

# Network Zone Configuration of the CLS/AFN

Staging: Network Zone configuration

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# NZ Configuration

Configuration steps taken in the Network Zone.

For reference, see "Configuring Fulfillment Information in the Network Zone"

([https://knowledge.exlibrisgroup.com/Alma/Product\\_Documentation/010Alma\\_Online\\_Help\\_\(English\)/100Managing\\_Multiple\\_Institutions\\_Using\\_a\\_Network\\_Zone/05\\_Fulfillment\\_in\\_Consortia/010Configuring\\_Fulfillment\\_Information\\_in\\_the\\_Network\\_Zone](https://knowledge.exlibrisgroup.com/Alma/Product_Documentation/010Alma_Online_Help_(English)/100Managing_Multiple_Institutions_Using_a_Network_Zone/05_Fulfillment_in_Consortia/010Configuring_Fulfillment_Information_in_the_Network_Zone))

# 1. Configure Borrowing and Lending workflows

Configuration ? Fulfillment ? Resource Sharing ? Workflow Profiles

ExLibris Configuring: Washington Research Library Consortium (WRLC) Network

### Workflow Profiles

[+ Add Workflow Profile](#)

Workflow Profile	Type	Steps
1 CLS Borrowing RS	Borrowing	Automatic renew,Cancelled By Patron,Cancelled by partner,Cancelled by staff,Manual renew,Recalled by partner,Reject,Request accepted,Waiting for receive digitally
2 CLS Lending RS	Lending	Cancel reply,Lender check in,Patron renewal,Renewal response,Staff renewal

Note: Later as part of the configuration for Resource Sharing with SUNY 2 additional profiles were added. TBD - SUNY, Other configurations.

ExLibris Configuring: Washington Research Library Consortium (WRLC) Network

### Workflow Profiles

[+ Add Workflow Profile](#)

Workflow Profile	Type	Steps
1 CLS Borrowing RS	Borrowing	Automatic renew,Cancelled By Patron,Cancelled by partner,Cancelled by staff,Manual renew,Recalled by partner,Reject,Request accepted,Waiting for receive digitally
2 CLS Lending RS	Lending	Cancel reply,Lender check in,Patron renewal,Renewal response,Staff renewal
3 SUNY Borrowing RS	Borrowing	Automatic renew,Cancelled By Patron,Cancelled by partner,Cancelled by staff,Conditional,Damaged communicated,Declared lost by partner,Lender check in,Lost communicated,Manual renew,Reject,Renew requested,Request accepted,Will supply
4 SUNY Lending RS	Lending	Borrower recall,Cancel reply,Conditional,Lender check in,Patron renewal,Staff renewal

# 2. Create locate profiles

Configuration ? Fulfillment ? Resource Sharing ? Locate Profiles

Type is "Fulfillment Network"

The screenshot shows a web application interface for creating a locate profile. The main heading is "Locate Profile Details". Below the heading, there is a breadcrumb trail: "Configuration ? Fulfillment ? Resource Sharing ? Locate Profiles". The form contains the following fields:

- Name \***: A text input field containing "AU".
- Description \***: A text input field containing "American University Library".
- Type**: A dropdown menu with "Fulfillment Network" selected.

There are two tabs: "Locate Profile Details" (active) and "Locate Profile Parameters". At the top right, there are "Cancel" and "Save" buttons. A blue sidebar is visible on the left side of the screen.



## < Locate Profile Details

AU

Locate Profile Details    Locate Profile Parameters

Server \*       Port

Username       Password

Institution \*

- Alma Network
  - Check item availability
  - Check item requestability
  - Allow locate by metadata
  - Locate by fields
- Locate only if all fields match     Yes     No



<input type="checkbox"/> Author	<input type="checkbox"/> Barcode
<input type="checkbox"/> DOI	<input type="checkbox"/> Edition
<input checked="" type="checkbox"/> ISBN / ISSN	<input checked="" type="checkbox"/> LCCN (010)
<input checked="" type="checkbox"/> System Control	<input type="checkbox"/> Other Standard ID
Number	
<input checked="" type="checkbox"/> Title	

Test Connection

NZ Configuration

# 3. Create Partners

Alma → Fulfillment → Resource Sharing → Partners

# Letters managed in the NZ for Physical Item Requests

There are two letters managed in the network zone for our partners.

Letters managed in the NZ for Physical Item Requests

# Pull Slip (Full Resource Request Slip Letter)

The Pull Slip is managed for our partners to provide consistency for the displayed location codes. These codes are used to direct the physical items to the patron's selected pickup location.

Note: The SCF's Pull Slip has further modifications to allow the letter to be used for ILLiad physical item requests that come to the SCF via the ILLiad Addon. Currently, only GW is using the ILLiad Addon for this purpose. It is not managed in the Network Zone.

Letters managed in the NZ for Physical Item Requests

# On Hold Shelf Letter

The On Hold Shelf Letter is managed in the Network Zone so that specific library instructions can be provided to the patron on when and how material can be picked up. This is due to the use of the "Owning Library's" On Hold Shelf Letter in the Automated Fulfillment Network(CLS).

In the case of a patron requesting an item from their own library for pickup, the "Owning Library's" On Hold Shelf Letter is used.

In the case of a P2P or a Rapido request the requesting patron's Library's On Hold Shelf Letter is used.