SCF Remote Storage App

All things related to SCF processing of physical item requests from the SCF remote storage app.

- Delivery locations with Codes
- Physical item request that originated as an ILLiad physical item request
- Remote Storage Location Configuration
- Updating the Remote Storage Application configuration
- Adding a new pickup location for SCF material pickup

Delivery locations with Codes

Partners with Library Names, Pull Slip Codes and Courier Slip Code

Institution Name (IZ)	Library name	Location Code (Pull Slip)	Courier Slip Code
American University	American University Library	AU	AU
AU, Washington College of Law Library	Pence Law Library	AULAW	AU-WCL
Catholic University of America	Mullen Library	CU	CU
CUA, Columbus School of Law *	Law Library	(CU LAW) *	CU LAW
University of the District of Columbia	Main Library	DC	DC/UDC
UDC, Law School	UDC Law Library	DCL	?
Gallaudet University	Gallaudet University Library	GA	GA
George Mason University Libraries	Fenwick Library	GM	GM
	Mason Square Library	GMA	GM-A
	Mercer Library	GMP	
	Law Library	GMA	GML

Georgetown University	Lauinger Library	GT, GT-OD	GT
	Bioethics Research Library	GT-Bioethics	(GT)
	Blommer Science Library	GTB	(GT)
	School of Continuing Studies Library	GT-SCS	(GT)
	Woodstock Theological Library	GT-WTL	(GT)
GU, Law Library	Georgetown Law Library	GTL	GTL
George Washington University	Gelman Library	GW	GW
	Eckles Library	GWE	MTV
	Virginia Science & Technology Campus	GWN	GW-NVCL
	GW Online-Only Community	GWOC	(GW)
GWU, Himmelfarb Health Sciences Library	Himmelfarb Health Science Library	HI	HI
GWU, Jacob Burns Law Library	Jacob Burns Law Library	JB	GW-JB
Howard University	Founders Library	HU	HU
	Louis Stokes Health Sciences Library	HU-HS	HU-HS
	Law Library	HUWC	HU LAW

Marymount University	Reinsch Library	MU	MU
	Ballston Coakley Library Extension	MUB	MU-B
Shared storage institution	WRLC - Shared Collections Facility	WR	
	Trinity Library (for Trinity Patrons)	TR	TR
Trinity University Washington *	Trinity Main	(TR) *	TR

* Not configured as part of the CLS/AFN Fulfillment Network

Physical item request that originated as an ILLiad physical item request

ILLIad Physical Item Requests through Alma

The SCF will start to transition to filling ILLiad physical item requests through Alma. Currently these requests are made via email. These new requests can be identified as ILLiad requests using the pull slip. The pull slip for these requests will have an ILL number, return address, and delivery information where you would expect the Hold line, the patron's name, and The Due Date line. See example below:

QEAhHaeSO-yODRJkaART5JCua12P-McsRtzZ7jJqKw6QttlOVZKtqB1fTw0vvNh3

These requests would be pulled as any normal physical item request coming into the SCF IZ via Alma. Use the information on the “Mailing:” line to determine if an item should be mailed or sent to the owning library (some form of Yes for mailing, some form of No to send the item to the owning IZ.) If you are not certain, contact the owning library’s staff for clarification. For the most part, we would expect that not mailing the item would be the exception. In either case, you will scan the item in the SCF IZ to put it “In Transit”.

Mailing: Yes
If the item is to be sent to the requesting institution, use the “Please deliver to:” address for mailing. Be sure to include the pull slip with the item. You will also need to logon to the owning IZ with the SCFStaff account. You will need to scan the barcode (without the X) using the Default_Circ_Desk. This will place the item on the owning library’s “On Hold” shelf and notify the ILL Staff patron that the item is being sent.

Mailing: No

If the item is not to be mailed to the ILL borrower, then follow standard procedure. Send to the owning library via the courier.

These loaned items will be returned to the owning libraries and come back to the SCF via the courier.

