

Ex Libris KNOWLEDGE DAYS



Not sure where to start? We've divided the sessions into helpful tracks for you.

You can stick with one track, or mix and match.

Here's the intent of each track, but be sure to read the session descriptions to make sure it's a good fit for your needs:

Alma 101

Sessions perfect for newer users of Alma who have got the basics down and are looking to expand their knowledge.

Alma 201

More advanced sessions for users who can skip the intro and get into the details.

Alma Analytics

Everything you need to know about Analytics. Join the intro session if you are new to analytics, otherwise you can dive into the specific sessions. Check out day two for more advanced topics.

Discovery

Learn more about our discovery platforms and resource sharing tools and how to get the most out of them.

Consortia

These sessions target the needs of Alma users who are part of a consortium.

Post-Implementation Configuration

Instructional sessions for customers who are ready to start integrating Alma with external systems.

Alma Administration Bootcamp

A two-day intensive covering the content in the Alma Administration Certification training series.

Monday, May 4

Session Info

Alma Admin Bootcamp

This two-day bootcamp will set you up for success with the Alma Administration Certification test. Get live training covering the content of the Alma Administration series from Implementation Consultant Sharai Perkes.

Note, if you select this option you must attend both days of the bootcamp and will not be able to attend any other sessions at Knowledge Days. This two-day intensive is intended for new Alma users who need to complete the Alma Administration Certification. The test will *not* be administered live, you will still need to complete the exam independently online. This bootcamp will help prepare you for the test.

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.

Configuring Automation Tasks for Summary Holdings

Learn how to configure Automation Tasks to update summary holdings and improve how they are displayed to the end user. This session will also provide an introduction to using prediction patterns for easier print serial management.

Alma Analytics for Beginners

New to Analytics? Just getting started? Become more familiar with Analytics by learning about the infrastructure, 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. This session is also beneficial for Leganto users who are starting to report on usage.

Primo VE Display Configuration

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

11:00am–12:30pm

Designing and Using Normalization Rules

Normalization rules can be used to edit bibliographic records automatically at various stages, including when importing, exporting, saving in the metadata editor, and on existing record already in the database.

During this session we will look at the rule syntax, record elements and various conditions. Actual institution use cases will be investigated and the normalization rules will be run on records as they move through various stages of Alma.

Opportunities in Analytics

In this session, we'll examine opportunities to use new options now available in Analytics. Join us to extend your knowledge of what's available. Learn about updates to Counter 5 as well as Electronic Inventory usage and cost per use along with other changes.

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

CDI Hands-On

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.

Key Considerations and Decisions Before Consortia Implementation

Are you a member of a consortium who is planning to migrate to Alma soon? In this session, we will share details of the migration process and talk about what you can be doing now within your consortium and institution to ensure a smooth transition into your project.

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Monday, May 4

Session Info

1:30pm–3:00pm

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.

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

Introduction to Alma Network Zone Topology

Are you a member of a consortium who is planning to migrate to Alma soon? The Network Zone introduces unique variables into the topology of Alma. In this session, we will discuss the Network Zone in the context of the greater Alma topology.

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. This will allow you to change the way records are displayed in the discovery layer without harming the bibliographic records stored in Alma. In addition, we will show how to write normalization rules for external data profiles that are stored in Dublin Core or XML formats. Examples of both normalization types will be presented, showing best practices of the syntax usage.

Investigate Alma Analytics for Acquisitions

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

- A budget summary
- Cost changes of subscriptions

3:30pm–5:00pm

APIs and Integrations for the Non-Technical

Do you find yourself shying away from talk of APIs or integrations in Alma, for lack of technical expertise? Do you ever wonder if you can really set up that integration without a dedicated IT staff person? In this session, we'll discuss the basics of how APIs work and show you a few integrations that you can set up with minimal technical knowledge.

Fundamentals of Sets & Jobs in Alma

In this session we will provide a comprehensive look at creating and managing sets in Alma as well as exploring various set based jobs and processes.

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.

