Physical Fulfillment

A loan that meets all the conditions specified in Configuring physical fulfillment consists of configuring physical locations, request policies, terms of use, and fulfillment units.

A **fulfillment unit** is one or more physical locations within an institution that follow the same policies. Fulfillment units have **Terms of Use (TOU)** which define policies for patrons.

A sample workflow for configuring fulfillment units, policies, and Terms of Use is as follows:

1. **Create fulfillment and item policies** – See [Adding Fulfillment Policies](#). These policies are applied to an item: whether it is renewable, where it can be picked up, how long it can be checked out, the fine assessed if the item is lost, and so forth.

   Fulfillment policies are bundled into a Terms of Use, which are attached to one or more fulfillment units; the policies then apply to all items that match the fulfillment unit criteria.

   Item policies are attached to a particular item and override any conflicting fulfillment policies in that location.

2. **Create Terms of Use** – This is a group of fulfillment policies for the items in a group of locations or for all items requested by the users in a group. See [Adding a Set of Terms of Use](#).

3. **Create physical locations** – A physical location is an area within a library. See [Adding a Physical Location](#). You associate a physical location with a fulfillment unit and then the physical location inherits the fulfillment unit's policies. Each location can be assigned to only one fulfillment unit.

4. **Create fulfillment units** – Fulfillment units include one or more physical locations that follow the same policies. See [Adding a Fulfillment Unit](#) and [Editing a Fulfillment Unit](#). When creating or editing a fulfillment unit, you configure:
   - From which physical locations items in these locations can be requested (anywhere, another library only, nowhere, and so forth)
   - The Terms of Use that apply to:
     - Specific locations (desks) within the physical location
     - Items of specific material types
     - Items with specific item policies
     - Items undergoing specific process types
     - Users with specific roles
     - Users in specific user groups

See the following training videos on fulfillment units: [Fulfillment Units](#) (Alma Administration Certification session) and [Fulfillment Units](#) in the Essentials Training Kit.

Configuring Fulfillment Units

To configure fulfillment units, you must have one of the following roles:

- General System Administrator
- Fulfillment Administrator
You configure fulfillment units on the Fulfillment Units List page (Configuration Menu > Fulfillment > Physical Fulfillment > Fulfillment Units).

![Fulfillment Units List Page](image)

**Note**

Ensure that you are within the context of the institution/library whose fulfillment units you want to configure by selecting the required institution/library from the Configuring filter on the Fulfillment Configuration page.

It is recommended to configure fulfillment units on the institutional level. Institutional-level fulfillment units can include locations in any of the libraries within the institution. Library-level fulfillment units can include only those locations that are in the library for which the fulfillment unit is defined. Note that up to 1000 locations can be included in a fulfillment unit.

The following actions can be performed on this page:

- Adding a fulfillment unit (see Adding a Fulfillment Unit)
- Editing a fulfillment unit (see Editing a Fulfillment Unit)
- Duplicating a fulfillment unit (select Duplicate from the row actions list and edit the relevant fields)
- Deleting a fulfillment unit (select Delete from the row actions list)

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**Adding a Fulfillment Unit**

You can add a fulfillment unit to the institution or to a library.

**To add a fulfillment unit:**

1. On the Fulfillment Units List page (Configuration Menu > Fulfillment > Physical Fulfillment > Fulfillment Units), select Add Fulfillment Unit.

   **Note**

   To create a copy of an existing fulfillment unit, select Duplicate from the row actions list. Once you have copied the fulfillment unit, you can modify it as needed.

2. In the Add Fulfillment Unit dialog box, enter a code and name (both required) for the new fulfillment unit. Note that the code is limited to 10 characters.
3. Enter a description (optional) for the fulfillment unit.

4. From the **On shelf request policy** drop-down list, select an option to define the way in which an item can be requested when it is on the shelf:

   - **Request for pickup anywhere regardless of availability** – All pickup locations that are allowed according to the Pickup Locations policy are available, regardless of whether the item is on the shelf
   - **Request for pickup in different library only** – Removes the owning library from the list of available library pickup locations
   - **Request for pickup in different campus only** – Removes the owning campus from the list of available campus pickup locations
   - **No requesting from available holdings** – If an item from the holdings is available, all items from this holdings may not be requested for pickup at any pickup location. All items from other holdings are not impacted.
   - **No requesting** – If an item attached to this rule is available, it may not be requested for pickup at any pickup location.

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**Note**

The value selected in this field is limited by the **Pickup Locations** policy in the Request Terms of Use. For example, when **Pickup Locations = In Library**, if you select **Request for pickup anywhere regardless of availability**, items can be picked up only in the owning library; if you select **Request for pickup in different library only**, you have set an invalid configuration, since no pickup locations are available. In such a case,
5. Select **Add Fulfillment Unit** to close the dialog box. The new fulfillment unit appears on the Fulfillment Units List page.

6. After defining a new fulfillment unit, edit the fulfillment unit to specify which physical locations are associated with the fulfillment unit, and which Terms of Use are to be applied to the fulfillment unit. For details, see **Editing a Fulfillment Unit**.

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**Editing a Fulfillment Unit**

You can edit the following information about a fulfillment unit:

- **Fulfillment Unit Details** – The parameters configured when adding a fulfillment unit (see To edit fulfillment unit details in **Editing a Fulfillment Unit**).

- **Fulfillment Unit Locations** – The physical locations that are associated with the fulfillment unit. These are the locations to which the Terms of Use/policies referenced by the fulfillment unit rules are applied.

- **Fulfillment Unit Rules** – The Terms of Use to apply to the fulfillment unit.

For details on configuring rules for a Resource Sharing Library, see **Configuring Temporary Item Creation Rules**.

**To edit fulfillment unit details:**

1. On the Fulfillment Units List page (**Configuration Menu > Fulfillment > Physical Fulfillment > Fulfillment Units**), ensure that you are at the relevant library or institution (in the Configuring link) and select a code or select *Edit* from the row actions list of a fulfillment unit. The Edit Fulfillment Unit page appears.

![Edit Fulfillment Unit Page – Fulfillment Unit Details Tab](image)

2. In the **Fulfillment Unit Details** tab, edit the general fulfillment unit details as required. For information on the fields...
3. Select the **Fulfillment Unit Locations** tab. For details on configuring fulfillment unit locations, see [Configuring Physical Locations](#).

4. To attach an existing location to the fulfillment unit, select **Attach Existing Location**. The Physical Locations List page appears.

5. Select the existing locations that you want to attach to the fulfillment unit and select **Select** (you can select multiple locations). The locations are added to the list of locations that are attached to the fulfillment unit.

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**Note**

- A location cannot be associated with more than one fulfillment unit.
- It is possible to move a location from one fulfillment unit to another even if items from the location are currently on loan. Note that if associating the location with a different fulfillment unit results in a change of the applicable Terms of Use, the new Terms of Use is applied with the subsequent action relating to the loan (for example, renewal).
- Note that up to 1000 locations can be included in a fulfillment unit.

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6. To attach and add a new location, select **Attach New Location**. The Attach New Location dialog box appears.

![Attach New Location Dialog Box](image)

7. If you are editing an institution-level fulfillment unit, from the **Library** drop-down list, select the library that contains the
location to be associated with the fulfillment unit.

8. Enter a new code and new name for the new location (both fields are required), as well as a new external name, if applicable.

9. From the New type drop-down list, select from:
   - Closed – The location is accessible by library personnel only and is not accessible to patrons. A patron must place a request for an item, and the requested item is then retrieved by a library staff member and can be checked out by the patron.
   - Open – The location can be accessed by patrons, who can remove an item from the location and then check-out the item.
   - Remote storage – Similar to a closed location, except that the remote storage location is located off-site. Retrieving an item from a remote storage location may take longer than from a regular closed location.

10. Select Add to attach the location and add another location, or Add and Close to close the dialog box and attach the location to the fulfillment unit. The location is added to the list of locations that are attached to the fulfillment unit.

Note
To remove a location from the list of attached locations in the Fulfillment Unit Locations tab, select Remove for a location.

11. Select the Fulfillment Unit Rules tab. The Fulfillment Unit Rules tab page appears.

![Edit Fulfillment Unit Page – Fulfillment Unit Rules Tab](image)

12. In the Rule Type drop-down list, select one of the available rule types — Booking, Loan, or Request.

13. To add a new rule, select Add Rule. The Fulfillment Unit Rules Editor page appears.
14. In the **Fulfillment Unit Rules Editor** section, specify a name (required) and description (optional) for the rule.

15. In the **Input Parameters** section, specify the components of the input parameter (**Name**, **Operator**, and **Value**). A set of input parameters may appear, as follows:

   **Material Type** = DVD-ROM

   Possible **Name** values are:

   ◦ Item policy - Create a rule for items with specific item policies.
   ◦ Job category - Create a rule for users with specific roles.
   ◦ Location - Create a rule for locations (desks) within the named locations.
   ◦ Material type - Create a rule for items of specific material types.
   ◦ Process type - Create a rule for items undergoing specific process types.
   ◦ User group - Create a rule for users in specific user groups.
   ◦ Resource Sharing Partner - in Resource Sharing rules only - Create a rule for requests with specific partners.
   ◦ Request Format - in Borrowing Resource Sharing rules only - Create a rule for requests that have a specified format.

16. Select **Add Parameter**. The set of input parameters is added to the list of parameters for the fulfillment unit rule. All the parameters in the list must be satisfied for the output parameter to be applied (that is, a Boolean AND operator operates between fields). You can edit or delete rules.

17. In the **Output Parameters** section, specify the terms of use to be applied when the input parameters are met. Note that the list of available terms of use is determined dynamically, according to your previous selection of rule type. Select **TOU Details** to view the details of the Terms of Use that you select. For details on configuring terms of use, see [Configuring Terms of Use](#).

18. Select **Save** to store your changes to the fulfillment unit rule. The new rule appears in the list of rules in the **Fulfillment Unit Rules** tab.

19. If you have defined more than one rule for the fulfillment unit, in the **Fulfillment Unit Rules** tab, you can use the **Move Up** and **Move Down** arrows to set the order of the rules. Alma applies the first (and only the first) appropriate, enabled rule. If no appropriate rule is found, the system uses the default rule.
20. Select **Save** to store the fulfillment unit details. The new fulfillment unit appears in the list of fulfillment units on the Fulfillment Units List page.

In a collaborative network, you can create fulfillment units in the Network Zone and then distribute them to member institutions. The member institutions have view permission to the distributed records but are not able to edit or delete them. If an input parameter is selected in the Network Zone institution that does not exist in the member institution, the rule is not applied. When the Network Zone fulfillment unit has been distributed, the local rules contain two additional fields, **Use Rules from Network Fulfillment Unit** and **Use Network Rules First**.

**Use Rules from Network Fulfillment Unit** displays a drop down containing all of the fulfillment units that have been distributed from the Network Zone. Checking **Use Network Rules First** specifies that Alma will check the rules from the selected network fulfillment unit before processing the rules from the local fulfillment unit. When this checkbox is selected, Alma also considers the **On Shelf Request Policy** from the selected network fulfillment unit instead of the local **On Shelf Request Policy**. Additionally, the local fulfillment rule uses the network rule as the local default.

For more information, see [Configuring Fulfillment Information in the Network Zone](#).

