Loan Policy Map

Use this screen to apply loan policies and long overdue and lost 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 Policy Map link.

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Processing Order

When an item is checked out, the system evaluates the rows in the map in this order until a match is found:

1. Top to bottom (rows)
2. Left to right (settings in rows)

When the system comes to the row where all the elements match the transaction, it applies the policy contained in that row and will not continue to the next row.

- To change a row's position on the map, use the up (↑) and down (↓) arrows.

It is recommended to:

- Put your most restrictive rows at the top of the map
- Have a row at the bottom of the map to cover all patron types, material formats, branches, and locations

Create or edit rows in the loan policy map

1. On the Loan Policy Map 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 WorldCat record. For more information, see Material Type Names and Codes to determine how the WorldCat 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 Policy:** Select the Loan Policy from the list. Create loan policies on the Loan Policy screen.

2. If needed, add or delete rows:
To add a row, click the Add button (➕).

To delete a row, click the Remove button (➖).

3. To change a row’s position on the map, use the up (▲) and down (▼) arrows.

4. Click Save.

Related policies

Loan Policy Map depends upon:

- Holding Codes Translation Table
- Loan Policy
- Long Overdue and Lost Policies
- Patron Type Policy