

Affiliate Library Configuration

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	WRLCadm...	02/26/2025

3. Associate library location with Fulfillment Unit

- Configuration > Fulfillment > Physical Fulfillment > Fulfillment Units
- **Edit** the Fulfillment Unit **Library Delivery Only**
- 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

The screenshot shows the 'Edit Fulfillment Unit' page for 'Library Delivery Only'. The 'Fulfillment Unit Rules' tab is active. The 'Rule Type' is set to 'Loan'. Below, the 'Institution Rules List' table shows four rules. The first rule, 'Library Delivery Loan', is highlighted in yellow.

Enabled	Move Up	Move Down	Rule Name	Description	Output	Updated By	Update Date	
<input checked="" type="checkbox"/>		▼	Library Delivery Loan	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

The screenshot shows the 'Fulfillment Unit Rules Editor' for 'Library Delivery Only'. The 'Name' is 'Library Delivery Loan' and the 'Description' is 'Loan period for pseudo-patrons'. The 'Input Parameters' table shows one parameter: 'User Group' with the value 'Library pickup locations, National Geographic Patron'.

Name	Operator	Value	
User Group	In List	Library pickup locations, National Geographic Patron	...

- 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

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
<input checked="" type="checkbox"/>		▼	Library Delivery Request	Allow personal delivery for requests by Library pseudo-patrons (for new SCF architecture)	Library Delivery Request	WRLC Admin	02/26/2025
<input checked="" type="checkbox"/>	▲	▼	Fill ILL Requests	Allow digitization requests by ILL Staff user group	Library Delivery Request	WRLC Admin	07/22/2020
<input checked="" type="checkbox"/>	▲	▼	Digitization Only	all digitization requests for wrlc users - can be removed later	Requestable Non CIRC	WRLC Admin	07/22/2020
<input checked="" type="checkbox"/>	▲		No FN Requesting	Don't allow requesting in the Fulfillment Network	No FN Requesting	WRLC 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 a restricted search group for Primo VE

- 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 WRRLC Admin Created On 02/26/2025

Updated By WRRLC Admin Updated On 02/26/2025

Input Parameters

+ Add Parameter

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 WRRLC Admin Created On 02/26/2025

Updated By WRRLC Admin Updated On 02/26/2025

Input Parameters

+ Add Parameter

Name	Operator	Value
1 IP Range	=	192.245.136.189

6. 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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7. 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

8. 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

9. 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						
+ Add Role + Add from Profiles - Remove Selected						
Filter: All						
<input type="checkbox"/>	Active	Role Name	Role Area	Scope	Parameters	Status Date
1.	<input checked="" type="checkbox"/>	Patron	Fulfillment	Shared Collections Facility	-	02/27/2025
2.	<input checked="" type="checkbox"/>	Circulation Desk Operator - Limited	Fulfillment	WRLC - Shared Collections Facility	DEFAULT_CIRC_DESK	02/27/2025
3.	<input checked="" type="checkbox"/>	Requests Operator	Fulfillment	WRLC - Shared Collections Facility	DEFAULT_CIRC_DESK	02/27/2025
4.	<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

10. 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>
```

Revision #4

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

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