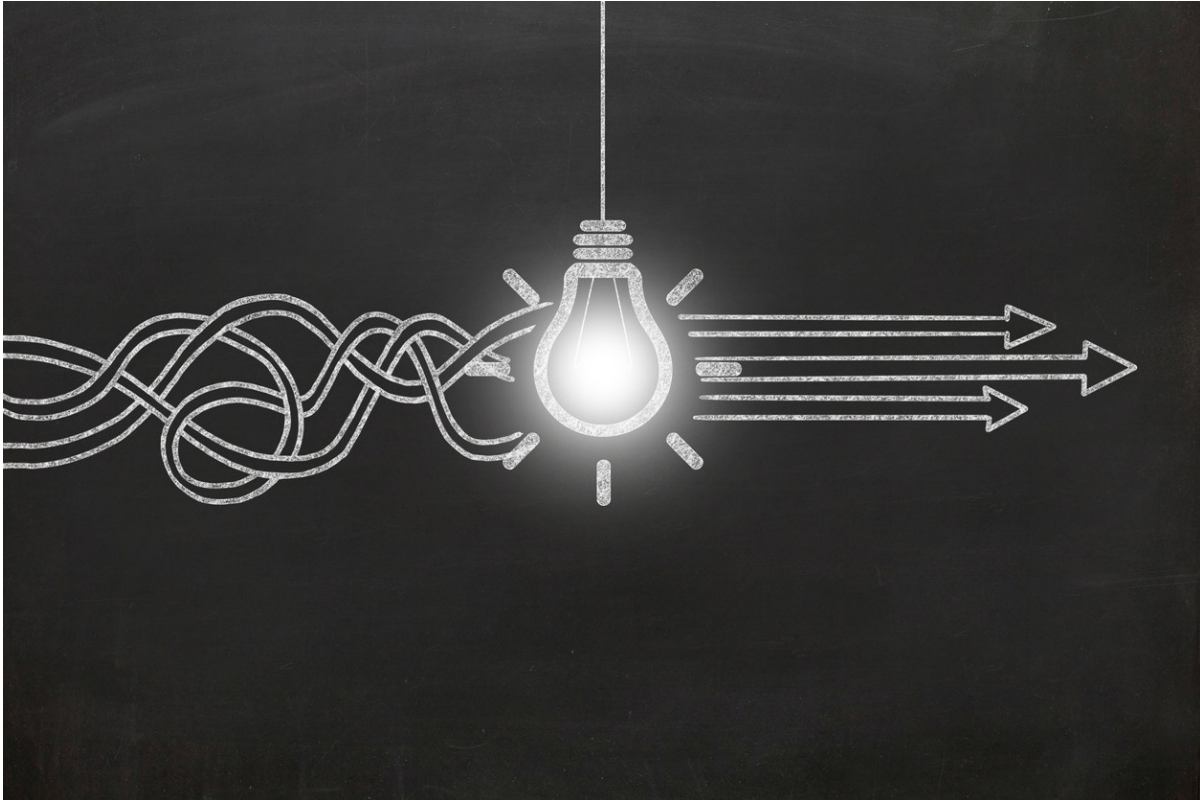


# Assigning policies—the complete guide

March 28 2022

Ms. Honey has been re-working her system of item and patron policies to best serve the new demands on her library, but now it's time to assign the right policies to the right patrons/items. How can she perform this task with accuracy and efficiency? We'll tell you how.



## Patron Policies

There are several different methods you can use to assign patron policies.

### Method 1: Utility

The [Change Patron Policy utility](#) works great if you have a way to group the patrons together, such as by grade or a grade range. Check out [Are your Utilities running?—Take the right steps](#) for more info on running utilities.

Change Patron Policy

Change Patron Security Group

Selections

Options

Change the policy to the value specified under the Options tab for:

Patrons at Site

JES – Jefferson Elementary School

Patrons with a Status of

Active

Patrons in Security Group

Patron (5)

Patrons with a Policy of

Elementary Student

Patrons from

Homeroom

From

Through

Patrons in Grade

01

04

Patrons added

From MM/DD/YYYY

Through MM/DD/YYYY

Show Additional Selections

Create Saved Utility

Run

1. Go to **Tools > Utilities** and select the [Change Patron Policy utility](#) on the right.

2. In the **Selections** tab, enter the criteria needed to select the patrons you want to update.

- *Patrons with a Status of:* Limit the operations to one particular status, like **Active**, or choose **Any** to include them all.
- *Patrons in Grade:* Enter the user-defined value for the grade(s) you need to change. Check **Tools > Authority Control > Grade** to ensure there are no stray grade numbering patterns and be sure to use the exact value you see there. Example: 01 is not the same as 1. When selecting a range of grades, you may also want to check the **Preferences > Patrons > Grade Table** to ensure your grades are sorted in the correct order.

3. In the **Options** tab, choose the policy that will be assigned to the selected patrons.

4. Run the utility.

## Method 2: Circulation Command

You can also assign patron policies by using the Circulation Command [Change Patron Policies](#).

This is a good method if you have patrons come in as groups, and you either don't have them grouped in Alexandria, or you don't feel comfortable using Utilities.

1. From Circulation, enter the two-letter "**UP**" command and hit **<enter>**.
2. Select the Policy you are assigning to the patrons.
3. Scan or enter the patron barcodes into the command line.
4. When done, use the "." command and hit **<enter>** to exit the mode.



Hot tip! If you want to change the policy for an entire homeroom in Circulation, go through steps 1 & 2, then open the homeroom tab to the correct homeroom and just double click each patron down the list.

## Method 3: Import File

**Settings**

**Import Settings**

☐ Skip First Record

**Defaults**

Site: AMS - Adams Midd...

