

Sandbox Configuration after refresh

The Premium Sandboxes are refreshed twice a year. This copies the latest configurations from production Alma into the PSB Network Zone and the 3 PSB IZs. Several configuration changes need to be made so that the AFN will work correctly.

- [Update Rota Template Members](#)
- [Update the Resource Sharing Partners for the PSB](#)
- [Update sftp server directory for PSB use](#)
- [Update Webhook profiles](#)

Update Rota Template Members

After the refresh, the Rota Template has the full compliment of partners for Consortium Book Borrowing (CLS-Physical) template. Members that do not have an IZ Sandbox need to be removed for the Rota to work properly. Currently, the members should be AU, DC, and GW. Remove the others that do not have a PSB.

In the PSB Network Zone:

Fulfillment --> Resource Sharing --> Rota Templates --> Edit Consortium Book Borrowing (CLS-Physical)

- On the Member Tab, select and Remove the IZs that are not represented in the Sandbox.

The screenshot shows the 'Template Members' interface for the 'CLS-Physical' template. At the top right, there are 'Cancel' and 'Save' buttons, with 'Save' highlighted in green. Below the template name, there are tabs for 'General Information', 'Template Members', and 'Notes'. The 'Template Members' tab is active, displaying a table with the following data:

	Name	Code	Profile Type	Status	
1	American University	AU	Fulfillment Network	Active	...
2	University of DC	DC	Fulfillment Network	Active	...
3	George Washington University	GW	Fulfillment Network	Active	More actions
4	Shared Collection Facility	SCF	Fulfillment Network	Active	...

The row for 'Shared Collection Facility' (SCF) is highlighted in blue, and a 'Remove' button is visible below it, also highlighted in green. At the top right of the table area, there are buttons for '+ Add Partners', a share icon, and a settings icon.

- Don't forget to Save.

Update the Resource Sharing Partners for the PSB

The Resource Sharing partners that are template members will need to have their URL parameter updated.

Fulfillment --> Resource Sharing --> Partners

- Find the partners that are in the updated Rota Template. Select edit.

Resource Sharing Partner List

Institution **Community**

1 - 1 of 1 All **American University**

+ Add Partner

Status: All Profile Type: All

Name	Code	Status	Profile Type	More actions
1 American University	AU	Active	Fulfillment Network	<input type="text"/> Edit <input type="text"/> Remove

- Select the Parameters tab. Update the URL field. Don't forget to Save.

< Resource Sharing Partner Cancel Save

American University

General Information **Contact Information** Parameters Notes

Customer code * 01WRLC_AMU

Request Expiry No expiry Expire by interest date Expiry time

URL https://wrlc-amu-psb.alma.exlibrisgroup.com/

Currently, the URLs are:

- <https://wrlc-amu-psb.alma.exlibrisgroup.com/> (AU)
- <https://wrlc-doc-psb.alma.exlibrisgroup.com/> (DC)
- <https://wrlc-gwu-psb.alma.exlibrisgroup.com/> (GW)
- <https://wrlc-scf-psb.alma.exlibrisgroup.com/> (SCF)

Once both the Rota Template members and the Resource Sharing Partner URL are updated you need to run the "Distribute Resource Sharing Network Configuration" job from the PSB Network Zone. This job distributes the changes that you just made to the template partner IZs

Fulfillment --> Advanced Tools - General --> Distribute Resource Sharing Network Configuration

The screenshot shows the ExLibris interface. At the top left is the ExLibris logo. To its right is a search bar with a magnifying glass icon and two dropdown menus labeled 'All titles' and 'Title'. Below the search bar is a vertical navigation menu on the left with several icons. The main content area displays a list of menu items organized into sections. The 'Distribute Resource Sharing Network Configuration' item is highlighted with a green circle.