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**Configuring Fulfillment Policies**

To configure fulfillment policies, you must have one of the following roles:

- General System Administrator
- Fulfillment Administrator

Fulfillment policies define the library service attributes and parameters that are imposed when a patron receives service from the library. For example, a fulfillment policy may determine when an item is loaned, the grace period when an item is returned late, or the fee that is due from a patron who loses an item on loan. Fulfillment policies are divided into policy types, such as **Due Date**, **Grace Period**, and **Lost Item Fine**. You can create a number of fulfillment policies for each type. When multiple fulfillment policies exist for a given type, you can specify the default.
Fulfillment policies are provided out-of-the-box and may be used by both institutions and libraries as long as the owner of the policy is defined as **Generic**. When the institution or a library wants to update a given policy, that policy applies to the organization level for which it was configured, and is inherited downward. For example, updating a policy at the institution level changes the policy owner to **Institution**. This policy may then be used by all libraries of the institution. Alternatively, a specific library may further configure the policy.

You configure fulfillment policies on the Policy Management page (**Configuration Menu > Fulfillment > Physical Fulfillment > Advanced Policy Configuration**).

You configure fulfillment policies on the Policy Management page (**Configuration Menu > Fulfillment > Physical Fulfillment > Advanced Policy Configuration**).

![Policy Management Page](image)

**Policy Management Page**

**Note**

Ensure that you are within the context of the institution/library whose policies you want to configure by selecting the required institution/library from the **Configuring** filter on the Fulfillment Configuration page.

The following actions can be performed on this page:

- Add a new fulfillment policy (see **Adding Fulfillment Policies**)
- Edit a fulfillment policy. Select **Edit** from the row actions list.
- View Terms of Use that use this policy. Select **Show related terms of use** from the row actions list.
- Duplicate a policy. Select **Duplicate** from the row actions list and edit the relevant fields.
- Delete a policy. Select **Delete** from the row actions list.

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**Adding Fulfillment Policies**

You can add a new fulfillment policy to a Terms of Use.

**To add new policies:**

1. On the Policy Management page (**Configuration Menu > Fulfillment > Physical Fulfillment > Advanced Policy Configuration**), select **Add Fulfillment Policy**. The Select Fulfillment Policy Type page appears, displaying a list of policies. This is the first page of a two-page wizard.
On the Select Fulfillment Policy Type page, select the policy type. In the following table, the indicated values appear on the second page of the wizard after you select the policy type on this page.

<table>
<thead>
<tr>
<th>Fulfillment Policy Type</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td>Booking:</td>
<td></td>
</tr>
<tr>
<td>Back to Back Booking</td>
<td>The minimum amount of time required between consecutive booking requests for the same resource &amp; requester. If <strong>Value type = None</strong> for this policy type, there is no minimum: a requester can book immediately after another booking. <strong>Values:</strong> None/Other. If you select Other, select a value and a unit of time measurement.</td>
</tr>
<tr>
<td>Booking Release Time</td>
<td>The amount of time after a booking request takes effect that the institution holds the resource for the requesting patron. No other patrons can borrow the resource until after the booking release time passes. If the booking release time passes and the requesting patron does not claim the resource, the booking request is still in effect but the resource can be loaned to another patron. <strong>Values:</strong> None/Other. If you select Other, select a value and a unit of time measurement.</td>
</tr>
<tr>
<td>Future Limit</td>
<td>How far in advance an item can be reserved through a booking request.</td>
</tr>
<tr>
<td>Fulfillment Policy Type</td>
<td>Description</td>
</tr>
<tr>
<td>------------------------</td>
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</tr>
<tr>
<td>Is Item Bookable</td>
<td>Whether booking is allowed. Values: True/False</td>
</tr>
<tr>
<td>Maximum Allowed Booking Length</td>
<td>The maximum permitted duration of the booking request. Values: None/Other. If you select Other, enter a value and a unit of time measurement.</td>
</tr>
<tr>
<td>Pickup Location</td>
<td>The locations where a patron can request to pick up a requested item. The available values are: - At Any Institution - At Any Reading Room - At Library Reading Room - In Campus - The campus to which the item's library belongs - In Institution - Includes all of an institution's libraries, not only those whose circulation desk has a Hold Shelf - In Library In Patron Affiliated Campus - The campus to which the patron belongs</td>
</tr>
<tr>
<td>Preview Period</td>
<td>The amount of time prior to the booking period that the requester can borrow the item. During this time frame, the resource is blocked from patrons other than the requester. Values: None/Other. If you select Other, enter a value and a unit of time measurement.</td>
</tr>
<tr>
<td>Purged Request Fee</td>
<td>A fee applied to an unfulfilled, expired booking request. By default, no fee is applied. If a request qualifies for the fee and is on the title level with multiple items having more than one terms of use that can be used, the lowest fee will be applied. Values: None/Other. If you select Other, enter a fee amount.</td>
</tr>
<tr>
<td>Booking Resolution</td>
<td>Allows you to define the allowed resolution of your booking request. The policy has four values: - Minutes - The booking will be defined by date, hour, and minutes. This is the default. - Hours - The booking will be defined by date and hour. - Days - The booking will be defined by date only. - Days plus overnight - The end time of the booking will be defined to the next opening time of the library. When a booking request is created in Alma or Primo, the start and end time fields are now dependent on the value in this policy. If the value is Minutes, time fields are displayed with hours and minutes. If the value is Days or Days plus overnight, the time fields are hidden. If the value is Hours, time fields are displayed with hours and minutes but a warning message indicates that only hours should be selected. If multiple items exist for the same title with different booking resolutions (due to different terms of use), the least specific resolution is used. See Creating Booking Requests.</td>
</tr>
<tr>
<td>Fulfillment Policy Type</td>
<td>Description</td>
</tr>
<tr>
<td>------------------------</td>
<td>-------------</td>
</tr>
<tr>
<td>Loan:</td>
<td></td>
</tr>
<tr>
<td>Block When Overdue</td>
<td>Whether to trigger a block on the user record when an overdue loan is returned. The block may be selected for a period of time depending on the time the loan is overdue (based on only open days or all days), or may be for a fixed time. By default, all activities are blocked, however blocks may also be applied specifically for loan, renew, and/or request. The block is automatically lifted once the configured expiry date passes, as part of the Users - Remove Blocks job. Values: None/Other. If you select Other, enter a value and a unit of time measurement.</td>
</tr>
</tbody>
</table>
| Canceled Recall Due Date | What happens to a loan's due date when a recall placed on the loan is canceled. The values are:  
  - Restore the original due date  
  - Keep the same recalled due date unchanged  
  - Attempt to renew the recalled loan using standard renew procedures  
For more information on recall requests, see Recall Requests. |
| Closed Library Due Date Management | How to manage fulfillment activities when the library is closed. The available values are:  
  - Keep – Keep the current due date and time  
  - Move backward – Move to the library closing time on the previous open day  
  - Move forward – Move to the library opening time on the next open day  
  - Move to the end of the next open day – Move to the library's closing time on the next open day (affects due dates that would otherwise fall on a day that the library is closed).  
  - Move to next open day (same hour) - The due date is set to the next open date with the original due date time.  
  - Move to previous open day (same hour) - The due date is set to the previous open date with the original due date time. |
| Direct Delivery Fee    | Currently under construction |
| Due Date               | The length of time the item may be borrowed. The values are:  
  - Fixed – Based on your institution’s calendar, the end of a term. Select a semester.  
  - Non Fixed – Based on the date the item was borrowed. Select a value and a unit of time measurement.  
If you set the Unit of Measurement field to Days, Month, or Week, you can also specify a specific time. If you |

**Note**

For this policy to function correctly, the overdue block type must be defined in the User Block Description code table. While it is defined by default, if it has been removed, this policy will not be applied. See Configuring User Blocks Due to Overdue Loans.

