Network Zone Management

EX LIBRIS
Knowledge Days

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Introduction

The Network Zone setup in Alma enables unique opportunities to…

- Maximize cooperation and limit data duplication via a shared catalog
- Improve management of resources and users across the consortium
- Enhance patron experiences with Discovery, Resource Sharing, and more
- Provide consistent services across members of the consortium

…while still allowing for individual customization and local data

Introduction

- The Network Zone allows the consortium to centrally manage and support the following:
    - Shared Catalog
    - Centralized Electronic Resources
    - Vendors and Licenses
    - Shared Reporting and Analysis
    - Administration and Configuration

Introduction

This session is intended for:

- **Network Administrators**
  - Learn more about what options are available for Network management and configuration
- **Institution Members**
  - See how these options can fit into your local workflows

- Bibliographic Record Management
- Centralized Electronic Resources

Break

- Vendors and Licenses
- Network Analytics
- Central Configurations

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Bibliographic Record Management

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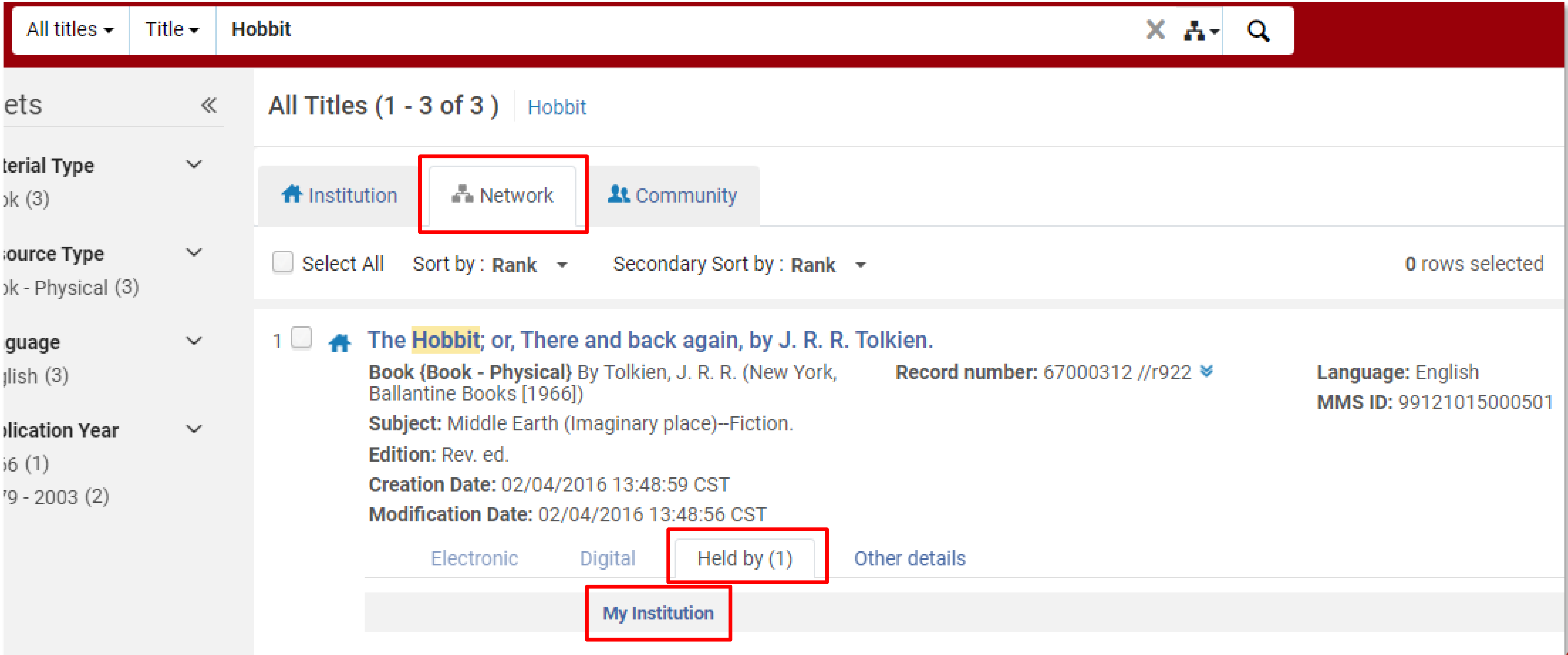
Repository Search

- Searching in the **Network** scope displays the Network record and consortial holdings


All titles
Title
Hobbit
ets
terial Type
ok (3)
source Type
ok - Physical (3)
guage
glish (3)
olication Year
66 (1)
79 - 2003 (2)
All Titles (1 - 3 of 3)
Hobbit
Institution
Network
Community
Select All
Sort by : Rank
Secondary Sort by : Rank
0 rows selected
Electronic
Digital
Held by (1)
Other details
My Institution

1 The Hobbit; or, There and back again, by J. R. R. Tolkien.

Book {Book - Physical} By Tolkien, J. R. R. (New York, Ballantine Books [1966])

Record number: 67000312 //r922

Language: English

MMS ID: 99121015000501

Subject: Middle Earth (Imaginary place)--Fiction.

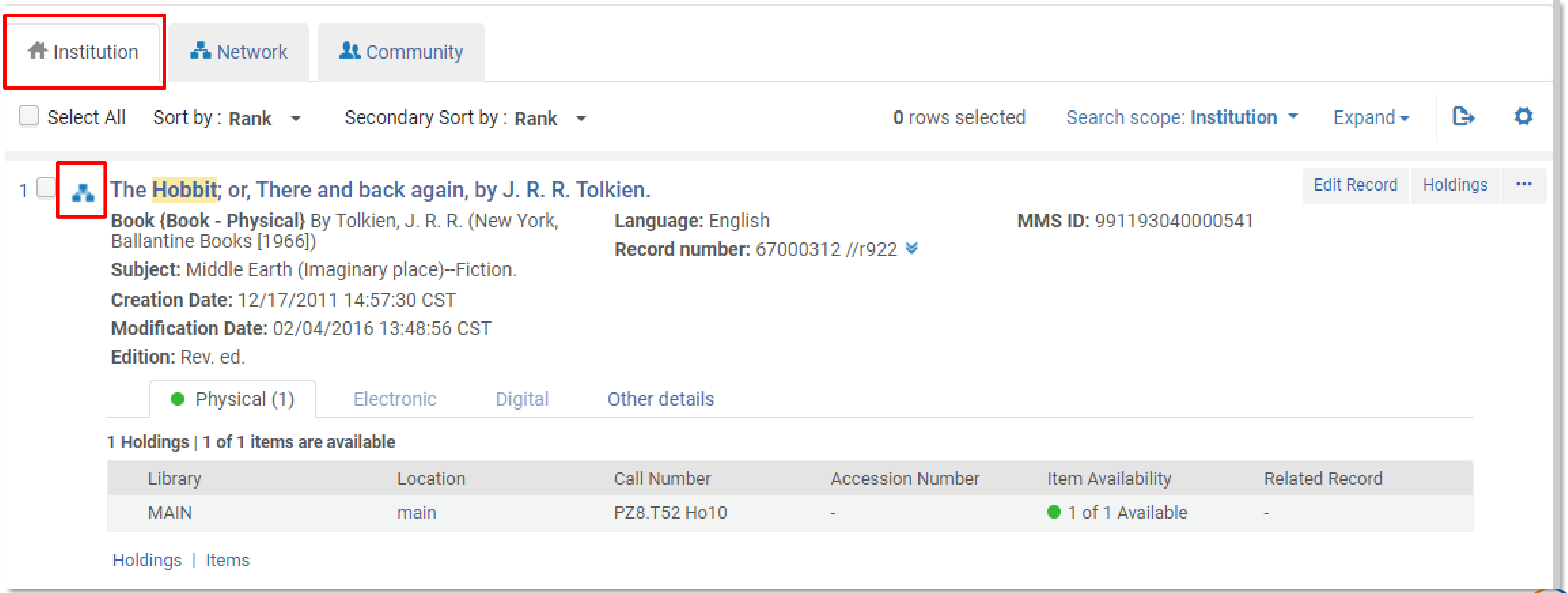
Edition: Rev. ed.

Creation Date: 02/04/2016 13:48:59 CST

Modification Date: 02/04/2016 13:48:56 CST

Repository Search

- Searching in the **Institution** tab shows the local holdings and indicates that this is a Network-linked record



Institution
Network
Community
Select All
Sort by : Rank
Secondary Sort by : Rank
0 rows selected
Search scope: Institution
Expand
Edit Record
Holdings
···

1 The Hobbit; or, There and back again, by J. R. R. Tolkien.

Book {Book - Physical} By Tolkien, J. R. R. (New York, Ballantine Books [1966])

Subject: Middle Earth (Imaginary place)--Fiction.

Creation Date: 12/17/2011 14:57:30 CST

Modification Date: 02/04/2016 13:48:56 CST

Edition: Rev. ed.

Language: English

Record number: 67000312 //r922

MMS ID: 991193040000541

● Physical (1)
Electronic
Digital
Other details

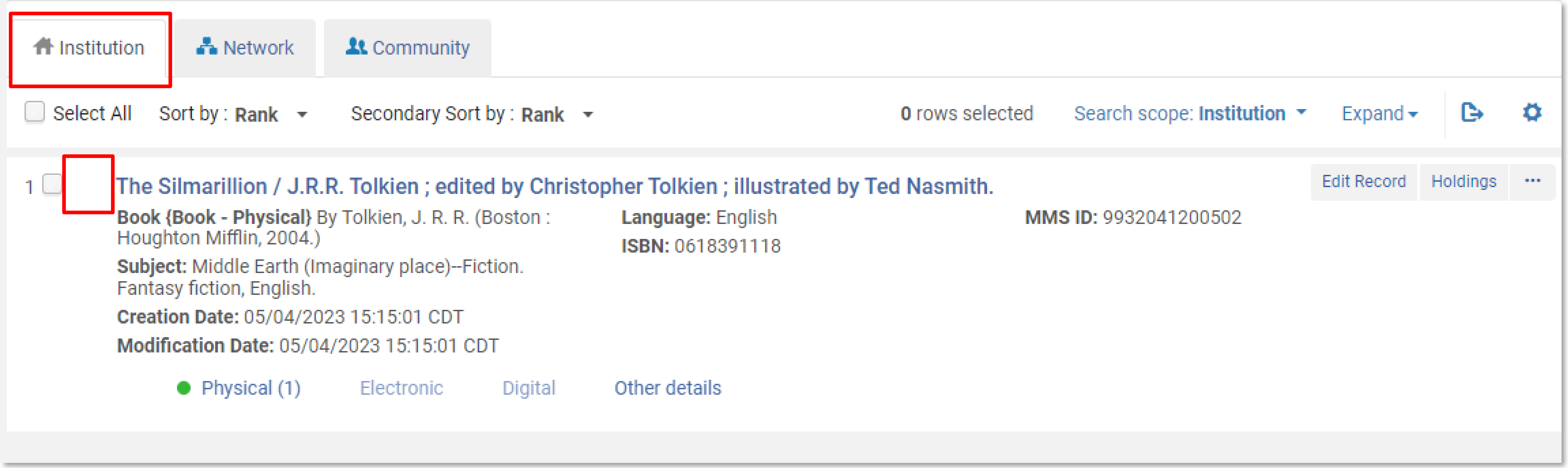
1 Holdings | 1 of 1 items are available

Library	Location	Call Number	Accession Number	Item Availability	Related Record
MAIN	main	PZ8.T52 Ho10	-	● 1 of 1 Available	-

Holdings | Items

Repository Search

- Searching in the **Institution** tab will also retrieve local records that are **not** linked to the Network


Institution
Network
Community
Select All
Sort by : Rank
Secondary Sort by : Rank
0 rows selected
Search scope: Institution
Expand
Edit Record
Holdings
...

1 The Silmarillion / J.R.R. Tolkien ; edited by Christopher Tolkien ; illustrated by Ted Nasmith.

Book {Book - Physical} By Tolkien, J. R. R. (Boston : Houghton Mifflin, 2004.)

Subject: Middle Earth (Imaginary place)--Fiction. Fantasy fiction, English.

Creation Date: 05/04/2023 15:15:01 CDT

Modification Date: 05/04/2023 15:15:01 CDT

Language: English

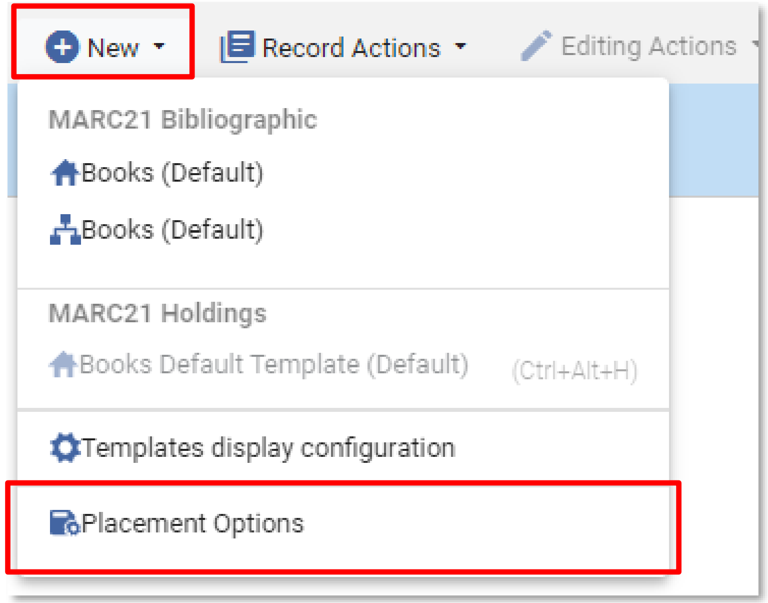
ISBN: 0618391118

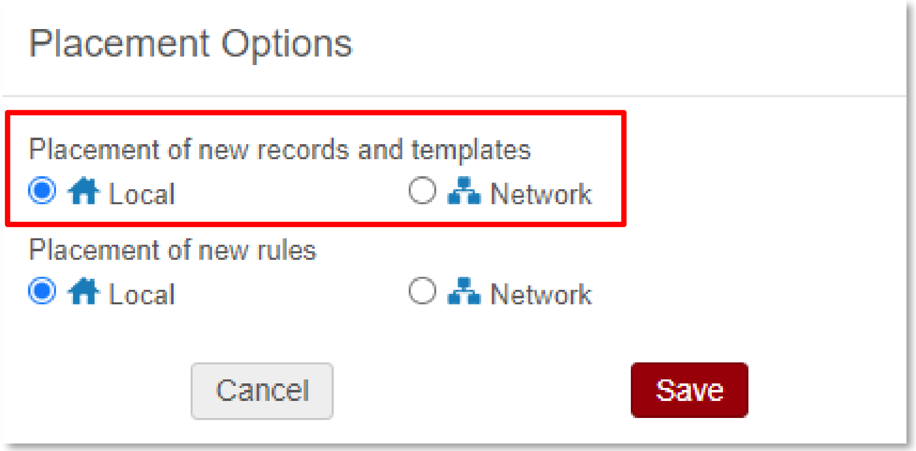
MMS ID: 9932041200502

● Physical (1) Electronic Digital Other details

Creating New Records

- Specify whether new records should be created in the Institution Zone or Network Zone using the **Placement Options** settings
  - MD Editor > New > Placement Options


New
Record Actions
Editing Actions
MARC21 Bibliographic
Books (Default)
Books (Default)
MARC21 Holdings
Books Default Template (Default)
(Ctrl+Alt+H)
Templates display configuration
Placement Options


Placement Options

Placement of new records and templates
● Local ○ Network

Placement of new rules
● Local ○ Network

Cancel
Save

Creating New Records

- The **central_record_management** parameter controls where new records are created
  - Configuration > Resources > General > Other Settings
- Possible values:
  - DEFAULT_INSTITUTION
  - DEFAULT_NETWORK
  - ENFORCE_NETWORK

