



How to Set Up Delinquency Codes

Releases 14.2 and later

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Delinquency Codes

tab_delinq.eng is the table that defines the patron's delinquencies for Circulation purposes.

Delinquency codes can be defined on two levels:

❑ **Global Level:**

Type 1 - the patron will be blocked in all the sub-libraries that belong to the system, on the ADM level. Type 1 refers to the patron's Z303 record.

❑ **Local level:**

Type 2 - the patron will be blocked in a particular sub-library. Type 2 refers to the patron's Z305 record.

Global Delinquency Codes

Delinquency code type 1, Z303 Global delinquencies, is not related to a sub_library or to the patron's permissions but rather to the patron on the ADM level. As a result, the mere fact that the patron has a Z303 delinquency code attached to his record, traps all circulation transactions he tries to perform, with the exception of placing hold and photo requests.

The 00 delinquency code is used for denoting “no global delinquency”. All other Z303 delinquency codes have the same functionality. The only difference between them is their description (column 6 below), which shows the reason for the delinquency.

Following is an example from the USM50/tab/tab_delinq.eng table:

| 1 | 2 | 3 | 4 | 5 | 6 |
|----|---|---|---|---|------------------------------|
| 00 | 1 | | | L | No User delinquency code |
| 01 | 1 | | | L | Global user delinquency code |
| 01 | | | | | |
| 10 | 1 | | | L | Delinquency 10 |

Column 1: Delinquency code

Column 2: Delinquency type (in this case, type 1 for global level)

Columns 3 & 4 relate only to the local level

Column 5: Alpha

Column 6: Description

Local Delinquency Codes

On the Local level, delinquency code type 2, the librarian can determine for each code, which circulation privileges will be blocked for patrons having this delinquency code. Type 2 codes refer to the patron's Z305 record that belongs to a specific sub-library.

In general, delinquency codes are set to always block loans and renewals, and are not supposed to block hold requests. However, one can define specific delinquency codes whose purpose is to block hold requests.

The privileges that can be blocked are:

a = Z305-LOAN-PERMISSION (not implemented)

b = Z305-PHOTO-PERMISSION

c = Z305-OVER-PERMISSION

d = Z305-MULTI-HOLD

e = Z305-LOAN-CHECK

f = Z305-HOLD-PERMISSION

g = Z305-RENEW-PERMISSION (not implemented)

h = Z305-RR-PERMISSION;

The librarian can specify which privilege will be blocked for each delinquency code. For example, you can set the system to block only the hold permission for patrons with delinquency code 01.

The following is an example of tab_delinq.lng from the USM demo database:

| | | | | |
|----|---|-------|----------|--------------------------------|
| 00 | 2 | ##### | | L No borrower delinquency code |
| 01 | 2 | ##### | NN | L Borrower delinquency code 01 |
| 02 | 2 | ##### | N N | L Borrower delinquency code 02 |
| 03 | 2 | ##### | NNNNNNNN | L Borrower delinquency code 03 |

Column 1: Delinquency code

Column 2: Delinquency type (in this case, type 2 for local level)

Column 3: The sub-library this code refers to. Use ##### for all.

Column 4: Borrower permission to be blocked. Use "N" to list the privileges you wish to block (a-h). Otherwise leave the space blank.

Column 5: Alpha
Column 6: Description

From release 12.3 the tab_check_circ table defines the checks that are performed when a user or librarian tries to loan or renew an item. The 1a and 1b checks in tab_check_circ check if the patron has any delinquencies (Z303 and Z305), but do not check the kind of delinquency. If any delinquencies exist, loan and renewal will be denied. This is a problem if the type of delinquency is not supposed to affect renewal (for example no photocopy requests allowed). This problem can be overcome by disabling the checks in tab_check_circ.

System Generated Delinquencies

Delinquency Code 50

The library can decide to assign a delinquency code to any patron who registers himself through the Web OPAC.

On the Web page, bor-new, the library can assign a new borrower a delinquency code with specific restrictions.

Following is an example of the bor-new file from the USM demo database:

```
<input type="hidden" size=20 name=M-Z303-ALPHA      value="L">
<input type="hidden" size=20 name=M-Z303-DELINQ-1   value="50">
<input type="hidden" size=20 name=M-Z305-DELINQ-1   value="50">
<input type="hidden" size=20 name=M-Z305-BOR-STATUS value="01">
<input type="hidden" size=20 name=M-Z305-LOAN-PERMISSION value="N">
<input type="hidden" size=20 name=M-Z305-PHOTO-PERMISSION value="N">
<input type="hidden" size=20 name=M-Z305-OVER-PERMISSION value="N">
<input type="hidden" size=20 name=M-Z305-MULTI-HOLD   value="N">
<input type="hidden" size=20 name=M-Z305-LOAN-CHECK   value="N">
<input type="hidden" size=20 name=M-Z305-DELIVERY-TYPE value="N">
<input type="hidden" size=20 name=M-Z305-HOLD-PERMISSION value="Y">
<input type="hidden" size=20 name=M-Z305-RENEW-PERMISSION value="N">
<input type="hidden" size=20 name=M-Z305-RR-PERMISSION value="N">
<input type="hidden" size=20 name=M-Z305-IGNORE-LATE-RETURN value="N">
```

According to this setup, the library assigns the new borrower

- ☐ Delinquency code 50
- ☐ Borrower status 01
- ☐ Privilege to place a hold request. All the other privileges are blocked.

This setup is **Optional**. The library can choose not to assign any delinquencies to new borrowers who self register.

Delinquency Code 70

Code 70 is a system defined global delinquency code. A library can choose to automatically set this delinquency code for a patron who returns an item more than a certain number of days late. In this case, when an overdue item is returned, delinquency code 70 is automatically placed in the patron's Z303 record (Global user information) in the Delinquency-1 or Delinquency-2 field. If the Delinquency-1 field is empty, it will be set to code 70. Otherwise, Delinquency-2 will be set to code 70, regardless of whether it has already been set to another code. A library that wishes to use this feature should NOT use the Delinquency-2 field in the Global User record for other purposes.

A library that wishes to use this feature must have the following line in /alephe/pc_server_defaults:

```
setenv overdue_delinq_period nn
```

where the "nn" is two digits and should be set according to library policy. It indicates the number of days late; for example, if set to 03, the Global User record will be set with delinquency code 70 only if items are returned 3 or more days late. The global delinquency code 70 will be displayed in the Global User Information form in the GUI, along with the date it was set.