

How to Set Up and Use Patron Type Loan Periods for Circulation of Items from the NOTEbookS Online Catalog

NOTEbookS has provided for the capability to use patron types in calculating loan periods when items are checked out from the NOTEbookS Online Catalog. Loan period settings are still maintained in the Tables database. The following describes how to set the NOTEbookS system up to use this capability and explains how it works. Since patron types need to be stored with the patron's name and other information, it is recommended that a database that can be modified be used for the borrower lookup database. The Notes Name and Address book will not be a suitable lookup database if it cannot be modified to include the patron type. NOTEbookS provides a patrons database to use for this purpose. It is called the NOTEbookS Patron database.

Set Up Instructions:

1. Open your Online Catalog configuration document and scroll to the section "Loan Period Settings".
2. Select "Yes" to use patron type loan periods.
3. Fill out the names of the patron types and then save the configuration document.
4. Open your patron database or the database where borrower lookups are performed and edit each of your patron records and in the field used for Patron Type, enter the appropriate patron type for the person. In the patron database, this field is called PatronType.
5. Then go to the Tables database and edit each of the Format table entries. Put the loan period for each patron type (patron type 1 - patron type 5) in the table entry.
6. Open the catalog database to the main Collection by Title view, expand all of the documents and do a Cntrl-A to select everything. Then go to the menu and select Actions, "Set Patron Type Loan Periods". This will populate the loan period settings for each patron type in each of the NOTEbookS catalog records. You should also run the agent "Set Loan Days" with all of the documents selected. This sets the default loan period in each of the catalog records.

How Patron Types Work During Circulation

When items are checked out from the NOTEbookS Online Catalog, a check is performed to determine whether patron type loan periods are to be used. If they are, during the borrower lookup part of the check out process, the patron type will be retrieved from the borrower record. Since the patron type loan periods are stored in the catalog record, the loan period is retrieved based on the patron type and the default due date is calculated using this loan period. If the information is complete, that is, if the proper loan period for the patron is missing from the catalog record the default loan period will be used instead. This same process is used regardless of how items are checked out, ie. whether by barcode or from the catalog or circulation.