Alma Consortia Management and Administration

Erez Shabo | May 2023
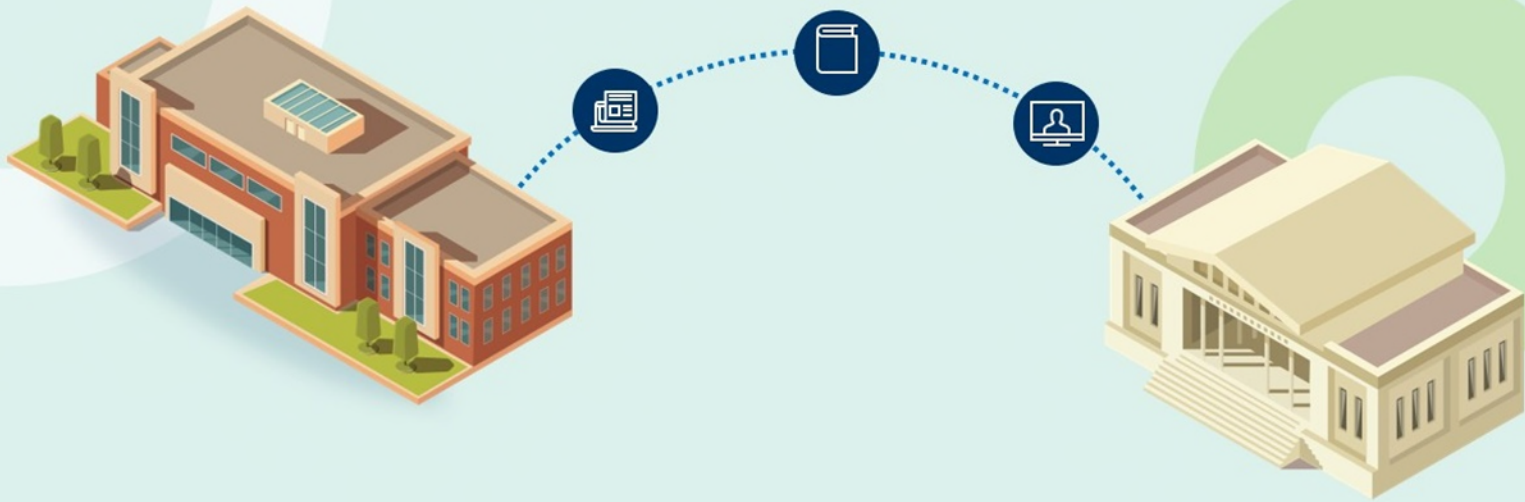
Agenda

- Types of Collaborative Networks

- Consortia Central Office Benefits

- New Features

- Central Office Enhancement Plans

How do we make the whole greater than the sum of its parts?

