



# **Alma Education Services Catalog**

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# Ex Libris Alma Education Services Introduction

Welcome to Ex Libris Alma, the next-generation library services framework!

Getting acquainted with Alma and ultimately mastering the system is a formidable challenge even for the most experienced librarians; a challenge that can also prove to be quite rewarding.

Knowledge of Alma can be as broad and varied as the library profession itself, covering such areas as Acquisitions, Fulfillment, Resource Management, and General Administration. Each one of these areas consists of many subtopics that can be studied in great detail. These studies are only part of the picture, for there is no substitute for actual hands-on work with the system. You cannot learn Alma without using Alma (and vice versa).

To help you along the way, we have put together a comprehensive Alma education services program that ensures that you have access to the proper knowledge resources at each step of your Alma experience: from **Onboarding**, to **Implementation** and into your **Post Go-Live**, sustainment phase.

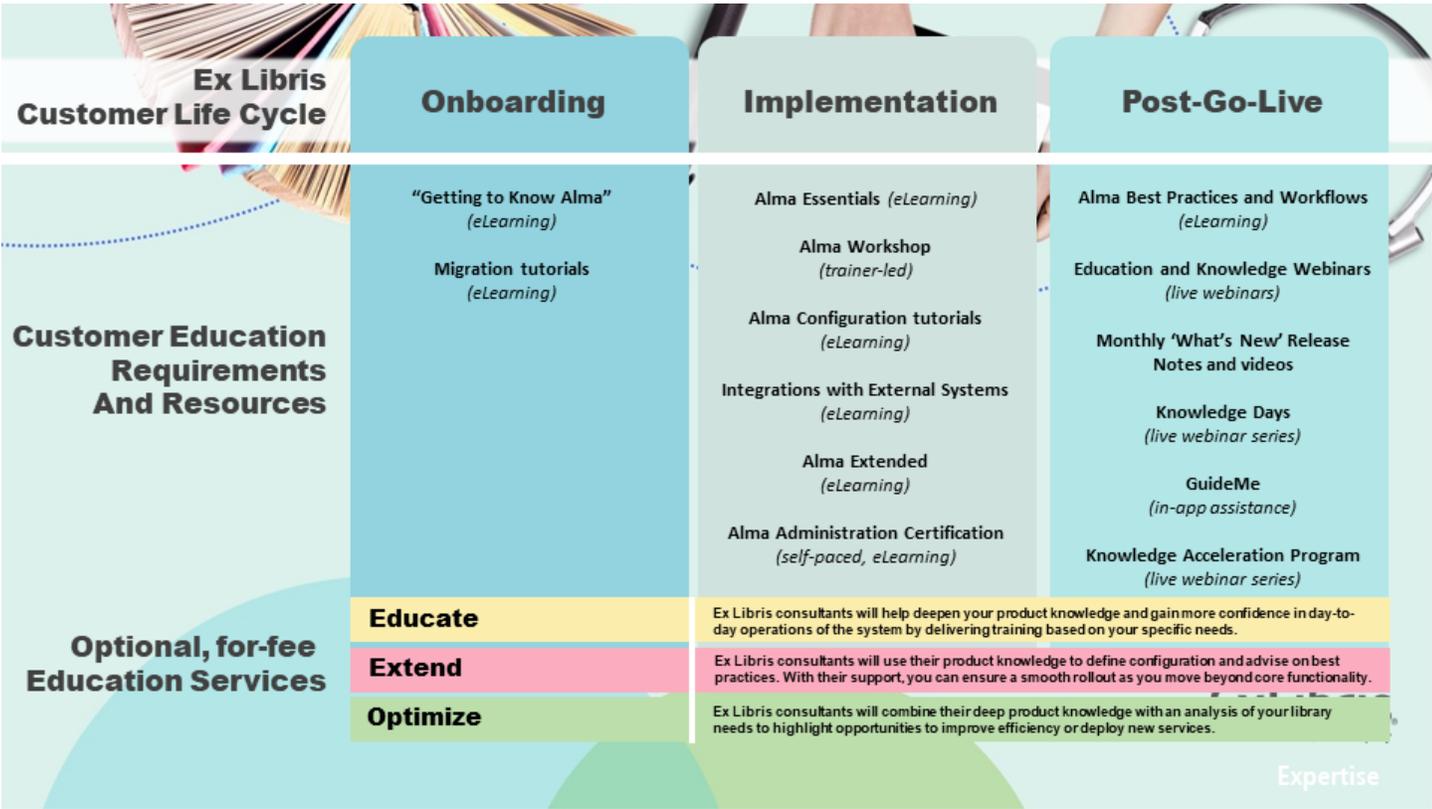


Figure 1. Education services and resources across the Alma lifecycle

We are dedicated to providing training that is relevant, comprehensive, just-in-time, and cost-effective. Our goal is to maximize the ROI and ease the adoption of Alma by delivering training that prepares your organization to successfully deploy and use Alma.

By utilizing our Alma knowledge resources, you can:

- Effectively plan for your Alma deployment
- Take advantage of flexible virtual training options
- Ensure a successful rollout of Alma at your organization
- Keep up-to-date on new features
- Extend the use of Alma’s many features and capabilities during life in production

## An In-Depth Look At Each Phase of The Customer Education Experience

### Onboarding

Ground yourself in basic Alma concepts and terminology in the major functional areas

- Complete the ‘Getting to Know Alma’ training series to get an introduction to Alma and learn about the major functional areas
- Practice using Alma in your sandbox, using the guided exercises provided in ‘Getting to Know Alma’

### Implementation

Learn how to work in each of Alma’s functional areas. Understand migration and configuration decisions. Become a Certified Alma Administrator.

