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# From Traditional Loans to Autorenewals

Converting from traditional loans, renewals and holds to autorenewals and hold recalls

- ★ Background, options, and benefits
- ★ Problems, pitfalls, and surprises

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with

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# Leeds Beckett Library

- ★ 2 Campus Libraries
- ★ 139 staff
- ★ 350,000 items
- ★ 795,000 transactions
- ★ 90% via self-service



- ★ Open 24 / 7 / 365
- ★ 1.3 million visits



# Background

- ★ Students' Union Request
  - “No more fines” in President's manifesto
- ★ From staff visits to other Unis, aware of trend
- ★ Financial implications - could we afford to lose income?
- ★ Weigh off against service improvement benefits
- ★ Needed senior management sign-off

# Options

- ★ Benchmarked 19 UK Unis using “no-fine” model
  - mostly on autorenewal (and mostly Alma!)

Considered 2 main options

- ★ Autorenewals
  - Need for autorenewal custom report – cost! (\$700)
  - “We’ll renew it for you (unless it’s been recalled)”
- ★ Much longer loans
  - Possible with standard Symphony options
  - “Keep it for longer (unless it’s recalled)”

# Option Chosen

## ➤ Autorenewals (weekly)

- ★ Message more dynamic - “we’ll renew it for you” vs “we’ll just let you keep it longer”
- ★ Not really comfortable with “you can have these things a REALLY LONG TIME”
- ★ A lot more sites operating weekly autorenewals than anything else - so plenty of sources of advice on policy, publicity, pros and cons, etc.

# Benefits

- ★ Library-student relationship (You said – we did)
  - (and staff get benefits as well...)
- ★ Improved stock circulation
- ★ Books “in demand” circulate more
- ★ Not waiting as long for holds
- ★ Reduction in unnecessary fines – only fine when book is wanted
  - but fines much bigger - £2/day instead of 20p!

## Return on time, avoid a fine!

Remember to check your University email for any messages asking you to return your loans if they are needed by someone else. We'll only fine if you don't return by the date shown.

Fines are £2 per item per day.

[library.leedsbeckett.ac.uk](http://library.leedsbeckett.ac.uk)

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# Risk(s)

## Huge reconfiguration of entire lending model!

... and not easily reversible

Short timescale



**If you want it,  
request it!**

Because we automatically renew items on loan it's really important that you put a hold on something you want if it's on loan to someone else - don't just wait for it to be returned!

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# Implementation

- ★ Started well in advance – lots of planning
- ★ Complete revision of:
  - Circulation Map
  - Underdue/Overdue notices
- ★ Test server – trialled as best we could with non-live data
- ★ Lots of liaison with Lending teams
  - They performed trial issues, holds and returns mimicking as many scenarios as possible - first on test server, then on live

# Implementation

- ★ New Circ Rule names begin A- so easy to spot
- ★ Unseen Renewal count used to limit renewals (26 for students, 52 for staff, 10 for guests)
- ★ Renewals set to be from Due Date (not date of renewal as before)
- ★ ... and limited to only day before due
- ★ autorenewal reports run at 0:50, so effectively less than an hour when self-renewals possible
- ★ but then eLibrary config changed to no self-renewal anyway!

# Implementation - Circ Rules

Name: 2W-1W-5-ST	A-HE-ST
Description: 2 week loan, 1 week alt loan, 20 renewal, standard	Autorenew, HE undergraduate, Standard
Loan period: 2-WEEKS	1-WEEK
Billing structure: STANDARD	AUTORENEW
Renew limit: 20	UNLIMITED
Unseen renew limit: UNLIMITED	25
Renew from: <input type="radio"/> Due date <input checked="" type="radio"/> Date of renewal	<input checked="" type="radio"/> Due date <input type="radio"/> Date of renewal
unseen renewals within this number of days before due date: 0	1
<input checked="" type="checkbox"/> Loanable	<input checked="" type="checkbox"/> Loanable
Maximum loans: 25	15
Grace periods are in <input checked="" type="radio"/> Days <input type="radio"/> Hours <input type="radio"/> Minutes	<input checked="" type="radio"/> Days <input type="radio"/> Hours <input type="radio"/> Minutes
Grace periods 0 Days	Grace periods 0 Days
Recall grace period 0 Days	Recall grace period 7 Days
<input checked="" type="checkbox"/> Overridable	<input type="checkbox"/> Overridable
Recall loan period: UNLIMITED	1-WEEK
Alternative loan period: 1-WEEK	1-WEEK
<input checked="" type="checkbox"/> Save loan history	<input checked="" type="checkbox"/> Save loan history

