

Library Users

Patron Accounts

To place requests, patrons must be assigned a patron role and have an assigned Resource sharing library or a default patron resource sharing library. If this is not defined in the patron's user information, Alma uses the **ill_item_creation_lib_code** (**Configuration > Fulfillment > General > Other Settings**) customer parameter to choose the Resource sharing library.

Patron settings

Setting Librarian-Assigned Blocks

From the user's Blocks section, you can define if a user is blocked from making loan requests, renewals, resource sharing requests, or hold requests. Each block may contain one or a combination of these blocks, together with a specific reason for the block, as configured by an administrator.

To configure blocks:

1. From the **User Block Descriptions** table (**Configuration > Fulfillment > Patron Configurations > User Block Description**), define the reasons for blocking a user, for example, **Disruptive behavior in the library**. After enabling the relevant reasons, **Save**.

Enabled	Code	Description	Translation	Default Value	Updated By	Last Updated
<input checked="" type="checkbox"/>	01-GLOBAL	Patron consistently returns books late	Patron consistently returns books late (GLOBAL)	<input type="radio"/>	Ex Libris	11/05/2011
<input checked="" type="checkbox"/>	02-GLOBAL	Disruptive behaviour in library	Disruptive behaviour in library(GLOBAL)	<input type="radio"/>	Ex Libris	11/05/2011
<input checked="" type="checkbox"/>	03-GLOBAL	Personal item left in library - contact	Personal item left in library - contact Ctr: desk(GLOBAL)	<input type="radio"/>	Ex Libris	11/05/2011
<input checked="" type="checkbox"/>	04-GLOBAL	Too many Claimed Returned Items	Too many Claimed Returned items(GLOBAL)	<input type="radio"/>	Ex Libris	11/05/2011
<input checked="" type="checkbox"/>	50-GLOBAL	New patron self registration - Web	New patron self registration - Web OPAC (GLOBAL)	<input type="radio"/>	Ex Libris	11/05/2011

2. From the **User Block Definitions** table (**Configuration Menu > Fulfillment > Patron Configurations > User Block Definitions**), assign a block to each reason you specified in the previous step.
 1. In the **Type** field, select the type of block: This is a descriptive field, except for Consortial blocks (that are used when copying a block to linked accounts in the network) and Demerits blocks (that are applied by accrued demerits on the user).
 2. In the **Blocked Action** field, select which actions to prevent:

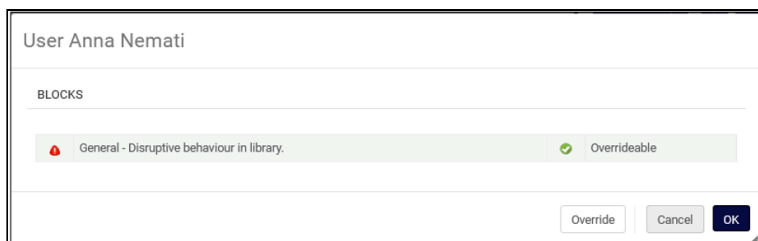
- 01 – loan
 - 02 – loan, renew
 - 03 – loan, renew, hold
 - **Note:** You can set up blocks for resource sharing and create other permutations of these block options (e.g., loan+hold). For these options, contact Ex Libris Support.
3. In the **Overridable** field, select which circulation roles are required to override the block:
 - ALL – Any circulation desk operator can override the block
 - NONE – Users cannot override the block
 - CIRCDESC – A circulation desk manager can override the block
 - OPERATOR – A circulation desk manager or a circulation desk operator can override the block (and not a user with circulation desk operator – limited permissions)
 4. In the **Network Block** field, select **False**, as currently we are setting up an institution-only block. If you are part of a network, select **True** - this copies the block to linked accounts created for your users.