Types of Collaborative Networks

Collaboration for Patron Services

- Shared Discovery (Primo VE)
- Resource Sharing
- Fulfillment

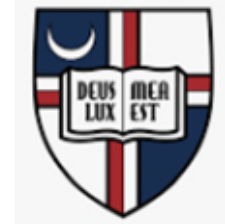## Collaboration for Technical Services

- Shared Catalog
- Joint Acquisitions
- Analytics
- Administration

ExLibris
Part of **Clarivate**

Collaboration for Patron Services

Collaboration for Technical Services

Network Zone

CATALOGING

Shared Catalog

ACQUISITIONS
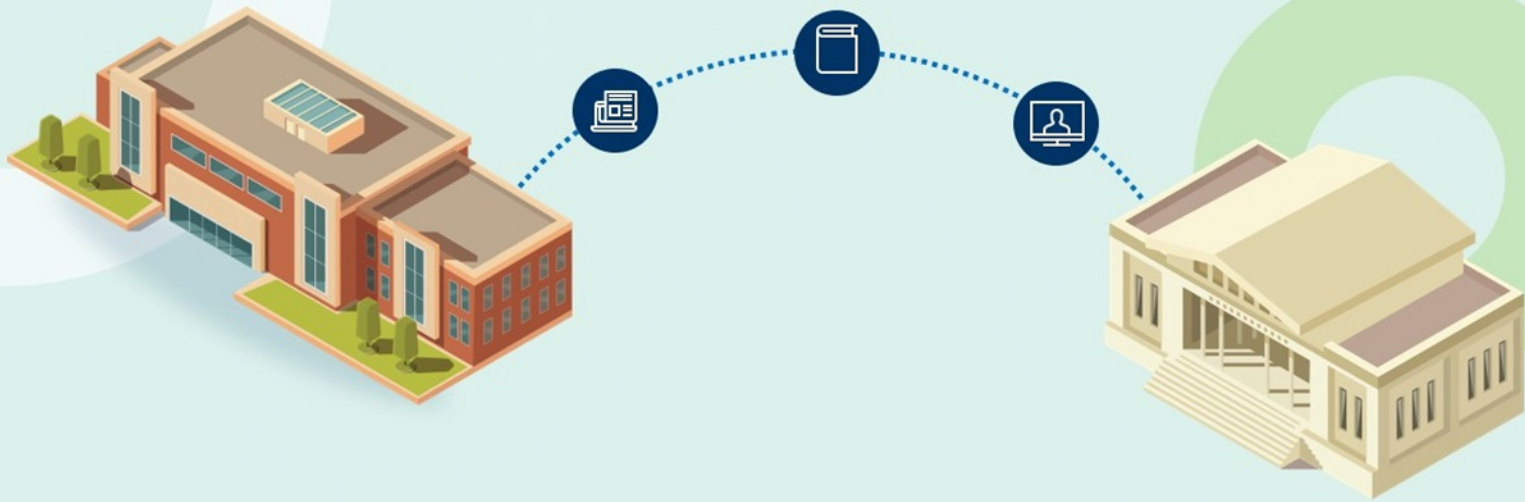
Joint Acquisitions and Negotiations

ANALYTICS

Shared Reporting and Analysis

**ADMINISTRATION**

Central Administration, Configuration

How is the Network Zone managed?
What is a Central Office?

Consortia Central Office Benefits

- Capacity and expertise of system librarians to take full advantage of Alma

- Unified configuration

- Centralized decision making

- Distributing unified workflow for all institutions

- Unified user experience

- Consortia-level top-down initiatives
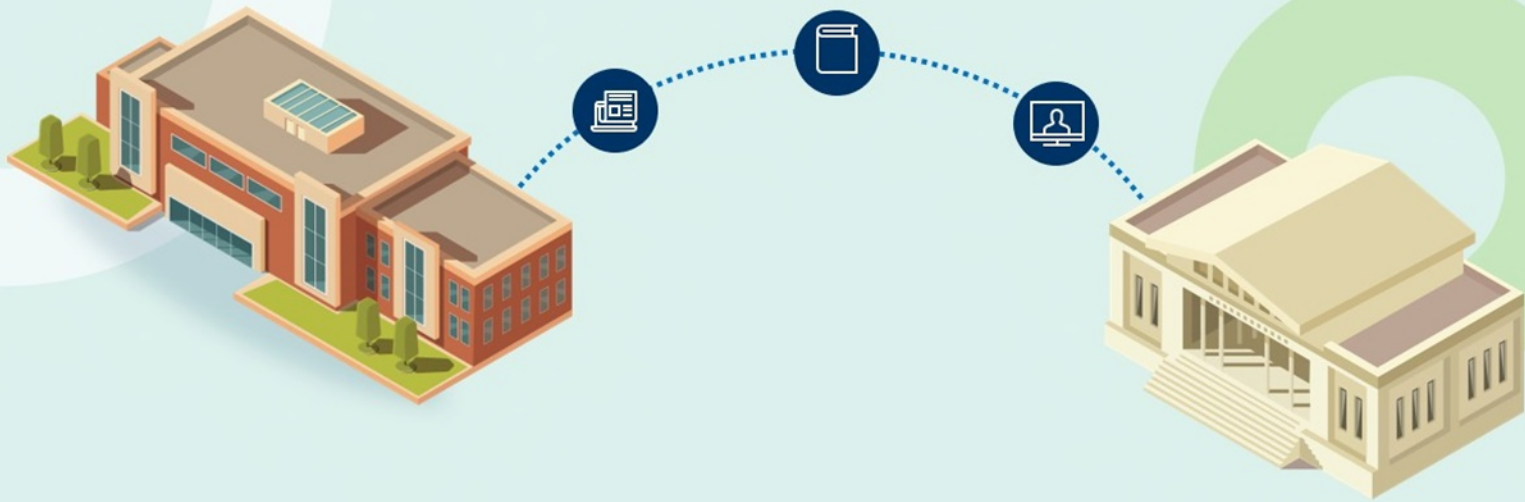
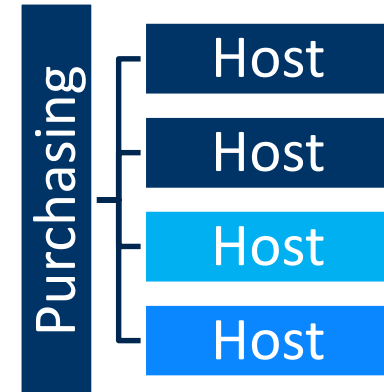Which new features enhance the consortia experience?