Explore Alma Analytics for Fulfillment

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

- Users by region of the world
- Overdues aging report

Primo VE UI Customization

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

E-Resource Management and Workflows in the Network Zone

Are you a member of a consortium with a Network Zone? Wondering how to handle the electronic resources that you purchase together as a consortium? In this session, we will examine the different models of e-resource management in a Network Zone environment. The workflows will include steps done in the Network Zone as well as those completed by the individual institutions.

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Tuesday, May 5

Session Info

9:00am–10:30am

Automating Workflows

Do you ever think that there must be a way for Alma to do more tasks “automagically”, or that there are workflows you can simplify? In this session we’ll discuss how you can do more with less overhead and show you areas where your library can automate more tasks in Alma.

Alma & ProQuest Book Integrations

This session will share the many integration opportunities customers have to simplify and enhance their workflows for managing ProQuest Books. The session will cover:

- Configuring automatic electronic holdings uploads using the Ebook Central Integration Profile
- Setup of Alma workflows for integration with the OASIS platform, including loading bib records and Purchase Order Lines via Real Time Ordering (RTO)
- Patron Driven Acquisitions through Integration Profiles

Live Q&A Session with Yoel Kortick

Do you have a specific report you are trying to make? Perhaps a filter which you are not sure how to create? How about a prompt that you just can't get exactly as desired? Something else? Join us for this live Q & A session where your questions on any topic relating to Alma Analytics can be heard and responded to live. Preference will be given to those questions sent in advance. Submit your questions to yoel.kortick@exlibrisgroup.com.

Introduction to Primo Analytics

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.

Reveal Alma Analytics for Resource Management

During this advanced session, the focus will be on all things Resource Management. We’ll create several analyses such as:

- Electronic collections content
- Identifying Bib records by OCLC number as part of update or change process

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.

11:00am–12:30pm

Letter Configuration & 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.

How to Use Acquisitions When You Don't Have Time for Acquisitions

Learn how Acquisitions workflows can reduce the amount of time you spend on resource management and provide details on how your budget is spent and materials are utilized by your users.

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.

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

Overlap Analysis & Deselection Tools

More and more institutions are looking for extra space in their libraries for additional activities. Alma Analytics can help you with weeding. Learn how to run reports the find titles that are available in both physical and electronic formats, and how to see which physical items have multiple copies with low or no loan history.

Advanced Discovery and Delivery of Your Digital Files

This session will describe the many delivery options and advanced features related to viewing your digital files, including:

- The new Alma viewer – aligned UX and metadata with Primo; Full customization via Primo Studio; embedded view in Primo; full-text display;
- Full-text generation in Alma and indexing in Primo
- IIIF viewers

Effective Usage of Primo Analytics Reports and Dashboards

Looking for more information about how to use reports in Primo Analytics? During this session we will review several topics and display tricks in building effective reports, including:

- Common Primo Analytics procedures
- Creating, scheduling, and displaying reports and dashboards
- Subject areas and action types included in Analytics for reporting
- How to configure graphs and tables, and concatenate fields for displaying reports
- How to use prompts and filters to enhance reports
- How to use regular expressions and perform mathematical operations on data within reports

Tuesday, May 5

Session Info

1:30pm–3:00pm

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.

Configuration & Cleanup

Do you get feeling that there might be settings that are a little off in Alma? Are you looking for areas of your Alma that could stand for some cleanup? In this session we'll show you tools for evaluating your Alma configurations, and talk about resources that are available to help you find areas that can be cleaned up.

RapidILL

This session will provide details on workflows, settings and tools to enhance and streamline your RapidILL borrowing and lending activities to provide better service to you users.

Forecasts, Trends, and Geographic Maps with Alma and Primo Analytics Data Visualization

Among the visualizations and features in the Data Visualization (DV) are opportunities to analyze the data in new ways, bringing evidence based decision making to a whole new level. During this session we will look at some of these options including forecasts, trends and geographic maps.

