
Configuring Loans

Note

This page describes how to configure loans including automatic loan renewal rules, overdue and lost loan profiles, etc. For links to all the main fulfillment documentation pages see [Fulfillment](#).

Configuring Block Preferences

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

- General System Administrator
- Fulfillment Administrator

Watch the [Overdue and Lost Loan Profiles](#) video.

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 (or requested by) the user; see [Creating a Request from the Institution](#). For details on policies for loan recall requests, see [here](#).

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.

Note

For configuring user blocks including demerits, consortial blocks, overdue loans, etc., see [Configuring User Blocks](#).

The block preferences that are defined for the institution appear on the Block Preferences page ([Configuration Menu > Fulfillment > Physical Fulfillment > Block Preferences](#)).

Description	Actions	Handlers	Blocks	Override in another institution
1 The loan regular due date conflicts with booking request	Override By All	Shorten the due date to the last possible date		<input type="checkbox"/>
2 The renew due date conflicts with booking request	Handle Automatically	Shorten the due date to the last possible date		<input type="checkbox"/>
3 Item is not loanable	Block			<input type="checkbox"/>
4 Item is not renewable	Override By Operator			<input type="checkbox"/>
5 Item cannot be loaned to patron - insufficient due date	Block			<input type="checkbox"/>
6 This item can only be loaned from reading room desk	Block			<input type="checkbox"/>
7 Item does not belong to this institution	Block			<input type="checkbox"/>
8 Item is on Hold Shelf for this patron	Handle Automatically	Delete the request and loan the item		<input type="checkbox"/>
9 Item is bound to a borrowing request for another patron	Block			<input type="checkbox"/>
10 Item cannot be loaned due to booking request	Block			<input type="checkbox"/>
11 Item has not been received by Acquisitions Department	Block			<input type="checkbox"/>
12 Item is requested by another patron	Handle Automatically	Restart the request, since the item is no longer av		<input type="checkbox"/>
13 Item renew period exceeded	Override By Manager			<input type="checkbox"/>
14 Item cannot be loaned from this circulation desk	Handle Automatically			<input type="checkbox"/>
15 Item cannot be returned at this circulation desk	Handle Automatically			<input type="checkbox"/>

Block Preferences Page

Note

- Block preferences can be configured at the institution level only. Select the required institution from the **Configuring** filter on the Fulfillment Configuration page.
- The **Not Renewable – Item Has Request(s)** entry indicates the system behavior when there are title level requests on the renewed item. Select **Handle Automatically** to permit request renewal when title level requests exist for the loaned item that is being renewed. Select any other option to reject loan renewal when title level requests exist for the loaned item that is being renewed. This parameter also controls the system behavior when attempting to renew material that was shipped for a lending resource sharing request (using resource sharing request renew), and there are title level requests for the resource. If you select **Handle Automatically**, it means that renewal requests are automatically accepted and the shipped material is automatically renewed to the requested new due date even though there are title level requests for the resource. Select any other option to reject the renewal requests.
- The **Item cannot be loaned to patron – insufficient due date** block indicates that the item cannot be loaned because the due date does not allow the item to be returned. For example, this block appears when an item's due date is in the past, or when an item is due tomorrow but delivery of the item cannot be completed for three days.

The list of block preferences is predefined. You cannot add or delete a block preference, but you can modify a block preference's settings. 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. In some cases, 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. In other cases, such as for block descriptions “Item cannot be loaned from this circulation desk” and “Item cannot be returned at this circulation desk”, the **Handler** field is empty. When the **Handler** field is empty, choosing **Handle Automatically** enables the activity to occur with no block. For example, if “Item cannot be loaned from this circulation desk” is defined with the **Handle Automatically** action, then an item from Library B which is not defined as “Circulate For” in Library A can be loaned (with no block) while at a circulation desk of Library A.

