



Alma Consortia Management and Administration

Erez Shabo | May 2023



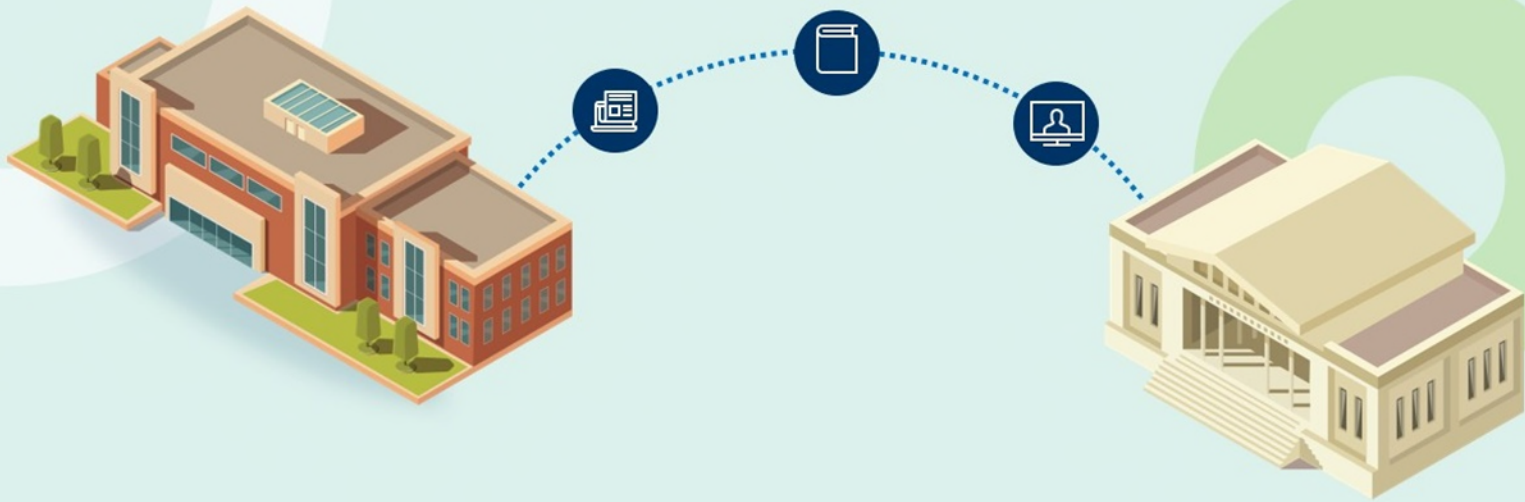
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Agenda

- 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?



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Types of Collaborative Networks



