



### 3.5.2.1 WorkFlows Upgrade and Renewals

SWAN recently implemented auto-renewals, and we upgraded WorkFlows to 3.5.2.1. With that upgrade came some changes to Circulation Rules **that are separate from the auto-renewal reports. Even if your library opted out of auto-renewals, these changes will affect you.**

New facts about renewals since the upgrade to 3.5.2.1

- Items now renew from the due date – not the date of the renewal
- Patrons can only attempt to renew an item online (through the Enterprise catalog) beginning 3 days before the due date
- Staff can renew an item in WorkFlows as “seen” anytime
- Staff can only renew an item in Workflows as “unseen” within 3 days of its due date

For a more thorough explanation, please review the following documentation.

Circulation Rules now renew from the due date, not from the date of renewal. There is also an important distinction between *seen* and *unseen renewals*. In WorkFlows, renewals can be marked “seen” or “unseen”. “Seen” renewals are allowed if the Circulation Rule allows them. “Unseen” renewals are not allowed until 3 full days before the due date.

If renewals are marked “seen”, renewals will be allowed if the Circulation Rule allows them, but **items will renew from the original due date**, not the date of renewal. If the items are overdue, they will renew from the date of renewal and not the due date.

If renewals are marked “unseen”, staff will see a message stating that renewals are not allowed until 3 days before the due date.

#### ***What does this mean for my patrons?***

In Enterprise, all renewals are automatically marked “unseen”. Because “unseen” renewals are not allowed until 3 full days before the due date, Enterprise users will see a message stating that fact. This message cannot be overridden.

Cannot renew item at this time. This item will be available for renewal after: 7/3/2017,23:59

#### ***What does this mean for staff?***

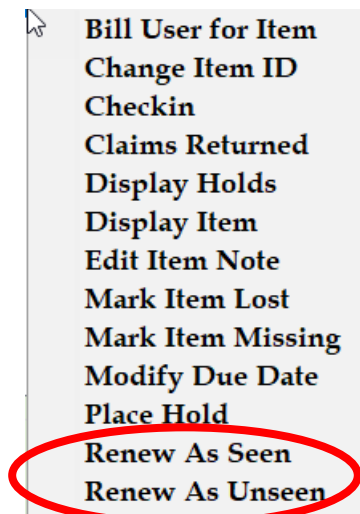
As stated previously, in WorkFlows renewals can be marked either “seen” or “unseen”. If you use the Renew by User or Renew by Item wizards, renewals will default to “seen”. Leaving the default as “seen” will allow you to renew the item.

The screenshot shows the 'Renew by User' wizard. It includes a 'User Information' section with fields for Name, Profile name, User categories, Group ID, Status, Amount owed, and Overdues. Below this is an 'Identify User' section with a 'User ID' input field. At the bottom, there is a section for 'Current user checkouts' and 'Items eligible for renewal' with checkboxes for 'Select All' and 'Select all seen'.

The screenshot shows the 'Renew by Item' wizard. It features an 'Identify item' section with an 'Item ID' input field. Below this is a checkbox labeled 'Mark Item as Seen' which is checked.

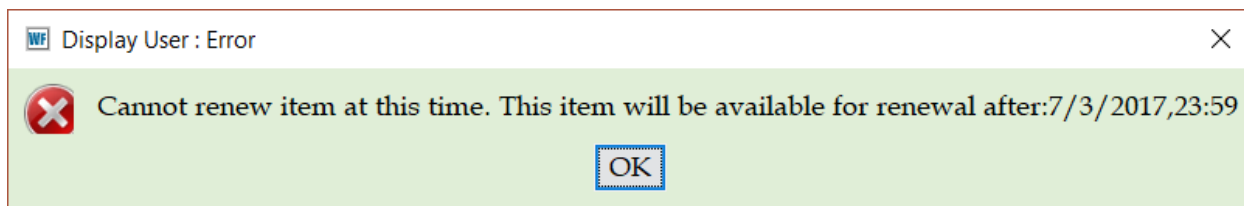


If you use right-click menus, staff, as always, must select either “seen” or “unseen” when renewing.



If marked “seen”, items will renew if the Circulation Rule allows them without the need for an override. **If items are not overdue, renewal dates will be from the due date, not from the date of renewal.**

If marked “unseen”, staff will see a message stating that renewals are not allowed until 3 full days before the due date. This message cannot be overridden.



If you see the “override required to exceed renewal limit” at any time, this means that the Circulation Rule does not allow additional renewals. Only override if it is your item or you have permission from the library that owns the item.