Resource Requests
Deliver Digital Documents
Approval Requests List
Monitor Requests & Item Processes

Course Reserves
Courses
Reading Lists
Citations

Resource Sharing
Partners
Rota Templates

Advanced Tools - Loans
Fulfillment Configuration Utility
Bulk Change Due Dates
View Overdue and Lost Loan Jobs

Advanced Tools - Requests
View Restore Request Jobs
★ Items Requiring Action
Transfer Requests

Advanced Tools - Reading Lists
Citation Alternate Suggestions
Bulk Citation Copyright Recalculate
Process and Enrich Citations

Advanced Tools - General
Create Fines And Fees Report
Create Fulfillment Sets
Resend Printouts/Emails
Loans Overdue Notification Status Update
Distribute Fulfillment Network Configuration
Distribute Resource Sharing Network Configuration

Update sftp server directory for PSB use

The Premium Sandbox uses the `sftp.wrlc.org` server to post files from the running of the "Send Request to Remote Storage" jobs. It is also used for posting files from the running of the publishing jobs.

Follow the instructions below for all of the Institution Zones in the sandbox:

Configuration --> General --> External Systems --> Allowed S/FTP connections

Add the IP **`sftp.wrlc.org`** to the list of allowed connections in the sandbox

Ftp Include List Save

Table Name: Ftp Include List i >

Values Notes

1 - 2 of 2 Q

Import + Add Row 📄 ⚙️

Enabled: All

	Enabled	FTP Hostname / IP	FTP Hostname / IP description	Updated By	Last Updated	
1	<input checked="" type="checkbox"/>	<code>ftp.exlibris-usa.com</code>	Ex Libris ftp server	WRLCadmin	09/03/2024	...
2	<input checked="" type="checkbox"/>	<code>sftp.wrlc.org</code>	S/FTP connection for sc	WRLCadmin	09/03/2024	...

Configuration --> General --> External Systems --> S/FTP definitions

Configuring: American University

List of S/FTP connections

Ex Libris Secure FTP Service

Server: `custdata-dc04.hosted.exlibrisgroup.com:10022` User: `alma_01wrlc_amu@customers.na` Sub-directory: `sandbox`

Regenerate private key [optional parameters](#)

1 - 9 of 9

Name	Description	Authentication method	Managed in Network
1 EBSCO EDI Ftp Server	FTP Service to retrieve EDI files	Username/password	
2 IDS_FTP	-	Username/password	
3 My FTP Connection	-	Username/password	
4 OCLC Shared e-resources ftp site	OCLC ftpsite to retrieve shared e-resources	Username/password	
5 SCF SFTP site	NZ-managed SFTP site for Shared Collection Facility data transfer	Username/password	✓
6 SFTP for SCF App	NZ-managed SFTP site for the Alma Remote Storage App	Username/password	✓
7 WRLC DB SFTP site	NZ-managed SFTP site for Alma Analytics reports	Username/password	✓
8 WRLC SFTP site	Secure FTP site at wrlc.org	RSA	
9 YBP Oxford Online ftp server	Oxford Online ftp server	Username/password	

Find the "SFTP for SCF App" connection.

Configuring: American University

List of S/FTP connections

Ex Libris Secure FTP Service

Server: `custdata-dc04.hosted.exlibrisgroup.com:10022` User: `alma_01wrlc_amu@customers.na` Sub-directory: `sandbox`

Regenerate private key [optional parameters](#)

1 - 9 of 9

Name	Description	Authentication method	Managed in Network
1 EBSCO EDI Ftp Server	FTP Service to retrieve EDI files	Username/password	
2 IDS_FTP	-	Username/password	
3 My FTP Connection	-	Username/password	
4 OCLC Shared e-resources ftp site	OCLC ftpsite to retrieve shared e-resources	Username/password	
5 SCF SFTP site	NZ-managed SFTP site for Shared Collection Facility data transfer	Username/password	✓
6 SFTP for SCF App	NZ-managed SFTP site for the Alma Remote Storage App	Username/password	✓
7 WRLC DB SFTP site	NZ-managed SFTP site for Alma Analytics reports	Username/password	✓
8 WRLC SFTP site	Secure FTP site at wrlc.org	RSA	
9 YBP Oxford Online ftp server	Oxford Online ftp server	Username/password	

More actions

- View
- Edit
- Duplicate

Select edit.

