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## Circulation Policies, Configuration

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### General

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#### How does Alma support circulation functions on the institution and library level?

Alma's basic design is based on two organizational levels, the Institution and the Library:

1. **The Institution** is the basic level of data and workflow management in Alma; it also holds all of the institution, or local library, data. Some processes and configurations, however, may be managed at the Library level.
2. **The Library** is one or more physical locations that are normally housed in a single building or in several buildings that are in close proximity to one another. It has locations and circulation desks that are familiar to the library patrons.

Fulfillment relationships define the services that one library is able to perform for another library within the same institution. The service options are:

- **Deliver to** (available on the library level only) – The library being configured can deliver resource sharing items for patron pickup to the specified library.
- **Circulate for** (available on the library level only) – The library being configured can check in and check out items for the specified library.
- **Acquire for** (available on both the library and institution levels) – The library or institution being configured can acquire items for the specified library.
- **Supply from** (available on the resource sharing library level only) – The resource sharing library being configured supplies items for resource sharing that come from the specified library.

Selecting **All** for any of these service options indicates that the library/institution being configured can provide the service for all libraries or receive the service from all libraries in the institution. If **All** is selected for a service but an individual library has a different value, the library's selection will take precedence.

You configure fulfillment relationships on the Organizational Units Relationships Setup page. Each circulation desk is associated with a library and serves particular locations in that library.

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### Loan rules

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#### How are loan rules defined in Alma?

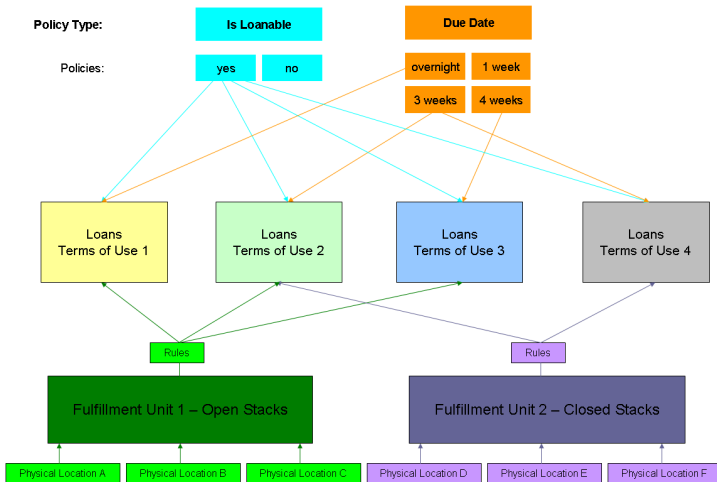
Alma allows the library to pre-define the policies by which items are made available to users using combinations of variables. These variables include loan period, quotas for different material types, fines, number of titles, sites, and borrower types.

Policies, Terms of Use (TOU), and Fulfillment Unit rules determine the terms by which services are provided by the library to the patron. For instance, based on these policies, a patron may be required to return a book three days after checking it out and, if returning it late, pay a late fine of \$10. The same item for a staff patron may be a two-week loan and no late fine.

A **Policy** is the basic building block of TOU. A policy sets specific conditions for a specific service. For example, 'Allowed Pickup Locations' = 'Anywhere', or 'Lost Item Fee' = 150. More than one policy may be configured for a given type of service. The policy which will be applied in a given situation depends upon the TOU which apply to that situation.

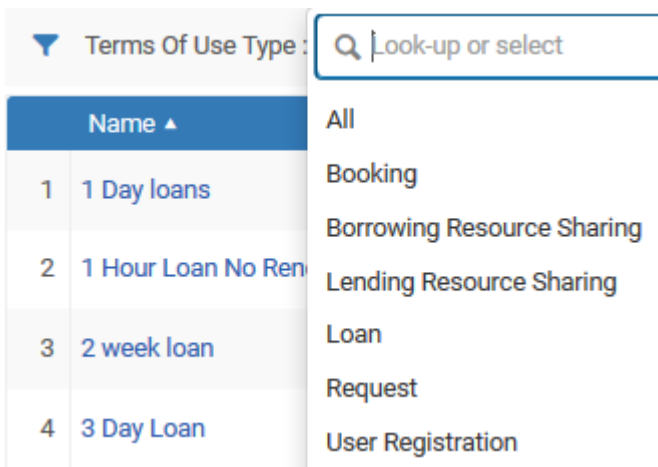
**Terms of Use** are an aggregation of policies relating to a particular service. For example, TOU for a loan aggregates policies such as Lost Item Fine, Maximum Renewal period, Overdue Fine, etc. More than one TOU may be configured for a given service. The TOU to be applied in a given situation depends upon the applicable Fulfillment Unit and the rules configured for that service within the fulfillment unit.