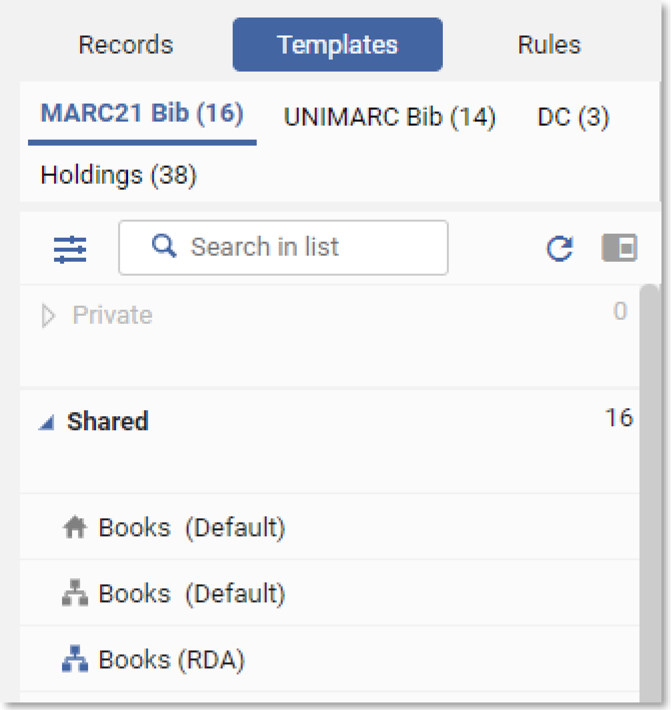
Creating New Records

- Placement Options affect which external search resources are available
  - When **Placement of new records and templates** is set to the Network Zone, the list of available external search resources reflects those that are enabled in the Network
  - When **Placement of new records and templates** is set to the Institution Zone, the list of available external search resources reflects those that are enabled in the Institution

Creating New Records

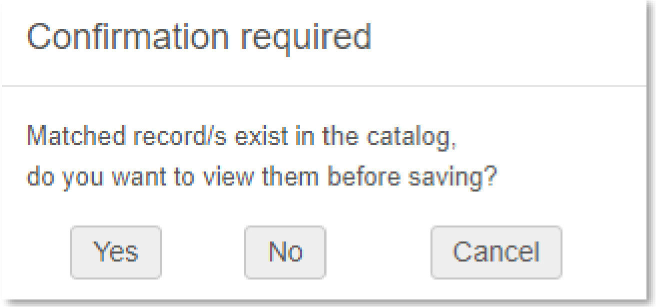
- Templates created by or saved to the Network can be used by all member institutions

- Even if using a Network Template, a local record can be created based on the Placement Options


Records
Templates
Rules
MARC21 Bib (16)
UNIMARC Bib (14)
DC (3)
Holdings (38)
Search in list
Private
0
Shared
16
Books (Default)
Books (Default)
Books (RDA)

Contributing Local Records to the Network

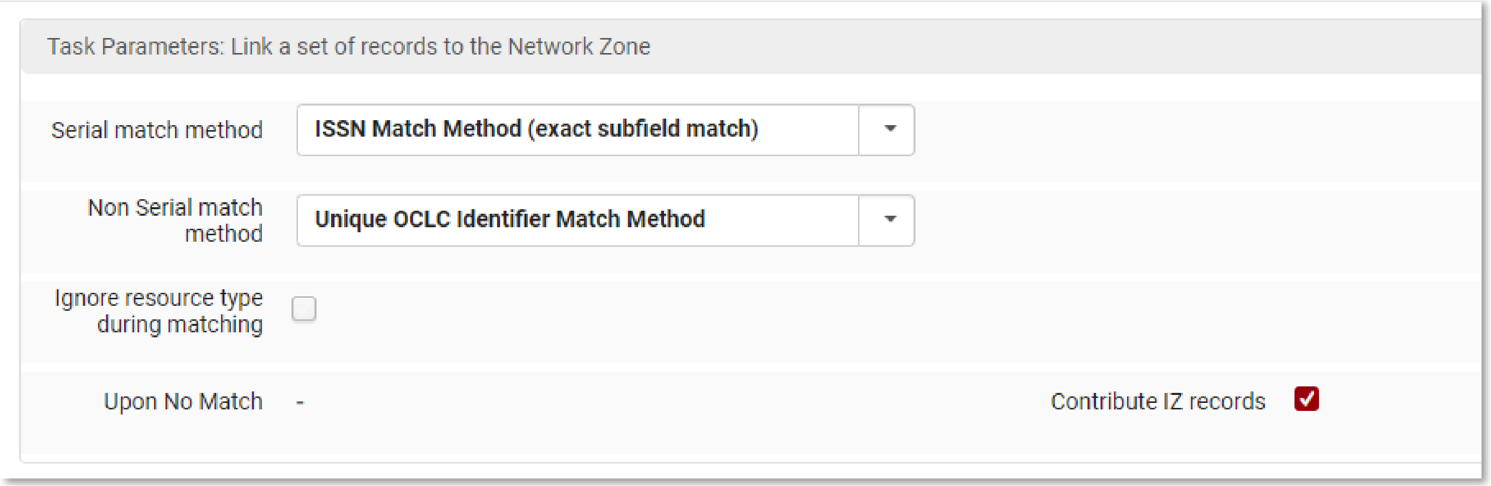
- Record Actions > Validate in Network
  - Checks the record against the Network's validation routines
- Record Actions > Share With Network
  - Alma will check if a matching record already exists in the Network
  - If a matched record is found, you can view the match and link your local record to the Network record
  - If the matched record is incorrect, choose No to contribute the record to the Network anyway
    - Be careful to avoid creating duplicates


Confirmation required

Matched record/s exist in the catalog, do you want to view them before saving?

Linking Local Records to the Network in Bulk

- A set of local records can be linked to Network Zone records in bulk by running the **Link a set of records to the Network Zone** job
- Specify how records should match and whether to contribute IZ records if there is not a match



Task Parameters: Link a set of records to the Network Zone

Serial match method: ISSN Match Method (exact subfield match)

Non Serial match method: Unique OCLC Identifier Match Method

Ignore resource type during matching ☐

Upon No Match -

Contribute IZ records ☑

https://knowledge.exlibrisgroup.com/Alma/Product_Documentation/010Alma_Online_Help_(English)/050Administration/070Managing_Jobs/020Manual_Jobs_on_Defined_Sets#Link_a_Set_of_Records_to_the_Network_Zone

Editing Network Records

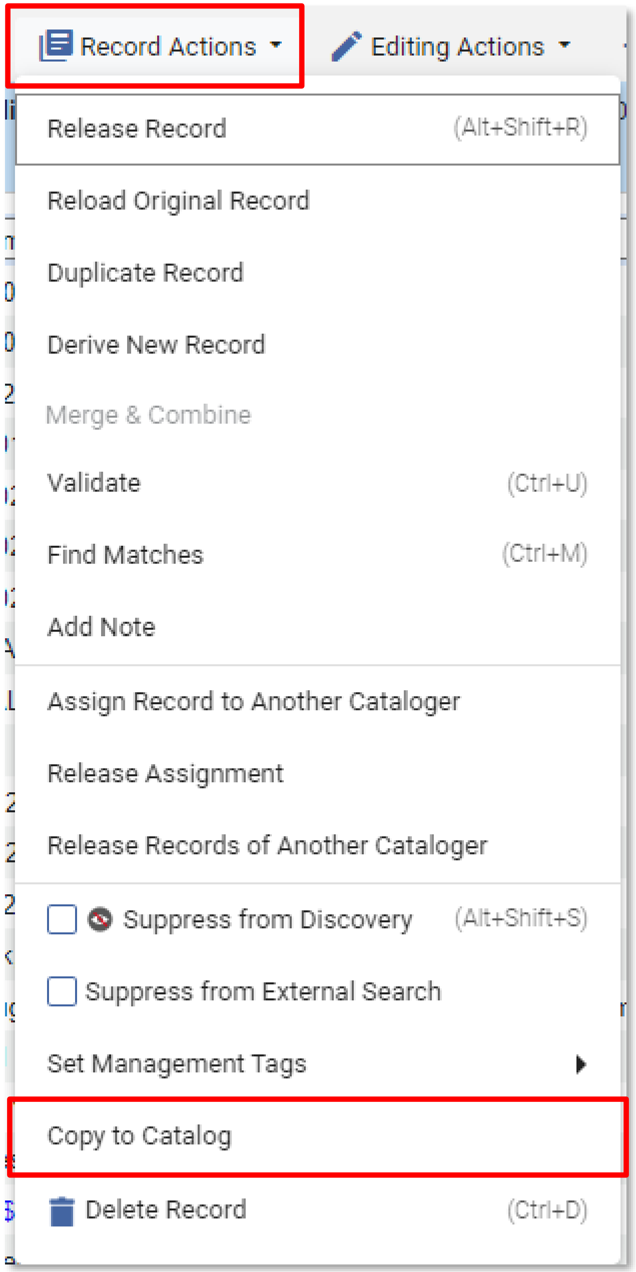
- Clicking **Edit Record** on a Network-linked record in the Institution Zone scope opens the Network record for editing
- Edits to Network records are automatically reflected in linked institution records
- When looking at versions, is possible to see which cataloger at another member institution edited a record
  - Set parameter **show_version_cataloger_name_for_other_members** to true in the Network Zone
  - Configuration > Resources > General > Other Settings

New!

Editing Network Records

- When editing a Network record, unlink it and create a local record by clicking Record Actions > Copy to Catalog

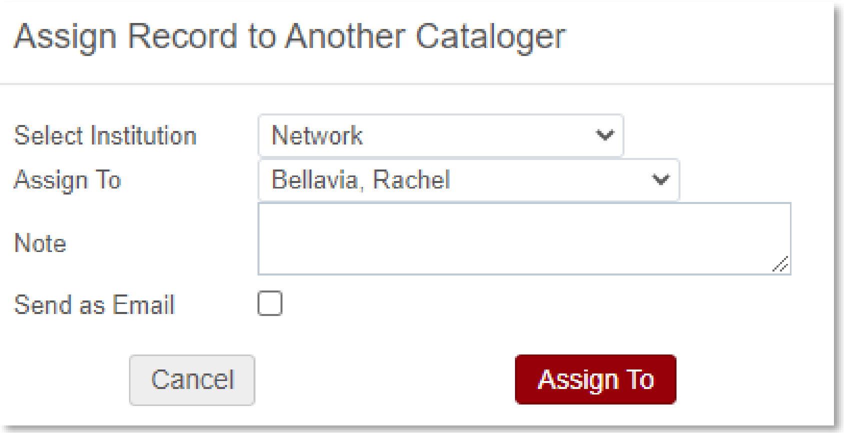
- Records can be unlinked in bulk by running the **Unlink a set of records from the Network** job


Record Actions
Editing Actions
Release Record (Alt+Shift+R)
Reload Original Record
Duplicate Record
Derive New Record
Merge & Combine
Validate (Ctrl+U)
Find Matches (Ctrl+M)
Add Note
Assign Record to Another Cataloger
Release Assignment
Release Records of Another Cataloger
☐ Suppress from Discovery (Alt+Shift+S)
☐ Suppress from External Search
Set Management Tags
Copy to Catalog
Delete Record (Ctrl+D)

Editing Network Records

- Assign records to catalogers at other institutions
  - Set parameter **enable_nz_record_assignment** to true in the Network Zone
  - Configuration > Resources > General > Other Settings

- Click Record Actions > Assign Record to Another Cataloger
  - Select another Institution or the Network
  - Choose a cataloger to assign the record to



Assign Record to Another Cataloger

Select Institution: Network

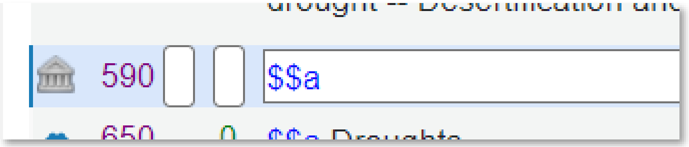
Assign To: Bellavia, Rachel

Note:

Send as Email ☐

Add Local Extensions

- Add local data to MARC 77X/78X, 09X, 59X, 69X, and 9XX fields
- In the MD Editor, use Editing Actions > Add Local Extension
- Local extensions will be visible only to the institution and not any other members
- Local extensions are identified by the institution icon



590 $$a

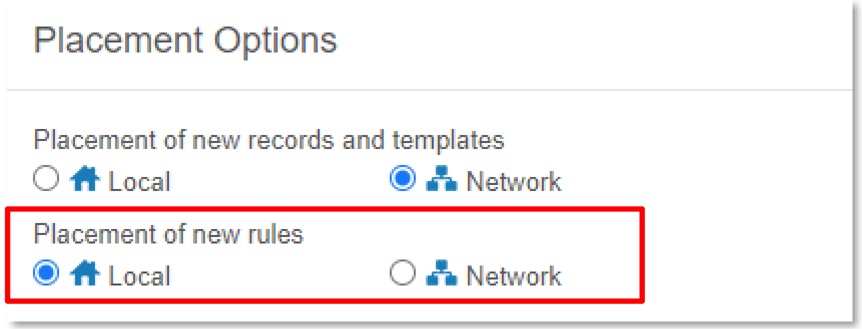
Add Local Extensions

- Local extensions can be added to Network-linked records in bulk using normalization rules
    - Adding subfield 9 **local** is required to create a local extension
    - Example: addSubField "996.9.local" if (exists "996.a.ABC")
- When running a normalization job on Network-linked records, only local extensions will be updated or deleted

https://knowledge.exlibrisgroup.com/Alma/Product_Documentation/010Alma_Online_Help_(English)/Metadata_Management/040Working_with_Bibliographic_Records/070Working_with_Local_Extension_Fields_for_Community_Zone_Records

Normalization Rules

- Rules can be saved to either the Institution or Network



Placement Options

Placement of new records and templates
○ Local ● Network

Placement of new rules
● Local ○ Network

- Rules need to be saved in the same scope as the record being normalized
  - Only Local normalization rules are available for Institution records
  - Only Network normalization rules are available for Network records
- To normalize Network records in bulk, the normalization process must be run in the Network Zone

