

# Maximizing Consortia Potential

Leveraging New Features for  
Adaptability, Efficiency, and Advocacy



# Agenda



## How does our platform support and empower consortia today?

A look at our current approach to consortial collaboration, workflows, and infrastructure



## What have we delivered recently to enhance the consortial experience?

Highlights from the past year: New features, improvements, and real-world impact



## What's on the horizon for consortia in the coming year?

A preview of upcoming developments, strategic goals, and ways we're continuing to evolve for adaptability, efficiency, and advocacy

# How does our platform support and empower consortia today?

A look at our current approach to consortial collaboration, workflows, and infrastructure



# How does our platform support and empower consortia today?

## Types of Collaborative Networks



### Collaboration for Patron Services

- Shared Discovery
- Resource Sharing
- Fulfillment

24 Discovery Networks



### Benefits:

- Efficiencies in operations
- Less duplication of effort/data
- Increased consistency
- Unified user experience



### Collaboration for Technical Services

- Shared Catalog
- Joint Acquisitions
- Analytics
- Administration

50 Consortia with NZ

# What have we delivered recently to enhance the consortial experience?

Highlights from the past year: New features, improvements, and real-world impact



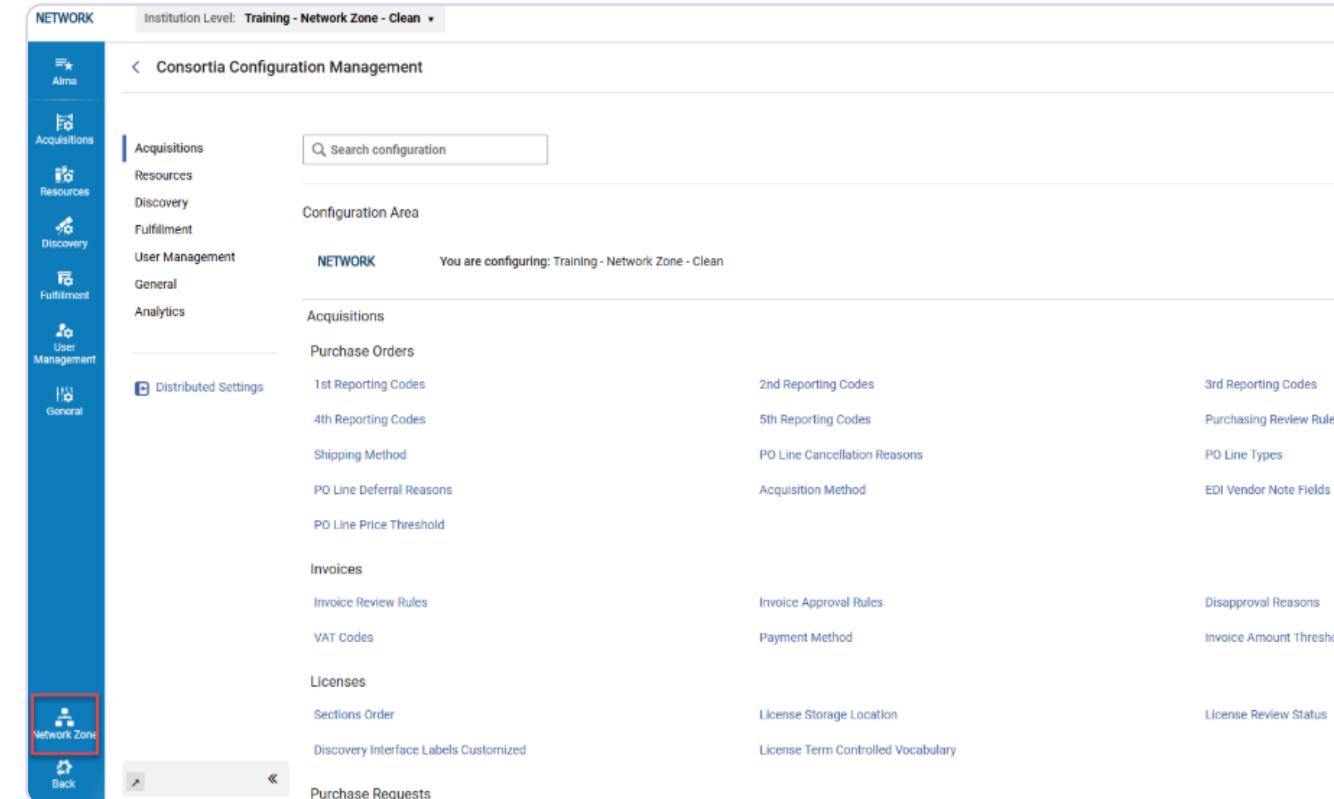
# Central Configuration Dashboard (Release in August 2024)

