

Alma 101

Alma 201

Alma Analytics

Discovery

Post-Implementation
Configurations

Session #1

9:00am – 10:30am

**Optimize and Streamline
Alma Workflows**

Megan Drake

Acquisitions Workflows

Bootcamp (Part 1 of 2)

Jean Cabaup

**Designing and Using
Normalization Rules**

Yoel Kortick

Introduction to Analytics

Connie Braun and

Dominic Doneaux

Resource Types in Primo

Clarice Shin and Jonathan Dror

What's Wrong With This Link?

Vlad Buldyrev and

Jack Boettcher

**Integrating Alma with
Self-Check Out Machines**

Ben Grimshaw

Session #2

11:00am – 12:30pm

**Fulfillment Configuration:
Cause and Effect**

Moshe Shecter

Acquisitions Workflows

Bootcamp (Part 2 of 2)

Jean Cabaup

**Configuring and Using Brief
Record Levels Functionality**

Yoel Kortick

**Advanced Analytics:
Acquisitions**

Connie Braun and

Dominic Doneaux

**Demystifying Analytics for
Discovery in**

Summon and Primo

Christina Braun

**Using Alma Publishing Profiles:
OCLC and Google Scholar**

Ben Grimshaw

Session #3

1:30pm – 3:00pm

**Managing Electronic
Resources: The Basics**

Kevin Lane-Cummings and

Carolyn Sprague

**Working with Sets
and Jobs in Alma**

Callie Mendoza and

Yaala Ariel-Joel

**Advanced Analytics:
Resource Management**

Connie Braun and

Dominic Doneaux

**Primo and Primo VE
New UI Customization**

Jean Cabaup and

Jonathan Dror

**Refining Overdue and Lost
Loan Profiles**

Ben Grimshaw

Session #4

3:30pm – 5:00pm

**Introduction to the New
Ex Libris Developer Network
and Alma APIs**

Yoel Kortick

**Managing Electronic
Resources: Advanced Topics**

Kevin Lane-Cummings and

Carolyn Sprague

**Demystifying Analytics in
Alma**

Matt Warnock

Primo Restful APIs

Jonathan Dror

**Integrating with Bursar
Systems**

Ben Grimshaw

Alma 101

Alma 201

Alma Analytics

Discovery

Summon
360/Intota

Session #1

9:00am – 10:30am

Fundamentals of Resource Sharing
Kevin Lane-Cummings

Designing and Using Normalization Rules
Yoel Kortick

Demystifying Analytics in Alma
Matt Warnock

Primo VE Normalization
Jonathan Dror

Relevance: How Summon Ranks Results on the Page
Brent Cook

Understanding Content Ingestion and the Use of Metadata in the Summon Index
Dominic Doneaux

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Introduction to the New Ex Libris Developer Network and Alma APIs
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Advanced Resource Sharing
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Connie Braun and
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Loading External Data Sources to Primo VE
Clarice Shin and Jonathan Dror

Optimizing Summon, 360/Intota
Christina Braun

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1:30pm – 3:00pm

Letter Configuration and XSL Configuration
Callie Mendoza

Managing Electronic Resources: Advanced Topics
Kevin Lane-Cummings

Advanced Analytics: Resource Management
Connie Braun and
Dominic Doneaux

Primo VE Display Configuration
Clarice Shin and
Vlad Buldyrev

Getting to Know OBI in Summon
Jack Boettcher

Session #4

3:30pm – 5:00pm

Optimize and Streamline Alma Workflows
Megan Drake

Configuring Automation Tasks for Summary Holdings
Callie Mendoza

Advanced Analytics: Fulfillment
Connie Braun and
Dominic Doneaux

Primo and Primo VE Analytics and Dashboards
Jean Cabaup

Creating Your Own OBI Reports for Summon
Jack Boettcher

Monday, April 29

Session Info

9:00am–10:30am

Optimize and Streamline Alma Workflows

Have you been live on Alma for a while? Wondering what you can easily do to optimize your use of Alma? In this session, we will highlight configuration tweaks and Analytics reports across Acquisitions, Cataloging, ERM, and Fulfillment that you can use to begin to streamline your configurations and workflows.

Acquisitions Workflows Bootcamp

(3 hour session)

This session will expose attendees to end-to-end acquisitions workflows and best practices. Topics include: purchasing workflows, receiving print material workflows, and invoicing.

What's Wrong With This Link?

A cross-product look at understanding and troubleshooting common full-text access problems across Alma, Primo, Summon, SFX, and 360 Link.

Designing and Using Normalization Rules

Learn the different options & parameters used in normalization rule syntax, and review actual customer examples to see how they apply to importing into a repository, running jobs, and exporting in a published profile.