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:

Block Name	Description	Available Actions	Handlers
The loan regular due date conflicts with booking request	Checkout is blocked when the normal due date (as determined by the TOU, for example) conflicts with the start of an existing booking request.	<ul style="list-style-type: none"> • Block • Override by All • Override by 	Shorten the due date to the last possible date

Block Name	Description	Available Actions	Handlers
		Manager <ul style="list-style-type: none"> • Override by Operator • Handle Automatically 	
The renew due date conflicts with booking request	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.	<ul style="list-style-type: none"> • Block • Override by All • Override by Manager • Override by Operator • Handle Automatically 	Shorten the due date to the last possible date
Item is not loanable	Checkout 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.	<ul style="list-style-type: none"> • Block • Override by All • Override by Manager • Override by Operator 	
Item is not renewable	Loan renewal is blocked as a result of the fulfillment configuration. The applicable Terms of Use contains an Is Renewable policy with value False.	<ul style="list-style-type: none"> • Block • Override by All • Override by Manager • Override by Operator 	
Item cannot be loaned to patron - insufficient due date		Block	
This item can only be loaned from reading room desk	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, checkout is blocked.	<ul style="list-style-type: none"> • Block • Override by All • Override by Manager 	

Block Name	Description	Available Actions	Handlers
		<ul style="list-style-type: none"> • Override by Operator 	
Item does not belong to this institution		Block	
Item is on Hold Shelf for this patron	Checkout is blocked for an item when the item is on the hold shelf.	<ul style="list-style-type: none"> • Block • Override by All • Override by Manager • Override by Operator • Handle Automatically 	Delete the request and loan the item
Item is bound to a borrowing request for another patron	Checkout is blocked for an item because it was already requested by a different patron via Resource Sharing.	<ul style="list-style-type: none"> • Block • Override by All • Override by Manager • Override by Operator 	
Item cannot be loaned due to booking request		Block	
Item has not been received by Acquisitions Department		Block	
Item is requested by another patron	Checkout 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. The block also has no effect if the item is in another process, for example, a loan.	<ul style="list-style-type: none"> • Block • Override by All • Override by Manager • Override by Operator • Handle 	Restart the request, since the item is no longer available.

Block Name	Description	Available Actions	Handlers
		Automatically	
Item is requested by the library	Checkout is blocked for an item that is requested for an internal library process.	<ul style="list-style-type: none"> Block Override by All Override by Manager Override by Operator Handle Automatically 	Restart the request, since the item is no longer available
Item renew period exceeded	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.	<ul style="list-style-type: none"> Block Override by All Override by Manager Override by Operator 	
Item cannot be loaned from this circulation desk	<ul style="list-style-type: none"> 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. 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. 	<ul style="list-style-type: none"> Block Override by All Override by Manager Override by Operator Handle Automatically 	
Item cannot be returned at this circulation desk.	<ul style="list-style-type: none"> 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. 	<ul style="list-style-type: none"> Block Override by All Override by Manager Override by Operator Handle Automatically 	

Block Name	Description	Available Actions	Handlers
An item of the same title (items attached to the same bib record) was recently loaned to this patron	Reloaning an item is blocked as a result of the fulfillment configuration. The applicable Terms of Use contains a Reloan Limit policy with value Other.	<ul style="list-style-type: none"> • Block • Override by All • Override by Manager • Override by Operator 	
Item of the same title (items attached to the same bib record) is already on loan for this patron	Loaning an item is blocked as a result of the fulfillment configuration. The applicable Terms of Use contains a Reloan Limit policy with value Other.	<ul style="list-style-type: none"> • Block • Override by All • Override by Manager • Override by Operator 	
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.	<ul style="list-style-type: none"> • Block • Override by All • Override by Manager • Override by Operator 	
Item is on hold shelf for another patron	Checkout is blocked for an item that is currently on the hold shelf for a different patron.	<ul style="list-style-type: none"> • Block • Override by All • Override by Manager • Override by Operator • Handle Automatically 	Restart the request, since the item is no longer available
Item is on expired hold shelf for another patron'	Checkout is blocked for an item that is currently on the hold shelf for a different patron, although it is expired.	<ul style="list-style-type: none"> • Block • Override by All • Override by Manager • Override by Operator 	Cancel the expired request to enable the loan