Code Tables, Mapping Tables and Rules

Easy access to all members configurations

Selective distribution

Distribution mode



The screenshot displays the 'Consortia Configuration Management' interface. The left sidebar is a navigation menu with sections: NETWORK, Alms, Acquisitions, Resources, Discovery, Fulfillment, User Management, General, Analytics, and a 'Distributed Settings' section which is currently selected. The main content area is titled 'Consortia Configuration Management' and shows the configuration for the 'NETWORK' institution level, specifically for 'Training - Network Zone - Clean'. The interface is organized into several columns of configuration items. The first column includes 1st Reporting Codes, 4th Reporting Codes, PO Line Deferral Reasons, PO Line Price Threshold, Invoices, VAT Codes, Licenses, Sections Order, and Discovery Interface Labels Customized. The second column includes 2nd Reporting Codes, 5th Reporting Codes, PO Line Cancellation Reasons, Shipping Method, PO Line Price Threshold, Invoice Review Rules, Payment Method, License Storage Location, and Purchase Requests. The third column includes 3rd Reporting Codes, Purchasing Review Rules, PO Line Types, EDI Vendor Note Fields, Disapproval Reasons, Invoice Amount Threshold, License Review Status, and License Term Controlled Vocabulary. A search bar labeled 'Search configuration' is located at the top of the main content area.

Real time distribution

Row-level vs. Table-level inheritance

Management of configurations on 3 levels

## Benefits for both Central Office and Members

Efficient and Centralized management of configurations across consortia members

# Central Configuration Dashboard - In 2025

## Opening Hours

Management of opening hours at the institution level and/or Library level (when appropriate)

Distribution of Calendar information

## General Electronic Services

Management of General Electronic Services configurations for better cooperation

## Share Online Service Order

Management of Online Services Order configuration for better cooperation

## Hide and Redirect

All Code and Mapping table configurations and rules configurations existing in the Dashboard are removed from the 'old' Alma and Primo VE configuration menus of the Network Zone

A redirection to the Central Configuration Dashboard is offered in the Alma Menu Search box

 Please note that most configurations have been moved to the new dashboard. Click the link below to access it.

## Benefits for both Central Office and Members

Efficient and Centralized management of configurations across consortia members by using the Central configuration Dashboard

# Central Configuration Dashboard - In 2025



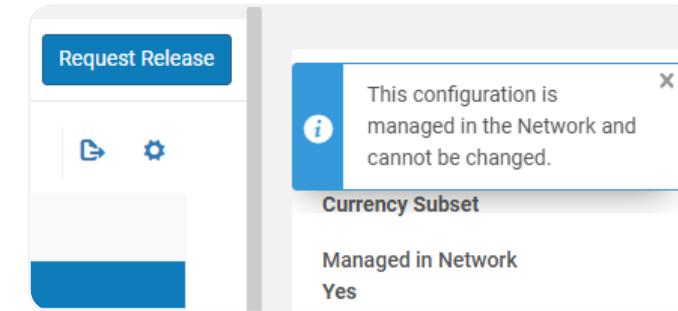
## NZ Distribution notification to IZ administrator

Any update on a Configuration distributed from the Dashboard at the Network level will trigger an email to the relevant administrator at the Member level



## Option for Members to request release of Imposed Mode

Local administrator can request the release of a configuration managed by the Central Office at Member level



### Benefits for Members

Local Administrator will know when and where the Central Office distributes configurations to their local Institution Zone

### Benefits for Members

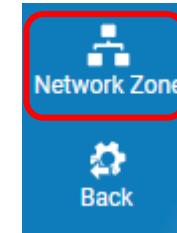
Allows the Institution Zone administrators to get back control on customization of configurations initially managed by the Central Office

