

NExpress Catalog Policies

(compiled from November 2009 training via OPAL)

Catalog system preferences (one rule for all libraries):

- Maximum fine for a single late item: \$3.00
- Maximum amount a patron can owe before holds are blocked: \$10
- Maximum number of holds a patron can place: 100
- Maximum amount a patron can owe before checkouts are blocked: \$10
- Number of days a hold remains reserved for pickup: 7
- Whose circulation and fine policy applies to materials from another library at first checkout: Pickup Library (also called Transaction library)

Circulation periods and fines:

- Calendar settings:
Library Director can define weekly, yearly repeatable or unique holidays on a calendar. Loan periods will skip holidays, and fines will not accrue on holidays.
OR
Library can leave calendar holidays undefined, resulting in loan periods that will include every calendar day, and fines will accrue every calendar day, regardless of whether or not the library is open.
- Patron categories can affect certain circulation details, like the number of items of any given type that can be checked out (for example, 2 movies for Children, 4 movies for Adults; no fines for Outreach patrons; extended checkout for teacher, etc.)

Overdues:

- Library must define the time frame for sending overdue notices. A library can define up to three notices, and can block checkouts at any time after an item is overdue.
- Default notices have been set up for use, but a library can create its own customized notice if it wants.

Notifications:

- Libraries must define e-mail notification options at the time a patron record is established, or add them subsequently upon request.
- E-mail notifications options include Hold Pickup Notice (defaulted ON), checkout and return notifications, and Advance Notice of item due notifications (days in advance can be selected).
- All notifications depend on a valid e-mail address in the Primary E-Mail field of the patron record.

Renewals:

When an item is renewed, the renewal period begins on the date the renewal takes place. It is NOT added on to the end of the initial checkout period. This is a global system preference.

NOTE: There is also a current Koha bug around renewals that allows a renewed item to obtain renewal rules from the OWNING library of the item, rather than from the TRANSACTION library. This has caused some discrepancies when people renew materials sent from other libraries that

they've checked out their home library.

OPAC Logins:

Patrons and staff can log into their account from the OPAC using either their personal OPAC login or library card number and PIN (password). Both the account number of the OPAC login in conjunction with the PIN will work.

You can also log into the OPAC using the library's Staff Client login and PIN.

Hold Policies:

General information:

- All OPAC holds are Title-level holds, meaning the patron cannot choose a specific copy or library form which the hold will be filled. (They can, however, always designate their Pickup Library).
- From the Staff Client, holds can be specified at the Copy level, but this should be used rarely. See Hold Best Practices below for further details.

Setting Item-level hold policies:

NEKLS paid for an enhancement that allows libraries to assign hold policies to any item type, restricting the 'holdability' of those items, for example Cake Pans.

- From Any Library: Patrons from any library may put an item on hold. (default)
- From Home Library: Only patrons from the item's home library may put this item on hold.
- No Holds Allowed: No patron may put this item on hold.

These policies are enabled by special circulation rules THAT MUST BE SET UP FOR YOUR INDIVIDUAL LIBRARY. There are currently five separate item types set up for special holds:

These three policies restrict holds based on the patron's home branch.

LOCAL HOLD BOOK

LOCAL HOLD MOVIE

LOCAL HOLD ONLY (for items other than books or movies, such as cake pans or videogames)

These two policies disallow holds, regardless of patron's home branch.

WALK-IN BOOK

WALK-IN MOVIE

These special hold policies can be overridden by the circulation staff.

Hold Best Practices:

In the Staff Client, Koha offers a few options when placing holds:

- Add a note about the hold (useful to show original hold date when re-replacing a hold)
- Place a hold on the next available copy (default)
- Place a hold on a specific copy (see note below)

Place a hold on [DNS and BIND /](#)

Hold details

Patron: [Sharon Moreland \(1003008005994\)](#)

Priority: 2

Notes:

Pickup at:

Place a hold on the next available copy

Place a hold on a specific copy

Hold	Item type	Barcode	Home Library	Last Location	Call no.	Copy no.	Information
<input type="radio"/>	BOOK	1003008100204	NEKLS HQ		005.75 ALB		Not on hold

Note about placing holds on specific copies, or creating item-level holds:

Choosing a specific copy locks your hold request on to ONE item, whereas leaving it as 'next available' lets the hold be filled by as many copies as there are eligible in the catalog at any given time. For this reason, we strongly urge you to place holds ONLY using the 'next available' option.

Another thing that affects the holds queue is if you choose to apply a restrictive Item Type to an item in your collection. NExpress cataloging allows every library to apply the restrictive Item Types LOCALHOLD and WALKIN. These Item Types effectively remove items from the generally available pool of items. The fewer items in the pool, the longer people have to wait for holds. The more available items in the pool, the shorter the wait for people on the list. This was demonstrated empirically with the unrestricted item experiment recently run on several key titles in the catalog. The patron wait time was significantly shorter when this all items were unrestricted.

Unless you buy multiple copies of a title, we urge you to keep your NExpress items unrestricted. If you buy multiple copies, your first copy should be given an unrestricted Item Type; any additional items you purchase can be given a LOCALHOLD or WALKIN Item Type, if you wish. But if you only purchase one copy, it should not be given a restricted Item Type. Restricting the pool of items available to fill holds does a disservice to our patrons and diminishes the strength of our shared catalog environment. Unless you buy more than one copy of a title, please don't restrict holds on your only copy. We had general consensus that this principle would be observed as much as feasible at the May 6, 2010 NExpress Users Group Meeting, with local exceptions made on a case-by-case basis.

We also proposed that small and medium-sized NExpress member libraries reconsider their

acquisition practices to include multiple copy purchases of high-demand items. In a shared catalog environment, we believe that buying additional copies of high-demand items makes the most sense, even for the smallest budgets.

Other Topics of Interest:

- May 2010 Training post: <http://www.nexpresslibrary.org/may-2010-training/>
- Cataloging “on order” items (<http://www.nexpresslibrary.org/best-practices-for-cataloging-on-order-items/>)