Block Name	Description	Available Actions	Handlers
		<ul style="list-style-type: none"> Handle Automatically 	
Item of the same title (items attached to the same bib record) is already on loan for this patron. Parallel loan is prohibited.	Loaning an item is blocked as a result of the fulfillment configuration. The applicable Terms of Use contains a Reloan Limit policy with value Parallel.	<ul style="list-style-type: none"> Block Override by All Override by Manager Override by Operator Handle Automatically 	Cancel the request, since the item is no longer available
Lender policy does not support renewal	Resource sharing loan cannot be renewed because the lender's policy does not allow renewals.	<ul style="list-style-type: none"> Block Override by All Override by Manager Override by Operator 	
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.	<ul style="list-style-type: none"> Block Override by All Override by Manager Override by Operator 	
Patron's card has expired	Loaning an item is blocked for a patron with an expired user record.	<ul style="list-style-type: none"> Block Override by All Override by Manager Override by Operator 	
Patron is not active	Loaning an item is blocked for a patron with an inactive user record.	<ul style="list-style-type: none"> Block Override by All Override by Manager 	

Block Name	Description	Available Actions	Handlers
		<ul style="list-style-type: none"> • Override by Operator 	
Patron loan limit exceeded	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).	<ul style="list-style-type: none"> • Block • Override by All • Override by Manager • Override by Operator 	
Patron overdue limits exceeded	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.	<ul style="list-style-type: none"> • Block • Override by All • Override by Manager • Override by Operator 	
Patron overdue recalls limit exceeded	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.	<ul style="list-style-type: none"> • Block • Override by All • Override by Manager • Override by Operator 	
Not Renewable – Item has Request(s)	Blocks renewal of additional copies of an item that has been recalled.	<ul style="list-style-type: none"> • Block • Override by All • Override by Manager • Override by Operator • Handle Automatically 	
Item is currently on loan by another patron		<ul style="list-style-type: none"> • Block • Override by All • Override by Manager 	<ul style="list-style-type: none"> • Return the item and loan to the new patron — Do not waive overdue fines • (New for February 2026) Return

Block Name	Description	Available Actions	Handlers
		<ul style="list-style-type: none"> • Override by Operator • Handle Automatically 	<p>the item and loan to the new patron — Message user</p> <p>If this option is selected, a pop-up message appears when trying to loan the item, informing the user that the item is currently on loan to another patron, is checked in, and that overdue fees are incurred.</p> <p>If the user does not have the waive fines and fees privilege, then selecting the OK option in the pop-up checks in the loan and create the fees.</p> <p>If the user does have the waive fines and fees privilege, then selecting the OK option in the pop-up causes a second pop-up to appear, providing two options to waive the fees:</p> <ul style="list-style-type: none"> ◦ Waive fees — The check-out triggers a check-in of the existing loan and waive the fees ◦ Do not waive fees — The check-out triggers a check-in of the existing loan and not waive the fees <p>For self-check machines, the loan is blocked as if the block preference is set to block.</p> <ul style="list-style-type: none"> • (New for February 2026) Return the item and loan to the new patron — Waive overdue fines <p>See also Waiving Fines and Fees.</p>
A resource sharing request must be renewed by the resource sharing library		Block	
Item has not been received by resource sharing operator		<ul style="list-style-type: none"> • Block • Override by All • Override by 	Perform automatic resource sharing receive

Block Name	Description	Available Actions	Handlers
		Manager <ul style="list-style-type: none"> • Override by Operator • Handle Automatically 	
Time frame when loan renewal is allowed not reached	Renewal is blocked. The 'Time frame when loan renewal is allowed' policy allows renewals only when near the due date.	<ul style="list-style-type: none"> • Block • Override by All • Override by Manager • Override by Operator 	
User does not have a patron role or the role has expired		<ul style="list-style-type: none"> • Block • Override by All • Override by Manager • Override by Operator 	

Note that requests are not blocked in Alma. The rationale behind this is to allow patrons to place the request, but when they come to pick up the item, to force them to pay/return/solve the reason for their blockage before receiving the requested item. However, you can still create blocks on requests by creating blocks manually: when configuring a block manually, you choose which actions are blocked.

The Block 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 Block 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.

If the **Notify Automatic Renewals** checkbox ([Configuration > Fulfillment > Fulfillment Jobs Configuration](#)) is marked, then the Automatic Loans Renew Notice is sent for the renewals (see [Letters](#)).

