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## Patron Account Configurations

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### Note

This page describes how to configure patron accounts including user groups, patron limits, user authentication and loan limits.

For information on configuring demerits see [Configuring User Blocks](#).

For links to all the main fulfillment documentation pages see [Fulfillment](#).

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## Configuring Patron (User) Groups

To configure patron (user) groups, you must have one of the following roles:

- General System Administrator
- Fulfillment Administrator

This page explains how to configure patron limits and authentication requirements for patron user-groups.

- Watch the [Configure User Blocks](#) video.
- Watch the [Configure Patron and Loan Limits](#) video.

The patron user-groups themselves are created and configured on the User Groups Code Table page (**Configuration Menu > Fulfillment > Patron Configurations > Patron Groups**). For details, see [Configuring User Groups](#).

Blocks on individual patrons, based on accumulated demerit points or overdue loans, can also be created. For details, see [Configuring User Blocks](#).

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### Note

If your institution is using user groups as fulfillment parameters (e.g., in [Fulfillment Unit Rules](#), [Display Logic Rules](#), etc.), you will need to update the rules with the new user group in order for them to take effect for users in the group.

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## Configuring Patron Limits

To configure patron limits, you must have one of the following roles:

- General System Administrator
- Fulfillment Administrator

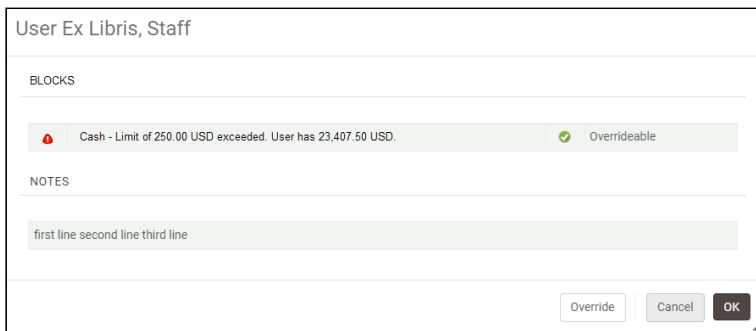
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## Note

For the how-to that guides you through the process of setting up librarian- and system-assigned blocks to patrons, see [How To Set Up Blocks to Prevent Loaning, Renewing and Hold Requests for Patrons](#).

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Alma enables you to define various limits that apply to the patrons who use the services of the institution and libraries within the institution. Patron limits are checked and applied when a patron attempts to borrow or renew a resource from the library. When a patron reaches one of the defined limits, the patron's account is blocked. The patron limits are calculated in real-time during fulfillment activities (similar to loan limits) and do not appear in the user's "Blocks" tab. For example, you can specify that the patron's account is blocked when the patron reaches 10 overdue items. The patron will not be able to borrow additional resources from the library until the number of overdue loans on their account is below the configured limit.



## Block Pop-up Message

Selecting **OK** continues the flow and the user will be prompted with the block message where relevant when loaning or renewing an item. Selecting **Override** causes the blocks to be overridden i.e., the user will not be prompted with this message for loans.

Patron limits are defined for groups of patrons, based on the user groups to which the patrons are assigned. For example, you could define a set of limits for all patrons that are part of the **Graduate Student** user group. For each user group, you can define limits that may block a patron's account, such as:

Maximum number of overdue items

- Maximum amount of cash that can be owed by the patron
- Maximum number of bookings (not including resource sharing requests)
- Maximum number of overdue recalled items

These limits are configured at the institution level using the Patron Limits Definitions mapping table. Each set of limits can be either enabled or disabled. By default, each new set of patron limits is enabled. The limits that you define apply to all libraries within the institution.

Patron limits are configured on the Patron Limits Mapping Table page ([Configuration Menu > Fulfillment > Patron Configurations > Patron Limits](#)).

Mapping Table Cancel Save

Patron Limits Definitions ?

Table Description: Patron Limits Definitions  
Customization mode: Entire table needs to be customized

+ Add Row +

	User group	Max. cash	Max. overdues	Max. bookings	Max. overdue recalls	Max. digitization requests	Max. physical item requests	Updated By	Last Updated	
1	Undergrad	100.00	10	2	1	5	10	ext_impl	2015/09/10	...
2	Graduate s	100.00	15	3	2	5	15	ext_impl	2016/02/08	...
3	Consortium	100.00	10	2	1	5	10	ext_impl	2015/09/10	...
4	Part-time	100.00	10	2	1	5	10	ext_impl	2015/09/10	...
5	Faculty	250.00	25	5	3	10	25	ext_impl	2015/09/10	...
6	Academic	250.00	25	3	2	10	25	ext_impl	2015/09/10	...
7	Alumni	25.00	3	1	0	3	5	ext_impl	2015/09/10	...
8	Guest	25.00	3	1	0	3	5	ext_impl	2015/09/10	...
9	Staff	250.00	25	3	2	10	25	ext_impl	2015/09/10	...