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**Note**

When a due time is specified as part of the Due Date policy, if the due date is an open day, the Closed Library Due Date Management policy is ignored. If the due date is not an open day, the Closed Library Due Date Management policy is applied.
### Fulfillment Policy Type | Description
--- | ---
<p>| <strong>Maximum Renew Date</strong> | The maximum amount of time after a lending request is sent that renewal of the request is permitted. Values: None/Other. If you select Other, enter a value and a unit of time measurement. For example, if the Maximum Renew Date policy has a value of 2 weeks, when using the Renew option on the lending side, the system blocks renewal if the due date after renewal is more than two weeks after the item was shipped. Additionally, if requests exist on an item which is being renewed, the renewal is rejected. If requests exist on the title that is being renewed, the renewal succeeds or is rejected based on the configured block preferences setting (see Configuring Block Preferences). |
| <strong>Resource Sharing Recall Period</strong> | The amount of time, in days, that a borrower has to return a recalled item. Values: None/Other. If you select Other, enter a value in days. For more information on recall requests, see Recall Requests. |
| <strong>Expiration Date Management</strong> | Currently under construction |
| <strong>Grace Period</strong> | The length of time that the item may be returned late with no fine being applied. If you define a grace period using the Days unit of measurement (as opposed to Exact Days or other units of measurement), the grace period is calculated from and including the item’s due date. For example, if the item’s due date is March 1 and the grace period is 2 days, the end of the grace period is March 3, after which a fine is applied (so that if you use the Days unit of measurement, a grace period of 1 day is essentially meaningless). If you use the Exact Days unit of measurement, if the item’s due date is March 1 and the grace period is 2 days, the end of the grace period is March 3. The grace period applies to both regularly loaned items and recalled items. |
| <strong>Note</strong> | If the grace period passes and the item is not returned, the fine is applied retroactively to the due date. |
| <strong>Values:</strong> None/Other. If you select Other, select a value and a unit of time measurement. |
| <strong>Is Loanable</strong> | Whether a patron can borrow the item. An item on loan cannot be renewed. Values: True/False, In Reading Room Only. If In Reading Room Only is selected, when loaning from a circulation desk not defined as a reading room desk, staff will receive a block message. The block can be configured in Alma Block Preferences to allow an override by Operator/Manager. The block is also applicable to loaning from a self-check machine. |
| <strong>Is Recallable</strong> | Whether the library can recall the item if the item is on loan. If this setting is True and Recalls Loans = No on the Loan Recalls (Request Configuration) mapping table, the loan is not recalled (see Configuring Loan Recall Requests). Only if Recalls Loans = Yes is the Terms of Use policy applied. |</p>
<table>
<thead>
<tr>
<th>Fulfillment Policy Type</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td>When recalling a single copy of an item, Alma recalls the item that has been on loan the longest (that is, the item with the earliest loan date). When a request that has triggered a recall is canceled, that original, corresponding recall will be canceled. When <strong>Is Recallable</strong> is selected and an item is recalled:</td>
<td></td>
</tr>
<tr>
<td>◦ The due date of the item is updated when the <strong>Recall Period</strong> policy value is active and is earlier than the current due date. For example, if the item’s due date is May 10 and an item is recalled on May 7 with a <strong>Recall Period</strong> value of 5 days, the item’s due date is effectively May 12 (5 days after the item was recalled). Note that the current due date will not change, and will remain May 10.</td>
<td></td>
</tr>
<tr>
<td>◦ The overdue fine is increased when the <strong>Recalled Overdue Fine</strong> policy value is active and is greater than the <strong>Overdue Fine</strong> policy value. For example, if the <strong>Overdue Fine</strong> value is $5 and the <strong>Recalled Overdue Fine</strong> value is $10, a recalled item that is overdue incurs a fine of $10 instead of $5.</td>
<td></td>
</tr>
</tbody>
</table>
| Values: True/False
For more information on recall requests, see [Recall Requests](#). |
<p>| <strong>Is Renewable</strong> | Whether a patron can renew the loan on the item. Values: True/False |
| <strong>Lost Item Fine</strong> | The amount to pay if the item is lost. Values: None/Other. If you select Other, enter an amount to pay in the local currency. |
| <strong>Lost Item Replacement Fee</strong> | This policy defines a replacement fee to apply when an item is lost. Values: None/Other. If you select Other, enter a value in the local currency. Replacement costs can be set per item and in this policy. The possible scenarios for the application of this policy are: |
| ◦ The item has a replacement fee and: |
| ▪ the policy is set to <strong>None</strong> – result: the item’s replacement fee is applied. |
| ▪ the policy is set to <strong>Other, Value</strong> is set to a value greater than zero – result: the item’s replacement fee is applied. |
| ▪ the policy is set to <strong>Other, Value</strong> is set to 0 – result: no fee is applied. |
| ◦ The item does NOT have a replacement fee and: |
| ▪ the policy is set to <strong>None</strong> – result: no fee is applied. |
| ▪ the policy is set to <strong>Other, Value</strong> is set to a value greater than zero – result: the policy fee is applied. |
| ▪ the policy is set to <strong>Other, Value</strong> is set to 0 – result: no fee is applied. |
| <strong>Lost Item Replacement Fee Refund Ratio</strong> | The percentage of the replacement fee that is returned to a patron when the patron returns a lost item for which a replacement fee was charged. Values: Enter a percentage value. |</p>
<table>
<thead>
<tr>
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</thead>
</table>
| Maximum Renewal Period   | The maximum amount of time for a loan. This value includes time added to the loan by renewals. Values: None/Other. If you select Other, enter a value and a unit of time measurement. For example, if this value is 21 days:  
  - An item on 14 day loan can be renewed for up to 7 days (14 + 7 = 21).  
  - An item on 10 day loan can be renewed for up to 11 days (10 + 11 = 21).  
  Note: If the Value type = None for this policy type, there is no limit to the loan renewal period. |
| Maximum Fine             | The maximum amount that a patron can be fined in overdue fines for each loan. Values: None/Other. If you select Other, enter the maximum fine for a patron in the local currency. If Value type = None, there is no limit on the amount that a patron can be fined. |
| Overdue Fine             | The amount that the patron must pay, per period, if the item was returned late. An item is considered overdue starting on the day after the due date. Values: None/Other. If you select Other, enter an amount to pay in the local currency for each time period, and the time period, as follows:  
  - **All Days** – All days in the given period.  
  - **All Hours** – All hours in the given period.  
  - **All Minutes** – All minutes in the given period.  
  - **Exact Calendaric Days** – All days in the given period from the same hour that the period started.  
  - **Exact Open Days** – All open days in the given period from the same hour that the period started.  
  - **Open Days** – All open days in the given period.  
  - **Open Hours** – All open hours in the given period. |
<p>| Overdue Notification Fine Type 1 | The amount the patron must pay for a &quot;Type 1&quot; overdue notification. See Configuring Overdue and Lost Loan Profiles. Values: None/Other. If you select Other, enter the amount to pay in the local currency. |
| Overdue Notification Fine Type 2 | The amount the patron must pay for a &quot;Type 2&quot; overdue notification. See Configuring Overdue and Lost Loan Profiles. Values: None/Other. If you select Other, enter the amount to pay in the local currency. |
| Overdue Notification Fine Type 3 | The amount the patron must pay for a &quot;Type 3&quot; overdue notification. See Configuring Overdue and Lost Loan Profiles. Values: None/Other. If you select Other, enter the amount to pay in the local currency. |
| Overdue Notification Fine Type 4 | The amount the patron must pay for a &quot;Type 4&quot; overdue notification. See Configuring Overdue and Lost Loan Profiles. Values: None/Other. If you select Other, enter the amount to pay in the local currency. |
| Overdue Notification Fine Type 5 | The amount the patron must pay for a &quot;Type 5&quot; overdue notification. See Configuring Overdue and Lost Loan Profiles. Values: None/Other. If you select Other, enter the amount to pay in the local currency. |</p>
<table>
<thead>
<tr>
<th>Fulfillment Policy Type</th>
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</tr>
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<tbody>
<tr>
<td>Recalled Overdue Fine</td>
<td>The amount that the patron must pay, per period, if a recalled item was returned late. When a placing a hold request, only the item that has been on loan the longest is recalled, while other items are blocked from renewal. If the recalled item is returned late, it is assigned a <strong>Recalled Overdue Fine</strong>, while other items due are assigned an <strong>Overdue Fine</strong>. Values: None/Other. If you select Other, enter a value and a unit of time measurement to define each period. For more information on recall requests, see <a href="#">Recall Requests</a>.</td>
</tr>
<tr>
<td>Recall Period</td>
<td>The amount of time that a patron has to return a recalled item. Values: None/Other. If you select Other, enter a value and a unit of time measurement. For more information on recall requests, see <a href="#">Recall Requests</a>.</td>
</tr>
<tr>
<td>Reloan Limit</td>
<td>Prevents reloaning items to a patron that has just returned the item. A different copy of the same title with the same material type is considered as a single item for this policy. The policy type has three possible options:  - None - there is no limit on borrowing copies of the same title. This is the prior functionality and the default.  - Parallel - the patron may not check out two copies of the title at one time.  - Other - you may define the time span (in the <strong>Unit of Measurement</strong>) in which the same item may not be reloaned - minutes, hours, days, weeks, or months. Note that this option includes the <strong>Parallel</strong> option and blocks both parallel loans and same item loans in the specified time span. There is no option to block reloaning without blocking parallel loans. For more information, see <a href="#">Loaning Items</a>.</td>
</tr>
<tr>
<td>Renew Fee</td>
<td>The amount that the patron must pay for renewing an item. Values: None/Other. If you select Other, enter a value in the local currency.</td>
</tr>
<tr>
<td>Requested Item Due Date</td>
<td>The length of time that the item may be borrowed (by default, two weeks) if the item is requested by another patron, when the item is not already on loan. Values: None/Other. If you select Other, enter a value and a unit of time measurement. For more information on recall requests, see <a href="#">Recall Requests</a>.</td>
</tr>
</tbody>
</table>

**Resource Sharing:**

<table>
<thead>
<tr>
<th>Allow Resource Sharing Requesting</th>
<th>Whether a patron can place a resource sharing borrowing request. Value: True/False</th>
</tr>
</thead>
<tbody>
<tr>
<td>Resource Sharing Receive Fee</td>
<td>A default fee that is applied to resource sharing requests. The fee is applied when an item is received and scanned. Values: None/Other. If you select Other, enter a value in the local currency.</td>
</tr>
<tr>
<td>Resource Sharing Request Fee</td>
<td>This fee may be applied at the time that a borrowing request is created. It may be applied on requests coming in</td>
</tr>
<tr>
<td>Fulfillment Policy Type</td>
<td>Description</td>
</tr>
<tr>
<td>------------------------</td>
<td>-------------</td>
</tr>
<tr>
<td></td>
<td>from external sources such as Primo requests or NCIP messages. Values: None/Other. If you select Other, enter a value in the local currency.</td>
</tr>
<tr>
<td>Is Requestable for Physical Resource Sharing</td>
<td>Whether a physical item can be requested to fulfill a resource sharing lending request. Values: True/False</td>
</tr>
<tr>
<td>Is Requestable for Digital Resource Sharing</td>
<td>Whether a digital item can be requested to fulfill a resource sharing lending request. Values: True/False</td>
</tr>
<tr>
<td>Active Resource Sharing Requests Limit</td>
<td>The maximum number of active resource sharing requests that a patron is allowed to have. The following request statuses will not be included when counting the number of requests for this policy: Completed, Canceled, Canceled by Patron, Cancel Requested, and Deleted. Active requests which were already returned from the patron to the library, but were not yet returned to the lender are ignored when calculating this limit. Values: None/Other. If you select Other, enter the maximum number of requests. If you select None, there is no limit to the number of requests.</td>
</tr>
<tr>
<td>Yearly Resource Sharing Requests Limit</td>
<td>The maximum number of resource sharing requests that a patron is allowed to have in a given year. Deleted requests are not considered in this count. The year is counted starting from the date that is configured in the rs_yearly_ill_limit_start_date parameter (See Configuring Other Settings). Values: None/Other. If you select Other, enter the maximum number of annual requests. If you select None, there is no limit to the number of requests.</td>
</tr>
<tr>
<td>Request:</td>
<td></td>
</tr>
<tr>
<td>Hold Shelf Period</td>
<td>The length of time that a requested item can remain on the hold shelf without being fulfilled. The Hold Shelf Period value does not include days that the library is closed. For example, if the Hold Shelf Period value is 5 days and the library is closed for 2 days during that period, the 2 days are not calculated as part of the Hold Shelf Period, and the item remains on the hold shelf for a total of 7 days (5 days on which the library is open and 2 days on which the library is closed). Values: Enter a number of days.</td>
</tr>
<tr>
<td>On Shelf Request Policy</td>
<td>The policy to use when on shelf items are requested. The available values are: Allow for pickup anywhere regardless of availability and Use fulfillment unit definition.</td>
</tr>
<tr>
<td>Is Digitizeable</td>
<td>Whether a patron can request a digital copy of the item. Values: True/False</td>
</tr>
<tr>
<td>Fulfillment Policy Type</td>
<td>Description</td>
</tr>
<tr>
<td>-------------------------</td>
<td>-------------</td>
</tr>
</tbody>
</table>
| Is Requestable          | Whether a patron can request to borrow the item.  
Values: True/False |
| Personal delivery       | Whether a patron can request personal delivery of the item. Values: select one of the following values to configure personal delivery:  
- **All** (Deliver items to a home or an office address)  
- **Home** (Deliver items only to a home address)  
- **None** (Do not deliver items at all)  
- **Office** (Deliver items only to an office address) |
| Note                    | A patron can request personal delivery only if he/she has defined a home/work address on the User Details page (see *Adding User Contact Information*) and there are no blocks on the user. |
| Personal delivery fee   | Whether a delivery fee is associated with the personal delivery of a physical item.  
Values: None/Other. If you select Other, enter the amount to pay in the local currency. |
| Automatically convert to resource sharing | Values: True/False. If this policy is set to True and the request is going to be canceled due to execution of either *Requests - Handle Expiration Step* or *Requests - Recalculate After Inventory Update*, the unfulfilled request is converted to a resource sharing request with a status of *Created borrowing request*.  
The policy is activated only if the above mentioned jobs are active and determine that a hold request must be canceled due to the expiry of an existing matching physical inventory that can fulfill the request.  
Before converting, the following validations are performed:  
- Pickup location is a circulation desk and not a library  
- Resource sharing library doesn't have a Deliver To relation with the pickup location  
- There is no default location for the resource sharing library  
- Date Needed By is in the past  
If any of these are true, the request is not converted. |
| Note                    | A cancelation letter with the reason *Converted to Resource Sharing Request* is sent to the patron when a hold request is converted to a resource sharing request. Existing requests are canceled with the cancelation reason *Converted to Resource Sharing Request*. |
| Pickup Locations        | The locations where a patron can request to pick up a requested item.  
The available values are:  
- **At Any Institution**  
- **At Any Reading Room**  
- **At Library Reading Room**  
- **In Campus - The campus to which the item's library belongs** |
<table>
<thead>
<tr>
<th>Fulfillment Policy Type</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td>◦ In Institution - Includes all of an institution's libraries, not only those whose circulation desk has a Hold Shelf ◦ In Library ◦ In Patron Affiliated Campus - The campus to which the patron belongs</td>
<td></td>
</tr>
</tbody>
</table>

| Request Priority | The priority of a user's request in the request queue. For details on request priority, see Request Priority. Values: Highest, High, Medium, Low, Lowest |

