

LL – Loan Plan

1 Introduction

The Loan Plan functionality is developed to support another type of concept for circulation rules, other than the current tariff structure for memberships, possibly in combination with loan fees.

In this scenario users of the library can “buy” a subscription that entitles them to lending X number of items per subscription period.

The functionality described here presupposes that the system does **not** use memberships as generally available within V-smart. The functionality described here is based on a link between special parameters and borrower categories, not membership types. This last concept is incompatible with the functionality described here.

Note

It also means this concept is based on a subscription period of 1 year.

It is possible to use the Loan Plan concept in conjunction with the standard principles of borrower categories and memberships, within which materials can be lent based on the regular parameters.

A number of the functions described here hang closely together. For clarity’s sake they are described separately. Where necessary we will point out between which parameters / functionality a relationship exists.

2 Maximum number of items per borrower record

Objective

The option to link a maximum number of items that can be loaned to a borrower record. This is not the existing maximum present within V-smart as “maximum number of items a borrower can have on loan” but in the sense of “maximum number of items that can be lent during the subscription period”.

Explanation

When the maximum number of items to be loaned is reached, further loans are not possible. The borrower needs to purchase a new subscription.

The number of items for a subscription can be defined per institution/location and borrower category.

Please note

The options regarding validity of a subscription (due date of a subscription) are similar to those for a membership. This means that a subscription will be regarded as expired at the end of the subscription period defined, irrespective of whether or not the maximum number of loans has been used.

A parameter ensures that a particular subscription type (i.e. modification of the maximum number of items to be lent) can only be assigned once during the subscription period.

Maxim number on multiple levels

The maximum numbers can be defined on three levels: "total", "per item category", "per group (combination) of item categories". So this means multiple maximums rather than one.

See also the remarks for the following points:

- maximum number of renewals
- adjust loan counter with other units than 1
- messages related to the loan counter

Please note

All other algorithms and parameters related to maximum numbers and validity of memberships are unchanged.

3 Messages related to the number of items per borrower record

Objective

The option to view the number of remaining loans (for subscriptions with a maximum number as described under 2).

Explanation

The maximum number of loans remaining can be viewed as follows:

- as an option in the borrower administration
- as an option in the primary circulation activities (loans, renewals, payments)
- on various circulation slips (loan slips, return slips, payment slips)
- under user activities in the WebOpac.

It is also possible to define at which moment (e.g. ultimate or penultimate loan) a message must be shown that the maximum number of loans has (almost) been reached.

4 “Free loans and renewals”

Objective

The option to specify that for a certain number of loans and/or renewals of specific (combinations of) material types no loan fee will be charged, where this normally would be applicable.

This is an absolute number that can not be defined per material type.

Explanation

There is a parameter to specify for how many loans and/or renewals no loan fee will be charged. This number does not apply to the number of items a borrower can have on loan at any given moment, but to the number of items lent during a (subscription) period.

To achieve this there are two counters that record the number of loans and renewals. This does not pertain to the number of loan and/or renewal transactions, but to the number of items lent / renewed. Each time an item is lent or renewed, the counter will be decreased.

If the loan or renewal is free, no message will be displayed. Once the counter reaches zero, the normal rules for charging loan and/or renewal fees will be applied (as in the standard application).

This counter can be viewed in the borrower administration, within the “Details” option and on the loans and renewals screens under the borrower’s details.

This counter is automatically reset to the value defined in the parameters whenever the subscription is renewed or the borrower category changes.

Notes

A change to the material type of an item does not lead to an update of the counters.

This parameter can be set separately for loans and renewals.

These options could also be used to determine that for certain borrower categories X number of loans and/or renewals are free, although normally fees would apply, without using the rest of the loan plan functionality. In that case you should set the maximum number of loans to 9999, so the limit would normally never be reached.

5 Change in subscription type

Objective

A change in subscription type has the following consequences:

- a new start date is created
- all loans related counters will be reset to the number specified in the parameters
- all counters related to 'free' loans/renewals will be reset to the number specified in the parameters

Explanation

The system keeps tracks of the number of items lent. When changing the subscription type these counters are reset. This means a borrower can not roll forward "credits" to another subscription.

Please note

The algorithms for calculating/recalculating subscription fees are the same as for regular memberships.

6 Adjust loan counter with other units than 1

Objective

The option to adjust the number of loans with other units than 1, depending on material type.

Explanation

This means that on loan of a material the counter need not necessarily be decreased by 1, but can also be decreased by 2 or 3 (for example: a book counts as 1 unit, a CD as 2 units. etc.)

It is also possible to adjust the counters manually. The details screen of a borrower in AFO 431 has an option to adjust the counter. This can however never be to a value higher than the maximum defined in the parameters.

- **Document control - Change History**

Version	Date	Change description	Author
1.0	June 2008	creation	