

AFN Institution Zone Configurations

The following Automated Fulfillment Network (AFN) configurations are set in each WRLC Institution Zone. Settings will look slightly different depending on whether the Institution Zone is both a lender and borrower in the WRLC AFN, or if they are only a borrower. The below configurations are clearly marked as to whether they apply to all CLS libraries, r to only the borrower + lender libraries (and not to borrower-only libraries).

For a list of all partner profiles in the WRLC AFN, as well as their borrowing and lending preferences, see the [Consortial Partners in CLS/AFN](#) page.

For information on how to edit the CLS Request link in Primo, see the [Display Logic Rules for the AFN/CLS Request Form in Primo](#) page.

Resource Sharing Library

Configuration > Configuring drop-down menu = [*choose your institution's Main Library*] > Fulfillment > Library Management > Library Details

This configuration pertains to

- Borrower + Lender Institutions
- Borrower Only Institutions

Your resource sharing library is the library where your temporary borrowing and lending locations are housed. For the WRLC AFN, your institution's Main Library is the designated Resource Sharing Library.

Resource Sharing Information section

- Is Resource Sharing Library = Yes
- Itemless = No
- Symbol = [ISO symbol]

Borrowing Setup section

- Cancel request on locate failure = Yes
- Automatically activate locate profile = Yes
- Temporarily inactive for borrowing = No
 - This can be switched to Yes for a specific period of time, for example if the Library is closed
- Default location = CLS Borrowing Library
- Default pickup location = [Institution's Library]
- Extend due date when renew requested = No

Resource Sharing Information

Is resource sharing library

Itemless

Symbol

BORROWING SETUP

Cancel request on locate failure

Automatically activate locate profile

Temporarily inactive for borrowing

Default location

Default pickup location

Extend due date when renew requested

Lending Setup section

Please note that the Lending Setup portion of the Resource Sharing section is NOT used by the WRLC AFN. This is because our AFN handles all lending requests as regular hold requests within the owning Institution's IZ; they are NOT considered true lending requests by Alma. For more information, see the Alma Knowledgebase page [Automated Fulfillment Network Requests \(AFN\)](#)

LENDING SETUP

Automatically locate resource

Reject request when locate fails

Reject request when no available items

Reject request when no requestable items

Reject request when only electronic available [Electronic Rejection Rules](#)

Ignore electronic resources

Ignore electronic resources for physical-only requests

Prefer Uresolver locate results

Automatic creation

Temporarily inactive for lending

Inactive dates range

Default location

Similarly, the AFN follows the settings in each Institution's Locate Profile to find a matching item, NOT the settings in the Lending Setup section of the Library Details page. This is because our AFN handles all lending requests as regular hold requests within the owning Institution's IZ; they are NOT considered true lending requests by Alma.

Locate by fields

Locate only if all fields match Yes No



Title

Author

ISBN / ISSN

System Control Number

Edition

ISSN (010)

Other Standard ID

Barcode

DOI

NOT USED BY
AFN

For more information, see the Alma Knowledgebase page [Configuring Parameters of a Resource Sharing Library](#)

Temporary Resource Sharing Locations

Configuration > Configuring drop-down menu = [choose your institution's Main Library] > Fulfillment > Locations > Physical Locations

This configuration pertains to

Borrower + Lender Institutions

Borrower Only Institutions

- CLSBORR (CLS Borrowing Library location)

- Item records for AFN items borrowed from other libraries will be given the temporary borrowing location CLSBORR.
- IZs that only borrow in the WRLC AFN will only have the CLSBORR location configured in their IZ. For a list of all partner profiles in the WRLC AFN, as well as their borrowing and lending preferences, see the [Consortial Partners in CLS/AFN](#) page.

- CLSLEND (CLS Lending Library location)

- Although there is a location named *CLSLEND*, it is NOT used in the AFN workflow. Items lent out via AFN will have a status of *Loan*, but will not be given a temporary location. Meanwhile, items lent out in either Peer 2 Peer or Rapido requests are given the *CLSLEND* temporary location.