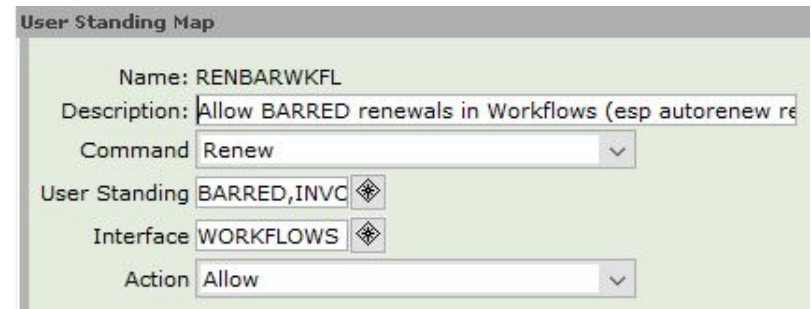
# Implementation - custom report

Adjustments made by SD in contract testing period:

- ★ Does not send notices
- ★ Override so holds on items don't block renewal

We added:

- ★ User Standing entry to allow renewals for BARRED users (so items still autorenew regardless of user status)



The screenshot shows a 'User Standing Map' configuration window with the following fields:

- Name: RENBARWKFL
- Description: Allow BARRED renewals in Workflows (esp autorenew re
- Command: Renew (dropdown menu)
- User Standing: BARRED,INVC (checkboxes)
- Interface: WORKFLOWS (checkboxes)
- Action: Allow (dropdown menu)

# Publicity

★ Blogs, lots of revision of webpages, displays, etc!

AUGUST 22, 2017/

## We'll renew for you! Changes to renewals and fines for 2017

We're always working hard to make it as easy as possible for you to get the resources you need and help make using the Library as easy as possible. For 2017 we've made some changes to the way resources are renewed and fines charged:

- We'll renew for you so you don't need to (excluding **Laptop Loans**, **Short Loans** and automatic renewal of **Interlibrary Loans**).
- We'll keep renewing for up to **6 months** unless someone else needs the item or you finish your course.
- We'll email your **University email account** to tell you if you need to return your items.
- You'll need to return requested items within **7 days**. **Offsite students** and those

registered with **Disability** can have more information.

- Fines have increased for those who need the resource a lot.
- If you want to borrow something that's already on loan you need to request it by putting a **Hold** on it.

OCTOBER 23, 2017/

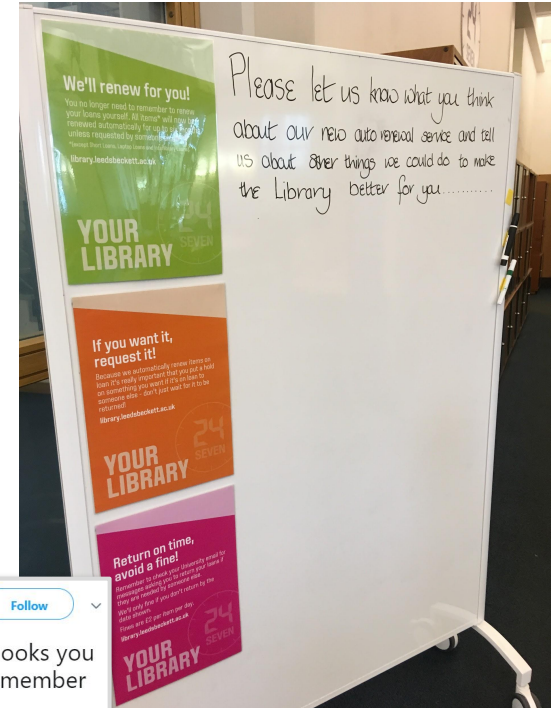
## If you want it, request it!

We introduced our new **automatic renewal** system in October, meaning that we'll keep renewing for up to **6 months** unless someone else needs the item or you finish your course. So if you want to borrow something that's already on loan you need to request it by putting a **Hold** on it.

### But what happens when you place a hold on something?

If the item is already on loan an email is sent to the University email of the person who has it asking them to return the item, as it has been requested by another user. They then have 7 days to return the item (Offsite students and students with disabilities have slightly different arrangements – see their web pages for more information).

Once the item has been returned our **Hold teams** step in! They process the item and put it on





# Problems

- ★ Initially, Holds made on catalogue didn't generate Recalls
- ★ We hadn't noticed an eLibrary config option:
  - **HOLD\_RECALL\_STATUS|2|** # instead of 1  
(1 = No Recall, 2 = Standard Recall)
- ★ Overdue vs Recall vs Assumedlost notice reports
  - Overdue can masquerade as Recall
  - Assumedlost raises LOST bill & sets LOST-ASSUM, but can't include Recall Date Due on notice

# Problems

Accidentally misconfigured some reports:

- ★ Initially, some recalls were being re-sent every day for a week
  - misconfigured date limits!
- ★ Recently, have found some items not receiving Assumed Lost bills or Invoices
  - current location left at ON-LOAN instead of LOST-ASSUM



# Problems - due date display

- ★ People were confused by due dates a week away when we were saying they could keep items for 6 or 12 months.
- ★ Recall due dates set at 7 days from Recall
  - Not the same as regular Due Date
  - But Overdue status based on regular Due Date
- ★ Resolved by removing due dates from the Catalogue display.
- ★ (And pre-existing customization does correct colour-coding for imminent due date!)