Collaboration for Patron Services

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

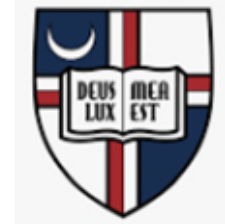


Collaboration for Technical Services

- Shared Catalog
- Joint Acquisitions
- Analytics
- Administration



Collaboration for Patron Services



Collaboration for Technical Services

Network Zone



CATALOGING

Shared
Catalog



ACQUISITIONS

Joint Acquisitions
and Negotiations



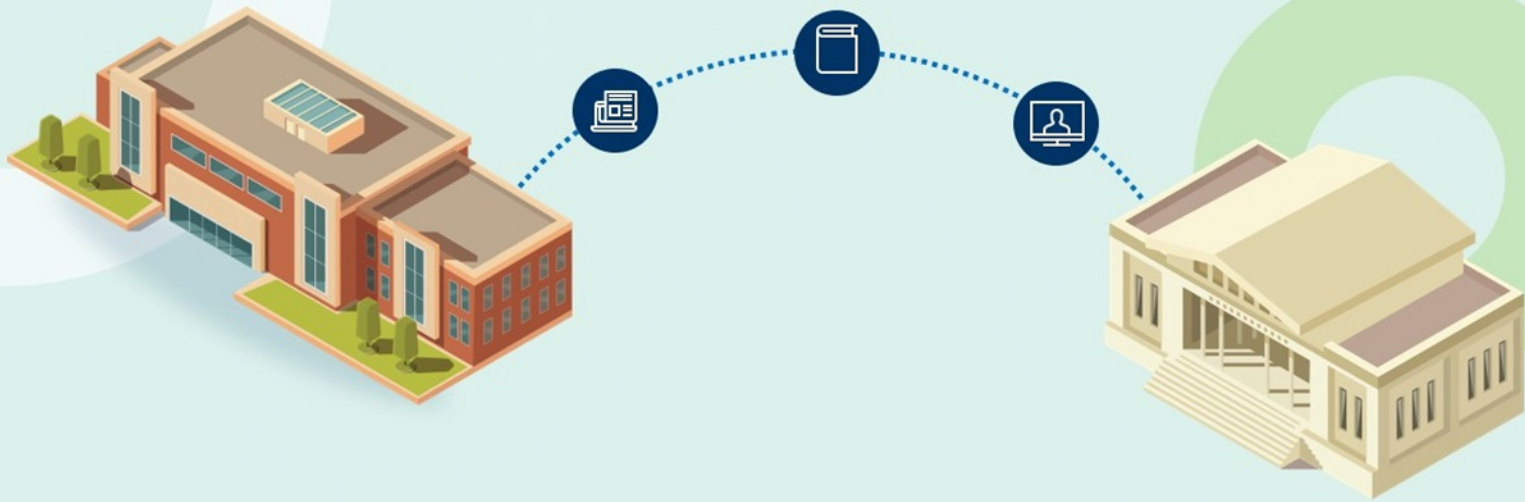
ANALYTICS

Shared Reporting
and Analysis



ADMINISTRATION

Central
Administration,
Configuration

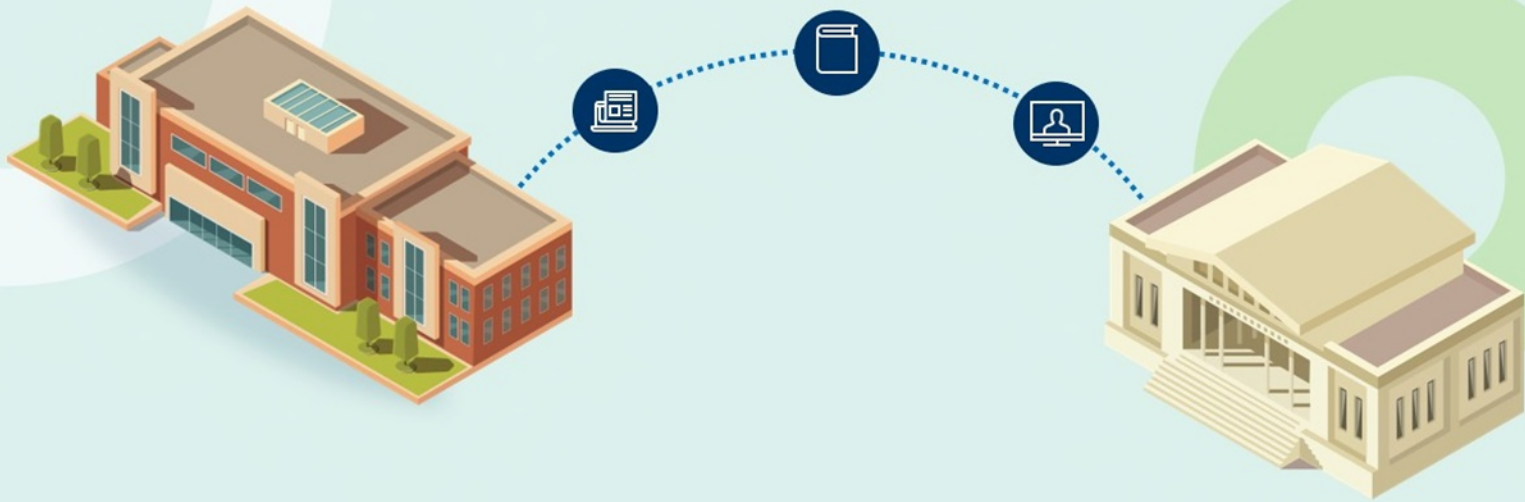


How is the Network Zone managed? What is a Central Office?

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?