Introduction to Analytics

We'll begin the introduction to analytics by running several of the out-of-the-box analyses and editing the requested output to make the results more useful. In addition to reviewing the basic mechanics of editing these reports, we'll build several simple analyses.

Resource Types in Primo

An end-to-end session on how to modify resource types using normalization rules and facet configuration for Local, Multi-Tenant, and Dedicated-Direct Primo customers.

Integrating Alma with Self-Check Out Machines

This session will review the technical requirements and configuration options available for using self-checkout machines with Alma. You'll leave this session with an checklist of how to get started and a template for troubleshooting technical issues.

11:00am–12:30pm

Fulfillment Configuration: Cause and Effect

Understanding the configuration basics of fulfillment is crucial for properly setting up a system that best reflects the library policies and procedures and is best aligned with the patrons' service expectations. In this session, we will uncover the basics of setting up a fulfillment system, focusing on basic physical and electronic fulfillment configurations.

Configuring and Using Brief Record Levels Functionality

Understanding the "brief level rules," and how they can be used for activities like flagging for further enrichment, determining records to be merged/overlaid, creating alerts during POL creation.

Advanced Analytics: Acquisitions

During this advanced analytics topics session, the focus will be on all things Acquisitions. We'll create several analyses:

- A list of new titles received/activated in the past month
- A budget summary
- Cost changes of subscriptions

Demystifying Analytics for Discovery in Summon and Primo

The analytics tools in Summon and Primo can reveal in-depth information about how your discovery tool is being used, what patrons are searching for, and more. In this session we'll review the information available to you to help get a better understanding of user behavior and inform librarians of user actions.

Using Alma Publishing Profiles: OCLC and Google Scholar

Alma has the ability to publish bibliographic and holdings metadata beyond your standard discovery tool. You'll leave this session with an understanding of how Alma publishes metadata to external sources with an emphasis publishing to OCLC and Google Scholar.

EX LIBRIS

Knowledge Days

Monday, April 29

Session Info

1:30pm–3:00pm

Managing Electronic Resources: The Basics

This session will expose attendees to management of electronic resources and best practices in general. Topics covered include:

- Acquiring electronic resources
- Activating electronic collections and portfolios
- Testing and confirming access to e-resources

Advanced Analytics: Resource Management

During this advanced analytics topics session, the focus will be on all things Resource Management. We'll create several analyses:

- Electronic collections content
- Number of Bib records overlaid, merged, created, updated, or deleted by operator
- Identifying Bib records containing multiple ISBNs

Working with Sets and Jobs in Alma

Identifying and grouping sets of records together based on specific criteria is critical for managing your print, electronic, and digital resources. In this interactive session, explore how and when to build logical versus itemized record sets. And, learn how to run and monitor jobs to bulk update the records in your sets.

Primo and Primo VE New UI Customization

Understanding the basics of creating and uploading customization packages to get the most out of the Primo New UI.

Refining Overdue and Lost Loan Profiles

Learn how to more effectively manage lost loan and overdue profiles in Alma so that you can better communicate with your patrons. This session will expand your ability design rules to automate the creation of patron notices, fees and blocks with customized letters.

3:30pm–5:00pm

Introduction to the New Ex Libris

Developer Network and Alma APIs

Learn how to use and navigate the new Ex Libris developer network and get started with Alma APIs, including the APIs and integrations documentation, as well as configuring the API Console, and reviewing some powerful API examples.

Primo Restful APIs

An in-depth review of Primo APIs for all Primo customers.

Integrating with Bursar Systems

This session will review the technical requirements and configuration options available for integrating with Bursar systems with Alma. You'll leave this session with an checklist of how to get started and a template for troubleshooting technical issues.

Managing Electronic Resources: Advanced Topics

If you are experienced in managing e-resources in Alma, and want to learn more ways to leverage Alma's workflows and options, this session is for you. Topics covered include:

- Leveraging Alma's evaluation workflows by managing trials
- Creating electronic inventory by using import profiles
- De-activating and deleting e-resources
- Configuring and maintaining e-resources

Demystifying Analytics for Discovery in Alma

The data available in Alma Analytics can provide key insights into how the library operates. In this session we'll explore some of the ways to utilize that information in the library's decision making and how to take action based on your findings.

EX LIBRIS
Knowledge Days

Tuesday, April 30

Session Info

9:00am–10:30am

Fundamentals of Resource Sharing

Alma's resource sharing options come in many flavors, reflecting the different services libraries suggest to patrons, and the different back-office procedures and systems that are involved in the process. In this session, we will look at the different flavors of resource sharing (broker-based, peer-to-peer, and fulfillment networks), compare and contrast their benefits and workflows, and discuss configuration options.

