

# Terms of Use (TOU)

A **Terms of Use** is a bundle of specific **fulfillment policies** (such as loan periods, fine structures, and renewal options) that are applied to items, patrons, or services within a library.

- TOUs are attached to **Fulfillment Unit Rules** to determine the policies applied when a patron requests a service (e.g., a Loan, Request, or Booking).
- Any changes made to a policy within a TOU are immediately applied wherever that TOU is in use.

For more information on TOUs, please see Alma Knowledgebase page [Configuring Terms of Use](#).

## Configuring Terms of Use

1. Navigate to the **Terms of Use Management** page (**Configuration Menu > Fulfillment > Physical Fulfillment > Terms of Use and Policies**).

Configuring: American University

### Terms of Use Management

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[+ Add a Terms Of Use](#)

Terms Of Use Type: All

Name	Type	TOU Owner	Description	
1 CLS Lending - Faculty	Lending Resource Sharing	Network	This is not used (AFN does not use Lending Resource Sharing)	...
2 WRLC Media requesting	Request	Network	Requestable but not digitizable	...
3 WRLC Media lending	Loan	Network	Media loans in the CLS fulfillment network	...
4 WRLC Limited requesting	Request	Network	Digitizable but not requestable	...
5 WRLC FN requesting	Request	Network	Terms for requesting in the CLS fulfillment network	...
6 No patron role expiry	User Registration	Network	Uses patron account expiration date for patron role expiry.	...
7 No FN Requesting	Request	Network	Request TOU for non-lending Fulfillment Network partners	...
8 In Library Use Only - Periodicals	Request	Network	To be used for shared periodicals and any others that can be requested for "In Library Use Only"	...
9 Default terms of use	User Registration	Network	Default User Registration Terms - updated for no patron role expiry	...
10 Default terms of use	Borrowing Resource Sharing	Network	Allow Outgoing Resource Sharing Requests for CLS	...
11 Default Non-circulating	Loan	Network	Default to non-circulating – use in last FU rule with no parameters	...
12 CLS Lending - nonFaculty	Lending Resource Sharing	Network	This is not used (AFN does not use Lending Resource Sharing)	...

2. Select **Add Set of Terms of Use** to start the configuration wizard.

### 3. **Step 1: General Information**

- Enter a **Name** (required) and an optional **Description**.
- Select the **Type** (e.g., Loan, Request, Booking, or Resource Sharing).
- Select **Next**.

### 4. **Step 2: Policies**

- This page lists all the policies that will be included in this TOU (e.g., Loan Policy, Fine Policy, Request Policy).
- Select a policy from the drop-down list for each policy type.
- To create a new policy, select **Add** from the row actions list.
- To edit an existing policy (which will change it everywhere it's used), select **Edit**.
- Select **Next**.

### 5. **Step 3: Review**

- Review the details of the new TOU set.
- Select **Save** to finalize and add the new Terms of Use to the list.

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## Viewing Related Fulfillment Rules

You can easily see which Fulfillment Unit Rules are using a specific TOU:

1. On the **Terms of Use Management** page, select **Show Related Fulfillment Rules** from the row actions list for a specific TOU.
2. The resulting page displays all the rules that currently employ that Terms of Use.

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## Using TOUs in Fulfillment Units

TOUs are attached to specific **Fulfillment Units** via **Fulfillment Rules**. Each Fulfillment Rule uses one TOU, and the rules determine when the specific TOU is applied to a transaction.

**For instructions on how to associate TOUs with specific Fulfillment Rules, please see the WRLC Alma wiki page [Fulfillment Unit Rules](#).**

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## Configuring Maximum Renewal TOU

**NOTE: To maintain compliance with WRLC Alma Fulfillment Network (AFN) Lending agreed practices, the FN Lending Terms of Use (TOU) Maximum Renewal Period policy**

must be configured as outlined below.

- **Standard wrlc users receive a 42-day initial loan period with up to 3 additional 42-day renewals, resulting in a total allowable loan period of 168 days.**
- **Patrons assigned the WRLC Faculty Job Category receive fixed semester loan periods (1/31/YYYY, 5/31/YYYY, and 9/30/YYYY) with a total allowable loan period of 365 days, including renewals.**

The **Maximum Renewal Period** policy defines the total amount of time a patron may retain a loaned item beginning from the original loan date, including all renewals.

