

# Ex Libris Knowledge Day

Monday, Aug 26

Alma 101

Alma 201

Alma Analytics

Primo

Leganto

Session #1

9:00am – 10:30am

**Optimize and Streamline Alma Workflows**

Megan Drake

**Tips and Tricks in Alma Analytics**

Yoel Kortick

**Leganto–Alma Copyright Management Including Regional Support**

Nir Sherwinter

Session #2

11:00am – 12:30pm

**Managing Electronic Resources in Alma: The Basics**

Melanie Fitter

**Designing and Using Normalization Rules**

Megan Drake

**Effective Usage of Primo Analytics Reports and Dashboards**

Yoel Kortick

Session #3

1:30pm – 3:00pm

**Managing Digital Resources in Alma: The Basics**

Miles Stauffer

**Managing Electronic Resources in Alma – Advanced Topics**

Megan Drake

**Primo VE Normalization Suite Overview**

Yisrael Kuchar

Session #4

3:30pm – 5:00pm

**Resource Sharing and Fulfillment Networks: The Basics**

Melanie Fitter

**Using Alma Analytics to Save Space and Financial Resources**

Yoel Kortick

**Display Configuration in Primo VE**

Bettina Schmid

**Leganto – Librarian Analytics Dashboard (45 min)**

Nir Sherwinter

Monday, August 26

# Session Info

9:00am–10:30am

## Optimize and Streamline Alma Workflows

*Megan Drake*

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.

## Tips and Tricks in Alma Analytics

*Yoel Kortick*

During this session we will review several topics and display tricks in building effective reports. After building the reports we will use them to create widgets, dashboards, and even schedule them to be sent to an FTP server.

Here are some of the topics we will discuss (time permitting) while creating the reports:

- Creating a prompt in a report
- Making a filter be case insensitive
- Changing the default "no results" message
- Using a regular expression in a report

- Displaying the total number of rows in a report
- Concatenating fields
- Perform a mathematical operation on two columns in a report
- Using CASE to change the text of results

## Leganto-Alma Copyright Management Including Regional Support

*Nir Sherwinter*

How to benefit from the Leganto and Alma copyright module to streamline your course-related copyright tasks.

In this session we will demonstrate the internal copyright flows and also review the external integration with the UK CLA's digital content store.

11:00am–12:30pm

## Managing Electronic Resources in Alma: The Basics

*Melanie Fitter*

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.

## Designing and Using Normalization Rules

*Megan Drake*

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.

## Effective Usage of Primo Analytics Reports and Dashboards

*Yoel Kortick*

Primo analytics can be used to obtain in depth knowledge of the library users.

By knowing what users are searching for, an effective collection management policy can be maintained.

By knowing how users are searching, an effective discovery interface can be designed. During this session we look at both of these aspects, and use default reports and dashboards, as well as customized original reports, to do so.

We will also use the reports to create widgets, reports and dashboards.

1:30pm–3:00pm

## Managing Digital Resources in Alma: The Basics

*Miles Stauffer*

Learn the various methods to deposit digital .

material into Alma, metadata management for digital records, multiple delivery options and integration with discovery and other systems.

### **Managing Electronic Resources in Alma - Advanced Topics**

*Megan Drake*

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

### **Primo VE Normalization Suite Overview**

*Yisrael Kuchar*

Primo VE Normalization Suite provides you powerful and easy to use tools to control the presentation of you data, extend search queries and offers additional facets to tweak the results. During this session you'll learn how to create your own discovery data. We will provide an overview of the various normalization options, display a demo and answer your questions.

**3:30am–5:00pm**

### **Resource Sharing and Fulfillment Networks: The Basics**

*Melanie Fitter*

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. Fulfillment networks are the newest addition to Alma's resource sharing options. In this session, we will discover this new flavor of resource sharing, talk about its benefits, and compare it with the other Alma resource sharing options.

### **Using Alma Analytics to Save Space and Financial Resources**

*Yoel Kortick*

*More and more institutions are looking for extra space in their libraries for additional activities. One way to free up space is to weed physical items or transfer them to remote storage. However, how can the library know what may be weeded or transferred? For this Alma Analytics has developed a new 'Titles' subject area as well as default dashboards and reports. In this session we will see how to perform overlap analysis between physical and*

electronic resources, as well as check their usage. Cost per use will also be investigated, again for both physical and electronic resources, with the goal of influencing an effective collection management policy.

### **Display Configuration in Primo VE**

*Bettina Schmid*

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

### **Leganto - Librarian Analytics Dashboard**

*Nir Sherwinter*

This session will review the various Leganto subject areas and focus on the librarian dashboard designed for comprehensive view of Leganto Analytics (45 min).

