Set loan parameters

Learn how to set loan parameters in Amlib.

*Amlib* can be set to observe loan rules based on either Borrower Types and Form Code (most common) or Borrower Types and Stats Code. This is set in **Main > Supervisor > Installation – Circulation** tab setting: Loan by STATS (Y) or FORM (N). It is **not** recommended that libraries switch between these without discussing the issue with *Amlib Support*, as this will have major impacts on your library’s statistics.

![Amlib loan parameters setting](image)

### Altering Loan Parameters

1. Launch the *Amlib* client
2. Go to **Main > Borrowers > Borrower Types** – the Borrower Types screen will display:
3. Highlight the Borrower Type you would like to edit and click the F7 Loan button – the Loan Parameters and Borrower Types screen (for that Borrower Type) will display.

4. Edit the columns as necessary to control the loan parameters and click the F3 Save button when complete.

The above example uses the combination for Borrower Type and Form Code (the other option is by Borrower Type and Stats Code):

https://help.oclc.org/Library_Management/Amlib/Circulation/Set_loan_parameters

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<table>
<thead>
<tr>
<th>CODE</th>
<th>DEFINITION</th>
</tr>
</thead>
<tbody>
<tr>
<td>Code</td>
<td>The item Form/Stats Codes in the system (from Main &gt; StockItems &gt; StockItemForms or Main &gt; StockItems &gt; StockitemStatsCodes)</td>
</tr>
<tr>
<td>Description</td>
<td>Item Form/Stats Code Description</td>
</tr>
<tr>
<td>(H)ourly, (O)verbnight, etc</td>
<td>Loan period type</td>
</tr>
<tr>
<td>Can Loan (Y/N)</td>
<td>Whether or not the patrons with this Borrower Type can loan items with that Form/Stats Code</td>
</tr>
<tr>
<td>Loan Qty</td>
<td>The number of items with that Form/Stats Code that a patron with this Borrower Type is allowed to borrow</td>
</tr>
<tr>
<td>Loan Days</td>
<td>If the loan term is Daily, how many days can items with that Form/Stats Code be loaned by patrons with this Borrower Type</td>
</tr>
<tr>
<td>Grace Period Days</td>
<td>(Fines) How many days overdue can an item be overdue before applying fines</td>
</tr>
<tr>
<td>Can Renew (Y/N)</td>
<td>Whether or not patrons with that Borrower Type can renew items with that Form/Stats Code</td>
</tr>
<tr>
<td>Qty Renew</td>
<td>The number of times that patrons with that Borrower Type can renew a particular item with that Form/Stats Code</td>
</tr>
<tr>
<td>Can Rsve (Y/N)</td>
<td>Whether or not patrons with that Borrower Type can reserve items with that Form/Stats Code</td>
</tr>
<tr>
<td>Rsve Qty</td>
<td>The number of items with that Form/Stats Code that patrons with that Borrower Type can have on reserve at one time</td>
</tr>
</tbody>
</table>
Setting Overall Loan, Reservation and Date Due Limits by Borrower Type

It is possible to set overall limits per Borrower Type on the total number of items (regardless of Form/Stats Code) that a patron may loan, the total number of reservations (regardless of Form/Stats Code) a patron may have at once and the date by which all items must be returned with that Borrower Type – for example: Year 12 students who may be finishing earlier than other Year levels.

These settings will over-ride/limit the Loan Parameters settings created above.

1. Launch the Amlib client
2. Go to Main > Borrowers > Borrower Types – the Borrower Types screen will display:

3. Locate the Borrower Type you would like to place the overall limit on and alter the columns as necessary – for example: Year 12 – Return By Date = 12/10/2011
4. Click the F3 Save when complete
5. Log off the Borrower and Circulation modules for these settings to take effect

Term, Year and Semester Loan Types

It is also possible to set the loan periods (for items with a particular Form/Stats Code) by term, semester or year loan periods. This requires dates to be set in Supervisor module for the system to use as due dates (see below) and for the loan term column to be set with a Yearly (Y), Semester (S) or Term (T) code.
In the above example, the loan term column has been set to Y for Year – any item with this Borrower Type and Form/Stats Code combination will be limited to the All Year loans are due back on the following date: setting in the Supervisor screen:

1. Launch the Amlib client
2. Go to Main > Supervisor > Installation
3. Click on the Circulation tab – the Installation (DEFAULT) screen will display:

4. Locate the following settings and change the due date to be used for any item set up with a Yearly (Y), Semester

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(S) or Term (T) code in the Loan Parameters and Borrower Types screen:

- All items must be returned by the following date: this is mandatory setting but may be set to a date very far in the future – for example 01/01/2080 if you do not have a date that you require ALL items to be returned by
- All Semester loans are due back on the following date: end of semester date – for example: 19/07/2011
- All Term loans are due back on the following date: end of term date – for example: 05/04/2011
- All Year loans are due back on the following date: end of year date – for example: 12/12/2011

![Loan Parameters and Borrower Types screen](image)

5. Click the **F3 Save** button when complete
6. Exit and restart the *Amlib* client for the settings to take effect Check the Locations

End of term/ semester/ year dates can also be set by individual location, so it is very important to also check your circulation locations to see if dates need to be updated. For some libraries this may just be the LIB location and for others it may be for each branch:

1. Launch the *Amlib* client
2. Go to **Main > Supervisor > Installation** - the Installation (DEFAULT) screen will display
3. From the menu, select **Installation > Choose Location**

![Installation screen](image)

4. The Installation prompt will display
5. Highlight an individual location – for example: *Hastings Library* – and click the **OK** button
6. Click on the Circulation tab – the Installation screen for that location will display

7. Enter the due dates as necessary for that location:

8. Click the F3 Save button when complete

9. Exit and restart the Amlib client for the settings to take effect

Please Note: It is not a requirement to have circulation dates set against individual locations, however if dates do exist in the locations they WILL override what is set in the DEFAULT screen and then need to be updated. If your library does NOT require different dates for different locations, it is recommended that all dates on the locations screens for these settings be removed, leaving only dates in the DEFAULT screen, as this prevents problems with forgetting to update a location and running into circulation blocks.

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