It is sometimes necessary for us to apply blocks to patron accounts to prevent loans, requests, and I-Share use. Some reasons for blocks may include:

* Excessive Fines
* Excessive Overdue Items
* Overdue Library of Things Items
* Overdue Feature Films Items
* Block requests from other I-Share institutions
* Damage to library materials
* Belligerent behavior

Other blocks may be placed at the discretion of library staff.

In Alma, blocks can be configured by any user with access to the fulfillment configuration tab. Alma uses both normal blocks and patron limits to block library usage. Patron limits are automatic and can only be configured to certain parameters. Blocks are much more configurable, but require more work to set up. Their automation is not very useful in the current (2022) iteration of Alma.

Configuring Patron Limits

While patron limits are similar to a block, they are actually a bit different. They are used to apply limits to multiple fulfillment processes: total fees, number of overdue items, number of requests, etc. For the purpose of using this feature as a type of block, we will focus on number of overdue items and total fees. Follow the steps below to configure these limits.

1. Navigate to the configuration tab, and select **Fulfillment**
2. Under **Patron Configurations**, select **Patron Limits**
3. Look at the **User Groups** column and identify the group for which you would like to set a limit.
   1. If you do not see your group listed, you will need to select **add a row** and use the drop-down menu to find the appropriate user group
      1. Note that the user group must be configured before the limit
4. Where the appropriate user group row intersects with the max. cash column, enter the total fees which the user can accumulate before being blocked
5. Where the appropriate user group row intersects with the max. overdues column, enter the number of overdue books which the user can accumulate before being blocked
6. Make sure to click **save** when any changes are made
7. Test your changes using a dummy account

Configuring Blocks

There are two steps to creating blocks: block descriptions and block definitions. Block descriptions must be created before block definitions.

User Block Descriptions

1. Navigate to the configuration tab and select **Fulfillment**
2. Under **Patron Configurations**, select **User Block Descriptions**
3. To add a new block:
   1. Select **Add Row**
   2. Enter a name for the block under Code
   3. Enter a brief description for the block
   4. DO NOT adjust the default value field
4. To edit an existing block, just delete the old value and type in the new information.
5. You can also use the **…** to the right of the block to delete it
6. When done with any changes, make sure to click **save**

User Block Definitions

1. Once a description is created, reopen the fulfillment configuration tab
2. Under **Patron Configurations**, select **User Block Definitions**
3. On this page:
   1. ID: enter the User Block Description code (the name you gave your block)
   2. Type: this value is for information only and does not impact the system, with the exception of the Demerit and Consortial Block type.
      1. Select General if you aren’t sure, this is purely descriptive and doesn’t impact how the block operates
      2. Only use Consortial if this block is for all I-Share institutions
   3. Description: select the appropriate User Block Description
   4. Overridable: this will determine who can override the block
      1. ALL – The block is overridable by any circulation desk operator
      2. NONE – The block is not overridable (DO NOT USE)
      3. CIRCDESC – The block is overridable only by a circulation desk manager
      4. OPERATOR – The block is overridable by a circulation desk manager or a circulation desk operator
   5. Blocked Action:
      1. 01 – blocks local loaning only
      2. 02 – blocks local loaning and renewals
      3. 03 – blocks local loaning, renewals, and all hold requests
      4. 04 – consortial block which blocks all fulfillment at all I-Share institutions
   6. Network Block:
      1. Just leave this as FALSE
4. When creating a new block, click **Add New Row** and fill out the fields as explained above
5. To edit an existing block, simply use the field drop-drown menus to update their definitions
   1. NOTE: You cannot change an Id once the block has been created. If you need to change this you will need to delete and start from scratch
6. To delete a block definition, click the **…** to the right of the block and select **delete**
7. After any changes, click **save**

Automating Blocks

In order to automatically apply blocks, you must associate them with an overdue and lost loan profile. Please note: if you use this method to automatically apply blocks, the blocks will then be removed when the item goes into lost status. This type of automation is only useful to manage accounts between the beginning of the overdue status until the item is labeled lost by Alma (35 days for general collection).

For a block you would like to apply automatically, decide which overdue profile with which you would like to associate it. The block will be applied when the lost and overdue loan job runs and applies that corresponding profile. For example, if you associate your block with the local 7 day overdue profile, the block will be applied to an account when an item rolls over into 7 days overdue. The block will then be automatically removed if the item is returned or goes into lost status.

To automate a block:

1. Under the fulfillment configuration tab, navigate to **Overdue and Lost Loan Profile**
2. Click the name of your selected overdue profile
3. Click the **Create Block checkbox**
4. In the drop-down menu, select your block
5. Click **save**
6. Keep an eye on the overdue and lost loan job to make sure your block is applying properly.

Manually Applying Blocks

Once blocks have been properly configured, they can be manually added to a patron’s profile. This can be done individually or through a job. These blocks will need to be manually removed unless an expiry date is specified.

Individual Blocks:

1. Navigate to the patron’s account
2. Click the **Blocks** tab
3. Click **Add Block**
4. Select the desired block and expiry date. Add a note if needed.
   1. DO NOT check the add as external box
5. Click **Add and Close**

Block Job:

1. If you have a long list of users you would like to block, you must:
   1. Identify them through a query which you save as a set
   2. Or create an itemized set with their primary identifiers
2. Once you have a saved set of users, click the **Admin** tab
3. Select **Run a Job**
4. Select **Update/Notify Users** and click **Next**
5. Click your desired set and again click **Next**
6. Click the checkbox next to **Add Block Type**
   1. Make sure to select the desired block in the drop-down menu
   2. Then click **Next**
7. Make sure that the displayed job matches what you entered then click **Submit**
8. Navigate to **Monitor Jobs** and check the status of your job
   1. If it errors, you may need to do some troubleshooting
9. Once the job has successfully run, check a couple of the accounts to make sure the block was applied

Removing Blocks

Automatic blocks will be removed when the item is returned or if the item goes into lost status.

Manual blocks will be removed if an expiry date is set, otherwise they need to be manually removed. The block configuration will determine who can override and remove these blocks.

Individual Blocks:

1. Navigate to the patron’s account
2. Click the **Blocks** tab
3. Click the **…** next to the desired block
4. Click **delete**
   1. You can also click **edit** and set an expiry date

If you have numerous blocks to remove, you can also run a job to remove them. Simply follow the Block Job steps above, but instead of **Add Block** click the **Disable Block** box and select the block in the drop-down menu.