# Central Configuration Dashboard - In 2025



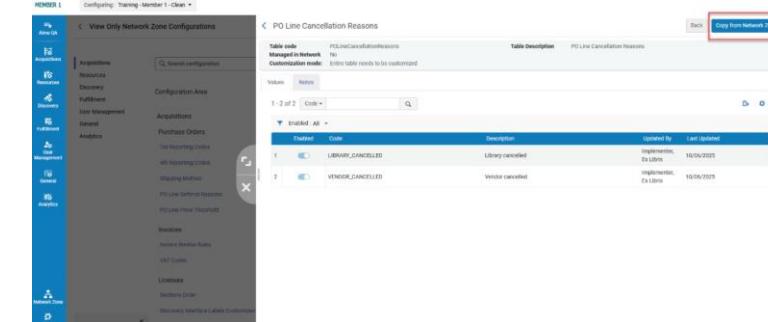
## View in the Network

Option for the Member Administrator to view the network configuration from its member institution.



## Get Value from Network

Option for the Member Administrator to get the network configuration from its member institution.



### Benefits for Members

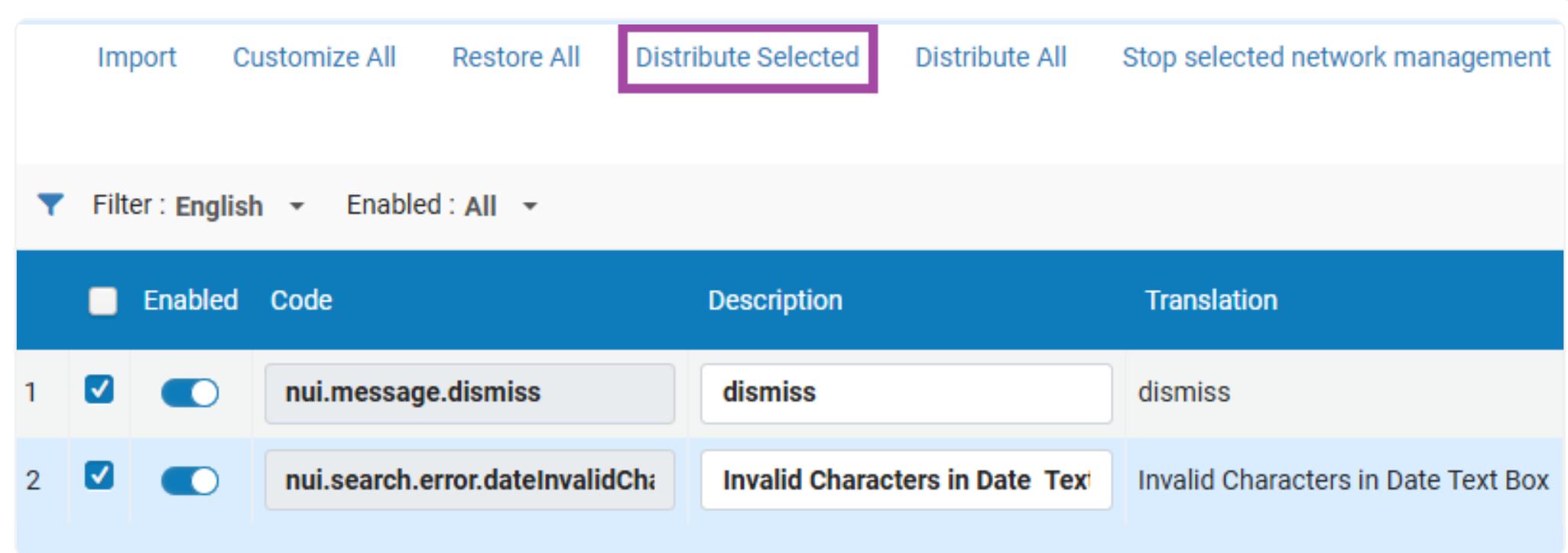
Local Administrator will be able to see the Network Zone configurations from their Institution Zone

### Benefits for Members

Allows the Institution Zone administrators to get from the Network Zone in case the Central Office made a customization they did not receive

# Consortia Dashboard Labels - Row Level Distribution

Management and Row level Distribution of Labels code tables from the Consortia Central Configuration Dashboard



Import    Customize All    Restore All    **Distribute Selected**    Distribute All    Stop selected network management