## Patron Limits Mapping Table Page

### Note

Patron limits can be configured at the institution level only. Select the required institution from the **Configuring** filter on the Fulfillment Configuration page.

The following actions can be performed on this page:

- Add a set of patron limits (see [Adding a Set of Patron Limits](#))
- Edit a set of patron limits (select **Edit**)
- Delete a set of patron limits (select **Delete**)

## Adding a Set of Patron Limits

You can add a new set of patron limits to the institution. When you add a set of patron limits for a specific user group (for example, **Alumni**), ensure that there is only one enabled set of limits for this user group.

You define patron limits at the institution level. The limits that you define apply to all libraries within the institution.

### To add a new set of patron limits:

1. On the Patron Limits Mapping Table page (**Configuration Menu > Fulfillment > Patron Configurations > Patron Limits**), select **Add Row** and select the patron user group for which you want to create a new set of limits.

User group ✕

Academic Staff ▼

Max. cash

Max. overdues

Max. bookings

Max. overdue recalls

Max. digitization requests

Max. physical item requests

Add Row

### Create New Patron Limits

2. Enter the following information:

- **Max. cash** – Maximum amount of cash that can be owed by the patron before the patron’s account is blocked.

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**Note**

**Max. cash** is a required field.

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- **Max. overdues** – Maximum allowed overdue loans before the patron's account is blocked. If you define max. overdue = 1, the patron account is blocked only after there is more than one overdue loan. Setting max. overdue to 0 will block a patron with one overdue loan.
- **Max. bookings** – Maximum number of bookings allowed before the patron’s account is blocked. This value does not include resource sharing requests.
- **Max. overdue recalls** – Maximum number of overdue recalled items allowed before the patron’s account is blocked. Note that setting max. overdue recalls to 0 will block a patron with one overdue loan.
- **Max. digitization requests** – Maximum number of digital item hold requests allowed before the patron’s account is blocked
- **Max. physical item requests** – Maximum number of concurrent active physical item hold requests allowed before the patron’s account is blocked

If you leave one of the above boxes blank, no limit will be applied in this area.

3. Select **Add Row**. The new set of limits is displayed at the bottom of the list of defined patron limits.
4. Select **Save** to store the new set of patron limits.

## Configuring Patron User Authentication

### Note

For Primo VE environments, you will also need to configure user authentication for Primo VE sessions. For more information, see [Configuring User Authentication for Primo VE](#).

To configure patron user authentication, you must have one of the following roles:

- General System Administrator
- Fulfillment Administrator

You can configure the login options that appear in the Alma digital viewers from the User Authentication page (**Configuration > Fulfillment > Patron Configurations**).

The screenshot shows the 'Patron User Authentication' configuration page. It has two tabs: 'Profiles' and 'Login labels'. The 'Profiles' tab is active, showing a table of 'Authentications Profiles' with columns for Active, Code, Display Name, and Integration type. Below it is a 'Login Page Help Links' section with a table of links with columns for Active, Code, Label, and URL. At the bottom are 'Authentication Settings' with checkboxes for 'Single Sign Out Upon Timeout' and 'Enable Silent Login'.

Active	Code	Display Name	Integration type
<input checked="" type="checkbox"/>	Alma	Alma	ALMA
<input type="checkbox"/>	social	Social via Alma	SOCIAL_VIA_ALMA

Active	Code	Label	URL
<input checked="" type="checkbox"/>	login.link1	NOT_DEFINED	-
<input checked="" type="checkbox"/>	login.link2	NOT_DEFINED	-
<input checked="" type="checkbox"/>	login.link3	NOT_DEFINED	-
<input checked="" type="checkbox"/>	login.link4	NOT_DEFINED	-

Authentication Settings

Single Sign Out Upon Timeout  Enable Silent Login

### Patron User Authentication

To configure patron user authentication:

1. Open the User Authentication page (**Configuration > Fulfillment > Patron Configurations > Patron User Authentication**).
2. From the **Profiles** tab, in the **Authentication Profiles** section, activate the profiles that you want to appear in the Alma digital viewers.

### Note

The profiles that appear here are integration profiles configured with an integration type of SAML, LDAP, CAS, and Social/Email Login. For more information, see [Configuring Integration Profiles](#).