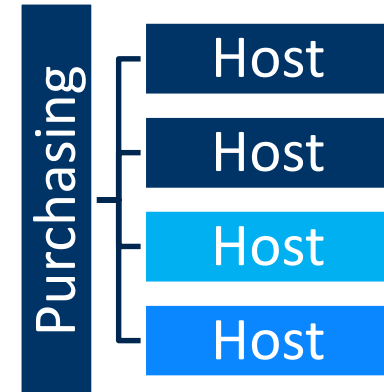
Joint Inventory Use



- 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

< Edit Physical Location

Cancel

Save

Physical Location Details

Code * SHARED

Host Location Configurations

Set inventory in host location

Host Institution * Training - Member 1 - Clean

Host Location * Main Library: Building 9 (offsite)

Automatically create an item in host library upon receiving

Withdraw item upon copying to host library

Provenance of the host's item

Place item in the host's 'In Process Items' list

Work order type status * Copy Cataloging

Accession Place

Call Number Type

Dewey Decimal classification

Suppress from Disc

Discovery Priority

Regular display

Host Location Configurations

Set inventory in host location

Restrict Editing of Network Zone Metadata Fields



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	Overwrite Cataloger Level	Updated By	Last Updated	
1. <input checked="" type="checkbox"/>	035	True	True		Not Chosen	ex_limpl	04/11/2023	...
2. <input checked="" type="checkbox"/>	020	True	True		[90] National l	ex_limpl	04/11/2023	...
3. <input checked="" type="checkbox"/>	6XX	True	True	NLI	Not Chosen	ex_limpl	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

Save New Record Actions Editing Actions Add Inventory View Related Data Order Search & Browse

Environmental history. (99312216000191)

Level [90]: [90] National Library Level Record

032	SSa	205020	SSb	USPS								
035	SSa	(Aleph)00769207BCL01										
035	SSa	(OCoLC)ocm33092825										
035	9	SSa	AEX1839									
037	SSb	Environmental History, 701 Vickers Ave., Durham, NC 27701	SSc	\$45.00 (institutions)								
040	SSa	NSD	SSc	NSD	SSd	HUL	SSd	DLC	SSd	WAU	SSd	DLC
042	SSa	nsdp	SSa	lc								
049	SSa	BXMM										
050	1	4	SSa	GE1	SSb	E585						
082	1	0	SSa	333	SS2	12						
210	0	SSa	Environ. hist.									
222	0	SSa	Environmental history									
245	0	0	SSa	Environmental history.								
246	1	3	SSa	EH								
246	1	0	SSa	E.H.								
260	SSa	Durham, N.C. :	SSb	American Society for Environmental History and Forest History Society,	SSc	c1996-						
300	SSa	v. :	SSb	maps ;	SSc	23 cm.						
310	SSa	Quarterly										
362	0	SSa	Vol. 1, no. 1 (Jan. 1996)-									
500	SSa	Title from cover.										
530	SSa	Also available on microfilm from University Microfilms.										
b	650	0	SSa	Human ecology	SSv	Periodical7						
-	650	7	SSa	Environmental protection	SSv	Periodicals.	SS2	NLI				
b	650	0	SSa	Conservation of natural resources	SSx	History	SSv	Periodicals.				
710	2	SSa	American Society for Environmental History.									
710	2	SSa	Forest History Society.									
780	0	4	SSt	Environmental history review	SSx	1053-4180	SSw	(DLC)	91649680	SSw	(OCoLC)	22195612
780	0	4	SSt	Forest & conservation history	SSx	1046-7009	SSw	(DLC)	90642572	SSw	(OCoLC)	20496086
948	SSa	LTI	08/08/2000									

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 Level Definition at Import Phase

Import Profile Details Save Draft Cancel Save

Profile Details | Normalization & Validation | Match Profile | Set Management Tags | **Inventory Information**

Set management tags for all the records imported using this profile

<input type="checkbox"/> Suppress record/s from publish/delivery	Condition	Only for new records
<input type="checkbox"/> Suppress record/s from external search	Condition	Only for new records
Synchronize with OCLC <input type="text" value="Don't publish"/>	Condition	Only for new records
Synchronize with Libraries Australia <input type="text" value="Don't publish"/>	Condition	Only for new records
<input type="checkbox"/> Set record/s cataloging level	Cataloging level	<input type="text" value="Look-up or select"/> [00] Default Level [20] Beginner Level [60] Intermediate Level [90] Expert Level