**Fulfillment Units:** A fulfillment unit includes one or more locations within a library that follow the same policies. Fulfillment units include rules which determine the “terms of use” for patrons of the libraries.



## How are policies (Terms of Use) defined in Alma?

Alma supports the concept of Terms of Use (TOU), which refers to an aggregation of policies relating to a specific fulfillment service type (e.g., loan, request, etc.), reusable for combinations of patrons and items.



Terms of use can be applied differently for different combinations of user groups, job categories, material types, process types and locations.

An example of a TOU record may be seen in the following screen capture:

Policy Type	Policy Name
1 Is Loanable	Loanable (Loanable)
2 Is Recallable	Recall Allowed (Recall is possible)
3 Due Date	4 Week Loan
4 Requested Item Due Date	Two weeks for a requested item (Two weeks for
5 Recall Period	Two weeks for a recalled item (Two weeks for :
6 Renew Fee	No Renewal Fee (Default No Renewal Fee)
7 Lost Item Fine	Lost Item Fine - 10 (Fining \$10 for losing an ite
8 Lost Item Replacement Fee	Lost Item Replacement Fee 50 (Fee for replacin
9 Lost Item Replacement Fee Refund Ratio	90 per cent of lost item cost is returned

Taken together, the policies define the ‘terms-of-use’ under which the specific fulfillment service will be provided (or not) to the patron by the institution or the library.

Alma’s Terms of Use (TOU) policy includes a parameter for defining the behavior of due dates related to library hours and closures. This rule will automatically be applied to all relevant loans and transactions. Options include automatically extending a due date to account for a closed period. In the case of an unplanned closure, the due dates will automatically be adjusted related to the unexpected closure.

16 Closed Library Due Date Management	<input type="text" value="Look-up or select"/> <ul style="list-style-type: none"> <li>Move Due Time to Next Open Time (When the Library will</li> <li>Move Due Time to Upcoming Closing Time (When the Libr</li> <li>Move to the end of the next open day (Move to the end of</li> <li>No Change To Due Date (Default value for ClosedHourMar</li> </ul>
17 Cancelled Recall Due Date	
18 Overdue Notification Fine Type 1	
19 Overdue Notification Fine Type 2	

## What are Fulfillment Units in Alma?

Fulfillment Units are groups of locations that share common circulation policies. Any number of such units may be defined:

Code	Name	Owner	Description
1 REGULAR	Regular Location Circulating Material	Institution	Sets the rules by which items in regular locations circulate
2 LIMITED	Limited Circulating Material	Institution	Sets the rules by which limited circulating items circulate
3 RESERVE	Reserve Location Circulating Material	Institution	Sets the rules by which items in reserve locations circulate
4 MEDIA	Media and Equipment Circulating Material	Institution	Set the rules by which media and related equipment circulate
5 ILL	ILL Management	Institution	-
6 OneDayOnly	One Day Only loans	Institution	One Day Only circulation due at end of day
7 REF	Reference Books	Institution	Reference books for use in the reading room
8 TEMP	Temporary Storage	Institution	Temporary Storage for items that cannot be requested or loaned

Fulfillment Unit parameters define requesting options, locations served by the Fulfillment Unit, and the rules that govern the unit.

**Regular Location Circulating Material**

**Code** REGULAR

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

**Name \*** Regular Location Circulating Material

**Description** Sets the rules by which items in regular locations circulate

**On Shelf Request Policy \***

- Request for pickup anywhere regardless of availability
- Request for pickup in different library only
- Request for pickup in different campus only
- No Requesting from available holding
- No Requesting

Fulfillment Unit rules determine the Terms of Use to apply when delivering a particular fulfillment service to the patron.

An example of a Fulfillment Rule for loans can be seen in the following screenshot. Input parameters define the User Group “Faculty” and Material Type “iPads”. The output parameter is the TOU by which this group can loan iPads.