- Watch Alma eLearning videos assigned during implementation: Essentials, Extended, Configuration, 3<sup>rd</sup> party integrations)
- Work with your Ex Libris project team to home in on site-specific questions and scenarios
- Participate in your institution’s Alma workshop and fine-tune your workflows
- Become a certified Alma Administrator by completing and passing the self-paced online training course and exam

### Post-Go-Live

Extend your use of Alma capabilities. Keep up with new monthly releases. Attend free live training and ‘Ask The Expert’ webinars

- Attend the Knowledge Acceleration Program series of live webinars, targeted for users who have gone live in the last 3-6 months
- Learn about enabling new Alma capabilities and implementing fresh workflows at your institution by checking out our eLearning catalog and Online Help on the Customer Knowledge Center
- Use GuideMe, a help tool layered over Alma that provides step-by-step guidance enabling just-in-time help on selected workflows

Figure 2. Major learning activities at each phase

## During Onboarding

Customers are expected to learn basic Alma concepts and terminology in the major functional areas. To facilitate customer learning, the [Getting to Know Alma](#) training series is intended to introduce customers to Alma functional areas, vocabulary, and day-to-day library workflows. The *Getting to Know Alma* series features short, easy-to-understand demonstrations that are accompanied by concise, step-by-step instructions to help you and your staff practice in your sandbox. The instructions may be downloaded in both PDF and Word formats, allowing you to easily incorporate these assets into your local training materials.

In parallel, your regional onboarding team will provide additional sessions on implementation-specific topics. A sandbox environment will also be provisioned and made available to all customers during this phase. Exploration and hands-on practice within the sandbox environment are highly encouraged for all our customers and is critical to knowledge and skill retention.

Customers who actively begin their product learning journey during this early phase will gain a head start on what will be one of the busiest phases of their deployment of Alma.

## During Implementation

Alma training typically kicks into high gear. Customers are expected to learn how to work in each of the core functional areas in addition to understanding the administrative fundamentals of Alma (see [Alma Essentials](#)).

Video tutorials on migration and configuration (see [Migration Tutorials](#) and [Implementation Tutorials](#)) are available to help guide customers towards making confident and informed choices around how their library data will be migrated, how Alma will be initially configured, and setting Alma up to integrate with external systems (see [Integrations with External Systems](#)).

Ex Libris follows the *'flipped classroom'* approach, where the library implementation team learns Alma via a combination of watching assigned eLearning content and working with the Ex Libris project team to review and home in on questions and site-specific scenarios not addressed in the recorded training.

An *Alma workshop* led by expert Professional Services staff typically takes place after the test load is delivered and is meant to clarify how current workflows translate onto the Alma platform, expand staff understanding of core functionality, and identify areas where configuration might require adjustment.”.

Finally, as part of the ramp-up towards Go-Live, we require at least two members from each Alma institution to undergo [Alma Administration Certification](#), an in-depth, self-paced program that covers the knowledge and skills needed to administer and manage Alma system configuration.

## In the Post-Go-Live and Production phase

Ex Libris offers several options for customers who want to keep up with the monthly Alma releases, are interested in learning more about other aspects of Alma and enabling even more of the platform functionality at their institution.

- The [Knowledge Acceleration Program](#) is a webinar series created specifically for libraries who have gone live with Alma in the last six months. This series of six live sessions will focus on a range of topics that libraries often look to optimize in their first year of production, including reviewing and adjusting configuration, Acquisitions workflows, maintaining resources, using Analytics and more.
- [Alma release notes](#) are published on our Customer Knowledge Center two weeks prior to the production release summarizing notable updates and bug fixes. New functionality is demonstrated in short “[What’s New](#)” videos, explaining what has changed and how to work with the new features.
- [Ask the Alma Expert](#): a live webinar series hosted by Ex Libris Alma product experts that’s a combination of lecture, demo, and live Q&A on various different topics and issues in Alma. Customer registration is required, and recordings of past webinars are archived and made available on the Customer Knowledge Center.
- [Alma LibGuide](#) is an index of our most popular training materials, organized by functionality area.
- [Alma Extended Training](#): Advanced topics and supplementary video tutorials on extended Alma functionality: course reserves, fiscal period close, booking, normalization rules amongst others.
- [Alma Analytics](#) introduces the basics of Analytics, and walks you through what you need to know in order to create, modify, run, and share reports and dashboards.
- [Alma Best Practices and How-Tos](#) is a library of valuable how-tos, workflow best practices, and learn how to get the most out of Alma
- [Alma Collaborative Networks](#) is a set of video tutorials designed to cover functionality unique to consortia customers.
- [Resource Sharing](#) is essential viewing for customers getting ready to implement resource sharing at their institutions.
- [Alma Digital](#) is a series of video tutorials that walks through the process of how to manage your digital resources in Alma. This training is intended for Alma customers who have purchased the Alma Digital add-on for managing digital collections directly in Alma.
- [GuideMe](#) is a help tool layered over Alma, providing step-by-step guidance enabling you to get just-in-time help on selected workflows.

## Optional, For-Fee Education Services

Once customers are comfortably in production, several options for sustaining and growing institutional expertise and knowledge in Alma are available for a fee.

- Ex Libris organizes our annual [Knowledge Days](#) webinar series that offers participants an opportunity to get more in-depth learning in our core products.
- Our [Premium Services](#) team provides varied services that you can choose from, including:
  - Customized training, delivered remotely or on-site
  - Assistance with implementing new or existing functionality
  - On-site engagements to help optimize your library's workflows and configuration

As Alma continues to evolve, our Education Services strategy is to ensure that our customers are provided with up-to-date, relevant and just-in-time training content. For more information, please contact the Global Knowledge Delivery team at [learn@exlibrisgroup.com](mailto:learn@exlibrisgroup.com)