Alma Workshop Agenda

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	• Demonstration-led discussion *Note: hands-on exercises are not included and participant workstations or laptops are purely optional*
Expectations	• 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	• Revised or expanded understanding of workflows • List of action items for follow-up after the workshop

Day 1		
9:00 – 10:00	Introduction • Workshop overview & agenda • Inventory model, searching • User roles and tasks	All project members
10:15 – 12:30	Technical services overview • Fund structures • Vendors, accounts, interfaces, EDI • Overview of ordering (time permitting)	Technical services staff
Lunch		
1:30 – 2:45	Ordering • Order line types • Ordering lifecycle • Ordering physical one-time; physical subscriptions, electronic subscriptions • Other materials and order arrangements	Technical services staff
3:00 – 4:00	Receiving, activating • Receiving one-time • Receiving subscriptions (with/without prediction) • Activating e-resources • Services menu configuration: labels, display logic (time permitting)	Technical services staff
Day 2		
9:00 – 9:45	Invoicing • Invoicing lifecycle & integration options • Creating and editing invoices • Taxes	Technical services staff
9:45 – 10:45	Manual cataloging and record management • Post-receiving processing & work orders • Metadata Editor: templates, locked records, copy cataloging, form editor, headings, etc. • Authority control • Item editor	Technical services staff
11:00 – 12:30	Bulk catalog, inventory, and delivery maintenance • Import profiles • PDA/DDA • Bulk processing – records, inventory, order lines, users	Technical services staff

Lunch		
1:30 – 2:45	Fulfillment overview • Fulfillment policies & infrastructure • Lost item profiles and notifications • Blocks and overrides • Patron limits; loan limits	Fulfillment staff
3:00 – 4:00	User management and notices • User records: structure, ownership, synchronization • Registering new users • Customizing and testing notices	Fulfillment staff
Day 3		
9:00 – 10:30	Patron services • Loan, return • Fines and fees • Overriding blocks	Fulfillment staff
10:45 – 12:30	Requests and resource sharing • Placing and managing requests • Monitoring requests and work orders; hold shelf maintenance • Resource sharing models • Other requests: booking, digitization, office delivery, etc. (time permitting)	Fulfillment staff
Lunch		
1:30 – 2:45	Course reserves • Courses and reading list • Scan-in reserve management	Fulfillment staff
3:00 – 4:00	Wrap-up; Q&A; next steps	All project members