Even where the rules allow for renewal, the renewal may still be prevented in situations such as the following:

- The user does not have a patron role, or the role has expired.
- The user record expires 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 enables 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 screenshot shows the 'Automatic Loan Renewal Rules' interface. It has two tabs: 'Rules' and 'Notes'. Below the tabs is a dropdown for 'Institution Rules List' with an 'Add Rule' button. A filter dropdown is set to 'All'. The main table lists three rules:

Enabled	Move Up	Move Down	Rule Name	Description	Updated By	Update Date	
<input checked="" type="checkbox"/>			Faculty and graduate auto renewal	Loans by faculty and graduates will be automatically renewed if not requested by other patrons	Thomas Safransky	05/01/2016	...
<input checked="" type="checkbox"/>	▲	▼	Visiting Student Rule	Auto-renewal off for foreign students on the Visiting Scholar program	Ex Libris Staff	01/05/2023	...
<input checked="" type="checkbox"/>	▲	▼	Researchers on Sabbatical	Auto-renewal on for visiting researchers	Ex Libris Staff	01/05/2023	...

Below the table is a 'Default Rule' section with a table:

Rule Name	Description	Updated By	Update Date	
1 Default Auto Loan Renewal Rules	Default Auto Loan Renewal Rules	-	01/05/2023	...

Automatic Loan Renewal Rules Page

Note

Automatic loan-renewal rules 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:

- Adding automatic loan-renewal rules (see [Adding Automatic Loan-Renewal Rules](#), below)
- Editing automatic loan-renewal rules (select **Edit** from the row actions).
- Enabling or disabling loan-renewal rules
- Duplicating automatic loan-renewal rules (select **Duplicate** from the row actions and modify the relevant fields)
- Deleting automatic loan-renewal rules (select **Delete** from the row actions).

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 an 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 (select **Edit** from the row actions).

To add a new automatic loan-renewal rule:

1. On the Automatic Loan Renewal Rules page (**Configuration Menu > Fulfillment > Physical Fulfillment > Auto Loan Renewal Rules**), select **Add Rule**. The Automatic Loan Renewal Rule Editor page appears.

2. Enter a name (required) and a description (optional) for the new rule.
3. In the **Input Parameters** section, select **Add Parameter**. A parameter-configuration box opens.
4. Under **Name**, select one of the categories of input parameters for which you want to specify conditions that must be met in order for this rule to apply. You can only create one set of conditions for each category of input parameter, but you can include many values for each parameter. For example, for the **Location** parameter, you can select multiple locations in a number of different libraries, or include all locations except for the law library and the art library.

The following parameter categories are available:

- **Library** – The library that owns the item
- **Location** – The location of the item within the library, such as the Asian collection or the multimedia center
- **User Group** – The user group of the patron who has the item on loan
- **User Statistical Category** – A statistical category that is attached to the user (see [Managing Users](#))

5. Under **Operator**, select the required **Operator**. (Select **InList** or **NotInList** if you want to select multiple values for the parameter.)
6. If the **Value** field appears, select the value or values of the parameter that define the condition that must be met.

7. Select **Add Parameter**. The parameter is added to the list of input parameters for the rule.
8. To add additional input parameters for the rule, in the **Input Parameters** section, select **Add Parameter**, and then repeat the previous steps. When you are finished, a set is created between one and four parameters. For example, 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.

Note

All the input-parameter conditions must be fulfilled for the rule to be applied. If they are not, the default rule is applied.

9. Under **Output Parameters**, select whether auto renewal should be implemented (**True**) or not (**False**).

The screenshot shows the 'Automatic Loan Renewal Rule Editor' interface. At the top, there are 'Cancel' and 'Save' buttons. Below the title bar, the rule name is 'Visiting Student Rule' and the description is 'Auto-renewal rule for foreign students on the Visiting Scholar program'. It also shows 'Created By: Ex Libris' and 'Updated By: Ex Libris' with dates of '01/05/2023'. The 'Input Parameters' section contains a table with three rows:

Name	Operator	Value
1 Location	In List	Art Library - General, Art Library - Rare Collection, Law Library - Course Reserves Collection
2 User Statistical Category	*	Local/Foreign - Foreign Students
3 User Group	In List	Undergraduate Student

Below the input parameters, the 'Output Parameters' section shows 'AutoRenewal' set to 'False'.

