Alma Remote 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*
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
Outcomes	• Revised or expanded understanding of workflows • List of action items for follow-up after the workshop

Session 1: Technical Services – 2 hours (not including 1 break) **Monday, October 19, 2020 9:00 am**	
1 hour	Introduction – all staff • Workshop overview • Inventory model, searching • User roles and tasks
1 hour	Technical services overview • Fund structures • Vendors, accounts, interfaces, EDI
Session 2: Technical Services – 2.5 hours (not including 1 break) **Monday, October 19, 2020 1:00 PM**	
1 hour 30 minutes	Ordering • Order line types • Ordering lifecycle • Ordering physical one-time; physical subscriptions, electronic subscriptions
1 hour	Receiving, activating • Receiving one-time • Receiving subscriptions (with/without prediction) • Activating e-resources
Session 3: Technical Services – 2.5 hours (not including 1 break) **Tuesday, October 20, 2020 9:00 am**	
1 hour	Invoicing • Invoicing lifecycle & integration options • Creating and editing invoices • Taxes
1 hour 30 minutes	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
Session 4: Technical Services – 1.5 hours **Tuesday, October 20, 2020 1:00 pm**	
1 hour 30 minutes	Bulk catalog, inventory, and delivery maintenance • Import profiles • PDA/DDA • Bulk processing – records, inventory, order lines, users

Session 5: Technical Services – 1.5 hours **Tuesday, October 20, 2020 3:00 pm**	
1 hour 30 minutes	Technical Services Q & A
Session 6: Patron Services – 2 hours (not including one break) **Wednesday, October 21, 2020 9:00 am**	
1 hour	Fulfillment overview • Fulfillment policies & infrastructure • Lost item profiles and notifications • Blocks and overrides • Patron limits; loan limits
1 hour	User management and notices • User records: structure, ownership, synchronization • Registering new users • Customizing and testing notices
Session 7: Patron Services – 1.5 hours **Wednesday, October 21, 2020 1:00 pm**	
1 hour 30 minutes	Patron services • Loan, return • Fines and fees • Overriding blocks
Session 8: Patron Services – 2 hours (not including one break) **Thursday, October 22, 2020 9:00 am**	
1 hour	Requests and resource sharing • Placing and managing requests • Monitoring requests and work orders; hold shelf maintenance • Other request types: digitization, resource sharing
1 hour	Course reserves • Courses and reading list • Scan-in reserve management
Session 9: Patron Services – 1.5 hours **Thursday, October 22, 2020 1:00 pm**	
1 hour 30 minutes	Fulfillment Q & A