Remote Storage Location Configuration

Configuring a Physical Location as a Remote Storage Location

This configuration enables requests for items in the location to be exported to the Remote Storage Application. These instructions assume you are creating a new location, but they can be used to configure an existing location as well.

Prerequisites

Prerequisites should already be configured in your IZ.

- An integration profile of “remote storage” type that is connected to the S/FTP site for the remote storage app.

cE9mCIev8VKCPbllNe6Zbw8EfhVK8hByucL3U_sjt2lgxrWHzA9gKZ0MiX1hrQ9k3

- A Remote Storage Facility at the IZ level connected to the remote storage integration profile.

E7f-rH3NKv_dutplZuXmuOSh_wZOf0dZd72FgUQTAFnPCqD5KxXJwY47nZrE9kr

- A circulation desk representing the WRLC SCF storage where items are reshelved.

IY6_-1ldQAucqKV9kKOWa0GyHr-XXvBVImZqyRJHlBMHu-hB2Gv5LvKomirL4fM

Creating/Editing the Location

At the Library level, go to Alma Configuration > Fulfillment > Locations > Physical Locations and “+ Add Location”. **Type** should be “Remote Storage” and **Remote Storage** is “Shared Collections Facility”. Next, edit the location to add circulations desks using the “Attach Existing Circulation Desk” menu. Attach two desks: One is the circ desk that your operators who process items at this location are assigned to; it should *not* have the option to reshelve items in the remote storage locations. The other is the “WRLC SCF Storage” desk; it does have “Reshelve” checked.

Ul1_TodWiqh9uqDFiR2_WW-d1TcAg5d_KSWxvxYMueqbnDbYuidvjYSnK6YLc-B

Integration with the SCF Remote Storage App

In order for the Remote Storage App to recognize this location, it must be added to the app's configuration file, so let WRLC know what the location's code is.

If you want to publish new items added to this new location to accession them into the SCF, the location must be added to the logical set that is used by the Publishing Profile we set up for accessioning. Please coordinate this also with WRLC so we can be sure that it is done without causing the publishing job ID to change or to have existing items in the SCF re-published.

Updating the Remote Storage Application configuration

In the updated Azure web app version of the Remote Storage Application, configurations (including storage locations for all IZs) are stored on the sftp server at sftp.wrlc2k.wrlc.org in a file named conf.json.

The config.json file is found at:

Production IZs: /home/scfapp/Alma/conf.json
PSB: /home/scfapp/AlmaRSA-PSB/conf.json

You'll need to be at WRLC HQ or on the WRLC VPN to update conf.json.

To make updates to the config file, use an FTP client such as FileZilla to download conf.json to your local computer. Then make your desired changes and re-upload it to the same location via FTP.

Once the config file is updated on the server, it must be loaded into the Remote Storage Application by visiting the following the URL:

Production IZs: https://almarsa.wrlc.org/configuration

PSB: https://almarsa-psb.wrlc.org/configuration

You can then check the Remote Storage Application's log files to verify that the conf file loaded successfully.

This page will be updated with additional file information once the web app is deployed to production IZs.

Adding a new pickup location for SCF material pickup

These instructions are when a new pickup location has been added to an Institution Zone, AND SCF materials can be picked up at the new location.

If a new pickup location is added and SCF materials are NOT put on hold at this location, then the only instructions that need to be followed are found on the Adding a New Pickup Location (Library) page. If SCF materials CAN be put on hold at the new location, the instructions on the page listed above should be followed, ***along with the instructions below***.

The SCF configuration has three parts:

1. Create a pseudo-patron account in the Shared Collections Facility Institution Zone.
2. Add the new library to the Remote Storage application's `conf.json` file.
3. Update and test the Shared Collections Facility pull slip.

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1. Create the Pickup Location Account in the SCF Institution Zone

The Remote Storage workflow uses a pseudo-patron account in the Shared Collections Facility Institution Zone to represent the pickup library. The account's name and preferred-name fields also provide routing information used by the SCF workflow and pull slip. For general information about these types of accounts, see the Patron Accounts for Libraries page.

