



# Working with Collaborative Networks in Alma

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## Consortia in Alma

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## Overview of Collaborative Networks

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**NOTE:**

Configuration of a collaborative network must be handled by Ex Libris.

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Alma supports data sharing and collaboration across institutions in a streamlined manner. Each institution may choose its collaborative partners and establish a collaborative network to jointly manage shared resources.

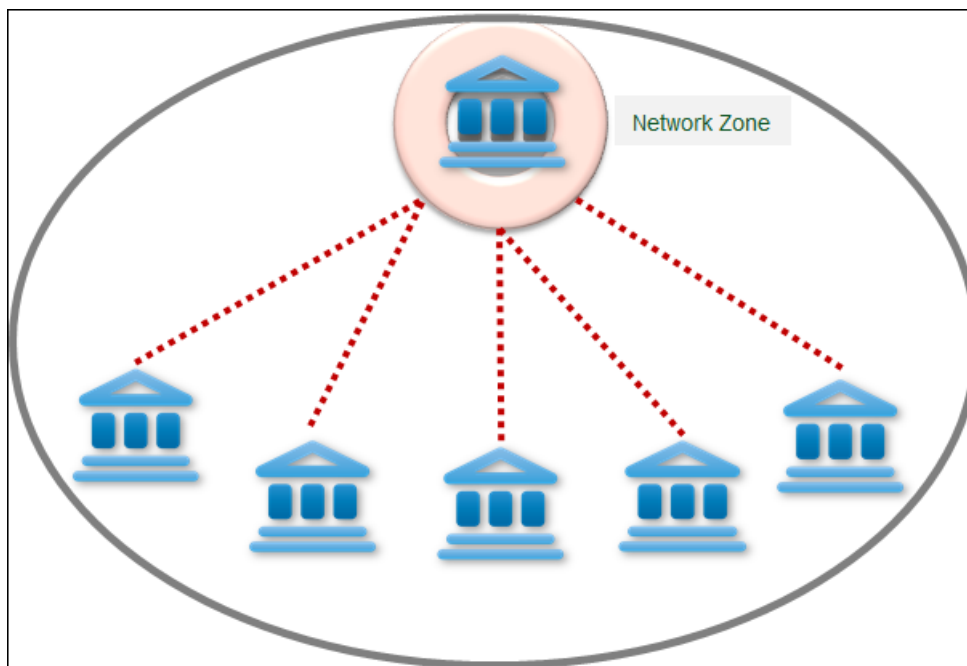


Figure 1: Collaborative Network

## Distributing Users Across a Network Zone

You can distribute a user in a Network Zone to all member institutions in the collaborative network. When doing so, the user becomes a registered user at all member institutions in the network. The user's account type remains the same after it is distributed (that is, external accounts remain external, and internal accounts remain internal).

When distributing a user to a Network Zone's member institutions, the new user inherits all roles from the user in the Network Zone, except for the following:

- Roles assigned to a specific library (such as Circulation Desk Operator)
- Roles assigned specific parameters on the User Roles Details page (see [Adding Roles to Users](#) in the *Alma Administration Guide*).

**To distribute a user from the Network Zone to the member institutions:**

On the Find and Manage Users page (**Administration > User Management > Find and Manage Users**), select **Actions > Distribute** for a user and click **Confirm** in the confirmation dialog box. The Find and Manage Users page reappears, and the user is distributed to the member institutions in the network.

## Sharing User IDs within a Fulfillment Network in a Network Zone

In a fulfillment network, if users have not already been distributed to each member institution (see [Distributing Users Across a Network Zone](#) on page 5), when a patron from institution A walks into institution B, the patron's information is retrieved from institution A as the first step of managing the patron's activities. The records at each institution contain a hidden field that indicates their relationship, but all identifier fields (such as student ID, barcode, etc) remain non-unique between institutions. The identifiers are not copied from the other institution.

Alternately, in a fulfillment network that contains members of a network zone, Ex Libris can configure that user identifiers that are identical for that patron throughout all linked institutions. For example, the fulfillment network can be configured such that a specified user name configured at one fulfillment network institution is automatically configured in the linked record at the other institutions.

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### NOTE:

If you use the same IDs to identify students at multiple institutions, ensure that these IDs are unique at all member institutions.

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To activate or to modify these settings after they have been configured, contact Ex Libris Support.

## Working with the Repository Search and MD Editor in a Collaborative Network

The Network Zone enables bibliographic data to be shared between collaborating institutions for cataloging and inventory purposes.

As part of the Network Zone environment, the **Network** tab is added to the Repository Search facility. Using this tab, collaborating institutions can search for resources within their shared network.

With the **Is linked** advanced search option for an **All Titles** search from the Institution tab, Alma provides a method for locating records that are linked (or not) to the Network Zone and the Community Zone. When performing the same search from the Network tab, all bibliographic records that are linked to the Community Zone will be displayed. The **Is linked** index (for **All Titles** searches) is defined the same for the Institution tab and the Network tab.

You can configure the default results tab for certain types of searches. For more information, see [Customizing the Repository Search](#) in the *Alma Resource Management Guide*.

The following is an example of search results. For an explanation of the icons and other indicators used, see [Icons and Indicators Displayed in the Network and Institution Tabs](#) below.

The screenshot shows the 'Repository Search' interface. At the top, there is a search bar with 'All titles' selected, a dropdown for 'where' set to 'Keywords', and a search term 'statistics'. Below the search bar are three tabs: 'Institution', 'Network' (which is selected), and 'Community'. On the left side, there are several filter sections: 'Limit results to:' with an 'Inventory' button; 'Material Type' with links for 'Electronic title', 'Digital title', and 'Physical title'; 'Material Type' with a list of counts: 'Book (15183)', 'Computer file (540)', and 'Journal (8238)'; 'Language' with links for 'Afrikaans (4)', 'Arabic (2)', and 'Bulgarian (2)'; and 'Publication Year' with links for '0195 - 1978 (5517)', '1979 - 1993 (5382)', and '1994 - 1999 (5010)'. The main search results area displays 8 items, each with a number, a title, author information, ISBN, and subject. Each result also has 'Edit' and 'Order' links.

Figure 2: Network Tab Search Results

#### NOTE:

The Network tab is available for collaborative network member institutions only. For the institution serving as the Network Zone, this tab is not available.

The following functions may be performed in relation to shared bibliographic data:

- Editing the shared bibliographic record – In the Network tab, click **Edit** beneath the record. The record opens in edit mode.
- Merging duplicate bibliographic records into one in the Network Zone – Bibliographic records can be merged when editing them from the results in the Network tab (using the MD Editor). For more information on merging

records, see [Merging Bibliographic Records](#) in the *Resource Management Guide*.

In a Network Zone environment, the records that you select to merge cannot include local member records. The records that you merge must be Network Zone bibliographic records.

Before merging the records, a note is provided with a list of all the other member institutions that also have inventory for the secondary record, which will be moved to the primary record. When you are logged in to the Network Zone system, the list of what you are about to move reflects the number of bibliographic record changes specific to the Network Zone inventory. When you are logged in to a member institution system, the list of what you are about to move reflects the number of bibliographic record changes specific to the local, member institution's inventory.

For the current institution that is performing the merge operation, the changes to the primary bibliographic record will be immediately available. For other member institutions that hold the primary bibliographic record, there may be a slight delay (up to five minutes) while the system handles the processing changes in the background.

- Linking to the shared bibliographic record – In the Network tab, click the record title link. On the MARC Record Simple View Page, click **Link** at the bottom of the page. A message indicating that the item was linked to the local institution is displayed at the top of the page. For an explanation of the icons that appear in the Network and Institution tabs, refer to [Icons and Indicators Displayed in the Network and Institution Tabs](#) on page 10.
- Copying the shared bibliographic record to the local repository – In the Network tab, click **Edit** beneath the record and select **File > Copy to institution** in the MD Editor. The record then appears in the Institution tab as well. After the record is copied locally, the system detaches any records at the member institutions that link to the same Community Zone record and links them to the enriched record at the Network Zone institution. The **Held By** field for the record at the Network Zone institution displays the member institutions that have inventory for this record.

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**NOTE:**

The localized records will no longer receive updates from the Community Zone, and any member institutions that have activated this resource will benefit from the updates made to the local record at the Network Zone institution.

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- Associating inventory with the shared bibliographic record – In the Network tab, click **Edit** beneath the record. Click the **Add Holdings** or **Add Items** button on the toolbar, or select **Tools > MARC21 Bibliographic > Add Local Portfolio** (refer to [MD Editor Menu and Toolbar Options](#) in the *Alma Resource Management Guide*). The inventory you create is automatically linked to the shared bibliographic record. For an explanation of the icons



that appear in the Network and Institution tabs, see [Icons and Indicators Displayed in the Network and Institution Tabs](#) below.

- Contributing a locally created record to the shared bibliographic record – In the Institution tab, click **Edit** beneath the record and select **File > Share with network** in the MD Editor. Refer to the procedure [To configure the MD Editor Share With Network function to find matches based upon the 035 field](#): below for information regarding how to configure the MD Editor **Share with Network** function.
- Validating changes to a record – Before contributing a record to the Network Zone, you can choose to validate changes to the record based on the collaborative network cataloging standards by selecting **Tools > Validate in Collaborative Zone** in the MD Editor. You can also choose whether you want to save changes to a revised record locally or in the network (**File > Options** in the MD Editor).
- Configuring error messages for 9XX fields added to Network Zone records – For information on configuring an error message to be displayed when adding 9XX fields to Network Zone records, see [Configuring an Error Message to Be Displayed When Manually Adding 9XX Fields to Network Zone Records](#) on page 16.
- Identifying brief records – Once your system has been configured for identifying brief records (refer to [Identifying Brief Records](#) on page 287 in the *Alma Administration Guide*), the MD Editor provides a **Brief** indicator for the records that have been identified as brief (refer to [Brief](#) on page 217 in the *Alma Resource Management Guide* for an explanation of this indicator).

In a collaborative network, both the Network Zone system and the member institution system may each be configured (by Ex Libris) with an algorithm to identify brief records. The brief record algorithm configured for the Network Zone (that is, the network institution) affects only the Network Zone records, and local records are defined as brief according to the brief record algorithm configured for the local member institution.

In general, it is suggested that member institutions of a collaborative network should use the same brief record algorithm for all members and for the network.

- View network members' order details - When you open the **Held by Details** page by clicking a member's **Held by** link in the search results, the **Orders** tab on the **Held by Details** page shows the order information for that member.

To configure the MD Editor Share With Network function to find matches based upon the 035 field:

- 1 Open the **Mapping Table** page for **Other Settings (Resource Management > Resource Configuration > Configuration Menu > General section > Other Settings)**.
- 2 For the **non\_serial\_match\_profile** parameter key, click **Customize** and enter the following value:
 

```
"com.exlibris.repository.mms.match.OCLCMatchProfile" ="035 (Other System Identifier) Match Method"
```
- 3 For the **serial\_match\_profile** parameter key, click **Customize** and enter the following value:
 

```
"com.exlibris.repository.mms.match.OCLCSerialMatchProfile" ="035 (Other System Identifier) Match Method"
```
- 4 Click **Save**.


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**NOTE:**

Sometimes, the **Share with Network** functionality may fail if the configuration settings differ between the Network Zone and the Institution Zone. The same match profile should be chosen for both the Network Zone and the Institution Zone.

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## Icons and Indicators Displayed in the Network and Institution Tabs

- **Library**  icon – This icon is displayed in the Network tab if the record is linked to the local institution (with or without inventory).
- **Held by: <institution name>** – This indicator is displayed in the Network tab if inventory exists for the resource at one of the network member institutions, including your own.

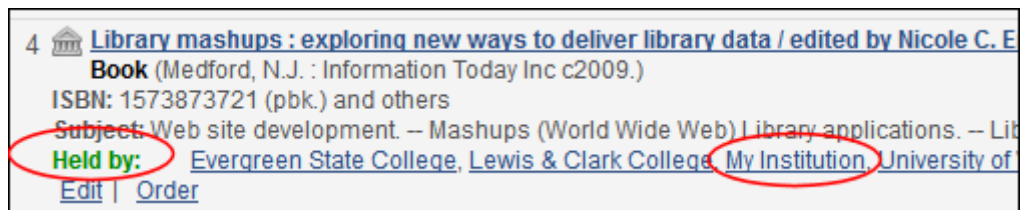



Figure 3: Held By Indicator in the Network Tab

You can click the institution's name and view detailed information of resources held by the institution, as illustrated below.

Title Statistics / Robert S. Witte, John S. Witte.			
Institution University			
Holdings(1)	Portfolios(0)	Representations(0)	Electronic Databases(0)
<p>1 Library: The Academy of Library and Information Science  Location: The Academy Down Town  Call Number: 823  No. of Items: 1  Available: 1</p>			

Figure 4: Display of Resources Held by the Institution

- **Community Zone**  icon – This icon is displayed in the Institution tab for bibliographic records of electronic resources that are activated from the Community Zone by individual Network Zone members.

Alma is able to show in the Network tab Community Zone bibliographic records that are used by members. The Network tab includes all bibliographic records of electronic resources that are activated from the Community Zone by the individual Network Zone members. Network Zone member holdings for these Community Zone bibliographic records can be accessed as described in the **Held by: <institution name>** explanation above. As a result, the Network Zone includes a comprehensive view of all bibliographic records in the collaborative network for both physical and electronic material.

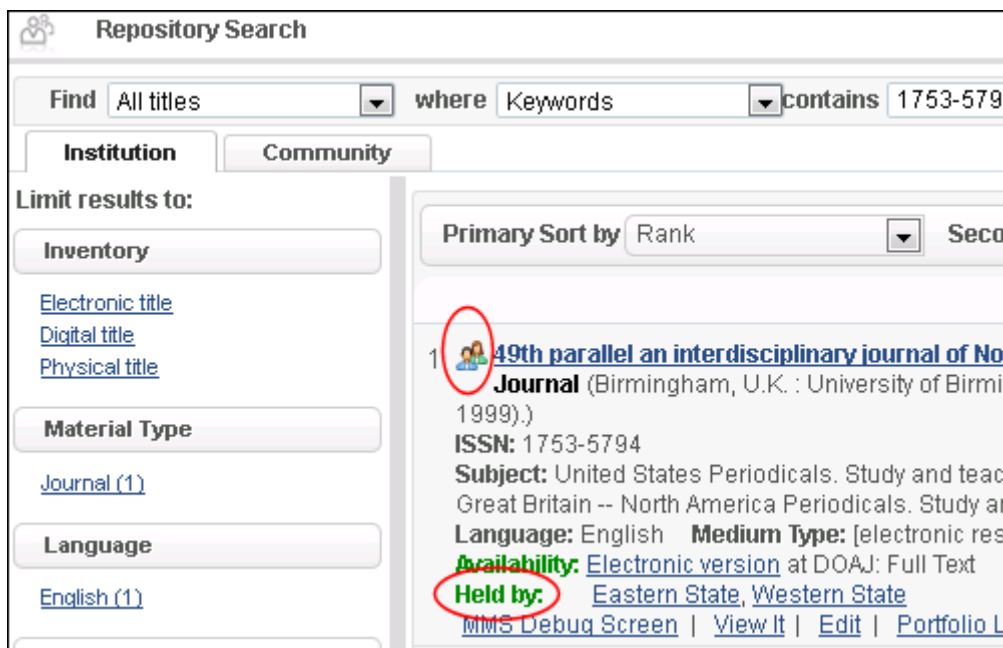


Figure 5: Institution Tab Displays the “49th parallel...” Record Logged into the Network Zone

- **Shared** icon – This icon is displayed in the Institution tab if a local resource is linked to a shared bibliographic record, as illustrated below.

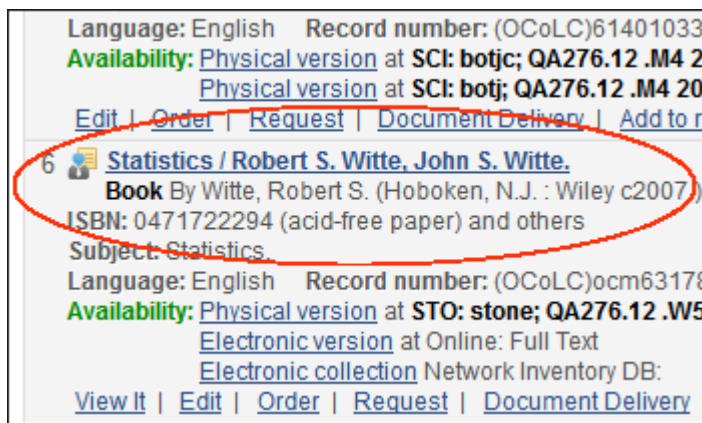


Figure 6: Institution Tab – Shared Icon

The **Shared** icon also displays in the Community tab to identify shared electronic resources. When member institutions do an **All titles** search in the Community Zone, Alma identifies Community Zone resources that are available to them via the Network Zone. When searching the Community tab, Alma places the **Shared** (network) icon next to the Community Zone

resource indicating that it is available to the member institution from its Network Zone (see below).

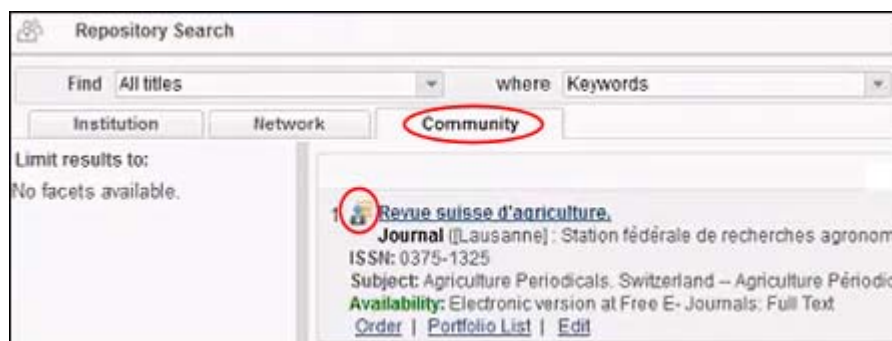


Figure 7: Community Zone Resource Identified as Available in the Network Zone from the Community Tab

Also, when searching from the Community tab, if a resource is available to the member in both the Institution Zone and the Network Zone, the Institution icon appears next to the resource on the Community tab (the local resource always takes precedence).

When doing an **Electronic Portfolio** or **Electronic Collection** search from the Community tab, if you don't have the resource at the Institution Zone and you do have it at the Network Zone, you see the **Shared** (network) icon next to the electronic portfolio or the electronic collection resource with the following exceptions:

- If the resource is identified as **Available For** your institution, the Institution icon appears next to the resource in the Community tab.
- If the resource is identified in an **Available For Group** that contains your institution, the Institution icon appears next to the resource in the Community tab.

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#### VIDEO:

For information about improved visualization of shared electronic resources with the shared icon, see the *Improved Visualization of Shared Electronic Resources* video (1:13 mins).

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For information on additional icons that can be found in search results (that are not collaborative network-specific), see **Using the Repository Search Results List** in the *Alma Resource Management Guide*.

## Coverage Statement Provided with Available For Group Information in Staff Search Results

In multicampus and collaborative network environments, Alma includes portfolio coverage information as it relates to the Available For group(s) in Repository Search results. Refer to the illustration below for an example.

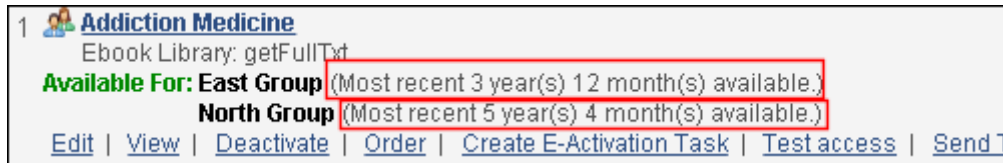


Figure 8: Available For Coverage Statement

## Available For Service Level Displays in Electronic Collection Search Results

When Available For groups settings are specified at the service level, they display in the search results of the electronic collection to which they are attached. Since Available For settings at the service level override the Available For settings at the electronic collection level, it is beneficial to see the service level settings in the electronic collection search results in order to know who has access to the electronic resource because it is possible for the electronic collection and electronic service Available For group settings to be different. Refer to the illustrations below.

