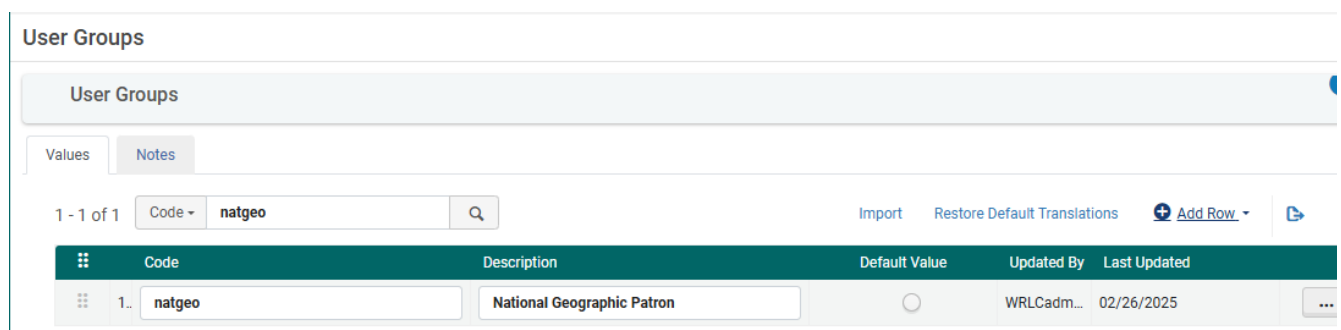


# Affiliate Library Configuration in the SCF

## 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

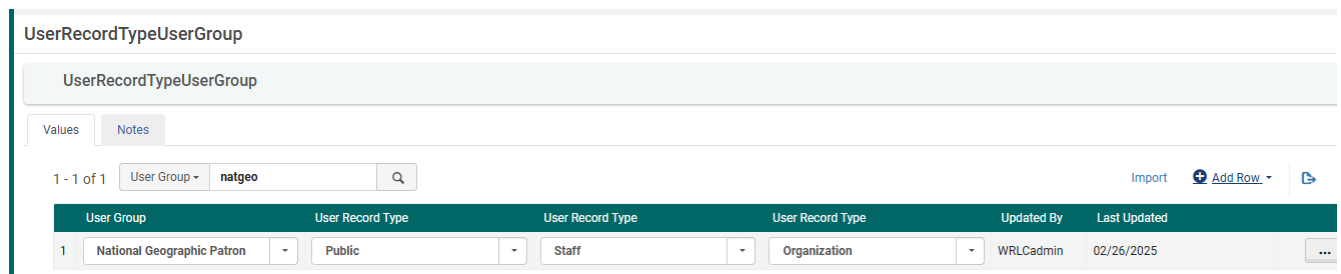
1 - 1 of 1 Code natgeo

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

#### 4. Associate user group with Fulfillment Unit

- Configuration > Fulfillment > Physical Fulfillment > Fulfillment Units
- **Edit** the Fulfillment Unit **Library Delivery Only**
- Choose the **Fulfillment Unit Rules** tab
- Choose the Rule Type **Loan** from the drop down menu
- Edit the **Library Delivery Loan** rule

**Edit Fulfillment Unit** Cancel

You are configuring: **Shared Collections Facility**

**Library Delivery Only**

Fulfillment Unit Details | **Fulfillment Unit Locations** | Fulfillment Unit Rules

Rule Type: **Loan**

Institution Rules List + Add Rule

Filter: All

Enabled	Move Up	Move Down	Rule Name	Description	Output	Updated By	Update Date
<input checked="" type="checkbox"/>		▼	<b>Library Delivery Loan</b>	Loan period for pseudo-patrons	Library Delivery Loan	WRLC Admin	02/26/2025
<input checked="" type="checkbox"/>	▲	▼	Fill ILL physical requests	testing	Library Delivery Loan	Katherine Kilduff	09/15/2020
<input checked="" type="checkbox"/>	▲	▼	Faculty Non-circulating	To allow for renewal of pre-re-arch	Faculty Non-circulating	Katherine Kilduff	09/29/2020
<input checked="" type="checkbox"/>	▲		Default Non-circulating	Not loanable to any other user group	Default Non-circulating	WRLC Admin	09/29/2020

- Add the user group created in step #1 to the list of User Groups in the Input Parameters
- **Save** the Fulfillment Unit

**Fulfillment Unit Rules Editor** Cancel

**Library Delivery Only**

Code: LIBRARY-X

Fulfillment Unit Rules Editor

Name \* **Library Delivery Loan**

Description **Loan period for pseudo-patrons**

Created By: WRLC Admin      Created On: 07/22/2020

Updated By: WRLC Admin      Updated On: 02/26/2025

Input Parameters + Add Parameter

Name	Operator	Value
1 <b>User Group</b>	In List	<b>Library pickup locations, National Geographic Patron</b>

Output Parameters

Terms of Use \* **Library Delivery Loan** TOU Details Add Terms Of Use

- Go back to the **Fulfillment Unit Rules** tab
- Now choose the Rule Type **Request** from the drop down menu
- Edit the **Library Delivery Request** rule

< Edit Fulfillment Unit Cancel

You are configuring: **Shared Collections Facility**

Library Delivery Only

Fulfillment Unit Details | Fulfillment Unit Locations | **Fulfillment Unit Rules**

Rule Type: **Request**

Institution Rules List + Add Rule

Filter: All

	Enabled	Move Up	Move Down	Rule Name	Description	Output	Updated By	Update Date
1.	<input checked="" type="checkbox"/>		▼	<b>Library Delivery Request</b>	Allow personal delivery for requests by Library pseudo-patrons (for new SCF architecture)	Library Delivery Request	WRCL Admin	02/26/2025
2.	<input checked="" type="checkbox"/>	▲	▼	Fill ILL Requests	Allow digitization requests by ILL Staff user group	Library Delivery Request	WRCL Admin	07/22/2020
3.	<input checked="" type="checkbox"/>	▲	▼	Digitization Only	all digitization requests for wrlc users - can be removed later	Requestable Non CIRC	WRCL Admin	07/22/2020
4.	<input checked="" type="checkbox"/>	▲		No FN Requesting	Don't allow requesting in the Fulfillment Network	No FN Requesting	WRCL Admin	07/22/2020

- Add the user group created in step #1 to the list of User Groups in the Input Parameters
- **Save** the Fulfillment Unit

## 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			
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"/>	<a href="#">i</a>	Display online services from member institutions	<input type="checkbox"/>	<a href="#">i</a>
Include member institution physical inventory in facets	<input checked="" type="radio"/> Never	<input type="radio"/> Only in cross institution search	<input type="radio"/> Always	<a href="#">i</a>	
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>
```

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Revision #7

Created 27 February 2025 01:32:49 by Jackie Saavedra

Updated 20 March 2026 20:09:39 by Jackie Saavedra