### User Registration:

<table>
<thead>
<tr>
<th>Card Renewal Fee</th>
<th>Amount to pay in local currency to renew a library card. This fee is applied when renewing the user record. Values: None/Other. If you select Other, enter the amount to pay in the local currency.</th>
</tr>
</thead>
<tbody>
<tr>
<td>Expiration Alert Period</td>
<td>The amount of time before the patron’s card expires that a patron is alerted. This relates to the expiration of the user record and not to the Patron role. Values: Enter a number of days.</td>
</tr>
<tr>
<td>Patron Role Renewal Period</td>
<td>The amount of time by which the role of Patron for this user is renewed. Values: None/Other. If you select Other, enter a value and a unit of time measurement.</td>
</tr>
<tr>
<td>Patron Registration Fee</td>
<td>The amount to pay in local currency to register a patron. This fee is applied upon creating a Patron role or renewing an existing Patron role. It is applied to both internal and external users. Values: None/Other. If you select Other, enter the amount to pay in the local currency.</td>
</tr>
<tr>
<td>Renew Scope</td>
<td>The scope in which a user’s Patron role can be renewed. Values: Institution/Library</td>
</tr>
<tr>
<td>User Registration Fee</td>
<td>The amount to pay in local currency to register a new user. This applies to an internal user only. The fee is applied only when registering the user from Manage Patron Services. Values: None/Other. If you select Other, enter the amount to pay in the local currency.</td>
</tr>
<tr>
<td>User Renewal Period</td>
<td>The amount of time by which a user’s registration is renewed (until the estimated date when the user is expected to leave the institution). Values: None/Other. If you select Other, enter a value and a unit of time measurement. For more information regarding authorization and authentication, see Expiration Date.</td>
</tr>
</tbody>
</table>

3. Select Next. The Policy Details page appears. This is the second page of the two-page wizard.
4. Enter a policy name (required) and policy description (optional).

Note
The due date policy’s description is what is shown in the Primo Get It tab’s item list. If no description is defined, the Get It tab displays the due date policy’s value and unit of measurement.

5. In the **Value** field, select the relevant value to indicate that the policy is to be active. The values of this field vary, depending on the specified policy type (see above).

6. In the **Default policy** field, specify **False** or **True** to indicate whether the new policy is the default policy for the policy type when multiple policies exist for a given policy type. Note that when you add a new set of terms of use, the default policies will be the default options in the policy drop-down lists. For details on configuring terms of use, see Configuring Terms of Use.

7. Select **Save**. The details of the policies are stored, and the policy is added to the list of policies.

Note

- Configured policies may override settings in other areas of Alma. For example, the **Is Renewable** policy value can override the value of the Patron Renewal setting when configuring a Workflow Profile.
- If you select **Edit** from the row actions list for a network policy (**Policy Owner = Network**), the policy is saved as an institution policy (**Policy Owner = Institution**). If you then select **Delete** from the row actions list for an institution policy that belongs to a network, the policy is deleted from the institution but is saved as a network policy (**Policy Owner = Network**).
- You cannot delete a Network Zone policy that has been linked at a member institution to an institution level Terms of Use, the policy. The Job Report page for failed records (select **View Failed Records** from the row actions list) displays the link, **Could not delete. Terms of Use are connected to this policy**. You can select the link to view the policy. The policy is modified from being a network policy to being an institution policy.
- When creating a network policy with a fixed value type (**Value Type = Fixed**), a value (event) can be selected only if the member institutions are configured with an event of the same name.
- The Alma interface must be set to English to add fulfillment policies.
Configuring Item Policies

To configure item policies, you must have one of the following roles:

- General System Administrator
- Fulfillment Administrator

Item policies create exception rules in the fulfillment unit rules so that specific items in a certain location will circulate differently than the typical items stored in this location. See Creating a Request.

You configure item policies on the Item Policy Code Table page (Configuration Menu > Fulfillment > Physical Fulfillment > Item Policy). You should define item policies on the institution level only; defining library-level item policies is strongly discouraged.

Modifying an item policy may have implications for several functional areas in Alma. Ensure that you properly coordinate any changes that you make.

![Item Policy Code Table Page]

In a collaborative network, you can create policies in the Network Zone and then distribute them to member institutions. For more information, see Configuring Fulfillment Information in the Network Zone.

**Note**

Ensure that you are within the context of the institution whose item policies you want to configure by selecting the required institution from the Configuring filter on the Fulfillment Configuration page.

**To add or edit a new item policy:**

Add an item code and description. See Code Tables.

**Note**

The Default value parameter is not supported in this table and should not be used. Similarly, the Move Up and Move Down buttons do not have an effect on the order in which the item policies are displayed in drop-down lists.
To configure an item policy so that all of the items associated with the policy are not available for resource sharing, see Configuring Item Policy Exceptions.

---

### Configuring Terms of Use

To configure terms of use, you must have one of the following roles:

- General System Administrator
- Fulfillment Administrator

Terms of Use (TOU) refers to a list of policies that define the institution/library commitment to the patron according to which a service will be provided or terminated. Terms of Use are associated with a specific type of fulfillment activity, such as a loan, a request, or user registration. For details on the policies that can be included in terms of use, see Configuring Fulfillment Policies.

The fulfillment unit rules determine which Terms of Use to employ when delivering a particular service to the patron. For details, see Configuring Fulfillment Units, Policies, and Terms of Use.

For information about viewing fulfillment rules that are associated with a Terms of Use, see the Navigate to Fulfillment Rules from Terms of Use video (1:58 mins).

If an item belongs to a location that does not have Terms of Use (for example, the location does not belong to any fulfillment unit), the system determines the Terms of Use based on the default policies.

An item’s Terms of Use is re-calculated each time an activity is performed on a loaned item (such as renewal). Therefore, any change in a policy, fulfillment rule, patron information, or item information has an immediate effect on a loan's or request's Terms of Use.

You configure Terms of Use on the Terms of Use Management page (Configuration Menu > Fulfillment > Physical Fulfillment > Terms of Use and Policies).
In a collaborative network, you can create terms of the use in the Network Zone and then distribute them to member institutions. For more information, see Configuring Fulfillment Information in the Network Zone.

---

**Note**

Ensure that you are within the context of the institution/library whose Terms of Use you want to configure by selecting the required institution/library from the **Configuring** filter on the Fulfillment Configuration page.

---

Select the Terms of Use **Name**, **Type**, or **Owner** headings to sort the list alphabetically — in ascending or descending order.

The following actions can be performed on this page:

- Add a set of Terms of Use (see Adding a Set of Terms of Use)
- Edit a set of Terms of Use (Select **Edit** from the row actions list.)
- View a set of Terms of Use (Select **View** from the row actions list.)
- Delete a set of Terms of Use (Select **Delete** from the row actions list.)
- View the fulfillment rules related to the Terms of Use (see Viewing Related Fulfillment Rules)

---

**Note**

- You can permanently delete a Terms of Use record only if the owner is the **Institution**. If the owner is **Generic**, you cannot delete the record.
- A Terms of Use in a fulfillment unit rule cannot be deleted.

---

**Adding a Set of Terms of Use**

You can add a new set of Terms of Use to the institution or to a library within the institution.

**To add a new set of terms of use:**

1. On the Terms of Use Management page (**Configuration Menu > Fulfillment > Physical Fulfillment > Terms of Use and Policies**), select **Add a Terms of Use**. The Select Fulfillment Terms of Use Type page appears. This is the first page of a three-page wizard.
2. Select the Terms of Use type:
   ◦ **Booking** – Aggregates a number of policy types that are required to allow reserving of material at a specific time
   ◦ **Borrowing Resource Sharing** – Aggregates a number of policy types that are related to resource sharing borrowing requests and fees
   ◦ **Lending Resource Sharing** – Aggregates a number of policy types that are required to allow lending of resource sharing material to take place
   ◦ **Loan** – Aggregates a number of policy types that are required to allow a loan to take place
   ◦ **Request** – Aggregates a number of policy types that are required to allow a request to take place
     For more information on the Alma requests flow, see the [Alma Requests Flow](#) video (1 hr 1:22 mins).
   ◦ **User registration** – Aggregates a number of policy types that are required to allow the registration of a user to take place

3. Select **Next**. The second page of the three-page wizard appears.
4. Enter a name for the Terms of Use (required) and a description (optional).

**Note**

The remaining options in the Terms of Use Details page are the policy types that are available for the Terms of Use type that you selected on the previous page of the wizard.

5. Select from the predefined drop-down lists to specify the policies for the new set of Terms of Use. Note that the policy options in the drop-down lists are the relevant policies that were defined. For details, see Configuring Fulfillment Policies.

For descriptions of the policies, see Fulfillment Policy Types in Adding Fulfillment Policies.

Values selected on this page for the specified Terms of Use override the values configured in Fulfillment Configuration.

- To add a new policy, select **Add** from the row actions list. For more information, see Adding Fulfillment Policies.
- To edit a policy, select **Edit** from the row actions list. For more information, see Configuring Terms of Use. Editing a policy changes the policy and makes the change in all Terms of Use already using this policy.
- To add a new policy that is a duplicate of the currently selected policy, select **Duplicate** from the row actions list. A new policy is created, attached to the current Terms of Use; you can then edit the new policy. For more information, see Configuring Terms of Use.

6. Select **Next**. The third page of the wizard appears.

   ![Terms of Use Confirmation](image)

   Terms of Use Management Page - Third Page of the Wizard

7. Review the details of the new terms of use. Select **Back** to make changes to the Terms of Use.

8. Select **Save** to store the details of the new set of Terms of Use. The new set of Terms of Use is added to the list. If necessary, use the available filter and search controls to locate the new Terms of Use in the list. For details on Terms of Use, see Configuring Terms of Use.
9. To view a Terms of Use record, select View from the row actions list. A page detailing the Terms of Use appears. Select Back to return to the Terms of Use Management page.

You can configure that a user registration terms of use is applied automatically to newly added users; see Configuring User Registration Rules.

To configure a Terms of Use and attach it to a fulfillment unit to support sending resource sharing items to a patron:

1. Create a Borrowing Resource Sharing Terms of Use which supports Personal Delivery, as described in Adding a Set of Terms of Use.
2. On the Fulfillment Units List page (Configuration Menu > Fulfillment > Physical Fulfillment > Fulfillment Units), select the Change Organization Unit link.

3. Locate the Resource Sharing Library entry and select Choose from the row actions list. The Fulfillment Units List page displays the fulfillment units associated with the resource sharing library.
4. Select Edit from the row actions list of a fulfillment unit. The Edit Fulfillment Unit page appears.
5. Select the Fulfillment Unit Rules tab.
6. In the Rule Type field, select Borrowing Resource Sharing to display the resource sharing borrowing rules.
7. Select **Add Rule**. The Fulfillment Unit Rules Editor page appears.