The electronic collection search results for this example are:

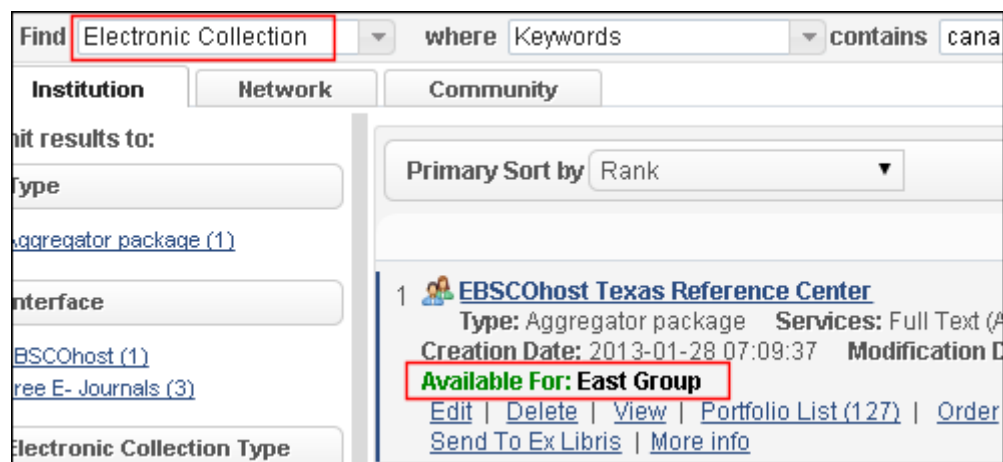


Figure 9: Electronic Collection Search Results with Available For Service Level Indicated

The electronic collection (*EBSCOhost Texas Reference Center*) Available For Group Setting is North Group in the following example:

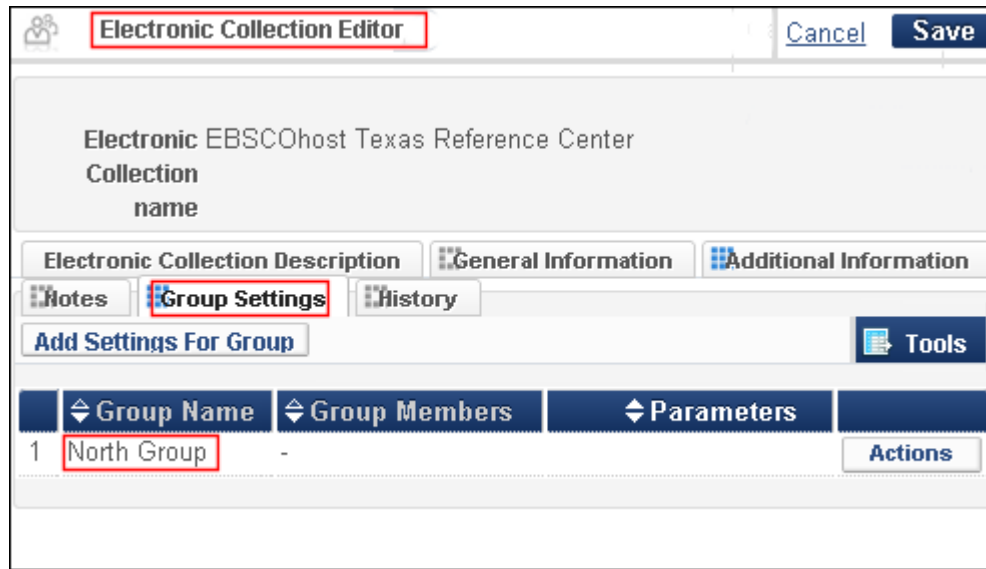


Figure 10: Available For Group Setting for Electronic Collection

The electronic service Available For Group Setting for *EBSCOhost Texas Reference Center* is East Group in the following example:

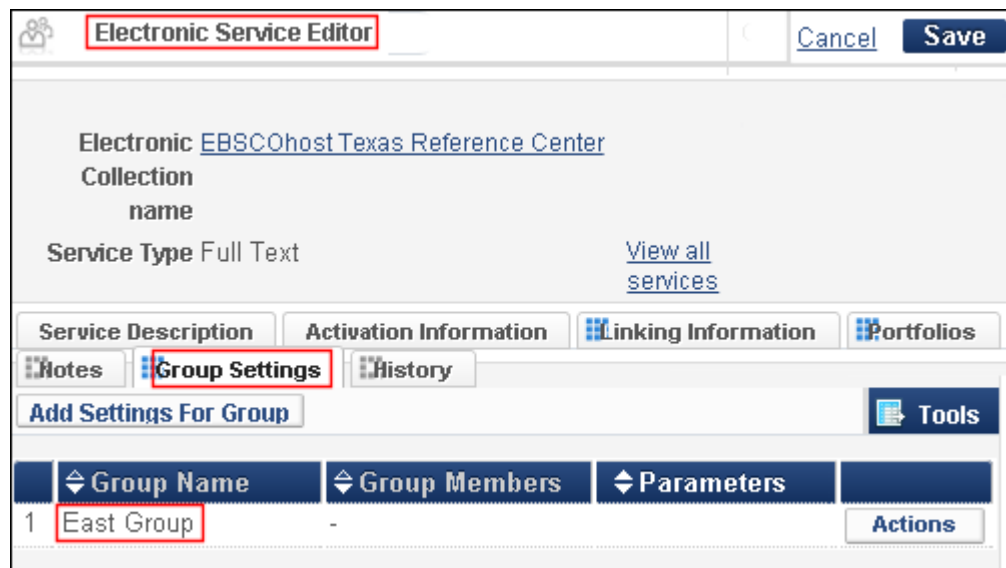


Figure 11: Available For Group Setting for Electronic Service

Since the electronic service Available For Group Setting overrides the electronic collection Group Setting, the electronic collection search results in **Figure 9** display East Group, the electronic service level setting (that takes priority).

## Configuring an Error Message to Be Displayed When Manually Adding 9XX Fields to Network Zone Records

By default, when you manually add 9XX local fields to the Network Zone using the MD Editor, only a warning message is displayed and not an error message. You can, however, configure Alma to display an error message (in red) and prevent the modified record from being saved.

To configure Alma to display an error message and prevent the record from being saved:

- 1 On the Metadata Configuration List page (**Resource Management > Resource Configuration > Configuration Menu > Cataloging > Metadata Configuration**), click the **MARC21 Bibliographic** link in the Profile column.
- 2 Click the **Validation Exception Profile List** tab.
- 3 Select **Actions > Edit** for the MARC XML Bib Metadata Editing On Save profile.
- 4 On the Validation Severity Profile Exceptions page, select **Local field cannot be added on network record** in the Add Validation Severity Exception section, and click the **Add Validation Severity Exception** button.



Figure 12: Add Validation Severity Exception

When adding a 9XX local field to a network zone record, you will receive an error message such as the following and Alma will prevent you from saving the record.



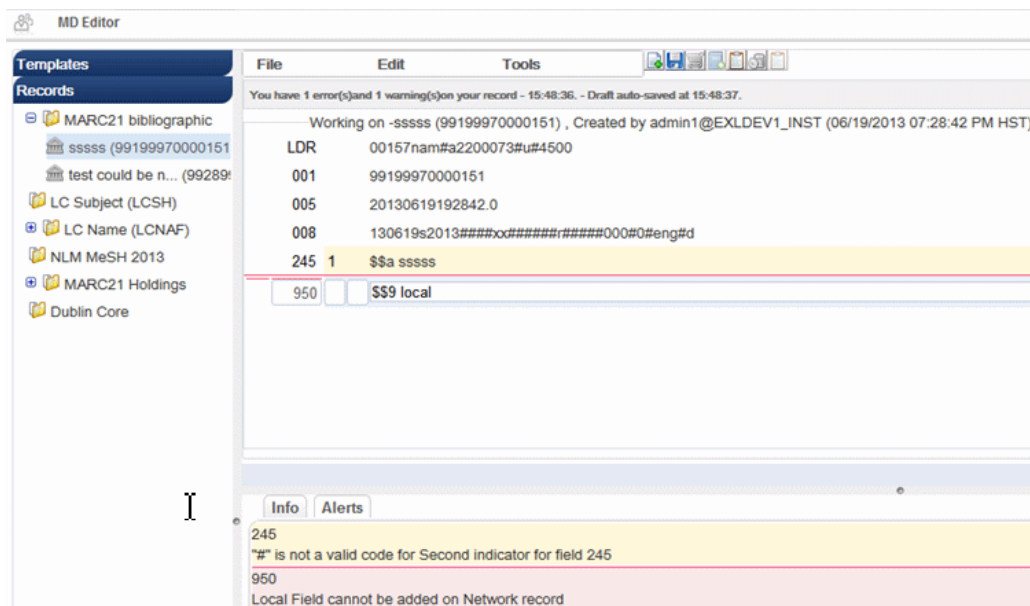


Figure 13: Displayed Error Message in MD Editor

## Working with Available For Group Information in the Community Zone Updates Task List

For multicampus or collaborative network environments, Alma has added an **Available For** filter and a new **Available For** column to the Community Zone Updates Task List page (**Resource Management > Manage Inventory > Community Zone Updates Task List**).

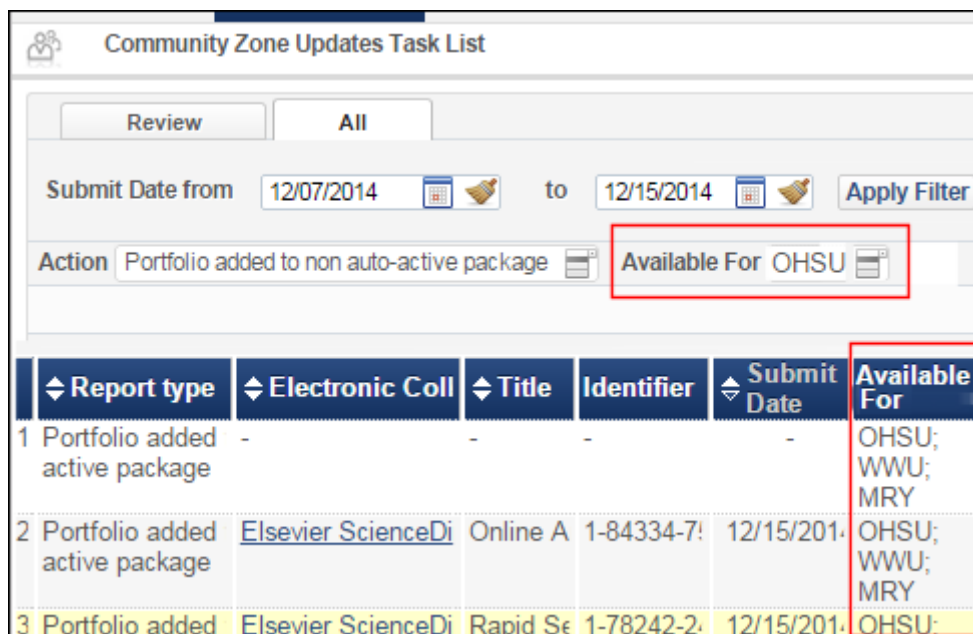


Figure 14: Available For Filter and Available For Column

With the **Available For** filter, you can choose to display the Community Zone Updates Task List by group. The **Available For** filter works in combination with any selections that you have made with the **Action** filter.

The display of the **Available For** filter and the **Available For** column is effective with the January release starting on 4 January 2015. If you choose to view the Community Zone Updates Task List with a date range prior to 4 January 2015, the **Available For** filter and the **Available For** column will not display.

The groups that display in the **Available For** column reflect the most current Available For information effective with the most recent harvesting. This is the harvesting that runs on the Community Zone data every week after midnight on Sunday.

## Local Extensions to Bibliographic Records in the Network Zone

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### PERMISSIONS:

- Catalog Operator
  - Catalog Manager
-

Alma provides the ability to add and edit local extensions to a bibliographic record that is maintained in the Network Zone. The purpose of the local extensions is to provide a place for you to enter local information and, at the same time, maintain the integrity to the original and ongoing updated versions of the Network Zone record for other Network Zone members.

Specifically, you can enter local information in the 9XX fields. These fields are always identified as local fields. Also, the 09X, 59X, and 69X fields may contain local information. However, these fields may also be a part of the Network Zone record. Local extensions may be added using the MD Editor (refer to [Adding Local Extensions Using the MD Editor](#) on page 19) and by running a MARC 21 Bib Normalization job (refer to [Adding Local Extensions by Running a MARC 21 Bib Normalization Job](#) on page 22).

## Adding Local Extensions Using the MD Editor

When you are working in the MD Editor, local fields for Network Zone records are identified by the library icon.

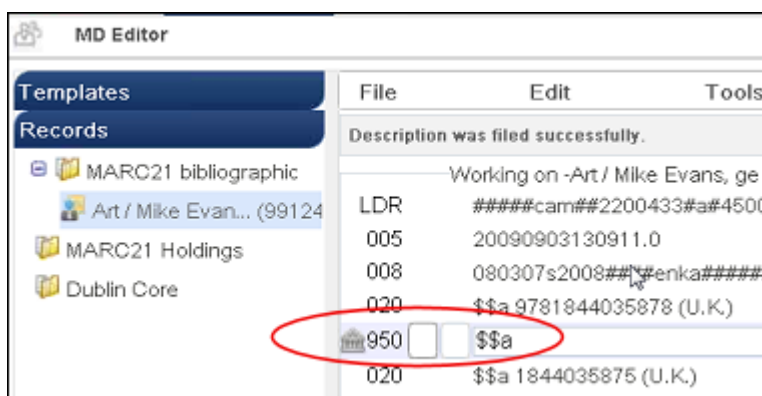


Figure 15: Local Library Icon for a Network Zone Record

### To add a local field to a Network Zone record using the MD Editor:

- 1 Open a Network Zone record in the MD Editor.
- 2 Select **Edit > Add Localized Field** to enter 9XX, 09X, 59X, or 69X field numbers.

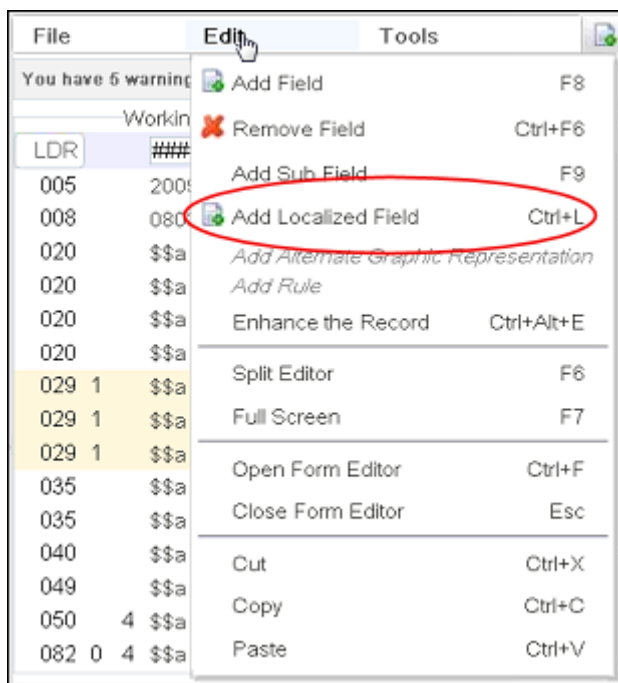


Figure 16: Add Localized Field Menu Option

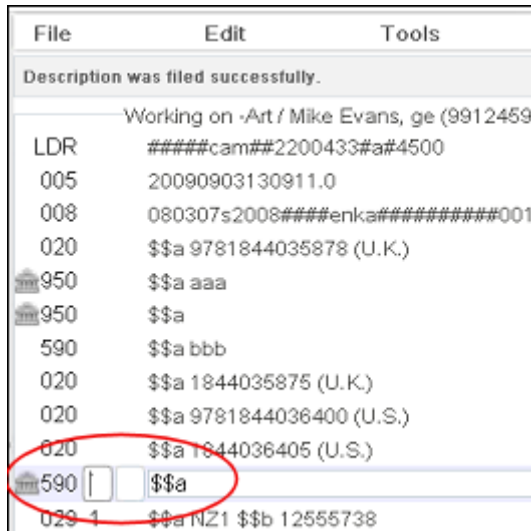


Figure 17: 59X Field Added as a Local Field

See below for an illustration of a record that is maintained in the Network Zone that has different local field extensions for different Network Zone members.

ExLibris Alma Development

MARC Record Simple View

Title Network Record

MMS ID 992081010000121 Originating system WST Originating system ID 9924000000151

Suppress from publishing No Synchronize with external system No Brief record No

LDR 00306nam a2200109 u 4500

001 992081010000121

005 20130718024310.0

008 130704s2013 xx r 000 0 eng d

245 10 |a Network Record

950 \_\_ |a local data on institution1

985 \_\_ |a Shared data on network

985 lo |a local data on institution1

Figure 18: Local Field Extension Example 1

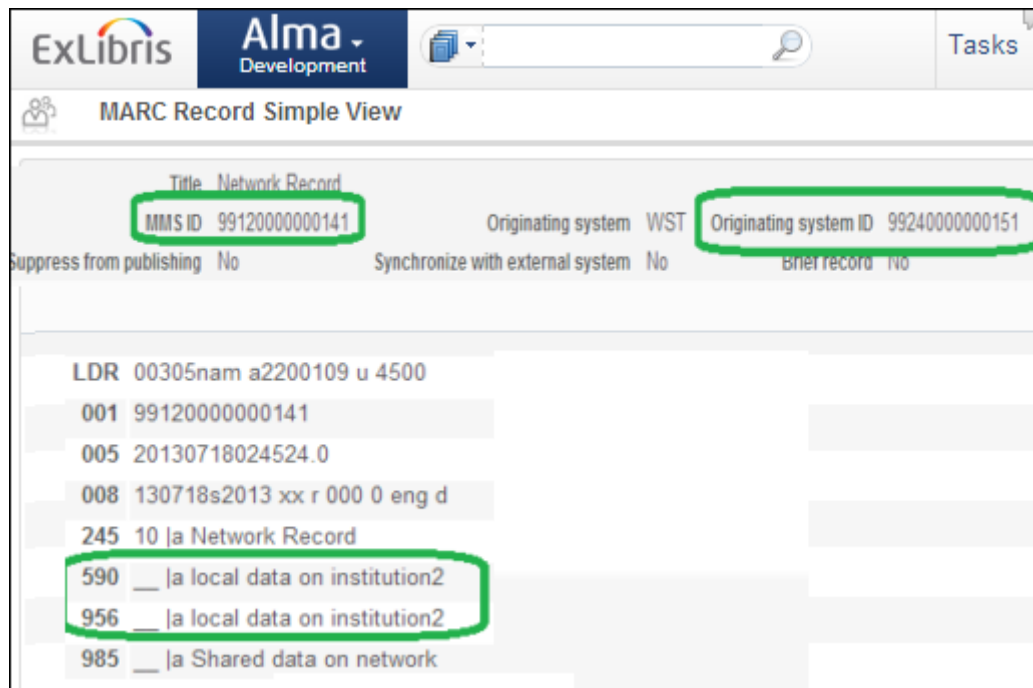


Figure 19: Local Field Extension Example 2

## Adding Local Extensions by Running a MARC 21 Bib Normalization Job

You can use the MARC 21 Bib Normalization job to normalize Network Zone-linked records that contain local fields such as the 9XX fields. This job only makes changes to the local fields and saves them to the Institution Zone. Since these are local changes, they are not distributed to the Network Zone or other members.

This feature extends the functionality of the normalization drool (part of a normalization process) for records that are linked to the Network Zone. The normalization processes can be accessed/added on the Normalization tab of the Profile Details page (**Resource Management > Resource Configuration > Configuration Menu > Cataloging section > Metadata Configuration > click MARC21 Bibliographic link**).

Profile Details				Back
Profile		MARC21 Bibliographic	Family	
Type		Bibliographic	Usage	
			BIB_MMS	
Fields	Normalization	Validation	Validation Exception Profile List	
Add Process				Tools
	Active	Name	Description	Actions
1	✓	<a href="#">Add 245 with subfield h Journal</a>	Add 245 with subfield h Journal	Actions
2	✓	<a href="#">JEB test of syntax</a>	xx	Actions
3	✓	<a href="#">Marc21 Bib Initial Normalization</a>	Initial normalization for Marc21 Bib record	Actions
4	✓	<a href="#">Marc21 Bib normalize on save</a>	Normalize Marc 21 Bib while saving	Actions
5	✓	<a href="#">Marc21 Bib Re-sequence</a>	Marc21 Bib Re-sequence	Actions
6	✓	<a href="#">Marc21 Bib Re-sequence And Clear</a>	Marc 21 Bib Re-sequence and clear empty fields	Actions
7	✓	<a href="#">move 001 to 009 and create new 001</a>	move 001 to 009 and create new 001	Actions
8	✓	<a href="#">remove 975 process</a>	removes 975 process	Actions
9	✓	<a href="#">Remove Vendor Data 949</a>	Remove vendor 949 field from MARC	Actions
10	✓	<a href="#">Remove Vendor Data 980 981 993</a>	Remove vendor 980, 981 and 993 fields from MARC	Actions
11	✓	<a href="#">Run a normalization rule on a set of records</a>	This should allow any user to run an established normalization rule on an established set of records	Actions
12	✓	<a href="#">stom</a>	stom	Actions
13	✓	<a href="#">Suppress Bib records from discovery</a>	Marks MMS records as suppressed or non-suppressed from discovery	Actions
14	✓	<a href="#">Synchronize Bib records with external catalogs</a>	Marks MMS records for synchronization or non-synchronization with external catalogs	Actions
15	✓	<a href="#">test EXL remove 975 process</a>	test EXL remove 975 process	Actions

Figure 20: Normalization Tab for MARC21 Bibliographic Processes

### To run a batch job to make global changes on local extensions on Network Zone-linked records:

- 1 Create a normalization rule to be selected for the **Drools File Key** parameter in the next steps. See **To create a new normalization rule file:** on page 309 in the section **Working with Normalization Rules** on page 308 in the *Alma Resource Management Guide*.
- 2 Create a normalization process for the purpose of adding local extensions to Network Zone-linked records. See **To add a process:** on page 824 in the section **Working with Normalization Processes** on page 820 in the *Alma Resource Management Guide*.
- 3 Create/save the set of records to be updated.
- 4 Run a normalization job. The job's name is based on a normalization process that you already created and appears in the list of manual jobs that you can run on defined sets. For more information, see **Running Manual Jobs on Defined Sets** in the *Alma Administration Guide*.

## Linking Sets of Institution Zone Records to Network Zone Records

---

### PERMISSIONS:

- Digital Inventory Operator
  - Catalog Manager or Administrator
  - Electronic Inventory Operator
  - Repository Manager
  - Requests Operator
- 

Alma provides the ability to link Institution Zone bibliographic records to bibliographic records that are managed in the Network Zone. You do this by running a job called **Linking set records to Network Zone** on the set of records.

To link sets of Institution Zone records to Network Zone records:

Run the **Link a set of records to the Network Zone** job. For more information, see **Running Manual Jobs on Defined Sets** in the *Alma Administration Guide*.

## Overlaying Community Zone Records in the Network Zone

---

### PERMISSIONS:

- Digital Inventory Operator
  - Catalog Manager or Administrator
  - Electronic Inventory Operator
  - Repository Manager or Administrator
  - Requests Operator
- 

Alma allows Institution Zone members to import full bibliographic records and overlay the brief Community Zone bibliographic records in the Network Zone and also retain which member institutions have activated the resources (which is indicated by the **Held By** field).



**VIDEO:**

For more information on overlaying community zone records in the network zone, see the *Overlay Community Zone Records in the Network Zone* video (9:51 mins).

