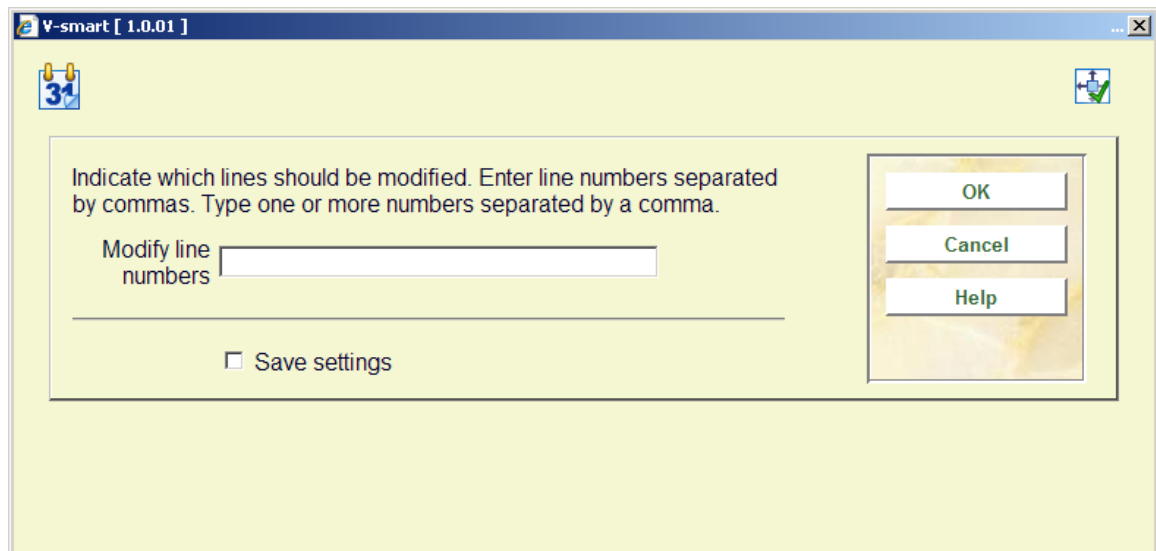
Modify due date: You can change the due date by clicking the **Modify due date** icon on the toolbar. Choose a method to recalculate the due date from the following form:



The screenshot shows a dialog box titled "V-smart [1.0.01]" with a yellow background. On the left, there is a calendar icon showing the date "31". The main area contains a "Choose calculation method" section with four radio button options: "Extend due date by days" (selected), "Multiply loan period", "Extend by days from today", and "Modify default due date". Below this is a "Days" text input field. At the bottom left, there are two checkboxes: "All items" and "Save settings". On the right side, there is a vertical stack of three buttons: "OK", "Cancel", and "Help".

Choose how the renewal must be **Calculated** . Under **Days** put in a value. For example, when you choose **Extend due date by days** you must enter the number of days; when you choose **Modify default due date**, you must enter a date.

After making your choice and clicking **OK** this question is asked:



Enter the line numbers to which the renewal should be applied and click **OK**.

Switch to renewal by borrower: select a line on the screen (by clicking on the grey square in the left hand column) and then click this button to switch to the standard 413 screen, where the item will show as having been renewed already.

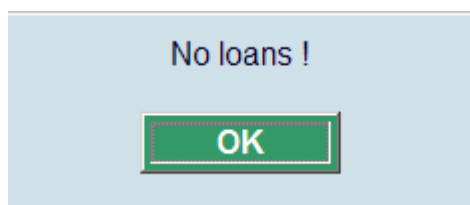
413.4 Miscellaneous

It is possible to renew an item that is reserved for another borrower with an override option. When you use the override option, a default (shorter) renewal period is applied. You can change this renewal period. The default renewal period applied is set by a parameter in AFO 4181 – Main Circulation Parameters – Loan Policies.

413.5 Renewal messages

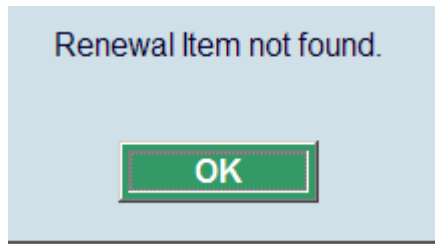
- No loans

If the borrower has no items on loan a message is displayed:



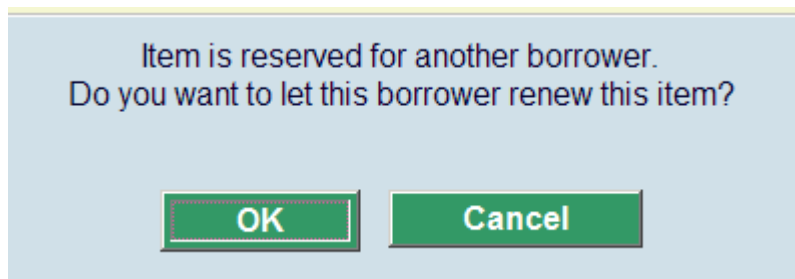
- Item not on loan

In item renewal if an item is not on loan the following message is displayed:



- Reserved items

A message will be displayed if you try to renew an item that is reserved for another borrower.



If you do not have permission to renew reserved items a message is displayed.

- Reduced renewal period

In the loan policies (AFO 481 – Loan policies – Loan polict peridos), you can specify reduced renewal periods for materials that are reserved and/or for which the ratio of reservations to circulation copies has been exceeded. There is *NO* warning message that such a reduced renewal period is being applied.

- Charges

If an item incurs a loan fee and/or fine at time of renewal, a message will be displayed:

Renewed	Details
1 00000367 Vulcan's glory	Renewed fine: 10.00 loan fee: 0.75

- Special status

A special loan status may have been applied to the item since it was loaned:

This item is NOT on loan, but has been reported: Discard on 18/08/2010

Do you want to remove this status and proceed?

- Cannot renew

If an item cannot be renewed an error message is displayed with the reason for refusing the renewal. Some examples are shown below:

Not renewed	Reason
1 801005 New monthly july 25.	Maximum no. of renewals reached

Not renewed	Reason
1 200700014 A book about computers	Maximum loan period exceeded

OK

Not renewed	Reason
1 801005 New monthly july 25.	Item lent today

OK

Not renewed	Reason
1 !!R0000143:2010 We are the champions	This is an interlibrary loan - it may not be renewed in this way

OK

413.6 Loan Plan

See also the general information on [Loan Plan](#).

When a borrower has a Loan Plan type subscription, the corresponding counters are shown in the protected upper part of the renewals screen:

This screen is for information purposes only.

- **Document control - Change History**

Version	Date	Change description	Author
1.0	May 2008	creation	
2.0	October 2009	new Loan Fee option; textual improvements; more on non-standard renewal part of 2.0 updates	
3.0	August 2010	reduced loan period for reservation ratio exceeded; renewal for linked borrowers ; Interlibrary Loan message part of 2.0.06 updates	