Physical Locations List

1 - 2 of 2 + Add Location

Location Type: All Attached Fulfillment Unit: DCVN_FU

Code	Name	Type	Fulfillment Unit	
1 CLSLEND	CLS Lending Library	Closed	DCVN_FU	<input type="button" value="..."/>
2 CLSBORR	CLS Borrowing Library	Closed	DCVN_FU	<input type="button" value="..."/>

For more information, see the Alma Knowledgebase page [Configuring Physical Locations](#)

Temp Item Creation Rule

Configuration > Configuring drop-down menu = [choose your institution's Main Library] > Fulfillment > Library Management > Temporary Item Creation Rules

This configuration pertains to

Borrower + Lender Institutions

These are rules that dictate what location and item policy are given to temporary item records created by AFN requests.

- Rule Name = Temporary item rule
- Location = CLSBORR
- Item Policy = 4 week loan

< Temporary Item Creation Rule Cancel Save

Temporary Item Creation

Name *

Description

Created By WRLC Admin Created On 05/03/2018

Updated By WRLC Admin Updated On 05/03/2018

Input Parameters

[+ Add Parameter](#)

No records were found.

Output Parameters

Location

Item Policy

Please note that the length of loans are dictated by TOUs and fulfillment units, NOT the item policy assigned to CLS items

For more information, see the Alma Knowledgebase page [Configuring Temporary Item Creation Rules](#)

Fulfillment Units

Configuration > Fulfillment > Physical Fulfillment > Fulfillment Units > Edit Fulfillment Unit > Fulfillment Unit Details tab

This configuration pertains to

- Borrower + Lender Institutions

Borrower Only Institutions

Fulfillment Units are one or more physical locations in an institution that follow the same fulfillment policies. Similarly, the Network Zone has a [fulfillment unit for WRLC's AFN](#), that dictates the rules by which items circulate in the fulfillment network.

For information on how to apply the NZ Fulfillment rules for AFN requests to IZ-only Fulfillment Units, please see the [Network Fulfillment Units \(Consortial Environments\) section](#) of the [Fulfillment units and Fulfillment Rules page](#) of the WRLC Alma Wiki.

For more information, see the Alma Knowledgebase page [Configuring Fulfillment Units](#)

Request Pickup Configuration

Configuration > Fulfillment > Physical Fulfillment > Request Pickup Configuration

This configuration pertains to

Borrower + Lender Institutions

The following 2-3 request pickup rules are configured for each Institution Zone that *lends* their library's items in the CLS/AFN. These rules control how and when both AFN and SCF requests expire.

The first request rule should always be *WRLC SCF Requests*, followed by *WRLC AFN/CLS Requests*. The third request rule, *General Request Pickup Rule*, is configured if there are no other request pickup rules used by the Institution Zone.

When the item's expiration time arrives, the *Requests - Handle Expiration Step job* cancels the requests. For more information, please see the [Fulfillment Jobs Configuration](#) section of the [AFN Institution Zone Configurations](#) page on the WRLC Alma Wiki.

Request Pickup Configuration

Calculate existing requests retroactively

+ Add Rule



Filter: All

	Enabled	Move Up	Move Down	Rule Name	Description	Updated By	Update Date	
1	<input checked="" type="checkbox"/>		▼	WRLC SCF Requests	IMPORTANT: Do not edit this configuration without communicating with WRLC HQ staff. Requests for items in an SCF location are given a 95 day expiry date to match the default given by the SCF remote storage app.	WRLC Admin	10/23/2025	...
2	<input checked="" type="checkbox"/>	▲	▼	WRLC AFN/CLS Requests	IMPORTANT: Do not edit this configuration without communicating with WRLC HQ staff. Requests made by a user in a 'wrlc user' group are given a 5 day expiry date.	WRLC Admin	10/17/2025	...
3	<input checked="" type="checkbox"/>	▲	▼	General Request Pickup Rule	IMPORTANT: Do not edit this configuration without communicating with WRLC HQ staff. All requests not affected by the 'WRLC SCF Requests' and the 'WRLC AFN/CLS Requests' pickup rules are given 99 day expiry time to avoid the Alma out-of-the-box configs.	WRLC Admin	10/17/2025	...
4	<input type="checkbox"/>	▲	▼	Move permanently	-	WRLC Admin	10/17/2025	...
5	<input type="checkbox"/>	▲	▼	Move temporarily	-	WRLC Admin	10/17/2025	...
6	<input type="checkbox"/>	▲	▼	Patron digitization request	-	WRLC Admin	10/17/2025	...
7	<input type="checkbox"/>	▲	▼	Patron physical item request	-	WRLC Admin	10/17/2025	...