**To overlay Community Zone records in the Network Zone:**

- 1 On the Resource Management Configuration page (**Resource Management > Resource Configuration > Configuration Menu**), click **Import Profiles** under **Record Import**.

The Run Import page opens.

- 2 Scroll to the import profile that you want to edit in the list or locate it using the Find box at the top of the list, and then select **Actions > Edit**.

The Import Profile Details page opens.

- 3 Click the **Match Profile** tab to open it.

**Import Profile Details**

Profile Type Repository

Profile Details Normalization & Validation **Match Profile** S

**Match Profile**

Serial match method Fuzzy Serial Match Method

Non Serial match method Fuzzy Non-Serial Match Method

**Match Actions**

Upon match  Import  Do Not Import  Merge  Overlay

Allow bibliographic record deletion

**Unlink bibliographic records from community zone**

Handling method  Automatic  Manual

Merge method Conditional subject headings

Figure 21: Import Profile Details Page - Match Profile Tab

- 4 Select the **Unlink bibliographic records from community zone** check box.

**NOTE:**

This field appears only if the **ignore\_cz\_records** parameter is set to **false** in the CustomerParameters mapping table (**Resource Management > Resource Configuration > Configuration Menu > Other Settings**).

**5 Click Save.**

For more information about creating import profiles in a collaborative network, refer to **Working With Import Profiles for the Collaborative Network** on page 28.

## Configuring Rota Templates and Rota Assignment Rules in the Network Zone

**PERMISSIONS:**

To configure a rota template, you must have the following role:

- Resource Sharing Partners Manager (assigned in the Network Zone)

To configure a rota assignment rule, you must have the following role:

- Fulfillment Administrator (assigned in the Network Zone)

Rota templates and rota assignment rules can now be centrally configured in the Network Zone and automatically distributed to the network member institutions. Rota templates and rota assignment rules display on their respective pages with a Scope value of Network.

The Distribute Central Resource Sharing Configuration job distributes the rota templates and rota assignment rules to all network member institutions. The job is monitored in the Network Zone.

**To save a rota template located in the Network Zone to the Institution Zone:**

- 1** On the Rota Templates page (**Fulfillment > Resource Sharing > Rota Templates**), locate a template with a **Scope** value of **Network**.

Name	Code	Status	Type	Scope
1 eyal1	eyal1	Active	Non Ordered	
2 rota2	rota2	Active	Non Ordered	Network

Figure 22: Rota Templates Page – Network Scope

- 2 Select **Actions > Duplicate**. The General Information page opens, where you can modify the parameters of the rota template.
- 3 Click **Save**. The template saves as an institution template (**Scope = Institution**).

**NOTE:**

The **Network Rules List** section displays only after the Distribute Central Resource Sharing Configuration job runs and copies the rota templates to the Network Zone's member institutions. For details on the Distribute Central Resource Sharing Configuration job output, see **Distribute Central Resource Sharing Configuration** in the *Alma Administration Guide*.

To save a rota assignment rule located in the Network Zone to the Institution Zone:

- 1 On the Rota Assignment Rules List page (**Fulfillment > Fulfillment Configuration > Configuration Menu > Resource Sharing > Rota Assignment Rules**), locate a rule in the **Network Rules List** section.

Rule Name	Description	Updated By	Update Date
1 Rule 1	The first rule	Implementor, Ex Libris	10/09/2014

Figure 23: Rota Assignment Rules List Page – Network Rules List Section

**NOTE:**

The **Network Rules List** section displays only after the Distribute Central Resource Sharing Configuration job runs and copies the rota templates to the Network Zone's member institutions. For details on the Distribute Central Resource Sharing Configuration job output, see **Distribute Central Resource Sharing Configuration** in the *Alma Administration Guide*.

- 2 Select **Actions > Duplicate**. The Rota Assignment Rules page opens, where you can modify the parameters of the rota assignment rule.
- 3 Click **Save**. The rule saves as an institution rule (**Scope = Institution**). The **Update Date** value updates accordingly.

## Using the Network Harvesting Report

Institution bibliographic records that are linked to bibliographic records managed in the Network Zone are automatically updated with any modifications that took place in the Network Zone. Alma provides a detailed Network Harvesting report that displays a list of all updates, deletions (that is, links to the resource that were deleted), and errors for these records.

The Network Harvesting report (**Resource Management > Manage Inventory > Network Harvesting Report List**) is available to all network member institutions and is refreshed every five minutes. It contains the following information for each resource:

- Resource ID
- Type of operation in the network (update, deletion, error)
- ID of the member institution that performed the operation
- Date of the operation

Identifier	Operation Type	Updated By	Modification Date
Statistics /	Update	System#####1021	06/03/2013
Statistics /	Update	System#####1021	06/03/2013
Statistics demystified /	Update	System#####1021	06/03/2013
Statistics /	Update	System#####1021	06/03/2013
Statistics demystified /	Update	System#####1021	06/06/2013

Figure 24: Network Harvesting Report

## Working With Import Profiles for the Collaborative Network

Any network member institution can configure import profiles of any type (authority, initial authority, new order, update inventory, repository) and specify that record files be handled through the Network Zone rather than the local institution during the Run Import process. For general information on configuring import profiles, refer to **Importing Records Using Profiles** in the *Alma Resource Management Guide*.

### To define an import file for the Network Zone:

- 1 On the Run Import page (**Resource Management > Resource Configuration > Configuration Menu > Import Profiles** or **Acquisitions > Acquisitions Configuration > Configuration Menu > Import Profiles**), click **Add New Profile**. The Import Profile Details wizard opens.
- 2 Choose the profile type and click **Next**. Step 2 of the Import Profile Details wizard opens with an additional option, **Use Network Zone**, displayed.

Figure 25: Import Profile Details – Step 2

- 3 Select the **Use Network Zone** check box, fill in the other parameters as described in [Creating an Import Profile Part 2: Entering Profile Details](#) in the *Alma Resource Management Guide*, and click **Next**.  
For more information regarding **Use Network Zone**, refer to [Update Network Zone Bibliographic Records as Part of the Shelf-Ready Workflow](#) on page 31.
- 4 Fill in the parameters in step 3 of the wizard as described in [Creating an Import Profile Part 2: Entering Profile Details](#) in the *Alma Resource Management Guide* and click **Next**.
- 5 In step 4 of the wizard, different options are displayed in the **Match Actions** and **No Match** sections.
  - Under **Match Actions**, instead of Import, there is a **Use NZ record** option. Select this option to link to the matching Network Zone record instead of importing a new record in the case of a match.
  - Also under **Match Actions**, to have obsolete or discontinued records deleted from the network zone, select the check box **Allow bibliographic record deletion**. (See [Figure 26](#).) The system checks to

make sure no institutions are linked to the Network Zone record before deleting the record.

- Under **No Match**, select whether you want to add the record to the Network Zone, import a local copy of the record (**Import to IZ**), or not import the record at all if no matching record is found.

Figure 26: Import Profile Details – Step 4

- 6 Click **Next** and proceed with the following steps in the wizard as described in **Creating an Import Profile Part 2: Entering Profile Details** in the *Alma Resource Management Guide*.

For information on importing record files using the import profile you created, see **Running a New Import Job** in the *Alma Resource Management Guide*.

#### NOTE:

Effective with the November 2015 release, the match mechanism for the Network Zone has been enhanced for import processing. Previously, when a member import found a match in the Network Zone and the bibliographic record in the Network Zone was linked to the Community Zone, the Network Zone record attached to the Community Zone was skipped and was not presented to the member in the Institution Zone. With the November 2015 enhancement, import processing presents the Community Zone linked record in the Institution Zone (identified in the member's Repository Search results with the Community Zone icon on the Institution tab), enabling the member to create inventory/PO lines. If you prefer the older method for handling matches, contact Ex Libris

---

Support to disable the parameter for the November 2015 enhancement. The November 2015 enhancement also assumes that the customer parameter (`ignore_cz_records`) in the mapping table for ignore Community Zone records is set to **false**.

---

## Update Network Zone Bibliographic Records as Part of the Shelf-Ready Workflow

It is possible to update Network Zone bibliographic records as part of the shelf-ready workflow. This is accomplished with the import profile parameter **Use Network Zone**.

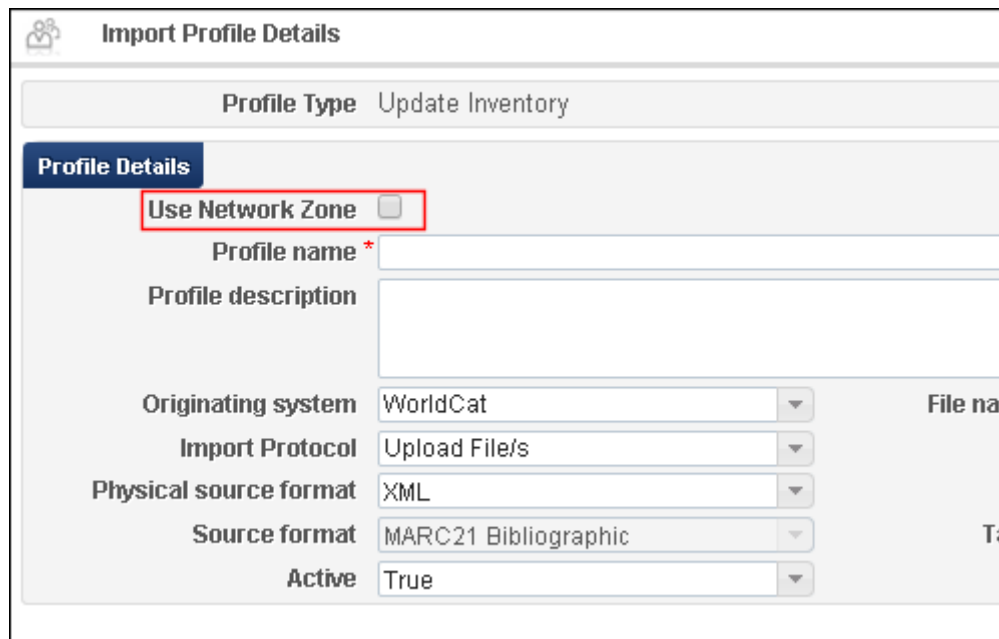
With this parameter and the **By PO Line** match method selected, the system is able to merge/overlay Network Zone bibliographic records, in addition to updating inventory, when the import job is run by a member institution. This is especially useful when the imported bibliographic record is a full bibliographic record that you want to automatically merge with or overlay on a brief bibliographic record in the Network Zone.

With the **Use Network Zone** parameter selected for import profiles that are updating inventory using the **By PO Line** match method, the system focuses only on Network Zone-linked bibliographic records and ignores/skips the local bibliographic records while continuing to use the local PO line data to identify matching records. The import job report provides a count for **Number of records skipped**. If this number is greater than zero, there are local records (records not linked to the Network Zone) that were not processed as part of the import job and will need to be handled separately.

**To create an import profile with the Use Network Zone parameter:**

- 1 Open the Run Import page (**Resource Management > Resource Configuration > Configuration Menu > Record Import section > Import Profiles**).
- 2 Click **Add New Profile**.
- 3 Select the Update Inventory profile type and click **Next**.

The Import Profile Details page opens with the **Use Network Zone** parameter in the **Profile Details** section.



**Import Profile Details**

Profile Type Update Inventory

**Profile Details**

**Use Network Zone**

Profile name \*

Profile description

Originating system WorldCat

Import Protocol Upload File/s

Physical source format XML

Source format MARC21 Bibliographic

Active True

Figure 27: Use Network Zone Import Profile Parameter

- 4 Select the **Use Network Zone** parameter and complete the remainder of the Profile Details section as you normally would.
- 5 Click **Next** and complete the **Normalization** and **Validation Exception Profile** sections as you normally would.
- 6 Click **Next**.  
The **Match Profile** section displays the **By PO Line** match method.



The screenshot shows the 'Import Profile Details' form. At the top, the 'Profile Type' is 'Update Inventory'. Under the 'Match Profile' section, the 'Match method' is 'By PO Line', highlighted with a red oval. The 'Match Actions' section includes: 'Handling method' with radio buttons for 'Automatic' (selected) and 'Manual'; 'Upon match' with radio buttons for 'Merge' (selected), 'Overlay', and 'Use NZ Record'; a 'Merge/Overlay' dropdown menu set to 'Overlay all fields but local'; and checkboxes for 'Allow bibliographic record deletion' and 'Unlink bibliographic'.

Figure 28: By PO Line Match Method

- 7 Complete the remainder of the import profile as you normally would.

## Linking PDA Load Records to the Network Zone

### PERMISSIONS:

- Purchasing Operator
- Purchasing Manager

Libraries can use an institution-level PDA program in the context of the Collaborative Network. Candidate bibliographic records can be imported from the Institution Zone and uploaded or linked to the Network Zone bibliographic records.

### To set a PDA load profile to use records linked to the Network Zone:

- 1 On the Patron Driven Acquisitions (PDA) List page (**Acquisitions > Advanced Tools > Patron Driven Acquisitions (PDA)**), select one of the following:
  - the **Add PDA** button to create a new profile with records linked to the Network Zone
  - **Actions > Duplicate** in the row of the existing profile to which you want to add this feature

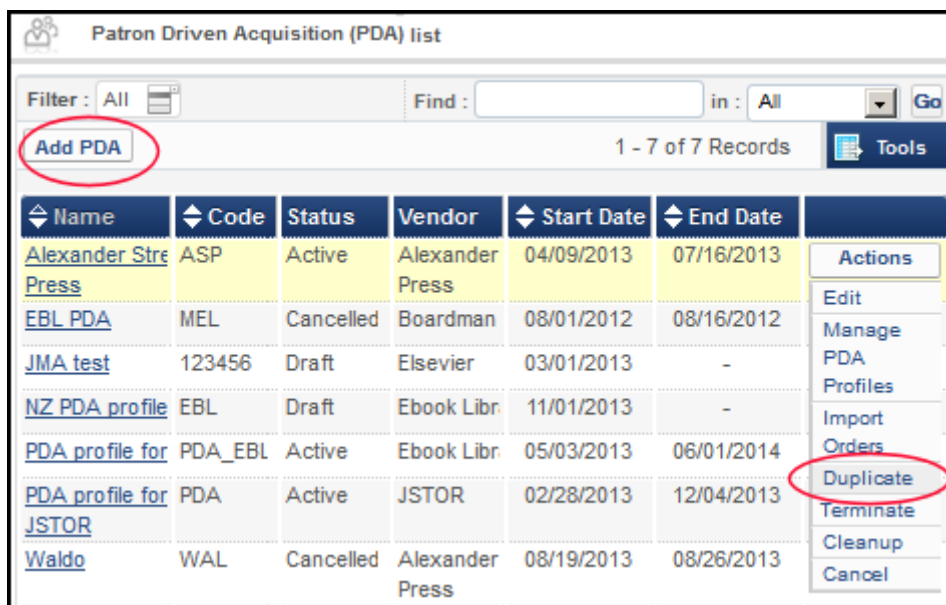


Figure 29: Add or Duplicate a PDA

The PDA Details page opens.

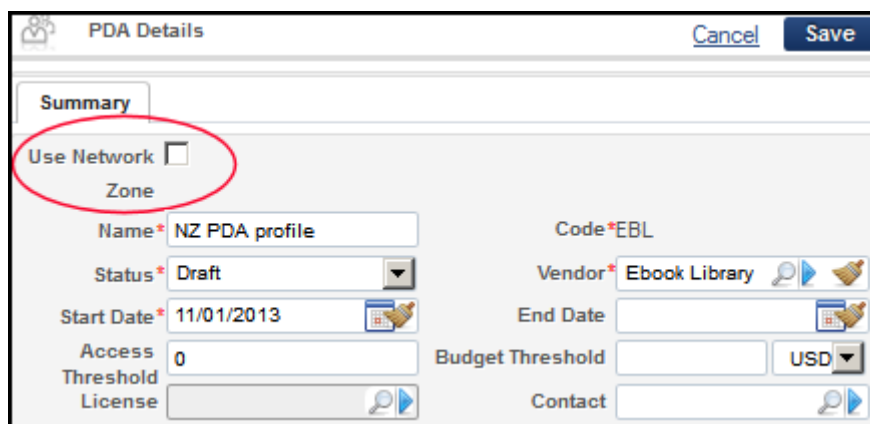


Figure 30: Use Network Zone on PDA Details Page

- 2 Enter any required information in the fields.
  - 3 To link loaded records to the Network Zone, select the **Use Network Zone** check box.
  - 4 Click the **Save** button to save your edits (**Cancel** to discard the change).
- The PDA load profile now links bibliographic records to the Network Zone.

---

## Central License Negotiation

Alma supports managing vendor license negotiations by the collaborative network central office on behalf of collaborative network members.

### *License Coverage*

The negotiation is managed in the Network Zone, where the central office creates a license of the type Negotiation, which includes:

- Negotiation details
  - Member for which the license is being negotiated
  - Member contact email
  - Price
  - Currency
  - License start/end date
  - Note
- License content
  - Electronic collections
  - Titles that are part of the negotiation

The license content is managed centrally in the Network Zone electronic inventory with appropriate group settings representing the member for which the license content has been created.

The license content should be associated with the central license.

- License terms of use: managed in the central license

Members for whom a license is negotiated can purchase the centrally managed content according to the license's negotiated details.

### *Setting Up a Negotiated License*

---

#### **PERMISSIONS:**

The following role can manage a collaborative network license:

- License Manager for the Network Zone
-

**To set up this license:**

- 1 Log on to the Network Zone for your collaborative network.
- 2 From the Licenses and Amendments page (**Acquisitions > Acquisitions Infrastructure > Licenses**), click the **Add License** button.

The License Details page opens to the Summary.

Figure 31: Summary Page of Wizard

- 3 Enter information on the License Details Summary page. See **Adding a License** in the *Alma Acquisitions Guide* for detailed information about the fields.
- 4 Because this is a Network Zone license, the field **License type** appears with two options, Negotiation or License (see figure below). Select **Negotiation**.

Figure 32: License Type Fields for Network Zone

- 5 When you finish entering information in the fields, click **Save**. The license is saved and you are returned to the list of licenses.
- 6 Find the license you just created in the list.
- 7 Select **Actions > Edit** to open all the tabs of your license.

Standard license tabs appear on the page as well as the Negotiation Details tab.

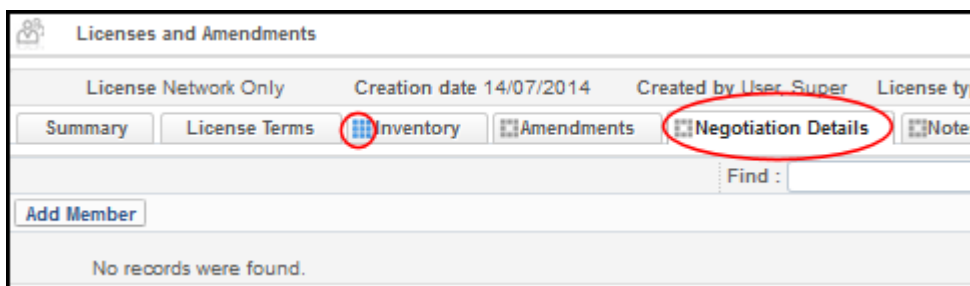


Figure 33: Negotiation Details Tab for Network Zone License

To set the terms of the license, see [Adding a License](#) in the *Alma Acquisitions Guide*.

#### NOTE:

If content has been entered on a tab for this page, the gray box turns bright blue as an indicator, as in the Inventory tab in [Figure 33](#).

- 8 Add members to the license (see below).

#### To add members to the license:

- 1 From the Licenses and Amendments page, Negotiation Details tab (see above), click the **Add Member** button.

The Member Summary page opens.

 A screenshot of the 'Member Summary' page. The page title is 'Summary' with a gear icon on the left and a 'Cancel' button with a question mark icon and a 'Save' button on the right. Below the title, there are fields for 'License test', 'Creation 21/07/2014 date', 'Created by Friedman', and 'License type Neg'. The main content area has a 'Summary' tab highlighted in blue. Below the tab, there are several input fields: 'Member' (with a search icon), 'Member's Contact Email', 'Price' (with a 'USD' dropdown), 'Renewal cycle' (with a '1 Year' dropdown), 'Start date' (with a calendar icon), and 'End date' (with a calendar icon). At the bottom right, there are 'Cancel' and 'Save' buttons.

Figure 34: Member Summary Page

- 2 To select a member institution, click the search or arrow icon in the **Member** field and choose an option from the list.
- 3 Enter any additional details for the license.
- 4 Click **Save**.

The Network Zone Setup page opens (two members added in the figure below).

	Name	Code	URL
1	Western State	WST	http://il-ucorp.exlibrisgroup.com:1807/
2	Eastern State	EST	http://il-ucorp.exlibrisgroup.com:1807/

Figure 35: Network Zone Setup

To complete the Network Zone setup, ensure that the vendor collection is associated with the appropriate group setting for the institutions as well as with the license.

For information on working with group settings in a collaborative network, see [Configuring Inventory Available For Management Groups for Collaborative Environments](#).

## Order Electronic Resources Negotiated and Managed in the Network Zone by Member

Collaborative network members can purchase electronic resources that are negotiated and managed for them by the central office in the Network Zone. Before they can do this, the central office of the Network Zone must create a Negotiation license and make it available to the institution. The Negotiation license must have an entry for the current member, and the resource must also be linked to the Negotiation license.

The member should be listed in the negotiation details as a member for this license.

**VIDEO:**

For more information about ordering electronic resources negotiated and managed by the center office in the Network Zone, see the *Order E-Resources Negotiated and Managed in the NZ by a Member* video (9:35 mins).

See **Central License Negotiation** on page 35 for information on setting up a Negotiated license.

**Network Zone****PERMISSIONS:**

The following role can associate an electronic resource with a Negotiated license:

- License Manager (for the Network Zone)

**To associate an electronic resource with a Negotiated license:**

- 1 Perform a repository search for the electronic collection or portfolio you want the license to incorporate.

