

SCF IZ Maintenance

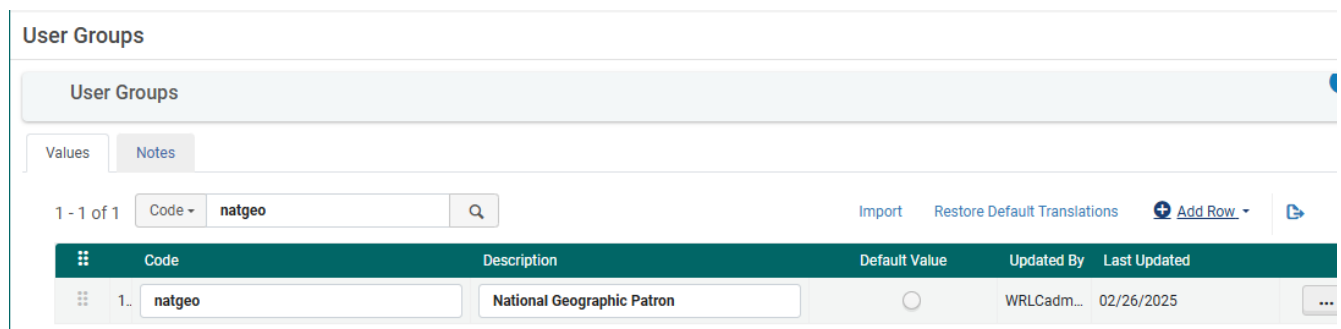
Information on the configuration and maintenance of the Shared Collections Facility Institution Zone, specifically in relation to user groups, ongoing scheduled jobs, etc.

- [Affiliate Library Configuration in the SCF](#)
- [User Accounts in the SCF IZ](#)
- [Scheduled Jobs in the SCF IZ](#)

Affiliate Library Configuration in the SCF

1. Create user group

- Configuration > User Management > User Details > User Groups
- + Add Row
- Choose a code and a description (preferably [*Affiliate Library*] Patron)
- Choose **Add Row**, and then **Save** the table



User Groups

User Groups

Values Notes

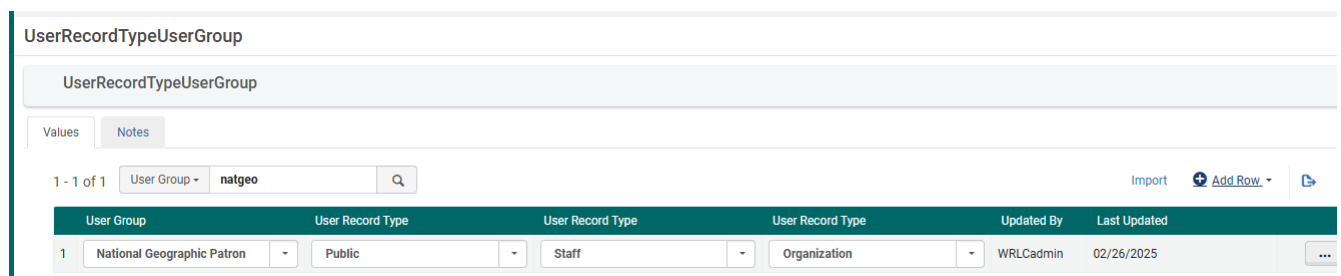
1 - 1 of 1 Code natgeo

Import Restore Default Translations Add Row

Code	Description	Default Value	Updated By	Last Updated
1. natgeo	National Geographic Patron	<input type="radio"/>	WRLCadm...	02/26/2025

2. Apply user record group to a specific type

- Configuration > User Management > User Details > User Record Type/User Group
- + Add Row
- Choose the user group created in step #1, then choose a record type of **Staff**, **Public**, and **Organization**
- Choose **Add Row**, and then **Save** the table



UserRecordTypeUserGroup

UserRecordTypeUserGroup

Values Notes

1 - 1 of 1 User Group natgeo

Import Add Row

User Group	User Record Type	User Record Type	User Record Type	Updated By	Last Updated
1 National Geographic Patron	Public	Staff	Organization	WRLCadmin	02/26/2025

3. Associate library location with Fulfillment Unit

- Configuration > Fulfillment > Physical Fulfillment > Fulfillment Units
- **Edit** the Fulfillment Unit **Affiliate Library**
- Choose the **Fulfillment Unit Locations** tab

- Attach to the list the location(s) associated with the affiliate library
- **Save** the Fulfillment Unit

The Request TOU ('Library Delivery Request') used is what sets the terms for Home Delivery; because of this TOU, all requests made for these items are automatically home delivery requests.