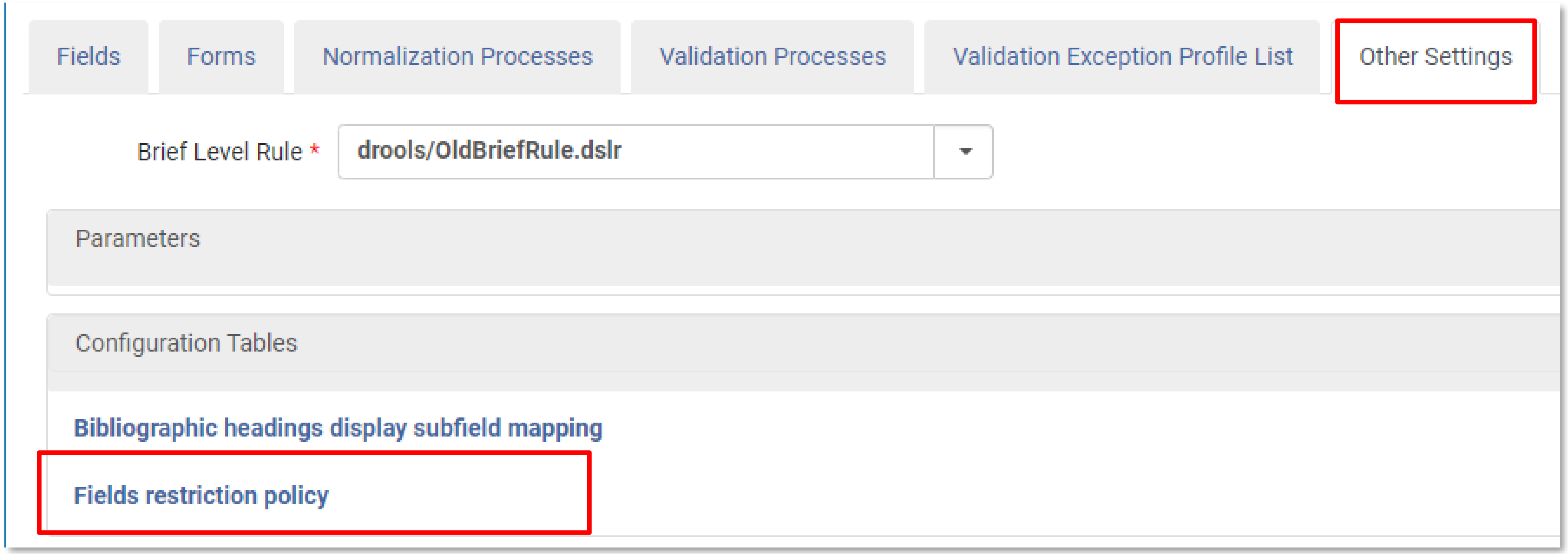
Restrict Editing Bibliographic Fields

- Network administrators can control which bibliographic fields can be edited by member institutions
- This can prevent unwanted edits of specific fields to maintain quality control of Network records
- Restrictions can be configured in the **Fields restriction policy** table

https://knowledge.exlibrisgroup.com/Alma/Product_Documentation/010Alma_Online_Help_(English)/040Resource_Management/080Configuring_Resource_Management/260Restrict_Editing_of_Metadata_Fields

Restrict Editing Bibliographic Fields

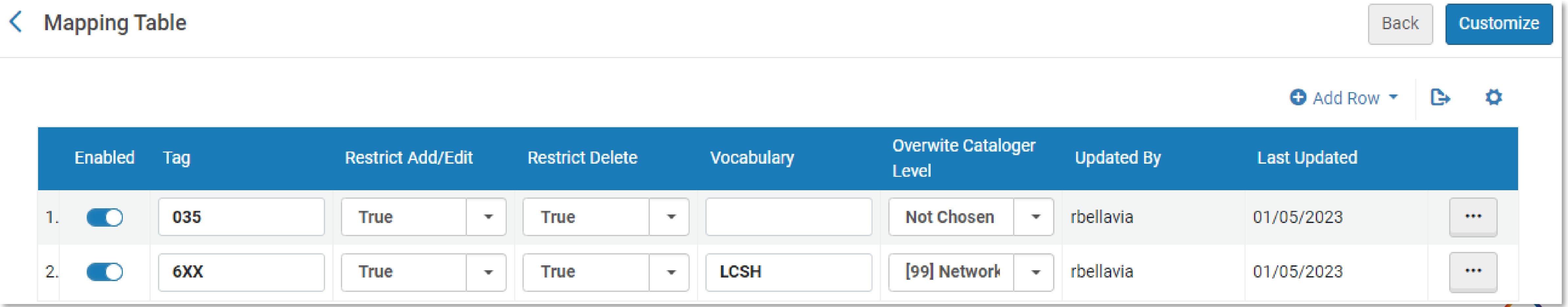
- Restricted fields are configured in the Network Zone:
  1. Configuration > Resources > Cataloging > Metadata Configuration
  2. Select the relevant Metadata Profile (e.g., MARC21 Bibliographic)
  3. Other Settings tab > Fields restriction policy


Fields
Forms
Normalization Processes
Validation Processes
Validation Exception Profile List
Other Settings
Parameters
Configuration Tables
Bibliographic headings display subfield mapping
Fields restriction policy

Brief Level Rule * drools/OldBriefRule.dslr

Restrict Editing Bibliographic Fields

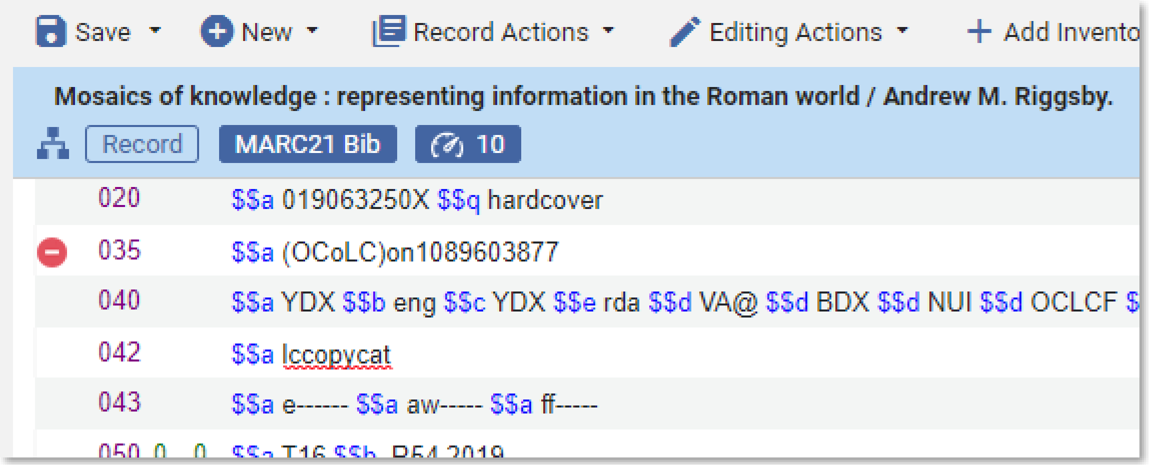
- Configuration Options:
  - Tag
  - Restrict Add/Edit
  - Restrict Delete
  - Vocabulary
  - Overwrite Cataloger Level



	Enabled	Tag	Restrict Add/Edit	Restrict Delete	Vocabulary	Overwrite Cataloger Level	Updated By	Last Updated	
1.	●	035	True	True		Not Chosen	rbellavia	01/05/2023	···
2.	●	6XX	True	True	LCSH	[99] Network	rbellavia	01/05/2023	···

Restrict Editing Bibliographic Fields

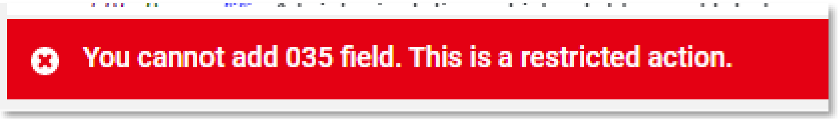
- When a member institution edits a Network record, they will not be able to edit restricted fields


Save
New
Record Actions
Editing Actions
Add Invento
Record
MARC21 Bib
10

Mosaics of knowledge : representing information in the Roman world / Andrew M. Riggsby.

```
020         $$a 019063250X $$q hardcover
035         $$a (OCoLC)on1089603877
040         $$a YDX $$b eng $$c YDX $$e rda $$d VA@ $$d BDX $$d NUI $$d OCLCF $
042         $$a lccopycat
043         $$a e------ $$a aw----- $$a ff-----
050 0   0   $$a T16 $$b .R54 2019
```

- Attempting to add a restricted field will result in an error



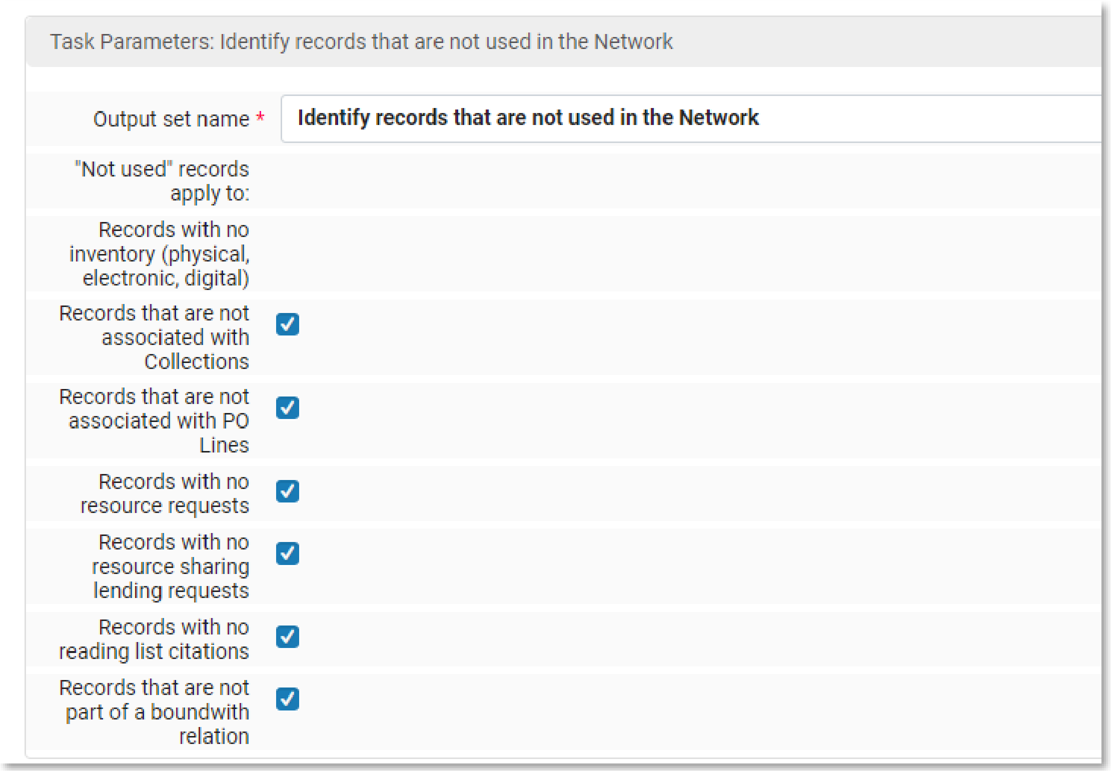
You cannot add 035 field. This is a restricted action.

Delete Unused Records in the Network Zone

- **Identify records that are not used in the Network** job

- The job will create a set of the identified records

- Criteria can be specified when identifying records



Task Parameters: Identify records that are not used in the Network

Output set name *	Identify records that are not used in the Network
"Not used" records apply to:	
Records with no inventory (physical, electronic, digital)	
Records that are not associated with Collections	☑
Records that are not associated with PO Lines	☑
Records with no resource requests	☑
Records with no resource sharing lending requests	☑
Records with no reading list citations	☑
Records that are not part of a boundwith relation	☑

https://knowledge.exlibrisgroup.com/Alma/Product_Documentation/010Alma_Online_Help_(English)/050Administration/070Managing_Jobs/020Manual_Jobs_on_Defined_Sets#Identify_records_that_are_not_used_in_the_Network

Centralized Electronic Resources

Centralized Electronic Resources

- Electronic collections and portfolios are managed in the Network Zone
- Service is made available for institutions via Inventory Network Groups
- Proxy activation and parser parameters are defined for each institution in the Network Zone

When to add an e-resource to the NZ?

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- Packages that are purchased by the consortium
- Resources that are owned by many of the member institutions
- Recommended to have a central office or knowledgeable staff with NZ access

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Inventory Network Groups

Configuration > Resources > General > Inventory Network Groups

- Groups can be defined as
  - All institutions
  - Specific groups of institutions
  - Individual institutions
- Groups are then associated with an electronic resource

Examples

- Availability not defined in group settings
- Availability defined for all institutions
- Availability defined for only one institution

Library-Specific Parser Parameters

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- Some electronic resources require library-specific parameters (LOC_ID, customer_id, etc.)
- These can be defined by adding group settings at the service or portfolio level
- Need to be defined for each specific institution

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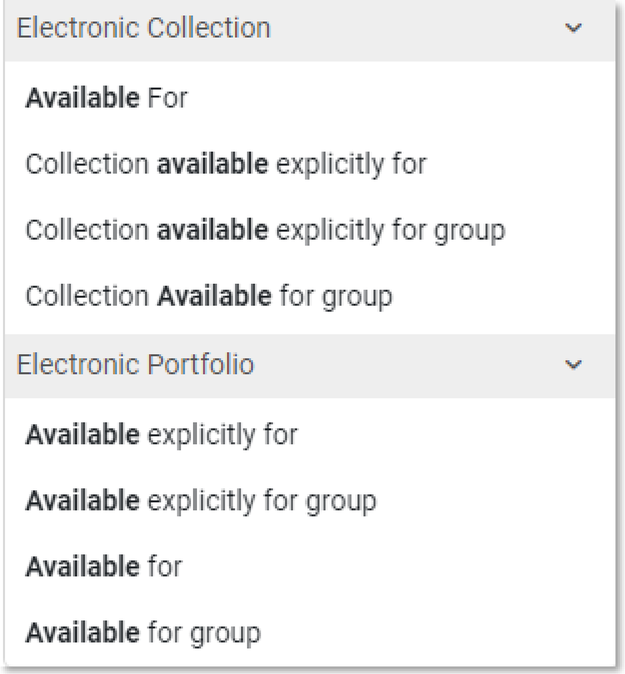
Repository Search

- Search indexes for portfolios and collections:
    - Available explicitly for
    - Available explicitly for group
    - Available for
    - Available for group



Electronic Collection

Available For

Collection **available** explicitly for

Collection **available** explicitly for group

Collection **Available** for group

Electronic Portfolio

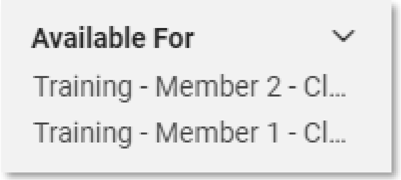
Available explicitly for

Available explicitly for group

Available for

Available for group

- Available For is also a facet in search results



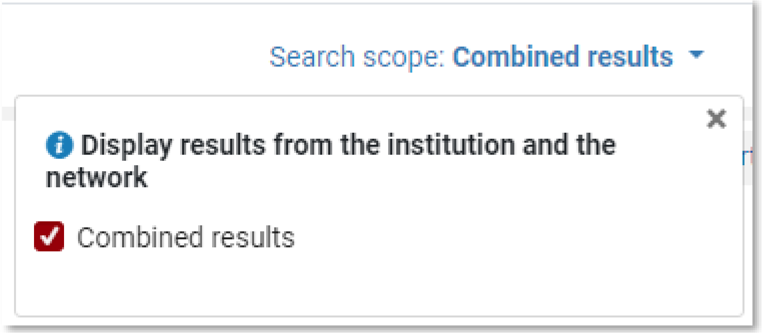
Available For

Training - Member 2 - Cl...

Training - Member 1 - Cl...