Filter : English    Enabled : All

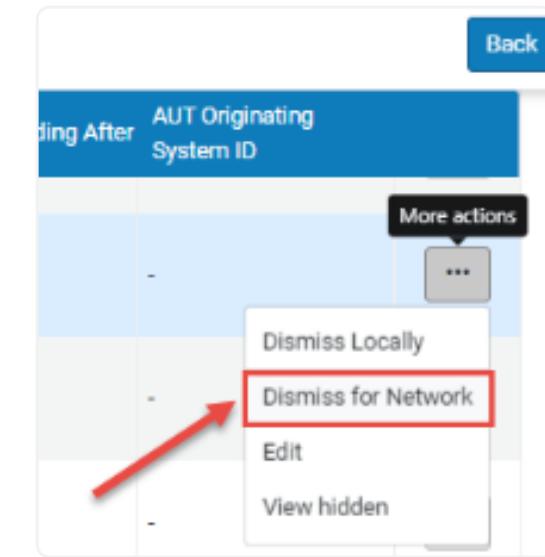
	Enabled	Code	Description	Translation
1	<input checked="" type="checkbox"/>	<input type="checkbox"/>	nui.message.dismiss	dismiss
2	<input checked="" type="checkbox"/>	<input type="checkbox"/>	nui.search.error.dateInvalidChar	Invalid Characters in Date Text Box

## Benefits for both Central Office and Members

Efficient and Centralized management of configurations across consortia members

# Enhanced Authority Control Task List (ACTL) for Consortia

- Reporting of record changes processed in the Network Zone at the Institution Zone level
- Enabling corrections or modifications of such records and pushing them to the entire Consortia members' Authority Control Task List
- Allows members to work together as a group
- NZ-level reporting now reflected on IZ-level ACTL
  - New filter to group by NZ-linked records
  - New indication of each reporting line origin
- Dismissal of NZ-linked records from IZ-level ACTL
  - Dismiss Locally
  - Dismiss for Network



## Benefits for both Central Office and Members catalogers

It improves the experience for Consortia member catalogers working with authorities by reflecting Network Zone linked records reporting in each Institution Zone Authority Control Task List.

# Network Zone Managed Electronic Resources – Library/Campus Level



## Idea Exchange

Central office operators can now allocate electronic resources to specific libraries or campuses within a member Institution Zone.

The screenshot shows a software interface for managing inventory groups. At the top, it displays 'Inventory Management Group Details'. Below this, there are fields for 'Name' (set to 'Music library from Alma university') and 'Group Description' (also set to 'Music library from Alma university'). The main table lists a single member entry:

▲ Member Code	◆ Member Name	◆ Type
1 EXLDEV1_INST : UMUSI	Music Library (Alma University)	LIBRARY

Below the table, there is a section for adding more members with fields for 'Name' and 'Type', and buttons for 'Add Institution', 'Add Consortia Member Campus', and 'Add Consortia Member Library'. The 'Add Institution' and 'Add Consortia Member Campus' buttons are highlighted with a red box.

## Benefits for both Central Office and Members

It improves efficiency by enabling centralized management of electronic resources for individual libraries or campuses within the member Institution Zone, benefiting institutions that require separate management for their libraries or campuses.

# Option to Share Operator Name Across the Fulfillment Network

Institutions in a Fulfillment Network can now opt-in to share the name of their operators who have put items of another institution in transit.

This option is turned off by default.

The operator's name displays in the following locations:



Resource Request  
Monitoring



General tab of the  
Physical Item Editor (right  
hand information pane)



History tab of the  
Physical Item Editor  
(for Item changes and  
Fulfillment activities)



Loan history  
(Loan Audit Trail)

## Benefits for both Central Office and Members

This improves transparency and enables owning institutions more clarity on who at their partner institution is the last person to have handled items they own.

# Add Network Zone Titles to Alma Collections

You can now add titles from the Network Zone to Collections in your Institution Zone.

There are two ways that you can do this:



When adding a title from the Network Zone from the Collection Resource Editor



From the search results list when searching for titles in the Network Zone

## Benefits for Members

Local collection will now include Network Zone titles.

The screenshot shows the Alma Collection Resource Editor interface. The search results list shows two titles: 'A Cultural History of Race in Antiquity' and 'Soldaterne Gynther Hansen'. The 'Add To Collection' option is highlighted in the context menu for the second title. The interface includes facets on the left, a search bar at the top, and a detailed view of the selected title on the right.