4. Prevent affiliate user group from requesting other SCF materials

Depending on the rules in place for the affiliate library patrons, they may not be allowed to request WRLC items at the SCF; in that case, you will need to include the affiliate library patron user group to the appropriate Fulfillment Unit rules.

The specific rules that need to be edited can be found listed below :

1. **Fulfillment Unit** : Library Delivery Only
 1. **Rule Type** : Request
 2. **Rule Name** : Affiliate Library Patrons No Requesting
 3. Add affiliate library patron user group to the rule
2. **Fulfillment Unit** : Regular
 1. **Rule Type** : Request
 2. **Rule Name** : Affiliate Library Patrons No Requesting
 3. Add affiliate library patron user group to the rule

5. Create Provenance Code for affiliate library items

- Configuration > Resources > General > Provenance Code
- + Add Row
- Choose a code and a description
- Save the Provenance Code table

6. Create a restricted search group for Primo VE

This restricted search group will not allow non-affiliate library users (ex. Trinity users) to view the affiliate library's items in the SCF's instance of Primo.

- Configuration > Discovery > Search Configuration > Restricted Search Groups
- + Add Restricted Search Group

- Choose a code, a name (preferably [Affiliate Library Name] Affiliate Library), and a description

Details

Code * NATGEO

Name * National Geographic affiliate library

Description Only people at the National Geographic Library AND/OR logged in patron

- Add the **Restricted Search Condition** of:
 - Search Index = Location
 - Operator = Equals
 - Value = all library locations associated with affiliate library

Restricted Search Conditions

Clear Conditions + Add a Condition

Logic	Search Index	Operator	Value
1 -	Location	Equals	WRLC National Geographic

- Add the following **Allowed Users**:
 - Patron Group Rule
 - Name = [Affiliate Library] Patron Group
 - Input Parameter
 - Name = User Group
 - Operator = "="
 - Value = all user groups created in step #1

< Define Allowed Users

Details

Name * National Geographic Patron Group

Description

Created By WRLC Admin Created On 02/26/2025

Updated By WRLC Admin Updated On 02/26/2025

Input Parameters

+ Add Paramet

Name	Operator	Value
1 User Group	=	National Geographic Patron

- IP Address Rule
 - Name = [Affiliate Library] IP Address
 - Input Parameter
 - Name = IP Range
 - Operator = "="
 - Value = [IP range of affiliate library]
- **Save** the Restricted Search Group Definition

< Define Allowed Users

Details

Name * National Geographic IP address

Description

Created By WRLC Admin Created On 02/26/2025

Updated By WRLC Admin Updated On 02/26/2025

Input Parameters

[+ Add Parameter](#)

Name	Operator	Value
1 IP Range	=	192.245.136.189

7. Create a Hide from Network definition

This definition will prevent the affiliate library's bibliographic and item records from appearing in the other Primo instances in our Network.

- Configuration > Discovery > Search Configuration > Hide from Network definitions
- + Add Hide from Network Definition
- Choose a code and a name
- Then add the following Condition:
 - Search Index = Inventory > Location
 - Operator = Equals
 - Value = Location(s) associated with affiliate library
- **Add Condition**, then **Save** the Custom Scope

8. Create a custom local data search scope

- Configuration > Discovery > Search Configuration > Search Profiles
- Choose the **Custom Local Data Scopes** tab
- + Add a Custom Scope
- Choose a code and a name
- Then add the following Scope Condition:
 - Search Index = Inventory > Location
 - Operator = Equals
 - Value = Location(s) associated with affiliate library
- **Add Condition**, then **Save** the Custom Scope