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



Network Zone Publishing Configuration

Publishing Profile Details 1 2 3 Cancel Back Save

Member Details Enrichment Add Members Information

Local Bibliographic Enrichment Add Member Local Fields

Members

Activate Selected Deactivate Selected  

<input type="checkbox"/>	Member Code	Member Name	Active	Exclude Local Bibliographic Records
1. <input type="checkbox"/>	TRAINING_MEMBER1_CLEAN	Training - Member 1 - Clean	<input type="checkbox"/>	<input type="checkbox"/>
2. <input type="checkbox"/>	TRAINING_MEMBER2_CLEAN	Training - Member 2 - Clean	<input type="checkbox"/>	<input type="checkbox"/>

Item Retention



- 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

Physical items ▾ Keywords ▾ *

Search in: Physical items ▾ Zone: Institution Community

Physical item: Committed to Retain ▾ Equals ▾ Yes ▾ + □ X

AND OR Physical item: Retention R ▾ Equals ▾ Alumni Publication ▾ + □ X

AND OR Physical item: Retention N ▾ Contains Keywords ▾ + □ X

AND OR ▾ Contains Keywords ▾ + □ X

Title >
Holdings >
Physical item ▾
Committed to **Retain**
Retention Note
Retention Reason

Clear form Search

Committed to Retain – Display Item Information

List of Items Back

1 - 3 of 3 Sort routine 0 rows selected Manage Selected

Status: All Library: All Location: All Year: All Volume: All Description: All Receive Date: All

<input type="checkbox"/>	Barcode	Library	Location	Call Number	Committed to Retain	Item Call Number	Year	Volume	Description	Temporary Location	Status	Process type	Access Number	Receiving date	<input type="button" value="⋮"/>
1 <input type="checkbox"/>	39031010469112		Art Stacks	NA1053.B69 P413 1974	Yes	-	-	-	-	No	Item in place	-	-	-	<input type="button" value="⋮"/>
2 <input type="checkbox"/>	39031013584933		Offsite Collection (NEDL NOAC)	NA1053.B69 P413 1974	Yes	-	-	-	-	No	Item in place	-	-	-	<input type="button" value="⋮"/>
3 <input type="checkbox"/>	39031010467215		Offsite Collection (NEDL NOAC)	NA1053.B69 P413 1974	Yes	-	-	-	-	No	Item in place	-	-	-	<input type="button" value="⋮"/>

1 Étienne-Louis Boullée (1728-1799); theoretician of revolutionary architecture. [Translated from the French by James Emmons.] Edit Item Request ⋮

Barcode: 39031010469112
Library: Bapst
Creation Date: 13/09/2021 20:28:39 PM IDT
Modification Date: 05/10/2022 18:22:51 PM IDT
Expected Arrival Time: -
On Hold Expiration Date: -
Due Date: -
Needed By: -
Permanent Location: Art Stacks

Call Number: NA1053.B69 P413 1974
Call Number Type: Library of Congress classification
Status: Item in place
Due back: -
Material Type: Book

Item ID: 23550102300001021
Holdings ID: 22550102320001021

MMS ID: 0010657230001021
Committed to Retain: Montclos, Jean-Marie. (New York, Braziller [1974])

[Other details](#)





Committed to Retain – Network Zone Display

< 'Held By' Details Back

Held by Institutions ▾

- Community College
- Alma College
- State College
- Open University
- Big University

Holdings (1) Portfolios (0) Representations (0) Electronic Collections (0) Orders (1)

Show All Items  

Year : All ▾ Volume : All ▾ Description : All ▾

1 **Library:** Alma Library
Location: Second Floor
Call Number: N 7445 .B53 1958
No. of Items: 1
Available: 0
Committed to Retain: 1
No. of Requests: 0

Committed to Retain – Physical Item Editor

Physical Item Editor Relink to another bibliographic record Cancel Save

General ENUM/CHRON Notes History **History Debug**

General Information >

Inventory Information >

Location Information >

Temporary Location Information >

Retention Information ▾

Committed to Retain No Yes

Retention Reason Institutional Affiliation ▾

Retention Note EAST

Committed to Retain – Import Configuration

< Import Profile Details

Save Draft

Cancel

Save

Profile Details

Normalization & Validation

Match Profile

Set Management Tags

Inventory Information

Mapping

Inventory Operations

Electronic Mixed Physical None

Physical Mapping

TEMPORARY LOCATION

Temporary library	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="button" value="⋮"/>
Temporary location	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="button" value="⋮"/>
Temporary call number	<input type="text"/>	<input type="text"/>	<input type="text"/>	
Temporary call number type	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="button" value="v"/>
Temporary item policy	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="button" value="v"/>
Due back date	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="button" value="📅"/>

