Alma Administration – Fulfillment
Configuring User Blocks

Hello, Blocks restrict users from using library services such as borrowing, renewing, etc. due to fines, outstanding loans, or repeated late item returns. In order to implement a blocking policy you must first configure the User Block Descriptions code table, which are then used to define the User Block Definitions in the definitions mapping table.

The definitions table then creates the block on the patron’s account based on your configured settings of the descriptions table.

In this session you will learn how to create a user block policy including how to use and edit the user blocks table and who can override them.

You need to create a new block for suspended students, you’ll start by defining the user block descriptions.

To access the User Blocks Description table, you’ll go to Configuration > Fulfillment > Patron Configurations > User Block Description. Here you can see a table of all the current blocks including their codes and descriptions. For example, a patron’s account may be blocked for too many claimed returned items or have restricted permissions because they need to meet with their academic advisor.

You can make edits to each line or click the row action tool and choose Delete to remove a block from the list.

To create a new block you’ll click Add Row, enter a Code… a description… and determine whether or not this block will be the default. Setting a Code to the default will list it as the default selection on the Block Definitions creation menu, when you need to choose which description to apply; which you will create next. When you’re done click Add Row, and then Save.

Next you need to go to the Mapping Table, go to Fulfillment > Patron Configurations > User Block Definitions.

To add a row for the block you just created on the previous table you’ll click Add Row, enter an ID, choose User for Type, and then select the Description you just created.

The Description tells the Definition what type of block and why it is being applied based on the code you defined in the Descriptions mapping table.

Next you’ll choose who is able to override this block.

* ALL means any Circulation Desk Operator can override
* NONE means that the block is not overridable
* CIRCDESC means that only a Circulation Desk Manager can override it
* And OPERATOR means that it is overridable by a Circulation Desk Manager or a Circulation Desk Operator but not an Operator with limited permissions

BlockedAction has three preconfigured options:

* 1 – only blocks loans
* 2 – blocks loans and renewals
* 3 – blocks loans, renewals, and hold requests

Lastly, open the Network Block dropdown and select whether the block will be copied when creating or refreshing a linked account. When you’re done click Add Row. And then Save.

Your new block can now be applied to a suspended student’s account, and they will not be able to check out or renew loans.

You now know how to create a user block. Thanks for watching!