Loan Limit Matrix
Last updated: Tue, 13 Aug 2019 15:25:07 GMT

Find information about creating or editing rows in the loan limit matrix to apply loan limit policies to patron types and items.

To access this screen, sign in Service Configuration, open the WMS Circulation left navigation, select Loans, and then select the Loan Limit Matrix link.

Use the Loan Limit Matrix screen to apply loan limit policies to patron types and items.

Processing order

1. When an item is checked out, the system evaluates all rows in the matrix for any matches.
2. If the system finds one or more matches, it determines whether any loan limits (loan count, loan value, renew time) have been exceeded.
3. If one or more loan limits have been exceeded, the reason(s) will be displayed in an Acknowledgement window. Depending on your account type, you will need to override or acknowledge the message in order to allow the circulation transaction. See Circulation Account roles, Overrides for more information.

It is recommended to have a row to cover all patron types, material formats, branches, and locations.

Create or edit rows in the loan limit matrix

1. On the Loan Limit Matrix screen, fill in the fields in the order below:
   1. Patron Policy: Select the Patron Policy from the list. Create patron type policies on the Patron Type Policy screen.
   2. Material Format: Material format is defined in an item's master record. For more information, see Material Type Names and Codes to determine how the master record provides material format.
   3. Holding Location: Holding Code, as set on the Holding Codes Translation Table screen. You must select a holding location in order to select a shelving location.
   4. Shelving Location: Shelving Location, as set on the Holding Codes Translation Table screen. If an item has a temporary and permanent location in WMS, the circulation policy will use the temporary location.
   5. Loan Limit Policy: Select the Loan Limit Policy from the list. Create loan limit policies on the Loan Limit Policy screen.
   6. Add/Delete(rightmost column):
      ◦ To add a row, click the Add button (➕).
      ◦ To delete a row, click the Remove button (➖).

2. Click Save.
Related policies

Loan Limit Matrix depends upon:

- Holding Codes Translation Table
- Loan Limit Policy
- Patron Type Policy