"But what if...?"—Policy Exceptions

October 28th, 2019

How would you limit reference books so that only staff can check them out? Or, what if you needed to restrict third graders from checking out more than three DVDs at a time when usually they can check out up to five items? In Alexandria, you can do both of these things and more with Policy Exceptions!

Create a Policy Exception

Policy Exceptions modify the relationships and behavior between selected patron and item policies. And creating one is easy:

1. Go to **Tools > Preferences > Policies**.
2. Use the two dropdown menus to select the Patron Policy and Item Policy that, when combined, will create the policy exception.
3. Click the **Exceptions** button. It should turn red.
4. Go through the various tabs for both policies (Check Out, Overdue, and Other) and change the fields, dropdown menus, and checkboxes to the appropriate values.
5. When you have successfully created your exceptions, click **Save**.
6. A red outline should appear around every exception that was made (field, dropdown menu, and checkbox). You can check to make sure all of the appropriate exceptions are showing up.

You can also modify and remove existing exceptions. Keep in mind that changing a policy will not affect past transactions (i.e. items that are already checked out).



Still on version 6? Learn about switching to Alexandria 7!