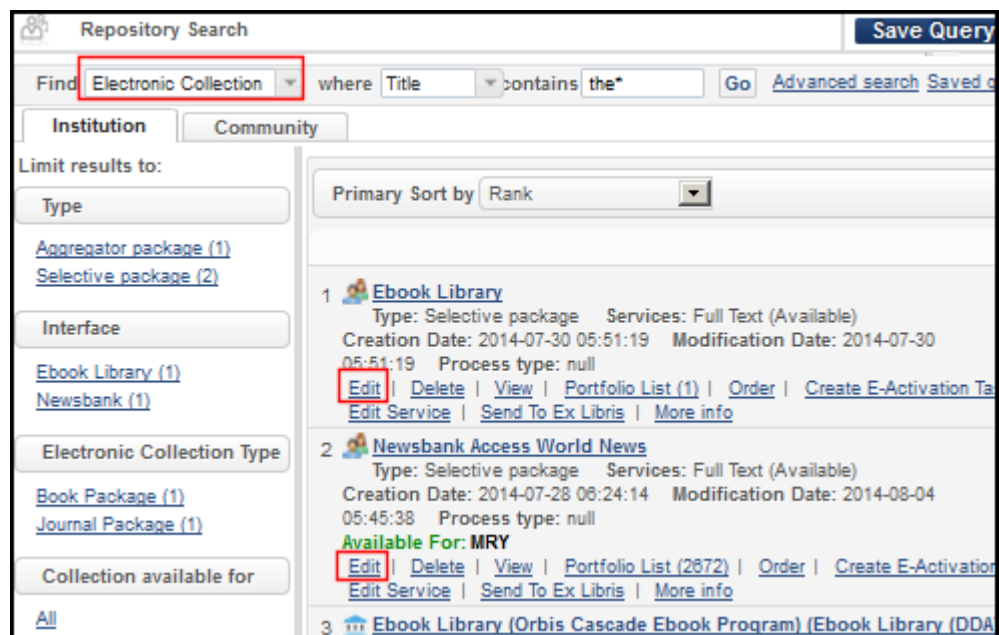


Figure 36: Edit Option for Results of Search

- 2 Click **Edit** for the entry you want to associate with the license. The Editor page for the electronic collection or portfolio opens (see below).

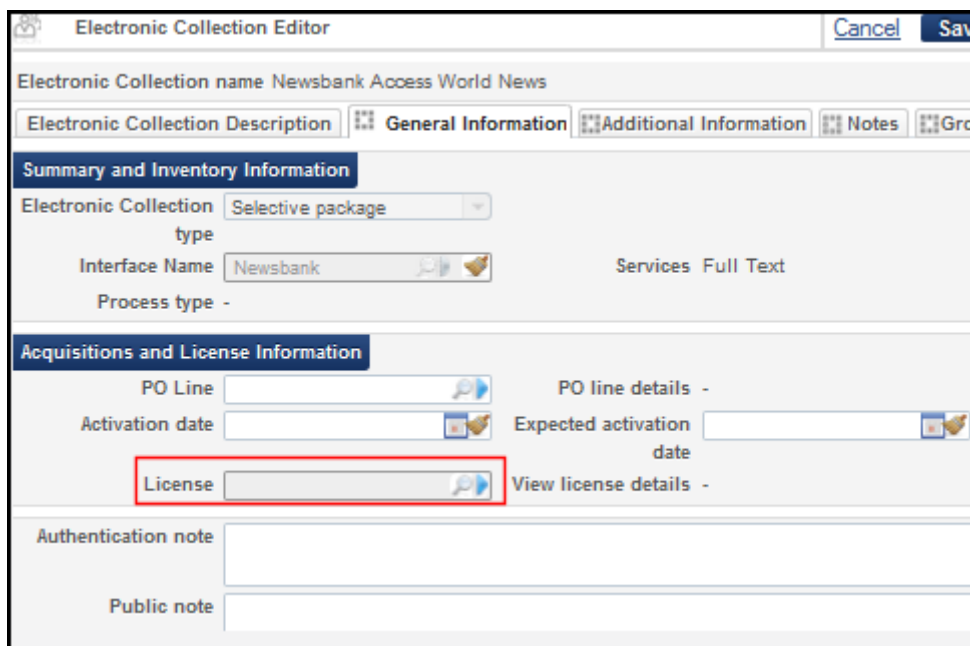


Figure 37: License Field on General Information Tab

- 3 In the Acquisitions and License Information section, click the search/find icon (magnifying glass/arrow) for the **License** field.  
The list of all licenses opens.



Figure 38: Select Negotiation License

- 4 Find the license you want to use for this resource and select its button. The license must be of the type Negotiation.
- 5 Click **Select**.  
The license you selected populates the License field.



- 6 Enter any additional information you want for the Electronic Collection Editor. See **Managing Electronic Collections** in the *Alma Resource Management Guide* for more information.

### *Institution Zone*

---

#### PERMISSIONS:

The following Institution Zone roles can license electronic resources through a Negotiated license:

- Inventory Operator or Manager (Institution Zone/Consortium Member)
- 

#### To purchase a centrally negotiated electronic resource:

- 1 Log on to Alma as an institution that is part of a collaborative network.
- 2 Perform a repository search of the Network Zone. (The resource should be an electronic collection or portfolio, and your institution should be included in the Network Zone license along with the resource. This will have been set by the central office of the collaborative network.)

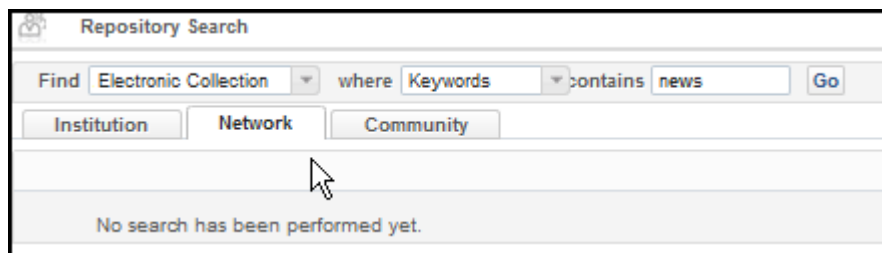


Figure 39: Search of Network Resources

- 3 Find the result entry that contains the resource you want to order and click **Order**.

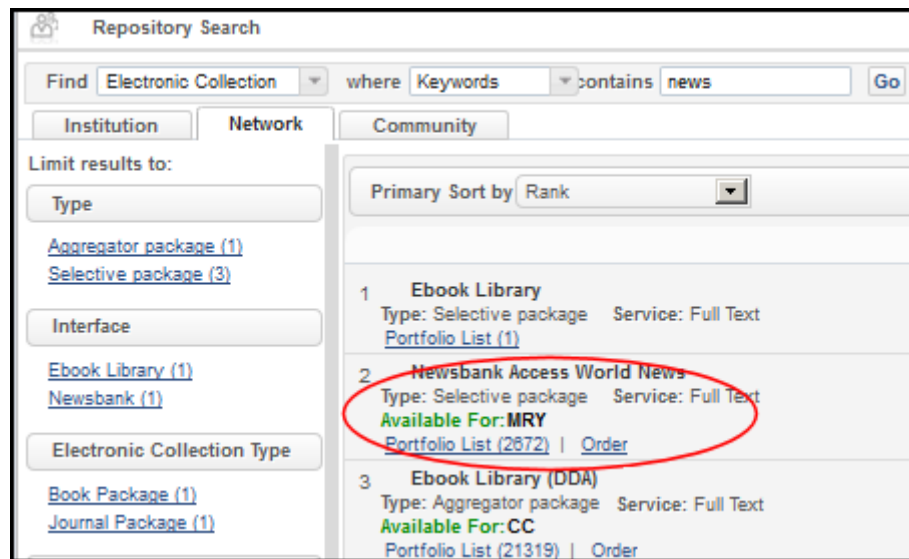


Figure 40: Select Network Resource

---

**NOTE:**

Your institution's name and code should appear in the Collection Available For filter list in the left column and in the Available For notation in the entry, as shown below.

---

The screenshot shows the 'Repository Search' interface. At the top, there is a search bar with 'Electronic Collection' selected, 'Keywords' as the search type, and 'news' as the search term. Below the search bar are tabs for 'Institution', 'Network', and 'Community'. On the left, there are filter sections: 'Limit results to:' with 'Type' (showing 'Aggregator package (1)' and 'Selective package (3)'), 'Interface' (showing 'Ebook Library (1)' and 'Newsbank (1)'), and 'Electronic Collection Type' (showing 'Book Package (1)' and 'Journal Package (1)'). A red circle highlights the 'Collection available for' filter, which is currently set to 'Mary University'. On the right, the search results are displayed, sorted by 'Rank'. The results list four items: 1. 'Ebook Library' (Type: Selective package, Service: Full Text, Portfolio List (1)), 2. 'Newsbank Access World News' (Type: Selective package, Service: Full Text, Available For: MRY, Portfolio List (2672) | Order), 3. 'Ebook Library (DDA)' (Type: Aggregator package, Service: Full Text, Available For: CC, Portfolio List (21319) | Order), and 4. 'AF test' (Type: Selective package, Service: Full Text, Available For: PSU, Portfolio List (1) | Order). Red circles highlight the 'Available For: MRY' and 'Available For: PSU' text in the results.

Figure 41: Institutions That Can Order This Resource

After you select **Order**, the PO Line Owner and Type form opens.

The screenshot shows the 'PO Line Owner and Type' form. At the top, there are 'Cancel' and 'Create PO line' buttons. Below the title bar, there is a 'Tools' button. The main content area displays the following information: '1 Ebook Library (DDA)' with 'Type: Aggregator package' and 'Service: Full Text'. Below this, there is a 'Description \*' field with the value 'Ebook Library (DDA)'. There are three dropdown menus: 'Purchase Type \*', 'PO Line Owner \*', and 'Load from Template'. At the bottom right, there are 'Cancel' and 'Create PO line' buttons.

Figure 42: New PO Line Order Form

- 4 Select entries for the required fields and click the **Create PO Line** button.

The system creates a purchase order for the institution. This PO is linked to the centrally managed inventory in the Network Zone, inventory that shows on the PO line. The inventory tab of the Institution Zone PO line lists the Network Zone inventory to which the PO line is linked.

The inventory on the Network Zone should be Active. It is not editable by the Institution Zone members.

**VIDEO:**

For additional information about ordering e-resources through the Network Zone, see the *Order E-Resources Negotiated and Managed in the NZ by a Member* video.

## Managing Multiple Matches Across Institution and Network Zones

When importing records from the Network Zone to the Institution Zone, multiple matches may occur. To help determine which record to overlay or merge, Alma presents the following information for the matches:

- A held-by indication at the record level that gives information about the Network members that are using the record.
- The MMS ID of the record (for searching for the record in the Network Zone, if necessary)

**To resolve issues of multiple matches:**

- 1 From the Resolve Import Issues page (**Alma > Resource Management > Import > Resolve Import Issues**), locate the match files in question by running a search or using a filter, if necessary.

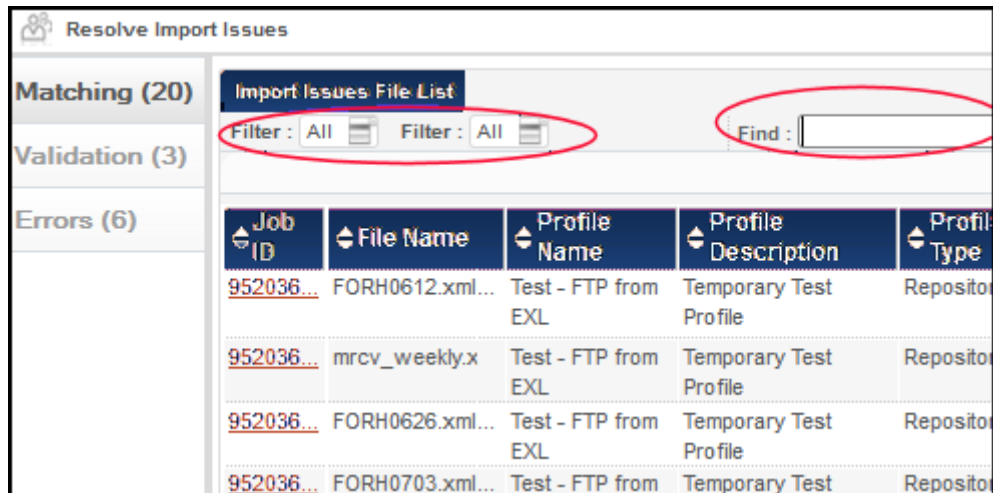


Figure 43: Resolve Import Issues – All Matching IDs

For example, a search using the field **Profile name** might return two rather than twenty results (as seen in the illustrations above and below).

Resolve Import Issues

(20) **Import Issues File List**

Filter : All Filter : All Find : NZmultiple in : Profile name Go

(3) 1 - 2 of 2 Records Tools

Job ID	File Name	Profile Name	Profile Desc	Profile Type	Subm On	# Rec's	# Failed Records	Assg	Actio
<a href="#">24488...</a>	marc_sample_...	NZmultiple	-	Repository	2013-10-2	2	2	-	Actio
<a href="#">24488...</a>	marc_sample_...	NZmultiple	-	Repository	2013-10-2	2	2	-	Actio

Figure 44: Resolve Import Issues – Narrowed by Profile Name

- Click **Edit** from **Actions** drop-down list (far right on the table) for the first issue you want to resolve. The Handle Matching page opens.

Handle Matching [Back](#) [Approve Import](#)

**Import Job Details**

Job ID 2448818130001141 File Name marc\_sample\_001.xml\_1.xml

Profile Name NZmultiple Profile Description -

Profile Type Repository Number of Records 2

Number of Failed Records 2

**Imported Records To Handle**

Filter : All

1 - 2 of 2 Records Tools

Record ID	Author	Short Title	Publisher	Date	Handling Type	
<a href="#">9913593402...</a>	Manask, A	BBBBB	-	2002	Multiple Matches EOD	<a href="#">View</a>
<a href="#">9913593401...</a>	Manask, A	BBBBB	-	2002	Multiple Matches EOD	<a href="#">View</a>

[Back](#) [Approve Import](#)

Figure 45: Handle Matching Import Records

- Click the **View** button corresponding to the record whose matches you want to view. The Import Record Matches page opens.

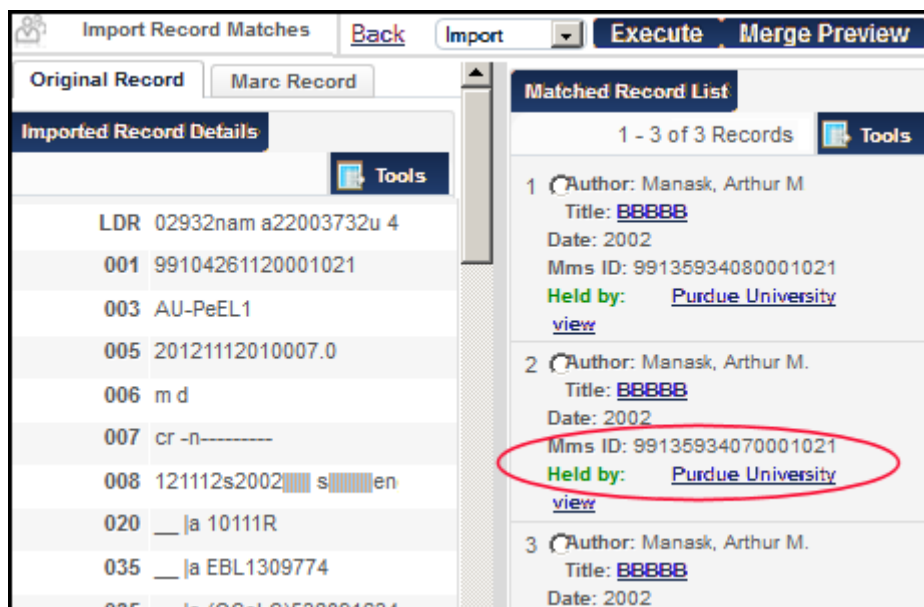


Figure 46: MMS ID and Held by Information in Matched Record List

The original and MARC records can be viewed in the left pane. In the right pane, a list of matched records show with information key to processing them:

- MMS ID, which can be used to search for matching records in the Network Zone
- Held by, which can help you determine which records to overlay, merge, and/or delete.

From here, you can determine a record’s source and holdings, which allows you to make an informed decision regarding how you want to handle the match. Options appear in the menu below the match records (as shown in the following illustration).

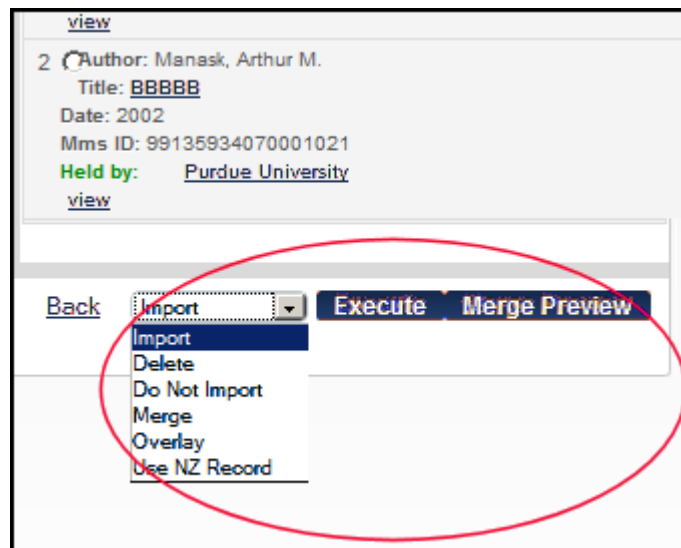


Figure 47: Actions for Matching Records

- 4 Select an action from the drop-down menu and click **Execute** to perform the action or **Merge Preview** to see a preview of the record before performing the merge.

The system processes the record as you directed and returns you to the list of matching records.

## Google Scholar/Primo Central Publishing

Collaborative networks can configure an environment in which each member institution can share electronic resources at the campus/library level. For detailed information, see [Adding a Profile for a Multicampus Configuration](#) in the *Integrations with External Systems Guide*.

## OCLC Publishing

For information regarding OCLC publishing in a collaborative network environment, refer to [OCLC Publishing in a Collaborative Network Environment](#) in the *Alma Integrations with External Systems Guide*.

## Configuring Inventory Available For Management Groups for Collaborative Environments

---

### PERMISSIONS:

The following roles can configure institution inventory network groups:

- Repository Administrator
- General System Administrator

The following role can define availability for electronic collections and/or portfolios:

- Electronic Inventory Operator
- 

In a collaborative environment, electronic resources are managed centrally in the Network Zone. In some cases in the Network Zone, there are requirements to limit access to electronic resources to a certain group of members within the collaborative network. That is, the electronic resources in the Network Zone are not available to all the patrons across the entire collaborative network.

In order to address this requirement and manage which members in the Network Zone have access to the electronic resources, Alma provides the Available For functionality (configurable inventory management group settings). The purpose of inventory management groups is to provide you the capability of limiting access to identified electronic resources.

If resources are available for all members of the network, there is no need to set up management groups or Available For definitions since, by default, active resources are available for all patrons.

---

### VIDEO:

For more information about searching for electronic resources by Available For groups, see the *Search by Available For Groups* video (4:11 mins).

---

For information about searching and working with repository search results for electronic resources managed using Available For, refer to **Working with Jointly Managed E-Resources (Search/Search Results)** on page 82.

A group represents a set of one or more institutions for which you want to manage electronic resources similarly. Group setting characteristics or considerations include the following:

- One or more institutions may be defined in a single group
- One institution can be a part of multiple groups



- Settings should be defined in a manner that eases the management and activation of electronic resources

Groups are assigned to electronic resources using Add Settings for Group (refer to **Adding Group Settings to Electronic Resources** on page 394 in the *Alma Resource Management Guide*).

With the Inventory Network Groups configuration options, you can define groups that you can use to manage access to electronic resources. You can define one or more institutions within a specific group for sharing electronic resources. Refer to the steps below for configuring inventory management groups.

---

**NOTE:**

In order for Inventory Network Groups to display as a configuration option in the Resource Management configuration menu, someone with the General System Administrator role needs to set the parameter value to true for the `multi_campus_inventory_management` parameter in the mapping table located in **Administration > General Configuration > Configuration Menu > General Configuration section > Other Settings**. Before implementing this feature, consult with Ex Libris.

---

**To add an inventory management group:**

- 1 On the Inventory Available For Management Groups page (**Resource Management > Resource Configuration > Configuration Menu > General > Inventory Network Groups**), click **Add Group**. The Add Group dialog box opens.
- 2 Assign a name to the group, optionally enter a description, and click **Add and Close**.

Figure 48: Add Group

The Inventory Available For Management Groups page displays the group that you added.

- 3 Select **Actions > Edit** for the group you added. The Inventory Management Group Details page is displayed.

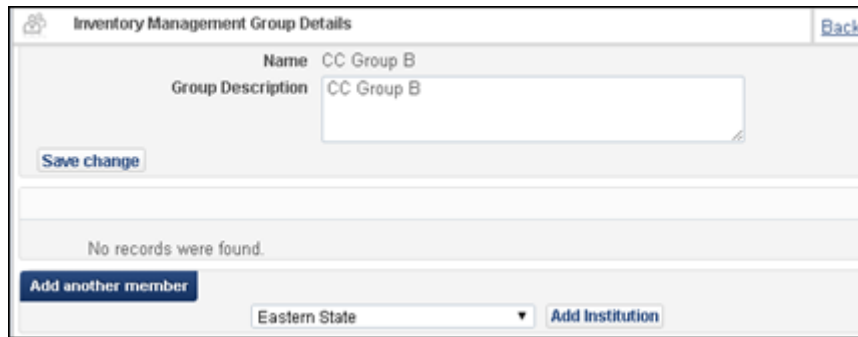


Figure 49: Inventory Management Group Details Page

- 4 Select one of the previously defined institutions and click **Add Institution**. The institutions are added to the list of group members.