Gather the Required Information

Before creating the account, confirm:

- Institution Zone Alma code
- New library's **Organization Unit Code**
- Institution name
- Library name
- Pull slip or courier routing code

- Appropriate home address for the library

Use the Alma codes, not the display names, when constructing the Primary Identifier.

Construct the Primary Identifier

Use the following format:

`01WRLC_[Institution Zone Alma Code]-[New Library Code]`

For example:

`01WRLC_DOC-DCVN`

In this example:

- `DOC` is the Institution Zone's Alma code.
- `DCVN` is the new library's Organization Unit Code.

Confirm the identifier carefully before saving the account. The Institution Zone and library codes must match the codes used in Alma and the Remote Storage configuration.

Add the User Account

1. Log in to the **Shared Collections Facility Institution Zone**.
2. Navigate to:
   Admin > User Management > Manage Users
3. Select **Add User**.
4. Select **Add Staff User**.
5. Complete the account fields as follows:

Alma field	Value
Record Type	Staff
First Name	Name of the pickup library
Last Name	Name of the pickup library
Preferred First Name	`Deliver To:`
Preferred Last Name	Pull slip or courier routing code
Primary Identifier	`01WRLC_[Institution Zone Alma Code]-[New Library Code]`
User Group	Library Pickup Locations

Use the same library name in the **First Name** and **Last Name** fields unless existing SCF pseudo-patron accounts follow a different established convention.

6. Complete any other fields that Alma requires.

7. Select **Add User** or **Save and Continue**.

Add Email, Home Address, and Statistics

1. Open the user account's **Contact Information** tab.
2. Under **Email Addresses**, select **Add Email Address**.
3. Enter:
   `scf-pseudo-patrons@wrlc.org`
4. Select the appropriate email type.
5. Mark the address as **Preferred.**
6. In the **Contact Information** tab, locate **Addresses**.
7. Select **Add Address**.
8. Enter the appropriate address for the pickup library.
9. Set **Address Type** to **Home**.
10. Mark the address as **Preferred**, unless another local convention applies.
11. Open the user account's **Statistics** tab.
12. Select **Add Statistic**.
13. Add the following statistic:

Statistical category	Value
Account Type	Library Account

4. Select **Add and Close**.
5. Select **Add Statistic** again.
6. Add the following statistic:

Statistical category	Value
Patron's Home Institution	Name of the Institution Zone

7. Select **Add and Close**.
8. Select **Save** to save the completed user record.

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2. Update the Remote Storage Configuration File

The Remote Storage application's `conf.json` file identifies the WRLC institutions, libraries, and remote-storage locations recognized by the application.

The new library must be added to the configuration before the application can route its requests correctly. For more information on the location of the conf.json file, please see the WRLC Alma Wiki page on the Remote Storage App Configuration.

Update the Sandbox Configuration First

The sandbox and production environments use separate copies of `conf.json`. Updating the sandbox file does not update production.

1. Locate the sandbox Remote Storage configuration file.
2. Download the current sandbox `conf.json`.
3. Save an unchanged backup copy before editing it.
4. Record the date and environment in the backup filename.
5. Open the working copy in a plain-text or code editor that supports JSON.

Do not edit the production file until the sandbox configuration has been validated and tested.

Locate the Institution Entry

1. Search the file for the applicable Institution Zone code.
2. Locate the institution under the `institutions` section.
3. Confirm that the value under the institution's `code` property matches the intended Institution Zone.
4. Locate the institution's `libraries` configuration.

Use an existing library entry at the same institution as a model. Preserve the file's existing structure, indentation, property names, and data types.

Add the New Library

1. Add the new library beneath the appropriate institution's `libraries` section.
2. Enter the new library's **Organization Unit Code**.
3. Do not enter the library's display name unless the configuration structure explicitly requires both a code and a name.
4. Confirm that the code matches the value in:
   Configuration > General > Libraries > Add a Library or Edit Library Information

JSON syntax must be exact. Pay particular attention to:

- Opening and closing braces
- Opening and closing brackets
- Quotation marks
- Commas between entries
- Duplicate property names
- Whether the existing `libraries` value is an array or an object

Follow the structure of a working library entry rather than creating a new structure.