# Problems - 3-week Recall

- ★ For some users, items have an initial non-recall period of 3 weeks but are auto-renewed weekly
  - Initial issue period also determines renewal interval
  - So weekly auto-renewal requires initial issue period of 1 week as well
  - causing confusion between 1-week/3-week periods
- ★ Custom report:
  - runs each morning
  - adjusts due date for items issued the day before under Circ rules requiring 3-week initial loan

# Problems - Books by Mail

- ★ Hold Recall report generating **MRUL not loaded** errors
- ★ Fails to Recall items that were issued using a Mailing Rule
- Known Bug - UNI-29897
- Our Offsite service staff run a report periodically to list affected items and place a proxy hold not involving a mailing service!

# Surprises!

## Recall Overdues fined differently from regular ones

- ★ Not levied until end of period (day), not beginning.
- ★ E.g. book due on Wednesday not fined until end of Thursday, instead of first thing Thursday
- ★ Effectively an additional day's grace
- Fixed in 3.5.3.1? - UNI-29897

**Hold Recall report doesn't send notices - need additional Recall Notice report**

# Surprise Problems!

- ★ Handling of Recalls in our environment
  - Using title-level holds so that first copy returned fills hold
  - Holds of on-shelf items allowed
- ★ To keep title-level holds, need to use **Hold Recall Without Modifying Hold Level** report (NOT plain **Hold Recall**)
- ★ Multiple consequences - interesting, questionable and problematic!

# Surprise Problems - Recalls

- ★ If there are multiple holds on a title, and at least one is filled by an on-shelf copy, recalls for other holds are not generated the same day.
- ★ If a copy which hadn't been recalled is returned:
  - it's trapped to fill the hold (correct)
  - the hold is cancelled (correct)
  - but the count of Recall notices sent for the outstanding recalled item is not reset to zero (oops!)
  - item can be recalled again (correct)
  - but no Recall notice can be sent (oops!)

RE ✓✓

↓  
K

↓

M ✓✓✓

ASSUM-LOST  
NO RECALL DATE

(✓) BUT RECALL NOTICES > 0  
DUE ABOUT 3-4 WEEKS AGO

→ SEND INVOICE!

\* RECALLED HOLDS EXPIRING, CANCEL RECALL  
ITEMS - NOT RECALLED + ON-LOAN

BUT RECALL NOTICES > 0

→ RESET # RECALL NOTICES

✓ → CALC. NEW DUE DATE + # RENEWALS

\* INITIAL LOAN PERIOD 3 WEEKS NOT SHOWN

ITEMS - ISSUED YESTERDAY

✓ & CIRC. RULE W. RECALL LOAN  
PERIOD = 3-WEEKS

→ SET DUE DATE 3 WEEKS AWAY

& # UNSEENS TO 2

✓ & # SEENS TO 2  
& PLAUSIBLE RENEW DATE



# Where are we now?

- ★ Now 9 months since launch
- ★ Has generally operated smoothly from day 1
  - (with caveats already mentioned!)
- ★ Negligible level of complaints
- ★ About to review before heading into new academic year
- ★ Not anticipating any huge change - maybe some tweaking to harmonise students and staff on a 12-month limit?

# A few facts and figures...

	Jan-Jun 2017	Jan-Jun 2018	Change
<b>BILLS</b>			
<b>Paid</b>	<b>£25,416.26</b>	<b>£4,816.16</b>	<b>-81.1%</b>
WAIVED	£9,008.21	£5,360.50	-40.5%
CANCELLED	£104,743.99	£77,039.57	-26.4%

- ★ -81%!!!
- ★ Waiving a greater proportion - leniency for users unfamiliar with a new system?
- ★ Lesser reduction in Cancellations unsurprising - mostly replacement charge being rescinded when assumed lost items returned

# A few facts and figures...

HOLDS	Nov 2016 - % of Placed		Nov 2017 - % of Placed		Change 2017->2018
	Jun 2017	16-17	Jun 2018	17-18	
Placed	16,530		13,284		-19.6%
Filled	11,217	68%	8,759	66%	-21.9%
Exp. on Shelf	3,642	22%	3,160	24%	-13.2%

- ★ Fewer Holds is a surprise - had anticipated an increase because of “If you want it, reserve it”!
- ★ Going to rename Holds as Reservations

★ On the other hand...

LOANS	Nov 2016 -	Nov 2017 -
	Jun 2017	Jun 2018
	155,098	135,715

# Any regrets?

No, not really...

- ★ Has worked well and achieved objectives
- ★ Very positive reaction from users

From a technical point of view:

- ★ Long loan period (6 or 12 months or more) would be much easier to implement, with fewer oddities to work around!

# Any Questions?



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