# 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 |
| **Prerequisites** | * Alma initial training completed * Alma production environment delivered |
| **Format** | * A demonstration-led discussion |
| **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 |
| **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 | Introduction  Inventory model and searching |
| 9:30 – 9:50 | Ledgers and fund structures  Vendors, 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 |
| 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 |
| 2:30 – 2:45 | Break |
| 2:45 – 3:15 | Overview of the Metadata Editor   * Menus * Tabs |
| 3:15 – 4:00 | Cataloging   * Editing Bib records in the repository * Copy cataloging by importing records from external sources * Editing or adding Holdings records |
| 4:00 – 4:30 | Working with Item records   * Adding Item records * Editing Item records |
| **Day 2: Fulfillment** | |
| 8:30 – 9:30 | Introduction  Inventory 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 |
| 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 |
| 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 |
| 4:00 – 4:30 | Workshop wrap-up |