WRLC SCF Requests pickup rule

When a request is made for an item in the Shared Collections Facility, two copies of that request are created in WRLC's network; the original request in the owning Institution's IZ, and a second copy of the request in the SCF IZ. This rule ensures that both copies have the same expiration date.

Request Pickup Configuration

Name	WRLC SCF Requests		
Description	<p>IMPORTANT: Do not edit this configuration without communicating with WRLC HQ staff.</p> <p>Requests for items in an SCF location are given a 95 day expiry date to match the default given by the SCF remote storage app.</p>		
Created By	WRLC Admin	Created On	10/17/2025
Updated By	WRLC Admin	Updated On	10/23/2025

Input Parameters

Name	Operator	Value
1 Location	In List	Main Library - WRLC Shared Collections Facility, Main Library - WRLC Shared Collections Facility (non-circulating)

Output Parameters

Consider as missing when expired	Never	Show in 'Pick From Shelf' list	False
Expiry time for 'Pick From Shelf' (in days)	95	Calculate expiry time in open days	N o

- Input Parameters
 - Name - Location
 - Operator - In List
 - Value - ALL Remote Storage locations configured in the IZ
- Output Parameters
 - Consider as missing when expired - Never
 - Expiry time for 'Pick From Shelf' (in days) - 95*
 - Show in 'Pick From Shelf' list - False
 - Calculate expiry time in open days - No

*This number is to match the expiry time automatically given by the SCF Remote Storage app when requests are copied from the owning Institution Zone to the Shared Collections Facility Institution Zone. For more information about the Remote Storage Applications, please see the [Remote Storage App chapter](#) in the WRLC Alma Wiki.

WRLC AFN/CLS Requests pickup rule

This rule ensures that each CLS/AFN request is given 5 days to be filled before the request is marked as expired by Alma.

Request Pickup Configuration
Back

Name WRLC AFN/CLS Requests

Description **IMPORTANT: Do not edit this configuration without communicating with WRLC HQ staff. Requests made by a user in a 'wrlc user' group are given a 5 day expiry date.**

Created By WRLC Admin **Created On** 10/17/2025

Updated By WRLC Admin **Updated On** 10/17/2025

Input Parameters

Name	Operator	Value
1.. User Group	=	wrlc user

Output Parameters

Consider as missing when expired	Never	Show in 'Pick From Shelf' list	True
Expiry time for 'Pick From Shelf' (in days)	5	Calculate expiry time in open days	Yes

- Input Parameters
 - Name - User Group
 - Operator - '='
 - Value - wrlc user
- Output Parameters
 - Consider as missing when expired - Never
 - Expiry time for 'Pick From Shelf' (in days) - 5
 - Show in 'Pick From Shelf' list - True
 - Calculate expiry time in open days - Yes

General Request Pickup Rule

This third request rule is *only* configured IF there are no other request pickup rules active in the Institution Zone. This rule is primarily used to prevent Alma's out-of-the-box configurations (7 day expiry, mark as missing when expired) being applied to all requests.