**Fulfillment Unit Rules Editor**

**Name \*** iPads for Faculty

**Description** user group faculty and mat. type = iPad , loan for one week

**Created By** Chris Parson   **Created On** 01/07/2013

**Updated By** Joseph Smith   **Updated On** 12/02/2015

**Input Parameters**

Name	Operator	Value
1 User Group	=	Faculty
2 Material Type	=	iPad

**Output Parameters**

**Terms of Use \*** Standard One Week Loan   **TOU Details**   **Add Terms Of Use**

An example of a fulfillment rule for requests – the input parameter defines the location. The output parameter is the TOU by which items from this location can be requested.

**Fulfillment Unit Rules Editor**

**Name \*** Asian Collection - no requests

**Description** Main Library - Asian Collection not allowed requests

**Created By** Super User   **Created On** 09/02/2014

**Updated By** Joseph Smith   **Updated On** 03/29/2016

**Input Parameters**

Name	Operator	Value
1 Location	=	Main Library - Asian Collection

**Output Parameters**

**Terms of Use \*** No requests allowed   **TOU Details**   **Add Terms Of Use**

The TOU can be viewed from the Fulfillment Rule screen:

**Output Parameters**

**Terms of Use \*** Request Highest Priority   **TOU Details**

## Request Highest Priority

### Description

Request Highest Priority

	Policy Type	Policy Name	Policy Description
1	Is Requestable	Requestable	Requestable
2	Pickup Locations	Anywhere	Default value for Pickup - Anywhere
3	Hold Shelf Period	7 day Hold Shelf	Default value for HoldShelfPeriod
4	Is Digitizeable	Is Digitizable	Default value for digitizable
5	Is Requestable for Resource Sharing	Requestable For Resource Sharing	Item is requestable for Resource Sharing
6	Request Priority	Highest	Highest
7	On Shelf Request Policy	Allow requests for items available on the shelf	Allow requests for items available on the shelf
8	Personal delivery	Personal Delivery - None	Do not deliver items at all

## How can lending rules be reviewed?

Lending rules can be viewed, edited and managed by authorized staff through the Fulfillment Configuration Menu.

As lending rules are flexible and may differ based on user groups and other factors, Alma offers a **Fulfillment Configuration Utility** that allow a staff user to input a patron and item in order to see the rules that apply to the lending of that item, as well as the due date if loaned now. Optionally, staff can also enter a return date and time and calculate what the overdue fine would be.

The authorized staff user can link directly from this page to the configuration page of the Fulfillment Unit, the Fulfillment Unit Rule, or the Terms of Use and edit them if needed.

### < Fulfillment Configuration Utility

Patron Identifier \* Sara Carr - Undergraduate Stude

Item Barcode \* 220-10

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**Fulfillment Attributes**

Fulfillment Unit Name **Regular Location Circulating Material**

Fulfillment Unit Rule **One Week Loan**

Terms Of Use Name **Standard One Week Loan**

Due date if the item would be loaned now **21/06/2017 10:51**

Return date

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**Terms of Use Policies**

	Policy Type	Policy Name	Policy Description
1	Block When Overdue	No block when overdue	Do not create a block when overdue
2	Maximum Period For Overdue Block	No Maximum Block Period	No Maximum Block Period for Block When Overdue

The **Fulfillment Configuration Utility** has tabs for rules relating to Loans, Requests, Bookings and Overdue Lost Loan Profiles:

Fulfillment Configuration Utility Cancel

The Item is on loan for user: Batson, Billy. Due date: 11/01/2018 10:50:00 CDT.

Patron Identifier \* **Batson, Billy - Undergradu** Item Barcode \* **86208-Rain on the r** OK

Loan Request Booking Overdue and Lost Loan Profiles

Existing Loan Attributes

User Group **Undergraduate Student**  
 Item Location **Main Library (Stacks)**  
 Loan Status **Normal**  
 Material Type **Book**  
 Item Policy **1 hour loan**  
 Already Handled by Profiles -

Matching Profiles (By patron, item and loan status)

Name	Profile Type	Description	Days After Due Date
1 Students Notify 30 Days	Overdue notification type 1	-	30
2 Students Lost 45 Days in the Main Library	Change to lost	-	45

## How are overnight loans in Alma handled?

Defining settings for overnight loans can be achieved by setting the time at which the overnight loan comes into effect as the closing hour in the library's calendar. This has NO effect on the physical closing hour of the library. For example you can set the closing hour of the library to 6:00 p.m. whereas the library physically closes its doors at 10:00 p.m.:

