

Alma Insights

Upcoming Sessions

Session Name	Description	Registration APAC	Registration EMEA/Americas
More sessions Coming Soon.			

Recordings of Previous Sessions

Session Name	Description	Date	Recordings
Make the Most of the New Search UX	The new search interface is full of new capabilities and ways for you to save time and effort -- from enhanced configuration options, easily applying and re-using facets, improved navigation and the ability to do more from the search itself, be it catalogers' ability to browse between bibliographic records and mark a bib as suppressed, or inventory operators' ability to mark an item as missing or activate a portfolio while remaining in the search context. Come learn how to make the most of the new search.	October 23, 2025 Length: 61 min.	Recording
Fiscal Period Closure	Because fiscal period close is something that is typically done only once a year, a number of libraries find a refresher helpful. This session will review the fiscal period rollover process in Alma including ledger rollover and PO line rollover. Will your ledger structure need an update? The draft option can help with that. Alma has tools that help you roll over subscription orders, standing orders, and firm orders that are not yet complete into the new fiscal year so you can continue your work and maintain accurate encumbrances. After this session you will be prepared to confidently run your fiscal period close. Fiscal Period Closure Online Help	June 5, 2025 Length: 47 min. Presentation Visuals (slides)	Recording (Note: Captions on the recording were created by an automated system and are not entirely accurate.)

<p>WorldCat Connexion setup</p>	<p>Are you interested in how Alma can be integrated with OCLC Cataloging (e.g., Connexion)? Whether you're creating a new integration or want to know more about your existing configurations, this session will help you feel comfortable with connecting Alma to OCLC for cataloging. We'll cover both adding WorldCat as an external search resource as well as integrating Alma with programs like Connexion.</p>	<p>July 17, 2024</p> <p>Length: 34 min.</p> <p>Presentation Slides</p>	<p>Recording</p> <p>(Note: Captions on the recording were created by an automated system and are not entirely accurate.)</p>
<p>CDI Settings That Remove Duplicate eBook Records from Primo VE Search Results</p>	<p>When searching the CDI and the local collection in Primo VE, results may contain duplicate eBook entries. This session will cover both methods a library can use to remedy this situation and when one option might be preferable. The session will include an Alma analytics report you can run in your environment to verify if one method is currently in use.</p> <p>We will cover the setting “<i>Do not show as Full Text available in CDI even if active in Alma</i>” checkbox on the CDI tab of an electronic collection record.</p> <p>This presentation includes:</p> <ul style="list-style-type: none"> • Demonstration of duplicate eBook records in Primo VE • Methods to prevent duplicate eBook records • Use Alma Analytics to view settings in electronic collections • Disable setting in selected electronic collections • Exclude CDI eBooks in a Search Profile 	<p>October 19, 2023</p> <p>Length: 40 min.</p> <p>Presentation Slides</p>	<p>Recording</p> <p>(Note: Captions on the recording were created by an automated system and are not entirely accurate.)</p>
<p>An Introduction to Alma Import Profiles</p>	<p>Are you interested in streamlining your library's workflows by loading records in bulk? Import profiles in Alma can be used to add or update bibliographic and inventory records in batches, automate the acquisitions process, and facilitate ongoing e-resource management.</p> <p>This session includes:</p> <ul style="list-style-type: none"> • An overview of import profile types • Configuring an import profile • A demonstration using a Repository import profile 	<p>October 3, 2023</p> <p>Length: 52 min.</p> <p>Presentation Slides</p>	<p>Recording</p> <p>(Note: Captions on the recording were created by an automated system and are not entirely accurate.)</p>
<p>CDI Activation: EasyActive and FullyFlexible</p>	<p>Primo ensures that your patrons have access to as many resources as possible when they search your catalog. The expanded search functionality allows searchers to discover citations for resources that you don't own, so they can get a more complete bibliographic research set, and possibly initiate a resource-sharing request to access the content.</p> <p>The CDI (Central Discovery Index) activation model your Alma service uses -- EasyActive</p>	<p>Sept. 6, 2023</p> <p>Length: 38 min.</p>	<p>Recording</p> <p>(Note: Captions on the recording</p>