ID	Type	Description	Overridable	Blocked/Action	Network Block	Updated By	Last Updated
01-GLOBAL	General	Patron consistent	ALL	01	False	Ex Libris	11/05/2011
02-GLOBAL	General	Disruptive behavior	ALL	01	False	Ex Libris	11/05/2011
03-GLOBAL	General	Personal item left	ALL	01	False	Ex Libris	11/05/2011
04-GLOBAL	General	Too many Claims	ALL	01	False	Ex Libris	11/05/2011
05-GLOBAL	General	New patron self r	ALL	01	False	Ex Libris	11/05/2011
03-GLOBAL	General	Patron to contact	ALL	01	False	Ex Libris	11/05/2011
01-LOCAL	General	Patron is blocked	ALL	03	False	Ex Libris	11/05/2011
02-LOCAL	General	Patron is not allow	ALL	03	False	Ex Libris	11/05/2011

3. Select **Save**. The block is set. For details, see [Configuring User Block Descriptions and Definitions](#).
4. To add the block to a specific user, find that user in the **Manage Users** screen (**Admin > User Management > Manage Users**). In the user's **User Details** screen, from the **Blocks** tab, add the **Disruptive behavior in the library** block to the user and select **Save**. For details, see [Blocking and Unblocking Users](#). You can also add an expiry date for the block to have it automatically lifted.

Active	Type	Description	Note	Owner	Created By	Creation Date	Expiry Date	Attached to loan
<input checked="" type="checkbox"/>	Gene...	Disruptive behaviour in library	-	Main Library	Alicia Chen	01/08/2021 13:59	-	

5. To test the block, try to loan the user an item. The following message appears:



As defined above, users with the Circulation Desk Manager or Circulation Desk Operator roles can override the block by selecting **Override** in the dialog box.

Non-Signed in Users

Use fulfillment terms of use to prevent user types from receiving Rapido offers. For example, create the below Terms of Use rule on the Fulfillment Unit of the Resource Sharing Library.

Configuring: Resource Sharing Library

Edit Fulfillment Unit

Fulfillment Unit Details | Fulfillment Unit Locations | **Fulfillment Unit Rules**

Rule Type: Loan

Institution Rules List

Filter: All

Enabled	Move Up	Move Down	Rule Name	Description	Output	Updated By	Update Date
<input checked="" type="checkbox"/>			End of Year SO Student Limited	Sets due date of items to 5/20/20	End of School Year SO Student	SQF8bGVk, SmlF2b24+	03/25/2020
<input checked="" type="checkbox"/>			End of Year CC Student Limited	Sets due date of items to 6/9/20	End of School Year CC Student	SQF8bGVk, SmlF2b24+	03/13/2020
<input checked="" type="checkbox"/>			2 Week Faculty/Staff Limited Loan		2 Week Faculty/Staff Limited Loan	1840927	04/05/2017
<input checked="" type="checkbox"/>			2 Week Student/Community Limited Loan		2 Week Student/Community Limited Loan	SQF8bGVk, SmlF2b24+	11/30/2018
<input checked="" type="checkbox"/>			7 Week Library Staff Limited Loan		49 Days Library Staff General	1840927	04/05/2017

Default Rule

Rule Name	Description	Output	Updated By	Update Date
1 Default loan rule	Default loan rule	Default terms of use	Staff, Ex Libris	02/02/2016

Fulfillment Unit Rules

Fulfillment Unit Rules Editor

Name: Resource Sharing Allowed

Description: Resource Sharing Allowed

Created by: Staff, Ex Libris | Created On: 02/22/2021

Updated by: Staff, Ex Libris | Updated On: 02/22/2021

Input Parameters

Name	Operator	Value
1 User Group	In List	Alumni, Employee, Faculty, Graduate Student, Staff, Undergraduate Student, Visitor

Output Parameters

Terms of Use: Allow Limitless Resource Sharing | Add Terms of Use

Fulfillment Unit Rules Editor

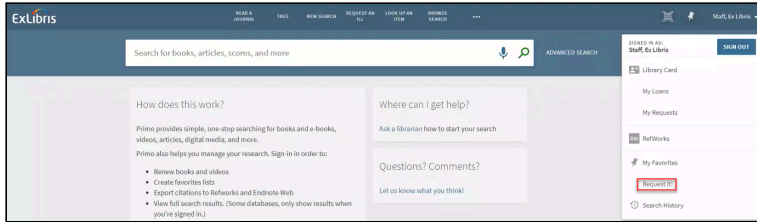
This rule enables every user to receive an offer when not logged in. When clicking the offer, the login screen appears. The login action reloads the full view page with the Rapido offer. If the rule prevents the user from receiving this request, no offer is presented.

