

Alma Workshop Agenda

Goals	<ul style="list-style-type: none">• 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	<ul style="list-style-type: none">• Alma initial training completed• Alma production environment delivered
Format	<ul style="list-style-type: none">• A combination of demonstration-led discussion and hands-on activities
Expectations	<ul style="list-style-type: none">• Subject matter experts on the project team will be available for relevant discussions• 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	<ul style="list-style-type: none">• Revised or expanded understanding of workflows• List of action items for follow-up after the workshop

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) <ul style="list-style-type: none">• Physical resources<ul style="list-style-type: none">○ One-time orders○ Subscription (Continuous) orders• Electronic resources<ul style="list-style-type: none">○ Standalone portfolios○ Collections
11:20 – 12:00	Receiving physical items <ul style="list-style-type: none">• One-time items• Subscriptions
12:00 – 1:00	Lunch
1:00 – 1:45	Activating electronic resources Standalone portfolios <ul style="list-style-type: none">• Collections

1:45 – 2:30	<p>Creating and approving invoices</p> <ul style="list-style-type: none"> • Physical resources <ul style="list-style-type: none"> ○ One-time orders ○ Subscription (Continuous) orders • Electronic resources <ul style="list-style-type: none"> ○ Standalone portfolios ○ Collections
2:30 – 2:45	Break
2:45 – 3:15	<p>Overview of the Metadata Editor</p> <ul style="list-style-type: none"> • Menus • Tabs
3:15 – 4:00	<p>Cataloging</p> <ul style="list-style-type: none"> • Editing Bib records in the repository • Copy cataloging by importing records from external sources • Editing or adding Holdings records
4:00 – 4:30	<p>Working with Item records</p> <ul style="list-style-type: none"> • Adding Item records • Editing Item records
Day 2: Fulfillment	
8:30 – 9:30	<p>Introduction</p> <p>Inventory model and searching</p>
9:30 – 10:00	User records
10:00 – 10:15	Break
10:15 – 11:00	Fulfillment configuration

	<ul style="list-style-type: none"> • Loan limits • Patron limits • Block preferences • Fulfillment Configuration Utility
11:00 – 12:00	Day-to-day patron services <ul style="list-style-type: none"> • 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 <ul style="list-style-type: none"> • Loans • Renewals • Returns
1:30 – 2:15	Managing requests and holds <ul style="list-style-type: none"> • 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 <ul style="list-style-type: none"> • Infrastructure • Creating courses • Adding reading lists • Scan-in reserve management
4:00 – 4:30	Workshop wrap-up