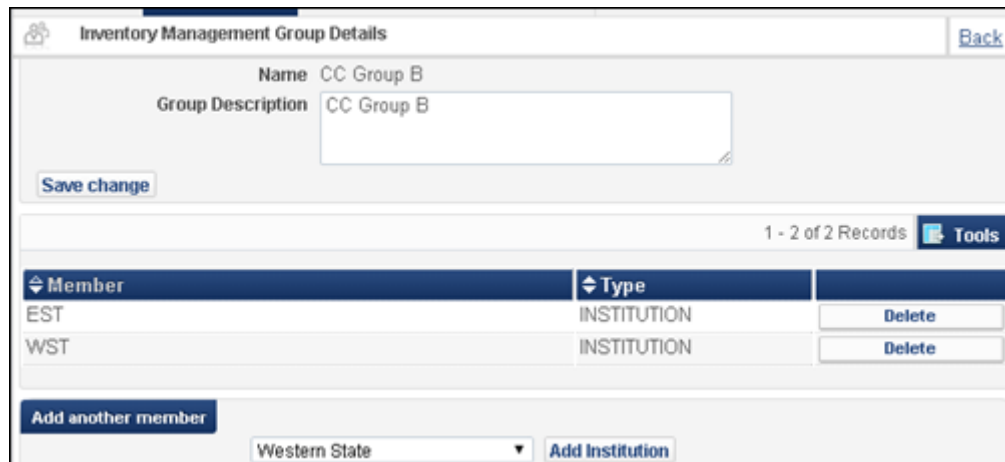


Figure 50: Group List

- 5 Continue adding institution members until the group is complete. When you are finished, click **Back** to return to the Inventory Available For Management Group Details page.

**IMPORTANT:**

It is strongly recommended that you do not delete Available For groups after they are set and associated with inventory. If you delete an Available For group that is connected to inventory, the relevant Available For setting in the inventory is also deleted. Available For group association with inventory is done via an internal ID; and once it changes (such as when groups are deleted), the association will not be kept. Refer to **Adding Group Settings to Electronic Resources** on page 394 in the *Alma Resource Management Guide* for more information regarding associating Available For groups with inventory.

## Inherited Group Settings

For Network Zone (or multicampus) environments that have group settings defined, the electronic collection, service, and portfolio editors display Available For inherited group settings from the higher level. That is, portfolios inherit from services and services inherit from collections. The inherited group settings are listed after the Available For heading.

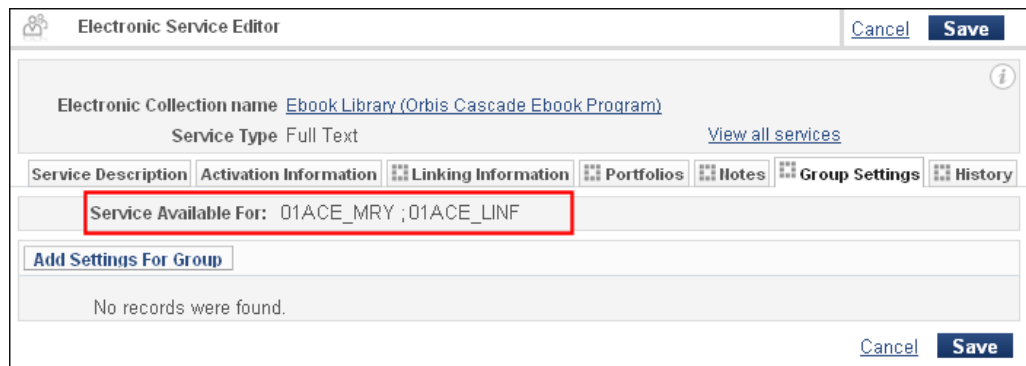


Figure 51: Inherited Available For Group Settings

In the example shown above, the group settings are inherited from the electronic collection in which they were defined (see below).

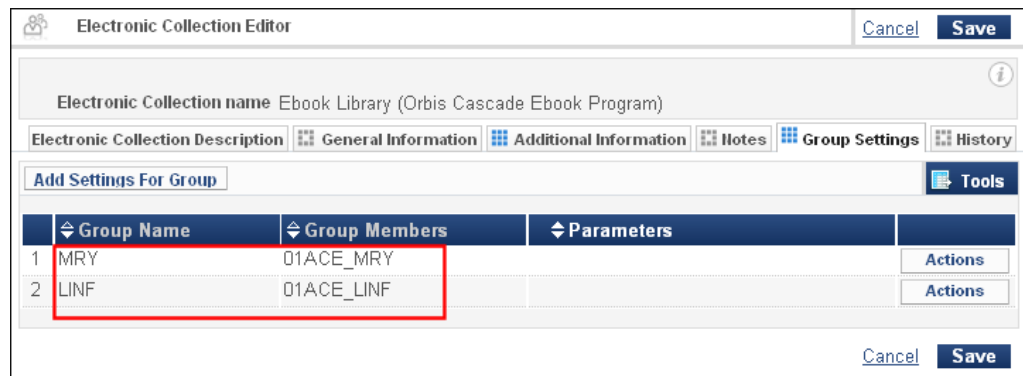


Figure 52: Inherited Group Settings Defined

See below for an example of one of the portfolios that has inherited group settings from this same definition.

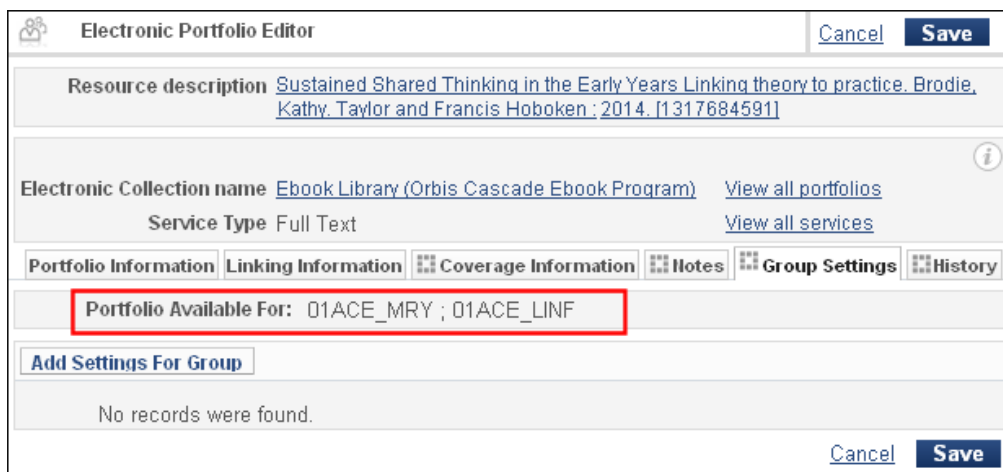


Figure 53: Inherited Group Settings for a Portfolio

**VIDEO:**

For additional information regarding Inherited Available For Groups, refer to the *E-Resources: Inherited "Available For" Groups* video.

## Defining Display Logic Rules at the Campus Level

**PERMISSIONS:**

The following roles are required to update display logic rules:

- Fulfillment Administrator
- General System Administrator

For multicampus environments (**multi\_campus\_inventory\_management = true** in the CustomerParameters mapping table), Alma allows you to define display logic rules at the campus level for the following electronic services: full text, selected full text, database services, and general electronic services. Alma applies the display logic rules in multicampus environments as follows:

- The campus for which the services are calculated is based on the IP address from which the patron triggers the Alma Services page or the campus affiliation of the logged-in patron. If Alma determines that a patron is logged on at a different campus, the calculated electronic services are based on the display logic rules defined for both campuses.
- Display logic rules that are enabled at the campus level override all electronic display logic rules enabled at the institution level.

- For non-electronic services, Alma also applies the display logic rules that are enabled at the institution level.
- If no campus-level display logic rules are enabled, Alma applies all display logic rules that are enabled at the institution level.

**NOTE:**

It is a known issue that display logic rules are not supported at the campus level when the campus parameter is included in an OpenURL. This will be resolved in a later release.

**To define display logic rules at the campus level:**

- 1 On the Fulfillment Configuration page (**Fulfillment > Fulfillment Configuration > Configuration Menu**), click **Display Logic Rules** under **Discovery Interface Display Logic**.

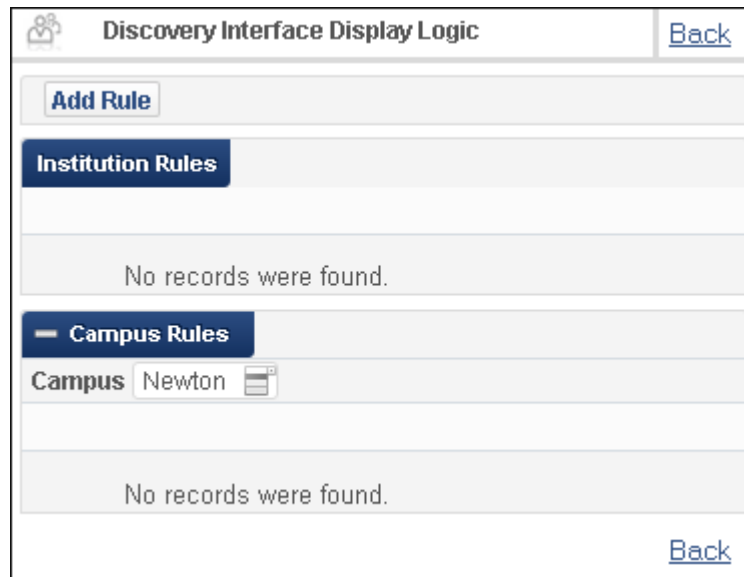


Figure 54: Discovery Interface Display Logic Page

- 2 Click **Add Rule**.

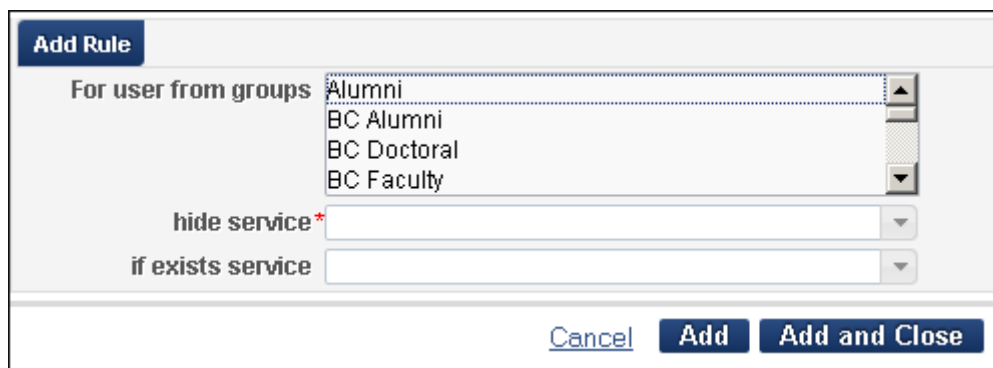


Figure 55: Add Rule Dialog Box

- 3 Select one of the following electronic services from the hide service drop-down list: **DB Service**, **Full Text**, **General Electronic Service**, or **Selected Full Text**.

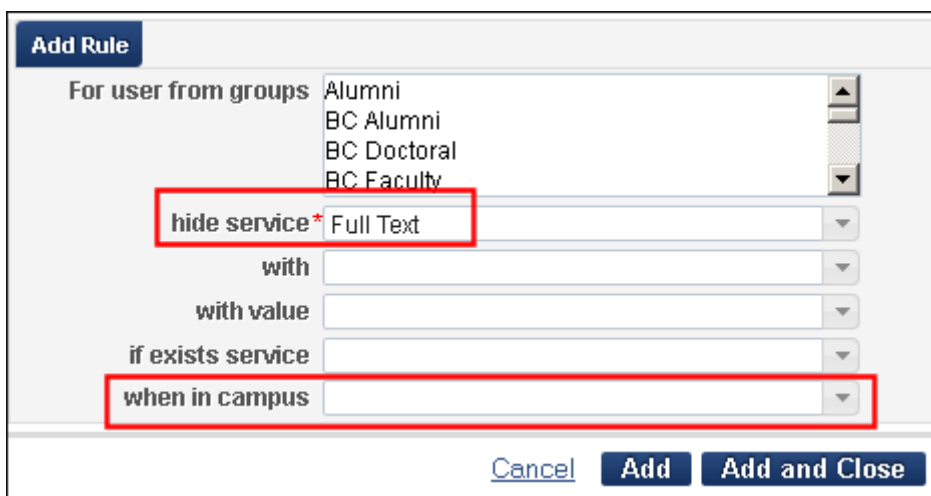


Figure 56: Electronic Service Selected

- 4 Select a campus from the **when in campus** drop-down list
- 5 Fill out the remaining fields and click **Add and Close**.

The Add Rule dialog box closes, and the new rule is added under the Campus Rules section on the Discovery Interface Display Logic page.

Discovery Interface Display Logic [Back](#)

[Add Rule](#)

**Institution Rules**

No records were found.

**— Campus Rules**

**Campus** Newton

1 - 1 of 1 Records [Tools](#)

Active	Move Up	Move Down	Rule Description	
1	<input checked="" type="checkbox"/>		For user groups Visitor: Hide service Full Text with Interface = Berkeley Electronic Press if exists service Booking Request when in campus Newton	<a href="#">Remove</a>

[Back](#)

Figure 57: Rule Added to Campus Rules Section

To view rules for another campus, select the campus from the **Campus** drop-down filter.

## Shared Vendor Information

Global vendor information can be shared between the Network Zone of and member institutions. This alleviates the need for the member institutions to add vendor information independently. Each member of the collaborative network can define its own local parameters for its vendors.

The **Distribute Network Acquisition Changes to Members** job distributes the new vendor information that has been added to the Network Zone to member institutions. The job copies all vendors that have been added to the Network Zone since the date set by the `acq_distribute_changes_last_run` parameter (**Acquisitions > Acquisitions Configuration > Configuration Menu > General > Other Settings**). If the parameter is empty, all vendors in the Network Zone are copied to the member institutions.

Only global attributes are distributed from the Network Zone. These attributes cannot be configured on the local level. Local attributes (such as vendor account, EDI information, access provider, and vendor interface) are not distributed from the Network Zone. These attributes can be configured on the local level. Because the vendor account, access provider, and vendor interface are not distributed to member institutions, the vendor is inactive in the member institution until these attributes are added and the vendor is activated.

If a vendor that exists in a member institution is added to the Network Zone, the first time the job runs, the job changes the vendor to a shared vendor and adds the global attributes (such as contact information), but does not change the local attributes. Subsequently, runs of the job leave the vendor as local (not shared).

**VIDEO:**

For more information about working with shared vendors in a collaborative network, see the *Shared Vendors in the Network* video (6:44 mins).

**PERMISSIONS:**

The following roles are required to update display logic rules:

- Acquisitions Administrator
- General System Administrator

**To configure this feature:**

- 1 On the Acquisitions Configuration page (**Acquisitions > Acquisitions Configuration > Configuration Menu > General > Other Settings**), click **Customize** for the `acq_distribution_job` and change the parameter value to **True**.

Mapping Table					
You are configuring: Alma University					
Table Information					
Sub System		INFRA	Table Name		Customer Parameters
Updated By		-	Last Updated		-
Table Description		Customer Parameters			
Mapping Table Rows					
	parameter key	parameter module	parameter value	free text description	
1	acq_distribute_changes_last_run	acquisition		Last run time of the job	Customize
2	acq_distribution_job	acquisition	true		Customize
3	acquisition_accrual_mode	acquisition	false		Customize
4	assertion_over_po_line_price	acquisition	500		Restore
5	auto_claim	acquisition	Y	Send Claim notification	Customize
6	expended_from_fund_default	acquisition	true		Customize
7	exportPrepaidInv	acquisition	false	Invoice to be exported to	Customize
8	handle_invoice_payment	acquisition	true		Customize
9	invoice_allow_vat_in_line_level	acquisition	true		Restore

Figure 58: Acquisition Configuration Parameters

- 2 Click **Save**.



**NOTE:**

For more information, see [Configuring Other Settings](#) in the *Alma Acquisitions Guide*.

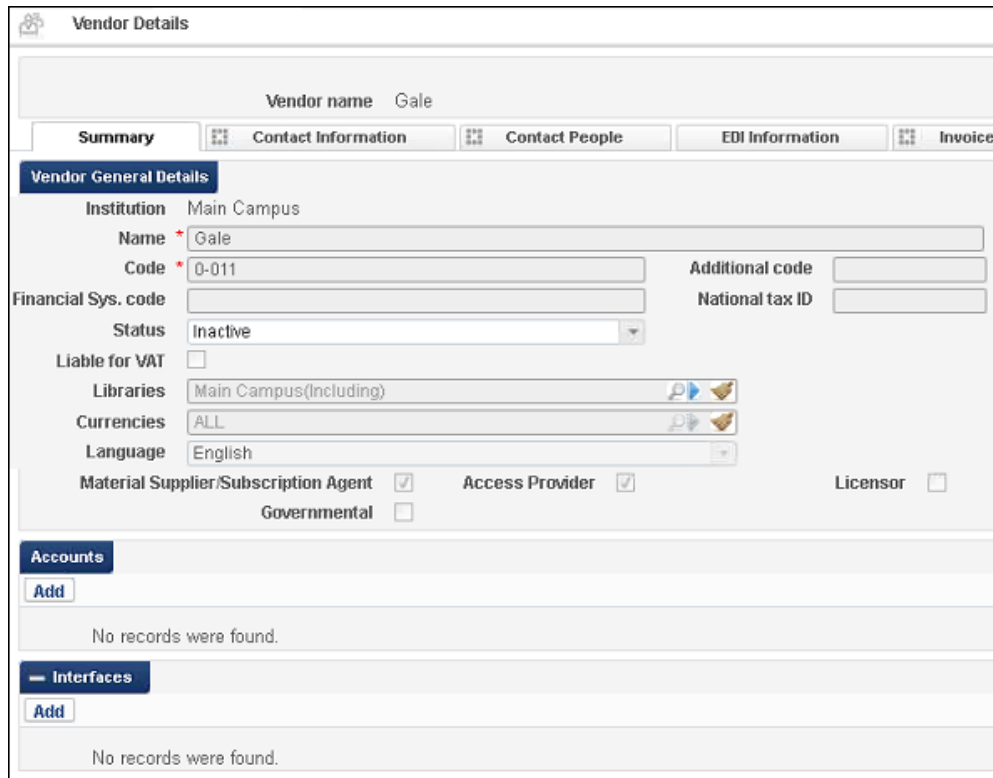
**To run the Distribute Network Acquisition Changes to Members job:**

- 1 In the list of scheduled jobs, activate **Distribute network acquisition changes to members**. For more information, see [Distribute Central Resource Sharing Configuration](#) in the *Alma Administration Guide*.
- 2 View the list of vendors (**Acquisitions > Acquisitions Infrastructure > Vendors**). The new Shared column indicates which vendors are shared by member institutions. Newly shared vendors are inactive.

	Shared	Active	Vendor Code	Name	Vendor Type	Libraries	
1	✓	✓	<a href="#">0-011</a>	Gale	Access Provider	Main Campus(Including)	<a href="#">Edit</a>
2	✓	✓	<a href="#">0-012</a>	Elsevier	Material Supplier	Main Campus(Including)	<a href="#">Edit</a>
3	✓	✓	<a href="#">0-013</a>	JSTOR	Material Supplier	Main Campus(Including)	<a href="#">Edit</a>
4	✓	✓	<a href="#">010</a>	Angus and Baker	Material Supplier	Main Campus(Including)	<a href="#">Edit</a>
5	✓	✓	<a href="#">0-135</a>	National Booksellers	Material Supplier	Main Campus(Including)	<a href="#">Edit</a>
6	✓	✓	<a href="#">0-150</a>	Boardman	Material Supplier	Main Campus(Including)	<a href="#">Edit</a>
7	✓	✓	<a href="#">0-160</a>	Wiley	Material Supplier	Main Campus(Including)	<a href="#">Edit</a>
8	✓	✓	<a href="#">0415-WYLIE</a>	Wylie publishers	Material Supplier	Main Campus(Including)	<a href="#">Edit</a>
9	✓	✓	<a href="#">18E EEUW</a>	EEUW Booksellers	Material Supplier	Main Campus(Including)	<a href="#">Edit</a>
10	✓	✓	<a href="#">A0172</a>	John Jones Publishing Ltd	Material Supplier	Main Campus(Including)	<a href="#">Edit</a>

Figure 59: Shared Vendor Column

- 3 Click **Edit** for a shared vendor. Global attributes are non-editable



**Vendor Details**

Vendor name Gale

Summary | Contact Information | Contact People | EDI Information | Invoice

**Vendor General Details**

Institution: Main Campus

Name: Gale

Code: 0-011

Financial Sys. code:

Status: Inactive

Liabable for VAT:

Libraries: Main Campus(Including)

Currencies: ALL

Language: English

Material Supplier/Subscription Agent:     Access Provider:     Licensor:

Governmental:

**Accounts**

Add

No records were found.

**Interfaces**

Add

No records were found.

Figure 60: Global Attributes

## Centralized Management of Configuration Tables

### PERMISSIONS:

The roles that allow you to perform configurations for the various functional areas can access this feature.

Institutions that administer the Network Zone in a collaborative network can perform configuration changes and distribute them automatically to member institutions. This allows for easier coordination between member institutions and reduces duplication of effort.

Both configuration tables that are configured at the table level and configuration tables that are configured at the row level can receive customizations from the Network Zone.