Repository Search

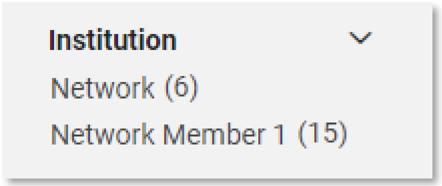
- Combined search results
  - Include Network Zone activations in your Institution Zone search results
  - Results indicate if the resource is from the Institution or Network
  - This functionality must be enabled by Ex Libris



Search scope: **Combined results**

Display results from the institution and the network

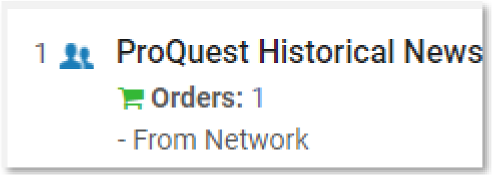
☑ Combined results



Institution

Network (6)

Network Member 1 (15)



1 ProQuest Historical News

Orders: 1

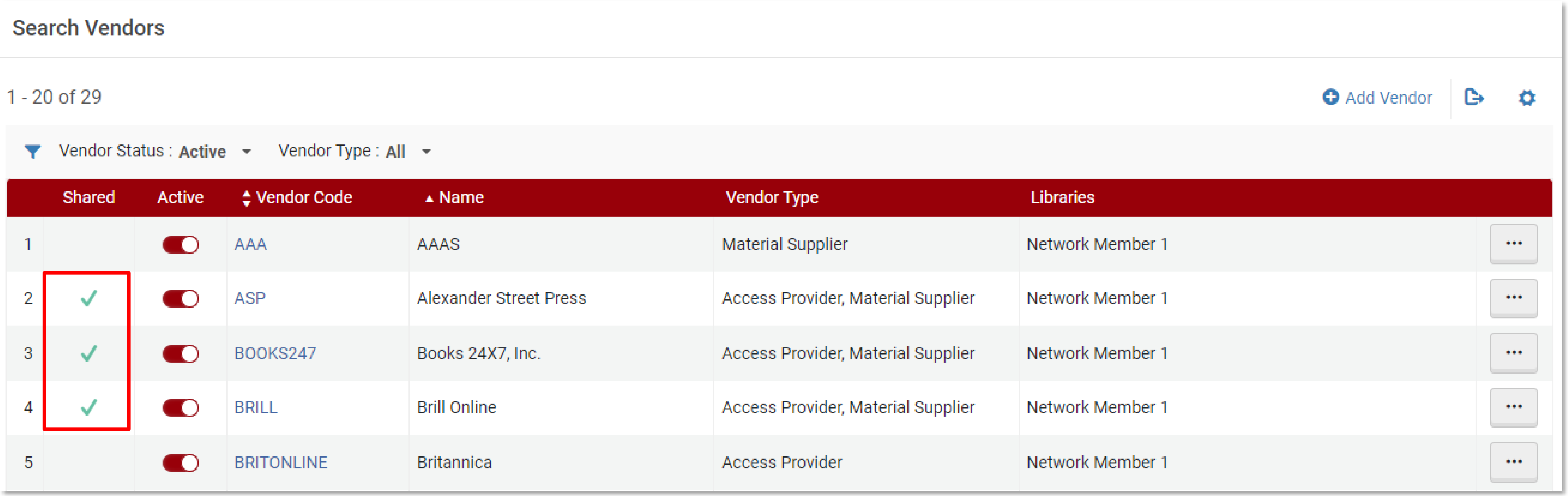
- From Network

https://knowledge.exlibrisgroup.com/Alma/Product_Documentation/010Alma_Online_Help_(English)/100Managing_Multiple_Institutions_Using_a_Network_Zone/03_Managing_Records_in_Consortia/065Combining_Institution_and_Network_Zone_Search_Results

Vendors and Licenses

Vendors

- Vendor records created in the Network are distributed to member institutions



Search Vendors

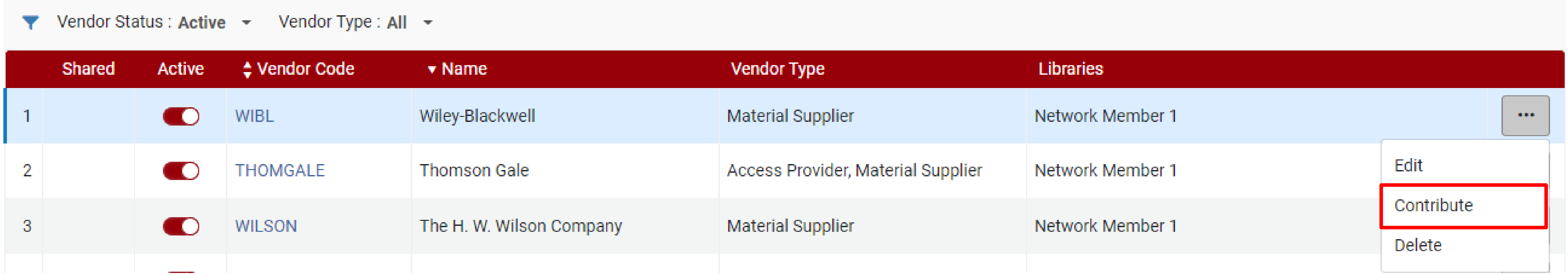
1 - 20 of 29

Vendor Status : **Active** Vendor Type : **All**

	Shared	Active	Vendor Code	Name	Vendor Type	Libraries	
1		●	AAA	AAAS	Material Supplier	Network Member 1	···
2	✓	●	ASP	Alexander Street Press	Access Provider, Material Supplier	Network Member 1	···
3	✓	●	BOOKS247	Books 24X7, Inc.	Access Provider, Material Supplier	Network Member 1	···
4	✓	●	BRILL	Brill Online	Access Provider, Material Supplier	Network Member 1	···
5		●	BRITONLINE	Britannica	Access Provider	Network Member 1	···

Vendors

- Individual institutions can contribute local vendors to the Network
- The vendor record will then be shared with other members

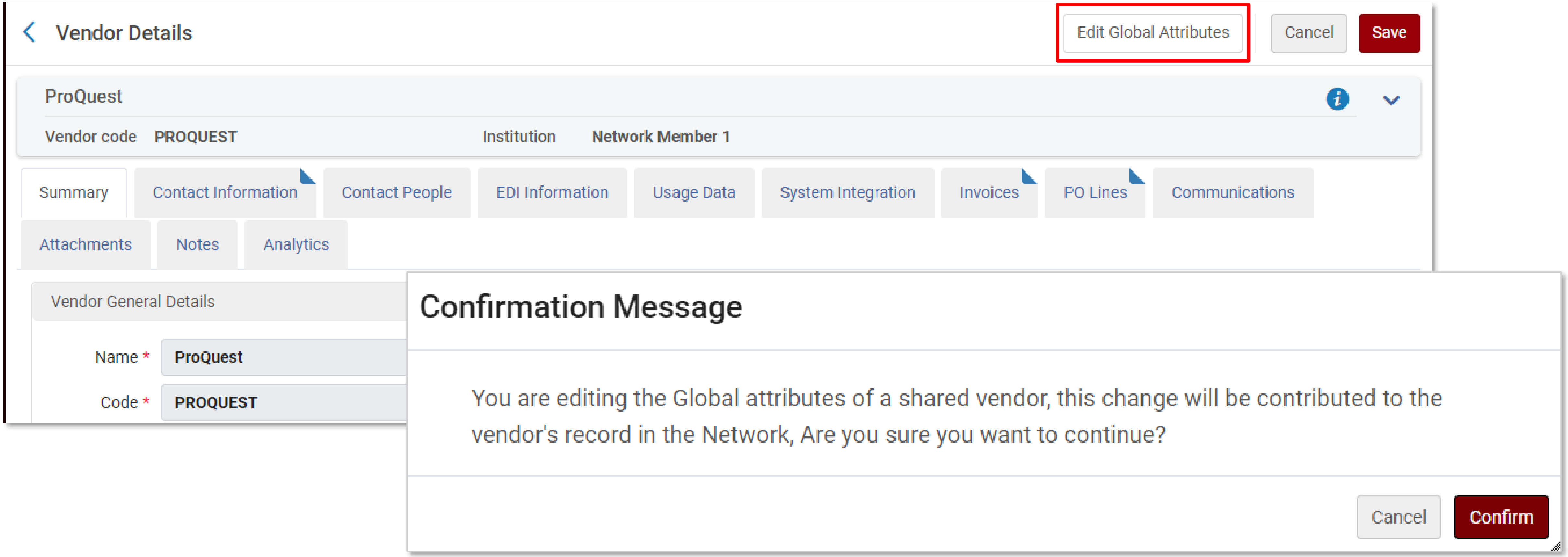


Vendor Status : Active
Vendor Type : All

	Shared	Active	Vendor Code	Name	Vendor Type	Libraries
1		●	WIBL	Wiley-Blackwell	Material Supplier	Network Member 1
2		●	THOMGALE	Thomson Gale	Access Provider, Material Supplier	Network Member 1
3		●	WILSON	The H. W. Wilson Company	Material Supplier	Network Member 1

Vendors

- Institutions can also update shared vendors to make corrections or add information to the Network vendor record


Edit Global Attributes
Cancel
Save
Summary
Contact Information
Contact People
EDI Information
Usage Data
System Integration
Invoices
PO Lines
Communications
Attachments
Notes
Analytics
Cancel
Confirm

Vendor Details

ProQuest

Vendor code PROQUEST

Institution Network Member 1

Vendor General Details

Name * ProQuest

Code * PROQUEST

Confirmation Message

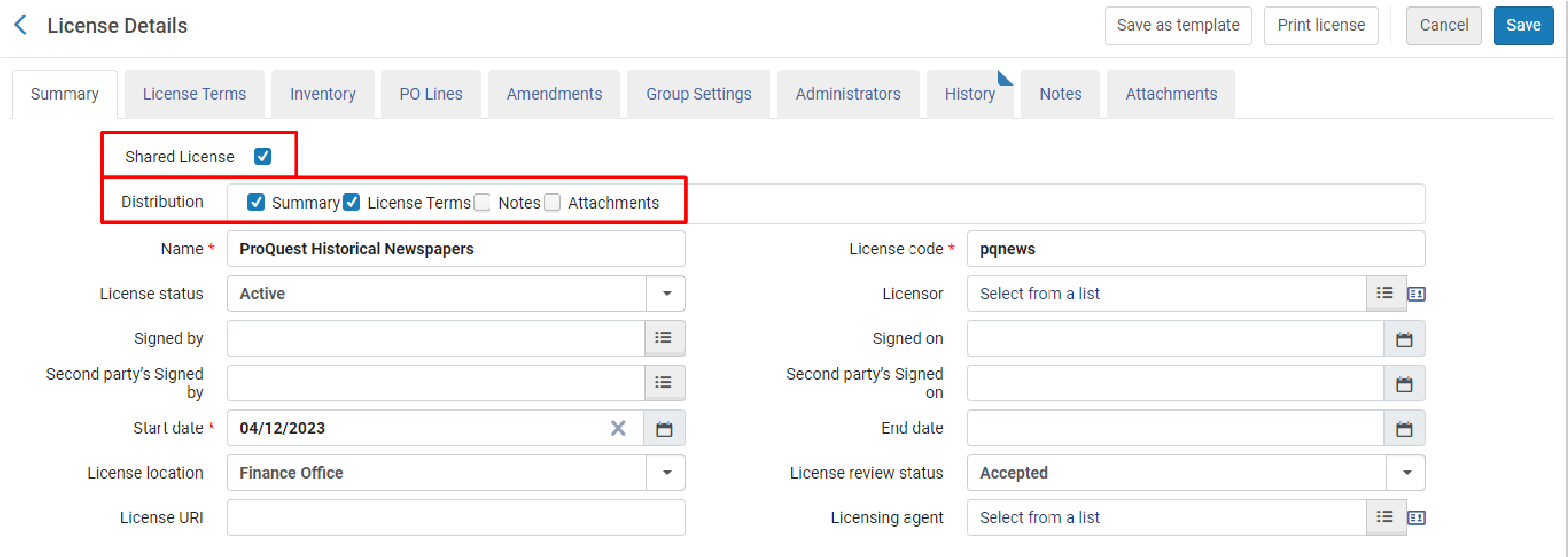
You are editing the Global attributes of a shared vendor, this change will be contributed to the vendor's record in the Network, Are you sure you want to continue?

Distributing Vendors

- Distribute network Acquisition changes to members job
  - Needs to be enabled:
  - Configuration > Acquisitions > General > Other Settings
  - Set **acq_distribution_job** to **true**
- Scheduled job runs daily
- Can be run manually by Network operators
  - Alma menu > Acquisitions > Advanced Tools > Distribute Acquisition Member Configuration

Licenses

- Licenses can be created in the Network and shared with member institutions


License Details
Save as template
Print license
Cancel
Save
Summary
License Terms
Inventory
PO Lines
Amendments
Group Settings
Administrators
History
Notes
Attachments

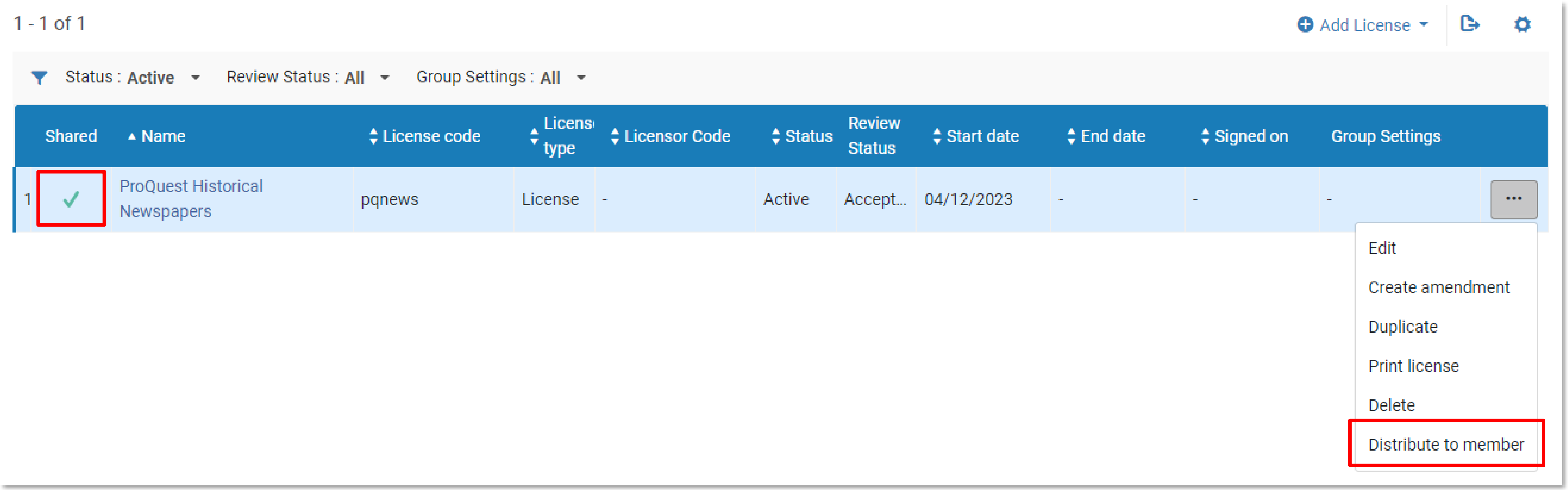
Shared License ☑

Distribution ☑ Summary ☑ License Terms ☐ Notes ☐ Attachments

Name *	ProQuest Historical Newspapers	License code *	pqnews
License status	Active	Licensor	Select from a list
Signed by		Signed on	
Second party's Signed by		Second party's Signed on	
Start date *	04/12/2023	End date	
License location	Finance Office	License review status	Accepted
License URI		Licensing agent	Select from a list

Licenses

- Distribution can be done manually as well as by the Distribute network Acquisition changes to members job


Add License
...
Edit
Create amendment
Duplicate
Print license
Delete
Distribute to member

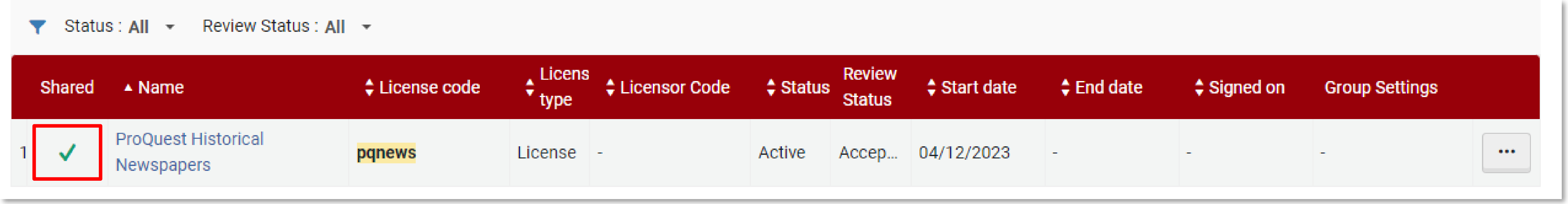
1 - 1 of 1

Status : **Active** Review Status : **All** Group Settings : **All**

	Shared	Name	License code	Licens type	Licensor Code	Status	Review Status	Start date	End date	Signed on	Group Settings
1	✓	ProQuest Historical Newspapers	pqnews	License	-	Active	Accept...	04/12/2023	-	-	-