Map temporary library/location

RETENTION INFORMATION

Committed to Retain	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="button" value="v"/>
Retention Reason	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="button" value="v"/>
Retention Note	<input type="text"/>	<input type="text"/>	<input type="text"/>	

ENUM/CHRON INFORMATION

Year of issue	<input type="text"/>	<input type="text"/>	<input type="text"/>
Enumeration A	<input type="text"/>	<input type="text"/>	<input type="text"/>

Committed to Retain – General Publishing

< Publishing Profile Details

1 — 2

Cancel

Back

Save

Physical Items Enrichment

Add Items Information

Repeatable field *

Item PID subfield

Copy ID subfield

Holdings ID subfield

Physical condition subfield

Retention reason subfield

Barcode subfield

Material type subfield

Campus of current library subfield

Committed to retain subfield

Retention note subfield

Committed to Retain – Item Deletion Prevention

Save New Record Actions Editing Actions Add Inventory View Related Data Order Search & Browse

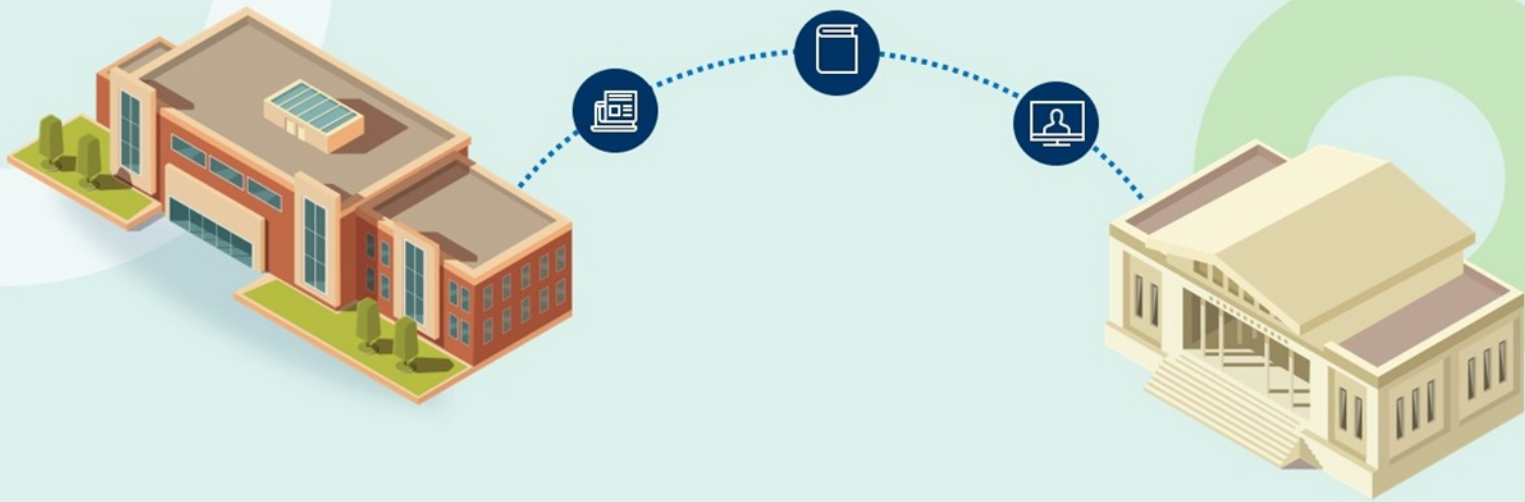
Étienne-Louis Boullée (1728-1799); theoretician of revolutionary architecture. [Translated from the French by James Emmons.] (99106572780001021)