# Collection Development - Physical Books Unique Titles Network View

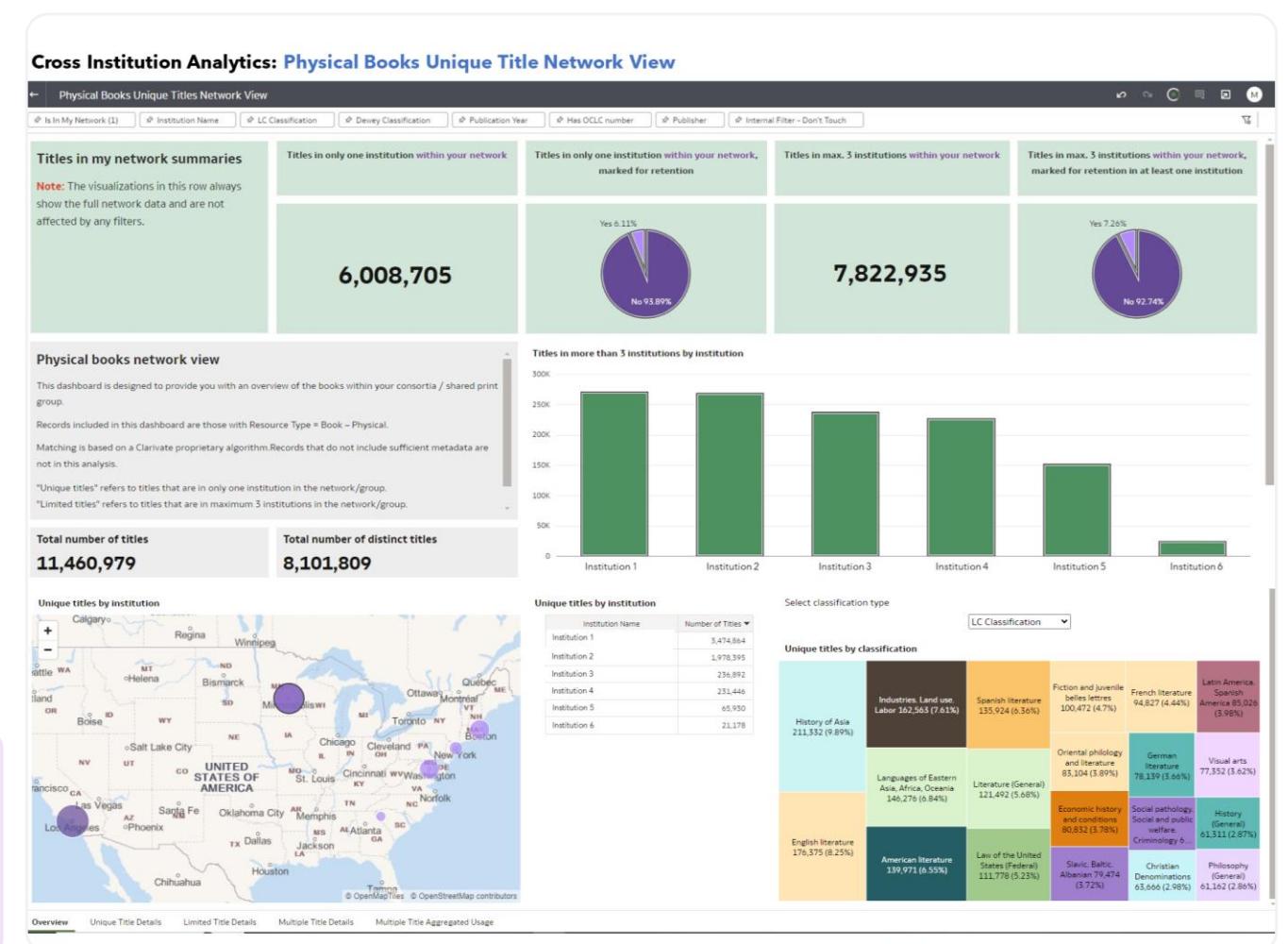


## High Level Consortia View

### Typical questions:

- Which institutions hold the highest number of multiple titles?
- How are certain classifications dispersed across a geographic region?
- Which institution has the largest collection of unique titles per classification?