Add Remote Storage Location Codes, If Applicable

Complete this step only if the new library owns items stored at the Shared Collections Facility and has Alma locations configured as Remote Storage locations.

1. Identify every applicable remote-storage physical location in the Institution Zone.
2. Record each location's **code**, not its display name.
3. Add the codes beneath the new library's `remote_storage_location` configuration.
4. Follow the same JSON structure used by another library with SCF inventory.
5. Confirm that each value matches the physical location code configured in Alma.

A library that is only a pickup location, and does not have its own inventory stored at the SCF, may not require a `remote_storage_location` entry.

Upload and Test the Sandbox File

1. Upload the updated sandbox `conf.json` to the same SFTP directory and filename used by the Remote Storage sandbox application.
2. Confirm that the uploaded file has the expected size and modification date.
3. Submit a Service Desk ticket requesting that the sandbox Remote Storage application be restarted.
4. After the restart, test a request with the new library as the pickup location.
5. Confirm that the application starts successfully and recognizes the new library.

If the application does not start or the request fails, restore the previous `conf.json` and request another restart.

Update Production

After sandbox testing succeeds:

1. Download the current production `conf.json`.
2. Save an unchanged backup copy.
3. Apply the same approved change to the production file.
4. Do not overwrite production with the complete sandbox file. The two environments may contain different configuration values.
5. Upload the updated production file to the correct SFTP directory.
6. Confirm the file's size and modification date.
7. Submit a Service Desk ticket requesting that the production Remote Storage application be restarted.
8. Complete a production test after the restart.

Retain the previous production file until the new configuration has been tested successfully.

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3. Update the Shared Collections Facility Pull Slip

The Shared Collections Facility uses its own pull-slip configuration. It does not use the Network Zone version of the letter.

Update the SCF letter so requests sent to the new pickup library display the correct destination and courier-routing information.

- Log in to the **Shared Collections Facility Institution Zone**.
- Open the **Configuration Menu**.
- Navigate to:
  General > Letters > Letters Configuration
- Search for:
  Ful Resource Request Slip Letter
- Open the row-actions menu and select **Edit**.
- Review the letter's labels and XSL template.
- Search the template for conditions involving:
  - Pickup library code
  - Destination library code
  - Request type
  - Patron Primary Identifier
  - Preferred first or last name
  - Existing WRLC pickup locations
  - Institution or courier routing codes

1. Locate the conditional logic used for another pickup library at the same institution.
2. Use that condition as the model for the new library.
3. Add the new library code, circulation desk code, pseudo-patron Primary Identifier, or other value required by the existing template logic.
4. Add the applicable information:
   1. Library name
   2. Destination or pull-slip routing code
   3. Pickup location
   4. Shipping or handling instructions
   5. Local notes requested by the institution
5. Confirm that all codes match Alma and the Remote Storage `conf.json` file.
6. Place the new condition before any general fallback condition that could otherwise capture the request.
7. Preserve the behavior for all existing pickup locations.
8. Select **Save Draft** while testing, if available.
9. Preview the letter with representative XML, if available.
10. Select **Save** when the update is ready.

Final SCF Verification

Before announcing that SCF items can be picked up at the new library, confirm that:

- The SCF pseudo-patron account exists and contains the correct values.
- The Primary Identifier uses the required WRLC format.
- The preferred name contains the correct `Deliver To:` routing information.

- The sandbox `conf.json` was updated, validated, restarted, and tested.
- The production `conf.json` was updated separately and validated.
- The production Remote Storage application was restarted.
- The SCF pull slip was updated.
- An SCF request successfully routed to the new library.
- The existing SCF pickup locations continue to work.
- Backups of the previous configuration files and letter template were retained.