

AFN Institution Zone Configurations

The following Automated Fulfillment Network (AFN) configurations are set in each WRLC Institution Zone. Settings will look slightly different depending on whether the Institution Zone is both a lender and borrower in the WRLC AFN, or if they are only a borrower.

For a list of all partner profiles in the WRLC AFN, as well as their borrowing and lending preferences, see the [Consortial Partners in CLS/AFN](#) page.

For information on how to edit the CL Request link in Primo, see the [Display Logic Rules for the AFN/CLS Request Form in Primo](#) page.

Resource Sharing Library

Configuration > Configuring drop-down menu = [choose your institution's Main Library] > Fulfillment > Library Management > Library Details

Your resource sharing library is the library where your temporary borrowing and lending locations are housed. For the WRLC AFN, your institution's Main Library is the designated Resource Sharing Library.

Resource Sharing Information section

- Is Resource Sharing Library = Yes
- Itemless = No
- Symbol = [ISO symbol]

Borrowing Setup section

- Cancel request on locate failure = Yes
- Automatically activate locate profile = Yes
- Temporarily inactive for borrowing = No
 - This can be switched to Yes for a specific period of time, for example if the Library is closed
- Default location = CLS Borrowing Library
- Default pickup location = [Institution's Library]

- Extend due date when renew requested = No

Resource Sharing Information

Is resource sharing library

Itemless

Symbol

BORROWING SETUP

Cancel request on locate failure

Automatically activate locate profile

Temporarily inactive for borrowing

Default location

Default pickup location

Extend due date when renew requested

Lending Setup section

Please note that the Lending Setup portion of the Resource Sharing section is **NOT** used by the WRLC AFN. This is because our AFN handles all lending requests as regular hold requests within the owning Institution's IZ; they are NOT considered true lending requests by Alma. For more information, see the Alma Knowledgebase page [Automated Fulfillment Network Requests \(AFN\)](#)

LENDING SETUP

Automatically locate resource

Reject request when locate fails

Reject request when no available items

Reject request when no requestable items

Reject request when only electronic available [Electronic Rejection Rules](#)

Ignore electronic resources

Ignore electronic resources for physical-only requests

Prefer Uresolver locate results

Automatic creation

Temporarily inactive for lending

Inactive dates range

Default location

Similarly, the AFN follows the settings in each Institution's Locate Profile to find a matching item, NOT the settings in the Lending Setup section of the Library Details page. This is because our AFN handles all lending requests as regular hold requests within the owning Institution's IZ; they are NOT considered true lending requests by Alma.

Locate by fields

Locate only if all fields match Yes No



Title

Author

ISBN / ISSN

System Control Number

Edition

ISSN (010)

Other Standard ID

Barcode

DOI

NOT USED BY
AFN

For more information, see the Alma Knowledgebase page [Configuring Parameters of a Resource Sharing Library](#)

Temporary Resource Sharing Locations

Configuration > Configuring drop-down menu = [*choose your institution's Main Library*] > Fulfillment > Locations > Physical Locations

- CLSBORR (CLS Borrowing Library location)
 - Item records for AFN items borrowed from other libraries will be given the temporary borrowing location CLSBORR.

- IZs that only borrow in the WRLC AFN will only have the CLSBORR location configured in their IZ. For a list of all partner profiles in the WRLC AFN, as well as their borrowing and lending preferences, see the [Consortial Partners in CLS/AFN](#) page.
- CLSLEND (CLS Lending Library location)
 - Although there is a location named **CLSLEND**, it is NOT used in the AFN workflow. Items lent out via AFN will have a status of **Loan**, but will not be given a temporary location. Meanwhile, items lent out in either Peer 2 Peer or Rapido requests are given the **CLSLEND** temporary location.

Physical Locations List

1 - 2 of 2

[+ Add Location](#) [Share](#) [Refresh](#)

Location Type: All Attached Fulfillment Unit: DCVN_FU [Clear all](#)

Code	Name	Type	Fulfillment Unit	
1 CLSLEND	CLS Lending Library	Closed	DCVN_FU	...
2 CLSBORR	CLS Borrowing Library	Closed	DCVN_FU	...

For more information, see the Alma Knowledgebase page [Configuring Physical Locations](#)

Temp Item Creation Rule

Configuration > Configuring drop-down menu = [choose your institution's Main Library] > Fulfillment > Library Management > Temporary Item Creation Rules

These are rules that dictate what location and item policy are given to temporary item records created by AFN requests.

- Rule Name = Temporary item rule
- Location = CLSBORR
- Item Policy = 4 week loan

< Temporary Item Creation Rule Cancel Save

Temporary Item Creation

Name *


Description

Created By WRLC Admin Created On 05/03/2018

Updated By WRLC Admin Updated On 05/03/2018

Input Parameters

[+ Add Parameter](#)


No records were found.

