

Set up Policies and Exceptions

Tip for: 09.29.14

[Policies](#) are rules that control your patrons and items. Here's a quick overview!



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

To set your Standard Patron:

- From **Preferences**, click on **Policies**.
- Set the **Patron Policy** drop-down to **Standard Patron**.
- Under the **Check Out** tab, set **Maximum Loaned Items**, **Use Calendar**, and **Apply Period Due Dates**.
- Under the **Overdue** tab, set **Maximum Overdue Items**, **Maximum Fine**, and **Allow Renewals When Fines Are Owed**.
- Under the **Other** tab, set **Maximum Hold Requests**, **Maximum Reservations**, and **Keep Patron History**.
- Make any other changes to the policy.
- **Save**.

To set your Standard Item:

- From **Preferences**, click on **Policies**.
- Set the **Item Policy** drop-down to **Standard Item**.
- Under the **Check Out** tab, set **Default Replacement/Purchase Cost**, **Maximum Renewals**, and **Transaction Period**.
- Under the **Overdue** tab, set **Fine Rate**, **Grace Period**, and **Declare Lost When it's been Overdue [X number of] Days**.
- Under the **Other** tab, choose to allow or not **Allow Hold Requests**.
- Make any other changes to the policy.
- **Save**.

To add a new patron/item policy:

- Click **Add** at the bottom of the patron/item side.
- Set the **Defaults from** to **Standard Patron/Item**.
- Enter the **Policy Name** and **Short Code** (for reports).
- Press **OK**, then **Save**.

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

- Bring up the applicable Patron and Item policies.
- Click **Exceptions**.
- Make changes that will only apply between these two policies.
- Save your changes.