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Set up Policies and Exceptions

Policies are rules that control your patrons and items. In Preferences, click on Policies.

Set your default Standard Patron and Item to how you want most patrons and items to behave.

Important fields for Patron Policies:

Check Out: Maximum Loaned Items, Use Calendar, and Apply Period Due Dates.

Overdue: Maximum Overdue Items, Maximum fine, and Allow Renewals When Fines Are Owed.

Other: Maximum holds and reservations, and Keep Patron History.

Important fields for Item Policies:

Check Out: Default replacement/purchase Cost, Max Renewals, and Transaction Period.

Overdue: Fine Rate and Grace Period, and Declare Lost When it's been Overdue x number of days.

Other: Allow Hold Requests.

Add your new policies defaulting from those Standard policies.

Although each item policy applies to every patron policy and visa versa, you can add Exceptions to the rules.

Choose the policies for which you need Exceptions, click Exceptions to enter Exceptions mode, and make your changes. Save your changes, then click Exceptions again to exit the mode.

In this case, Audio-Visual items have no Transaction Period, nobody can check them out, except for Staff patrons, for whom we've made an exception.