Request Pickup Configuration

Cancel

Save

Request Pickup Configuration

Name * **General Request Pickup Rule**

Description **IMPORTANT: Do not edit this configuration without communicating with WRLC HC**

Created By **WRLC Admin**

Created On **10/17/2025**

Updated By **WRLC Admin**

Updated On **10/17/2025**

Input Parameters

+ Add Parameter



Name	Operator	Value
1. Request Type	In List	Booking, Library physical digitization, Move permanently, Move temporarily, Patron digitization request, Patron physical item request, Resource sharing digital shipment, Resource sharing physical shipment, Restore item, Staff digitization request, Work order request

Output Parameters

Consider as missing when expired **Never**

Show in 'Pick From Shelf' list **True**

Expiry time for 'Pick From Shelf' (in days) **99**

Calculate expiry time in open days

- Input Parameters
 - Name - Request Type
 - Operator - In List
 - Value - Boking, Library physical digitization, Move permanently, Move temporarily, Patron digitization request, Patron physical item request, Resource sharing digital shipment, Resource sharing physical shipment, Restore item, Staff digitization request, Work order request
- Output Parameters
 - Consider as missing when expired - Never
 - Expiry time for 'Pick From Shelf' (in days) - 99
 - Show in 'Pick From Shelf' list - True
 - Calculate expiry time in open days - Yes

Rota Assignment Rules

Configuration > Fulfillment > Resource Sharing > Rota Assignment Rules

This configuration pertains to

- Borrower + Lender Institutions
- Borrower Only Institutions

Rota Assignment Rules assign Rota Templates to specific requests, based on specified criteria.

There are two WRLC Rota Assignment Rules configured in each Institution Zone in our consortium. These rules use the [Rota Templates configured in the WRLC Network Zone](#).

These rules can be in any order, though both should always be above Lender of Last Resort rules configured in your IZ.

1. [WRLC CLS Book Borrowing](#)
2. [WRLC CLS Digitization](#) * (please note that, although this Rota Assignment Rule is active, the NZ Rota Template it uses is currently *inactive*)

The priority of Institution rules versus Network rules is determined by the `network_rota_assignment_rules_precedence` setting found in Configuration > Fulfillment > General > Other Settings. The default setting for WRLC is `FALSE` (IZ rules take precedent over NZ rules). For a full list of all recommended *Other Settings* configurations for a WRLC Institution Zone, please see the [Institution Zone Configuration page](#) on the WRLC Alma Wiki.

Rules		Notes							
Institution Rules List									
Filter: All									
Enabled	Move Up	Move Down	Rule Name	Description	Managed in Network	Updated By	Update Date		
<input checked="" type="checkbox"/>		▼	WRLC CLS Book Borrowing	IMPORTANT: Do not edit this configuration without communicating with WRLC HQ staff. Rule assigns the NZ-managed rota template 'CLS-Physical' to all requests where Requested Format = Physical		Saavedra@Network	12/11/2025	⋮	
<input checked="" type="checkbox"/>	▲	▼	WRLC CLS Digitization	IMPORTANT: Do not edit this configuration without communicating with WRLC HQ staff. Rule assigns the NZ-managed rota template 'CLS-Digital' to all requests where Requested Format = Digital		Saavedra@Network	12/11/2025	⋮	
<input checked="" type="checkbox"/>	▲		ILLiad as Lender of Last Resort	-		CU2635218	01/25/2024	⋮	

WRLC CLS Book Borrowing

- Input Parameters
 - Name - Requested Format
 - Operator - =
 - Value - Physical
- Output Parameters
 - Rota Templates - CLS-Physical

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Rota Assignment Rules ▼

Name	WRLC CLS Book Borrowing		
Description	IMPORTANT: Do not edit this configuration without communicating with WRLC HQ staff. Rule assigns the NZ-managed rota template 'CLS-Physical' to all requests where Requested Format = Physical		
Created By	Admin, WRLC	Created On	06/11/2018
Updated By	Saavedra@Network	Updated On	12/11/2025

Input Parameters ▼

Name	Operator	Value
1 Requested Format	=	Physical

Output Parameters ▼

Rota Templates	CLS-Physical
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WRLC CLS Digitization

- Input Parameters
 - Name - Requested Format
 - Operator - In List
 - Value - Digital
- Output Parameters
 - Rota Templates - CLS-Digital * (this NZ-managed Rota Template is currently inactive)

Rota Assignment Rules

Name: WRLC CLS Digitization

Description: IMPORTANT: Do not edit this configuration without communicating with WRLC HQ staff. Rule assigns the NZ-managed rota template 'CLS-Digital' to all requests where Requested Format = Digital

