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| **Changing User Expiration Dates to be Able to Run the Job Bulk Change Due Dates** |  |



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The following explains how to update the expiry date of patrons specifically so that the new due date created in the job “Bulk Change Due Dates” will not be earlier than the new desired due date. The process is synchronized with the institution running the integration type “user” (SIS Load) to still maintain control over the expiration dates from an external source.

* This method was originally submitted by [Katie Utschig](mailto:Katie@switchinc.org) of the SWITCH Library Consortium to the [alma@exlibrisusers.org](mailto:alma@exlibrisusers.org) Alma users list on 22 Apr. 2020.
* The additions to see supporting presentations in the process were added by Ex Libris.

1. Use a fulfillment analytics report to identify the Primary ID of patrons with current active loans.
2. Create a set of those patrons in Manage Sets based on the Primary Identifier in the analytics report.
   1. See:
      1. [How to create a set of users with items on loan and expiration date in specific range using Alma Analytics](https://knowledge.exlibrisgroup.com/@api/deki/files/81980/How_to_create_a_set_of_users_with_items_on_loan_and_expiration_date_in_specific_range_using_Alma_Analytics.pptx)
      2. [How to create a set of all users that have an item on loan](https://knowledge.exlibrisgroup.com/@api/deki/files/80765/How_to_create_a_set_of_all_users_that_have_an_item_on_loan.pptx)
3. Used Update/Notify Users job to update the expiry date beyond the bulk change date.
   1. See:
      1. [How update the expiration date for a set of users](https://knowledge.exlibrisgroup.com/@api/deki/files/81981/How_update_the_expiration_date_for_a_set_of_users.pptx?revision=1)
4. Run the bulk change due date on each of the locations that had extant loans (needed to run by location because there were a few locations we were excluding from the due date change)
5. Use the fulfillment analytics report to confirm the total count of loans from each location had been successfully updated.
6. Confirm the following day that the expiration dates had been updated by the SIS load with no effect on the new due date.