Patron Policy: Elementary Student

Security Group: High Student

**Patron Updates**

Add a new record for records when a match email is found.

☒ Standard Patron

☐ System Patron

☐ Always Create New Records on Import

☒ Allow Import to Modify Existing Records

**Barcode Handling**

The following selection determines whether barcodes in the import file will be retained or reassigned starting with the barcode shown in the field below.

Starting Patron Barcode: 1100001

☐ Assign new Barcodes

☒ Use Barcodes in Import File

☐ Strip Leading Alpha Characters

Create Saved Import Run


See [Quick Patron Import](#) and [Patron Imports Best Practices](#) for assistance with Imports.

- Make your import do twice the work by using the Policy dropdown to assign everyone in the file to the same policy when you're running an import.
- You can also use a tab-delimited export file in your favorite spreadsheet program to change the set policy shortcodes. Find the shortcodes you need by going to **Preferences > Policies** and selecting the policy you need from the drop down. Be careful to limit your changes to the policy column and import your changes when you're done.

	A	B	C	D	E	F	G	H
	First Name	Last Name	Grade	Barcode/Student ID	UN	PW	Policy	
2	Ronald	Weezley	5	45658		45658	45658 SHORTCODES GO HERE	
3	Hermione	Granger	5	45269		45269	45269 SHORTCODES GO HERE	
4	Harry	Potter	5	45236		45236	45236 SHORTCODES GO HERE	
5	Severus	Snape	Staff	39412		39412	39412 SHORTCODES GO HERE	
6	Albus	Dumbledore	Staff	39621		39621	39621 SHORTCODES GO HERE	
7	Luna	Lovegood	4	45216		45216	45216 SHORTCODES GO HERE	
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21								

#### Method 4: Manual Changes

This method can be time consuming, because you modify the records one patron at a time.

1. Go to **Patron Management** and find the patron record you want to modify.
2. Unlock the record .
3. Use the **Policy** dropdown to select the new policy.
4. Click **Save**.

## Item Policies

#### Method 1: Utility

You can use the [Change Title Policy utility](#) (if your policies are the same across all sites) or the [Change Copy Policy utility](#) (if your policies differ by site). Check out [Are your Utilities running?—Take the right steps](#) for more info on running utilities.

These utilities work great if you have your items in a call number range (e.g. the fiction policy can be selected by FIC AAA- FIC ZZZ).

1. Go to **Tools > Utilities > Titles > General > Change Title Policy**.
2. On the **Selections** tab, use the field **Title** in call number range (this will need to match the actual call numbers you are using).
3. On the **Options** tab, select **Change Policy To** menu and select Fiction (or whichever you are changing).
4. Run the utility.

Selections

Options

☐ Match titles to policy of first copy  
☒ Change Policy to

Biography

Easy Reader

eBook

Equipment

Fiction

Non-Fiction

✓ Standard Item

System Item

Textbook

Web Page

Create Saved Utility

Run

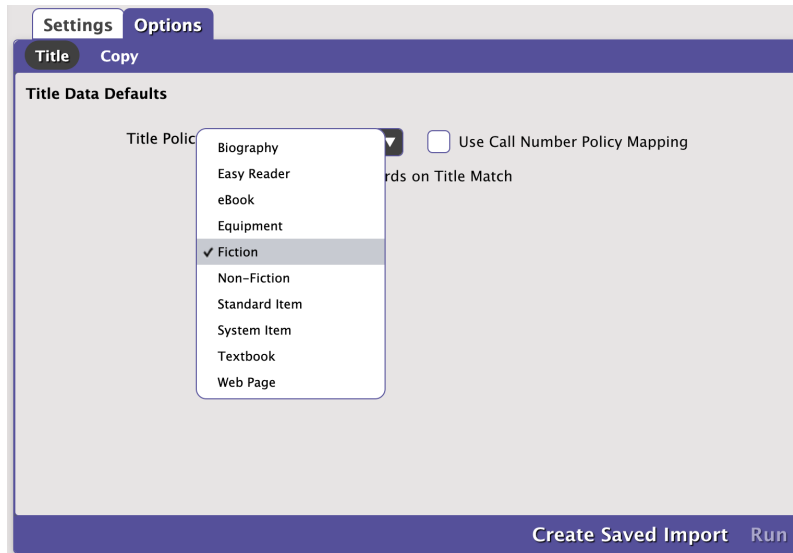
#### Method 2: Circulation Command

You can also assign item policies by using the Circulation Command [Change Item Policy](#).

1. From Circulation, enter the "UI" command and hit **<enter>**.
2. Select the policy that you're changing the items to.
3. Scan the barcodes of the items you're modifying.
4. When done, use the "." command and hit **<enter>** to exit the mode.


### Method 3: Import File

- When running the item import, go to **Options > Title and/or Copy** subtab, and use the Policy dropdown to assign all items in the file to the same policy. This works great if you have one import file per policy you are assigning.
- You can also use a tab-delimited export file in your favorite spreadsheet program to change the set policy shortcodes. Find the shortcodes you need by going to **Preferences > Policies** and selecting the policy you need from the drop down. Be careful to limit your changes to the policy column and import your changes when you're done.
- Or, you can use [Policy Mapping](#).



### Method 4: Manual Changes

Modifying records one item at a time is awfully time-consuming. (Are you sure you want to do that?)

1. Go to **Item Management** and find the item record you're modifying.
2. Unlock the record .
3. Use the **Policy** dropdown to select the new policy (there are both Title and Copy Policy drop-downs)
4. Click **Save**.



Changes made to existing policies are only applied from that point forward. If you want the updated policies to apply to existing checked out items, go to **Tools > Utilities > Circulation > Recompute Due Dates** and run.



Did you know we have a whole page of [FAQs](#)? Check it out for quick answers to your everyday questions in Alexandria.