Alma Administration – Fulfillment  
Overdue and Lost Loan Profiles

Hello, Overdue and Lost Loan Profiles monitor overdue loans and turn them into lost loans when needed. These profiles send notifications and letters to the patron for overdue and/or lost loans, as well as creating fees and user blocks.

In this session you will learn what Overdue and Lost Loan Profiles are including how to add, edit, and remove them as well as how to configure when notifications are sent, and when the loan or item status should be changed to lost.

Alma runs a daily job, Loans – Overdue and Lost Item, to process overdue and lost loans according to the profiles configured in your system.

You can configure the Overdue and Lost Loan profiles by going to Configuration > Fulfillment > Physical Fulfillment > Overdue and Lost Loan Profile. Here you will see a list of all the current profiles at your institution. You can enable and disable a rule by toggling the switch in the Enable column, as well as mark whether or not it should create an overdue loan fine.

To edit a profile click on the row action tool and select Edit. From here you can make any changes to the profile record.

The Profile Type determines whether overdue items that meet the criteria of the Lost Loan Profile will be considered lost, or if a notification will be triggered. You can set up to five different notification letters that will be progressively sent to the patron about how overdue their item or items are, within the profile. These letters are configured to be sent based on how many days a loan has been overdue. For more information about how to configure letters please visit the Knowledge Center. If the profile is set to create a fine, the amount is set by the Profile Type and the applicable Terms of Use policy. You can find more information about Profiles and Terms of use in the Knowledge Center.

Once you’re done click Save.

Additionally, from the row action tool menu you can also delete, duplicate, or run now which will create the notifications for that rule on demand.

The Status Update feature allows you to run the Overdue and Lost Loan job without creating blocks or fines and fees, changing the loan to lost, or generating notifications. Impacted loans will be marked, and not handled again, meaning that a loan fitting the criteria of lost and/or overdue notification profiles at the time of the status update will not be handled by the matching profiles again.

The Status Update feature must be turned on in order to have the Status Update selection in the row action tool menu. To turn this feature on you’ll go to Fulfillment > General > Other Settings.

The Mapping Table shows various fulfillment parameters that can be configured within Alma. Scroll down to “switch\_to\_overdue\_and\_lost\_loan\_new\_job”… if this is not marked as “true”, click the row action tool and select edit, and change it to “true”. Once you Click Save, the Status Update feature will be enabled in the Overdue and Lost Loan Profile menu selections.

Go back to the Overdue and Lost Loan Profile List page.

You need to create a new profile for non resident overdue items. To do this, click Add Overdue and Lost Loan Profile. Enter the profile Name, and a Description if you’d like. Check the Active box if you want this profile to be enabled.

Next you’ll select the Profile Type. If Change to lost is selected, the check boxes, which are under this menu, for Send Notification, Create Overdue Loan Fine, and Create Block will disappear; and the Letter send format field will be required.

However, in this case you’ll select Overdue Notification type 2.

Fill in the remaining criteria as needed. Please note that if any field are left blank, the profile will apply to all. When you are done click Save.

When you are returned to the Overdue and Lost Loan Profile List, you may be prompted to run a Status Update on the profile you just edited. This would mark any existing loans that would be impacted by your changes, so that they would not be retroactively handled the next time the job for the profile you just created or changed was run.

You now know how to edit, remove, and create Overdue and Lost Loan Profiles. Thanks for watching!