

## 2.6 RESTRICTIONS ON OPERATIONS

Various restrictions on operations during loan procedures can be maintained by the **Home library / Restrictions on operations** method. You can define the validity of some restrictions for all members of the same category (e.g. membership validity period). You can also define the validity for other restrictions for all material of certain type (e.g. restricted number of reservations). In libraries with departments it is possible to define different restrictions for each department, except those types of restrictions which refer to membership validity.

You can define:

- Restricted number of copies on outside loan  
The restriction is taken into account for outside loan. If the restriction has already been set up for the member under "No. of copies on loan restr. (LOAN)", it has priority over the restrictions specified for that member category.
- Restricted number of copies on reading room loan  
The restriction is taken into account for reading room loan. If the restriction has already been set up for the member under "No. of copies on loan restr. (LOAN)", it has priority over the restrictions specified for that member category.
- Restricted number of loan renewal periods in COBISS/OPAC  
The restriction is taken into account while renewing loan periods in the My library service in COBISS/OPAC. If the restriction has already been set up for the member under "Renewal lim. (LOAN)" it has priority over the restriction specified for that member category.
- Restricted number of renewals in library  
The restriction is taken into account while renewing loan periods in library. If the restriction has already been set up for the member under "Renewal lim. (LOAN)" it has priority over the restriction specified for that member category.
- Restricted number of renewals via automated phone service
- Restricted number of renewals via self-checkout service
- Restricted number of reservations for member for reservations in library  
You will set up the restriction if you wish to limit the number of reservations of available and unavailable material for the member. The restriction is taken into account when reserving material in a library. If the restriction has already been set up for the member under "No. of reservations restr. (LOAN)", it has priority over the restriction specified for that member category.

- Restricted number of reservations for member for reservations in COBISS/OPAC

You will set up the restriction if you wish to limit the number of reservations of available and unavailable material for a member in COBISS/OPAC. If the restriction has already been set up for the member under "No. of reservations restr. (LOAN)", it has priority over the restriction specified for that member category. If the number of reservations in COBISS/OPAC is not defined and the restriction is defined for reservations in library, the latter will be taken into account for the member.

- Restricted number of reservations of material

You will set up the restriction if you wish to limit the waiting lists for reservations of unavailable material. Enter the maximum number of members that can be added to the waiting list. The restriction will be taken into account when reserving material both in a library and in COBISS/OPAC.

- Membership expiry date

You will define it in libraries where membership expiry is related to some specific date (e.g. end of school year). The date which is defined in that way will be taken into account when recording membership validity automatically, i.e. when renewing membership and recording debt for membership automatically. This date is not taken into account for those member categories for which you defined membership validity period.

- Membership validity period

Membership validity period is taken into account when recording membership validity automatically, i.e. when renewing membership and recording debt for membership automatically. It is possible to define different periods for each member category. The period is entered as *no*, where *n* stands for number and *o* for period (d – day, w – week, m – month, y – year, e.g. 3m is for three months.)

### **Procedure**

1. In the **Home library** class select the method **Restrictions on operations**. The **Select restriction type** window will open.
2. Highlight the restriction and confirm the selection by clicking the **OK** button.

If you selected restriction type *Restricted number of copies on loan – outside loan* or *Restricted number of copies on loan – reading room*, a window will open where you will define whether the restriction will be applied to the department or to the whole library (Home library).



Note:

*If you defined that the restriction would apply to a whole library (in a library with departments), you do not need to define restrictions for each*

*department in the library. However, if you defined the restriction for the whole library and for each department at the same time, only the restriction defined for each department will be taken into account.*

3. The window for entering restriction will open.

- If you selected a restriction that refers to restricting the number of copies on loan, you can define different restrictions for individual types of material (rows in the table) and for individual member categories (column in the table). Restrictions for individual "subtypes" of material (e.g. *books – fiction*) will be taken into account on the basis of entry to subfield 675s. If you enter subject code to subfield 675s ("UDC – Statistics") 82 (fiction), 78 (music) or 79\* (entertainment), it is recommended to enter restrictions for "subtypes" of material as well.



**Tip:**

It is possible to define the highest possible number of items on loan regardless of the type of material. This number is entered into the row "max. total number".

If there are certain restrictions set up for the maximum number of items on loan for each type of material, these restrictions are also taken into account. In this case, the member can borrow the maximum number of items of a certain type of material, and the total number of all items on loan must not exceed the number, defined by the total restriction.

- If you selected a restriction that refers to the number of loan renewals or to the number of reservations for the member, a window will open where you can define different restrictions for each member category (rows in the table). In libraries with departments you can define different restrictions for individual departments (columns in the table), but in that case you do not enter restrictions for the home library at the same time (1<sup>st</sup> column of the table).
- If you selected a restriction that refers to the number of reservations of material, a window will open where you can define various restrictions for individual types of material (rows in the table). In libraries with departments you can define different restrictions for individual departments (columns in the table), but in that case you do not enter restrictions for the home library (1<sup>st</sup> column of the table).
- If you selected the restriction *Membership expiry date*, a window for entering the date will open.
- If you selected the restriction *Membership validity*, a window will open where you can define different restrictions for individual member categories (rows of the table).

**Tip:**

If the same restriction applies for example to all member categories, you can copy the value by entering it to one table cell, then select it with the mouse and press the keys <Ctrl <C>, then select the table cells where you wish to copy the value and copy the value by pressing the keys <Ctrl> <V>.

4. Save the changes by clicking the **OK** button.