Request It! Bookmark

When the parameter **request_it_enabled** (**Configuration > Resource Sharing > General > Other Settings**) is set to `true` (default `false`), the **Request It!** menu option is available for logged in users who have permission to use the blank form. For more information, see [Harvesting External Resources for Resource Sharing](#).

Note

Turning off the parameter does not prevent the form from further use. However, if the blank form is disabled, this form is also disabled. Libraries can share the link for users to save as a bookmark. Additionally, the request is considered **Request Created from Blank Form** by the mediation rules.



Request It!

The `requestIt` title, `requestIt.userBlocked`, `requestIt.notLoggedIn` error messages can be configured from [Discovery > Display Configuration > Labels](#). See [Rapido Labels](#).

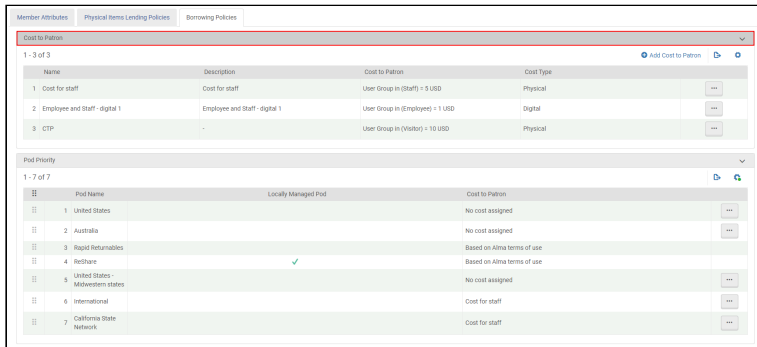
Cost to Patron

Configure the **Cost to Patron** ([Configuration > Resource Sharing > Members](#)) to charge a patron based on their user group and the material type requested (Physical/Digital). The cost associated with digital requests is only for requests that are handled by the Rapid network.

Note

The cost is only effective once the borrowing library receives the item.

Expand the **Cost to Patron** section and select **Add Cost to Patron**.



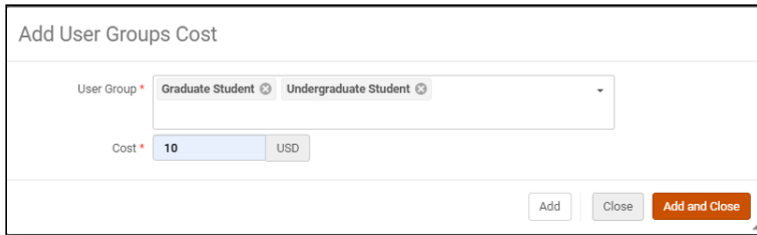
Cost to Patron configuration

Add a **Cost Type**.



Cost to Patron

Add the groups and their cost.



Add User Groups Cost

Assign the cost to a POD for a selected member.

Messaging

Article Delivery Message

Document Delivery requires configuration for integration with RapidILL. See [RapidILL Based Resource Sharing Workflow](#).

The document download page is displayed when a patron selects an email link using your institution's CNAME (e.g., [institutionA.alma.exlibrisgroup.com](#)) and not the classic link (e.g., [https://ap01-.alma.exlibrisgroup.com...TITUTIONA_INST](#)) link. This requires intervention from your IT department if you have not authorized the CNAME URL before.

The document download page uses the logo that is defined in your **Configuration > General > User Interface Settings > Alma Logo and Color Scheme** menu as the login page logo.



Document Delivery status