Policy Exceptions

ⓘ this page has been moved to https://support.goalexandria.com/tools/policies/

Exceptions

The standard settings configured in the subtabs of the Patron Policy and Item Policy sections are the general rules for the selected patron and item groups (e.g. 6th Grade and eBook). Exceptions to these rules are set in an appropriate combination of a patron and item policy. Exceptions mode allows you to modify the behavior and relationships between selected patron and item policies to further customize your policy settings.

The standard settings configured in the subtabs of the Patron Policy and Item Policy sections are considered the general rules for the selected patron and item groups (e.g. 6th Grade and eBook). Exceptions to the way these combined policy groups interact in Standard Mode can be adjusted by clicking the Exceptions tab, which will then turn red to indicate you're in Exceptions Mode. This mode allows you to modify the behavior and relationships between selected patron and item policies to further customize your policy settings.

For example, if you have a policy for "Staff" and another for "Projectors", you may want your staff to be able to check out projectors but only staff members and no other patrons under any other policies

One rule of thumb when creating an exception is to set up the policy based on how it will apply to the majority of users, and then set up the exceptions.

For example:

- You can make an exception that items belonging to the Reference policy only circulate to members belonging to the Staff patron policy. While the standard Transaction Period for the Reference item policy could be set to 0 days, an exception to the policy could be made so that the patron Staff policy may check out the reference books for 3 days.

- Similarly, if you have a patron policy for IT (Information Technology) and an item policy for Projectors, you may want to give your information technology specialists the ability to check out projectors, but only them and no other patrons under any other policies. Set the Transaction Period for Projectors to 0 days, then make an exception for your IT policy.

- While you usually allow your 4th Grade patrons to check out 5 items at a time, you may want to limit them when it comes to music CDs.
  - Select the 4th Grade Patron Policy on the left and the Music CDs Item Policy on the right.
  - Click the Exceptions tab (it will turn red).
  - Change the Maximum Loaned Items checked out to 3.

⚠️ Policy exceptions are checked during each transaction but still apply to the patron as a whole. Continuing with the example above, let's say a 4th grader already has 3 items checked out (of any type) and wants to check out another item. If that item is a music CD, they *won't* be able to check it out because it references the exception and sees that their limit is 3 items. But if the item is a book, they *will* be able to check it out because their normal limit is 5 items.

In other words, the Maximum Loaned Items is not looking at each item's type; the exception is only referenced when there's a transaction between a patron of this type and an item of this type.

When you save your changes, the fields, dropdown menus, or checkboxes with exceptions will be highlighted in red to indicate that they're exceptions to the default standards.

Policies subtabs that contain an exception will display an alert icon (i.e. warning sign) to the left of the name to indicate that an exception is present for the selected Patron/Item policy combination.

Step-by-Step Instructions

Click the Exceptions button and it will turn red to inform us that we are in Exceptions Mode. Once in this mode, make changes to the desired policy tabs and fields. When you save your changes, a red box will appear around the modified fields. Once you are finished, click the Exceptions button again to leave the Exceptions Mode.

When the Exceptions button is yellow, you know that there must be an exception involving your item and patron policies. The yellow alert icon (i.e. warning signs) that appear in the Policies tabs inform you as to where your exceptions are located. If you switch to a policy that does not have any exceptions, the **Exceptions** button will not be yellow and there not be an Alert icon.

To remove exceptions, click the Exceptions button and then the Actions drop-down menu located at the bottom of the Patron policy section (on the left) or the Item policy section (on the right). Here you can choose to remove any selected or all patron or item exceptions depending on which Actions drop-down menu you selected.

Create an Exception

1. Go to Tools > Preferences > Policies.
2. From the dropdown menu, 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 Policies tabs (Check Out, Overdue, Hold, Reservation, and Other), changing the appropriate values to the fields, dropdown menus, and checkboxes.
5. When you have successfully created your exceptions, click Save.
6. A red outline should appear around every exception (field, dropdown menu, and checkbox) that was made.

> ⚠ Changing a policy will *not* affect past transactions.
>
> To change the fine rate on a book that is currently checked out, check the book in to forgive the fine, then check it out again to the same patron and use the Set Due Date command to assign the original due date.

Modify an Exception

To modify an exception:

1. Go to Tools > Preferences > Policies.
2. From the dropdown menu, select the Patron Policy and Item Policy that, when combined, contain your policy exception.
3. Click the Exceptions button (it should turn red).
4. Go through the various Policies tabs (Check Out, Overdue, Hold, Reservation, and Other), changing the appropriate values to the fields, dropdown menus, and checkboxes.
5. When you've successfully modified your exception, click Save.
6. A red outline should appear around every exception (field, dropdown menu, and checkbox) that was made.

> ⚠ Changing a policy will not affect past transactions. The only way to change the fine rate on a book that is currently checked out is to check in the book, forgive the fine, and check out the book to the same patron for the old due date (using a manual override date).

Remove an Exception

To remove a policy exception:

1. Go to Tools > Preferences > Policies.
2. From the dropdown menu, select the Patron Policy and Item Policy that, when combined, contain the policy exceptions that you would like to remove.
3. Click the **Exceptions** button (it should turn red).
4. Once in Exceptions Mode, use the Actions dropdown menu to remove policy exceptions using one of the following three selections:
   - **Remove Selected Exception.** Go through the various Policies tabs (Check Out, Overdue, Hold, Reservation, and Other); place your cursor on (or in) the red, outlined fields, dropdown menus, and checkboxes and select the Remove Selected Exception from the Actions dropdown menu.
   - **Remove Patron/Item Exceptions**. Depending on your selection, this will remove all of the Patron or Item policy exceptions. For example, selecting Remove Patron Exceptions from the Actions dropdown menu in the lower-left hand side of the Patron Policy section will clear all of the patron policy exceptions (fields, dropdown menus, and/or checkboxes outlined in red) from the selected Patron Policy.
   - **Remove All Exceptions.** This selection will remove all the Patron and Item exceptions from the selected Patron and Item Policy.
5. When you have successfully removed your exceptions, click Save.