

Loan and Renewal Configuration for the SCF IZ

Auto Renewal Rules

The following automatic loan renewal rules are configured in the SCF IZ. These rules can be found under

Configuration > Fulfillment > Physical Fulfillment > Auto Loan Renewal Rules

Items checked out by Library User Accounts

This rule automatically renews all items checked out by accounts with a User Group of 'Library pickup locations'. These specific loans represent the pickup location of the item, and are not the primary loan (the primary loan being the loan of the book by the patron). For this reason, they are automatically renewed.

Input Parameters

- Name : User Group
- Operator : In List
- Value : Library pickup locations

Output Parameters

- Autorenewal : TRUE

Items checked out by ILL Accounts

This rule automatically renews all items if they are checked out by user accounts with a user statistical category Account Type = Interlibrary Loan Account. Patron accounts that represent ILL departments are automatically given a 'wrlc user' group code by the Remote Storage app, but they should be treated like user accounts representing Libraries (accounts with a user group of 'Library pickup location'), rather than user accounts representing individual patrons. These specific loans represent the pickup location of the item (in this case, the ILL department), and are not the primary loan (the primary loan being the loan of the book by the patron). For this reason, they are automatically renewed.

Input Parameters

- Name : User Statistical Category
- Operator : =
- Value : Account Type - Interlibrary Loan Account

Output Parameters

- Autorenewal : TRUE

Overdue and Lost Loan Profiles

The following overdue and lost loan profiles are configured in the SCF IZ. These rules can be found under

Configuration > Fulfillment > Physical Fulfillment > Overdue and Lost Loan Profiles

The following automatic loan renewal rules are configured in the SCF IZ. These rules can be found under

WRLC Lost Loan Profile for 'wrlc shrm' items

This profile marks all wrlc shrm loaned items (items checked out by Trinity patrons or with user group of 'wrlc user') as Lost when overdue by 39 days, according to RSC policy. Because items in this location are owned by WRLC, these are the only items in the SCF IZ that are loaned directly to patrons (and not to patron accounts representing Libraries or ILL departments). Therefore, these items need to follow Consortium Loan Service rules.

- Profile Type : Change to Lost
- Days after Due Date : 39 Days
- User Group :
 - Trinity Staff
 - Trinity Student
 - Trinity Faculty
 - WRLC HQ Staff
 - wrlc user
- Locations : WRLC Shared Monograph (wrlc shrm)
- Letter send format : Mail*

* The **Ful Overdue And Lost Loan Letter** is sent by this profile when the **Loans - Overdue and Lost Loan Job** is run. The Ful Lost Loan Letter is sent when an item is manually changed to Lost.

WRLC Overdue Notice Profile for 'wrlc shrm' items

This profile emails overdue notices for wrlc shrm loaned items (items checked out by Trinity patrons or with user group of 'wrlc user') when overdue by 7 days. Because items in this location are owned by WRLC, these are the only items in the SCF IZ that are loaned directly to patrons (and not to patron accounts representing Libraries or ILL departments). Therefore, these items need to follow Consortium Loan Service rules.

- Profile Type : Overdue notification type 1
- Send notification : checkmarked
- Days after Due Date : 7 Days
- Loan Status :
 - Auto renewal
 - Loan
 - Renew request handled by library staff
 - Normal
 - Overdue Notification
 - Recalled
 - Renewed
 - Renew rejected by partner
 - Renew requested
 - Workbench change forward
- User Group :
 - Trinity Staff
 - Trinity Student
 - Trinity Faculty
 - WRLC HQ Staff
 - wrlc user
- Locations : WRLC Shared Monograph (wrlc shrm)
- Letter send format : Mail*
- The **Ful Overdue and Lost Loan Notification Letter** is sent by this profile when the **Loans - Overdue and Lost Loan Job** is run.

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