Configuring: American University

Alma Sandbox

Update S/FTP connection Test FTP Cancel Save

SFTP for SCF App

Definition Type: FTP ID: 6963527640004102

Context Type: Integration Managed in: Yes Network

Name: SFTP for SCF App

Description: NZ-managed SFTP site for the Alma Remote Storage App

Server: sftp.wrlc.org Port: 22

Sub-directory: Alma

Is full path:

Max. Number of Files: 10 Min. Number of Files: 1

Max. file size: 50 Size type: MB

Allow Navigation: True Ftp Server Type: Default

FTP Passive Mode:

Ftp Server Secured:

Authentication method: Username/password authentication Key authentication

UserName: scfapp Password:

Encrypt files created by Alma:

Locate the Sub-directory used on the sftp.wrlc.org server.

Configuring: American University

Alma Sandbox

Update S/FTP connection Test FTP Cancel Save

SFTP for SCF App

Definition Type: FTP ID: 6963527640004102

Context Type: Integration Managed in: Yes Network

Name: SFTP for SCF App

Description: NZ-managed SFTP site for the Alma Remote Storage App

Server: sftp.wrlc.org Port: 22

Sub-directory: AlmaRSA-PSB

Is full path:

Max. Number of Files: 10 Min. Number of Files: 1

Max. file size: 50 Size type: MB

Allow Navigation: True Ftp Server Type: Default

FTP Passive Mode:

Ftp Server Secured:

Change the Sub-directory to "AlmaRSA-PSB". Save.

This is the directory the Sandbox should be using. You can test if the PSB can connect using the TestFTP button on the upper right of the screen.

For more info on these configurations, see Salesforce case #07222190

Update Webhook profiles

In the non-SCF Institution Zones, the **SCF Job Finish Webhook profile** needs to be update with the Webhook listener URL and activated so that both publishing and requesting functions of the SCFapp work.

In the SCF sandbox, the **SCF Loans Webhooks profile** needs to be updated and activated with the same URL.

Configuration --> General --> External Systems --> Integration Profiles --> Webhook profile

The screenshot shows the 'Integration Profile List' interface for George Mason University Libraries. The table lists three integration profiles. The second profile, 'SCF Job Finish Webhook', is highlighted. A 'More actions' menu is open for this profile, showing 'Edit', 'View Log', and 'Delete' options. A green arrow points to the 'Edit' option.

Name	Code	Description	Integration Type	Managed in Network	Updated By	Status Date
Z39.50 Search	Z3950	Needed for CLS Resource Sharing	Z39.50 Server		WRLCadmin	04/25/2018
SCF Job Finish Webhook	WH_SCF	For integration with the new Alma Remote Storage App	Webhooks		WRLCadmin	09/10/2024
Local Patron Load - HR	HR Load (Faculty / Staff)	Faculty, Staff and Wages patron info from HR. Run this on Mondays and Thursdays. HR data only changes on Monday but Student data updates both Monday and Thursday. This is run on Thursdays to pick up those	Users		G00008677	0

Select Edit.

Configuring: George Mason University Libraries

Integration Profile

SCF Job Finish Webhook

General Information | Actions | Contact Info

WEBHOOK CONFIGURATION

Status: Pending activation Activate

Webhook listener URL * ←

Custom header

Secret *

Message type * JSON XML

SUBSCRIPTIONS

Job Finish

Notifications Configure notification types

Users

Requests

Loans

Pressing this button will send a challenge request to the configured URL and validate the response. The profile must still be saved to retain this activation. For more information, please see the Webhooks documentation.

Add the Webhook listener URL :

Production IZs: <https://almarsa.wrlc.org/>

PSB: <https://almarsa-psb.wrlc.org/webhook>

Activate and Save.

You will see confirmation of activation if the URL is correct and the server responds.

For more info on these configurations, see Salesforce case #07222190