10. Select **Save**.
11. If you have defined more than one rule, on the Automatic Loan Renewal Rules page, you can 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) valid, 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

This configuration is applicable to institutions!

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 create fees and user blocks. The profile setup allows for flexibility to apply the rules based on the 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.

Note

For more information on use cases and configuration options for overdue and lost loans, see [Managing Patron Services at a Circulation Desk](#).

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.

The letter sent depends on the setting of the **switch_to_overdue_and_lost_loan_new_job** customer parameter. When this parameter is set to **true**, the notification sent is the Ful Overdue and Lost Loan Notification Letter. In this case, a single notification is sent to each patron for all overdue items whose criteria match a particular profile, listing all of the overdue items in that profile. For example:

- Notification Profile 1 sends a notification message for all items that are three days overdue.
- Notification Profile 2 sends a notification message for all items that are five days overdue.

When the **Loans - Overdue and Lost Item** job runs, the notification is sent, once after three days and again after five days (once for each matching profile).

If the **switch_to_overdue_and_lost_loan_new_job** customer parameter is set to **false**, the notification sent is the Ful Lost Loan Letter, and a separate letter is sent for each overdue item.

Note

The **switch_to_overdue_and_lost_loan_new_job** customer parameter must be set to **true** for user blocks to be applied. For more information, see [Configuring Other Settings](#).

For information about configuring these letters, see [Configuring Alma Letters](#).

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](#).

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](#)).

Enabled	Name	Profile Type	Create Overdue Loan Fine	Create Overdue Notification Fee	Description
<input checked="" type="checkbox"/>	Lost Loan Rules	Change to lost	<input type="checkbox"/>	-	-
<input checked="" type="checkbox"/>	Students Lost 45 Days in the Main Library	Change to lost	<input type="checkbox"/>	-	-
<input checked="" type="checkbox"/>	Students Notify 30 Days	Overdue notification type 1	<input checked="" type="checkbox"/>	✓	-
<input checked="" type="checkbox"/>	Visitors 14 Days	Change to lost	<input type="checkbox"/>	-	-

Overdue and Lost Loan Profile List Page

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 when adding a new Overdue and Lost Loan Profile step. The status update does not mark any loans as lost. In the case of a migration where notifications were sent from another system, the affected loans are 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 three days overdue, the new profile catches all loans that are already three or more days overdue, including loans that may be 30 days overdue. To prevent this and ensure the profile sends notices only for loans that become three days overdue after the profile has been created, use this option when defining the new profile. (See also [Loans Overdue Notification Status Update](#) below.)
- Enable or disable overdue and lost loan profiles.

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 triggers 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 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.

Note

In order for the additional elements, for instance **additional_info_1_type1** through **additional_info_1_type5**, to appear on the Full 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](#).

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.

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.

The screenshot shows a web form titled "Overdue and Lost Loan Profile Record". At the top right are "Cancel" and "Save" buttons. The form contains the following fields and options:

- Name ***: Text input with "Students Notify 30 Days".
- Description**: Large text area.
- Active**: Checked checkbox.
- Profile Type ***: Dropdown menu with "Overdue notification type 1".
- Send Notification**: Checked checkbox.
- Create Overdue Loan Fine**: Unchecked checkbox.
- Create Overdue Notification Fee**: Unchecked checkbox.
- Create Block**: Unchecked checkbox.
- Days After Due Date**: Text input with "30".
- Days After Status Date**: Text input with "30".
- Loan Status**: Dropdown menu.
- User Group**: Multi-select dropdown with "Consortium Member", "Graduate Student", and "Undergraduate Student".
- Days**: Radio buttons for "Days" (selected) and "Open Days".
- Library**: Dropdown menu with "Main Library".
- Locations**: Dropdown menu.
- Item policy**: Dropdown menu.
- Material Type**: Dropdown menu.
- Letter send format**: Dropdown menu with "Mail".