**Add Record**

Record type \* **Standard opening hours**

Day of week \* **Thursday**

From hour (HH:mm) \* **09:00**

To hour (HH:mm) \* **18:00**

In addition, the loan policy for this type of loan should have the line 'Closed Library Due Date Management' set to the option 'Move Due Time to Next Open Time':

16 Closed Library Due Date Management Move Due Time to Next Open Time (When the L -

## Can a patron be blocked from reloaning an item that they have just returned?

You can configure a re-loan limit, preventing patrons from re-loaning items that they have just returned. A policy type, **Reloan Limit**, in the Loans Terms of Use table controls this:

Policy Type	Policy Name
16 Closed Library Due Date Management	No Change To Due Date (Default value for ClosedHourMana)
17 Cancelled Recall Due Date	Keep due date (No change to the due date)
18 Overdue Notification Fine Type 1	ABES fixed fine day 61 - 119: 10 Euro (A fixed fine of 10 € wi)
19 Overdue Notification Fine Type 2	No Overdue Fine (Default value - No Overdue Fine)
20 Overdue Notification Fine Type 3	No Overdue Fine (Default value - No Overdue Fine)
21 Overdue Notification Fine Type 4	No Overdue Fine (Default value - No Overdue Fine)
22 Overdue Notification Fine Type 5	No Overdue Fine (Default value - No Overdue Fine)
23 Block When Overdue	No block when overdue (Do not create a block when overdue)
24 Maximum Period For Overdue Block	No Maximum Block Period (No Maximum Block Period for Bi)
25 Reloan Limit	No Reloan Limit (No Reloan Limit)

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 Unit of Measurement) in which the same item may not be re-loaned - minutes, hours, days, weeks, or months.

[<](#) Policy Details Cancel Save

You are configuring: Ex Libris University

Policy Type **Reloan Limit**

Policy Name \*

Policy Description

Value Type \*  None  Parallel  Other

Value \*

Unit Of Measurement \*

Default Policy  False  True

A different copy of the same title with the same material type is considered as a single item for this policy.

## Does Alma support the concept of grace periods?

Alma supports grace time policies which allow additional time past an item's due date or time to prevent creation of a fine even when an item is overdue. Furthermore it is possible for staff users with certain rights to waive fines or fees.

13 Grace Period	<input type="text" value="Look-up or select"/>
14 Is Renewable	1 day 1 Day Grace Period (1 grace day. ALL days are counted, wi
15 Maximum Renewal Period	1 Hour Grace Period (1 grace hour. ALL hours are counted 1 Open Day Grace Period (1 grace day. Only open days are

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## Does Alma support postal loans to specified groups?

Alma allows for personal delivery of requested physical items to a user's office or home.

TOU policies cater for defining elements related to this:

8	Personal delivery	Personal Delivery - All (Deliver items to a home)
9	Personal delivery fee	Personal Delivery Fee - No Fee (Personal delive)

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## Can Alma suppress late notices or bills for certain types of materials?

This can be achieved by defining an Overdue and Lost Loan Profile. The profile allows for defining a policy based on parameters such as user group, loan status, location, library material type and more as can be seen in the following screen capture. If the flag 'Send notification' is not checked, overdue and billing notices will not be sent.

< Overdue and Lost Loan Profile Record Cancel

Active

Profile Type \* Overdue notification type 1

Send Notification

Create Overdue Loan Fine

Create Block

Days After Due Date 0

Days After Status Date 0

Loan Status

Library Main Library

Item policy Lab Loan

Days  Days  Open Days

User Group

Locations

Material Type Kit

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## What flexibility does Alma offer for defining pickup locations for requested items?

Pickup locations can be configured in the terms of use. The options can be define per user group. For example undergraduates might only be allowed to pick up from the owning library and faculty members can pick up from any library.

The terms of use and policies are gathered in Fulfillment units which determine details, locations and rules. The On shelf request policy offers the following options:

- **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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## Due dates

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## Can due dates be defined/calculated based on patron type, item type and location?

Rules may be set up to assign given terms of use based on location, item type and patron type:

Fulfillment Unit Rules Editor

Name \* Faculty loans to end of semester

Description user group = Faculty, Loan to end of semester

Created By Super User Created On 08/11/2011

Updated By Dawn Bennet Updated On 12/02/2015

Input Parameters

Name	Operator	Value
1 User Group	In List	Faculty
2 Item Policy	=	4 Week Loan
3 Location	=	Art Library - General

Output Parameters

Terms of Use \* Staff Regular Term Loan

TOU Details Add Terms Of Use

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## How would the due date of hourly loans be calculated if the library is open 24/7?

