

'Tis the season for a holiday policy!

November 2nd, 2020

Pumpkin spice and everything nice is in the air, and Miss Honey just got a bunch of new holiday books. These will be perfect for storytelling time, class activities, and more! But... how can she shorten check-out periods for just these books? They're sure to be popular, so everyone should get a turn. With Alexandria, the answer is simple: policies.

Policies allow you to customize transaction periods, fine rates, renewals, and more for different types of items. So, we recommend you create a holiday policy for your library!

Create a holiday policy

1. Go to **Preferences > Policies**.
2. Click **Add** or **Duplicate** at the bottom of the **Item Policy** pane.
3. Fill out your new policy's name (e.g. Holiday), short code, statistics group, and defaults. Click **Add** when you're done.
4. Make any necessary modifications to your new policy. Here are some specific preferences you may want to change:
 - a. **Check Out** tab
 - i. Maximum Renewals for Item
 - ii. Transaction Period
 - b. **Overdue** tab
 - i. Fine Rate
 - c. **Other** tab
 - i. Allow Hold Requests
 - ii. Maximum Reservation Days
5. Click **Save** in the top right-hand corner when you're done.

Make any necessary exceptions

You might want to make exceptions to these new rules. For example, you may want to allow teachers to check out holiday books for 14 days instead of the standard 5 days for patrons. This can be done with the **Exceptions** tab in **Policy Preferences**.

1. Make sure the patron (Teacher) and item policy (Holiday) combination that needs the exception are selected in the **Patron Policy** and **Item Policy** panes.
2. Click the **Exceptions** button (it will turn red).
3. Make any necessary changes to the **Patron Policy** or **Item Policy** panes. For example, you could change the Transaction Period to 14, so teachers can have holiday books a little longer than patrons.
4. When you're done, click **Save** in the upper right-hand corner, and then click the **Exceptions** button to return to normal settings.

Give books the holiday policy

Change the policy for a group of items all at once with either the **Change Title Policy utility** (if your policies are the same across all sites) or **Change Copy Policy utility** (if your policies differ by site).

Alternatively, you can change item policies through Circulation:

1. Gather all of your holiday books and items that need their policy changed.
2. In **Circulation**, use the **Change Item Policies command** by entering UI + holiday policy (e.g. UI Holiday) into the command line and pressing <Enter>.
3. Scan the barcodes of all holiday items to change them to the Holiday policy.
4. When finished, type a period (.) into the command line and press <Enter>.

At the end of the holidays, return those items to their original policies by using the same utility or by following the Circulation instructions but with the original policy (e.g. UI Fiction).



Need to keep certain books in the library for activities? Check them out to the For Library Use (3) **system patron**. Then no one else can check them out!



These steps will work in v6 or v7. Still on version 6? [Learn about switching to Alexandria 7!](#)

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