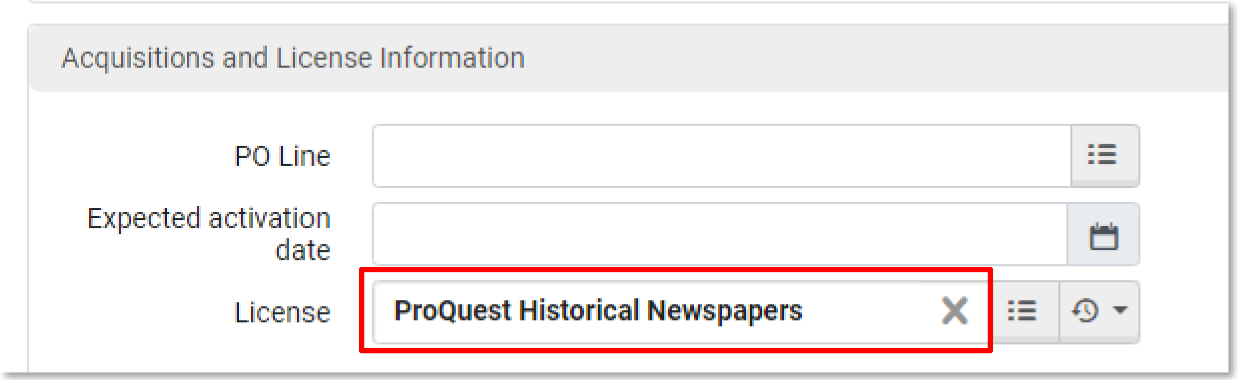
Licenses

- Institutions can attach e-inventory to the shared license
- License Terms can be displayed to patrons



Status : **All** Review Status : **All**

	Shared	Name	License code	License type	Licensor Code	Status	Review Status	Start date	End date	Signed on	Group Settings	
1	✓	ProQuest Historical Newspapers	**pqnews**	License	-	Active	Accep...	04/12/2023	-	-	-	···

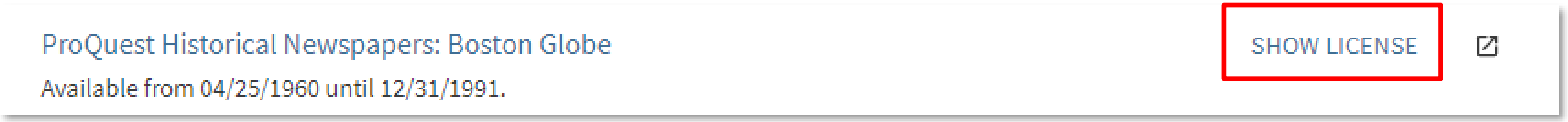


Acquisitions and License Information

PO Line:

Expected activation date:

License: **ProQuest Historical Newspapers**

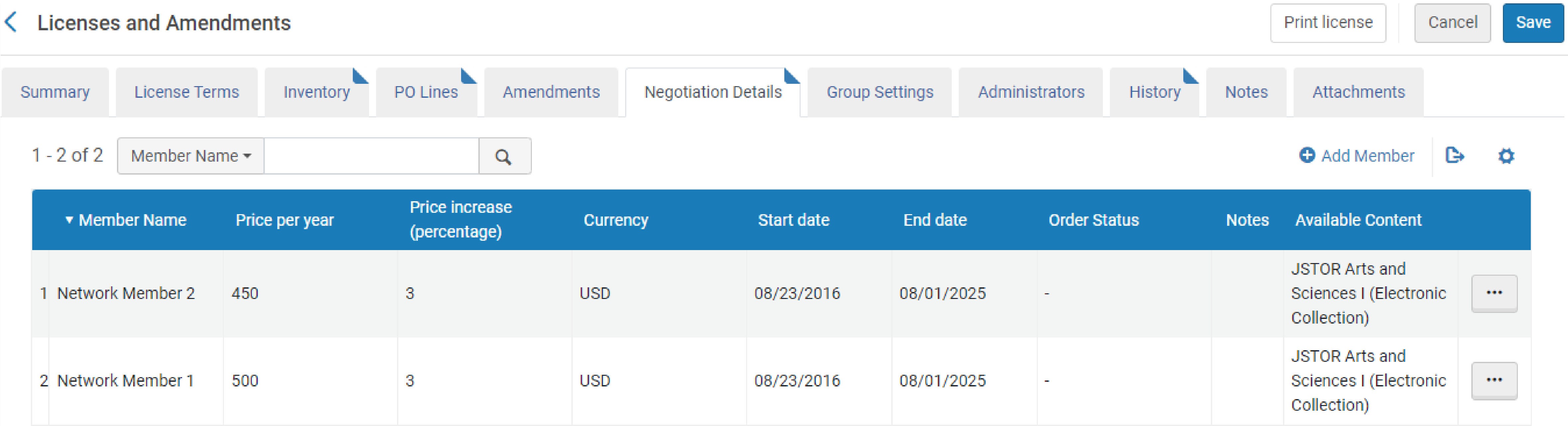


ProQuest Historical Newspapers: Boston Globe

Available from 04/25/1960 until 12/31/1991.

Negotiated License

- Centrally-managed license with specific purchasing information for members
- Institutions are attached to the license
- Available Network e-resources are defined per institution

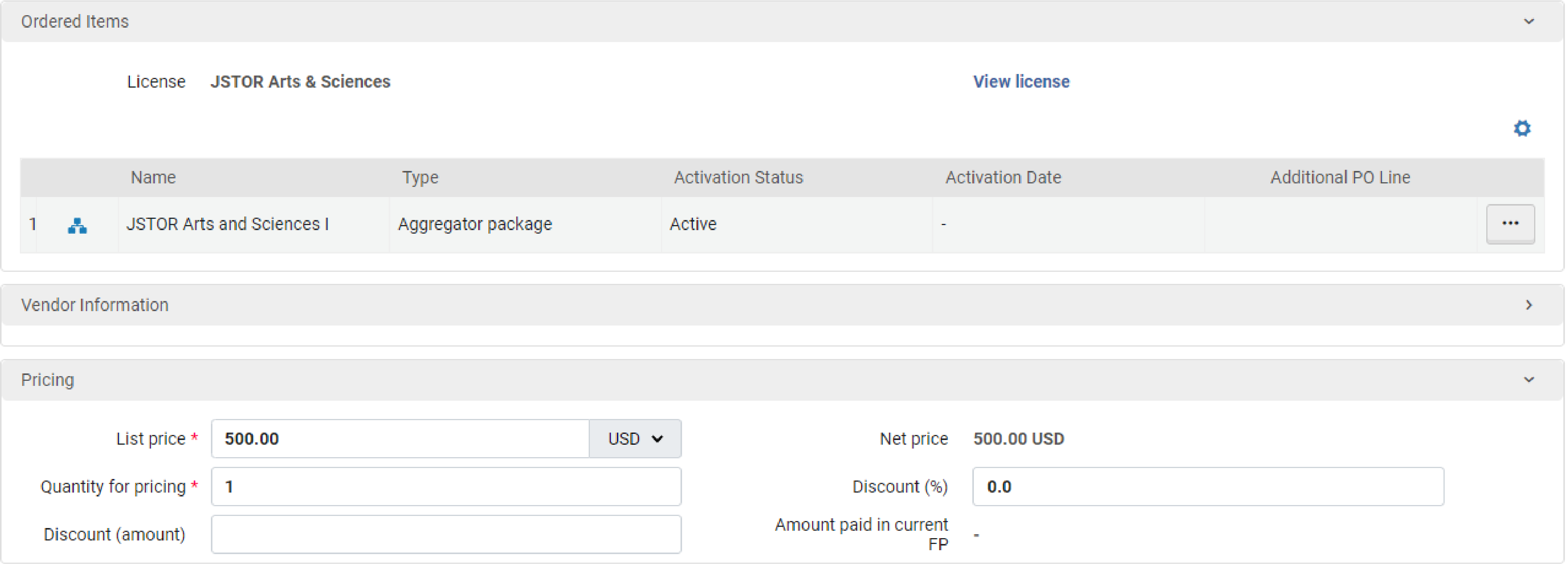

Licenses and Amendments
Print license
Cancel
Save
Summary
License Terms
Inventory
PO Lines
Amendments
Negotiation Details
Group Settings
Administrators
History
Notes
Attachments
Member Name
Add Member

1 - 2 of 2

	▾ Member Name	Price per year	Price increase (percentage)	Currency	Start date	End date	Order Status	Notes	Available Content	
1	Network Member 2	450	3	USD	08/23/2016	08/01/2025	-		JSTOR Arts and Sciences I (Electronic Collection)	···
2	Network Member 1	500	3	USD	08/23/2016	08/01/2025	-		JSTOR Arts and Sciences I (Electronic Collection)	···

Negotiated License

- Member institutions can create a PO Line from the Network Zone inventory
  - PO Line will use price and renewal information from the negotiated license



Ordered Items
Vendor Information
Pricing
View license
USD
...

License JSTOR Arts & Sciences

		Name	Type	Activation Status	Activation Date	Additional PO Line
1		JSTOR Arts and Sciences I	Aggregator package	Active	-	

List price * 500.00 USD

Quantity for pricing * 1

Discount (amount)

Net price 500.00 USD

Discount (%) 0.0

Amount paid in current FP -

EX LIBRIS
Knowledge Days

Network Analytics

ExLibris
Part of Clarivate

In the Network

- Analytics in the Network Zone environment includes data from all member institutions

In the Institution

- Institution Zone analytics includes the local institution data and NZ e-resources
- Institutions will **not** see local data from other member institutions
- Can access reports created in the Network

Configuration: Display NZ Information

Configuration > Analytics > Analytics Network Settings

- Network Zone
  - Set **analytics_network_inventory_available_for_members** to **true**
  - Row Actions > Manage in Network
  - Save and Distribute > Override member institution customization > Confirm

Configuration: Display NZ Information

Configuration > Analytics > Analytics Network Settings

- Institution Zone
  - Set **analytics_network_inventory_available_for_my_institution** to **true**

Configuration: Access NZ Reports

Configuration > Analytics > Analytics Network Settings

- Network Zone
  - Set **analytics_catalog_available_for_members** to **true**
  - Row Actions > Manage in Network
  - Save and Distribute > Override member institution customization > Confirm

Configuration: Access NZ Reports

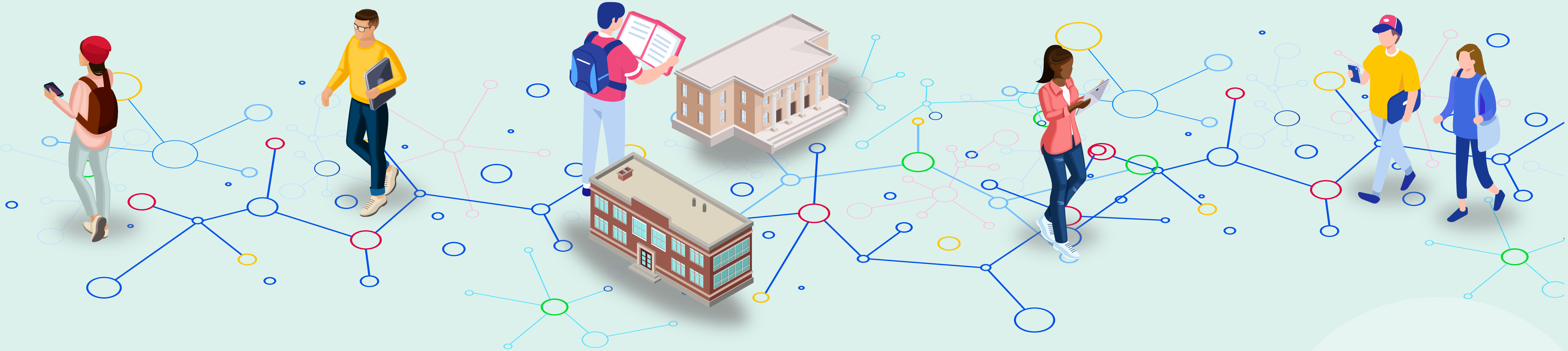
Configuration > Analytics > Analytics Network Settings

- Institution Zone
  - Set **analytics_catalog_available_for_my_institution** to **true**

E-Inventory Reporting

- Portfolio Details for Consortia dimension
  - Part of the E-Inventory Subject Area
- Includes local institution portfolios and those managed in the Network

https://knowledge.exlibrisgroup.com/Alma/Product_Documentation/010Alma_Online_Help_(English)/080Analytics/Alma_Analytics_Subject_Areas/E-Inventory#Portfolio_Details_for_Consortia_Members



Central Configurations

Introduction

- It is possible to manage configurations in the Network Zone and distribute the configurations to member Institutions
- This is especially useful for cases where a specific configuration is identical for all or most members
- Distributing configurations from the Network is more efficient than configuring each of the member institutions
- This can also ensure consistency in configurations across the consortium

Introduction

- Other elements that can be configured centrally:
    - Code and mapping tables
    - Fulfillment
    - Resource Sharing
    - GES and Display Logic
    - Letters
    - Import profiles
    - S/FTP connections
    - Integration profiles

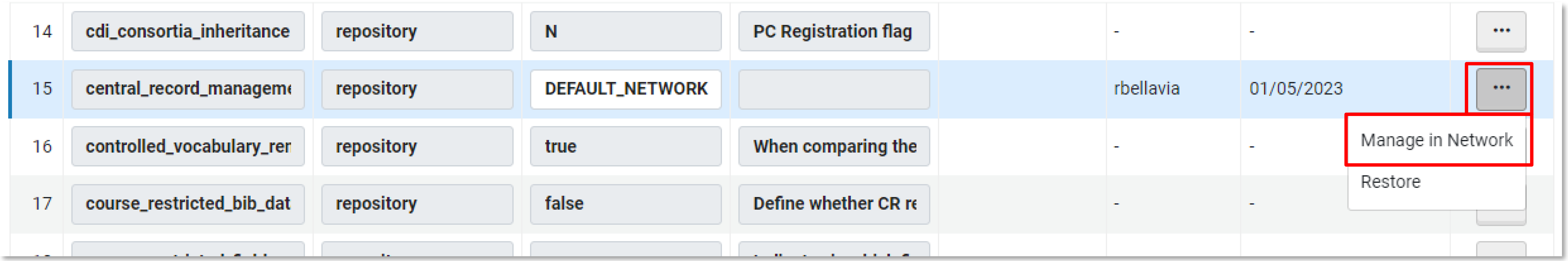
Managing Configuration Tables at the Row Level

- To centrally manage configuration tables configured at the row level:
  - In the Network Zone, select a configuration table that is configured at the row level
  - Select **Customize** from the row actions list and choose **Manage in Network**
  - Click **Save and Distribute**

Managing Configuration Tables at the Row Level

- Example: central_record_management parameter
  - Configuration > Resources > General > Other Settings