Per ExLibris documentation, "*Alma doesn't count the number of renewals for a loan. Renewal limits are managed by the 'Maximum Renewal Period' policy in the Loan Terms of Use (TOU) which indicates the total period of time that a user may have the loaned item.*" ([ExLibris: Loan doesn't renew as expected in Alma](#))

Example: WRLC FN Lending Maximum Renewal Period configurations:

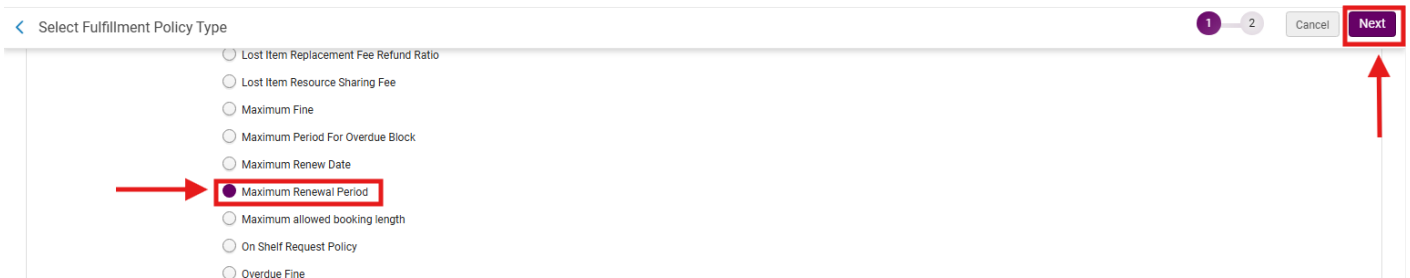
- Students:
  - 42-day initial loan period plus 3 renewals
  - Configure Maximum Renewal Period = 168 Days
- Faculty/Instructors:
  - 1 year total loan period including renewals
  - Configure Maximum Renewal Period = 365 Days

If the desired **Maximum Renewal Period** policy is already available within the **Terms of Use (TOU)**, you may select and update the existing policy as needed; **skip ahead to Step #4**

**1. If the policy is *not* available**, first create a new policy through: Configuration > Fulfillment > Physical Fulfillment > Advanced Policy Configuration > **Add Fulfillment Policy**

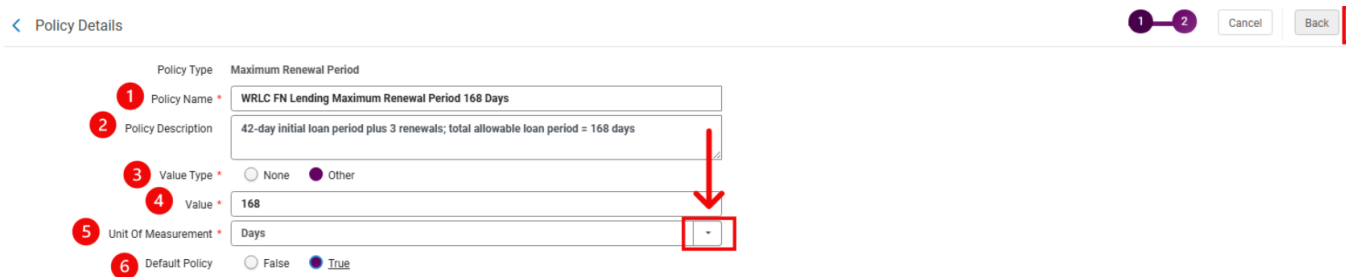
Policy Type	Policy Name	Value	Unit Of Measurement	Is Default	Policy Owner
1	User Renewal Period	1 Year User Renewal	12	Month	Network
2	Grace Period	CLS 39 day grace period	39	Exact Days	Network
3	Grace Period	CLS 3 day grace period	3	Exact Days	Network
4	Grace Period	CLS 29 Day Grace Period	29	Days - Excluded from Fine	Network

**2. From the Select Fulfillment Policy Type list**, locate and select the desired policy > **Maximum Renewal Period**; select **Next**



### 3. In the Policy Details page, complete the policy form to configure the new policy's values:

- Enter a **Policy Name**, for example:
  - WRLC FN Lending Maximum Renewal Period 168 Days
  - WRLC Faculty Lending Maximum Renewal Period 365 Days
- Enter a **Policy Description**, for example:
  - 42-day initial loan period plus 3 renewals; total allowable loan period = 168 days
  - 1 year total allowable loan period including renewals
- From the **Value Type** drop-down menu, select **Other**
  - Selecting **Other** enables the fields required to configure the policy duration and unit of measurement.
- In the **Value** field, enter the desired total loan duration
- From the **Unit of Measurement** drop-down menu, select the appropriate unit: **Days**
- Set **Default Policy** according to local library policy
  - Select **True** if this policy should be the default option for this policy type
  - Select **False** if this policy should only be available for selection when needed
- Select **Save**



### 4. Open the desired Terms of Use (TOU) Navigate to: Configuration> Fulfillment> Physical Fulfillment> Terms of Use and Policies

