

## Renewing Items Cheat Sheet

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There are several methods to renew items in WorkFlows using the Circulation module.

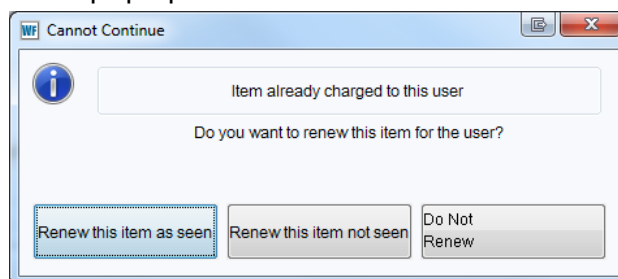
There is a video guide accompanying this cheat sheet which can be found here:

<https://www.youtube.com/watch?v=HvCMK6d9RBs>.

### Method One:

If a patron brings both items to be renewed and items to be checked out to the circulation desk:

- Open the Check Out wizard in the Common Tasks toolbar
- Scan or type the user ID number into the User ID box.
- Scan or type the item ID into the Item ID box
  - i. This box will pop up:



- ii. Click on the “Renew this item as seen” box.
- Scan or type in the remaining item IDs for patron.

### Method Two:

Find the Renew Item wizard in the Common Tasks toolbar. Use this wizard if a patron is physically in the library and wants to only renew items:

- Scan or type the item ID into the ITEM ID box.
- The title of the item and the new due date will be displayed in the window.

### Method Three:

The next wizard in the Common Tasks toolbar is the Renew User wizard. Use this wizard to renew items without seeing the items or if renewing a group of items. This wizard is useful when renewing items over the telephone.

- Scan or type the user’s ID number into the User ID box.
- After the list of items appear in the window:
  - i. Renewing all the items:

Place a checkmark in the “Select all” box above the display window with the list of currently checked out items. A checkmark will appear in the boxes under ‘Renew” in the display window.

- ii. Renewing over the telephone or patron does not have the items: Uncheck the box labeled “Select all seen.” The checkmark will clear in the boxes under “Seen” in the window.
  - iii. Click the “Renew Selected Items button” on the bottom of the screen
- A new window will display the title of the item(s) and the new due date.

#### **Method Four:**

If a wizard contains Enhanced Circulation, placing the cursor on any information for an item and right clicking the mouse will expand a drop-down menu with several options.

- Select a single item or a group of items from the patrons Current Checkout list.
  - i. Right click the mouse to receive a drop-down menu.
  - ii. Select “Renew as Seen” or “Renew as Unseen” from the drop-down menu.
  - iii. A confirmation box will pop up. Select ‘OK”
- The Date Due will change for the renewed item in the Current User Checkout box.

#### **Pop Up Boxes**

If the item has reached the renewal limit the “Renewal Limit Override” box will pop up.

- If your library owns the item, you may:
  - i. Charge the item out to the patron:
    1. Type the generic override into “Renew Limit Override” box
    2. Click the “Override & Renew Item” button
    3. The title and new due date will appear in the window.
  - ii. Not charge the item out to the patron:
    1. Click the “Do Not Renew Items” button
- If your library does not own the item:
  - i. You must contact the owning library for permission to override the renewal limit. Items belonging to another library **may not** be renewed without permission from the owning library.
  - ii. Tell the patron the item cannot be renewed. Label the item and place in delivery.
- If the item has a hold, a “Hold Block Override” box will popup.
  - i. Tell the patron the item cannot be renewed.
    1. Discharge item.
    2. If your library is the pickup library:
      - a. Proceed with local hold procedures
    3. If your library is not the pickup library:
      - a. Label the item and place in delivery.

- ii. If the patron still wants the item, you will need to place a hold for another copy.

Important: The “Select All” option renews all items charged out to a patron. If a patron has items charged out from another library, verify the patron wants those items renewed also.

Items are renewed from the renewal date, not from the due date. If an item is due on July 7 but renewed on June 26 then the due date will be your loan period from June 26, not July 7.

Due dates can be longer or shorter than your library loan period. To specify a special due date: use the Special Due Date helper at the top of the wizard.

Contact the RSA Help Desk at [help@rsanfp.org](mailto:help@rsanfp.org) or call 866-940-4083.