The following conditions apply:

- If a member institution performs a customization in a configuration table, changes from the Network Zone do not overwrite the changes to the configurations for that row or table.
- If a member institution does not want to receive customization changes from the Network Zone, it can customize the row or table (without necessarily changing any data), which will block it from receiving Network Zone customizations.
- If a member institution later decides to receive customizations from the Network Zone, it can click **Restore**, which changes the configurations for that row or table to the Network Zone configurations and allows that row or table to receive Network Zone configurations in the future.
- If a member institution that has customized a row or table that is managed by the Network Zone wants to return the settings of that row or table to the original settings before any customizations (OTB), it must do so manually (that is, the **Restore** button does not have this functionality for rows and tables managed by the Network Zone).
- If a Network Zone administrator clicks **Restore** and **Save and Distribute** for a row or table, the settings in the member institution are restored to the original settings before any customizations (OTB) of that row or table.
- If a Network Zone administrator clicks **Stop Network Management**, changes performed in the Network Zone are no longer distributed to member institutions. This action leaves member institution data unchanged, that is, a restore is not preformed.
- Despite all of the above, when distributing a table, the Network Zone can select to force the distribution to the member institution, overriding all changes made in the member institution.

The **Distribute Network Zone configuration table changes to member institutions** job distributes any changes made to the Network Zone to the member institutions.

---

**NOTE:**

Currently this functionality is only available for select configuration tables.

---

The workflow is different depending on whether the configuration table is one that is configured at the table level or the row level.

**To centrally manage configuration tables configured at the row level:**

- 1 From the Network Zone, select a configuration table that is configured at the row level.
- 2 Select **Customize > Actions > Manage in Network** for the row that you want to manage in the Network Zone.

The screenshot shows the 'Mapping Table' configuration page for 'Orbis Cascade Network Zone'. It includes a 'Table Information' section with fields for Sub System (DATA\_MODEL), Table Name (Object Type Search Index Codes), and Table Description (Object Type Search Index Codes). Below is a 'Mapping Table Rows' table with 7 rows. Each row has columns for Enabled (all checked), Index Code, Simple Search?, Adv. Search?, Managed in Network, and Updated By. Row 4, 'activateFrom', has a green checkmark in the 'Managed in Network' column. An 'Actions' menu is visible for row 4, with 'Manage in Network' and 'Restore' options highlighted.

	Enabled	Index Code	Simple Search?	Adv. Search?	Managed in Network	Updated By	
1	✓	accessionNumber	true	true		-	Customize
2	✓	acquisition_note	true	true		-	Customize
3	✓	action_note	false	true		-	Customize
4	✓	activateFrom	false	true	✓	-	Actions
5	✓	activateTo	false	true		-	Manage in Network Restore Customize
6	✓	additional_physical	false	true		-	Customize
7	✓	aggregator	false	true		-	Customize

Figure 61: Row Configuration Table

A green check mark appears in the **Managed in Network** column of the row, indicating that the row is managed by the Network Zone.

This screenshot is identical to Figure 61, but the 'Save and Distribute' button is visible in the top right corner. The 'Managed in Network' column for row 4 now contains a green checkmark, and the 'Actions' menu is no longer visible for that row.

	Enabled	Index Code	Simple Search?	Adv. Search?	Managed in Network	Updated By	
1	✓	accessionNumber	true	true		-	Customize
2	✓	acquisition_note	true	true		-	Customize
3	✓	action_note	false	true		-	Customize
4	✓	activateFrom	false	true	✓	-	
5	✓	activateTo	false	true		-	Customize
6	✓	additional_physical	false	true		-	Customize
7	✓	aggregator	false	true		-	Customize

Figure 62: Managed in Network

- 3 Perform any customizations that you want to distribute to member institutions.
- 4 Click **Save** to save the configuration changes without distributing them to member institutions or click **Save and Distribute** to save the configuration changes and distribute them. If you click **Save and Distribute**, click

**Confirm** in the confirmation dialog box to run the job that distributes the changes to member institutions.

The configuration changes are distributed to the member institutions when the job runs. *Network* is displayed in the **Updated By** column both in the Network Zone and the member institution.

- 5 To stop centralized management of configuration tables, click **Stop Network Management** for the row, and then click **Save and Distribute** and **Confirm** in the confirmation dialog box.

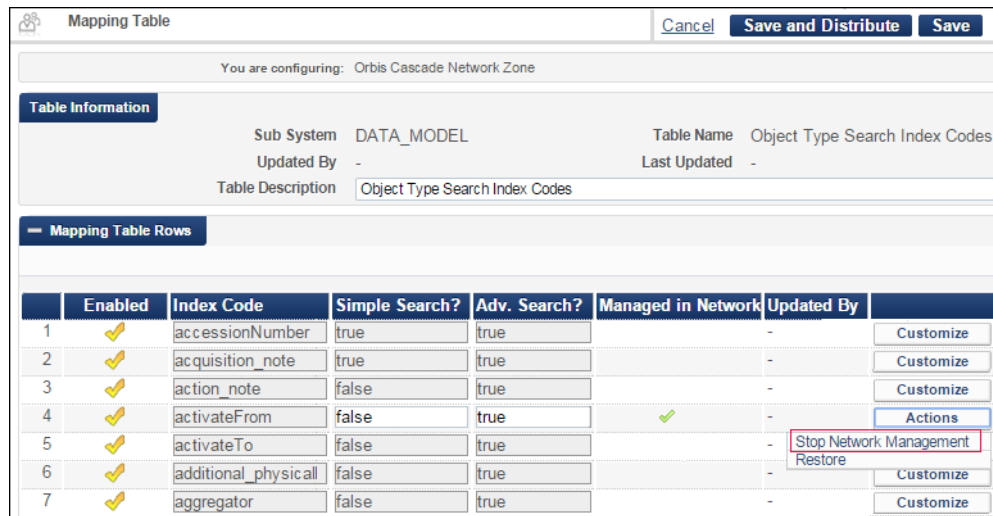


Figure 63: Stop Network Management

Configuration changes performed in the Network Zone are no longer distributed to member institutions.

To centrally manage configuration tables configured at the table level:

- 1 From the Network Zone, select a configuration table that is configured at the table level:.

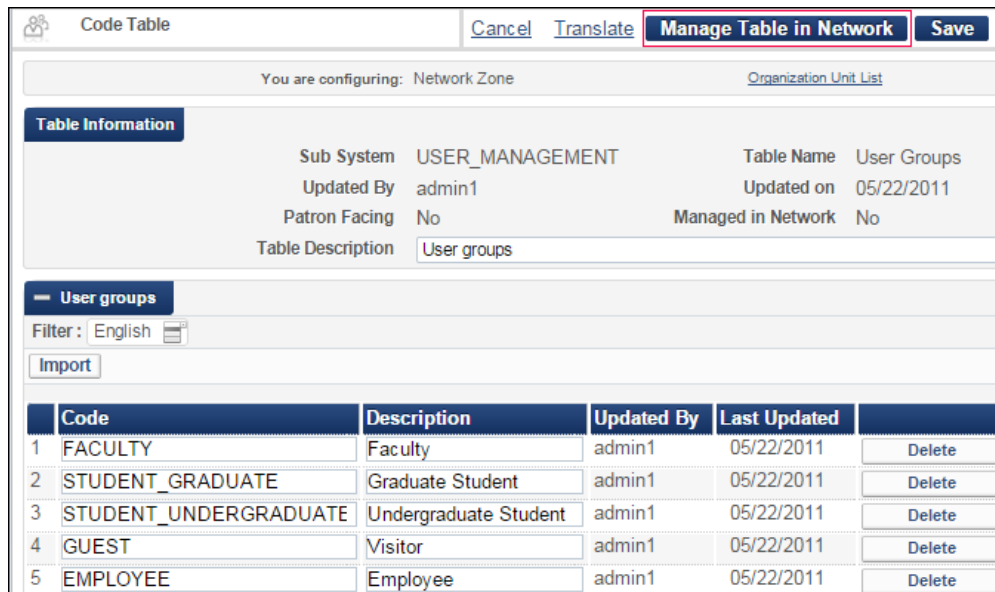


Figure 64: Table Configuration

- 2 Click **Manage Table in Network**.

The value for the **Managed in Network** field changes to **Yes** and the **Stop Network Management** and **Save and Distribute** buttons are displayed:

The screenshot shows the 'Code Table' configuration page for 'User Groups'. At the top, there are buttons for 'Cancel', 'Translate', 'Stop Network Management', 'Save and Distribute', and 'Save'. Below this, it indicates 'You are configuring: Network Zone' and provides a link to 'Organization Unit List'. The 'Table Information' section shows: Sub System: USER\_MANAGEMENT, Table Name: User Groups, Updated By: admin1, Updated on: 05/22/2011, Patron Facing: No, Managed in Network: Yes (highlighted with a red box), and Table Description: User groups. Below this is a section for 'User groups' with a filter set to 'English' and an 'Import' button. A table lists the user groups with columns for Code, Description, Updated By, Last Updated, and a Delete button.

Code	Description	Updated By	Last Updated	
1	FACULTY	admin1	05/22/2011	Delete
2	STUDENT_GRADUATE	admin1	05/22/2011	Delete
3	STUDENT_UNDERGRADUATE	admin1	05/22/2011	Delete
4	GUEST	admin1	05/22/2011	Delete
5	EMPLOYEE	admin1	05/22/2011	Delete

Figure 65: Managed in Network

- 3 Perform any customizations that you want to distribute to the member institutions.
- 4 Click **Save** to save the configuration changes without distributing them to member institutions or click **Save and Distribute** to save the configuration changes and distribute them. If you click **Save and Distribute**, a dialog box appears.

The dialog box is titled 'Confirm' and asks: 'Are you sure you want to save and distribute all Network managed data to all members?'. Below the question is a 'Distribution mode' dropdown menu currently set to 'Do not override memb'. At the bottom right are 'Cancel' and 'Confirm' buttons.

Figure 66: Distribute Table to Network Members Confirmation Dialog Box

- a In **Distribution Mode**, optionally select **Override Member Institution Customization** to force the table to be distributed to all member institutions, even the ones that made local customizations in the table.
- b Click **Confirm** to run the job that distributes the changes to member institutions.

The configuration changes are distributed to the member institutions. The value for the **Managed in Network** field changes to **Yes** and the value in the **Updated By** column changes to **Network** in the member institutions.

- 5 To stop centralized management of configuration tables, click **Stop Network Management**, and then click **Save and Distribute** and **Confirm** in the confirmation dialog box:

The screenshot shows the 'Code Table' configuration page for 'User Groups'. The 'Stop Network Management' button is highlighted with a red box. Below the table information, there is a section for 'User groups' with a filter set to 'English' and an 'Import' button. A table lists five user groups with their codes, descriptions, updated by, last updated, and delete buttons.

	Code	Description	Updated By	Last Updated	
1	FACULTY	Faculty	admin1	05/22/2011	Delete
2	STUDENT_GRADUATE	Graduate Student	admin1	05/22/2011	Delete
3	STUDENT_UNDERGRADUATE	Undergraduate Student	admin1	05/22/2011	Delete
4	GUEST	Visitor	admin1	05/22/2011	Delete
5	EMPLOYEE	Employee	admin1	05/22/2011	Delete

Figure 67: Stop Network Management

Configuration changes performed in the Network Zone are no longer distributed to member institutions.

#### VIDEO:

For a video on **Centralized Management of Configuration Tables**, see the *Centralized Management of Configuration Tables* video.

## Centralized Management of Notification Letters

#### PERMISSIONS:

To access this feature, you must have one of the following roles:

- General System Administrator
- Letter Administrator

Alma produces a variety of letters as a means of notification. Institutions that administer the Network Zone in a collaborative network can customize notification letter templates and distribute them automatically to member institutions in a collaborative network. This allows for easier coordination between member institutions and reduces duplication of effort.



The following conditions apply:

- If a member institution customizes a letter, changes from the Network Zone do not overwrite the changes to the letter.
- If a member institution does not want to receive customization changes from the Network Zone, it can customize the letter (without necessarily changing any data), which blocks it from receiving Network Zone customizations.
- If a member institution later decides to receive customizations from the Network Zone, it can perform a restore, which changes the configurations for the letter to the Network Zone customizations and allows that letter to receive Network Zone configurations in the future.
- If a member institution customizes a letter that is managed by the Network Zone and wants to return the settings of that letter to the original settings before any customizations (OTB), it must do so manually (the **Restore** button does not have this functionality for letters managed by the Network Zone).
- If a Network Zone administrator clicks **Restore** and **Distribute** for a letter, the settings in the member institution are restored to the original settings before any customizations (OTB) of that letter if the member institution did not perform any customizations.
- If a Network Zone administrator clicks **Stop Network Management** and **Distribute**, changes performed in the Network Zone are no longer distributed to member institutions. This action leaves member institution data unchanged—that is, a restore is not performed.
- The **Distribute Network Letter Template Changes to Members** job distributes any changes made to letters in the Network Zone to the member institutions.

To access this feature:

- 1 From the Network Zone, select the letter template that you want to distribute to member institutions (**Administration > General Configuration > Configuration Menu > General Configuration > Customize Letters**):

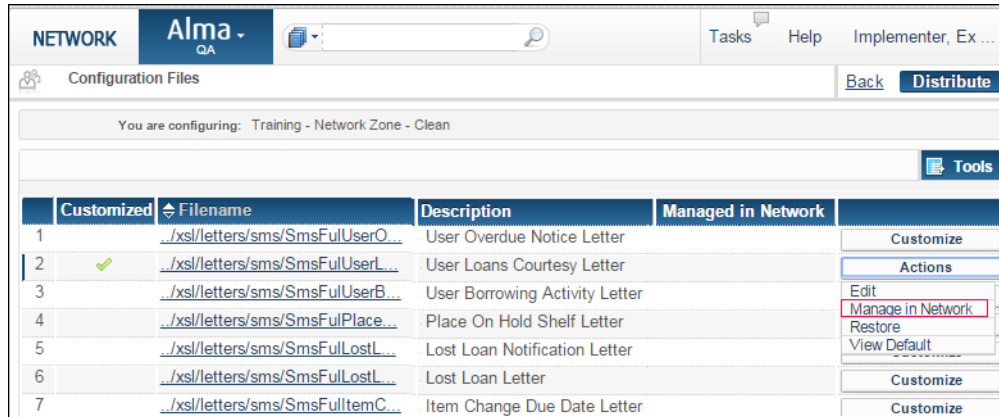


Figure 68: Manage in Network

- 2 Select **Customize > Actions > Manage in Network** for the letter that you want to manage in the Network Zone.

A green check mark appears in the **Managed in Network** column for the letter that indicates that that letter is managed by the Network Zone.

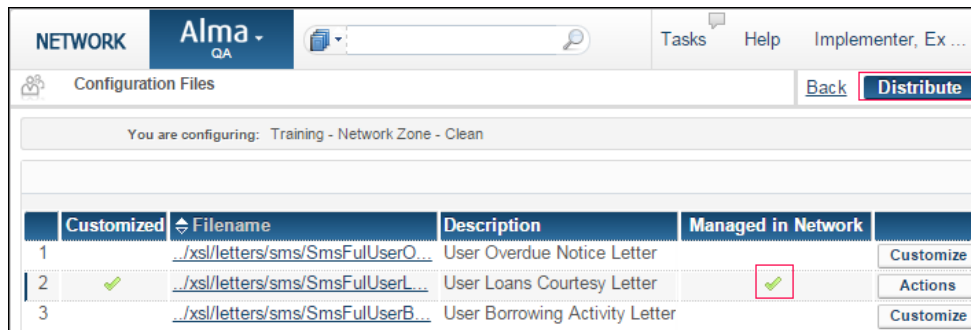


Figure 69: Managed in Network

- 3 Perform any customizations that you want to distribute to member institutions.

- Click **Distribute** to distribute the configuration changes. Click **Confirm** in the confirmation dialog-box to run the job that distributes the changes to member institutions.

The configuration changes are distributed to the member institutions when the job runs. **Network** appears in the **Updated By** column both in the Network Zone and the member institution.

- To stop centralized management of notification letter templates, click **Stop Network Management** for the letter, and then click **Distribute** and **Confirm** in the confirmation dialog-box.

Customized	Filename	Description	Managed in Network	
	./xsl/letters/sms/SmsFulUserO...	Sms Ful User Overdue Notice Letter		Customize
✓	./xsl/letters/sms/SmsFulUserL...	Sms Ful User Loans Courtesy Letter	✓	Actions
	./xsl/letters/sms/SmsFulUserB...	Sms Ful User Borrowing Activity Letter		Edit
	./xsl/letters/sms/SmsFulPlace...	Sms Ful Place On Hold Shelf Letter		Stop Network Management
	./xsl/letters/sms/SmsFulLostL...	Sms Ful Lost Loan Notification Letter		Restore
	./xsl/letters/sms/SmsFulLostL...	Sms Ful Lost Loan Letter		View Default
				Customize

Figure 70: Stop Network Management

Letter customizations changes performed in the Network Zone are no longer distributed to member institutions.

## Relinking a Portfolio to a Different Bibliographic Record in the Network Zone

For information regarding relinking a portfolio to a different bibliographic record in the Network Zone, refer to the procedure **To relink a portfolio to a different bibliographic record**: on page 472 in the *Alma Resource Management Guide*.

## Sharing Import Profile Templates in the Network Zone

### PERMISSIONS:

The following role can work with import profiles:

- Catalog Administrator

With this template capability, you can share vendor-specific import profile definitions in order to simplify the integration with vendors for ongoing workflows such as repository import and embedded order data import.

Collaborative network import profiles managed centrally in the Network Zone can be used as templates that can be copied/customized at the member level.

### To create a Network Zone import profile template:

- 1 Log in to the Network Zone (not member) system.
- 2 Click **Import Profiles** from the **Record Import** section (**Resource Management > Resource Configuration > Configuration Menu**). The Import Profiles page opens.

Notice the following:

- Tabs for **Institution** and **Community**
- **Status** column heading (with **Active**, **Inactive**, or **Template** statuses)

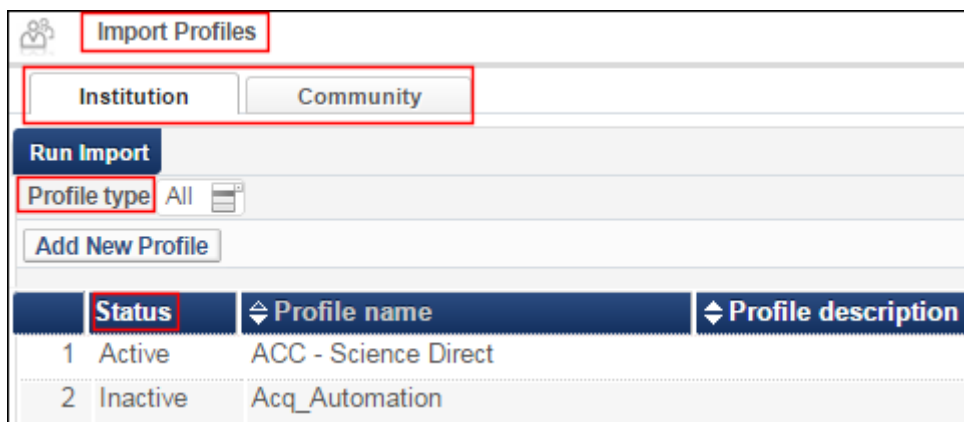


Figure 71: Import Profiles Page

- 3 Click **Add New Profile**.
- 4 Select **Repository** and click **Next**.

- 5 Enter **Profile name**, **Originating system**, and select **Template** for the **Status** parameter.

The screenshot shows a form for configuring an import profile. The 'Profile name' is 'CC Import Profile' and the 'Profile description' is 'CC Import Profile'. The 'Originating system' is 'Alexander Street Press'. The 'Import Protocol' is 'Upload File/s', 'Physical source format' is 'XML', and 'Source format' is 'MARC21 Bibliographic'. The 'Status' dropdown menu is open, showing options: 'Active', 'Inactive', and 'Template'. The 'Template' option is circled in red. Other fields include 'File name patterns', 'Cross walk' (radio buttons for No and Yes), and 'Target format' (MARC21 Bibliographic).

Figure 72: Template Status

- 6 Click **Next** and complete the remainder of the profile as usual.

#### To copy a Network Zone import profile template:

- 1 Log in to a member system.
- 2 Click **Import Profiles** from the **Record Import** section (**Resource Management > Resource Configuration > Configuration Menu**). The Import Profiles page appears.

The screenshot shows the 'Import Profiles' page with the 'Network' tab selected. The page includes a 'Run Import' button, a 'Profile type' dropdown set to 'All', and an 'Add New Profile' button. Below these is a table listing existing profiles.

	Status	Profile name	Profile description
1	Active	New Order	...
2	Active	PromptCat Repository	...
3	Active	Better Bibs	-

Figure 73: Import Profiles Page with Network Tab

- 3 Select the **Network** tab.
- 4 Select **Actions > Copy** in the row of the template with which you want to work. The **Profile Details** tab opens on the Import Profile Details page.
- 5 Edit the import profile details to match your requirements. Refer to the **Creating an Import Profile Part 2: Entering Profile Details** on page 649 section in the *Alma Resource Management Guide* for information regarding the import profile parameters and options.
- 6 When you have completed your import profile changes, click **Save**.
- 7 Select the **Institution** tab to view the profile that you copied. By default, the copied profile has **copied from** information appended to the profile name.

	Status	Profile name	Profile description
1	Active	Adv. Training Gobi New Order	
2	Active	Adv. Training PromptCat Repository	
3	Active	Better Bibs	-
4	Active	Cambridge	-
5	Active	CC Import Profile copied fromNZ)_2015-03...	CC Import Profile
6	Active	Elsevier Ebooks	-

Figure 74: Copied Template

## Monitoring Collaborative Network Jobs Across Institutions

The Network Zone can monitor the jobs run by member institutions of a collaborative network.

### PERMISSIONS:

The following roles have access to the Monitor Jobs page and can monitor the jobs that are relevant to their roles:

- General System Administrator

- Repository Manager
- Catalog Manager
- Catalog Administrator
- Requests Operator
- Purchasing Operator
- Purchasing Manager
- Acquisitions Administrator

### To access this feature:

From the Network Zone, open the Monitoring Jobs page (**Administration > Manage Jobs > Monitor Jobs**). The **Institution Name** filter in the Running and History tabs allows you to filter the results to view jobs run by a member institution, the Network Zone, or all institutions.