8. Configure a rule, adding the Terms of Use you configured above.

9. Select **Save**. The Fulfillment Units List page displays the fulfillment unit with the updated rule.

**Note**

For a patron to be able to request resource sharing items for pickup at a personal delivery address, the patron must have a home or work address defined. A patron’s address type is configured on the patron’s User Details page (Admin > User Management > Manage Users). Select the **Contact** tab and add an address in the **Addresses** section (see [Managing Users](#)).

---

**Viewing Related Fulfillment Rules**

You can view the fulfillment rules that are associated with a specific Terms of Use.

**To view the fulfillment rules associated with a specific Terms of Use:**

1. On the Terms of Use Management Page (Configuration Menu > Fulfillment > Physical Fulfillment > Terms of Use and Policies), select **Show Related Fulfillment Rules** from the row actions list. The Related Fulfillment Rules page appears.

**Related Fulfillment Rules Page**

The fulfillment rules that are using the selected Terms of Use appear in the table.
2. Optionally, you can do the following:
   ◦ Select the link in the **Rule Name** column to open the Fulfillment Unit Rules Editor page for the selected rule.

   ![Fulfillment Unit Rules Editor Page]

   ◦ Select the link in the **Fulfillment Unit** column to open the Edit Fulfillment Unit page for the selected fulfillment unit.

   ![Edit Fulfillment Unit Page]

**Configuring Request Priorities**

When a physical item request is made for a non-available item, automatic prioritization may be established to assign a higher queue location to higher priority users.

**To configure request priorities:**
1. Create a request Terms of Use ([Configuration Menu > Fulfillment > Physical Fulfillment > Terms of Use and Policies](#)).

2. Locate the Request Priority policy.

3. Select Highest policy (or create one) from the Request Priority drop-down and save the Terms of Use.

4. From the Fulfillment Units list ([Configuration Menu > Fulfillment > Physical Fulfillment > Fulfillment Units](#)), add or edit an existing fulfillment unit.

5. Select the Fulfillment Unit Rules tab.

6. Select Add Rule

7. In the Input Parameters section, Select Add Parameter. Select the user group that will get highest priority.

8. In the Output Parameters section, select the terms of use created in step 3.

---

### Configuring Block Preferences

To configure block preferences, you must have one of the following roles:

- General System Administrator
- Fulfillment Administrator

Block preferences let you control how various scenarios are handled at circulation desks within the institution based on an item’s or user’s status. For more information on blocking users, see [Blocking and Unblocking Users](#). When an item is blocked it can't be loaned to the user; see [Creating a Request from the Institution](#).

A typical scenario may be as follows:

A patron brings a book to a circulation desk and attempts to borrow the book. When the circulation desk operator enters the book’s ID into the system, it is discovered that the book was requested by another patron, preventing the user from borrowing it. Depending on the block preferences and the staff member’s permissions, the block may be overridden.

The block preferences that are defined for the institution appear on the Workbench Preferences page ([Configuration Menu > Fulfillment > Physical Fulfillment > Block Preferences](#)).
The list of block preferences is predefined. You cannot add or delete a block preference, but you can modify a block preference's settings. You set the block preferences at the institution level. The preferences that you set apply to all libraries within the institution.

**Editing Block Preferences**

The details that you can modify are configured with the following fields on the Workbench Preferences page:

- **Actions** – Defines the global action to perform in a given scenario
- **Handlers** – Defines the action to perform automatically when the Action field is set to Handle Automatically or one of the Override by options

**Note**

Handlers can be edited only when there is more than one option to choose from for an action.

- **Blocks** – Defines which types of transactions to block (Loan, Renew, or Both)

The available actions are:

- **Block** – The item is blocked and the patron cannot borrow the item.
- **Override by Manager** – The block on the item can be overridden only by a staff member with the Circulation Desk Manager role at the current circulation desk.
- **Override by Operator** – The block on the item can be overridden only by a staff member with the Circulation Desk Manager or Circulation Desk Operator role at the current circulation desk.
- **Override by All** – The block on the item can be overridden by any staff member with either the Circulation Desk Manager, Circulation Desk Operator, or Circulation Desk Operator–Limited role at the current circulation desk.
- **Override in Another Institution** - This option may be used by Fulfillment Network members to configure whether the block may be overridden by staff in another institution if the block happens when the member’s item is being loaned at the circulation desk of another member institution.
- **Handle Automatically** – Specific actions are to be performed by Alma. These actions are specified in the Handler.
field, and are predefined by Ex Libris. Handler options can be configured only if you select **Handle Automatically** or one of the **Override by** options.

**Note**

- The block preferences **Item has not been received by Acquisitions Department, Item cannot be loaned due to booking request, Item cannot be loaned to patron - insufficient due date, A resource sharing request must be renewed by the resource sharing library, and Item does not belong to this institution** contain only a single Action (**Block**), which cannot be overridden.
- The block preference **Not Renewable - Item has Requests** is relevant only if **PATRON_PHYSICAL = Yes** on the Loan Recalls Mapping Table page (see [Configuring Loan Recall Requests](#)).
- When working with external users, the block preference **Patron is Expired** indicates that the patron has expired in the external system, and the block preference **Patron is not Active** indicates that the patron is not active in the external system.
- When selecting **Item cannot be loaned from this circulation desk, Item cannot be returned at this circulation desk, or Not Renewable – Item has Requests**, no Handler options are available when **Handle automatically** is selected. In these cases, Alma ignores the block and the item is loanable.
- Selecting an override action for the **Item is Not Renewable** preference causes the **Override** button to appear on the warning box from the **Renew** option on the **Action** button of the **Manage Patron Services Loan** tab. It does not affect the **Renew Selected** or **Renew All** buttons.

The block preferences descriptions are:

<table>
<thead>
<tr>
<th>Block Name</th>
<th>Description</th>
<th>Available Actions</th>
<th>Handlers</th>
</tr>
</thead>
<tbody>
<tr>
<td>The loan regular due date conflicts with booking request</td>
<td>Check out is blocked when the normal due date (as determined by the TOU, for example) conflicts with the start of an existing booking request.</td>
<td>• Block</td>
<td>Shorten the due date to the last possible date</td>
</tr>
<tr>
<td></td>
<td></td>
<td>• Override by All</td>
<td></td>
</tr>
<tr>
<td></td>
<td></td>
<td>• Override by Manager</td>
<td></td>
</tr>
<tr>
<td></td>
<td></td>
<td>• Override by Operator</td>
<td></td>
</tr>
<tr>
<td></td>
<td></td>
<td>• Handle Automatically</td>
<td></td>
</tr>
<tr>
<td>The renew due date conflicts with booking request</td>
<td>Renewal of an existing loan is blocked when the normal renewed due date (as determined by the TOU, for example) conflicts with the start of an existing booking request.</td>
<td>• Block</td>
<td>Shorten the due date to the last possible date</td>
</tr>
<tr>
<td></td>
<td></td>
<td>• Override by All</td>
<td></td>
</tr>
<tr>
<td></td>
<td></td>
<td>• Override by Manager</td>
<td></td>
</tr>
<tr>
<td></td>
<td></td>
<td>• Override by Operator</td>
<td></td>
</tr>
<tr>
<td></td>
<td></td>
<td>• Handle Automatically</td>
<td></td>
</tr>
<tr>
<td>Block Name</td>
<td>Description</td>
<td>Available Actions</td>
<td>Handlers</td>
</tr>
<tr>
<td>------------------------------------------------</td>
<td>-------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------</td>
<td>----------------------------------------------------------------------------------</td>
<td>----------------------------------------------</td>
</tr>
<tr>
<td>Item is not loanable</td>
<td>Check out of an item is blocked as a result of the fulfillment configuration – the applicable Terms of Use contains an Is Loanable policy with value False.</td>
<td>• Block</td>
<td>• Block</td>
</tr>
<tr>
<td></td>
<td></td>
<td>• Override by All</td>
<td>• Override by All</td>
</tr>
<tr>
<td></td>
<td></td>
<td>• Override by Manager</td>
<td>• Override by Manager</td>
</tr>
<tr>
<td></td>
<td></td>
<td>• Override by Operator</td>
<td>• Override by Operator</td>
</tr>
<tr>
<td>Item is not renewable</td>
<td>Loan renewal is blocked as a result of the fulfillment configuration – the applicable Terms of Use contains an Is Renewable policy with value False.</td>
<td>• Block</td>
<td>• Block</td>
</tr>
<tr>
<td></td>
<td></td>
<td>• Override by All</td>
<td>• Override by All</td>
</tr>
<tr>
<td></td>
<td></td>
<td>• Override by Manager</td>
<td>• Override by Manager</td>
</tr>
<tr>
<td></td>
<td></td>
<td>• Override by Operator</td>
<td>• Override by Operator</td>
</tr>
<tr>
<td>Item cannot be loaned to patron - insufficient due date</td>
<td></td>
<td>Block</td>
<td>Block</td>
</tr>
<tr>
<td>This item can only be loaned from reading room desk</td>
<td>If an item's Is Loanable policy has a value of In Reading Room Only, and the loan is attempted from a circulation desk not defined as a reading room desk, check out is blocked.</td>
<td>• Block</td>
<td>• Block</td>
</tr>
<tr>
<td></td>
<td></td>
<td>• Override by All</td>
<td>• Override by All</td>
</tr>
<tr>
<td></td>
<td></td>
<td>• Override by Manager</td>
<td>• Override by Manager</td>
</tr>
<tr>
<td></td>
<td></td>
<td>• Override by Operator</td>
<td>• Override by Operator</td>
</tr>
<tr>
<td>Item does not belong to this institution</td>
<td></td>
<td>Block</td>
<td>Block</td>
</tr>
<tr>
<td>Item is on Hold Shelf for this patron</td>
<td>Check out is blocked for an item when the item is on the hold shelf.</td>
<td>• Block</td>
<td>• Block</td>
</tr>
<tr>
<td></td>
<td></td>
<td>• Override by All</td>
<td>• Override by All</td>
</tr>
<tr>
<td></td>
<td></td>
<td>• Override by Manager</td>
<td>• Override by Manager</td>
</tr>
<tr>
<td></td>
<td></td>
<td>• Override by Operator</td>
<td>• Override by Operator</td>
</tr>
<tr>
<td>Item is bound to a borrowing request for another patron</td>
<td>Check out is blocked for an item that were received for a borrowing request and then returned.</td>
<td>• Block</td>
<td>• Block</td>
</tr>
<tr>
<td></td>
<td></td>
<td>• Override by All</td>
<td>• Override by All</td>
</tr>
<tr>
<td>Block Name</td>
<td>Description</td>
<td>Available Actions</td>
<td>Handlers</td>
</tr>
<tr>
<td>------------------------------------------------</td>
<td>---------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------</td>
<td>----------------------------------------------------------------------------------</td>
<td>---------------------------------------------------------------------------------------------</td>
</tr>
<tr>
<td>Item cannot be loaned due to booking request</td>
<td></td>
<td>All</td>
<td>• Override by Manager • Override by Operator</td>
</tr>
<tr>
<td>Item has not been received by Acquisitions Department</td>
<td></td>
<td>Block</td>
<td></td>
</tr>
<tr>
<td>Item is requested by another patron</td>
<td>Check out of an item to a patron is blocked when there is an active request for the item by another patron. The block has no effect if the request is not active.</td>
<td>• Block • Override by All • Override by Manager • Override by Operator • Handle Automatically</td>
<td></td>
</tr>
<tr>
<td>Item renew period exceeded</td>
<td>Renewal of a loan is blocked as a result of the fulfillment configuration. The applicable Terms of Use contains a value for the Maximum Renewal Period policy which has already been reached for this loan.</td>
<td>• Block • Override by All • Override by Manager • Override by Operator</td>
<td></td>
</tr>
<tr>
<td>Item cannot be loaned from this circulation desk</td>
<td>• blocks loan of an item from the circulation desk of the item’s current location because the circulation desk does not provide check-out services for that location.</td>
<td>• Block • Override by All • Override by Manager • Override by Operator • Handle Automatically</td>
<td></td>
</tr>
<tr>
<td></td>
<td>• blocks loan of an item from the circulation desk(s) of a library that does not have a Circulate For relationship with the library of the item’s current location.</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Block Name</td>
<td>Description</td>
<td>Available Actions</td>
<td>Handlers</td>
</tr>
<tr>
<td>---------------------------------------------------------</td>
<td>-----------------------------------------------------------------------------</td>
<td>---------------------------------</td>
<td>--------------------------------------------------------------</td>
</tr>
</tbody>
</table>
| Item cannot be returned at this circulation desk        | • blocks return of an item at the circulation desk of the item’s current location because the circulation desk does not provide check-in services for that location.  
• blocks return of an item at the circulation desk(s) of a library that does not have a Circulate For relationship with the library of the item’s current location. | • Block                        | • Block                                                      |
<p>|                                                         |                                                                             | • Override by All               | • Override by All                                           |
|                                                         |                                                                             | • Override by Manager           | • Override by Manager                                       |
|                                                         |                                                                             | • Override by Operator          | • Override by Operator                                       |
|                                                         |                                                                             | • Handle Automatically         | Restart the request, since the item is no longer available  |
| The loan cannot be renewed due to the loan status       | Renewal of a loan is blocked when the loan status is Lost, Claimed Returned, or Recalled. Note that blocks for lost items cannot be overridden. | • Block                        | • Block                                                      |
|                                                         |                                                                             | • Override by All               | • Override by All                                           |
|                                                         |                                                                             | • Override by Manager           | • Override by Manager                                       |
|                                                         |                                                                             | • Override by Operator          | • Override by Operator                                       |
| Item is on hold shelf for another patron                | Check out is blocked for an item that is currently on the hold shelf for a different patron. | • Block                        | • Block                                                      |
|                                                         |                                                                             | • Override by All               | • Override by All                                           |
|                                                         |                                                                             | • Override by Manager           | • Override by Manager                                       |
|                                                         |                                                                             | • Override by Operator          | • Override by Operator                                       |
|                                                         |                                                                             | • Handle Automatically         | Restart the request, since the item is no longer available  |
| Patron cash limits has exceeded                         | Loaning and/or renewing an item is blocked for a patron with a current bill that exceeds the allowed limit for that patron group (as configured in the Users tab). Select the desired action(s) to block from the Blocks column: Loan, Renew, or Both. | • Block                        | • Block                                                      |
|                                                         |                                                                             | • Override by All               | • Override by All                                           |
|                                                         |                                                                             | • Override by Manager           | • Override by Manager                                       |
|                                                         |                                                                             | • Override by Operator          | • Override by Operator                                       |
| Patron's card has expired                               | Loaning an item is blocked for a patron with an expired user record.        | • Block                        | • Block                                                      |
|                                                         |                                                                             | • Override by All               | • Override by All                                           |
|                                                         |                                                                             | • Override by Manager           | • Override by Manager                                       |
|                                                         |                                                                             | • Override by Operator          | • Override by Operator                                       |</p>
<table>
<thead>
<tr>
<th>Block Name</th>
<th>Description</th>
<th>Available Actions</th>
<th>Handlers</th>
</tr>
</thead>
<tbody>
<tr>
<td>Patron is not active</td>
<td>Loaning an item is blocked for a patron with an inactive user record.</td>
<td>• Block&lt;br&gt;• Override by All&lt;br&gt;• Override by Manager&lt;br&gt;• Override by Operator</td>
<td>Operator</td>
</tr>
<tr>
<td>Patron loan limit exceeded</td>
<td>Loaning an item is blocked for a patron with current loans that exceed the allowed number for that patron group (as configured in the Users tab).</td>
<td>• Block&lt;br&gt;• Override by All&lt;br&gt;• Override by Manager&lt;br&gt;• Override by Operator</td>
<td>Operator</td>
</tr>
<tr>
<td>Patron overdue limits exceeded</td>
<td>Loaning and/or renewing an item is blocked for a patron with overdue loans that exceed the allowed number for that patron group (as configured in the Users tab). Select the desired action(s) to block from the Blocks column: Loan, Renew, or Both.</td>
<td>• Block&lt;br&gt;• Override by All&lt;br&gt;• Override by Manager&lt;br&gt;• Override by Operator</td>
<td>Operator</td>
</tr>
<tr>
<td>Patron overdue recalls limit exceeded</td>
<td>blocks loaning and/or renewing an item to a patron with overdue recalled loans that exceed the allowed number for that patron group (as configured in the Users tab). Select the desired action(s) to block from the Blocks column: Loan, Renew, or Both.</td>
<td>• Block&lt;br&gt;• Override by All&lt;br&gt;• Override by Manager&lt;br&gt;• Override by Operator</td>
<td>Operator</td>
</tr>
<tr>
<td>Not Renewable – Item has Request(s)</td>
<td>blocks renewal of additional copies of an item that has been recalled.</td>
<td>• Block&lt;br&gt;• Override by All&lt;br&gt;• Override by Manager&lt;br&gt;• Override by Operator</td>
<td>Operator</td>
</tr>
<tr>
<td>Block Name</td>
<td>Description</td>
<td>Available Actions</td>
<td>Handlers</td>
</tr>
<tr>
<td>---------------------------------------------------------------------------</td>
<td>-----------------------------------------------------------------------------------------------</td>
<td>--------------------------------------------------------------------------------------</td>
<td>---------------------------------------------------------------------------------------------------</td>
</tr>
<tr>
<td>Item is currently on loan by another patron</td>
<td></td>
<td>• Handle Automatically</td>
<td>Return the item and loan to the new patron</td>
</tr>
<tr>
<td>A resource sharing request must be renewed by the resource sharing library</td>
<td></td>
<td></td>
<td>Block</td>
</tr>
<tr>
<td>Item has not been received by resource sharing operator</td>
<td></td>
<td>• Block</td>
<td>Perform automatic resource sharing receive</td>
</tr>
<tr>
<td>User does not have a patron role or the role has expired</td>
<td></td>
<td>• Block</td>
<td></td>
</tr>
</tbody>
</table>

The Workbench Preferences page contains the following similar settings:

- **The loan cannot be renewed due to the loan status** – Used when an item’s status is *Lost, Claimed Returned,* or *Recalled.*

- **Not Renewable - Item has Request(s)** – When multiple copies of an item are checked out and a recall request recalls only one of the items, the other items that have not been recalled cannot be renewed.
To edit the details of a block preference:

1. On the Workbench Preferences page (Configuration Menu > Fulfillment > Physical Fulfillment > Block Preferences), locate the block preference that you want to edit.

2. In the Actions column, select a different action, as needed. The lists of available actions are predefined, and vary from scenario to scenario. Note that many scenarios have only one action, Block.

3. In the Handlers column, select a different handler, as needed. The lists of available handlers are predefined, and vary from scenario to scenario. Note that not all scenarios have handler options. A handler is displayed only if the Handle automatically action or one of the Override by actions is selected.

4. In the Blocks column, select the type of transactions that you want to block (Loan, Renew, or Both). Note that many scenarios do not allow this option and blocks apply to both loans and renewals.

5. Select Save to store the modified block preferences in the system.

Configuring Automatic Loan Renewal Rules

To configure automatic loan renewal rules, you must have one of the following roles:

- General System Administrator
- Fulfillment Administrator

Automatic loan renewal rules define the conditions under which items are renewed by the Notifications - Send Courtesy Notices and Handle Loan Renewals job. Also see the parameter auto_renew_loan_days (see Configuring Other Settings), which sets the number of days before a loan is due that an automatic renewal attempt triggers.

The Notifications - Send Courtesy Notices and Handle Loan Renewals job attempts to renew loans according to the defined auto-renewal rules. Whether the loan is successfully renewed depends on additional conditions, such as the terms of use and existing recalls.

Renewal may be prevented due to reasons such as:

- The user does not have a patron role or the role has expired.
- The user record will expire before the renewal date.
- The due date is already set to the renewed due date.
- The patron is inactive.
- The patron’s card has expired.
- The patron has exceeded the limit of overdue recalls.
- The patron has exceeded the limit of cash.
- The item is not renewable.
- The item has a status that prevents renewal.
- The item renew period has been exceeded.
- Renewing the loan conflicts with a booking request and the due date must be shortened.
- The item cannot be loaned due to a booking request.
- The item cannot be renewed due to a request for the item.
- The auto-renewal rule is set to false.
- A general error caused the renewal failure.
Loans that are not renewed because of pending requests are automatically renewed when the blocking requests are canceled or fulfilled by another item, if library policies and the patron status allow for the renewal to take place. Loans that are a result of resource sharing borrowing requests cannot be renewed using this job.

If a loan was handled by this job but renewal was prevented due to one of the other reasons mentioned above, it is not included in future instances of the **Notifications - Send Courtesy Notices and Handle Loan Renewals** job, unless its due date has changed.

For details, see **Notifications – Send Courtesy Notices and Handle Loan Renewals**.

You configure automatic loan renewal rules from the Automatic Loan Renewal Rules page (**Configuration Menu > Fulfillment > Physical Fulfillment > Auto Loan Renewal Rules**).

The following actions can be performed on this page:

- **Add automatic loan renewal rules** (see **Adding Automatic Loan Renewal Rules**)
- **Edit automatic loan renewal rules** (select **Edit** from the row actions list).
- **Enable or disable loan renewal rules**
- **Duplicate automatic loan renewal rules** (select **Duplicate** from the row actions list and modify the relevant fields)
- **Delete automatic loan renewal rules** (select **Delete** from the row actions list).

You cannot delete or disable the default automatic loan renewal rule.

### Adding Automatic Loan Renewal Rules

You can add new automatic loan renewal rules definitions to the institution. These are applied to all the libraries within the institution.

Alternatively, select **Duplicate** in the row actions list to duplicate an existing rule and then edit it (see **Editing Automatic Loan Renewal Rules**).
To add a new automatic loan renewal rule:


2. Enter a name (required) and a description (optional) for the new rule.

3. In the Input Parameters section, select Add Parameter. Specify the components of the input parameter (Item owner = library of the item which is loaned; User group = user group of the patron who has the item on loan), and select the required Operator. A set of input parameters may look like this: Item owner = Art Library; User group = Graduate student. In this case, the auto renewal rule would apply only for Art Library items on loan to graduate students. The set of input parameters is added to the list of parameters for the automatic loan renewal rule.

4. Repeat the previous step to add all the required parameters for the rule.

```
Note
All the input parameters must be fulfilled for the rule to be applied. If they are not, the default rule is applied.
```

5. Under Output Parameters, select whether auto renewal will be applied (True) or will not be applied (False).

6. Select Save to store the new rule.

7. If you have defined more than one rule, on the Automatic Loan Renewal Rules page, use the Move Up and Move Down arrows to set the order of the rules. The order of the rules is relevant in that the system applies the first (and only the first) appropriate, enabled rule. If no appropriate rule is found, the system uses the default rule.

