



# Overdue and Lost Loan Profiles

Timothy Jackson  
SUNY Library Shared Services (SLSS)

# Agenda

- Overview of Overdue and Lost Loan Profiles
- Other functions related to overdue items
- Configuring Overdue and Lost Loan Profiles
- Overdue and Lost Loans Job
- Fulfillment Configuration Utility
- Questions

# Overview of Overdue and Lost Loan Profiles

- Overdue and Lost Loan Profiles do the following things:
  - Monitor long overdue loans and turn them into lost loans
  - Send overdue email reminders to users
  - Create fees and blocks
- Overdue and Lost Loan Profiles do not:
  - Send due date reminders (Send Overdue Notices Job)
  - Establish Grace Periods (Loan Terms of Use)
  - Create hourly/daily overdue fines (Loan Terms of Use)
  - Create lost item fines/fees (Loan Terms of Use)
  - Set patron limits (Patron Limits)

# Send Overdue Notices Job

- AKA “Notifications - Send Due Date Reminders”
- Sends daily email listing all items due on that date (FulUserOverdueNoticeLetter)
- Must be turned on in Configuration | Fulfillment | General | Fulfillment Jobs Configuration
- You can configure how many days before the due date the reminder notification should be sent

# Grace Periods

- Grace Periods determine how long an item must be overdue before fines are assessed
- Can be configured in minutes, hours, days, weeks, or months
  - Days: includes due date
  - Exact Days: does not include due date
- Once fine is assessed, the grace period will count towards the total fine amount

# Hourly/Daily Overdue Fines

- Fines assessed once an item becomes overdue
- Configuration options:
  - Configured in minutes, hours, or days
  - Can include or exclude times you are closed
  - Can configure separate fines for regular overdues and recalls
  - Can configure maximum fine amount

# Lost Fines and Replacement Fees

- Lost Item Fines are fines assessed when an item is declared lost
  - Separate from hourly/daily overdue fines
- Lost Item Replacement Fees are flat replacement fees assessed when an item is declared lost
- Lost Item Replacement Fee Refund Ratio determines what percentage of the Lost Item Replacement Fee is refunded if a lost item is returned

# Configuring Grace Periods, Daily Overdue Fines, and Lost Fines/Fees

- You must first create a policy in Advanced Policy Configuration (Configuration | Fulfillment Physical Fulfillment | Advanced Policy Configuration)
- Next you add the policy you created to Loan Terms of Use (Configuration | Fulfillment Physical Fulfillment | Terms of Use and Policies)



# Patron Limits

- Can block patrons based on total fine amount or number of overdue items
- Can be configured separately for different user groups
- To configure, go to Configuration | Fulfillment | Patron Configurations | Patron Limits

# Short Term Loans

- Short Loans are defined as any loan with a loan period measured in minutes or hours
- FulOverdueAndLostLoanNotificationLetter sent based on **short\_loan\_overdue\_reminder** setting
- Blocks placed based on **short\_loan\_overdue\_block** setting
- To configure these settings, go to Configuration | Fulfillment | General | Other Settings

# Demo

- Send Overdue Notices Job
- Creating Policies
- Adding Policies to TOUs
- Short Term Loans

# Configuring Overdue and Lost Loan Profiles

- Need either the General System Administrator or Fulfillment Administrator role
- Configured at the institution level
- To configure, go to *Configuration | Fulfillment | Physical Fulfillment | Overdue and Lost Loan Profile*

# Configuring Overdue and Lost Loan Profiles

- Types of Overdue and Lost Loan Profiles
  - Overdue Notification Type 1-5
    - Sends FulOverdueAndLostLoanNotificationLetter (warning that an item will be declared lost)
    - Can apply a fine and/or fee
    - Fines/fees can differ based on notification type number
    - Can also configure email differently for Type 1-5
  - Change to Lost
    - Sends FulOverdueAndLostLoanLetter (notification that an item has been declared lost)
    - Can apply a fee

# Configuring Overdue and Lost Loan Profiles

- If configuring a fine for Overdue Notification Type 1-5, you will first need to create the fine policy and then add the policy to your Loan TOUs
- If configuring a block, you will need to:
  - Add the block description to the User Block Description table
  - Set block parameters in the User Block Definitions table
  - Both tables found in *Configuration | Fulfillment | Physical Fulfillment*
  - [https://knowledge.exlibrisgroup.com/Alma/Product\\_Documentation/010Alma\\_Online\\_Help\\_\(English\)/030Fulfillment/080Configuring\\_Fulfillment/060Patron\\_Configurations/#Configuring\\_User\\_Block\\_Descriptions\\_and\\_Definitions](https://knowledge.exlibrisgroup.com/Alma/Product_Documentation/010Alma_Online_Help_(English)/030Fulfillment/080Configuring_Fulfillment/060Patron_Configurations/#Configuring_User_Block_Descriptions_and_Definitions)

