Alma Administration – Fulfillment  
Patron and Loan Limits

Hello, Alma allows you to configure various limits including Patron and Loan Limits.

Patron Limits allow you to configure the maximum amount of fines, overdue items, requests, etc. that can be applied on their account before it is blocked, until the fines are paid.

Loan Limits limit the number of items that they can simultaneously check out. These limits are dependent on user group, location, material type, etc.

In this session you will learn how to configure Patron and Loan Limits.

You need to create new Patron and Loan Limits for High School students that will be using the university library. You’ll start by configuring the Patron Limits, you’ll go to Configuration > Fulfillment > Patron Configurations > Patron Limits. Here you can see a list of User groups that patrons can be assigned to and the limits for each, such as Graduate and Undergraduate students, Faculty, Guest, etc.

To add a new set of patron limits click Add Row. Since you need to create a new user group for High School students that will be using the university library, you'll select the High School Student user group and enter in the maximum amounts for each field you want to apply. If you leave any of the boxes blank, no limit will be applied to that area.

For more information about creating User Groups please see the corresponding session in the Alma Essentials training in the Knowledge Center.

To delete a row, click on the row action tool and select Delete.

When you’re done click Add Row… and then Save.

To limit the number of items a patron can check out simultaneously, you have to add a loan limit rule on the Loan Limit Rule page. In the Configuration menu you’ll go to Fulfillment > Patron Configurations > Loan Limits. Here you can see a list of all the current Loan Limit Rules. Please note that these rules can only be configured at the institution level.

Use the toggle button to enable or disable a rule. The arrow buttons allow you to move rules up and down, and will be assigned to patrons based on the first rule for which they meet the criteria.

When you click on the row action tool you have the option to Edit, Duplicate, or Delete. Click Edit to make any changes to a rule. In the editor you can add input parameters to define the circulation transactions to which this rule will apply.

The parameters can be based on one or more conditions relating to library, location, item policy, material type, and user group. In the Output Parameters you can change the Loan Limit that will apply when the conditions of Input Parameters that you just set are satisfied. Click Save if you made any changes.

To create a new rule, click Add Rule. You are required to enter a name, for this example you'll align it with the Patron Limit User Group you configured in the last step. Optionally, you can add a description if you’d like.

Now you’ll enter your parameters, select User Group, and locate the User Group you configured on the Patron Limits Mapping Table, in this case it's High School Students. Add any additional parameters as needed. In this case you need to set the Item Policy to 2 week loan, and then you’ll set the loan limit. Now any patron in the High School Students user group can only check out a maximum of 5 items with a two week loan limit.

When you’re done click Save.

Your new High School Students Loan Limit has been created with the High School Student Patron Limit user group applied as one of the parameters.

You now know how to configure Patron and Loan limits. Thanks for watching!