**Benefits for Central Office**  
Collection development at a glance at NZ level



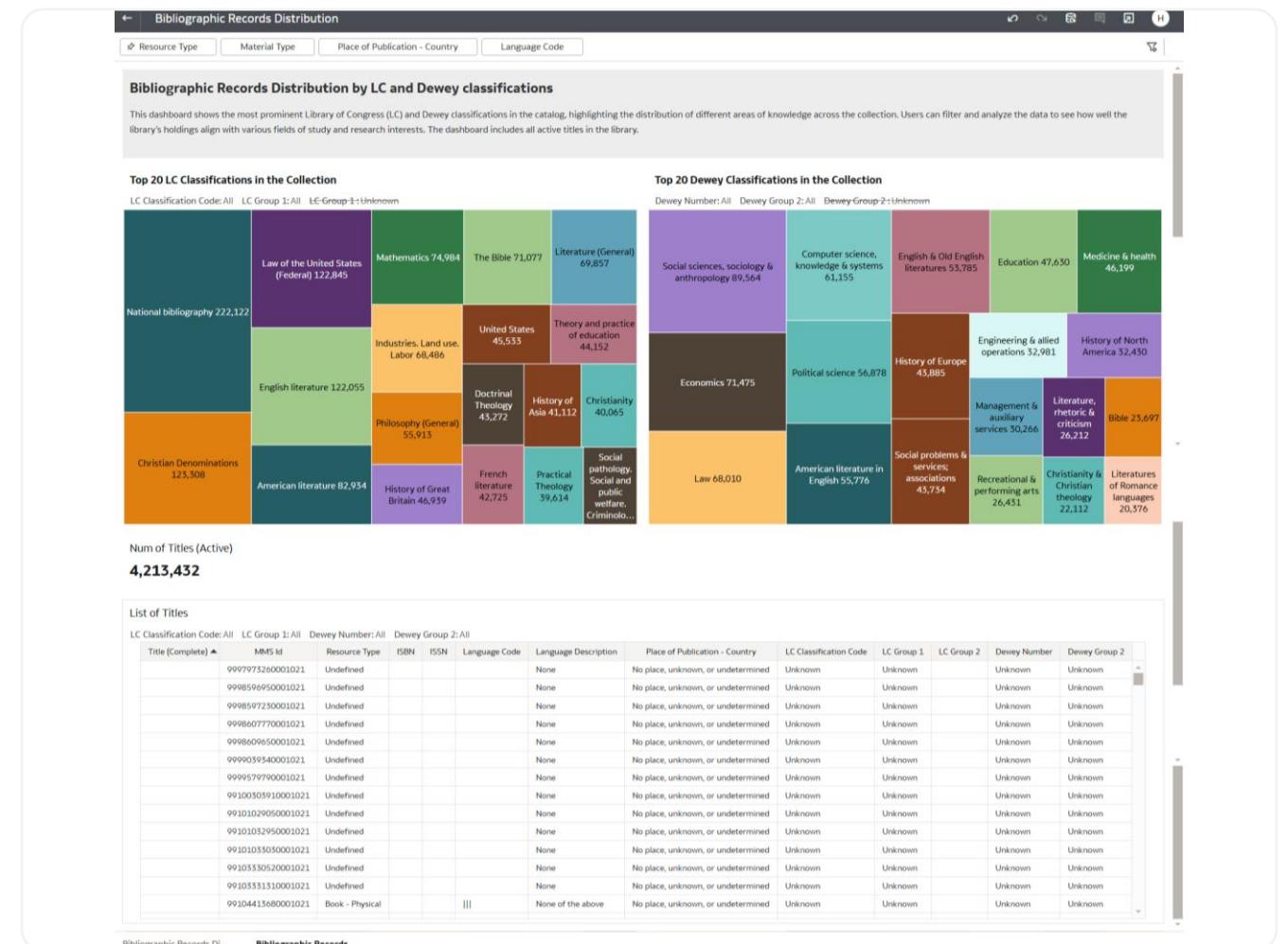
# New LC Subjects Distribution workbook

New Collection Classification Data Visualization dashboard showing the most prominent LC and Dewey classifications in the catalog

Libraries can filter and analyze the data to evaluate how well their holdings support various fields of study

## Benefits for Members

This feature will help institutions better understand their collections, enabling smarter, data-driven decisions.



# Combination of e-Resources Activated at Network Zone and Institution Zone for Display Logic Rules

Using the "Display Logic Rules", Network members will be able to create rules for the Link Resolver electronic services for electronic collections managed in the Network Zone or the institution.



Network Zone operator will be able to manage a member Display Logic Rules configuration and combine e-resources coming from both Network and Institution zones from the Central Configuration Dashboard.



