

# Alma Terms of Use Logic

When you attempt to check out an item to a patron, Alma undertakes the following logical checks to determine A) if the item can be loaned to the patron and B) if loaning is allowed, what due date and loan policy (which defines aspects like grace period, fines to be assessed in case of overdue, which notices to send, etc.) to apply to the loan:

1. Check Item Location →
2. Match Location to Fulfillment Unit →
3. Check for any Fulfillment Unit Exceptions (e.g., based on item policy, such as 2Hours) →
4. Match Patron Group to Fulfillment Unit Rule →
5. Check open hours / days closed →
6. Apply Fulfillment Unit Rule

## Example A: Faculty Annual Loans

Under the Fulfillment Configuration Menu:

### OPENING HOURS

1. Add the Event per the instructions in KCS/FAQ "Add or modify "End of Term" event, for loans and renewals due date (e.g. at new semester)"

### ADVANCED POLICY CONFIGURATION

1. Remember to be currently at the Institution level
2. Filter "Policy Type" to "Due Date"
3. Add or use an existing policy > Edit > Make sure the Value uses the Event defined above

### TERMS OF USE AND POLICIES

1. Filter to: "Terms of Use" of type "Loan"
2. Find or create the End of Term TOU
3. The "Due Date" drop-down menu will use the policy defined above
4. Next > Save

### FULFILLMENT UNITS

1. Edit the relevant unit
2. Go to the "Fulfillment Unit Rules" tab
3. Remain on the default "Rule Type" of "Loan"
4. Add a rule that will apply for this type of loan (based on User Group, Item Policy, etc.)
5. The Rule should be placed so that when Alma reads, from top to bottom, it will land on the best matching rule
6. Save

Note: I believe we will have to update the date of the annual due date every January 1st. For example, after January 1, 2017, we'll have to change the end of semester event to be due February 28, 2018.

Sample patron: test, professor (999999999999991)

Sample item: [30700107910951](#) (Lord of the Rings, Reserve Desk)

### **Example B: 2 Hour Reserve Loans for Students, Staff, and Guests (former Millennium iType 2Hour / Alma item policy 2Hour)**

#### ADVANCED POLICY CONFIGURATION

1. Remember to be currently at the Institution level
2. Filter "Policy Type" to "Due Date"
3. Add or use an existing policy for 2 Hour Loans > Edit > Make sure the Value is 2 and the Unit of Measurement is in Hours

#### TERMS OF USE AND POLICIES

1. Filter to: "Terms of Use" of type "Loan"
2. Find the 2Hour TOU
3. The "Due Date" drop-down menu will use the 2Hour Policy
4. Next > Save

#### FULFILLMENT UNITS

1. Edit the "Reserves" unit
2. Go to the "Fulfillment Unit Rules" tab
3. Remain on the default "Rule Type" of "Loan"
4. Add a rule based on Item Policy → In List → 2Hour
5. The Rule should be placed so that when Alma reads, from top to bottom, it will land on the best matching rule
6. Save

Sample patron: Test, Undergraduate (999999999999999)

Sample item: [30700112087076](#) (Curious Writer, Reserve Desk)

### **Example C: Reference / No Loan**

Sample patron: Test, Professor 999999999999991

Sample Item: [30700111620281](#)