Created By: Admin, WRLC Created On: 08/26/2019

Updated By: Saavedra@Network Updated On: 12/11/2025

Input Parameters

Name	Operator	Value
1 Requested Format	In List	Digital

Output Parameters

Rota Templates: CLS-Digital

For more information, see the Alma Knowledgebase page [Configuring Rota Assignment Rules](#)

Fulfillment Jobs Configuration

Configuration > Fulfillment > General > Fulfillment Jobs Configuration



This configuration pertains to

Borrower + Lender Institutions

Below are the Fulfillment jobs that **must** be active for libraries that lend their library's items in the CLS/AFN.

Requests - Handle Expiration Job

This job should be active only for libraries that *lend* their library's items in the CLS/AFN.

The job cancels requests when the expiration date for a request has passed AND the status of the request is one of the following :

- Pick from shelf
- Communicated to Remote Storage

Expiration dates are configured according to an Institution's Request Pickup Rules. For more information on how these should be configured for the AFN, please see the [Request Pickup Configuration](#) section of the [AFN Institution Zone Configurations](#) page on the WRLC Alma Wiki.

Loans - Overdue and Lost Item

This job should be active for libraries that *lend* their library's items in the CLS/AFN.

The job both notifies patrons about overdue loans, and changes a loan's status to Lost; the parameters for each of these actions is dictated by the configuration of your Institution Zones Overdue and Lost Loan profiles. For more information about these in relation to CLS, please see the Overdue and Lost Loan Profiles section of the WRLC Alma Wiki.

For more information, see the Alma Knowledgebase page [Configuring Fulfillment Jobs](#).

Overdue and Lost Loan Profiles

Configuration > Fulfillment > General > Overdue and Lost Loan Profiles



This configuration pertains to

Borrower + Lender Institutions

The overdue and lost loan profiles monitor long overdue loans and turn them into lost loans when applicable. The profiles send reminders to the patron as well as create fees and user blocks. Lost fees charged to a patron account are determined by the items Terms of Use.

For libraries that *lend* their library's items in the CLS/AFN both lend and borrow, there should be at least one **Change to Lost** profile that includes the User Group '*wrlc user*'. This profile ensures that any WRLC patrons with overdue items from your institution will be sent an email notifying them that their item is overdue by 40 days and has now been changed to a Lost status. This change in status marks the item as Lost, and adds a \$110 replacement fee to their account (as configured in the AFN's Terms of Use).

Below is an example configuration, along with recommended configurations :

The screenshot shows a configuration form titled "Overdue and Lost Loan Profile Record". At the top right, there are "Cancel" and "Save" buttons. The form contains the following fields and settings:

- Name: Default Lost Rule
- Description: (empty)
- Active:
- Profile Type: Change to lost
- Days After Due Date: 39
- Days After Status Date: 0
- Loan Status: (empty)
- Library: (empty)
- Item policy: (empty)
- Letter send format: Mail
- Days: Days, Open Days
- User Group: wrlc user
- Locations: (empty)
- Material Type: (empty)

Active : Checked

Profile Type : Change to Lost

Days after due date : 39

Notices will be send the following day (on the 40th day)

Days : Checked (do not check 'Open Days')

User Group : *wrlc user*

Please note that if any of the settings above are left blank, the field will apply to all in the category. For example, if the User Group field is left blank, this profile will be applied to all user groups in your Institution Zone.

Alma runs a daily job (**Loans - Overdue and Lost Item**) to process overdue and lost loans, which, according to the list of profiles, determines the loans for which warnings are sent and those that are defined as lost.

The type of letter sent depends on the setting of the **switch_to_overdue_and_lost_loan_new_job** customer parameter. When this parameter is set to true, the notification sent is the *Ful Overdue and Lost Loan Notification Letter*. In this case, a single notification is sent to each patron for all overdue items whose criteria match a particular profile, listing all of the overdue items in that profile.

For more information, see the Alma Knowledgebase page [Configuring Overdue and Lost Loan Profiles](#) page.

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