Overdue and Lost Loan Profile Record Page

- 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 applies to all of the above.

Note

- For the Loan Status field, the **Loan** status should not be used. The **Normal** status applies to a regular loan. For more information on loan statuses, see [Viewing Loan History](#).
- The profile is activated for loans that meet **all** the conditions specified in the profile (that is, a Boolean AND operator operates between fields).
- If the profile is set to mark the loan as lost, the loan is considered a lost loan. If the profile is set to mark the loan as overdue, then a notice is sent and blocks/fines are 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 renewal 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](#).
- By default, the Overdue and Lost Loan Profile filters the loans by the User Group at the time of the loan. If you prefer that the job should use the current user group of the user, please contact Ex Libris Support.

- To enable the profile, select the **Active** checkbox. 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

If an Overdue and Lost Loan profile is not enabled, you can still run it by selecting **Run Now** from the row actions list.

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. For the notification to be generated, the fine must also be created in the Terms of Use, under the relevant **Overdue Notification type (1 through 5)** policy.

This is a separate fine than the overdue fine policy which is applied upon returning the loaned item.

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 checkbox enables 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** checkbox 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 marked as lost, or the loan is deleted. Note that you cannot create a block on a loan with the lost status.
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.

Keep in mind that 1 day = 24 hours, so that if an item's due date is March 1, **Days After Due Date** = 0, and **Days** is selected, the item is considered lost on March 2.

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 **Loan Status** field refers to values such as **Normal**, **Renewed**, **Automatic Renewal**, and **Overdue Notification**. The number of days is calculated by calendar days.

For example, if **Loan Status** is defined as **Claim Returned** and **Days After Status Date** is 5, then Alma checks that the current loan status is **Claim Returned** and that the last change of the item loan was to **Claim Returned** and more than five days have passed since the last item loan change. Therefore, if an item's loan status is updated on April 1 and **Days After Status Date** = 5, the item is considered lost on April 6. (Note that a value of 0 is the same as leaving the field empty.)

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 is 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 are not aggregated. They are separated into two letters. Each one of those letters creates 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 updated profile.

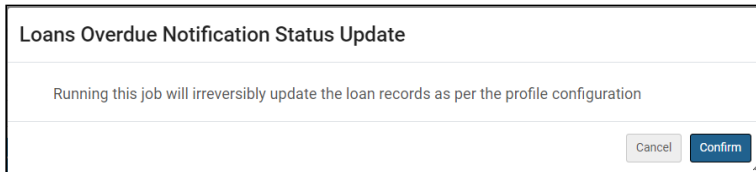
Loans Overdue Notification Status Update

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. The affected loans are marked to prevent the overdue and lost loan profiles from being handled again - meaning a loan fitting the criteria of lost and/or overdue notification profiles at the time of the status update do not become lost by them or trigger their notifications when the Overdue and Lost Loan job runs again. Running this job irreversibly marks the loan records so they are not handled by the matching profiles again.

Note

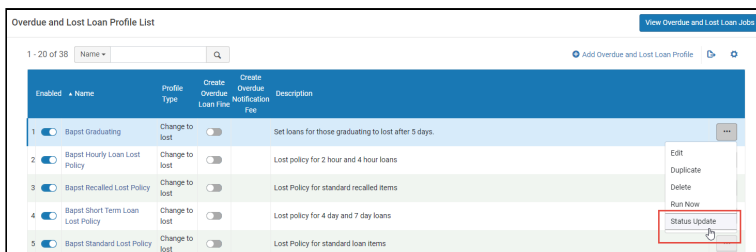
The Loans Overdue Notification Status Update page is only available in Alma if the 'switch_to_overdue_and_lost_loan_new_job' parameter is set to **true**.

Running the job displays a warning that the loan records are modified. Select **Confirm** to run the job.



Loans Overdue Notification Status Update Warning

If you want to run a status update only for a specific profile (e.g. notification profiles, but not profiles that set loans to lost), it is possible to apply the status update per profile from the Overdue and Lost Loan Profile List page (**Configuration Menu > Fulfillment > Physical Fulfillment > Overdue and Lost Loan Profile**) instead of using the job, which runs **all** profiles. To do so, in the row actions of the profile, select **Status Update**. (See also the [list of profile actions](#) above.)