Joint Inventory Use

- Central office is authorized to manage joint
  - Negotiation
  - Acquisition
  - Inventory creation
  - Sharing (item data)
- Alma supports a streamlined inventory workflow: Joint Inventory Use

Joint Inventory Use – Terminology

- Purchasing Library
  - PO line owner that creates, manages, and sends the PO line
- Host Library
  - Located in other institution is expected to house and operate the received item

Joint Inventory Use – New Physical Location Configuration

Restrict Editing of Network Zone Metadata Fields

CATALOGING

Central Office can protect the Network Zone records

- Restrict editing of 035 fields

- Prevent editing of 6XX fields of certain vocabularies

- Prevent adding local fields (X9X,9XX,69X)

- And more …

Restrict Editing of NZ Metadata Fields – New Configuration

- Protect fields from editing or deletion

- Prevent adding certain fields to a record

- Allow a certain cataloger level to overwrite the above restrictions

- Exempt Network institution from the restrictions (coming soon)

- Restrict editing of 035 fields based on a prefix (coming soon)

Restrict Editing of NZ Metadata Fields – MARC21 Bibliographic Restrictions Policy Example

	Enabled	Tag	Restrict Add/Edit	Restrict Delete	Vocabulary	Overwite Cataloger Level	Updated By	Last Updated	
1.	🔴	035	True ▾	True ▾		Not Chosen ▾	exl_impl	04/11/2023	...
2.	🔴	020	True ▾	True ▾		[90] National I ▾	exl_impl	04/11/2023	...
3.	🔴	6XX	True ▾	True ▾	NLI	Not Chosen ▾	exl_impl	04/11/2023	...

1. Restrict add/edit/delete of 035 fields

2. Restrict add/edit/delete of 020 fields ; except for users with cataloging level = [90] National library level

3. Restrict add/edit/delete of 6XX fields only for NLI vocabulary

Restricted MARC21 Bibliographic Fields

Restricted 035 fields

Restricted 6XX fields linked to NLI

Cataloging Level Definition at Import Phase

- Central Office strength is managing a centralized catalog
  - From moment of import
  - Throughout lifecycle (Bib enrichment, Authorities)
  - On all levels of permissions
- Now available to define cataloging level per batch at import phase

CATALOGING

Cataloging Level Definition at Import Phase

Cataloging Level Definition at Import Phase – Logic

- New records
  - Automatically assigned with the selected cataloging level

- Matched records
  - If cataloging level is **equal to or lower than** the one defined on the import profile:
    - New cataloging level is assigned to all matched records
    - Overlay/merge methods applied
  - If cataloging level is **higher than** the one defined on the import profile:
    - Records are rejected and reported in the import report

Exclude Member Local Bib Records from NZ Publishing

- Central Office can publish Network and Institution level metadata to external systems

- Alma supports distinction between Network and Institution level publishing

- Added ability to exclude member local Bib records from NZ publishing, to protect member data

ADMIN

Network Zone Publishing Configuration

Item Retention

CATALOGING

- Formal agreements require libraries to commit to hold specific items (expense reduction, space saving, etc.)

