



Purpose

This document is a template to be used to map the patron types and bill reasons from your local system (ILS) to WMS.

Patron types

Patron types are used to create Circulation policies (such as loan and loan limit policies) in [OCLC Service Configuration](#). Moving from your ILS to WMS is an opportunity to decrease the number of patron types, which often makes patron-related policies simpler and easier to maintain.

ILS	WMS
Display Name	Display Name
Undergraduate Student	Student
Non-Student	Non-Student
Admin/Faculty	Administrator
Library Staff	Staff
Graduate Student	Student

Note: In WMS, patron types cannot exceed 30 characters.

Bill reasons

These actions must take place before your fines and fees are migrated:

1. You must send the list of bill reasons to your OCLC Implementation Manager
2. Bill reasons from your ILS must be added to [OCLC Service Configuration](#) by your OCLC Implementation Manager

Moving from your ILS to WMS is an opportunity to decrease the number of bill reasons, which often makes bill-related policies simpler and easier to maintain.

Examples of common bill reasons:

ILS	WMS
Damaged	Damaged
Lost item processing	Lost item processing fee
Lost item replacement	Lost item replacement fee
Old system blocks	Past charges
Overdue	Overdue