Member administrator will be able to manage Display Logic Rules configuration by combining e-resources coming from both Network and Institution zones.

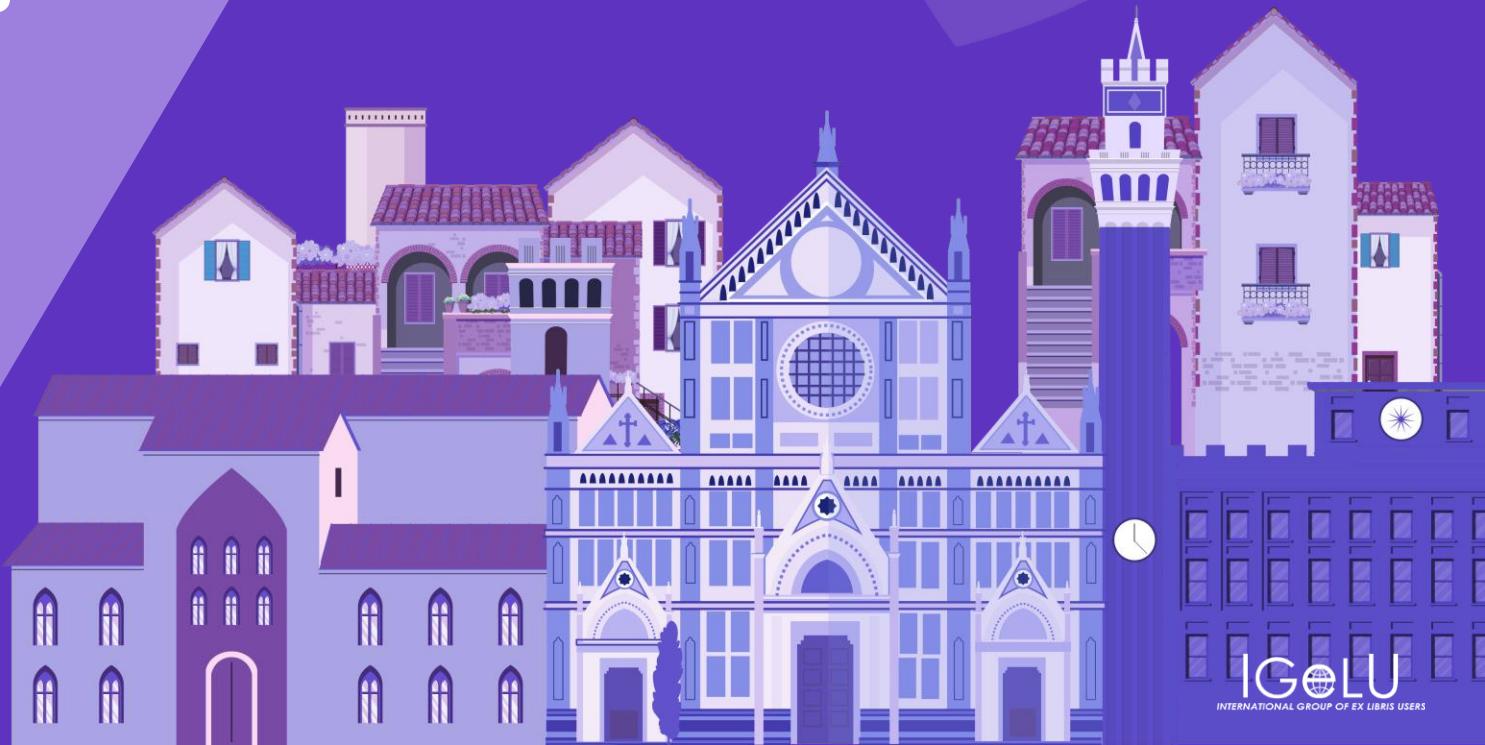
The screenshot shows a 'Add Rule' dialog box. It has several input fields: 'For user from groups' (dropdown), 'hide service \*' (dropdown with 'Full Text' selected), 'with' (dropdown with 'Electronic collection' selected), 'with value \*' (dropdown with 'Select from a list' selected, highlighted with a red box), and 'if service exists' (dropdown). At the bottom are 'Add', 'Cancel', and 'Add and Close' buttons. A tooltip on the right side of the interface states: 'Please Note, The Electronic Collection Pick Up uses a combined search across NZ and IZ records, where applicable.'

