

Linked Patron Accounts

How to update a Linked Patron Account

Patron linked accounts can be updated in several ways.

1. If a patron renews an item on loan from partner institution, the patron's expiry date will automatically be updated to match the expiry date at the home institution.
2. If a patron requests a new item from a partner institution, the patron's expiry date will automatically be updated to match the expiry date at the home institution.
3. A staff member can manually force an update to a linked patron's expiry date by using "Manage Patron Services".

Fulfillment --> Checkout/Checkin --> Manage Patron Services --> Patron Services page

- Select "Find user in other institution", select the appropriate institution.
 - Scan patron's ID or search for patron and select appropriate one.
 - "Find User" (This will force an update to the patron's linked account).
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How Linked Patron Accounts are configured

Linked Account Rules (Institution Zone)

Each institution in the WRLC network has configured a **WRLC Fulfillment Network Patron** linked account rule in their Institution Zone (minus Catholic University Law school, which does not borrow nor lend using the WRLC AFN).

Below are the recommended configurations for the **WRLC Fulfillment Network Patron** linked account rule, found in

Configuration > User Management > Collaborative Networks > Linked Account Rules

Input Parameters		
Name	Operator	Value
1 Source Institution	In List	University of the District of Columbia Law School, American University Washington College of Law, Catholic University of America, Gallaudet University Library, George Mason University Libraries, George Washington University, George Washington University Himmelfarb Health Sciences Library, George Washington University Jacob Burns Law Library, Georgetown University, Georgetown University Law Library, Howard University, Marymount University, Shared storage institution, The University of the District of Columbia

Output Parameters	
User Group	wrlc user
Expiry Date	-
Expiry From Source	Same as in source
Refresh Expiry Date	Yes
Purge Date	-
Purge After Expired	One month after expiration
Refresh Purge Date	Yes
Resource sharing library	American University Library
Resource sharing library	
Copy Network Blocks	Yes

- Input Parameters
 - Name = Source Institution
 - Operator = In List
 - Value = all institutions in the WRLC Network except for Catholic Law
- Output Parameters
 - User Group = *wrlc user*
 - Expiry Date = NULL
 - Expiry from Source = Same as in source

Copies Expiry Date from the patron account in the patron's Home Institution

- Refresh Expiry Date = Yes

When set to 'Yes', the corresponding date is recalculated each time the linked record is refreshed from the source institution

- Purge Date = NULL
- Purge After Expired = One month after expiration

The above sets the Purge Date; the account will only be purged if the 'Purge User Records' job is run

- Refresh Purge Date = Yes

When set to 'Yes', the corresponding date is recalculated each time the linked record is refreshed from the source institution

- Resource Sharing Library = [your institution's resource sharing library]
- Copy Network Blocks = Yes

When set to 'Yes', Alma will delete all the current network blocks that exist on the linked account and re-create them each time the linked record is refreshed. Blocks can only be placed on linked accounts if they are configured in the **User Block Definitions** and **User Block Descriptions** section.

For more information, please see the [Configuring Linked Account Rules page](#) on the Alma Knowledgebase.

Linked Account Shared Fields (Network Zone)

The configuration that determines which fields in the user account are shared in linked accounts is managed in the WRLC Network Zone. Below is the current configuration.

Field Name	Shared
First Name	True
Middle Name	True
Last Name	True
Pin Number	False
Job Title	True
Job Description	True
Preferred Language	True
Birth Date	True
Expiry Date	True
Purge Date	True
Email List	True

Address List	False
Phone List	False
Preferred First Name	True
Preferred Middle Name	True
Preferred Last Name	True

For more information, please see the [Configuring Linked Account Shared Fields](#) page on the Alma Knowledgebase.

Revision #2

Created 17 January 2024 00:45:50

Updated 29 January 2026 15:30:14 by Jackie Saavedra