- Alma allows acquiring library to:
  - Mark items as **"Committed to Retain"**
  - Add reason
  - Add note

- Marked items are protected from deletion

- Items can be tracked via Analytics and Advanced Search

Committed to Retain – Staff Search

Committed to Retain – Display Item Information

Committed to Retain – Network Zone Display

Committed to Retain – Physical Item Editor

Committed to Retain – Import Configuration

Committed to Retain – General Publishing

Committed to Retain – Item Deletion Prevention

What are our plans to enhance the consortia experience?

Working Together

- Established consortia focus groups

- Focus groups provided requirement consolidated document

- Thorough analysis conducted by Ex Libris

- Focus areas were identified

- Built consortia roadmap for 2023/24

Consortia

Return to Alma Roadmap Highlights Overview

Consortia

Overview

Alma supports consortia by providing a platform for working together and sharing resources, while allowing members to independently and separately manage their own library needs.

Roadmap

2023 H1	2023 H2	2024
• Display Logic Rules for Shared Electronic Resources Managed in the Network Zone	• Order of Shared Electronic Resources Managed in the Network Zone • Central Configuration By Central Office	• Blocks Across a Network • Real Time Update of Linked Accounts • Transit Network item Directly to Requested Location • User Groups in a Fulfillment Network

Central Configuration by Central Office

- Central Office requires ability to manage configurations and policies for members, for example:

  - Physical items sort routine

  - Exclude process types from discovery indexing

  - Direct linking

  - Push notifications 'banner' from NZ to all IZ's

  - Manage Physical Material Type Descriptions code table in the NZ

  - Manage Copyright statements in the NZ

  - Central NZ Cloud app configuration/activation

  - Distribution of Primo VE (configure views, labels and translations)

Protect Network Zone Bib Records (2023 H2)

- Central Office can choose to protect the Network Bibs from being deleted by members

- Alma will support the option to block deletion of NZ Bibs when:

  - The record has inventory attached (already supported)

  - The record is "committed to retain" based on field tagging

  - The record is related to other records

  - The record has local extensions

Protect NZ Bibs – Configuration Mockup

Protect NZ Bibs Committed to Retain – Configuration

	Enabled	Field	Subfield	Value	Updated By	Last Updated	
1	⬤	960	a	NEWBIB	exl_impl	04/17/2023	...

1. Prevent the deletion of NZ Bib record with MARC field 960 $a NEWBIB

Protect NZ Bibs with Relations – Configuration

	Enabled	Relation Type	Behavior	Updated By	Last Updated
1		Additional Form	Block ▼	-	-
2		Contains	Block ▼	-	-
3		Issued With	Block ▼	-	-
4		Links To	Block ▼	-	-
5		Main Series	Block ▼	-	-
6		Original Language	Block ▼	-	-
7		Other Edition	Block ▼	-	-
8		Other Relationship	Block ▼	-	-
9		Part Of	Block ▼	-	-
10		Precedes	Block ▼	-	-
11		Relation	Block ▼	-	-
12		Replaced By	Block ▼	-	-
13		Replaces	Block ▼	-	-
14		Subseries	Block ▼	-	-

Protect NZ Bibs with Local Extensions – Configuration

1. Prevent the deletion of NZ Bib record with a local extension in MARC21 field 773

2. Prevent the deletion of NZ Bib record with a local extension in MARC21 field 830

Deletion Prevention of Network Zone Bibs

Share Online Services Order in NZ (2024 H1)

- Online Services Order determines display order of services within e-collection

- Central Offices managing shared electronic resources can define preferred order of services for its members
  - Central Office sets up configuration in the NZ that is shared to members
  - Members define whether to inherit Central Office preferences

Consortia

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Thank you!

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