## Benefits for Members and Central Office

Display Logic Rules Configuration will now offer a combination of e-resources activated at the Network Zone and Institution Zone.

# What's on the horizon for consortia in the coming year?

A preview of upcoming developments, strategic goals, and ways we're continuing to evolve for adaptability, efficiency, and advocacy



# Working Together



Established consortia  
focus groups



Focus groups provided  
requirement consolidated  
document



Prioritization through  
voting process



Thorough analysis  
conducted by Ex Libris

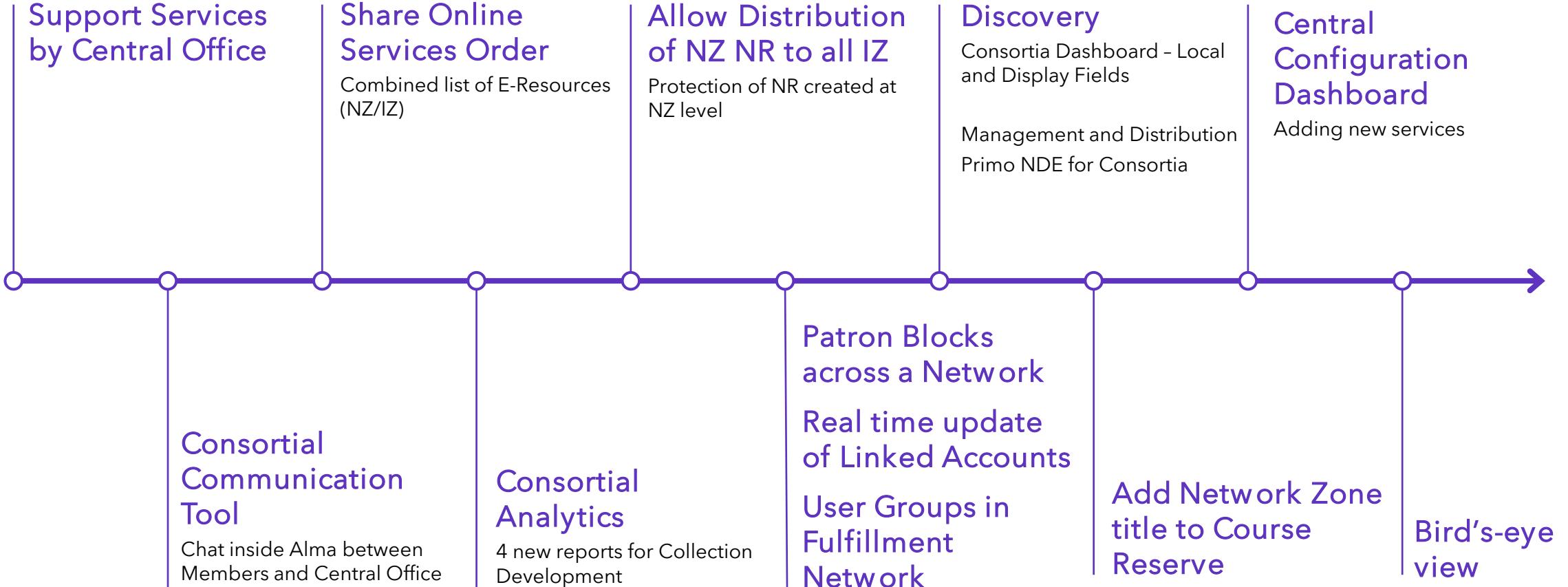


Focus areas were  
identified



Built consortia roadmap  
for 2025/2026

# Collaborative Networks 2025-2026



# What should you take away?



# Key takeaways

## Summary



There are 2 types of collaborative networks:

- For Patron services
- For Technical services



Collaborative network for technical services requires:

- Shared catalog
- Central Office

# Call to Actions



## Participation

Voice your needs in the Community of Practices working group



## Knowledgeable

Stay tuned for new feature announcements in our sneak previews and/or release notes



## Roadmap

Create ideas and vote on existing ideas on the Idea Exchange



## Communication

Always give us feedback



# Thank You

# Your voice matters!

Take our 2-min  
survey now



## Help us innovate

Your feedback drives the next generation of valuable solutions



## See real impact

The improvements you experience today are direct results of feedback from customers like you



## Shape the future

Help us prioritize improvements that will continue to add value to your work