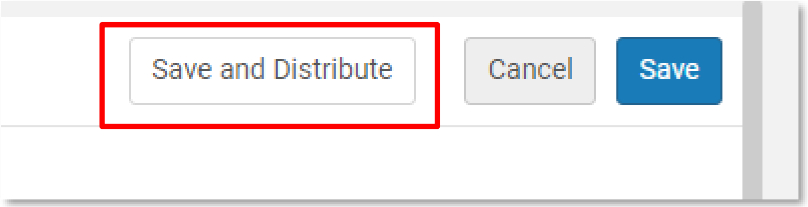
- Customize > Manage in Network



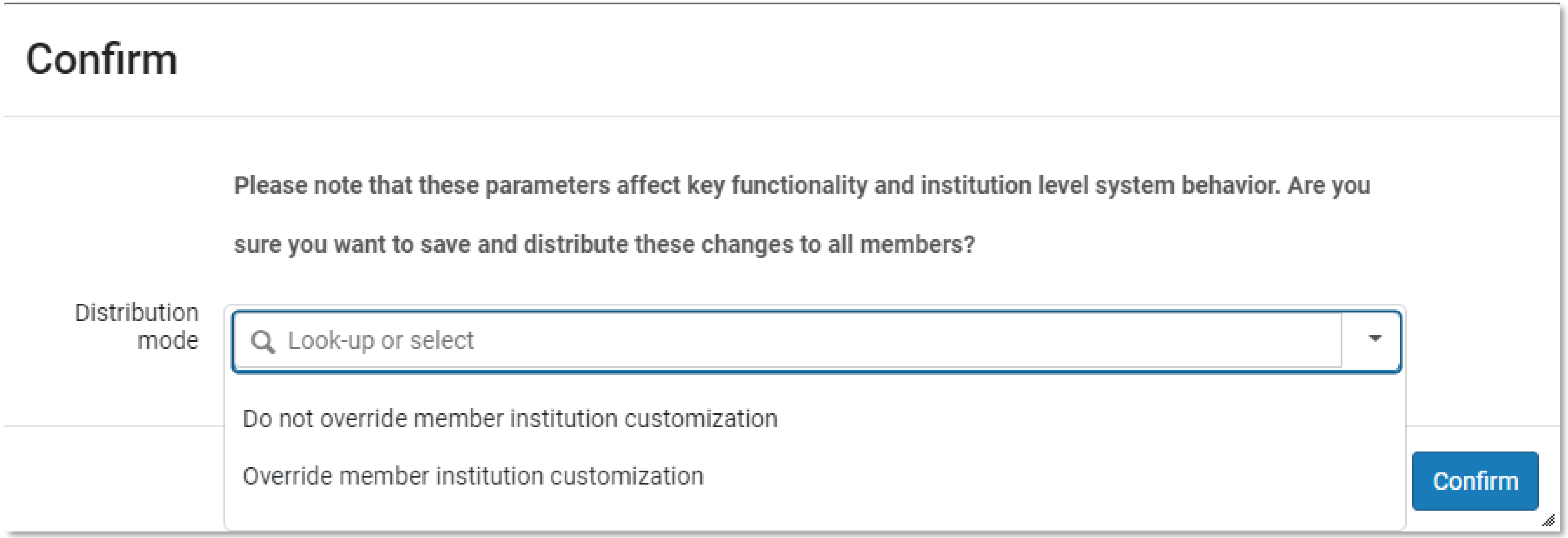
14	cdi_consortia_inheritance	repository	N	PC Registration flag	-	-	•••
15	central_record_manageme	repository	DEFAULT_NETWORK		rbellavia	01/05/2023	•••
16	controlled_vocabulary_rer	repository	true	When comparing the	-	-	
17	course_restricted_bib_dat	repository	false	Define whether CR re	-	-	

Managing Configuration Tables at the Row Level

- Save and Distribute



- Choose whether to override member institution customization



Confirm

Please note that these parameters affect key functionality and institution level system behavior. Are you sure you want to save and distribute these changes to all members?

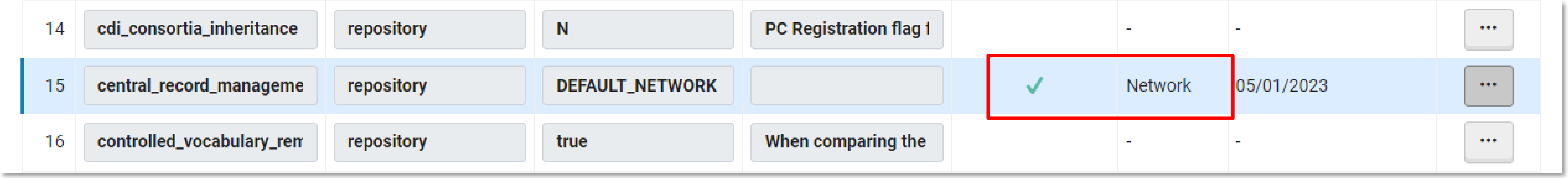
Distribution mode: Look-up or select

Do not override member institution customization

Override member institution customization

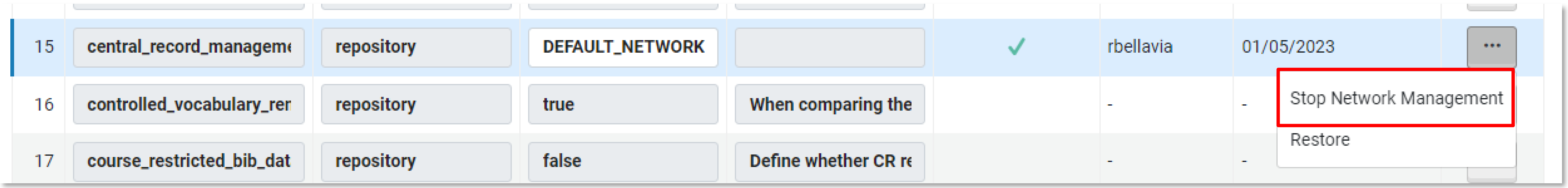
Managing Configuration Tables at the Row Level

- In the member Institution we now see that this parameter is managed by the Network



14	cdi_consortia_inheritance	repository	N	PC Registration flag		-	-	···
15	central_record_manageme	repository	DEFAULT_NETWORK		✓	Network	05/01/2023	···
16	controlled_vocabulary_re	repository	true	When comparing the		-	-	···

- To stop centralized management of the row, choose Stop Network Management and again Save and Distribute



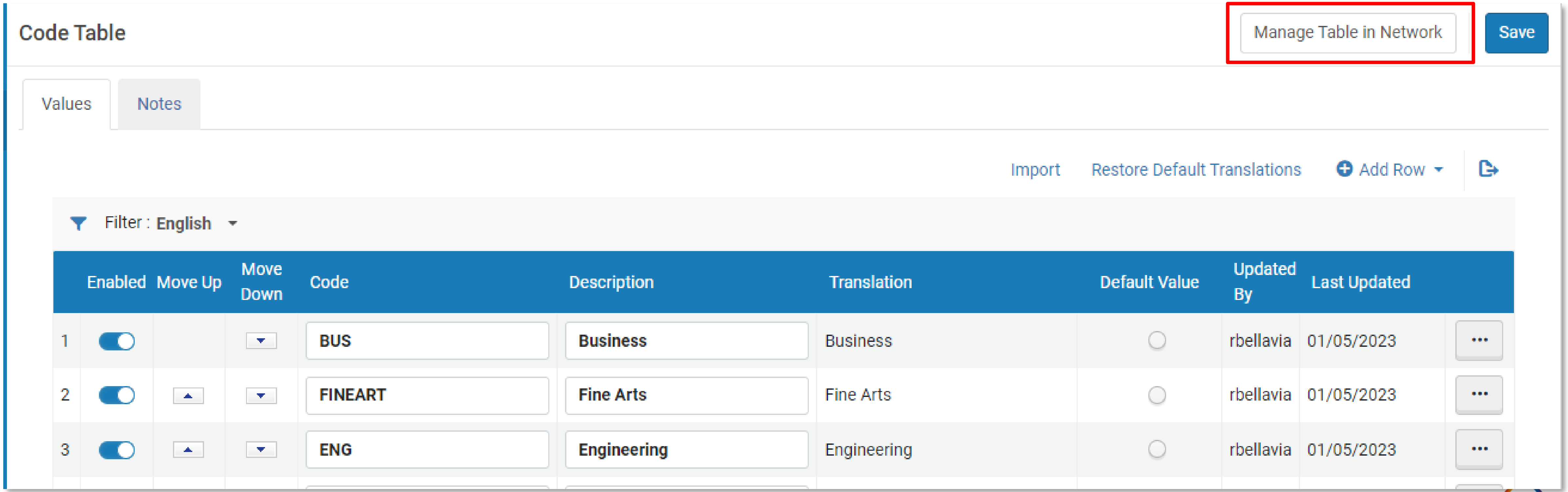
15	central_record_managem	repository	DEFAULT_NETWORK		✓	rbellavia	01/05/2023	···
16	controlled_vocabulary_re	repository	true	When comparing the		-	-	
17	course_restricted_bib_dat	repository	false	Define whether CR re		-	-	

Managing Configuration Tables at the Table Level

- To centrally manage configuration tables configured at the table level:
    - In the Network Zone, select a configuration table that is configured at the table level
    - Click **Manage in Network** at the top
    - Configure the table as desired
    - Click **Save and Distribute**

Managing Configuration Tables at the Table Level

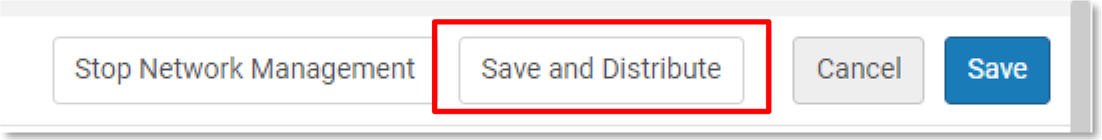
- Example: 1st Reporting Codes
  - Configuration > Acquisitions > Purchase Orders > 1st Reporting Codes
- Click **Manage Table in Network** and customize rows


Code Table
Manage Table in Network
Save
Values
Notes
Import
Restore Default Translations
Add Row
Filter : English

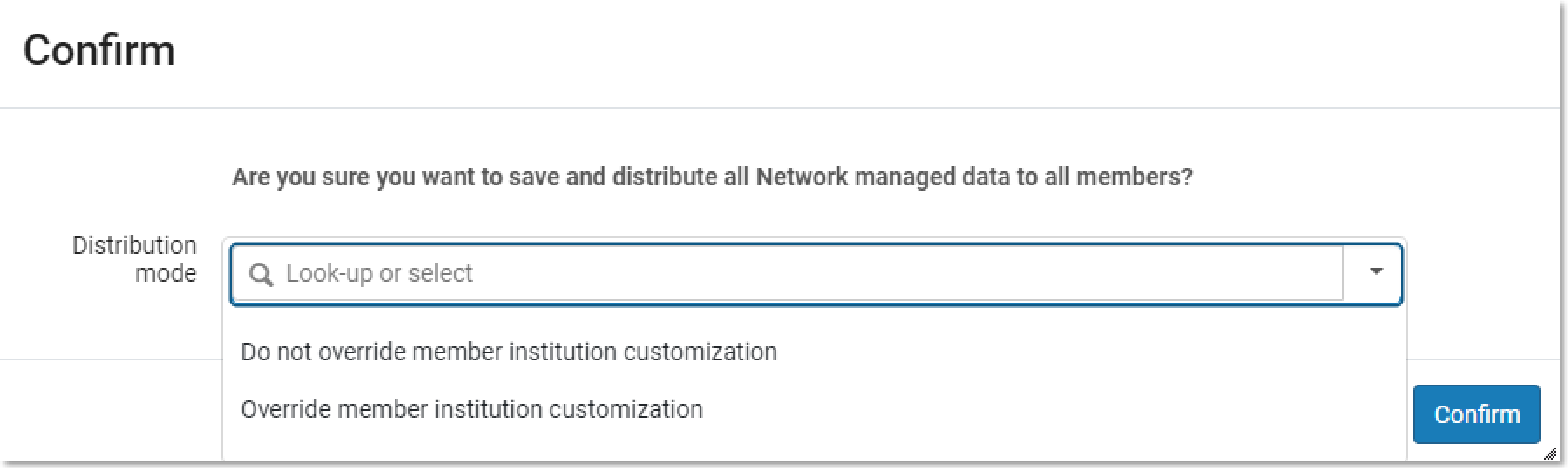
	Enabled	Move Up	Move Down	Code	Description	Translation	Default Value	Updated By	Last Updated	
1	●		▼	BUS	Business	Business	○	rbellavia	01/05/2023	···
2	●	▲	▼	FINEART	Fine Arts	Fine Arts	○	rbellavia	01/05/2023	···
3	●	▲	▼	ENG	Engineering	Engineering	○	rbellavia	01/05/2023	···

Managing Configuration Tables at the Table Level

- Save and Distribute


Stop Network Management
Save and Distribute
Cancel
Save

- Choose whether to override member institution customization



Confirm

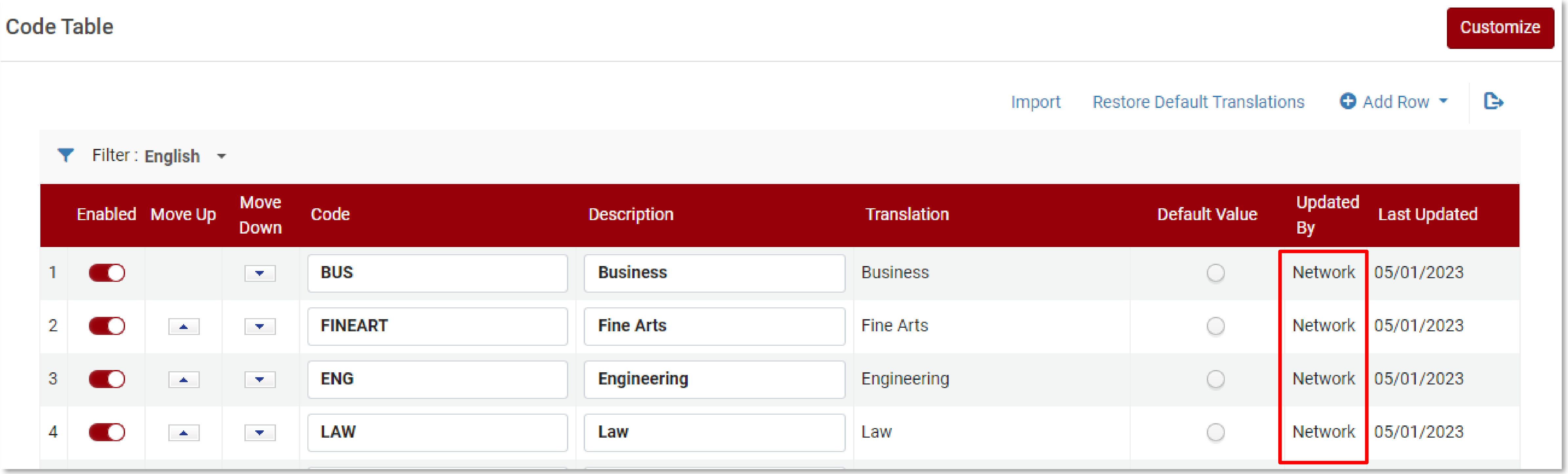
Are you sure you want to save and distribute all Network managed data to all members?