Record MARC21 Bib 10edited 74

LDR	01000aam##2200301#a#4500
001	99106572780001021
005	20210913131525.0
008	740201s1974###nyua####b###001#0beng##
035	\$\$a (Aleph)000113740BCL01
035	\$\$a (OCoLC)ocm00810140
035	\$\$a (GRSN)00124739#89
035	\$\$a (GRSN)00124739
035	\$\$a AAR3583
040	\$\$a DLC \$\$c DLC \$\$d BXM
041 1	\$\$a engfre
050 0 0	\$\$a NA1053.B69 \$\$b P413 1974
100 1	\$\$a Pérouse de Montclos, Jean-Marie.
240 0 0	\$\$a Étienne-Louis Boullée. \$\$i English
245 1 0	\$\$a Étienne-Louis Boullée (1728-1799). \$\$b theoretician of revolutionary architecture. \$\$c [Translated from the French by James Emmons.]
260	\$\$a New York, \$\$b Braziller \$\$c [1974]
300	\$\$a 128 p. \$\$b illus. \$\$c 25 cm.
504	\$\$a Bibliography: p. 119-121.
600 1 0	\$\$a Boullée, Etienne Louis, \$\$d 1728-1799.
940	\$\$a RETAIN FOR EAST
948	\$\$a LTI 08/08/2000
950	\$\$a OL

Bibliographic Title Étienne-Louis Boullée (1728-1799); theoretician of revolutionary architecture. [Translated from the French by James Emmons.] cannot be deleted as it has: physical item(s) committed to retain.

Bibliographic Title Étienne-Louis Boullée (1728-1799); theoretician of revolutionary architecture. [Translated from the French by James Emmons.] cannot be deleted as it has: physical item(s) committed to retain.



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

[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.

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 - 1.1. Overview
 - 1.2. Roadmap
 - 1.3. 2023 H1
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 - 1.4. 2023 H2
 - 1.4.1. Order of Services for Shared Electronic Services Managed in the Network Zone
 - 1.4.2. Central Configuration by Central Office
 - 1.5. 2024
 - 1.5.1. Blocks Across a Network
 - 1.5.2. Real Time Update of Linked Accounts
 - 1.5.3. Transit Network Item Directly to Requested Location
 - 1.5.4. User Groups in a Fulfillment Network

Roadmap

2023 H1	2023 H2	2024
<ul style="list-style-type: none"> • Display Logic Rules for Shared Electronic Resources Managed in the Network Zone 	<ul style="list-style-type: none"> • Order of Shared Electronic Resources Managed in the Network Zone • Central Configuration By Central Office 	<ul style="list-style-type: none"> • 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

NETWORK Configuring: Training - Network Zone - Clean ▾

Alma QA	Search Configuration Search Indexes Customize Indexes Labels External Search Resources Search Profile Repository Search Additional Staff Search Fields	Deposit Deposit Return Reasons Deposit Decline Reasons Patron Deposit Templates Terms and Conditions Patron Deposit Labels Patron Deposit Customization	General Other Settings Processes Provenance Code Accession Number Item Sequences Control Number E Task Statuses Label Printing Tool Call Number Parsing Barcode Generation Description Templates Inventory Network Groups Physical Items Sort Routines Physical Material Type Descriptions Brief Levels Call Number Mapping Digital Storage Library/Location Display Representation Label Templates Resource Management Jobs Configuration Reminder Types Reminder Statuses Authority Control Task List Types Authority Control Rules Medium Type Multi Step Match Configuration
Acquisitions			
Resources			
Discovery	Cataloging Metadata Configuration Controlled Vocabulary Registry Controlled Vocabulary Registry - Forms Author Number Lists Local Transliteration Table for Author Number Generation BIB Redirection Fields Cataloger Permission Level MARC Slim Configuration DCMI Material Type Mapping MARC21 / KORMARC - Browse Bib Headings Names / Subjects	Collection Retention Bibliographic Collection Retention definition Item Retention Reason Bibliographic Record Deletion - Related Records Bibliographic Record Deletion - Local Extensions	
Fulfillment			
User Management			
General			
Analytics	Record Export Map Holdings fields into Bib record OCLC Institution OCLC symbol Map Holdings fields into Bib record Libraries Australia Institution NUC symbol		
	Record Import Originating Systems for MD records Remote Digital Repositories		