Calculated due dates are automatically adjusted to match the library open hours. If the library is defined as open 24/7 then there will be no automatic adjustment of the due date. A 4 hour loan made at 2.15 a.m. (for example), will be due at 6.15 a.m.

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## Limits

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### Can the library define loan limits - e.g. by material type and/or patron group?

Particular loan limits can be added in the policies.

Loan Limit Rules

	Enabled	Move Up	Move Down	Rule Name	Description
4	✔	▲	▼	Undergraduate Student	Undergraduate Students take out 10 books at a time
5	✔	▲	▼	Graduate Student	Graduates are allowed 10 items at one time
6	✔	▲	▼	Administrative Staff	Administrative Staff can take 10 BOOKS at one time
7	✔	▲	▼	Distance Learners	Distance Learners can take 15 items at one time
8	✔	▲	▼	Reference Books - 3 at one time	Loan limit of 3 for all users for Reference Material
9	✔	▲	▼	Walk In users	Walk In users can take 5 items at one time
10	✔	▲	▼	Limit of 1 iPad loan at a time	All users can take 1 iPad at a time
11	✔	▲	▼	All users - 5 DVDs at a time	All users - 5 DVDs at a time
12	✔	▲	▼	Education Library - Equipment loans	Education Library - Equipment loans - 3 for patron groups Faculty, Graduates, Undergraduates
13	✔	▲	▼	Public Library Borrowers	Public Library Borrowers can have 5 items out at a time.

The effect of a limit (such as loan limit) condition can also be defined. For example the library may define whether a cash limit condition will block only new loans or if it will also block renew actions, and who may override such a block.

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### What options are available for allowing staff to override system limits?

Override policies are configured by the library and only available to staff with the relevant roles and permissions.

The override configurations appear on the Block Preferences page (**Configuration Menu > Fulfillment > Physical Fulfillment > Block Preferences**):

Description	Actions	Handlers	Blocks
1 The loan regular due date conflicts with booking request	Override By All	Shorten the due date to the last possible c	
2 The renew due date conflicts with booking request	Handle Automatic	Shorten the due date to the last possible c	
3 Item is not loanable	Override By Manag		
4 Item is not renewable	Block		
5 Item cannot be loaned to patron - insufficient due date	Block		
6 This item can only be loaned from reading room desk	Block		
7 Item does not belong to this institution	Block		

### Block Preferences page

The following screen capture illustrates a library defined block that can be overridden by the staff operator:

User Jane Brown Is Blocked

▲ Cash - Limit of 25.00 USD exceeded. User has 43.00 USD.
 ✔ Overrideable

Override Cancel OK

The following example shows the same block that cannot be overridden by the staff operator who does not have override privileges. :

User Jane Brown Is Blocked

▲ Cash - Limit of 25.00 USD exceeded. User has 43.00 USD.

Cancel OK

## Can a limit be placed on the number of requests that a patron can have at one time?

Limits for requests (plus cash, overdues, bookings, etc.) may be setup per user group:

Patron Limits Definitions							
Table Description	Patron Limits Definitions			Managed in Network			No
Customization mode:	Entire table needs to be customized						
User group	Max. cash	Max. overdues	Max. bookings	Max. overdue recalls	Max. digitization requests	Max. physical item requests	
1 Administrativ	50	5	5	1	3	20	
2 Faculty	50	10	7	3	10	20	
3 Graduate Stu	30	5	3	1	7	20	
4 Undergraduar	25	5	3	1	50	15	
5 Alumni	40	3	1	1	3	20	
6 Guest	10	3		1	3	1	
7 Distance Lea	15	5	1	1	1	20	

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## Can a re-loan limit be defined?

Alma supports the option of defining a re-loan limit, preventing patrons from re-lending items that they have just returned. 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.
- Parallel – The patron may not check out two copies of the title at one time.
- Other – You may define the time span (in the Unit of Measurement) in which the same item may not be re-loaned - minutes, hours, days, weeks, or months.

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## Transit rules

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### Can transit times between libraries be configured?