---

Configuring Overdue and Lost Loan Profiles

To configure overdue and lost loan profiles, you must have one of the following roles:

- General System Administrator
- Fulfillment Administrator

The overdue and lost loan profiles monitor long overdue loans and turn them into lost loans when applicable. The profiles send progressive reminders to the patron as well as creating fees and user blocks. The profile setup allows for flexibility to apply the rules based on type of loan and the amount of time that the loan is overdue. The notifications may be configured, with up to five different letters able to be easily created within the profile. If the profile is set to create a fine, the amount for the fine is set by the profile type and the applicable Terms of Use policy.

The profiles may be configured with one or more of the following options:

- Execution is based on the number of days after either the due date or a specific status change.
- Loans may be selected by particular statuses, materials, or location types.
- Notifications sent are determined by the letter send format.
- Up to five notification types can be sent out by default, though more can be created if necessary.

For more information on use cases and configuration options for overdue and lost loans, see the Alma Matters session on Lost and Overdue Loans.

You can configure the criteria according to which Alma:

- Sends a warning to a patron that he or she has an overdue loan
• Marks overdue loans as lost

You configure these criteria and their associated actions using profiles. Alma runs a daily job (Loans - Overdue and Lost Item) to process overdue and lost loans, which, according to the list of profiles, determines the loans for which warnings are sent and those that are defined as lost.

A single notification is sent to a patron for each overdue profile that matches the defined criteria, listing all of the overdue items. For example:

• Notification Profile 1 sends a notification message for all items that are 3 days overdue.
• Notification Profile 2 sends a notification message for all items that are 5 days overdue.

The letter sent depends on the setting of the switch_to_overdue_and_lost_loan_new_job parameter. When set to true, the notification sent is the Ful Overdue and Lost Loan Notification letter (letter code: FulOverdueAndLostLoanNotificationLetter). When set to false, the notification sent is the Ful Lost Loan Letter (letter code: FulLostLoanLetter).

An invoice letter, Ful Overdue and Lost Loan letter (letter code: FulOverdueAndLostLoanLetter) is sent to a patron for the lost profile that matches the defined criteria, listing all lost items.

To configure these letters, see Configuring Alma Letters.

If the Loans - Overdue and Lost Item job runs every day, the notification is sent after 3 days and again after 5 days (once for each matching profile).

---

Note

Configuring these letters may require the use of IF statements in the XSL for each of the notification types. For more information, see the Example Letter Customization: Borrowing Activity Letter.

---

The switch_to_overdue_and_lost_loan_new_job user parameter determines which letter is sent to the patron. Additionally, the parameter must be set to True for user blocks to be applied. For more information, see Configuring Other Settings.

You configure overdue and lost loan profiles on the Overdue and Lost Loan Profile List page (Configuration Menu > Fulfillment > Physical Fulfillment > Overdue and Lost Loan Profile).

---

Note

Overdue and lost loan profiles can be configured at the institution level only.

---

The following actions can be performed on this page:
• Add an Overdue and Lost Loan Profile (see Adding an Overdue and Lost Loan Profile).
• Add an Overdue and Lost Loan Notification Profile (see Adding an Overdue and Lost Loan Notification).
• Edit a profile (select Edit from the row actions list).
• Duplicate a profile (select Duplicate from the row actions list and modify the relevant fields).
• Delete a profile (select Delete from the row actions list).
• Run a profile (select Run Now from the row actions list) to create the overdue or lost loan notifications on demand.
• Run a status update (select Status Update from the row actions list). This process runs the profile without sending a notification and without applying fees or blocks. This is used during a migration to Alma or if adding a new Overdue and Lost Loan Profile. The status update will not mark any loans as lost. In the case of a migration where notifications were sent from another system, the affected loans will be marked to prevent them from getting the same notifications a second time when the job runs again. For example, if you create a new rule that sends a notice to loans that are 3 days overdue, the new profile will catch all loans that are already 3 or more days overdue, including loans that may be 30 days overdue. To prevent that, and make sure the profile sends notices only for loans that become 3 days overdue after the profile has been created, use this option when defining the new profile.
• Enable or disable overdue and lost loan profiles.

Learn about adding overdue and lost loan profiles and notifications in the Enhancements to the Overdue and Lost Loan Profile video (5:10 mins).

Adding an Overdue and Lost Loan Notification

You can add overdue and lost loan warning profiles to an institution. These profiles determine the criteria by which the system sends overdue warnings for loans. The warnings do not affect the loan status; they inform the patron of the number of days upon which the loan is considered lost. A single overdue or lost item notification per notification type may be sent to the patron listing all of the patron’s overdue or lost loans.

You can configure 5 types of notifications and their corresponding letters. After configuring the notification types, you then configure the profiles that will trigger these notification types.

To configure the fines for overdue and lost loan notification types:

1. On the Terms of Use Management page (Configuration Menu > Fulfillment > Physical Fulfillment > Terms of Use and Policies), filter by Terms of Use Type = Loan.
2. Select Edit from the row actions list for the relevant Terms of Use. The Terms of Use Details page appears.
3. Locate the relevant Overdue Notification Fine Type entry on the bottom of the page, and select Add Policy from the row actions list. The Policy Details page appears.
4. Enter a Name and Value in the relevant fields, and ensure that Value Type = Other.
5. Select Save. The policy is added to the notification fine type on the Terms of Use Details page.

Additionally, the configured Terms of Use appears on the Fulfillment Configuration Utility page (Fulfillment > Advanced Tools > Fulfillment Configuration Utility) when you enter a Patron Identifier and Item Barcode. The amount configured for Overdue Notification Fine Type 1 is charged if a profile configured with Overdue Notification Fine Type 1 is triggered. The same applies for the other fine types.

For details on configuring the Overdue and Lost Loan Notification letter (letter code: FulOverdueAndLostLoanNotificationLetter) that is sent to patrons, see Configuring Letter Labels. Modify the fields additional_info_*_type1, inform_you_item_below_type1, and charged_with_fines_fees_type1 to change overdue notification type 1, and so forth.
Adding an Overdue and Lost Loan Profile

You can add an overdue and lost loan profile to an institution. This profile determines the criteria by which loans are considered lost. For these loans, Alma changes the status to **Lost**, creates the relevant fines and fees, and sends an invoice (for the replacement fee) to the borrowing patron.

To add an overdue and lost loan profile:

1. On the Overdue and Lost Loan Profile List page (Configuration Menu > Fulfillment > Physical Fulfillment > Overdue and Lost Loan Profile), select **Add Overdue and Lost Loan Profile**. The Overdue and Lost Loan Profile Record page appears.

   ![Image of the Overdue and Lost Loan Profile Record Page]

   **Overdue and Lost Loan Profile Record Page**

2. Enter the profile name and a description of the profile (if desired), and specify the criteria by which an overdue loan is considered a lost loan. Note that if you do not select specific statuses, user groups, libraries, locations, item policies, and/or material types, the profile will apply to all of the above.

---

**Note**

In order for the additional elements, for instance `additional_info_1_type1` through `additional_info_1_type5`, to appear on the Ful Overdue and Lost Loan Notification letter, you also need to customize the letter XSL. For detailed information specific to this letter, see [Overdue and Lost Loan Notification Letter XSL Considerations](#), below. For information on the use of XSL in customizing letters in general, see [Customizing Letter XSL Style Sheets](#).

---

**Overdue and Lost Loan Profile**

You can add an overdue and lost loan profile to an institution. This profile determines the criteria by which loans are considered lost. For these loans, Alma changes the status to **Lost**, creates the relevant fines and fees, and sends an invoice (for the replacement fee) to the borrowing patron.

To add an overdue and lost loan profile:

1. On the Overdue and Lost Loan Profile List page (Configuration Menu > Fulfillment > Physical Fulfillment > Overdue and Lost Loan Profile), select **Add Overdue and Lost Loan Profile**. The Overdue and Lost Loan Profile Record page appears.

   ![Image of the Overdue and Lost Loan Profile Record Page]

   **Overdue and Lost Loan Profile Record Page**

2. Enter the profile name and a description of the profile (if desired), and specify the criteria by which an overdue loan is considered a lost loan. Note that if you do not select specific statuses, user groups, libraries, locations, item policies, and/or material types, the profile will apply to all of the above.

---

**Note**

If you want to create a copy of an existing overdue and lost loan profile, select **Duplicate** from the row actions list. Once you have copied the profile, you can modify it as needed.
3. To enable the profile, select the **Active** check box. The lost loan job processes only active profiles. You can disable/enable the profile at any time on the Overdue and Lost Loan Profile List page.

### Note

- When viewing a loan in Loan History, a loan's initial **Loan Status** is **Loan**. As seen in Loan History, a **Loan Status of Normal** indicates a return to normal status after being in some other status. For example, to indicate five days after the loan was created, select a **Loan Status** of **Loan** and enter a **Days After Status Date** of 5. For more information on loan statuses, see Viewing Loan History.
- You can select multiple, predefined options for **Loan Status**, **User Group**, **Item Policy**, and **Material Type** while holding the CTRL key. These options are governed by a Boolean OR operator.
- The profile will be activated for loans that meet all the conditions specified in the profile. If the profile is set to mark the loan as lost, the loan is considered a lost loan (that is, a Boolean AND operator operates between fields). If the profile is set to mark the loan as overdue, then a notice will be sent and blocks/fines will be created, as per the profile configuration.
- The **Library** field refers to the item's current location. If the item is in a temporary location, this is the temporary location. If the item is not in a temporary location, this is the permanent location.
- If a due date is changed on an already overdue loan, an overdue fine is created before the due date is updated (similar to the the renew process) to make sure that a potential overdue fine is not automatically dropped. This behavior is determined by the `overdue_at_change_due_date` parameter. See Configuring Other Settings.

4. For setting the criteria for a Lost profile, in the **Profile Type** field, select **Change to Lost**. The **Send Notification**, **Create Fine** and **Create Block** fields disappear (they are not relevant for this selection). For setting the criteria for notification profiles, in the **Profile Type** field, select an **Overdue Notification type** (1 through 5).

5. For an overdue notification, select **Send Notification** to send the patron a notification letter matching the selected Profile type.

6. For an overdue notification on an item that is overdue and not returned, select **Create Overdue Loan Fine** to apply an overdue fine for the item when the job runs.

7. For both overdue and lost notifications, select **Create Overdue Notification Fee** to enable a notification fee. This field is only visible and applicable when using the aggregated notification method (i.e. the `switch_to_overdue_and_lost_loan_new_job` parameter in the customer parameters mapping table is set to true). Selecting the check box allows your institution to charge a fee per warning letter, rather than per loan.

8. For both overdue and lost notifications, enter **Overdue Notification Fee Amount** to set the notification fee. This field appears only when the **Create Overdue Notification Fee** check box is selected. When it appears, it is a mandatory field.

9. For an overdue notification, select **Create Block** to impose a user block while the loan is overdue. When **Create Block** is selected, a **Block Type** appears. The values in this drop down are defined in the **User Block Description** page (see Configuring User Blocks Due to Overdue Loans). The block is removed when the item is returned or lost, or the loan is deleted.