The screenshot shows the 'Monitor Jobs' interface with the 'Running' tab selected. The 'Institution Name Filter' dropdown menu is open, showing options: 'All', 'Network Zone', 'Member 1', and 'Member 2'. The table below displays job details for 'Member 2'.

Name	Job ID	Job Category
1 Distribute network Acquisition changes to mem	24743772460001451	Acquisition
2 Distribute network Acquisition changes to members	24743749470001451	Acquisition
3 Distribute network Acquisition changes to members	24743742520001451	Acquisition
4 Distribute network Acquisition changes to members	24743668730001451	Acquisition

Figure 75: Institution Name Filter

### NOTES:

- The Network Zone cannot abort a job run by member institutions.
- For the Network Zone, report and event data is read-only; there are no Actions buttons or links inside the report.

## Switching Between Institutions

Members of a collaborative network can easily switch between member institutions for which they have a user account.

For collaborative networks that use a single sign-on (SSO) authentication mechanism based on the SAML or CAS protocols, member institutions can further switch between member institutions without having to log in separately to each institution.

**To access this feature:**

An **Institutions** link appears at the top of all pages in Alma for the Network Zone and member institutions in a collaborative network.

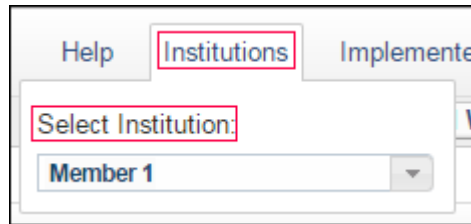


Figure 76: Institutions Link

- 1 Click the **Institutions** link to display a drop-down list of all the institutions in the collaborative network.
- 2 Select the member institution to which you want to log in.

The Alma home page of the member institution you selected opens.

---

**NOTE:**

You must have an account in the member institution to log in to it.

---

Additionally, you can configure a widget for the Alma home page that allows you to switch between member institutions.

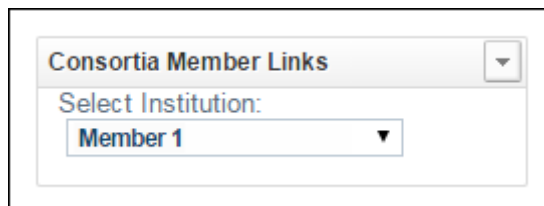


Figure 77: Institutions Link Widget

For more information about configuring widgets, see the **Widgets** section of the *Alma Administration Guide*.



## Centralized Cataloging in the Network Zone

Alma provides additional support for collaborative networks that, as a central cataloging policy, only permit cataloging in the Network Zone, not the Institution Zone. With this new capability, Alma provides a new parameter setting for central record management that locks institutions from creating local Institution Zone records. This locking implementation affects the following areas where local Institution Zone records can be created:

- MD Editor new record creation/copy cataloging (import from an external resource)
- Metadata Import
- Quick Cataloging
- MARC Record Simple View copying

To set the `central_record_management` parameter from the Network Zone:

- 1 In the **General** section of **Resource Management Configuration (Resource Management > Resource Configuration > Configuration Menu)** click **Other Settings** to open the **Mapping Table** page.
- 2 Click **Customize** for the parameter key `central_record_management`.
- 3 Set the parameter value to `true`.

— Mapping Table Rows			
	parameter key	parameter module	parameter value
1	access_right_default_policy	repository	Restrict
2	activation_due	repository	30
3	asrs_socket_timeout	repository	10000
4	call_number_type	repository	0
5	central_record_management	repository	true
6	course_restricted_bib_data_v	repository	false

Figure 78: `central_record_management` Parameter Set to True

The Customize button changes to Actions with the following options:

- Manage in Network
- Restore

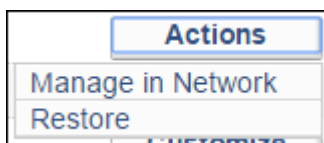


Figure 79: Network Zone Actions Button

- 4 Select **Manage in Network** to identify this setting for distribution to the member institutions.

	parameter key	parameter module	parameter value	free text description	Managed in Network
1	access_right	repository	Restrict		
2	activation_due	repository	30		
3	asrs_socket_t	repository	10000		
4	call_number_t	repository	0		
5	central_record	repository	true		✓
6	course_restric	repository	false		

Figure 80: Network Zone Managed in Network Setting

- 5 Click **Save and Distribute** to have this setting copied to the member institutions (along with all the other settings identified as **Managed in Network**).

To view the MD Editor changes when central\_record\_management is set to true:

- 1 Open the MD Editor (Resource Management > Cataloging > Open Metadata Editor).
- 2 Select File > Options.

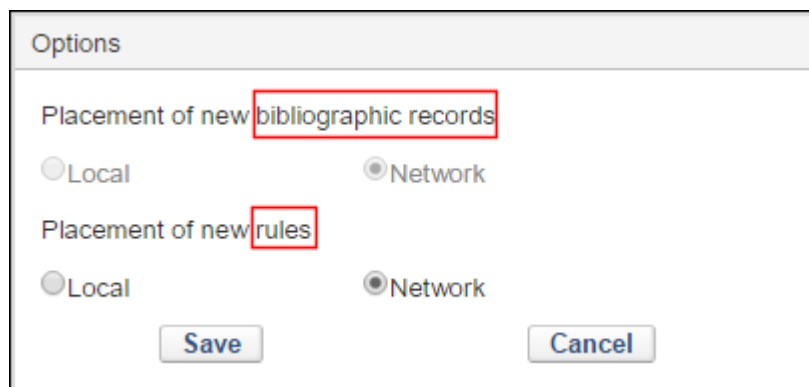


Figure 81: MD Editor File Menu > Options

The placement of bibliographic records and rules can be handled independently. Since `central_record_management` is set to `true`, the placement of bibliographic records defaults to the Network Zone and cannot be changed, while the placement of rules can be done either locally or in the Network Zone.

- 3 View the **File** menu.

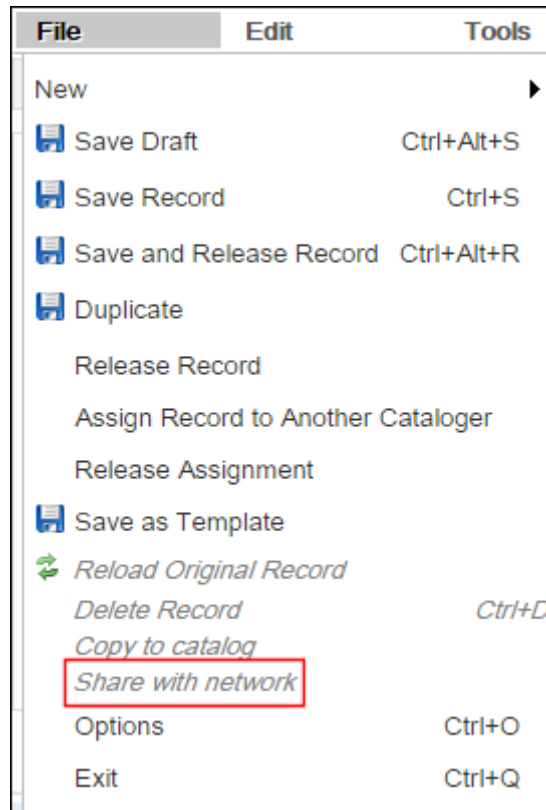


Figure 82: MD Editor File Menu &gt; Share with Network

The Share with Network option remains a part of the menu for times when member institutions may have local (Institution Zone) records that perhaps came across as part of the migration process and those records need to be shared with the Network Zone. This is not an available option for new records, and usually this is an inactive option when `central_record_management` is set to `true`.

**To view the handling of local portfolios and their related bibliographic records when `central_record_management` is set to `true`:**

- 1 Open the **New Portfolio** page (**Resource Management > Create Inventory > Add Local Portfolio**).
- 2 Create a new (local) portfolio and click **Save**. The new (local) portfolio appears in the **Institution** tab on the **Repository Search** page with the local icon.

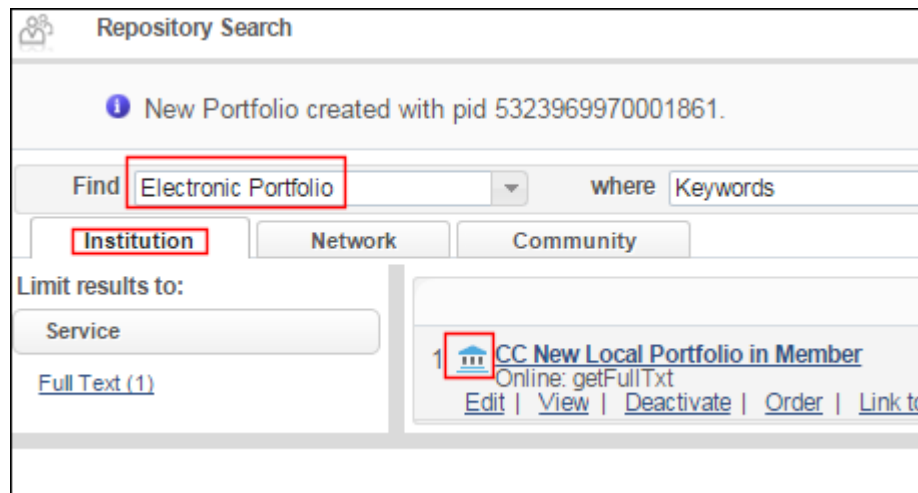


Figure 83: New Local Portfolio in the Member Institution with central\_record\_management Set to True

- 3 Complete an **All titles** search for the new local portfolio in the Institution tab. The bibliographic record appears in the Institution tab on the Repository Search page with the Network icon showing that the bibliographic record for the newly created local portfolio was stored in the Network Zone.

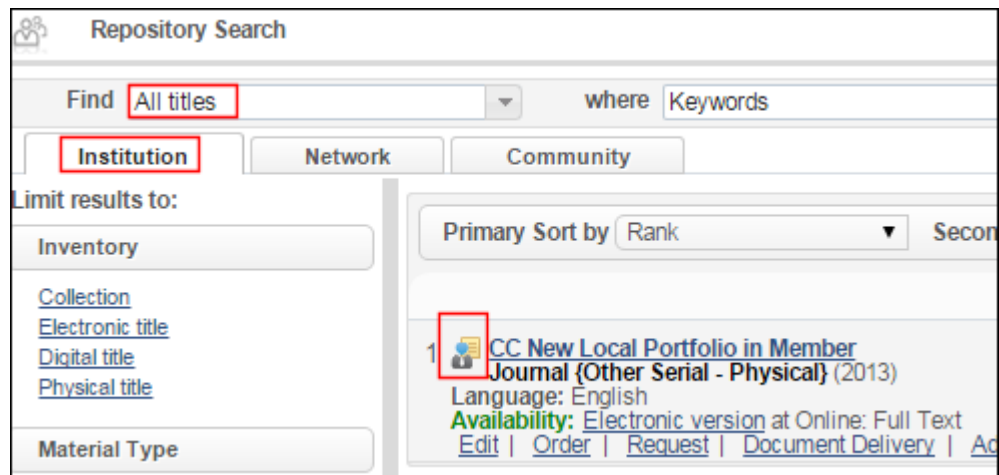


Figure 84: All Titles Search for a New Local Portfolio in the Member Institution with central\_record\_management Set to True

- 4 Complete an **All titles** search for the new local portfolio in the Network tab. The bibliographic record appears in the Network tab on the Repository Search page with the local icon indicating that the institution has inventory associated with the network bibliographic record.

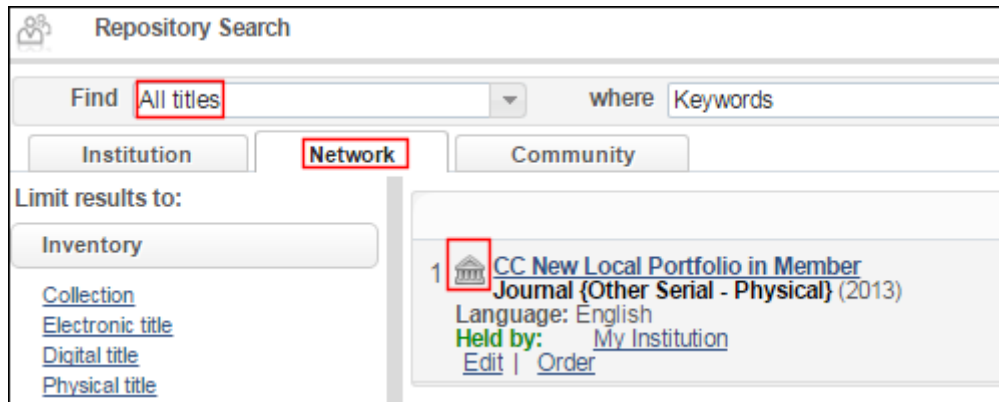


Figure 85: All Titles Search in the Network Tab for a New Local Portfolio in the Member Institution with central\_record\_management Set to True

To view the handling of local portfolios and their related bibliographic records when central\_record\_management is set to false:

- 1 Open the **New Portfolio** page (**Resource Management > Create Inventory > Add Local Portfolio**). The parameter **Placement of new record** enables the user to select either **Network** or **Institution** for the placement of the bibliographic record. Note that another value may appear in place of the label **Network** if the configuration parameter **network\_label** was changed.

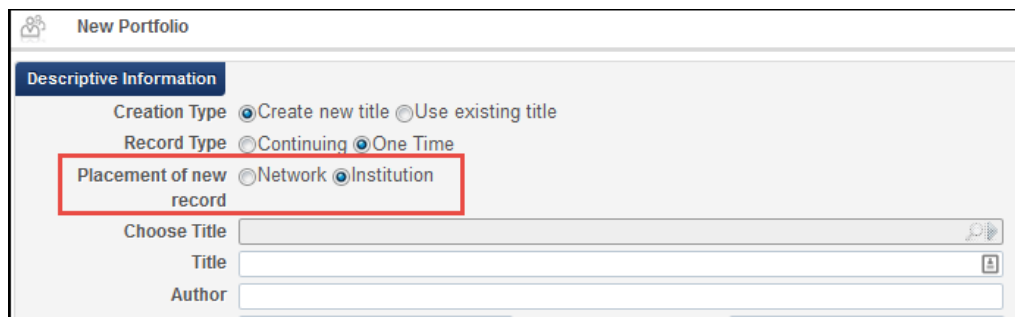


Figure 86: Add New Local Portfolio with central\_record\_management Set to False

- 2 Select **Network** or **Institution** for your new title and complete the remainder of the parameters as you normally would.

To view the quick cataloging (**Add Physical Item**) changes when central\_record\_management is set to true:

- 1 Open the **Quick Cataloging** page (**Resource Management > Create Inventory > Add Physical Item**) by selecting **New** for **Choose Holding Type** and click **Choose**. Or open the **Quick Cataloging** page from patron

fulfillment (**Fulfillment > Checkout/Checkin > Manage Patron Services**, enter the patron's ID, click **Go**, and click **Create Item**).

The screenshot shows a dialog box titled "Choose Holding Type". It contains two radio buttons: "Existing" (unselected) and "New" (selected). Below the radio buttons is a dropdown menu for "Citation Type" with "Book" selected. At the bottom right, there are two buttons: "Cancel" and "Choose". The "Choose" button is highlighted with a red rectangular box.

Figure 87: Add Physical Item in the Member Institution with the central\_record\_management Set to True

- 2 Create a new (local) item and click **Save**.
- 3 Complete a **Physical items** repository search for the new (local) item. It appears in the Institution tab on the Repository Search page.

The screenshot shows the "Repository Search" interface. The search criteria are "Physical items" and "Keywords". The "Institution" tab is selected. The search results show one item: "1 CC New Local Item in Member Book". The "Book" text is highlighted with a red rectangular box. The item details include: "Update Date: 06/13/2015", "Library: CTC Information Commons", "Permanent Location: Permanent Location", "Call Number Type: Library of Congress classification", "Status: Item in place", "Material Type: Book". There are links for "Edit", "Holdings", "Items", "Request", and "Work Order".

Figure 88: New Local Item in the Member Institution with central\_record\_management Set to True

- 4 Complete a **Physical titles** search for the new local item in the Institution tab. The bibliographic record appears in the Institution tab on the Repository Search page with the Network icon showing that the bibliographic record for the newly created local item was stored in the Network Zone.

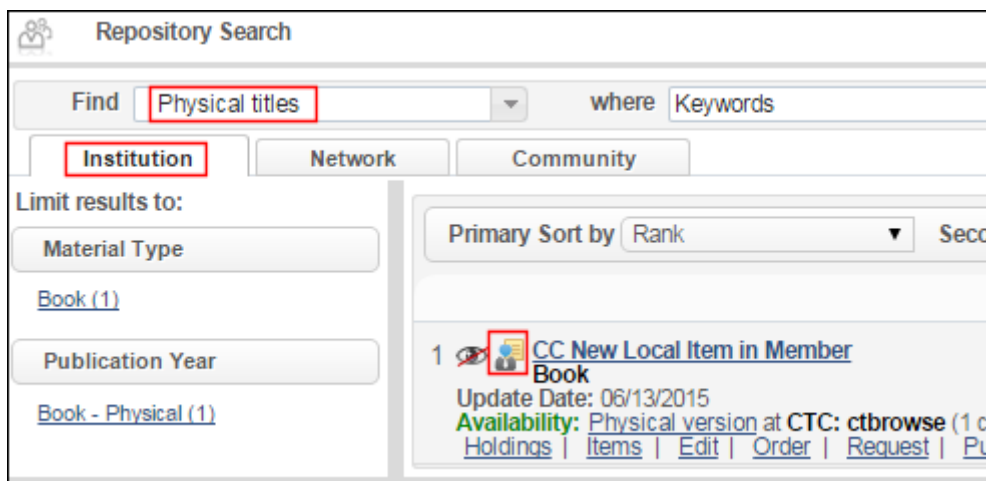


Figure 89: All Titles Search for a New Local Portfolio in the Member Institution with central\_record\_management Set to True

- 5 Complete an **All titles** search for the new local item in the Network tab. The bibliographic record appears in the Network tab on the Repository Search page with the local icon indicating, that the institution has inventory associated with the network bibliographic record.

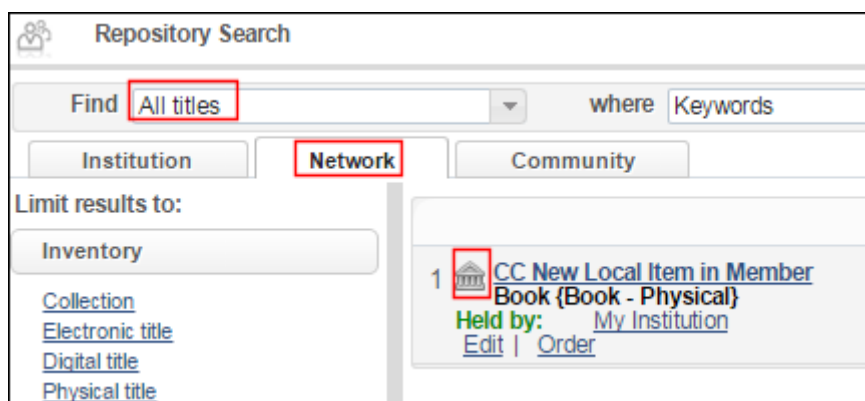


Figure 90: All Titles Search in the Network Tab for a New Local Item in the Member Institution with central\_record\_management Set to True

**To view the MARC Record Simple View copying changes when central\_record\_management is set to true:**

- 1 Complete an **All titles** search from the Community tab in the repository search.
- 2 Click the title link for a record in your search results to open the title in the MARC Record Simple View page. The MARC Record Simple View page



provides only the **Copy to Network** option to enable creating/copying the record in the Network Zone (not the Institution Zone).

Title		Love	
MMS ID	992550000000089390	Originating system	CKB
		Originating system ID	25500000000089390
Suppress from publishing	No	Export to WorldCat	Don't publish
		Brief record	No
LDR 02398nam a22003613u 4500			
001	992550000000089390		
005	20130418052956.0		
006	m d		
007	cr -n-----		
008	130418s2011      s       eng d		
020	__  e 1-283-95721-3		
020	__  e 1-78042-229-6		
020	__  a 1-84484-855-8		
035	__  a (CKB)25500000000089390		

Figure 91: MARC Record Simple View in a Member Institution with central\_record\_management Set to True

To view the import profile changes when central\_record\_management is set to true:

- 1 In the **Record Import** section of **Resource Management Configuration** (**Resource Management > Resource Configuration > Configuration Menu**) click **Import Profiles** to open the Import Profiles page.
- 2 Click **Add New Profile**.
- 3 Select the **Repository** profile type and click **Next**. The Import Profile Details page appears.

The screenshot shows the 'Import Profile Details' form for a 'Repository' profile type. The 'Profile Details' section is active. The 'Use Network Zone' parameter is highlighted with a red box and is set to 'Yes'. Other parameters include: Profile name (required), Profile description, Originating system (required), Import Protocol (Upload File/s), Physical source format (XML), Source format (MARC21 Bibliographic), and Status (Active).

Figure 92: Use Network Zone Parameter Locked with the Yes Setting

The **Use Network Zone** parameter is locked with the **Yes** setting versus the optional check box setting (see below).

The screenshot shows the 'Import Profile Details' form for a 'Repository' profile type. The 'Profile Details' section is active. The 'Use Network Zone' parameter is highlighted with a red box and has an unchecked checkbox. The form includes navigation buttons: 1, 2, 3, Cancel, Save Draft, and Next. Other parameters include: Profile name (required), Profile description, Originating system (required), File name patterns, Import Protocol (Upload File/s), Cross walk (radio buttons for No and Yes), Physical source format (XML), Source format (MARC21 Bibliographic), Target format (MARC21 Bibliographic), and Status (Active).