Effective Usage of Primo Analytics Reports and Dashboards

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3:30pm–5:00pm

Course Reserves Management in Alma & Leganto

This cross-product session covers best practices for Course Reserves management in both Alma and Leganto

Configuring and Using Brief Record Levels Functionality

Learn how to configure Automation Tasks to update summary holdings and improve how they are displayed to the end user. This session will also provide an introduction to using prediction patterns for easier print serial management.

Using an Excel file as an External Data Source for Alma Analytics via Data Visualization

A feature long-requested by the Alma community is the ability to compare external data loaded via an Excel file with data in Alma Analytics. During this session we will import an Excel file and then analyze it alone in Alma analytics, and then compare it with data already in Alma analytics.

Loading External Data Sources to Primo VE

An introduction to external data sources, including configuring import profiles and normalization processes for Primo VE 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 a checklist of how to get started and a template for troubleshooting technical issues.

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Alma 101	Alma 201	Alma Analytics	Discovery	Consortia
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Session #1	9:00am – 10:30am
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Optimize and Streamline Alma Workflows Megan Drake	Configuring Automation Tasks for Summary Holdings Callie Mendoza	Alma Analytics for Beginners Connie Braun and Dominic Doneaux	Primo VE Display Configuration Clarice Shin	
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Session #2	11:00am – 12:30pm
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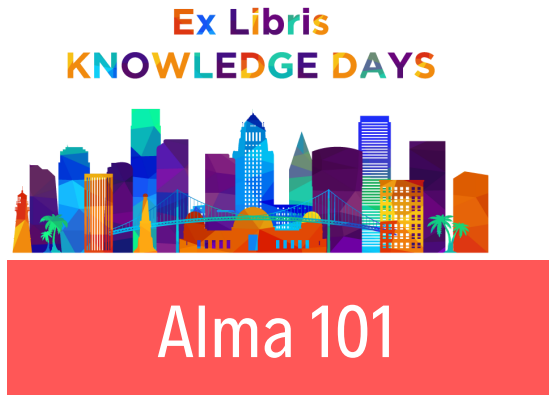
Managing Electronic Resources: The Basics Kevin Lane-Cummings	Designing and Using Normalization Rules Jenny Draeger	Opportunities in Analytics Connie Braun and Dominic Doneaux	CDI Hands-On Jean Cabaup	Key Considerations and Decisions Before Consortia Implementation Megan Drake
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Session #3	1:30pm – 3:00pm
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Fundamentals of Resource Sharing Steven Burke	Managing Electronic Resources: Advanced Topics Kevin Lane-Cummings	Investigate Alma Analytics for Acquisitions Connie Braun and Dominic Doneaux	Primo VE Normalization Clarice Shin & Paul McBride	Introduction to Alma Network Zone Topology Megan Drake
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Session #4	3:30pm – 5:00pm
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APIs and Integrations for the Non-Technical Amanda Schmidt	Advanced Resource Sharing Steven Burke	Exploring Alma Analytics for Fulfillment Connie Braun and Dominic Doneaux	Primo VE UI Customization Jean Cabaup	E-Resource Management and Workflows in the Network Zone Megan Drake
Fundamentals of Sets & Jobs in Alma Callie Mendoza & Yaala Ariel-Joel				



Alma 101	Alma 201	Alma Analytics	Discovery	Post-Implementation Configuration
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Alma & ProQuest Book Integrations Yaala Ariel-Joel & Jennifer Pierce		Reveal Alma Analytics for Resource Management Connie Braun and Dominic Doneaux		

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How to Use Acquisitions When You Don't Have Time For Acquisitions Jenny Draeger	Managing Electronic Resources: Advanced Topics Kevin Lane-Cummings	Overlap Analysis & Deselection Tools Yoel Kortick	Effective Usage of Primo Analytics Reports & Dashboards Jean Cabaup & Paul McBride	Refining Overdue and Lost Loan Profiles Ben Grimshaw
Letter Configuration & XSL Steven Burke			Advanced Discovery and Delivery of Your Digital Files Solutions Architect Team	

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