Distribution mode: Look-up or select

Do not override member institution customization
Override member institution customization
Confirm

Managing Configuration Tables at the Table Level

- In the member institution we now see that the table has been updated by the Network



Code Table

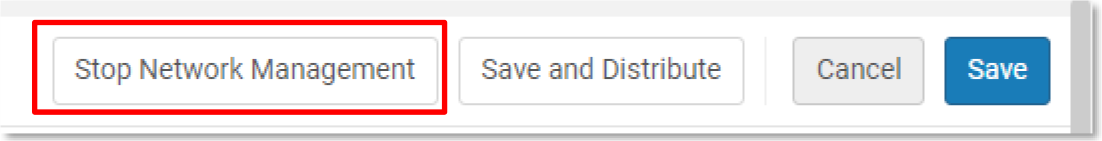
Customize
Import
Restore Default Translations
Add Row

Filter : English

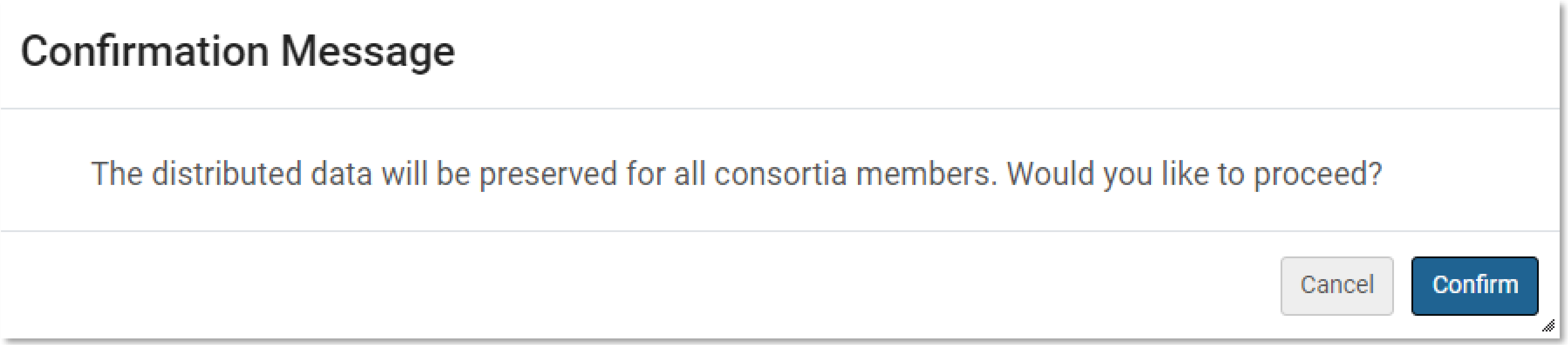
	Enabled	Move Up	Move Down	Code	Description	Translation	Default Value	Updated By	Last Updated
1	●		▾	BUS	Business	Business	○	Network	05/01/2023
2	●	▴	▾	FINEART	Fine Arts	Fine Arts	○	Network	05/01/2023
3	●	▴	▾	ENG	Engineering	Engineering	○	Network	05/01/2023
4	●	▴	▾	LAW	Law	Law	○	Network	05/01/2023

Managing Configuration Tables at the Table Level

- To stop centralized management of the table, choose Stop Network Management


Stop Network Management
Save and Distribute
Cancel
Save

- The distributed data will remain in the member institutions, and they will be able to customize or add new values



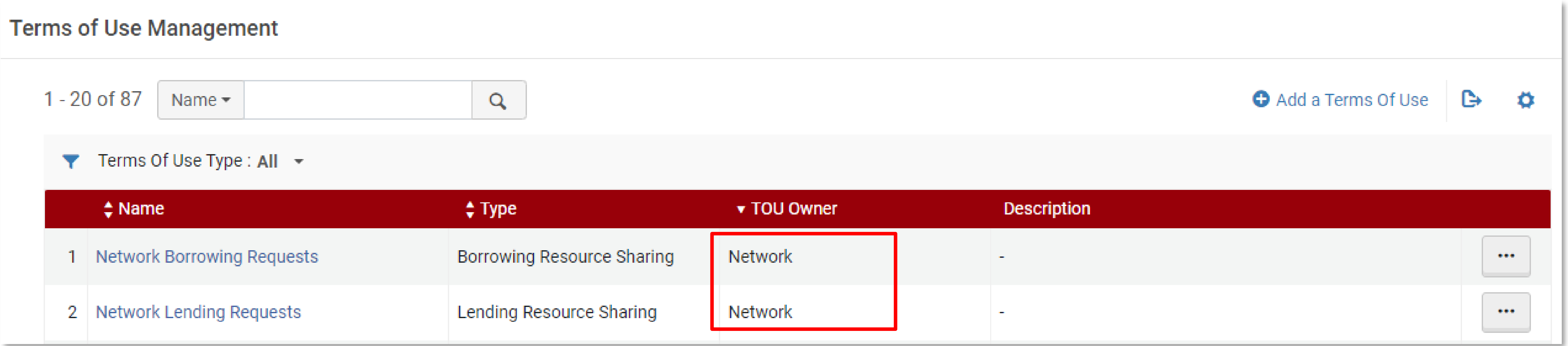
Confirmation Message

The distributed data will be preserved for all consortia members. Would you like to proceed?

Cancel
Confirm

Network Zone Terms of Use

- It is possible to create Fulfillment Terms of Use in the Network Zone
- These Terms of Use will be distributed to member institutions
- This can be useful if, for example, you have consistent borrowing and lending policies for Resource Sharing across the Network

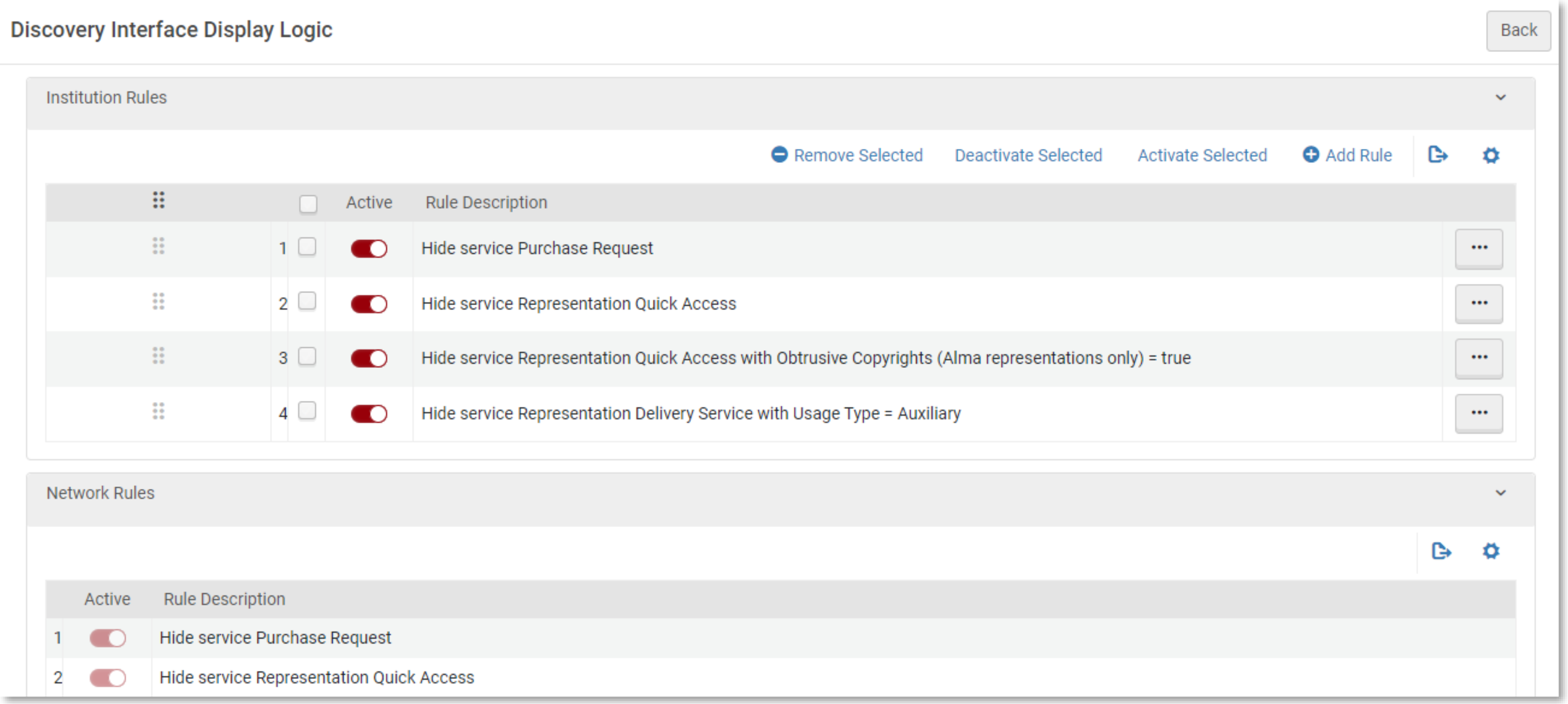


Terms of Use Management

	Name	Type	TOU Owner	Description
1	Network Borrowing Requests	Borrowing Resource Sharing	Network	-
2	Network Lending Requests	Lending Resource Sharing	Network	-

Discovery Interface Display Logic Rules

- Display Logic Rules configured in the Network appear for members
- The **network_display_logic_rules_precedence** parameter determines whether the NZ or IZ rules are checked first
  - Configuration > Fulfillment > General > Other Settings



Discovery Interface Display Logic

Institution Rules

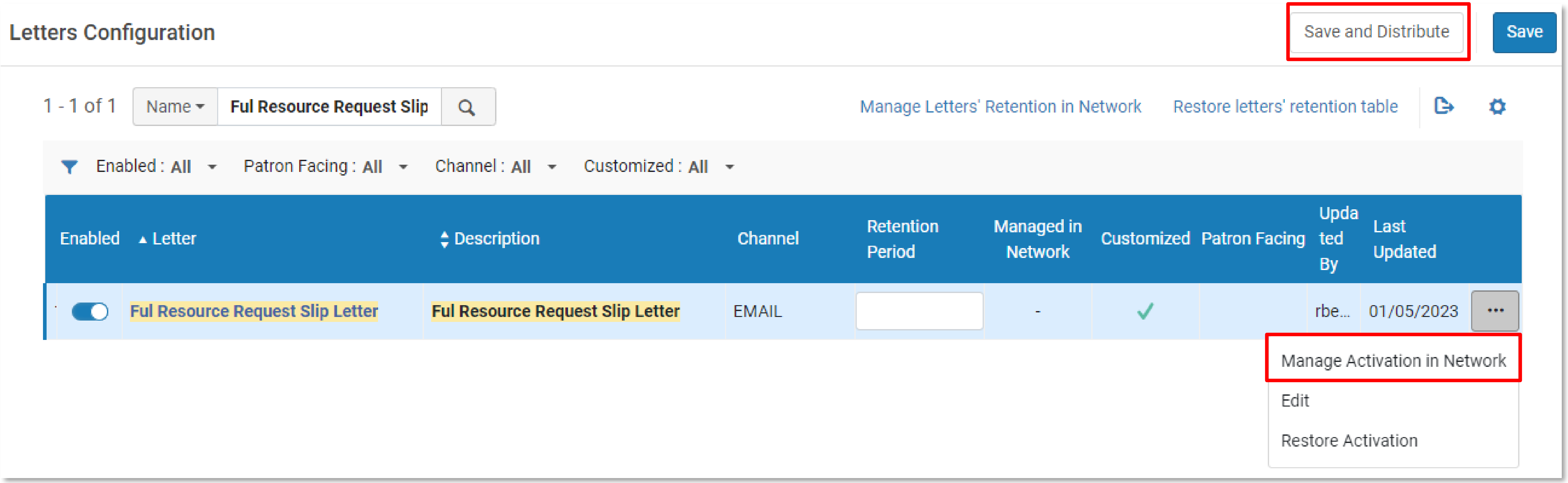
	☐	Active	Rule Description
1	☐	●	Hide service Purchase Request
2	☐	●	Hide service Representation Quick Access
3	☐	●	Hide service Representation Quick Access with Obtrusive Copyrights (Alma representations only) = true
4	☐	●	Hide service Representation Delivery Service with Usage Type = Auxiliary

Network Rules

	Active	Rule Description
1	●	Hide service Purchase Request
2	●	Hide service Representation Quick Access

Network Letter Configuration

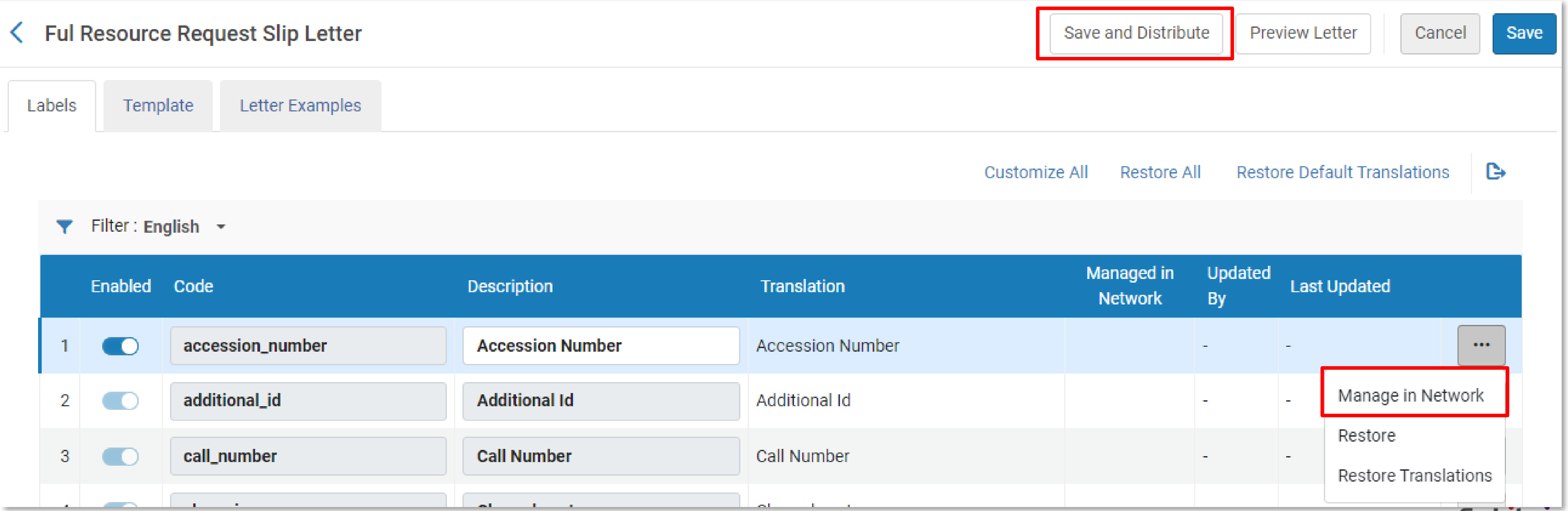
- Letter activation can be configured in the Network
  - Row Actions > Manage Activation in Network
  - Save and Distribute


Letters Configuration
Save and Distribute
Save
1 - 1 of 1
Name
Ful Resource Request Slip
Manage Letters' Retention in Network
Restore letters' retention table
Enabled : All
Patron Facing : All
Channel : All
Customized : All
Manage Activation in Network
Edit
Restore Activation

Enabled	Letter	Description	Channel	Retention Period	Managed in Network	Customized	Patron Facing	Updated By	Last Updated
●	Ful Resource Request Slip Letter	Ful Resource Request Slip Letter	EMAIL		-	✓		rbe...	01/05/2023

Network Letter Configuration

- Configure Labels in the Network
  - Row Actions > Customize > Manage in Network
  - Save and Distribute



