

## 2025 Knowledge Day

### ABOUT CLARIVATE KNOWLEDGE DAYS

Clarivate Knowledge Day is an opportunity to take your understanding of our suite of products to the next level. You've gone through implementation, you've been using the product, now it's time to really fine-tune your workflows or explore ways to maximize your use of our products at your library.

### OPTIMIZE YOUR EXPERIENCE

Our products provide an amazing array of configuration options, and at Knowledge Day you'll learn how to utilize those features at your institution. We want you to come away with a concrete understanding of how to implement or optimize your workflows, be able to run reports that enable you to mine valuable intelligence from your library systems, and gain a greater understanding of system configurations that enable you to support your institution's goals.

### LEARN FROM EXPERTS

Our instructors are employees who are experts in their areas of work. You'll get the content you want, delivered by the people who know this software inside and out: our trainers, implementers, and product and support staff.

### DETAILS

Thursday September 18th, 2025  
 Complesso Universitario San Niccolò (University of Siena)

Slot	Session Title and Description	Presenter and Moderator	Resources
1	<p><b>Linked Data in Alma and Primo VE</b></p> <p>This session will present how Linked Data can:</p> <ul style="list-style-type: none"> <li>- Enhance search results and make resources easier to find</li> <li>- Be incorporated into online content relatively easily using well-known vocabularies</li> <li>- Provide an open interactive system, with external links and the ability to make information easily accessible, re-usable and with the possibility of serendipitous discovery of other resources.</li> </ul> <p>This session will also demonstrate existing functionality regarding Linked Data in Alma, including:</p> <ul style="list-style-type: none"> <li>- Viewing the Linked Data in Alma and Primo VE</li> <li>- Extracting Linked Data from Alma via general publishing profile</li> <li>- Extracting Linked Data from Alma via APIs</li> </ul> <p>Finally, we will also look at examples of Linked Data in Primo discovery interface with examples from Alma institutions. .</p>	<p>Yoel Kortick</p>	<p><a href="#">Slides #1</a></p> <p><a href="#">Slides #2</a></p>
2	<p><b>Configuring and Customizing Letters in Alma</b></p>	<p>Yoel</p>	<p><a href="#">Slides</a></p>

	<p>During this session we will cover various aspects of the letters configuration including but not limited to the following areas:</p> <ul style="list-style-type: none"> <li>- An overview of the "Letters Configuration" page</li> <li>- Customizing the appearance of the letters by modifying the XSL and customizing the labels</li> <li>- Previewing the letters with different data examples in sample XML files (without needing to send the letter to a recipient)</li> <li>- Saving the letter configuration in draft format before saving the final version</li> <li>- Adding conditional formatting to the letter, such as according to the library or an ordered item or the user group of a patron.</li> </ul>	Kortick	
3	<p><b>The new AI Metadata Assistant in the Metadata Editor</b></p> <p>The AI Metadata Assistant uses a Large Language Model generative AI to process information about a library resource and suggest relevant metadata to the cataloger to help make the cataloging process quicker and more efficient. The cataloger can then review the suggested data and accept, correct or dismiss it, as well as add more complex, expert metadata and library-specific metadata.</p> <p>During this session we will do real live examples of both creating and enriching records using the AI Metadata assistant. We will also see how the AI Metadata assistant can be used in conjunction with cataloging templates and normalization processes.</p>	Yoel Kortick	<a href="#">Slides</a>
4	<p><b>Primo VE Mixpanel User Engagement Analytics</b></p> <p>Mixpanel is a new Analytics platform for understanding how users behave within the Primo VE user interface and will be released as part of the "Next Discovery Experience" (NDE).</p> <p>Ex Libris has worked on Mixpanel together with customers focus group and early adopters throughout 2024, and there is a planned general availability release for 2025.</p> <p>During this session we will look at Mixpanel flows, Mixpanel insights reports, and using Mixpanel boards. We will also look at advanced functionality such as using regular expressions when filtering, and renaming and merging values in an Insights Report</p>	Yoel Kortick	<a href="#">Slides</a>
5	<p><b>Understanding the DEDUP and FRBR Processes in PrimoVE</b></p> <p>During this session we'll understand the processes and learn how to configure keys, troubleshoot and test tool</p>	Alessandro Fasoli	<a href="#">Slides</a>
6	<p><b>Contributing to the Alma Community Zone</b></p> <p>The goals of Community Zone contribution are:</p> <ul style="list-style-type: none"> <li>- To have high quality descriptive records in the Community Zone Catalog</li> <li>- To have both individual portfolios as well as entire collections which</li> <li>- Meet the needs of the community</li> <li>- Are added to the Community Zone at a speedy pace</li> </ul> <p>Therefore, Alma includes options to allow the library staff to play an active role and collaborate in the Community Zone.</p> <p>During this session we will cover the following topics:</p> <ul style="list-style-type: none"> <li>- Editing CZ Bibliographic records</li> <li>- Contributing Portfolios to the CZ</li> </ul>	Flavia Deluca	<a href="#">Slides</a>