Transit time rules enable Alma to calculate the feasibility and expected delivery times for fulfillment requests. When an item request is received, the fulfillment transit time rules are checked to determine the expected transit time based on the location of the item requested, the pickup location and, in some cases, the material type of the item (for example, moving an oversized item from one library to another may take longer than moving an average-sized item).

There is a default transit time rule that defines the delivery time when none of the transit time rules is met. This default rule can be modified, but out-of-the-box it is set to a 12-hour delivery time.

Institution Rules List						
Enabled	Move Up	Move Down	Rule Name	Description	Updated By	Update Date
<input checked="" type="checkbox"/>			Delivery Rule 1	Delivery from Main Library to Resource Sharing Library	Staff, Ex Libris	04/25/2016
<input checked="" type="checkbox"/>	▲	▼	Graduate Library to Main Library	Graduate Library to Main Library	Staff, Ex Libris	04/25/2016
<input checked="" type="checkbox"/>	▲	▼	Music Library to Science Library	-	Staff, Ex Libris	02/08/2016

Default Rule			
Rule Name	Description	Updated By	Update Date
1 Default Transit Time	Default time of transit 12 hours	Connie Braun	05/02/2012

When you define a new transit time rule, you can test the rule by calculating the estimated time of arrival (ETA) for a scenario in which the rule is applied.

Transit time rules can be configured at the institution level only.

## Can reshelving rules be configured without transit rules?

You can now relation rules between libraries so that transit for reshelving will not be required between certain libraries, departments, and circulation desks. This reduces redundant work effort by not automatically putting items in transit for reshelving when the libraries are close to each other. This does not affect other transit types, such as hold shelf, work order, and processing.

You configure these rules from the Reshelve Without Transit Rules page (**Configuration Menu > Fulfillment > Library Management > Reshelve Without Transit Rules**).

Rule Name	Description	Updated By	Update Date
1 Default reshelve without transit rule	Default reshelve without transit rule	Ex Libris	10/04/2018

## Blocks

### What configuration options are available related to blocking patrons?

In depth configuration is possible through user block definitions. You must first configure user block descriptions (you must select a description when configuring a definition).

Table code	UserBlockDescription	Table Description	User Block De
Patron Facing	Yes	Managed in Network	No
Customization mode:	Entire table needs to be customized		

Import

Filter: English

	Enabled	Move Up	Move Down	Code	Description	Translation
1	<input checked="" type="checkbox"/>			01	Patron consistently returns	Patron consistently returns books late
2	<input checked="" type="checkbox"/>	▲	▼	02	Disruptive behaviour in libr	Disruptive behaviour in library
3	<input checked="" type="checkbox"/>	▲	▼	03	Personal item left in library	Personal item left in library - contact Circ desk
4	<input checked="" type="checkbox"/>	▲	▼	04	Too many Claimed Returner	Too many Claimed Returned Items

User block descriptions also appear in the drop-down list when blocking a user.

The following parameters can be configured for block definitions:

- **Description** – Describes the block action; the reason for the block. This list includes all of your user block descriptions.
- **Blocked action** – Select the blocked action from one of the following (These blocked actions are preconfigured in Alma:
  - 01 – loan
  - 02 – loan, renew
  - 03 – loan, renew, hold
- **Type** – Select the type of block from one of the following:
  - Cash
  - Demerit
  - General
  - Loan
  - Resource sharing requests
  - User

The **Type** value is for information only and does not impact the system, **with the exception of the Demerit type**. Alma allows you to configure a **demerit system** that applies patron blocks (such as for loans) based on the number of demerits a user has accrued within a configured amount of time. Once a block is applied, the institution suspends the user for the configured number of days and subtracts the used demerit points from the user's record. If the user receives more demerit points while on suspension, these points and the user's remaining points may contribute to another suspension once the previous suspension period ends.

