

Alma Premium Sandbox Post-Refresh Procedure: Shrinking the Rota, Checklist

- **Product:** Alma Premium Sandbox

Description

This is the recommended procedure post PSB refresh, to narrow-down the Rota and Resource-Sharing Partners in the premium sandbox.

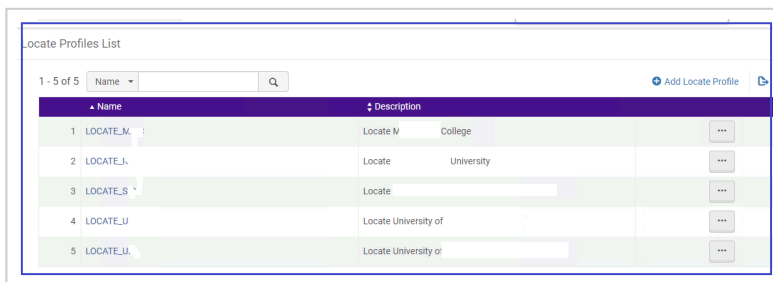
Post-Refresh Resource Sharing Configuration Updates

Preparation Steps:

1. Create a list of **Premium** Sandboxes environments in the network
2. Network Zone and Institution Zone checks:
 - Verify that the person performing this process can connect (open support ticket as relevant), search, perform activities as expected.

Login to the NETWORK PSB premium environment and follow these steps:

1. **Locate Profiles** (Configuration > Fulfillment > Resource Sharing > Locate profile) - **delete** Locate Profiles for Institutions who are not in the PSB environment. **Keep the profiles which were identified as Premium Sandbox**, during the Post-Refresh Check above.



The screenshot shows a web interface titled "Locate Profiles List". It features a search bar with "1 - 5 of 5" results, a search icon, and an "Add Locate Profile" button. Below the search bar is a table with the following data:

Name	Description	
1 LOCATE_M	Locate M College	...
2 LOCATE_U	Locate University	...
3 LOCATE_S	Locate	...
4 LOCATE_U	Locate University of	...
5 LOCATE_U	Locate University of	...

- **Edit the Locate Profiles.** The **server** needs to reflect the **PSB environment**:

- "Locate Profile Details" tab:

- "Locate Profile Parameters" tab" should have the **PSB URL**:

2. **Partners** (Fulfillment menu > Resource Sharing > Partners) - **Note - DO NOT delete other partners, only review Premium Sandbox partners**

Name	Code	Status	Profile Type
1. FN_... University	FN_...	Active	Fulfillment Network
2. FN_... University	FN_...	Active	Fulfillment Network
3. FN_... College	FN_...	Active	Fulfillment Network
4. FN_... University	FN_...	Active	Fulfillment Network

- **Edit the Partners to ensure that the Server reflects PSB URL** (do not change the customer code):

3. **Rota Templates** (Fulfillment menu > Resource Sharing > Rota templates) - edit the existing Rota and **remove all Partners, except the Premium Sandbox partners**:

Name	Code	Profile Type	Status
1 FN	FNJ	Fulfillment Network	Active
2 FN	FNJ	Fulfillment Network	Active
3 FN Ch	FNJ	Fulfillment Network	Active
4 FN Ca	FNJ	Fulfillment Network	Active
5 FN	FNJ	Fulfillment Network	Active

4. **Rota Assignment Rules (Fulfillment Configurations > Resource Sharing > Rota Assignment Rules) - Review, but do not change.**

5. **Sending Borrowing Request Rules (Fulfillment Configurations > Resource Sharing > Sending Borrowing Request Rules)**

- **Remove the list of partners from the rule and add only the Premium Sandbox partners:**

6. **Run the Resource Sharing Distribution Job:**

- Go to Admin > Manage Jobs and Sets > Monitor Jobs > Scheduled Jobs tab
- Filter for "Fulfillment" and find the **"Distribute central resource sharing configuration"** Job
- Choose **"Run Now"** from the Actions menu
 - Or, run **"Distribute resource sharing network configuration"** from the Fulfillment menu):

11	<input type="checkbox"/>	<input type="checkbox"/>	Users - Remove Blocks	Fulfillment	-	Every day at 04:00	02/15/2020 04:00:00 EST	...
12	<input type="checkbox"/>	<input checked="" type="checkbox"/>	Distribute central resource sharing configuration	Fulfillment	-	Every day at 03:00	02/15/2020 03:00:00 EST	...
13	<input type="checkbox"/>	<input type="checkbox"/>	Expired Resource Sharing Requests	Fulfillment	-	Every day at 02:00	02/15/2020 02:00:00 EST	Run Now Job History
14	<input type="checkbox"/>	<input type="checkbox"/>	Distribute network fulfillment changes to members	Fulfillment	-	Every day at 01:00	02/15/2020 01:00:00 EST	Email Notifications

- Review the Job Report, there should be numbers in it. If there is zero in the report - recheck the configuration.
 - Connect to the Institution Zones, to see that the configuration was updated.
 - If the Rota template, Partners or Locate Profiles were not updated by the distribution job, **re-save** the configuration on the NETWORK and run the distribution job again.

7. **Test:**

- Place a Borrowing Request in a single institution (from Alma or Primo) and walk through the end-to-end process of a Resource Sharing Request.

We hope you enjoy the new environment!

-
- **Article last edited:** 04-DEC-2020