## Alma Workshop Agenda

Upstate Medical University, Syracuse NY  
Hosted by Upstate Medical Center Health Sciences Library  
http://library.upstate.edu/

| 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 terminals 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: December 11

<table>
<thead>
<tr>
<th>Time</th>
<th>Activity</th>
<th>Attendees</th>
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<tbody>
<tr>
<td>9:00 – 9:15</td>
<td>Introductions, Project Role Discussions and Training Plan</td>
<td>All project members</td>
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<tr>
<td>9:15 – 9:30</td>
<td>SUNY SMSP Working Group/Project Mgrs. Discussion of Resource Mgmt. Policies and Best Practices</td>
<td>All project members</td>
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<tr>
<td>9:30 – 9:45</td>
<td>SUNY Acq Working Group Policies and Best Practices</td>
<td>All project members</td>
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| 9:45 – 11:00 | Introduction & tech services overview  
• Workshop overview, goals, expectations  
• Inventory model & user roles             | Technical services & Acquisitions staff |
| 11:00 – 12:15 | Technical services overview  
• Fund structures  
• Vendors, accounts, interfaces, EDI  
• Overview of ordering                      | Technical services & Acquisitions staff |
| 12:15 – 1:15 | Lunch on your own                                                          |                        |
| 1:15 – 2:00 | Ordering  
• Ordering physical one-time; physical subscriptions, electronic subscriptions  
• Other materials and order arrangements                             | Technical services & Acquisitions staff |
| 2:00-2:30 | Acquisitions and Tech Services Q and A                                    | Technical Services & Acquisitions staff |
| 2:30 – 3:45 | Receiving, activating  
• Receiving one-time  
• Receiving subscriptions (with/without prediction)                           | Technical services & Acquisitions staff |
| 3:45 – 4:00 | Q & A and Next Steps                                                       | Technical services & Acquisitions staff |

**WELCOME RECEPTION:**  
5:00-6:30 Sheraton Syracuse University Hotel, Regency Room: Light food and non-alcoholic drinks provided; cash bar.
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<thead>
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<tbody>
<tr>
<td>9:00-9:15</td>
<td>SUNY IZ/NZ Discussion: E-Resources and Physical Resources</td>
<td>All Project Members</td>
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<td>9:15-10:00</td>
<td>Invoicing</td>
<td>Technical services &amp;</td>
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<tr>
<td></td>
<td>• Invoicing lifecycle &amp; integration options</td>
<td>Acquisitions staff</td>
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<td>• Creating and editing invoices</td>
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<td>10:00-11:00</td>
<td>Post-receiving Processing</td>
<td>Technical services &amp;</td>
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<td>• Managing Items in the Department</td>
<td>Acquisitions staff</td>
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<td>• Work Orders</td>
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<td>• Item Editor</td>
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<td>11:00-12:00</td>
<td>Activating, and record management</td>
<td>Technical services &amp;</td>
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<td></td>
<td>• Activating</td>
<td>Acquisitions staff</td>
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<td>• Licensing</td>
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<td>• Trials</td>
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<td>12:00-1:00</td>
<td>Lunch on your own</td>
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<td>1:00-1:45</td>
<td>Importing a bib record</td>
<td>Technical services &amp;</td>
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<td></td>
<td>• Import processing</td>
<td>Acquisitions staff</td>
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<td>• Bulk processing (normalization rules)</td>
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<td>1:45-2:30</td>
<td>Manual Cataloging / Metadata Management</td>
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<td>• Metadata Editor: templates, locked records, copy cataloging, form</td>
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<td>editor, headings, etc.</td>
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<td>• Bulk changes to holding and item records</td>
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<td>2:30-2:45</td>
<td>Break</td>
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<td>2:45-3:45</td>
<td>Working on items in batch</td>
<td>All Project Staff</td>
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<td></td>
<td>• Creating sets</td>
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<td>• Running jobs</td>
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<td>• Applying changes repetitively by scanning barcodes</td>
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<td>3:45-4:00</td>
<td>Q &amp; A and Next Steps</td>
<td>Technical services &amp;</td>
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<td>Acquisitions staff</td>
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<tr>
<td>Time</td>
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<tr>
<td>9:00 – 9:15</td>
<td>Access Services and Resource Sharing Working Group Policies and Best Practices</td>
<td>All project members</td>
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<td>9:15 – 10:00</td>
<td>Introduction &amp; Patron services overview</td>
<td>Fulfillment staff</td>
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<td>- Workshop overview, goals, expectations</td>
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<td>- Inventory model for Fulfillment</td>
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<td>10:00 – 10:45</td>
<td>Fulfillment overview</td>
<td>Fulfillment staff</td>
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<td>- Fulfillment policies &amp; infrastructure</td>
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<td>- Lost item profiles and notifications</td>
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<td>- Blocks and overrides</td>
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<td>- Patron limits; loan limits</td>
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<td>10:45 – 11:00</td>
<td>Break</td>
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<td>11:00 – 12:00</td>
<td>User management and notices</td>
<td>Fulfillment staff</td>
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<td>- User records: structure, ownership, synchronization</td>
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<td>- Registering new users</td>
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<td>- Customizing and testing notices</td>
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<td>Lunch on your own</td>
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<td>1:00 – 2:15</td>
<td>Patron services</td>
<td>Fulfillment staff</td>
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<td>- Loan, return</td>
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<td>- Fines and fees</td>
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<td>- Overriding blocks</td>
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<td>2:15 – 2:45</td>
<td>Fulfillment Q and A</td>
<td>Fulfillment Staff</td>
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<td>2:45 – 3:45</td>
<td>Course reserves</td>
<td>Fulfillment staff</td>
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<td>- Courses and reading list</td>
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<td>- Scan-in reserve management</td>
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<td>3:45 – 4:00</td>
<td>Wrap-up; Q&amp;A; next steps</td>
<td>Fulfillment staff</td>
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<td>9:00 – 10:00</td>
<td>Requests and resource sharing</td>
<td>Fulfillment staff</td>
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<td>- Placing and managing requests</td>
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<td>- Monitoring requests and work orders; hold shelf maintenance</td>
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<td>10:00-11:00</td>
<td>Resource Sharing</td>
<td>Fulfillment staff</td>
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<td>- Concepts (configuration, rotas, workflows)</td>
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<td>- Request lifecycles</td>
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<td>- End-to-End Workflow</td>
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<tr>
<td>11:00-11:30</td>
<td>Resource Sharing and Fulfillment Q and A</td>
<td>Fulfillment Staff</td>
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<td>11:30-12:15</td>
<td>Walk-in borrowing</td>
<td>Fulfillment staff</td>
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<td>- Loan and return to remote patron</td>
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<td>- Return in the wrong library</td>
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<td>Lunch on your own</td>
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<td>1:15 – 2:30</td>
<td>Analytics Overview</td>
<td>All Project Members</td>
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<td>2:30 – 2:45</td>
<td>Overview of SUNY Alma/Primo Support Model details by SUNY System Admin.</td>
<td>All Project Members</td>
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<td>2:45-3:45</td>
<td>Open Q and A for all topics.</td>
<td>All Project Members</td>
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<td>Wrap-up; Q&amp;A; next steps</td>
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