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## How to add a Fixed Due Date in Alma

- **Product:** Alma
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### Question

How to add or edit a fixed Due Date policy (e.g. End of Term, Semester, other Event)?

This question typically is raised upon new semester, and is triggered by a loan giving unexpected due date. Or, when testing loan due date with the: **Fulfillment Configuration Utility**.

### Answer

Under the **Fulfillment Configuration Menu**:

1. ADD AN EVENT IN: OPENING HOURS
  1. Go to: **Configuration** > Fulfillment > **Opening Hours** > Add Record > Record Type: **Event**.
    - **Recurrence:** No recurrence
    - **Fixed date description:** give indication, e.g. "End of Term Spring 2020".
    - **Date:** Due date for this type of loan. *"To Date" should extend to, or beyond the "End of Term" due date.*
  2. Save.
  3. Remember to click "**Apply Changes**".
2. LINK THIS EVENT TO THE DUE DATE POLICY IN: ADVANCED POLICY CONFIGURATION
  1. Go to: Configuration > Fulfillment > stay at the **Institution** level.
  2. Select: **Advanced Policy Configuration**.
  3. Filter "**Policy Type**" to: "**Due Date**".
  4. Find the existing Policy, or add a new one.
    - Actions > Edit > Make sure the "**Value**" uses the Event defined above.
3. ENSURE THE LOAN TOU USES THE CORRECT DUE DATE POLICY
  1. Go to: Configuration > Fulfillment > Stay at the **Institution** level.
  2. Select: **Terms of Use and Policies**.
  3. Filter "**Terms of Use**" having type "**Loan**".
  4. View, or Edit, or Add a TOU (loan terms of use) which will enable loan until end of term / semester.
  5. The "Due Date" drop-down menu will use the policy defined above.
  6. Save if needed.

At any point, test due date calculation with: **Fulfillment Configuration Utility**.

As needed, verify more configuration as detailed below.

1. ENSURE THAT THE "FULFILLMENT UNIT" INCLUDES THIS ITEM LOCATION AND HAS CORRECT LOAN RULES

1. Go to: Configuration > Fulfillment > stay at **Institution** level.
2. Click: **Fulfillment Units**.
3. Click the Code for the correct Fulfillment Unit.
  - *If in doubt, at any point, check combination of user and item barcode with the : **Fulfillment Configuration Utility***
4. The tab "**Fulfillment Unit Locations**" tab should include the item location.
5. Next, check the "**Fulfillment Unit Rules**" tab.
6. Keep the filter of "**Rule Type**" to stay with: "**Loan**".
7. View, Edit or Add a rule that will ensure the preferred due date TOU is in effect (rules are read from top to bottom, looking for match based on User Group, Item Policy, etc.).
8. Save if needed.

## Additional Information

For visual and detailed steps, refer to "[How to make the due date be a fixed date](#)", and more "[Presentations and Documents](#)".

The Event must be on an **Open Day**, so make sure that the Library **Opening Hours** configuration has open hours for that date.

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