3. In the **Login Page Help Links** section, activate and edit the links that appear when the patron clicks the **Need help for this page** link (configurable) in the viewer login page.
4. To have the viewer sign out when Alma times out, select **Single Sign Out Upon Timeout**.

5. Select the **Login Labels** tab. The following appears:

### Login Labels

Edit the labels that appear in the viewer login page.

6. Click **Save**.

## Configuring Loan Limit Rules

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

- General System Administrator
- Fulfillment Administrator

To limit the number of items a patron can check out simultaneously, add a loan limit rule. The rule can be applied according to library, location, item policy, material type, and user group.

You configure loan limit rules from the Loan Limit Rule page ([Configuration Menu > Fulfillment > Patron Configurations > Loan Limits](#)).

Enabled	Move Up	Move Down	Rule Name	Description	Updated By	Update Date
<input checked="" type="checkbox"/>			Staff	-	Implementer, Ex Libris	2016/04/26
<input checked="" type="checkbox"/>	▲	▼	Undergraduate Student	-	-	-
<input checked="" type="checkbox"/>	▲	▼	Community Borrower	-	Implementer, Ex Libris	2012/11/16
<input checked="" type="checkbox"/>	▲	▼	Inter-Library Loan	-	-	-
<input checked="" type="checkbox"/>	▲	▼	Graduate Student	-	-	-
<input checked="" type="checkbox"/>	▲	▼	Faculty	-	Implementer, Ex Libris	2015/02/03
<input checked="" type="checkbox"/>	▲	▼	Main Location Limit	Main Location Limit	Support, Ex Libris	2013/06/04
<input checked="" type="checkbox"/>	▲	▼	Students	-	Implementer, Ex Libris	2015/02/03
<input checked="" type="checkbox"/>	▲	▼	Visitors	-	Implementer, Ex Libris	2015/02/03
<input checked="" type="checkbox"/>	▲	▼	Undergraduate and Laptop/Laptop Charger	-	Implementer, Ex Libris	2016/02/08

### Loan Limit Rules Page

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## Note

Loan limit rules can be configured at the institution level only. Select the required institution from the **Configuring** filter on the Fulfillment Configuration page.

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The following actions can be performed on this page:

- Add Loan Limit Rules (see [Adding Loan Limit Rules](#)).
- Edit Loan Limit Rules (select **Edit** from the row actions list).
- Duplicate Loan Limit Rules (select **Duplicate** from the row actions list and modify the relevant fields).
- Delete Loan Limit Rules (select **Delete** from the row actions list).

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## Adding Loan Limit Rules

You can add a loan limit rule. The rules that you define apply to all the libraries within the institution.

### To add a loan limit rule:

1. On the Loan Limit Rules page (**Configuration Menu > Fulfillment > Patron Configurations > Loan Limits**), select **Add Rule**. The Loan Limit page opens.

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## Note

If you want to create a copy of an existing loan limit rule, select **Duplicate** from the row actions. Once you have copied the loan limit rule, you can modify it as needed.

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The screenshot shows a web interface for configuring a loan limit rule. At the top, there's a header with a back arrow, the title "Loan Limit", and "Cancel" and "Save" buttons. Below this is a form with three main sections, each with a dropdown arrow on the right:

- Input Parameters:** Contains a "Name" field with a red asterisk, a "Description" field, and two rows of metadata: "Created By: Ex Libris" and "Created On: 2017/08/07", followed by "Updated By: Ex Libris" and "Updated On: 2017/08/07".
- Input Parameters (second instance):** Contains an "Add Parameter" button with a plus icon and a dropdown arrow. Below it, a message says "No records were found." with a list icon.
- Output Parameters:** Contains a "Loan limit" field with a red asterisk.

### Loan Limit Page

2. Under **Input Parameters**, enter a name and description of the loan limit rule.
3. Under **Input Parameters**, specify the components of the input parameter (**Name**, **Operator**, and **Value**). A set of input parameters may look like this: *Library=ArtLibrary*.
4. Select **Add Parameter**. The set of input parameters is added to the list of parameters for the loan limits rule.
5. Repeat the previous two steps to add all of the required parameters for the rule.

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**Note**

At least one input parameter must be fulfilled for the rule to be applied.

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6. Under **Output Parameters**, enter a loan limit – the maximum number of items that a patron can borrow according to the loan limit rule. If you enter 0 all loans are blocked.
  7. Select **Save** to store the new rule.
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**Note**

- The order of the rules is not important. All the rules that match the criteria are checked by the system. If a limit defined by any of the rules is exceeded, the new loan is not created.
  - For unlimited loans, do not create a loan limit rule that applies to the loan.
-