Designing and Using Normalization Rules

Learn the different options & parameters used in normalization rule syntax, and review actual customer examples to see how they apply to importing into a repository, running jobs, and exporting in a published profile.

Demystifying Analytics for Discovery in Alma

The data available in Alma Analytics can provide key insights into how the library operates. In this session we'll explore some of the ways to utilize that information in the library's decision making and how to take action based on your findings.

Understanding Content Ingestion and the Use of Metadata in the Summon Index

What happens when catalog data is submitted for indexing? Or commercial content? This session will explain both how we process and how we use metadata to ensure your content is discoverable.

Relevance: How Summon Ranks Results on the Page

Many factors play into relevance every time one of your patron does a search. In this session, you'll learn about what we use for ranking both during the index process and at the time of search. We'll help you understand the role metadata plays and what other factors are considered in determining relevance.

Primo VE Normalization

The session will review two types of Primo VE normalization rules. First, we will discuss the ways of modifying the display fields of your records in Primo VE to change how they are displayed in your discovery layer. Second, we will show how to write normalization rules for external data profiles that are stored in Dublin Core or XML formats. Examples and best practices will be presented for both normalization types.

11:00am–12:30pm

Introduction to the New Ex Libris Developer Network and Alma APIs

Learn how to use and navigate the new Ex Libris developer network and get started with Alma APIs, including the APIs and integrations documentation, as well as configuring the API Console, and reviewing some powerful API examples.

Advanced Resource Sharing

A resource sharing process may come in different modes and reflect a variety of different patron expectations and library policies. In this session, we will take a look at some of options that are under the hood, and what they allow you to implement.

Advanced Analytics: Acquisitions

During this advanced analytics topics session, the focus will be on all things Acquisitions. We'll create several analyses:

- A list of new titles received/activated in the past month
- A budget summary
- Cost changes of subscriptions

Loading External Data Sources to Primo VE

An introduction to external data sources, including configuring import profiles and normalization processes for Primo VE customers.

Optimizing Summon, 360/Intota

Are you getting the most out of your instances of Summon and 360/Intota? We'll use this session to review the best practices for configuring Summon and 360/Intota and provide suggestions to ensure a smooth workflow and that you are using these products to their full potential.

EX LIBRIS
Knowledge Days

Tuesday, April 30

Session Info

1:30pm–3:00pm

Letter Configuration and XSL Customization

Letters sent via Alma may be configured in multiple ways. In this session we will show how to add fields to the letters which are not in the default versions. We will also use advanced XSL features to add fields on condition, change the formatting of the text, concatenate fields, and add conditions in the XSL whether or not to print the letter. All examples will be done live and we will see the configuration and results together. While making these changes we will see how to preview configuration changes to the XSL before actually sending the letter.

Managing Electronic Resources: Advanced Topics

If you are experienced in managing e-resources in Alma, and want to learn more ways to leverage Alma's workflows and options, this session is for you. Topics covered include:

- Leveraging Alma's evaluation workflows by managing trials
- Creating electronic inventory by using import profiles
- De-activating and deleting e-resources
- Configuring and maintaining e-resources

Advanced Analytics: Resource Management

During this advanced analytics topics session, the focus will be on all things Resource Management. We'll create several analyses:

- Electronic collections content
- Number of Bib records overlaid, merged, created, updated, or deleted by operator
- Identifying Bib records containing multiple ISBNs

Getting to Know OBI in Summon

Learn the fundamentals of OBI and explore the existing reports and dashboards for your institution. This session will help you understand the OBI interface and tools as well as the reports and the data behind those reports.

Primo VE Display Configuration

An introduction to using Primo VE display configuration, including Views, advanced search, brief and full display and other display options.

3:30pm–5:00pm

Optimize and Streamline Alma Workflows

Have you been live on Alma for a while? Wondering what you can easily do to optimize your use of Alma? In this session, we will highlight configuration tweaks and Analytics reports across Acquisitions, Cataloging, ERM, and Fulfillment that you can use to begin to streamline your configurations and workflows.

Configuring Automation Tasks for Summary Holdings

Configuring and using Automation Tasks to update summary holdings to maximize the benefit to the end user in discovery.

Advanced Analytics: Fulfillment

During this advanced analytics topics session, the focus will be on all things Fulfillment. We'll create several analyses:

- Items on loan to users
- Number of loans over time by classification code/range
- Fines/fee aging report

Primo and Primo VE Analytics and Dashboards

Learn how to use Primo Analytics to analyze patron usage and run reports on Primo activities. See how this new feature can provide information on how to improve discovery and delivery in Primo.

Creating Your Own OBI Reports for Summon

Would you like to create custom reports using the data in OBI? This course will provide the knowledge and tools you need to create custom reports, from understanding what data is available for reporting and how to generate a report.

EX LIBRIS

Knowledge Days