- Set <Terms of Use Type> to Loan
- Locate the desired TOU; in this example it is WRLC FN Lending, your library may use a different TOU title
- From the action row menu, select Edit

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Terms Of Use Type:

Name	Type	TOU Owner	Description
41 7 Day Not Renewal	Loan	Institution	-
42 7 Day VRC	Loan	Institution	No Community Impact Fee or Overdue Fee on any item from the VRC
43 7 Days Equipment	Loan	Institution	7 Days Equipment
44 7 Days Games	Loan	Institution	-
45 AU Test Loan	Loan	Institution	AU Testing
46 Adjunct Faculty Laptop	Loan	Institution	-
47 Admin Accounts - No Fines	Loan	Institution	-
48 Borrowed from SUNY	Loan	Institution	16 week loan with no renewal
49 Campus Use Everyone Else	Loan	Institution	Created to change Primo Display - coupled with loan rule in Media FU of same name
50 Default terms of use	Loan	Institution	Allow CLS loans
51 End of Term Faculty	Loan	Institution	End of Term Faculty
52 In Library Use Only - Periodicals	Loan	Institution	To be used for shared periodicals and any others that can be requested for "In Library Use Only"
53 Music Compact Disc 7 Days for Students	Loan	Institution	-
54 NCIP Lending	Loan	Institution	-
55 Non-circulating	Loan	Institution	-
56 Semester-use Lockers	Loan	Institution	-
57 User groups not eligible to borrow	Loan	Institution	-
58 WRLC FN lending	Loan	Institution	Terms for lending in the CLS fulfillment network
59 WRLC Faculty lending	Loan	Institution	Terms for lending to Faculty in the CLS fulfillment network

Dropdown menu for Terms Of Use Type: **Loan**

Row 58 context menu: **Edit**, View, Delete, Show related fulfillment rules

## 5. Update the Maximum Renewal Period policy from the <Terms of Use Policies> menu:

- From the Terms of Use Management page, locate Policy Type: Maximum Renewal Period
- Use the TOU's policy's drop-down menu to select the desired policy; here the policy example is <168 days (6 weeks old) but your library may have a different policy name

Terms of Use Management

1 2 Cancel **Next**

Terms of Use Details

Name: **WRLC FN lending**

Description: **Terms for lending in the CLS fulfillment network**



Terms of Use Policies

Policy Type	Policy Name
1 Is Loanable	Loanable (Loanable)
2 Is Recalable	Recall Allowed (Recall is possible)
3 Due Date	6 wk general loan (6 week general loan)
4 Requested Item Due Date	14 day limit if request exists (Limit new loans to 14 days if another request on the same item)
5 Recall Period	14 Days Recall Period (14 Days Recall Period)
6 Renew Fee	No Renewal Fee (Default No Renewal Fee)
7 Lost Item Fine	112 Days Maximum Renewal Period (112 Days Maximum Renewal Period)
8 Lost Item Replacement Fee	14 days
9 Lost Item Replacement Fee Refund Ratio	168 days (6 weeks x4)
10 Maximum Fine	16 week maximum renewal (16 week maximum renewal)
11 Overdue Fine	28 Day Maximum Renewal Period
12 Recalled Overdue Fine	365 Days Maximum Renewal Period (365 Days Maximum Renewal Period)
13 Grace Period	4 Days
14 Is Renewable	63 days (9 weeks)
15 <b>Maximum Renewal Period</b>	6 Days Maximum Renewal Period (6 Days Maximum Renewal Period)
16 Closed Library Due Date Management	84 Days

Row 15 context menu:

**6. On the resulting Terms of Use Confirmation page, locate the Maximum Renewal Period policy from the menu to confirm it has updated to the desired policy; select Save**

< Terms of Use Confirmation 1 2 Cancel Back **Save**

Policy Type	Policy Name	Policy Description
1	Is Loanable	Loanable
2	Is Recallable	Recall Allowed
3	Due Date	6 wk general loan
4	Requested Item Due Date	14 day limit if request exists
5	Recall Period	14 Days Recall Period
6	Renew Fee	No Renewal Fee
7	Lost Item Fine	No Lost Item Fine
8	Lost Item Replacement Fee	CLS \$110 replacement fee
9	Lost Item Replacement Fee Refund Ratio	100 Percent Lost Item Refund
10	Maximum Fine	CLS \$25 maximum fine
11	Overdue Fine	CLS no overdue fine
12	Recalled Overdue Fine	CLS \$5/day recalled item fine
13	Grace Period	No Grace Period
14	Is Renewable	Renewable
15	Maximum Renewal Period	168 days
16	Close Library Due Date Management	Move Due Time to Next Open Time
17	Cancelled Recall Due Date	Restore to original due date

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