Table Description	User Block Definitions	Managed in Network	No
Customization mode:	Entire table needs to be customized		

Id	Type	Description	Overridable	BlockedAction	Updated By
1	Look-up or sel	All patron's privi	ALL	03	admin1
2	Cash	Always bothers t	ALL	03	admin1
3	Demerit	Borrower suspen	ALL	01	admin1
4	General	Bothers circulati	ALL	01	admin1
5	Loan	Disruptive behav	ALL	01	admin1
6	Resource Sharing Request	Patron consisten	ALL	01	admin1
7	User				
8	General				

- **Overridable** – Select whether the block is overridable from one of the following:

- ALL – The block is overridable by any circulation desk operator
- NONE – The block is not overridable
- CIRCDESC – The block is overridable only by a circulation desk manager
- OPERATOR – The block is overridable by a circulation desk manager or a circulation desk operator (and not a user with circulation desk operator – limited permissions)

	Id	Type	Description	Overridable	BlockedAction
1	01	General	All patron's privi	Q Look-up or sel	03
2	02	General	Always bothers t	ALL	03
3	03	General	Borrower suspen	NONE	01
4	04	General	Bothers circulati	CIRCDESC	01
				OPERATOR	

## What blocking options are available in Alma?

Alma supports automatic and manual blocking of patrons. Automatic blocks are applied based on library-defined rules; for example, if a patron has more than X number of overdue items, or owes the library above a library-defined threshold. These rules can vary for different item types and for different patron groups.

User Jane Brown Is Blocked

▲ Cash - Limit of 25.00 USD exceeded. User has 43.00 USD.

Cancel OK



In addition, patron specific blocks can be defined and assigned to a patron record. If any blocks have been placed, the circulation operator will be notified upon scanning the patron's ID.

Hold shelf notifications include an indication to the patron if blocks are expected to prevent the loan from taking place.

	Id	Type	Description	Overridable
1	01	General	All patron's privi	ALL
2	02	General	Always bothers t	ALL
3	03	General	Borrower suspen	ALL
4	04	General	Bothers circulati	ALL
5	05	General	Disruptive behavi	ALL
6	06	General	Patron consisten	ALL
7	08	General	Patron is blockec	ALL
8	09	User	Patron to contact	ALL

If any blocks have been placed on the user, the operator will be notified upon scanning the patron's ID. Circulation staff members with the relevant roles have the ability to override blocks, according to the policies determined by the institution.

## Loan blocked

 General - Patron consistently returns books late. .	 Overrideable
 General - Disruptive behaviour in library. .	 Overrideable

Patrons can view their blocks with descriptions in Primo in their My Account section:

### Blocks + messages

Alma University-

Please come to the main library, we have to speak about your overdues

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You left your umbrella in the library. You can pick it up at the Main Circ Desk

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See registrar

## Can block preferences be configured?

Block preferences can be configured in Alma, which will let the library control how various scenarios are handled at circulation desks within 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 has been 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.

	Description	Actions
1	The loan regular due date conflicts with booking request	<b>Override By All</b> ▾
2	The renew due date conflicts with booking request	<b>Handle Automatically</b> ▾
3	Item is not loanable	<b>Override By Manager</b> ▾
4	Item is not renewable	<b>Block</b> ▾
5	Item cannot be loaned to patron - insufficient due date	<b>Block</b> ▾
6	Item does not belong to this institution	<b>Block</b> ▾
7	Item is on Hold Shelf for this patron	<b>Handle Automatically</b> ▾
8	Item cannot be loaned due to booking request	<b>Block</b> ▾
9	Item has not been received by Acquisitions Department	<b>Block</b> ▾
10	Item is requested by another patron	<b>Override By All</b> ▾
11	Item renew period exceeded	<b>Override By Manager</b> ▾

The list of block preferences is predefined and cannot be added to or deleted, but the institution can modify its settings.

Block preferences are set at the institution level, and these preferences will apply to all libraries within the institution.

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## Can a patron be blocked if items on loan are returned late?

Alma supports a blocking policy so that a loan that is returned late will trigger a block on the user record, according to a library defined policy.

The block policy is set as part of the Terms of Use:

23	Block When Overdue	<input type="text" value="Look-up or select"/>
24	Maximum Period For Overdue Block	1 day block per 1 day overdue (1 day block per 1 day overc No block when overdue (Do not create a block when overd Number of blocking days (Number of blocking days)

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.

This block can be seen on the patron's record, and also when trying to perform certain actions, such as loaning an item.

The block is automatically lifted once the configured expiry date passes, as part of the Users – Remove Blocks job.

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## Overdues

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### Can Alma process overdue loans into lost items after a library-determined amount of time, and based on item type and patron group?

The library can create an automated/recurring daily batch job facility for processing lost loans. The Fulfillment Administrator can set the profiles by which overdue loans are considered lost, and the Administrator can set when and which overdue loans are changed to be considered lost automatically. Alma automatically uses these profiles to change the loans to a lost status on a daily basis.

Total views:

23281