10. In the **Days After Due Date** field, enter the number of days after the due date upon which the warning notification
message is to be sent. Select either Days or Open Days to determine if the number of days is calculated by calendar days or by the days that the library is open.

For example, if an item’s due date is March 1, Days After Due Date = 14, and Days is selected, the item is considered lost on March 15.

---

**Note**

This calculation does not ignore days on which the library is closed. For example, if the Days after due date=14, the system’s calculation is based on 14 calendar days.

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11. In the Days After Status Date field, indicate the number of days after an update to the value of the Loan Status field that the item is considered lost. The number of days is calculated by calendar days.

For example, if an item’s loan status is updated on April 1 and Days After Status Date = 10, the item is considered lost on April 11. (Note that a value of 0 is the same as leaving the field empty.)

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**Note**

The value of this field also applies to migrated loans, according to the loan’s creation date.

---

12. When you are done, select Save. The profile appears on the Overdue and Lost Loan Profile page.

All active Overdue and Lost Loan profiles are processed by the Overdue and Lost Item job. See Viewing All Scheduled Jobs. If the overdue profile contains an Overdue Notification Fee, the fee will be recorded for each user with the profile type and names of all profiles that were aggregated. If profiles of the same overdue profile type have different Notification Fee Amounts, they will not be aggregated. They will be separated into two letters. Each one of those letters will create an Overdue Notification Fine.

When adding a new profile or modifying a profile name, a message is displayed to prompt the user to run the Status Update, It is recommended to run Status Update for the for updated profile.

---

**Loans Overdue Notification Status Update**

The Loans Overdue Notification Status Update page (Fulfillment > Advanced Tools > Loans Overdue Notification Status Update) allows the user to run the Overdue and Lost Loan job without creating blocks or fines and fees, without changing the loan to lost, and without generating notifications. It is visible on the Fulfillment Advanced Tools for users with the Fulfillment Administrator role when the switch_to_overdue_and_lost_loan_new_job parameter is set to true. The affected loans will be marked to prevent them from getting the same notifications a second time when the job runs again. Running this job will irreversibly mark the loan records so they will not be handled by the matching profiles again.

Running the job displays a warning that the loan records will be modified.
Overdue and Lost Loan Notification Letter XSL Considerations

There are up to five notification types that may be used within the Ful Overdue and Lost Loan Notification Letter (letter code: FulOverdueAndLostLoanNotificationLetter). Because the single letter format contains all five scenarios you may need to customize your letter with XSL if clauses. For example,

- inform_you_item_below_type1 belongs to Overdue notification type 1
- inform_you_item_below_type2 belongs to Overdue notification type 2
- inform_you_item_below_type3 belongs to Overdue notification type 3
- inform_you_item_below_type4 belongs to Overdue notification type 4
- inform_you_item_below_type5 belongs to Overdue notification type 5

To implement these types correctly in the letter, replace the following section in the letter:

```xml
<table cellspacing="0" cellpadding="5" border="0">
    <tr>
        <td>
            <h>@@inform_you_item_below@@</h>
            <h>@@borrowed_by_you@@ @@declared_as_lost@@</h>
        </td>
    </tr>
</table>
```

With:

```xml
<xsl:for-each select="notification_data">
    <xsl:if test="/notification_data/notification_type='OverdueNotificationType1'">
        <table cellspacing="0" cellpadding="5" border="0">
            <tr>
                <td>
                    <h>@@inform_you_item_below_type1@@</h>
                    <h>@@borrowed_by_you@@ @@declared_as_lost_type1@@</h>
                </td>
            </tr>
        </table>
    </xsl:if>
    <xsl:if test="/notification_data/notification_type='OverdueNotificationType2'">
        <table cellspacing="0" cellpadding="5" border="0">
            <tr>
                <td>
                    <h>@@inform_you_item_below_type2@@</h>
                    <h>@@borrowed_by_you@@ @@declared_as_lost_type2@@</h>
                </td>
            </tr>
        </table>
    </xsl:if>
</xsl:for-each>
```

Similar for the additional_info_<1-5>, replace:
with:

<table>
  <xsl:choose>
    <xsl:when test="notification_data/notification_type = 'OverdueNotificationType1' ">
      <tr>
        <td>
          <font size="5">@@additional_info_1_type1@@</font><p><font size="2">@@additional_info_2_type1@@</font></p>
        </td>
      </tr>
    </xsl:when>
    <xsl:when test="notification_data/notification_type = 'OverdueNotificationType2' ">
      <tr>
        <td>
          <font size="5">@@additional_info_1_type2@@</font><p><font size="2">@@additional_info_2_type2@@</font></p>
        </td>
      </tr>
    </xsl:when>
    <xsl:when test="notification_data/notification_type = 'OverdueNotificationType3' ">
      <tr>
        <td>
          <font size="5">@@additional_info_1_type3@@</font><p><font size="2">@@additional_info_2_type3@@</font></p>
        </td>
      </tr>
    </xsl:when>
    <xsl:when test="notification_data/notification_type = 'OverdueNotificationType4' ">
      <tr>
        <td>
          <font size="5">@@additional_info_1_type4@@</font><p><font size="2">@@additional_info_2_type4@@</font></p>
        </td>
      </tr>
    </xsl:when>
    <xsl:when test="notification_data/notification_type = 'OverdueNotificationType5' ">
      <tr>
        <td>
          <font size="5">@@additional_info_1_type5@@</font><p><font size="2">@@additional_info_2_type5@@</font></p>
        </td>
      </tr>
    </xsl:when>
  </xsl:choose>
</table>
Configuring Loan Recall Requests

To configure loan recall requests, you must have one of the following roles:

- General System Administrator
- Fulfillment Administrator

You can configure Alma to send or not send a loan recall request during system actions. By default, recall requests are enabled for all actions.

You configure loan recall requests on the Request Configuration mapping table for loan recalls (Configuration Menu > Fulfillment > Physical Fulfillment > Loan Recalls Configuration). For more information about mapping tables, see Mapping Tables.

**Request Configuration Mapping Table Page**

**Note**

- If the **Recalls Loans** value is set as **No** in this table for the **PATRON_PHYSICAL** type of request and the applicable loan Terms of Use has **Is Recallable** defined as **Yes**, the loan will not be recalled. Only if **Recalls Loans = Yes** is the Terms of Use policy applied.
To configure loan recall requests:

1. On the Request Configuration Mapping Table page for loan recalls (Configuration Menu > Fulfillment > Physical Fulfillment > Loan Recalls Configuration), select Customize from the row actions list for the relevant action. Customize is changed to Restore, and theRecalls Loans column is enabled for editing.

2. Select No in theRecalls Loans column to disable loan recall requests for the specified action.

3. Select Save. Loan recall requests are not sent during the specified action.

To re-enable loan recall requests for an action, select Restore.

After configuring a loan recall request for a specified action, ensure that the institution/library's Terms of Use has set the loan policy Is Recallable = True for requested items to be recalled (see Adding Fulfillment Policies).

Configuring Loan Status Names

To configure loan status names, you must have one of the following roles:

- General System Administrator
- Fulfillment Administrator

You can configure the loan statuses that are displayed in Alma. To do this, open the Loan Status Name mapping table (Configuration Menu > Fulfillment > Physical Fulfillment > Loan Status Name). For more information about mapping tables, see Mapping Tables. You can edit the description. This is the description that displays throughout Alma on various loan displays.
Configuring Request Task Names

To configure request task names, you must have one of the following roles:

- General System Administrator
- Fulfillment Administrator

You can customize the names of request statuses in your Primo My Account using the Request Task Name Patron Display Code Table page (Configuration Menu > Fulfillment > Physical Fulfillment > Request Task Name).

To customize request task names:

1. On the Request Task Name Patron Display Code Table page (Configuration Menu > Fulfillment > Physical Fulfillment > Request Task Name), modify the values in the Code and Description fields for the relevant status in the Request Step Statuses table.
2. Select Customize.

Configuring Request Pickup Rules

To configure request pickup rules, you must have one of the following roles:

- General System Administrator
- Fulfillment Administrator

Note

Request statuses can be configured at the institution level only. Select the required institution from the Configuring filter on the Fulfillment Configuration page.
A library can configure rules that determine how different aspects of request workflows are managed. Using these rules, libraries can better control how and when requests expire, how they appear on the pickup shelf, and whether the item is to be considered missing if it was not fulfilled within a specified number of days.

Learn about configuring support for pickup requests in the [Enhanced Request Configuration Options and Support for Self-Pickup Request](#) video (3:50 mins).

To configure request pickup configuration:


2. In the Name field, enter a name for the request pickup configuration rule.

3. In the Input Parameters section, specify the components of the input parameters (Name, Operator, and Value). A set of input parameters may look like this: User Group = Graduate student.

   The available Name input parameters are:
   - Location
   - Request Type
   - User Group

4. In the Output Parameters section, specify the following parameters that are to apply to the indicated Location, Request Type, or User Group:
   - **Consider as missing when expired** - Whether the requested item is considered missing if it is not fulfilled within a specified number of days.
   - **Show in 'Pick From Shelf' list** - Whether the requested item appears on the Pick From Shelf list.
   - **Expiry time for 'Pick From Shelf' (in days)** - The number of days after which the request is considered expired. For example, if you specify 5 in this field, once a requested item is not picked up within 5 days, the request is considered expired. If you do not specify the expiry time, the default is 7 days.
   - **Calculate expiry time in open days** - allows the number of days before a request is expired to be calculated for open days only. For instance, if the rule is 7 days but that calculated date is a closed day and the check box is
selected, the Pick From Shelf task will expire on the next open day. If the check box is deselected (which is the default), the Pick From Shelf task will expire on the closed day.

When the item’s expiration time arrives, the Requests – Handle Expiration Step job cancels the requests (see Viewing All Scheduled Jobs).

5. Select Save. The rule appears on the Request Pickup Configuration page.

6. If you defined more than one rule, use the Move Up and Move Down arrows to set the order of the rules. The order of the rules is important, since Alma applies the first (and only the first) appropriate, enabled rule.

7. Rules may be enabled or disabled in the Enabled column.

8. Select Calculate Existing Requests Retroactively. Alma retroactively applies the rules to existing requests. Otherwise, rules are applied only to requests created after the rule was enabled.

If no rule is configured, the item is always considered as missing when expired.

Configuring Self-Check Machine Messages

To configure self-check messages, you must have one of the following roles:

- General System Administrator
- Fulfillment Administrator

Messages for check-in, check-out, and renewal on self-check machines may be modified on the Self Check Messages page. It is accessed at (Configuration Menu > Fulfillment > Physical Fulfillment > Self Check Machines).

To configure self-check machine messages:

1. On the Self-Check Messages page, select Customize from the row actions list of the message that you want to configure.

2. Enter the new message in the Description field. Repeat these two steps for all messages that you want to configure.
3. When you are done, select **Customize** to save your changes.

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**Configuring Request Type Priorities**

To configure request priorities, you must have one of the following roles:

- General System Administrator
- Fulfillment Administrator

The Request Priorities mapping table allows you to configure the priorities for each of the different library request types. It is accessed at Configuration Menu > Fulfillment > Physical Fulfillment > Request Priorities.

To configure request priorities:

1. On the Request Priorities page, select **Customize** from the row actions list of the message that you want to configure.
2. Select the new priority in the **Priority** field. Repeat these two steps for all messages that you want to configure.
3. When you are done, select **Save** to save your changes.