

Policy Preferences

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Policies

- [Patron Policies](#)
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Use the Policies preferences to establish rules that regulate how library resources are used by your patrons; this includes how items circulate, how long items may be checked out, how much overdue fines cost, whether an item can leave the building, how circulation periods are computed, and so forth. Policies are important for the purposes of circulation, reports, and statistics.

For example, you can set policies that allow tenth graders to check items out for longer periods of time than second graders; the borrowing period for reference items can be set for one day, while fiction and non-fiction works can be set for two weeks.

Alexandria collects statistics on each group of patrons, such as the types of items they borrow and when they are returned. These statistics are generally used to determine usage patterns for the library so that management can schedule staff accordingly and make educated administrative decisions.

Each group of patrons and items (for which usage statistics are collected) can be assigned a separate policy. For example, if each grade level of students has its own policy, the statistics generated are more useful and accurate than if you have only one policy for all students.



Centralized Catalog libraries need to realize that **Policies** are global, so that means that everyone needs to “buy in” to making the changes especially for **Item** policies since **Policy Mapping** might become useless if you do not keep things standard and simple. For instance, if you have a fiction policy that is different for each school, your **Policy Mapping** will not know which fiction policy to use for items that have call numbers beginning with *FIC*! This could lead to a great deal of extra work every time you import items.

Using Policy Preferences

Policy Preferences

The Policies window is divided into two distinct sections that function independently of one another and allow you to create or customize the settings of a particular Patron or Item policy.

An operator can move through any of the subtabs located at the top of the window (Check Out, Overdue, and Other) at any time, no matter the current mode (i.e. Standard or Exceptions).

The screenshot displays the 'Policy Preferences' window, which is divided into two main sections: 'Patron Policy' and 'Item Policy'. Both sections have a 'Standard' dropdown menu at the top. The 'Patron Policy' section has subtabs for 'Check Out', 'Overdue', and 'Other'. The 'Item Policy' section also has subtabs for 'Check Out', 'Overdue', and 'Other'. The 'Check Out' subtab is selected in both sections. The 'Patron Policy' section includes fields for 'Patron Policy Short Code' (STD), 'Alert When Charges Exceed' (\$25.00), 'Maximum Loaned Items' (5), 'Items Are Due On' (Any day), 'Force' (checkbox), 'Use Calendar' (Standard), 'Only Count Open Days in Loan Period' (checkbox), 'Apply Period Due Dates' (checked), and 'Statistics Group' (Standard Patron). The 'Item Policy' section includes fields for 'Item Policy Short Code' (STD), 'Loan Fee' (\$0.00), 'Default Replacement / Purchase Cost' (\$20.00), 'Maximum Renewals for Item' (1), 'Hard Due Date' (mm/dd/yyyy), 'Statistics Group' (Standard Item), and 'Transaction Period' (14 Days). Both sections have a 'Notes' field at the bottom. The bottom of the window has buttons for 'Add', 'Remove', 'Duplicate', and 'Rename' for both sections.

Standard Mode

Every patron must belong to a Patron policy; the rules of a particular Patron policy apply to every patron under that policy. An Item policy will be applied to every item in your collection; the rules of a particular Item policy apply to every item under that policy.

The settings of a particular Patron policy apply to every Item policy. For example, selecting 3rd Grade as your Patron policy and changing the Maximum Loaned Items to 6 will limit every patron in the third grade to six items of any Item policy, whether it be Fiction or Non-Fiction.

Exceptions Mode

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

Read [Policy Exceptions](#) for more information and step-by-step instructions.