Note

The status update job is designed mostly for post-migration handling, so when it runs it runs for all days, even if it's configured to run for open days only. The reason is that Alma doesn't have the calendar of the past for the newly migrated account.

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. 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:

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

With:

```
<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@@ @@decalred_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@@ @@decalred_as_lost_type2@@</h>
</td>
</tr>
</table>
</xsl:if>
</xsl:for-each>
```

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

```
@@additional_info_1@@
<br />
@@additional_info_2@@
```

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 Short Loan Reminders and Blocks

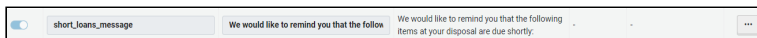
Short term loans are any loan with a due date policy defined with minutes or hours. Short term loans act like regular loans, with a few differences as described below.

Short Term Loan Reminders

There are 2 specific reminders for short loans, i.e., a courtesy reminder and an overdue reminder. The behaviour of these reminders is controlled by the settings in the following parameters:

- [short_loan_courtesy_reminder](#) - If this parameter is set, a courtesy reminder is triggered. The sending time for this reminder is based on the due date time less the value of the parameter. It uses the existing FulUserLoansCourtesyLetter letter (see [Courtesy Letter](#)).
- [short_loan_overdue_reminder](#) - If this parameter is set, an overdue reminder is triggered. The sending time for this reminder is based on the due date time plus the value of the parameter. It uses the [Ful Overdue And Lost Loan Notification Letter](#).

For both notifications, the letter is sent if the item was not returned and is not in **Lost** or **Claim Return** status. The loan due date time can change due to a renewal, recall, or manual change of due date. If there was a change in the due date, the new due date triggers the notification. The reminder is sent once (after the loan has been created). You can configure the courtesy letter with the **short_loans_message** label (see [Configuring Alma Letters](#)).



The letter templates include indicators for short term loans as shown in the example below (see [Configuring Letter Templates](#)).

```

<td>
        <xsl:if test="notification_data/short_loans='true'">
            <strong>@@short_loans_message@@</strong>
        </xsl:if>
        <xsl:if test="notification_data/short_loans='false'">
            <strong>@@message@@</strong>
        </xsl:if>
        <br/><br/>
</td>

```

Note

See also the [Short Loan Letter](#) that is sent to a patron when loaning an item for a short period.

Short Term Loan Blocking Policy

When an overdue letter is issued, if the [short_loan_overdue_block](#) parameter is set to true, and a blocking policy is configured, an overdue block is set for the patron. For information on creating a blocking policy, see [Configuring a Blocking Policy](#).

Lost Short Term Loans

Short term loans are changed to Lost after running the relevant Overdue and Lost Loan profile ([Configuration > Fulfillment > Physical Fulfillment > Overdue and Lost Loan Profile](#)), in the same way as for a regular loan.

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. For an overview of recall requests in Alma, see [Recall Requests](#).

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](#).

Code of the plan type	Display name of the plan type	Recalls Loans	Updated By	Last Updated
1 ELECTRONIC_TO_DIGITIZATI	Patron electronic digit	No	admin1	10/06/2018
2 GENERAL_DIGITIZATION	General digitization re	Yes	-	-
3 GENERAL_HOLD	General hold request	Yes	-	-
4 LIBRARY_ELECTRONIC_DIG	Library electronic digit	Yes	-	-
5 LIBRARY_PHYSICAL_DIGITI	Library physical digitiz	Yes	-	-
6 MOVE_TO_PERMANENT	Move permanently	Yes	-	-
7 MOVE_TO_TEMPORARY	Move temporarily	Yes	-	-
8 PATRON_PHYSICAL	Patron physical item r	Yes	-	-
9 PHYSICAL_TO_DIGITIZATIO	Patron digitization req	Yes	-	-

Request Configuration Mapping Table Page

The definitions of the different types are as follows:

Code	Type	Meaning
BOOKING	Booking request	Patron booking request
ELECTRONIC_TO_DIGITIZATION	Patron electronic digitization request	Patron digitization request for electronic resource
GENERAL_DIGITIZATION	General digitization request	Patron digitization request for item that is not catalogued
GENERAL_HOLD	General hold request	Patron physical item request for item that is not catalogued
LIBRARY_ELECTRONIC_DIGITIZATION	Library electronic digitization request	Digitization request from reading list for electronic resource
LIBRARY_PHYSICAL_DIGITIZATION	Library physical digitization request	Digitization request from reading list for physical resource
MOVE_TO_PERMANENT	Move permanently	Request for physical item to be moved to new location
MOVE_TO_TEMPORARY	Move temporarily	Request for physical item to be temporarily moved to new location
PATRON_PHYSICAL	Patron physical item request	Patron physical item request. See the Note below for some information about this parameter.
PHYSICAL_TO_DIGITIZATION	Patron digitization request	Patron digitization request for physical resource
RESOURCE_SHARING_E2D_SHIPMENT	Ship digitally from electronic	Internal digitization request by resource sharing staff for electronic resource
RESOURCE_SHARING_P2D_SHIPMENT	Ship digitally	Internal digitization request by resource sharing staff for physical resource
RESOURCE_SHARING_PHYSICAL_SHIPMENT	Ship physically	Internal physical item request by resource sharing staff
RESTORE	Restore item	Restore an item from temporary location

Code	Type	Meaning
STAFF_ELECTRONIC_DIGITIZATION	Staff electronic digitization request	Staff digitization request for electronic resource
STAFF_PHYSICAL_DIGITIZATION	Staff digitization request	Staff digitization request for physical resource
TRANSIT_FOR_RESHELVING	Transit for reshelving	Transit physical item for reshelving

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 is not recalled. Only if **Recalls Loans = Yes** is the Terms of Use policy applied.
- If **PATRON_PHYSICAL = Yes** and the Terms of Use fulfillment policy is **No Recall**, items are nevertheless marked as **Recalled**, to prevent renewals (although the loan due date is not changed).
- The block preference **Not Renewable - Item has Requests** is relevant only if **PATRON_PHYSICAL = Yes** (see [Configuring Block Preferences](#)).
- Loan recall requests can be configured at the institution level only. Select the required institution from the **Configuring** filter on the Fulfillment Configuration page.

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 the **Recalls Loans** column is enabled for editing.
2. Select **No** in the Recalls 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 Process Status Names

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

- General System Administrator
- Fulfillment Administrator

You can configure the loan process 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.

Code Table Cancel Customize

You are configuring: [Clean Training](#) [Change Organization Unit](#)

LOAN_PROCESS_STATUS i v

Table code: `HitemLoan_processStatus` Table Description: `Loan Process Status Search Column`

Patron Facing: `Yes`

Customization mode: `Entire table needs to be customized`

[Restore Default Translations](#)

Filter: English

Enabled	Move Up	Move Down	Code	Description	Translation	Default Value	Updated By	Last Updated
<input checked="" type="checkbox"/>			NORMAL	Normal	Normal	<input type="radio"/>	-	-
<input checked="" type="checkbox"/>			MEDIATED_RENEWAL	The renew request will be handled	The renew request will be handled by the appropriate library staff	<input type="radio"/>	-	-
<input checked="" type="checkbox"/>			RENEW	Renewed	Renewed	<input type="radio"/>	-	-
<input checked="" type="checkbox"/>			LOST	Lost	Lost	<input type="radio"/>	-	-
<input checked="" type="checkbox"/>			OVERDUE_LOST	Lost with overdue charge	Lost with overdue charge	<input type="radio"/>	-	-
<input checked="" type="checkbox"/>			CLAIMED_RETURN	Claim returned	Claim returned	<input type="radio"/>	-	-
<input checked="" type="checkbox"/>			OVERDUE_CLAIMED_RETURN	Claim returned with overdue chs	Claim returned with overdue charge	<input type="radio"/>	-	-
<input checked="" type="checkbox"/>			READING_ROOM_AT_USER	Reading room with user	Reading room with user	<input type="radio"/>	-	-

Loan Process Status Names Configuration Mapping Table Page