

NZ Configuration

Configuration steps taken in the Network Zone.

For reference, see "Configuring Fulfillment Information in the Network Zone"

([https://knowledge.exlibrisgroup.com/Alma/Product_Documentation/010Alma_Online_Help_\(English\)/100Managing_Multiple_Institutions_Using_a_Network_Zone/05_Fulfillment_in_Consortia/010Configuring_Fulfillment_Information_in_the_Network_Zone](https://knowledge.exlibrisgroup.com/Alma/Product_Documentation/010Alma_Online_Help_(English)/100Managing_Multiple_Institutions_Using_a_Network_Zone/05_Fulfillment_in_Consortia/010Configuring_Fulfillment_Information_in_the_Network_Zone))

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1. Configure Borrowing and Lending workflows

Configuration ? Fulfillment ? Resource Sharing ? Workflow Profiles

ExLibris Configuring: Washington Research Library Consortium (WRLC) Network

Workflow Profiles

[+ Add Workflow Profile](#)

Workflow Profile	Type	Steps
1 CLS Borrowing RS	Borrowing	Automatic renew,Cancelled By Patron,Cancelled by partner,Cancelled by staff,Manual renew,Recalled by partner,Reject,Request accepted,Waiting for receive digitally
2 CLS Lending RS	Lending	Cancel reply,Lender check in,Patron renewal,Renewal response,Staff renewal

Note: Later as part of the configuration for Resource Sharing with SUNY 2 additional profiles were added. TBD - SUNY, Other configurations.

ExLibris Configuring: Washington Research Library Consortium (WRLC) Network

Workflow Profiles

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Workflow Profile	Type	Steps
1 CLS Borrowing RS	Borrowing	Automatic renew,Cancelled By Patron,Cancelled by partner,Cancelled by staff,Manual renew,Recalled by partner,Reject,Request accepted,Waiting for receive digitally
2 CLS Lending RS	Lending	Cancel reply,Lender check in,Patron renewal,Renewal response,Staff renewal
3 SUNY Borrowing RS	Borrowing	Automatic renew,Cancelled By Patron,Cancelled by partner,Cancelled by staff,Conditional,Damaged communicated,Declared lost by partner,Lender check in,Lost communicated,Manual renew,Reject,Renew requested,Request accepted,Will supply
4 SUNY Lending RS	Lending	Borrower recall,Cancel reply,Conditional,Lender check in,Patron renewal,Staff renewal

2. Create locate profiles

Configuration ? Fulfillment ? Resource Sharing ? Locate Profiles

Type is "Fulfillment Network"

The screenshot shows a web interface for creating a locate profile. The page title is "Locate Profile Details". At the top right, there are "Cancel" and "Save" buttons. Below the title bar, there is a header area with "AU" and a right-pointing arrow. Below this, there are two tabs: "Locate Profile Details" (selected) and "Locate Profile Parameters". The main form area contains three fields: "Name * AU", "Description * American University Library", and "Type Fulfillment Network" (with a dropdown arrow). A blue sidebar with various icons is visible on the left side of the screen.



< Locate Profile Details

AU

Locate Profile Details Locate Profile Parameters

Server * Port

Username Password

Institution *

- Alma Network
- Check item availability
- Check item requestability
- Allow locate by metadata
- Locate by fields

Locate only if all fields match Yes No



<input type="checkbox"/> Author	<input type="checkbox"/> Barcode
<input type="checkbox"/> DOI	<input type="checkbox"/> Edition
<input checked="" type="checkbox"/> ISBN / ISSN	<input checked="" type="checkbox"/> LCCN (010)
<input checked="" type="checkbox"/> System Control	<input type="checkbox"/> Other Standard ID
Number	
<input checked="" type="checkbox"/> Title	

Test Connection

3. Create Partners

Alma → Fulfillment → Resource Sharing → Partners