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.

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