Figure 93: Use Network Zone Parameter with the Optional Check Box

## Creating Records in the Network Zone with the Portfolio Loader

Central cataloging in collaborative networks has the ability to create and match bibliographic records in the Network Zone with the Alma Portfolio Loader.

When the `central_record_management` parameter is set to `true` and portfolios are imported locally using the Alma Portfolio Loader, the system checks for matching bibliographic records in the Network Zone; and when no bibliographic record match is found in the Network Zone, a new bibliographic record is added to the Network Zone to which the loaded portfolio is linked.

There is a **Bibliographic** section in the **Portfolio Loader** wizard with the **Select catalog** options of **Institution** and **Network**. When the `central_record_management` parameter is set to `true`, the **Select catalog** option is set to **Network** and cannot be changed, thereby ensuring that bibliographic records are stored in the Network Zone (not the Institution Zone).

The screenshot shows the 'Activation Wizard: File Upload' interface. It features several sections:

- Electronic Collection Information:** Includes fields for 'Electronic Collection name' (Highwire Press Free), 'Type' (Selective package), 'Electronic Collection Level URL' (-), and 'Additional descriptive information' (-).
- Bibliographic:** Contains the 'Select catalog' section with two radio buttons: 'Institution' (unselected) and 'Network' (selected). This section is highlighted with a red border.
- Select File:** Includes a 'File \*' input field.
- Select Loading Policy:** Includes the 'Loading Policy Type' section with two radio buttons: 'Complete' (selected) and 'Incremental' (unselected).
- Bottom Section:** Contains three checkboxes: 'Add local portofflios' (unselected), 'Update portfolios' (unselected), and 'Delete portfolios' (unselected).

Figure 94: Activation Wizard: File Upload Page

When the `central_record_management` parameter is set to `false`, the **Select catalog** option can be set to either **Institution** or **Network** providing the option to store bibliographic records in either location.

To view the new capability for the Alma Portfolio Loader (when the `central_record_management` parameter is set to `true`):

- 1 Complete a repository search to locate the electronic collection to which you want to load portfolios.
- 2 From the repository search results, click the **Edit Service** link for the electronic collection to which you want to load portfolios.
- 3 Select the **Portfolios** tab and click **Load Portfolios**. The Activation Wizard: File Upload page appears displaying the **Bibliographic** section that contains the **Select catalog** options of **Institution** and **Network** with **Network** selected as the default and not changeable.

When portfolios are imported locally using the Alma Portfolio Loader (and the `central_record_management` parameter is set to `true`), the system checks for matching bibliographic records in the Network Zone and processes the results in the following manner:

- When no bibliographic record match is found in the Network Zone, a new bibliographic record is added to the Network Zone to which the loaded portfolio is linked.
  - When a single bibliographic record match is found in the Network Zone, a link to that matching bibliographic record is created.
  - When multiple bibliographic matches are found in the Network Zone, nothing is done (manual handling may be required).
- 4 Complete the remainder of the wizard for loading portfolios as you normally would.

## Linking Local Inventory to Bibliographic Records in the Network Zone or the Community Zone

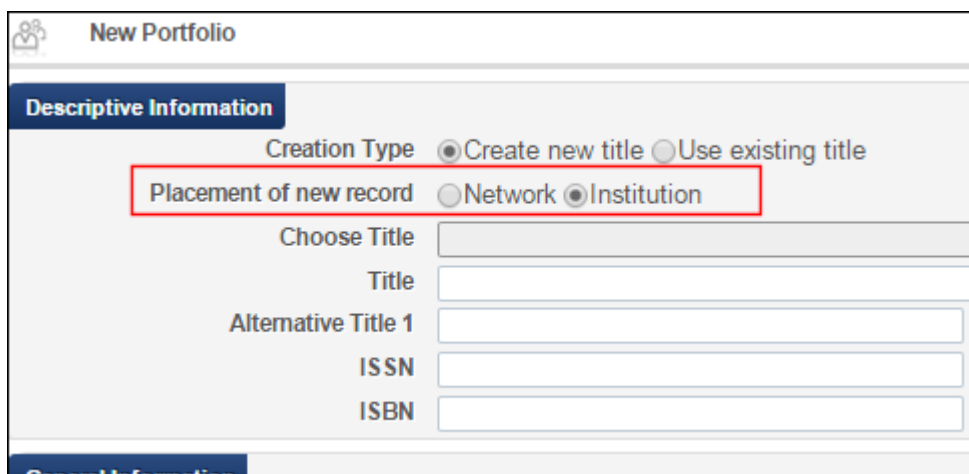
Alma provides options for linking local portfolios and electronic collections to Network Zone or Community Zone bibliographic records.

To link local portfolios to the Network Zone or the Community Zone when creating local portfolios:

- 1 Click **Add Local Portfolio (Resource Management > Create Inventory)**. The New Portfolio page appears.
- 2 Select **Create new title** or **Use existing title** for the **Creation type**.

- When you select **Create new title**, the **Placement of new record** options appear enabling you to select **Network** or **Institution** for the placement/linking of the bibliographic record for your portfolio.

If your institution has configured `central_record_management` to be true (refer to [Centralized Cataloging in the Network Zone](#) on page 73 for more information), the **Placement of new record** options do not appear on the New Portfolio page since choosing `central_record_management` would indicate that you want your bibliographic records managed only in the Network Zone and not the Institution Zone.



The screenshot shows the 'New Portfolio' page with the 'Descriptive Information' tab selected. Under 'Creation Type', the 'Create new title' radio button is selected. Below it, the 'Placement of new record' section has the 'Institution' radio button selected, and this section is highlighted with a red box. The 'Choose Title' section contains input fields for 'Title', 'Alternative Title 1', 'ISSN', and 'ISBN'. The 'General Information' tab is partially visible at the bottom.

Figure 95: New Portfolio Page Create New Title

- When you select **Use existing title** (see below), the **Placement of new record** options dynamically are removed from the page. Instead, when you browse to choose a title (bibliographic record to link to), the search options provide access to the bibliographic records in the Network tab and the Community tab. Previously, the system only provided browsing of the Institution Zone records.

Figure 96: New Portfolio Page Use Existing Title

Figure 97: Browse Network Tab and Community Tab for the Bibliographic Record to Which You Want to Link

**To link electronic collections to the Network Zone or the Community Zone:**

- 1 Complete a search for the electronic collection that you want to link to a Network Zone or Community Zone bibliographic record.
- 2 From the search results, click the **Edit** link for the electronic collection that you want to link to a Network Zone or Community Zone bibliographic record. The Electronic Collection Editor page appears.
- 3 Select the **Additional Information** tab.

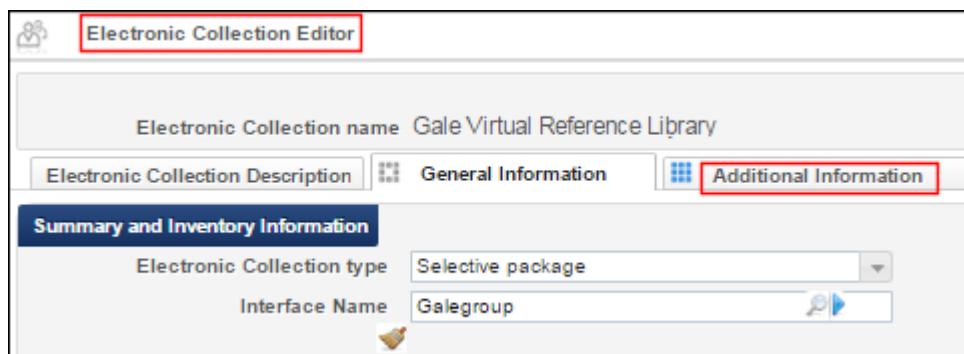


Figure 98: Additional Information Tab

- 4 Browse the **Additional descriptive information** parameter to locate the Network Zone or Community Zone bibliographic record to which you want to link your electronic collection.

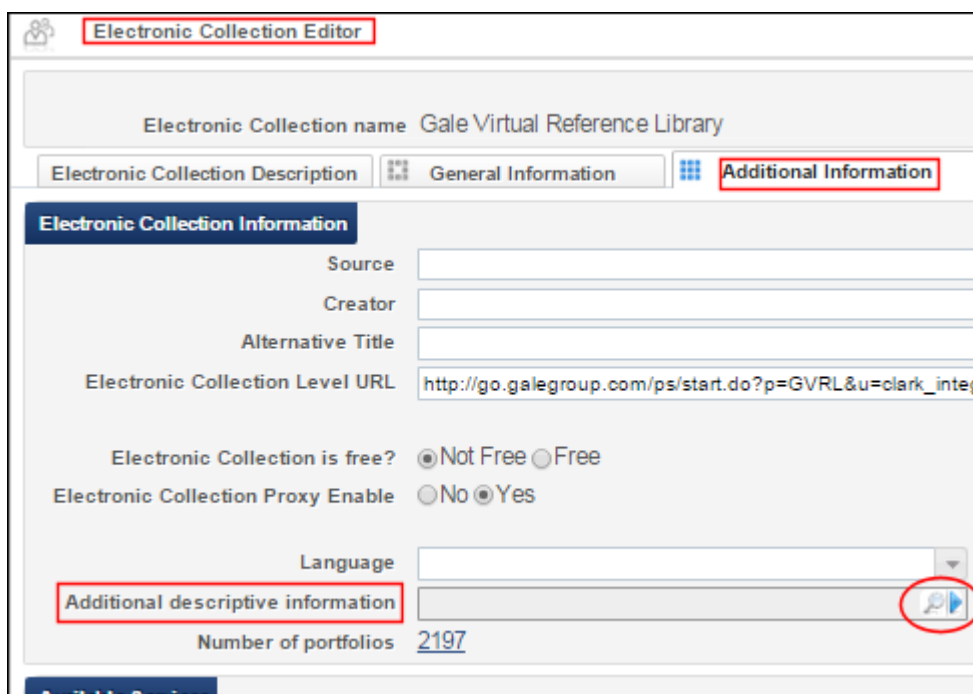
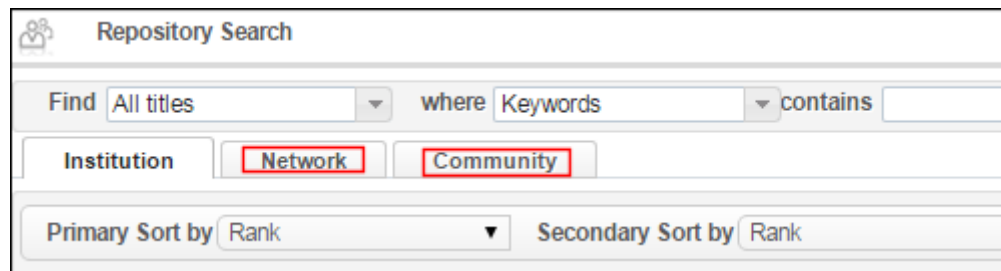


Figure 99: Browse Additional Descriptive Information



The screenshot shows the 'Repository Search' interface. At the top, there is a search bar with a magnifying glass icon and the text 'Repository Search'. Below this, there are two dropdown menus: 'Find' set to 'All titles' and 'where' set to 'Keywords', followed by a 'contains' text input field. Below the search bar, there are three tabs: 'Institution', 'Network', and 'Community'. The 'Network' and 'Community' tabs are highlighted with red boxes. At the bottom, there are two dropdown menus for sorting: 'Primary Sort by' set to 'Rank' and 'Secondary Sort by' set to 'Rank'.

Figure 100: Browse Network Tab or Community Tab

- 5 From the search results, select the bibliographic record to which you want to link and click **Select**.
- 6 Complete the remainder of any changes that you have in the Electronic Collection Editor as you normally would.

**To link electronic collections to the Network Zone or the Community Zone from the Activation Wizard:**

- 1 Click **Manage Electronic Resource Activation (Resource Management > Manage Inventory)** to locate the electronic collection that you want to activate. The Electronic Resource Activation Task List page appears.
- 2 From the task list, select **Actions > Activate** for the electronic collection you want to activate. The Activation Wizard: Electronic Collection and Services Setup page appears.
- 3 Browse the **Additional descriptive information** parameter to locate the Network Zone or Community Zone bibliographic record to which you want to link your electronic collection.




**Activation Wizard: Electronic Collection and Services Setup**

**Electronic Collection Information**

Electronic Collection name GeoScienceWorld  
 Type Selective package  
 Electronic Collection Level URL -  
 Additional descriptive information -

**Local Electronic Collection Information**

Public name   
 Electronic Collection Level URL   
 Additional descriptive information    
 Electronic Collection Proxy Enabled  No  Yes

**Full Text Service**

Figure 101: Browse Additional Descriptive Information in the Activation Wizard

**Repository Search**

Find  where  contains

Institution

Primary Sort by  Secondary Sort by

Figure 102: Browse Network Tab or Community Tab

- 4 From the search results, select the bibliographic record to which you want to link and click **Select**.
- 5 Complete the remainder of the Activation Wizard as you normally would.

## Relinking Holdings to the Network Zone or the Community Zone

The holdings relinking capability provides the capability to relink to bibliographic records in the Network Zone or the Community Zone.

**To relink holdings records to bibliographic records in the Network Zone or the Community Zone:**

- 1 Complete a **Physical titles** search in the Institution tab from the repository search (**Resource Management > Search and Sets > Repository Search**).
- 2 For the title that you want to relink, click the **Holdings** link.

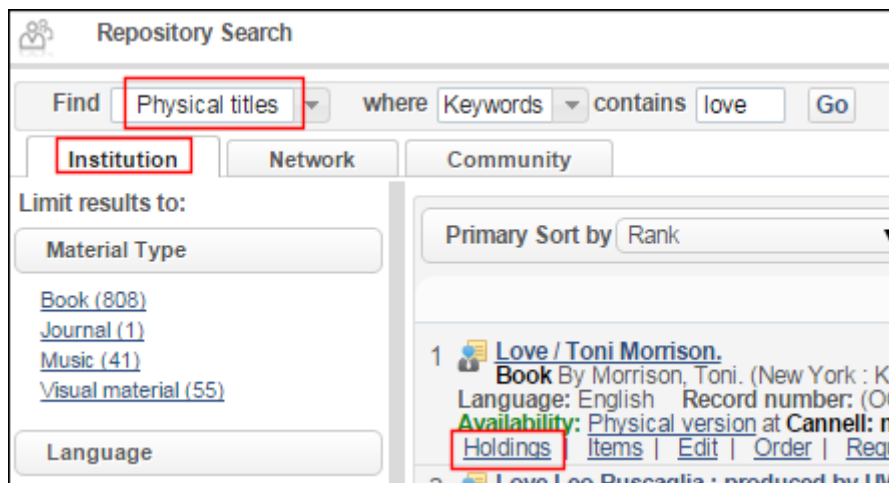


Figure 103: Holdings Link

The MARC Record Simple View page appears.

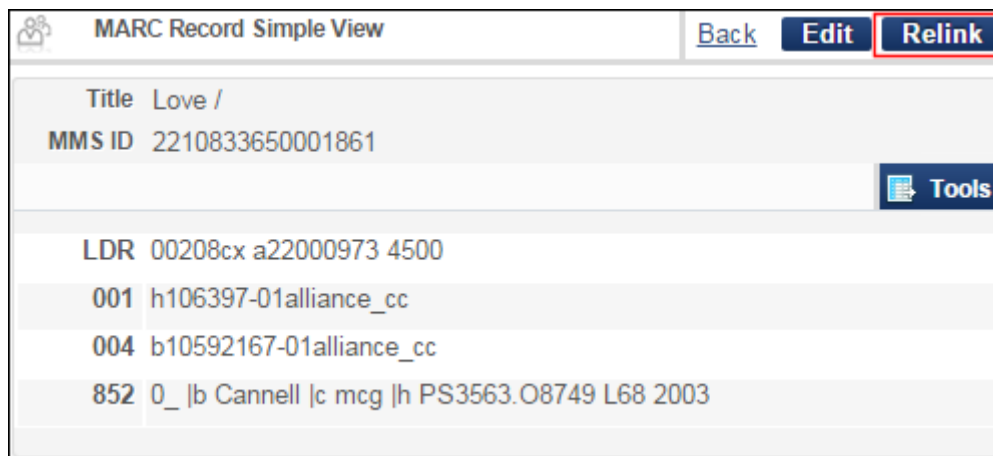
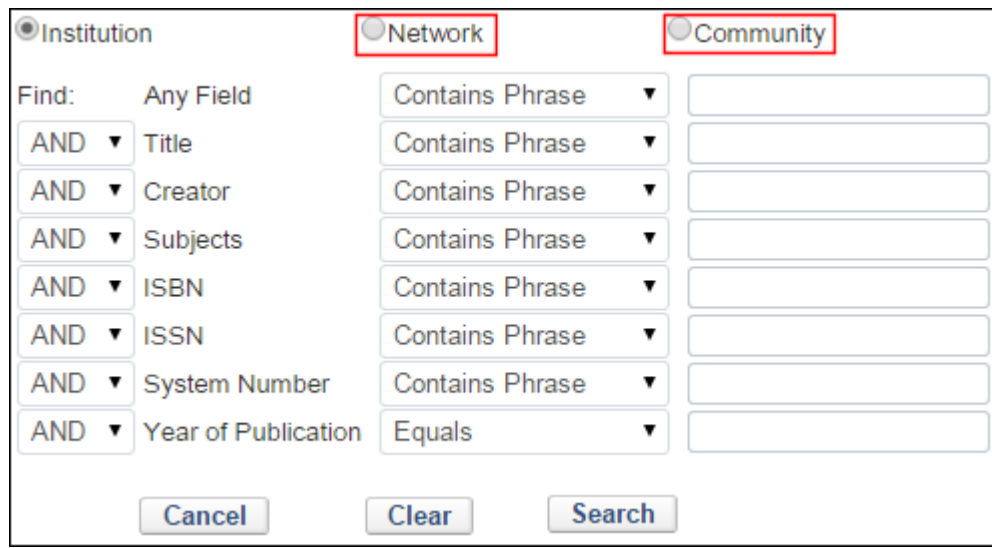


Figure 104: Relink from the MARC Record Simple View

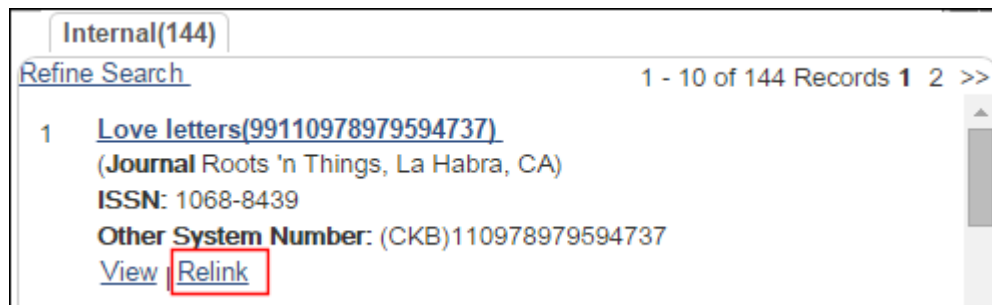
- 3 Click **Relink**. The MD Editor opens with a search panel enabling you to locate a bibliographic record in the Network Zone or Community Zone in addition to the Institution Zone to which you can relink.



The image shows the MD Editor Relink Search Panel. It features three radio buttons at the top: 'Institution' (selected), 'Network', and 'Community'. Below these are search criteria rows. Each row has a dropdown menu for the search type (e.g., 'Contains Phrase', 'Equals') and an input field. The search criteria are: Any Field, Title, Creator, Subjects, ISBN, ISSN, System Number, and Year of Publication. At the bottom are 'Cancel', 'Clear', and 'Search' buttons.

Figure 105: MD Editor Relink Search Panel

- 4 Select Network or Community, enter search criteria for a bibliographic record to which you want to relink, and click Search. The search results appear in the MD Editor from which you can identify the bibliographic record to which you want to relink.



The image shows the Relink Search Results. It displays a search result for 'Love letters(99110978979594737)' from the 'Internal(144)' zone. The record details include '(Journal Roots 'n Things, La Habra, CA)', 'ISSN: 1068-8439', and 'Other System Number: (CKB)110978979594737'. At the bottom, there are 'View' and 'Relink' buttons, with 'Relink' highlighted by a red box.

Figure 106: Relink Search Results

- 5 Click **Relink** for the bibliographic record to which you want to link in the Network Zone or Community Zone (depending on which zone you selected for your search). The record to which you did a **Relink** opens in the MD Editor.

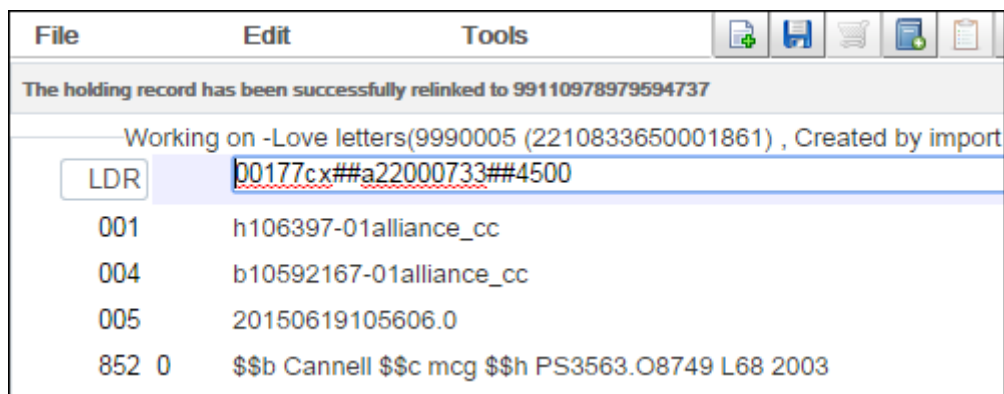


Figure 107: Relinked Record Opens in the MD Editor

- 6 Click **Save**.

## Cataloging Privileges in the Network Zone

Refer to the section **Cataloging Privileges** on page 230 in the *Alma Resource Management Guide* for information describing the implementation of cataloging permission levels and any special considerations for the Network Zone.