	<p>or FullyFlexible -- manages which citation resources are searchable and how they are activated. One model requires very little library-staff effort to provide extensive citation resources, while the other allows more control of the type of citation resources displayed to patrons but requires staff effort to maintain.</p> <p>This presentation will include the following:</p> <ul style="list-style-type: none"> • How to tell which CDI Activation model is configured in your Alma environment • How Primo and the CDI interact to provide resources to patrons • The functional differences between EasyActive and FullyFlexible • The outcomes of both activation models <p>Note: Staff at institutions that use the Summon discovery service do not need to attend this session. Summon uses a version of the EasyActive activation model and cannot switch models.</p>		<p>were created by an automated system and are not entirely accurate.)</p> <p>Presentation Slides</p>
<p>Community Zone and Central Discovery Index: Two Systems with One Goal</p>	<p>The Community Zone (CZ) and the Central Discovery Index (CDI) store different types of information. Alma libraries rely on the CZ to develop workflows and populate the Institution Zone. Discovery services display results from the CDI and are instrumental in delivery of electronic resources to patrons. This session will explain the different types of content in the CZ and the CDI, how the content is related, and how library staff and patrons interact with that information on a daily basis.</p>	<p>Dec. 14, 2022</p> <p>Presentation Slides</p>	<p>Recording</p>
<p>Using and Configuring the Alma General Publishing Profile</p>	<p>The Alma General Publishing Profile allows the institution to export data to an external system. The exported data can undergo many enrichment processes during the export. For example, normalization processes and indication rules can be used on the data. Additionally, the data can be enriched with Linked Data. Further, administrative data as well as inventory data can be added to the bibliographic records, which can be exported in a variety of formats. During this session we will investigate these various options and publish the data "live".</p>	<p>April 12, 2022</p>	<p>Recording</p>
<p>The New and Improved Alma Overlap Analysis Tool</p>	<p>Come join us in this webinar to learn how your institution can achieve better electronic collection development analysis using the New & improved Overlap Analysis Tool. This webinar will include a live demo of the new interface and functionality supporting use cases such as: Institution wants to acquire a new collection, but before doing so will like to check the overlap between the collection and the existing content in the library. Institution is considering cancelling a collection, before doing so will like to check the overlap between the collection and the existing content in the library.</p>	<p>March 29, 2022</p>	<p>Recording</p>
<p>Patron Blocks - Library Assigned and System Assigned</p>	<p>There are two types of "blocks" which may exist when a patron tries to loan, renew or make a hold request: "Librarian-assigned" and "System-assigned". During this session we will see how to configure these blocks to be either automatically or manually created, and what kind of influence they have on the patron activities.</p>	<p>March 8, 2022</p>	<p>Recording</p>
<p>Alma Normalization</p>	<p>This webinar will be moderated by Yoel Kortick of Ex Libris and delivered by Hanoch Roniger of the Hebrew University of Jerusalem. Hanoch is an East Asian Studies librarian with extensive experience in designing and using normalization rules and processes.</p>	<p>February 23, 2022</p>	<p>Recording</p>

Rules and Processes	Participants may submit questions in advance .		
Reading Room Functionality	Reading Rooms allow users to use items in a specified area (room) of the library, either once or several times for an extended period. During this session we will look at configuration options for the reading room, and demonstrate a full workflow of how the library can take advantage of this powerful functionality.	February 8, 2022	Recording
Using the Ex Libris Secure FTP service	<p>Many Ex Libris integrations, for example those of type “Finance” and “Users” as well as publishing profiles, use an FTP server. In order to allow institutions to use these integrations without locally owning and maintaining an FTP server, Ex Libris provides a “built in” secure FTP service. During this session we will show how to access and use the Ex Libris Secure FTP service, focusing on three areas:</p> <ol style="list-style-type: none"> 1.Setting up the connection to the Ex Libris Secure FTP Service 2.Connecting to the Ex Libris Secure FTP Service from your PC 3.Using the Ex Libris Secure FTP Service with Alma Integration Profiles 	January 11, 2022	Recording
Models for Setting up Circulation Desks	<p>During this session we will describe and show how to set up various models of circulation desks. The models will include, among others:</p> <ul style="list-style-type: none"> • A circulation desk that can only do circulation activities. • A circulation desk that can do circulation activities and also "Receive" items ordered via acquisitions. • A circulation desk that can do circulation activities and also act as a digitization dept. • A circulation desk that can register new users. • A circulation desk that can accept payments for fines and fees. 	November 9, 2021	Recording
Inventory Transfer Between Member Institutions of a Network Zone Consortia	This session is relevant for network zone consortia, both for the member institutions as well as the network zone administrators. This session is not relevant for standalone institutions.	October 20, 2021	Recording
Using Remote Storage in Alma	<p>Libraries may have remote storage facilities where some of their resources are stored. Patrons do not have direct physical access to these remote storage locations. Instead, a patron must place a request for an item that is in a remote storage facility. The requested item is then delivered to a location from which it can be picked up by the patron.</p> <p>During this session we will discuss and show different methods for setting up such a remote storage facility.</p>	September 14, 2021	Recording
	Data Visualization (DV) is available to all Alma institutions, and allows the instructions to	August 10,	Recording

Analytics Data Visualization in Alma and Primo	create reports (called "Projects" in DV) using advanced visualization features. We will take a look at many of these features and show how insightful projects can be created.	2021	
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