Scope Details

Code *	<input type="text" value="natgeo_scope"/>	Name *	<input type="text" value="National Geographic Local Scope"/>
Description	<input type="text" value="Custom Local Scope for items with a location of *WRLC N"/>	Scope Population	<input checked="" type="radio"/> My Institution <input type="radio"/> Entire Network

Scope Conditions

[Clear Conditions](#) [+ Add a Condition](#)

-	Location	Equals	WRLC National Geographic	-
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9. Create a search profile

- Configuration > Discovery > Search Configuration > Search Profiles
- Choose the **Search Profiles** tab
- + Add a Search Profile
- Choose a code and a display name
- Then add the following scope:
 - Select Scope Type = Custom (Local Data)
 - Select Custom Scope = the custom scope created in step #6
- Click **Add and close**, then **Save** the Custom Search Profile

10. Create a Primo VE view for affiliate library users

- Configuration > Discovery > Display Configuration > Configure Views
- + Add View
- Choose a code and a name
- Choose the following settings as you work through the configuration pages
 - **General** tab > **Discovery Network Settings** section
 - Display locations from member institutions = No
 - Include member institution physical inventory in facets = Never

Discovery network settings

Display locations from member institutions	<input type="checkbox"/>	i	Display online services from member institutions	<input type="checkbox"/>	i
Include member institution physical inventory in facets	<input checked="" type="radio"/> Never	<input type="radio"/> Only in cross institution search	<input type="radio"/> Always	i	
Library Facet	<input type="radio"/> Do not display member libraries	<input checked="" type="radio"/> Display member libraries separately	<input type="radio"/> Display member libraries with my institution libraries		

- **Links Menu** tab
 - Only activate the following links
 - Library Search
 - Collections Discovery (if they have collections in the SCF IZ)
 - URL leading to the affiliate library website
- **Search Profile Slots** tab
 - + Add a Slot

- Choose a code and a name
- Select the search profile created in step #7
- Click Save
- Deactivate all other search slots
- **Advanced Search Configuration** tab > **List of Indexes** section
 - Deactivate all indexes associated with Course Reserves
 - Checkmark **Enable for Basic Search**
- **Brief Results** tab > **Facets** section
 - Deactivate all facets associated with Course Reserves
- **Manage Customization Package** tab
 - Using Primo Studio, change appearance, logo etc. of Primo to match the colors and logo of the affiliate library
- **Save** the new Primo view

11. Create user profile(s)

- When creating user profiles for affiliate libraries, make sure the following fields have the correct values:
 - **General Information** tab
 - Primary ID = work email address
 - User Group = user group created in step #1
 - Password = create a temporary password for the user, checkmark **Force password change on next login**
 - User Roles (the following are necessary to allow for users to log into the SCF IZ and create requests through Alma)
 - Patron
 - Circulation Desk Operator - Limited
 - Requests Operator
 - Physical Inventory Operator - Limited

User Roles							
1 - 4 of 4							
<input type="checkbox"/> Add Role <input type="checkbox"/> Add from Profiles <input type="checkbox"/> Remove Selected <input type="checkbox"/>							
Filter: All							
	<input type="checkbox"/>	Active	Role Name	Role Area	Scope	Parameters	Status Date
1.	<input type="checkbox"/>	<input checked="" type="checkbox"/>	Patron	Fulfillment	Shared Collections Facility	-	02/27/2025
2.	<input type="checkbox"/>	<input checked="" type="checkbox"/>	Circulation Desk Operator - Limited	Fulfillment	WRLC - Shared Collections Facility	DEFAULT_CIRC_DESK	02/27/2025
3.	<input type="checkbox"/>	<input checked="" type="checkbox"/>	Requests Operator	Fulfillment	WRLC - Shared Collections Facility	DEFAULT_CIRC_DESK	02/27/2025
4.	<input type="checkbox"/>	<input checked="" type="checkbox"/>	Physical Inventory Operator - Limited	Inventory	WRLC - Shared Collections Facility	-	02/27/2025

- **Contact Information** tab
 - Add address of affiliate library as the work address