	<ul style="list-style-type: none"> <li>- Contributing Local Electronic Collections to the CZ</li> <li>- The Community Zone Management Group</li> </ul>		
7	<p><b>Working with Local and Global Authorities</b></p> <p>While Alma includes (at the current time) 58 different authority vocabularies in the Community Zone, it is also possible to use local authorities which have a functional preference over the global authorities. During this session we will investigate how both the Global Authorities from the Community Zone as well as local authorities can be used.</p> <p>Topics we will cover include:</p> <ul style="list-style-type: none"> <li>- Why do we use authorities?</li> <li>- Global authorities in Alma</li> <li>- Local authorities in Alma</li> <li>- How does Alma know which vocabulary to use for subjects?</li> <li>- How does Alma know which vocabulary to use for names?</li> <li>- The difference between F3 and saving a record with linked bibliographic heading</li> <li>- The job "Preferred Term Correction"</li> <li>- The Authority Control Task List</li> </ul>	Lili Daie	<a href="#">Slides</a>
8	<p><b>Leganto Analytics</b></p> <p>Learn how you can use Leganto analytics, including Data Visualization Dashboards, to understand how students are engaging with course materials. This session will highlight specific reports that will help your library measure student engagement and demonstrate the impact your library has on the student experience.</p>	Jessie Ransom	<a href="#">Slides</a>
9	<p><b>Mastering the Transition to Primo NDE</b></p> <p>Join us for an essential practical session to guide you through the seamless transition from the current Primo UI to the cutting-edge Next Discovery Experience (NDE) UI. Discover how this powerful new interface can revolutionize the way your users interact with your library's resources.</p> <p>In this practical session, you'll learn:</p> <ul style="list-style-type: none"> <li>-The new features and enhancements of Primo NDE that will delight your users</li> <li>-Step-by-step strategies for testing and implementing the new interface</li> <li>-Best practices for a smooth migration that minimizes disruption to your library services</li> <li>-Tips and tricks for customizing the NDE to match your institution's unique needs-</li> <li>-Whether you're planning an immediate switch or preparing for the future, this session will equip you with the knowledge and confidence to successfully navigate this important transition.</li> </ul> <p>Don't miss this opportunity to stay ahead of the curve and ensure your library continues to deliver an outstanding user experience.</p>	Nili Natan	<a href="#">Slides</a>
10	<p><b>Overlap Analysis of Electronic Resources in Multiple Electronic Collections</b></p> <p>To achieve collection development analysis of libraries' electronic holdings, the Overlap Analysis Tool can be used to support multiple use cases.</p> <p>Some of the main use cases which we will look at in a live session are as follows:</p> <ul style="list-style-type: none"> <li>- When considering to order an electronic collection, which part of this electronic collection is already covered in other existing electronic collections. This can be used to avoid content overlap and purchasing of duplicate resources.</li> <li>- When considering to cancel electronic collections, what full text access would be lost if a resource were</li> </ul>	Flavia Deluca	<a href="#">Slides</a>

	<p>cancelled.</p> <ul style="list-style-type: none"> <li>- When the institution receives a file with a list of resources from a vendor which resources are and are not already in Alma.</li> </ul>		
11	<p><b>A Spotlight on Functionalities you can Enable to Maximize your Primo VE Experience</b></p> <p>This session will cover how to enable the new and exciting features that have been added to Primo VE in recent quarterly releases</p>	Ishay Ohayon	<a href="#">Slides</a>
12	<p><b>Using Normalization Rules to update Alma records in bulk</b></p> <p>During this session we will learn how normalization rules can be used to efficiently update bibliographic records as part of Alma workflows.</p> <p>We will cover:</p> <ul style="list-style-type: none"> <li>- normalization rule syntax</li> <li>- example use cases</li> <li>- demonstrations of processes.</li> </ul> <p>We will also look at the various places where the normalization rules can be applied such as</p> <ul style="list-style-type: none"> <li>- when saving a record in the Metadata Editor</li> <li>- when importing a record</li> <li>- when publishing (exporting) a record</li> <li>- on a set of records directly in the repository.</li> </ul>	Alessandro Fasoli	<a href="#">Slides</a>
13	<p><b>Exploring Agentic AI: From Concept to Action</b></p> <p>This session introduces agentic AI, explains how Clarivate integrates this emerging capability into its Academic AI platform and Ex Libris products like Alma and Primo, and highlights the opportunities for libraries to benefit from smarter, more adaptable automation and discovery tools. We'll begin with an introduction to the basics of agentic AI—what it is, how it differs from traditional automation, and why it matters for libraries. We'll look at how agents are built and at their components. This session is designed for library staff and technologists who are curious about the practical potential of AI—not just as a tool, but as a collaborative agent</p>	Christine Stohn	<a href="#">Slides</a>
14	<p><b>Advanced Normalization Rules Workshop (2.5 hours)</b></p> <p>During this advanced workshop we'll demonstrate the use of simple transformation commands and regex manipulation as well as tips and suggested approaches when addressing an NR challenge will be offered. There will be a sub-session of hands-on. A variety of challenges will be provided for participants to choose from. Solutions to all challenges will be handed out after the session. Target audience: Primo VE administrators with access to Alma with the Discovery Admin role.</p>	Ishay Ohayon	<a href="#">Slides</a> <a href="#">Exercises</a>