# Configuring Overdue Notification Type 1-5

Name *	<input type="text" value="Test Profile"/>
Description	<input type="text" value="Test profile for training purposes"/>
Active	<input checked="" type="checkbox"/>
Profile Type *	<input type="text" value="Overdue notification type 1"/>
Send Notification	<input checked="" type="checkbox"/>
Create Overdue Loan Fine	<input type="checkbox"/>
Create Overdue Notification Fee	<input type="checkbox"/>
Create Block	<input type="checkbox"/>
Days After Due Date	<input type="text" value="1"/>
Days After Status Date	<input type="text" value="0"/>
Loan Status	<input type="text"/>
Library	<input type="text"/>
Item policy	<input type="text"/>
Letter send format *	<input type="text" value="Mail"/>

Days  Open Days

**Days**

User Group	<input type="text"/>
Locations	<input type="text"/>
Material Type	<input type="text"/>

# Configuring Change to Lost

Name *	<input type="text" value="Test Profile"/>
Description	<input type="text" value="Test profile for training purposes"/>
Active	<input checked="" type="checkbox"/>
Profile Type *	<input type="text" value="Change to lost"/>
Create Overdue Notification Fee	<input type="checkbox"/>
Days After Due Date	<input type="text" value="1"/>
Days After Status Date	<input type="text" value="0"/>
Loan Status	<input type="text"/>
Library	<input type="text"/>
Item policy	<input type="text"/>
Letter send format *	<input type="text" value="Mail"/>

Days  Open Days

**Days**

User Group	<input type="text"/>
Locations	<input type="text"/>
Material Type	<input type="text"/>



# Configuring Overdue and Lost Loan Profiles

- When you make a change to an overdue and Lost Loan profile, you'll see a message stating "It is recommended to run Status Update for the updated profile"
- To run the Status Update job, go to *Fulfillment | Advanced Tools | Loans Overdue Notification Status Update*
- Running this job does not create blocks or fines and fees, change loans to lost, or generate notifications
- The job ensures that duplicate notices aren't sent

# Configuring Overdue and Lost Loan Profiles

- You can configure as many Overdue Notifications as needed
- It is possible to send Overdue Notifications after an item has been declared lost, so be careful when configuring!
- Please do not apply Change to Lost profiles to resource sharing borrowing requests

# Overdue and Lost Loan Job

- Overdue and lost loan profiles will not do anything unless **Loans - Overdue and Lost Loan Job** is running
- Can be set to run daily or every Friday
- To configure, go to Configuration | Fulfillment | General | Fulfillment Configuration Jobs

Loans - Overdue And Lost Loan Job	
Status <input checked="" type="radio"/> Active <input type="radio"/> Inactive	Schedule
Loans - Due Date Correction after Calendar Change	
Status <input type="radio"/> Active <input checked="" type="radio"/> Inactive	Schedule
Requests - Handle Expiration Step	
Status <input type="radio"/> Active <input checked="" type="radio"/> Inactive	Schedule

Q Look-up or select ▾

- Not scheduled
- Every Friday at 19:00
- Every day at 02:00
- Every day at 19:00
- Every day at 21:00
- Every day at 23:00

# Overdue and Lost Loan Job

- You can view Overdue and Lost Loan Job history or run a profile without waiting for the Overdue and Lost Loan Job to run

Overdue and Lost Loan Profile List Back View Overdue and Lost Loan Jobs

1 - 3 of 3   + Add Overdue and Lost Loan Profile 🔗 ⚙️

Ena	Name	Profile Type	Create Overdue Loan Fine	Create Overdue Notificatic Fee	Description	
<input checked="" type="checkbox"/>	Lost Notice	Change to lost	<input type="checkbox"/>		-	<span>⋮</span>
<input checked="" type="checkbox"/>	Overdue Notice 1	Overdue notification type 1	<input type="checkbox"/>		-	
<input checked="" type="checkbox"/>	Overdue Notice 2	Overdue notification type 1	<input type="checkbox"/>		-	

- Edit
- Duplicate
- Delete
- Run Now
- Status Update

# Fulfillment Configuration Utility

- Can be used to test TOU and Overdue and Lost Loan Profile settings
- You enter a user and item barcode, and the FCU will tell you which TOUs and Overdue and Lost Loan Profiles apply
- Also calculates fines based on return date you enter
- To use, go to *Fulfillment | Advanced Tools | Fulfillment Configuration Utility*