12. Update letter configuration for pull slip

- Configuration > General > Letters > Letters Configuration
- Search for the letter titled **Ful Resource Request Slip Letter**, choose **Edit**
- Edit the XSL around line 100 to include the following example
- Click **Save Draft**
- Click **Save**

```
<!-- Internal Alma request from affiliate institution [Insert affiliate library here] -->  
<xsl:when test="(notification_data/user_for_printing/user_group='[User Group Code]')">  
<font size ="40px;">[Affiliate Library Name]</font>  
</xsl:when>
```

User Accounts in the SCF IZ

User Groups

Below are the active user groups in the Shared Collections Facility (SCF) Institution Zone (IZ)

User Group	User Group Code	Type	Notes
Library pickup locations	<i>wrlclib</i>	Internal	<p>Patron accounts that represent each library pickup location. When SCF items owned by one of our partner institutions are requested, they are checked out to these patron accounts in the SCF IZ.</p> <p>For more information about these accounts, please see the Patron Accounts for Libraries page on the Alma Wiki.</p> <p>For more information on the workflow of SCF requests, please see the Requests in the Remote Storage App page on the Alma Wiki.</p>
WRLC HQ Staff	<i>db wrlc</i>	Internal	Accounts for staff who work at WRLC headquarters.
Trinity Faculty	<i>tr fac</i>	External	<p>Accounts for Trinity University faculty. Imported via SIS.</p> <p>For more information on circulation workflows for Trinity, see the How to Bring up a Patron and Check Items Out page on the Alma Wiki.</p>

Trinity Student	<i>tr stud</i>	External	<p>Accounts for Trinity University students. Imported via SIS.</p> <p>For more information on circulation workflows for Trinity, see the How to Bring up a Patron and Check Items Out page on the Alma Wiki.</p>
Trinity Staff	<i>tr staf</i>	Internal	<p>Accounts for Trinity University staff. Manually created by staff at WRLC headquarters.</p> <p>For more information on circulation workflows for Trinity, see the How to Bring up a Patron and Check Items Out page on the Alma Wiki.</p>
National Geographic Patron	<i>natgeo</i>	Internal	<p>Accounts for staff at our affiliate library, National Geographic.</p> <p>For more information on configuring affiliate libraries, see the Affiliate Library Configuration page on the Alma Wiki.</p> <p>For more information on Affiliate Libraries at the WRLC, see the Affiliate Libraries page on the Alma Wiki.</p>
wrlc user	<i>wrlcuser</i>	External (Linked)	<p>Accounts for patrons from our partner libraries who have requested items owned by WRLC (primarily WRLC Shared Monographs) from the SCF IZ.</p>
AU Staff	<i>au staf</i>	Internal	<p>User group used by Ex Libris account (unable to delete or edit the account)</p>

Scheduled Jobs in the SCF IZ

System	Set	Updates	Description	Frequency
Alma Scheduled Jobs	Patron accounts where user group = empty AND job category = empty	User Group changed from empty to 'tri stud'	Students accounts are not given a user group when they are first imported to the SCF IZ; a job is scheduled to run every week (Mondays at 2am) that adds the 'tr stud' user group to a logical set containing new users where user group = empty, and job category = empty.	Weekly Monday at 2am
Alma Scheduled Jobs	Bib records where Linked to NZ = No AND Current Location of attached item is NOT wrlc shrm wrlc natg AND Provenance Code is NOT WRLC AND Suppressed = No AND Has Inventory = Yes	Suppress bib records in set	Bibliographic records for 'copied' items (item records that are copies from the Owing Institution's IZ) should always be suppressed. If an item is linked to an NZ Bib, the holdings records are automatically suppressed in the SCF IZ, however , bib records not linked to the NZ should be imported as suppressed. This scheduled job makes sure that any unsuppressed, unlinked bib records of 'copied' items are suppressed.	Every 3 months on day 1 at 4am
Alma Scheduled Jobs	Holdings records where Has Items = No	Delete the holdings record	Delete any holdings records that do not have items attached.	Monthly on 2nd Monday at 2am
Alma Scheduled Jobs	Bib records where Has Inventory = No	Delete the bib record	Delete any bib records that do not have items/holdings attached.	Monthly on 3rd Monday at 2am