Ful Resource Request Slip Letter

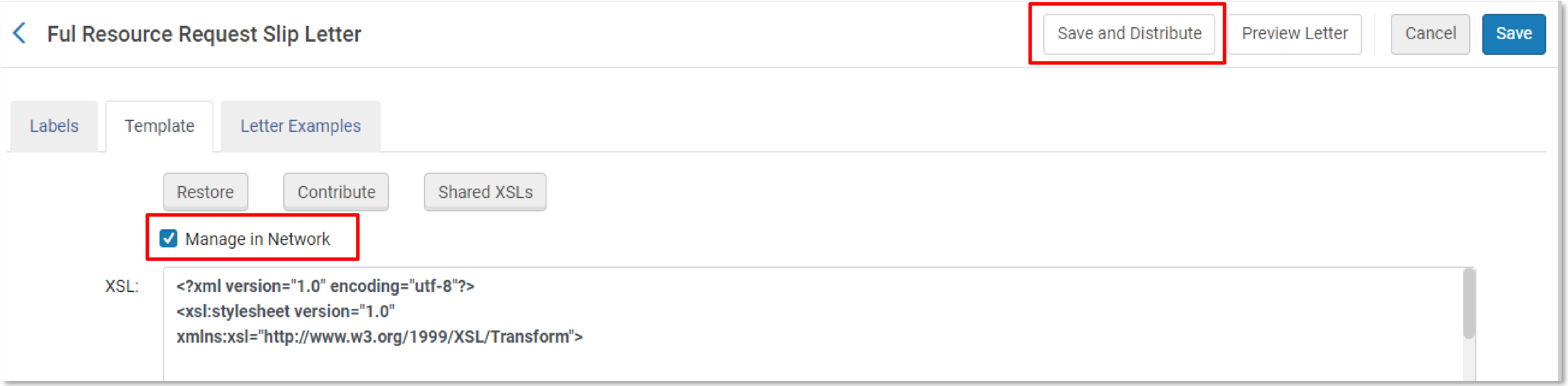
Save and Distribute
Preview Letter
Cancel
Save
Labels
Template
Letter Examples
Customize All
Restore All
Restore Default Translations
Manage in Network
Restore
Restore Translations

Filter : English

	Enabled	Code	Description	Translation	Managed in Network	Updated By	Last Updated
1	●	accession_number	Accession Number	Accession Number		-	-
2	●	additional_id	Additional Id	Additional Id		-	-
3	●	call_number	Call Number	Call Number		-	-

Network Letter Configuration

- It is also possible to centrally manage letter Templates
  - Check **Manage in Network**
  - Customize the XSL template
  - Click Save and Distribute


Ful Resource Request Slip Letter
Save and Distribute
Preview Letter
Cancel
Save
Labels
Template
Letter Examples
Restore
Contribute
Shared XSLs

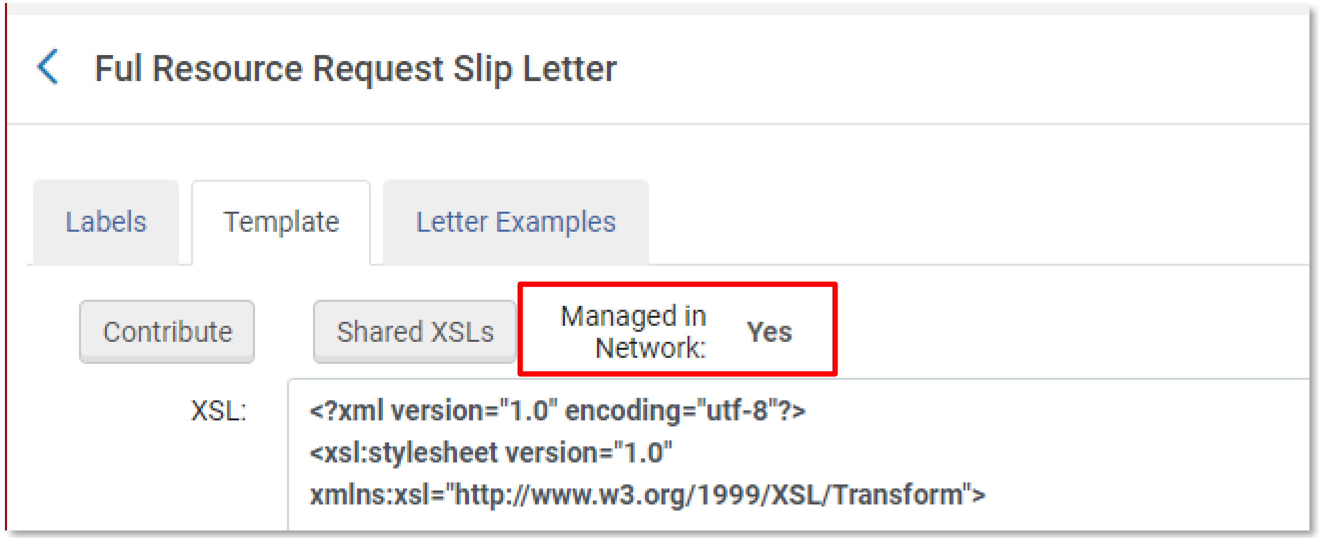
☑ Manage in Network

XSL:

```
<?xml version="1.0" encoding="utf-8"?>
<xsl:stylesheet version="1.0"
xmlns:xsl="http://www.w3.org/1999/XSL/Transform">
```

Network Letter Configuration

- Member Institutions will see the updated values and an indication that they are Managed in Network



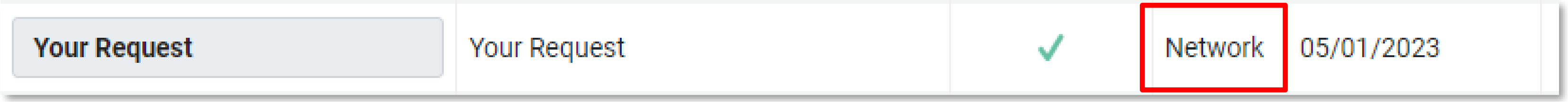
Ful Resource Request Slip Letter

Labels
Template
Letter Examples
Contribute
Shared XSLs

Managed in Network: **Yes**

XSL:

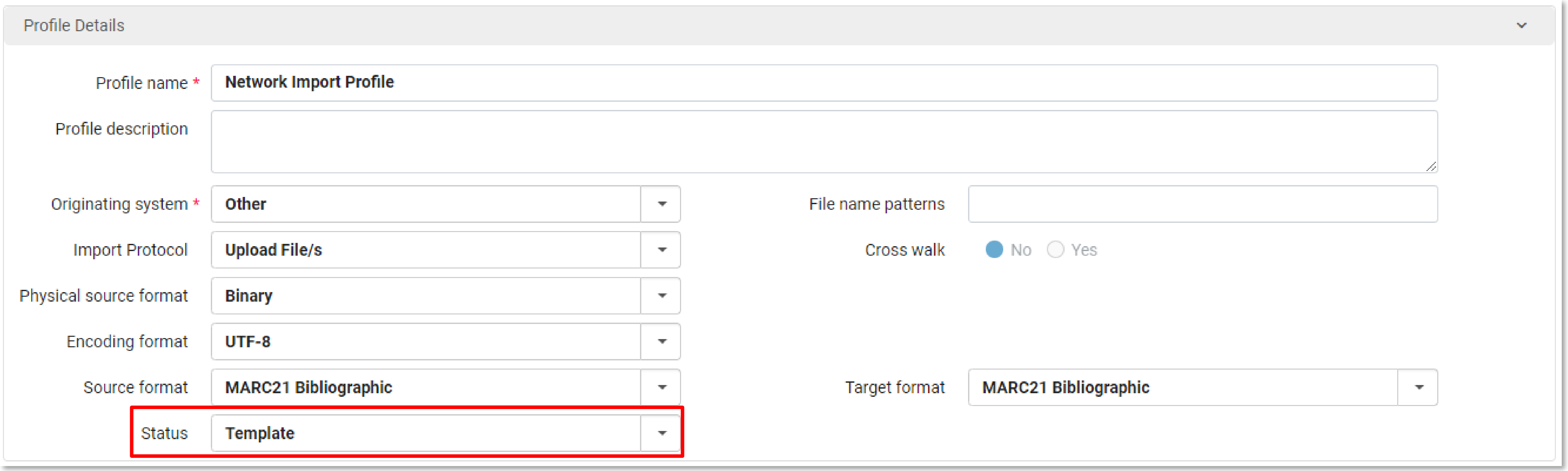
```
<?xml version="1.0" encoding="utf-8"?>
<xsl:stylesheet version="1.0"
xmlns:xsl="http://www.w3.org/1999/XSL/Transform">
```



Your Request	Your Request	✓	Network	05/01/2023

Import Profiles

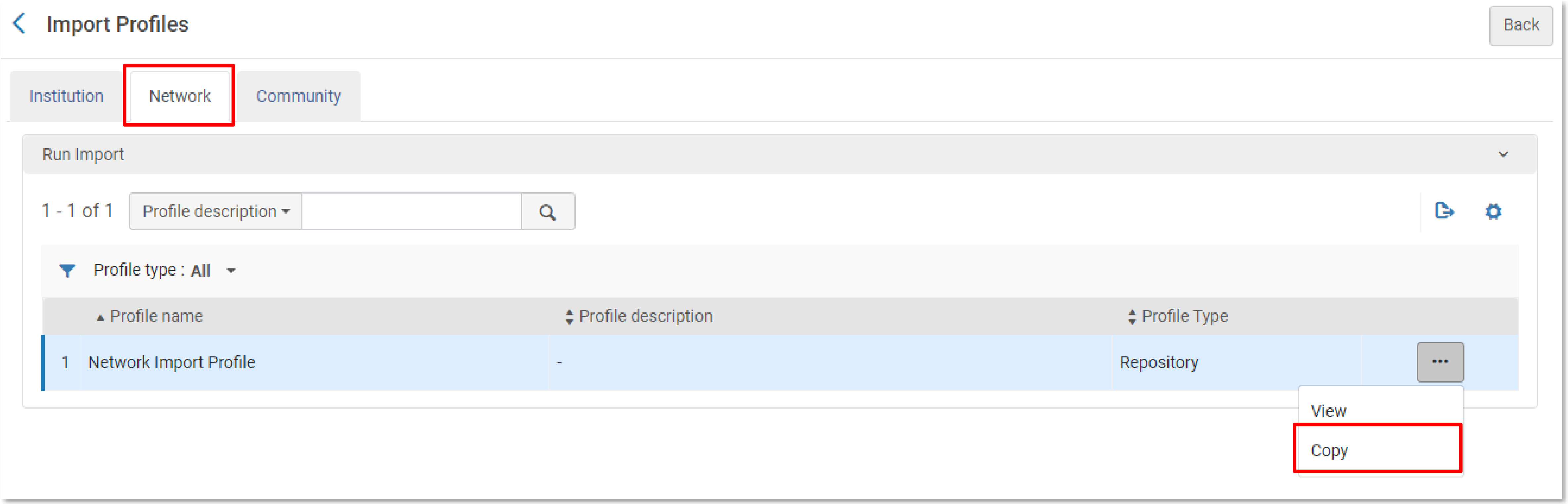
- The Network can define an import profile as a Template



Profile name *	Network Import Profile		
Profile description			
Originating system *	Other	File name patterns	
Import Protocol	Upload File/s	Cross walk	● No ○ Yes
Physical source format	Binary		
Encoding format	UTF-8		
Source format	MARC21 Bibliographic	Target format	MARC21 Bibliographic
Status	Template		

Import Profiles

- Members can view import profiles on the Network tab and copy them to run in their institution



Import Profiles
Back
Institution
Network
Community
Run Import
1 - 1 of 1
Profile description
Profile type : All

	Profile name	Profile description	Profile Type
1	Network Import Profile	-	Repository

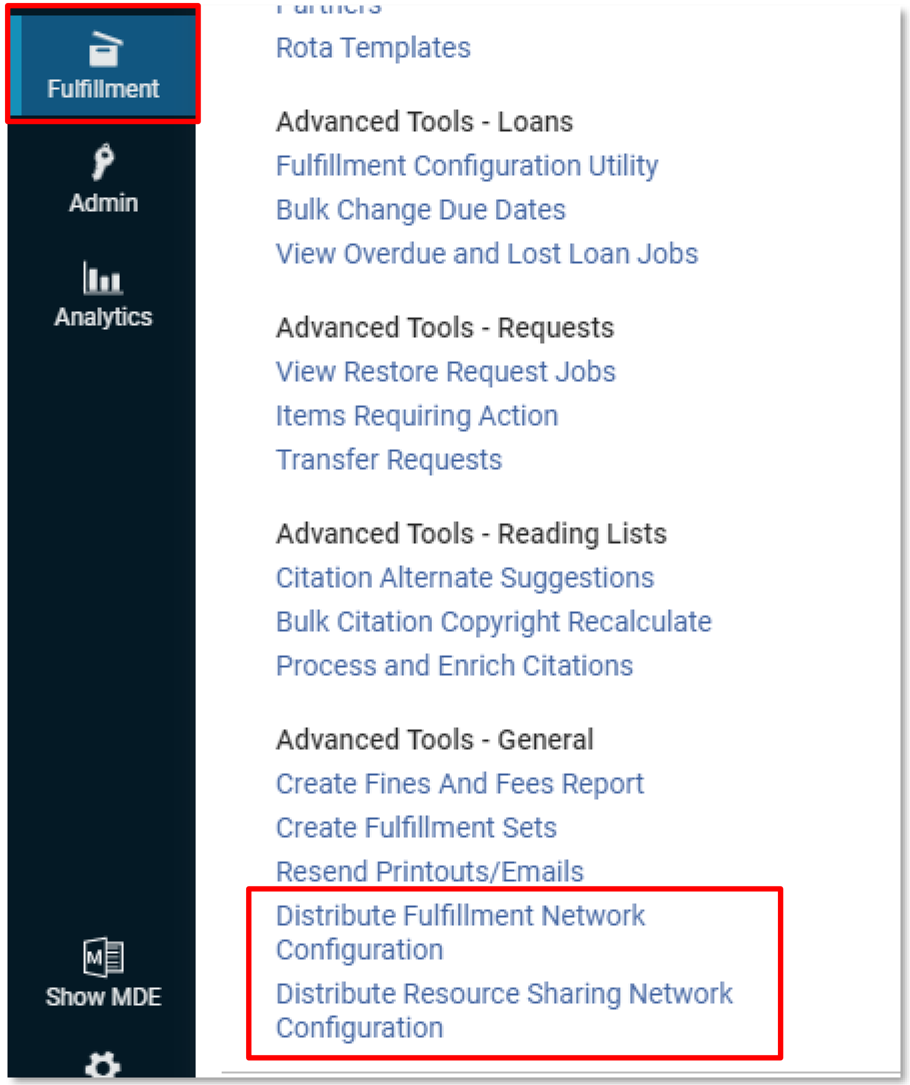
View
Copy

Distribution Jobs

- Network configuration changes are distributed to member institutions by jobs
- Some jobs run when the configuration changes are made (e.g., configuration tables, letters configuration)
- Other jobs can run on a scheduled basis
  - Acquisition changes
  - Fulfillment changes
  - Resource Sharing configuration
  - User Management changes

Distribution Jobs

- Distribution jobs can also be run from the relevant Alma menu
- Examples:
  - Distribute Fulfillment Network Configuration
  - Distribute Resource Sharing Network Configuration



Rota Templates

Advanced Tools - Loans
Fulfillment Configuration Utility
Bulk Change Due Dates
View Overdue and Lost Loan Jobs

Advanced Tools - Requests
View Restore Request Jobs
Items Requiring Action
Transfer Requests

Advanced Tools - Reading Lists
Citation Alternate Suggestions
Bulk Citation Copyright Recalculate
Process and Enrich Citations

Advanced Tools - General
Create Fines And Fees Report
Create Fulfillment Sets
Resend Printouts/Emails
Distribute Fulfillment Network Configuration
Distribute Resource Sharing Network Configuration

Distribution Jobs

- By default, local member institution changes are not overwritten by the Network Zone
- When the Network distribution job runs, the centrally managed data will not be distributed to that member institution
- If the member institution selects **Restore**, the relevant configuration can then be updated by the Network

Conclusion

Additional Resources

- Network Zone Documentation

https://knowledge.exlibrisgroup.com/Alma/Product_Documentation/010Alma_Online_Help_(English)/100Managing_Multiple_Institutions_Using_a_Network_Zone

- Network FAQs

https://knowledge.exlibrisgroup.com/Alma/Product_Materials/050Alma_FAQs/Collaborative_Networks

Questions?

Thank you!

Please fill out the survey as you leave the room

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