Output Parameters

Location Item Policy

Please note that the length of loans are dictated by TOUs and fulfillment units, NOT the item policy assigned to CLS items

For more information, see the Alma Knowledgebase page [Configuring Temporary Item Creation Rules](#)

Fulfillment Units

Configuration > Fulfillment > Physical Fulfillment > Fulfillment Units > Edit Fulfillment Unit > Fulfillment Unit Details tab

Fulfillment Units are one or more physical locations in an institution that follow the same fulfillment policies. Similarly, the Network Zone has a [fulfillment unit for WRLC's AFN](#), that dictates the rules by which items circulate in the fulfillment network.

NZ-managed Fulfillment Units can be applied to institutional Fulfillment Units. The WRLC AFN Fulfillment Unit (named **WRLC Fulfillment Network**) should be applied to Institutional fulfillment Units that are requestable through the AFN.

- On Shelf Request Policy = Request for pickup anywhere regardless of availability
- Use Rules from Network Fulfillment Unit = WRLC Fulfillment Network

- Choose the WRLC Fulfillment Unit from the drop-down menu if the institutional Fulfillment Unit is requestable through the AFN
- If the Fulfillment Unit is NOT requestable through the AFN, choose a non-requestable option for the On Shelf Request Policy and leave this field blank

< Edit Fulfillment Unit

Fulfillment Unit Details

Fulfillment Unit Locations

Fulfillment Unit Rules

Code * **General**

Description

Name * **General**

On Shelf Request Policy * Request for pickup anywhere regardless of availability

Request for pickup in different library only

Request for pickup in different campus only

No Requesting from available holding

No Requesting

Use Rules From Network Fulfillment Unit WRLC Fulfillment Network

WRLC Fulfillment Network

Use Network Rules First

For more information, see the Alma Knowledgebase page [Configuring Fulfillment Units](#)

Sending Borrowing Request Rules

Configuration > Fulfillment > Resource Sharing > Sending Borrowing Request Rules

Sending Borrowing Request Rules dictate when a borrowing request is sent automatically to an active partner institution without staff intervention.

- CLS Sending Request
 - Input Parameters
 - Name = Partner
 - Operator = In List
 - Value = American University, Catholic University, Gallaudet University, George Mason University, George Washington University, Georgetown University, Howard University, Marymount University, Shared Collection Facility, University of DC
 - Output Parameters
 - Send Request = True

Sending Borrowing Request Rules

Name *

Description

Created By Network Created On 06/11/2018

Updated By Network Updated On 10/09/2019

Input Parameters

+ Add Parameter -

Name	Operator	Value	
1 Partner	In List	Catholic University, Gallaudet University, George Mason University, George Washington University, Georgetown University, Howard University, Marymount University, Shared Collection Facility, University of DC	...

Output Parameters

Send Request * ▾

For more information, see the Alma Knowledgebase page [Configuring Sending Borrowing Request Rules](#)

Rota Assignment Rules

Configuration > Fulfillment > Resource Sharing > Rota Assignment Rules

Rota Assignment Rules assign Rota Templates to specific requests, based on specified criteria.

The following assignment rule is configured in each individual Institution Zone.

The Copy of CLS Book Borrowing rule should be at the top of the list.

The priority of Institution rules versus Network rules is determined by the *network_rota_assignment_rules_precedence* setting found in **Configuration > Fulfillment > General > Other Settings**. The default setting for WRLC is **FALSE** (IZ rules take precedent over NZ rules).

Rules		Notes						
Alt + 1 Rota Assignment Rules List								
+ Add Rule 📄 ⚙️								
Filter: All ▾								
Enabled	Move Up	Move Down	Rule Name	Description	Managed in Network	Updated By	Update Date	
1. <input checked="" type="checkbox"/>		▾	Copy of CLS Book Borrowing	NZ-managed rota assignment for fulfillment network book requests		Staff, Ex Libris	06/11/2018	⋮

- Copy of CLS Book Borrowing
 - Input Parameters
 - Name - Requested Format
 - Operator - =
 - Value - Physical
 - Output Parameters
 - Rota Templates - CLS Physical

Rota Assignment Rules

Name *

Description

Created By Admin, WRLC Created On 06/11/2018

Updated By Staff, Ex Libris Updated On 06/11/2018

Input Parameters

+ Add Parameter ▾ | 📄 | ⚙️

Name	Operator	Value	
1 Requested Format	=	Physical	⋮

Output Parameters

Rota Templates * X ☰

For more information, see the Alma Knowledgebase page [Configuring Rota Assignment Rules](#)

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