Protect NZ Bibs Committed to Retain – Configuration

	Enabled	Field	Subfield	Value	Updated By	Last Updated	
1	<input checked="" type="checkbox"/>	960	a	NEWBIB	ex_limpl	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	<input type="checkbox"/>	Additional Form	Block	-	-
2	<input type="checkbox"/>	Contains	Block	-	-
3	<input type="checkbox"/>	Issued With	Block	-	-
4	<input type="checkbox"/>	Links To	Block	-	-
5	<input type="checkbox"/>	Main Series	Block	-	-
6	<input type="checkbox"/>	Original Language	Block	-	-
7	<input type="checkbox"/>	Other Edition	Block	-	-
8	<input type="checkbox"/>	Other Relationship	Block	-	-
9	<input type="checkbox"/>	Part Of	Block	-	-
10	<input type="checkbox"/>	Precedes	Block	-	-
11	<input type="checkbox"/>	Relation	Block	-	-
12	<input type="checkbox"/>	Replaced By	Block	-	-
13	<input type="checkbox"/>	Replaces	Block	-	-
14	<input type="checkbox"/>	Subseries	Block	-	-

Protect NZ Bibs with Local Extensions – Configuration

< Bibliographic Record Deletion - Local Extensions Configuration Cancel Save

List of Local Extensions

1 - 2 of 2 + Add a New Extension 🔗 ⚙️

	Enabled	Profile	Local Extensions Field	Behavior	
1	<input checked="" type="checkbox"/>	MARC21 Bibliographic	773	BLOCK	⋮
2	<input checked="" type="checkbox"/>	MARC21 Bibliographic	830	BLOCK	⋮

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

Save New Record Actions Editing Actions Add Inventory View Related Data Order Search & Browse Quick links

Harry Potter and the prisoner of Azkaban / by J.K. Rowling ; illustrations by Mary Grandpré. (9924240600501)

Record MARC21 Bib 10 113

LDR 05982cam##2201141#a#4500

001 9924240600501

005 20230417060703.0

008 990408s1999####nyua###c#####000#1#eng##

010 \$\$a^^99023982^

010 \$e- 3A8EAA37 \$e- E4734030 \$e- 7344E03E \$e- 7344E074 \$e- 733207430 \$e- 733730766 \$e- 733207300 \$e- 8E0E0A043

**Bibliographic Title Harry Potter and the prisoner of Azkaban / by J.K. Rowling ; illustrations by Mary Grandpré.-9924240600501 cannot be deleted as it has:
an indication it is committed to retain in field 960/a**

029 1 \$\$a YDXCP \$\$b 1596717

029 1 \$\$a YDXCP \$\$b 1720563

029 1 \$\$a NZ1 \$\$b 2558809

029 1 \$\$a AU@ \$\$b 000020024972

029 1 \$\$a UNITY \$\$b 028490002

029 1 \$\$a UKWLT \$\$b 0439136350

029 1 \$\$a LQU \$\$b 110857

035 \$\$a (OCoLC)41266045 \$\$z (OCoLC)308560027 \$\$z (OCoLC)519740398 \$\$z (OCoLC)731456235 \$\$z (OCoLC)731460871 \$\$z (OCoLC)732687130 \$\$z (OCoLC)732729766 \$\$z (OCoLC)732830298 \$\$z (OCoLC)859600943

035 \$\$a (OCoLC)ocm41266045^

040 \$\$a DLC \$\$b eng \$\$c DLC \$\$d BAKER \$\$d GK8 \$\$d XY4 \$\$d YDXCP \$\$d BTCTA \$\$d LSH \$\$d CRU \$\$d SJE \$\$d Z87 \$\$d SADPL \$\$d TXBXL \$\$d MNW \$\$d EYP \$\$d CTN \$\$d FYF \$\$d VZD \$\$d MUO \$\$d OCLCF \$\$d OCLCO \$\$d CPA \$\$d Y38 \$\$d CZL \$\$d UKISA \$\$d OCL \$\$d OCWMS

042 \$\$a lca

043 \$\$a e-uk-en

050 0 0 \$\$a PZ7 R79835 \$\$b Ham 1999

082 0 0 \$\$a [Fic] \$\$2 21

**Bibliographic Title Harry Potter and the prisoner of Azkaban / by J.K. Rowling ; illustrations by Mary Grandpré.-9924240600501 cannot be deleted as it has:
an indication it is committed to retain in field 960/a**

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

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Thank you!

Erez.Shabo@clarivate.com

