



BOOKMARK FACT SHEET

Restricting Loans

April 2021

Loan Restrictions limit the items which can be borrowed by certain borrowers.

By default all items can be borrowed by all borrowers.

However, it is possible to limit certain items to teachers only. Or other items can only be borrowed by year 6's but not lower grades. Or other items are not for loan at all.

Loan restrictions are based on the *borrower type*. All borrowers have a borrower type category, a number. Specific borrower type categories (or numbers) can be restricted.

Three methods of restricting items are available:

1. Every item has a "loan restriction" setting. Here the borrower types that are *allowed* to borrow this item are listed. This allows individual items to have specific restrictions. A global change can alter the loan restriction to many items at once.
2. Each borrower type can have certain *item types* restricted.
3. Every borrower has an individual restriction. This is to cover cases where parents may not allow their child to borrow a certain type of book. Like method 2, item types have to be set up assigned to the items.

Circulation Settings

In order for loan restrictions to work, parameters in Circulation must be set up.

Go to Controls then Circulation Controls.

Click on the Loans tab at the top.

Make sure a *Loan block password* has been entered. (Top right)

Make sure the checkbox *Override loan restriction* message is ticked.

Loan Blocks

Loan block password:

Loan block password requested for each of the following:

Setdate Extend Print Notice

Name Return Slip/Dump

Override overdue block msg:

Override loanlimit block msg:

Override loan restriction msg:

The box to the right of "msg" is the message to be displayed. You can click on it to change the message.

Closing this window autosaves any changes.

Method 1 – Restrict individual items

This is the standard way to set up a loan restriction.

Go to Cataloguing then Add/Edit Items.

Bring up an item to be restricted.

On the right side, look for the heading *Loan Restrictions*.

Loan restrictions: ...

A 0 indicates no restriction. Anyone can borrow this item.

Click on the 3-dot button on the right.

Loan Restrictions

Types of borrowers which can borrow this item...

Borrower Type	Checked
1 Junior primary	<input type="checkbox"/>
2 Primary	<input type="checkbox"/>
3 Senior Primary	<input type="checkbox"/>
4 Staff	<input checked="" type="checkbox"/>
5 Student teacher	<input checked="" type="checkbox"/>
6 Bulk loan	<input type="checkbox"/>
7 Japanese room	<input type="checkbox"/>
8 Library	<input checked="" type="checkbox"/>
9 Out of hours care	<input type="checkbox"/>
10 Music student	<input type="checkbox"/>
11 Contracts, TRT	<input type="checkbox"/>
12 Music room	<input type="checkbox"/>
13 Music	<input type="checkbox"/>
14 Left	<input type="checkbox"/>
15 Restricted Borrowing	<input checked="" type="checkbox"/>

Not for Loan

Set all Clear all OK Cancel

Tick the boxes of the *borrower types* are allowed to borrow this item. Any type *not ticked* is restricted. Tick every type that can borrow the item. Leave unticked the types that have the restriction.

After clicking on OK, the numbers of the borrower types are listed.
Save the item.

Repeat for other items.

The item can also be set to "not for loan", meaning no one can borrow it. It is the normal way to set this up. Another is to have a status type that does not allow borrowing or returning.

AddEdit Items deals with individual items. Global Change in Cataloguing can be used to assign restrictions to multiple items.

List the items to be restricted by either using a Query or scanning in barcodes.

Set the Change Field to Loan Restrictions

Set the change method to "Replace entire contents..."

Leave Find What blank.

In Replace With, type the borrower type numbers to be allowed to borrow the items. Put commas between each number. Example: 2,3,5 . No spaces.

Click on Start

Click on Change All.

OK.

Method 2 – Restrict based on Borrower Type and Item Type

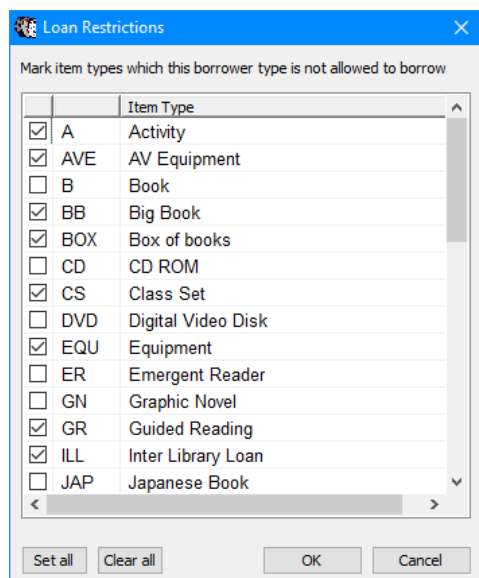
For this method to work, all the items to be restricted should have a specific item type - .e.g. "senior fiction".

Go to Borrowers then Authority Lists.

Click on Borrower Types.

Double-click on the borrower type which is to have the restrictions – e.g. 2 - junior students.

In the middle, click on the *Restriction* button.



Tick the boxes of the item types which this borrower type category is not allowed to borrow. This is the opposite of method 1.

email

education.bookmark@sa.gov.au

website

<http://bookmark.central.sa.edu.au/>

Click OK.

The restrictions are saved when the dialog is closed.

Method 3 – Restrict Individual Borrowers

Go to Borrowers then AddEdit Borrowers

Bring up the individual borrower to be restricted.

Click on the *Restrictions* button.

The list is present as above.

Tick the item types this borrower is *not allowed to borrow*.

Click OK.

Click Save.

Repeat for each borrower as needed.

This is useful in situations in which a parent does not consent to their child borrowing "senior fiction" but others in the same year level can.