# Alma Workshop Agenda (sample 2-day)

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| **Goals** | * Revise and expand staff understanding of Alma functionality
* Prepare to define and train on local workflows using Alma
* Identify areas for tuning configuration
* Identify areas for more detailed later discussion
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| **Prerequisites** | * Alma initial training completed
* Alma production environment delivered
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| **Format** | * A demonstration-led discussion
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| **Expectations** | * Attendees will be prepared to actively discuss their needs, the work they perform, and their understanding of Alma
* The project manager or designated library project member will record action items for later follow-up
* A room sized for the number of attendees, and including a podium, projector, and internet access for the presenter
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| **Outcomes** | * Revised or expanded understanding of workflows
* List of action items for follow-up after the workshop
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| **Day 1: Technical Services** |
| 8:30 – 9:30 | IntroductionInventory model and searching  |
| 9:30 – 9:50 | Ledgers and fund structuresVendors, accounts, interfaces |
| 9:50 – 10:10 | Break |
| 10:10 – 11:20 | Creating purchase order lines (POLs) * Physical resources
	+ One-time orders
	+ Subscription (Continuous) orders
* Electronic resources
	+ Standalone portfolios
	+ Collections
 |
| 11:20 – 12:00 | Receiving physical items * One-time items
* Subscriptions
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| 12:00 – 1:00 | Lunch |
| 1:00 – 1:45 | Activating electronic resources Standalone portfolios* Collections
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| 1:45 – 2:30 | Creating and approving invoices * Physical resources
	+ One-time orders
	+ Subscription (Continuous) orders
* Electronic resources
	+ Standalone portfolios
	+ Collections
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| 2:30 – 2:45 | Break |
| 2:45 – 3:15 | Overview of the Metadata Editor* Menus
* Tabs
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| 3:15 – 4:00 | Cataloging * Editing Bib records in the repository
* Copy cataloging by importing records from external sources
* Editing or adding Holdings records
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| 4:00 – 4:30 | Working with Item records * Adding Item records
* Editing Item records
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| **Day 2: Fulfillment** |
| 8:30 – 9:30 | IntroductionInventory model and searching  |
| 9:30 – 10:00 | User records |
| 10:00 – 10:15 | Break |
| 10:15 – 11:00 | Fulfillment configuration* Loan limits
* Patron limits
* Block preferences
* Fulfillment Configuration Utility
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| 11:00 – 12:00 | Day-to-day patron services * Retrieving patron records
* Registering new patrons
* Loans
* Renewals
* Returns
 |
| 12:00 – 1:00 | Lunch |
| 1:00 – 1:30 | More on day-to-day patron services * Loans
* Renewals
* Returns
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| 1:30 – 2:15 | Managing requests and holds * Requests for items on loan to others
* Requests for items on the shelf
* Hold shelf maintenance
 |
| 2:15 – 2:30 | Break |
| 2:45 – 4:00 | Course reserves* Infrastructure
* Creating courses
* Adding reading lists
* Scan-in reserve management
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| 4:00 – 4:30 | Workshop wrap-up |