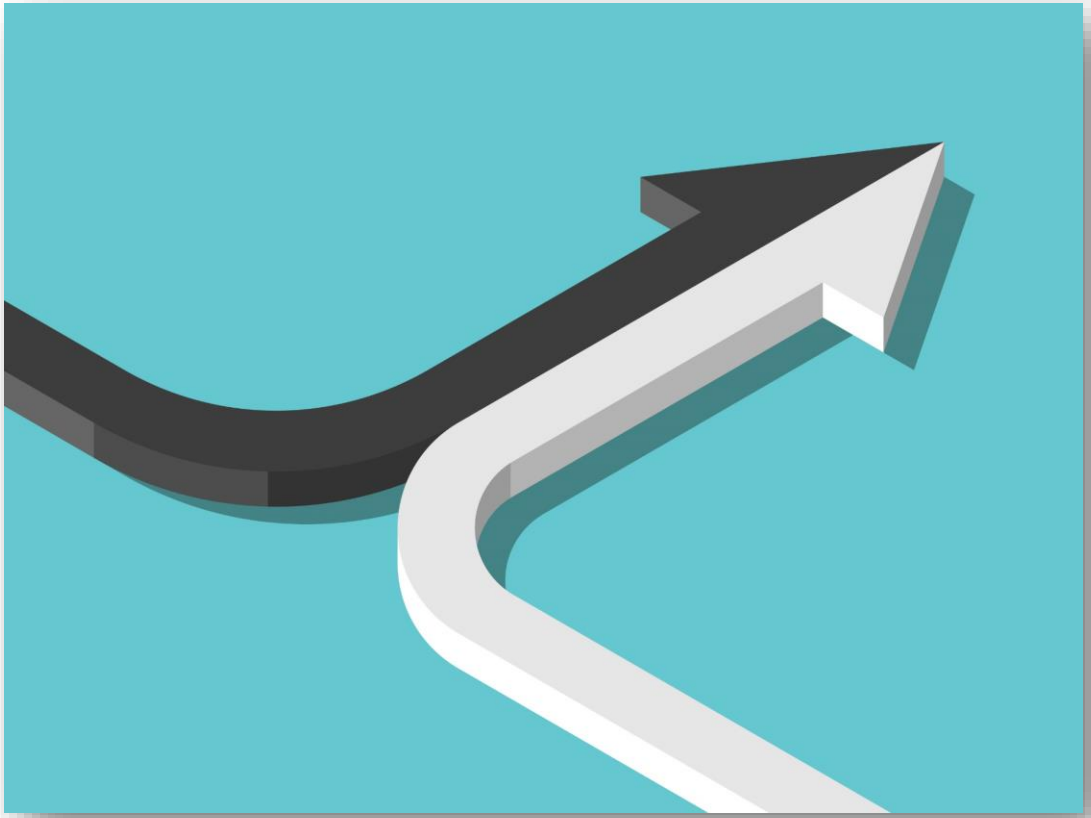
Alma Review 2021



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Welcome!

Jennifer Cornell, Manager
Customer Success, North America
BA, MLIS

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Meeting Objectives

After our Alma Review today, you will be able to…

- Recognize features of Alma that are indicators of strong Alma habits
- Identify areas of Alma not currently being optimized
- Prioritize embracing underused features
- Choose various resource paths to increase Alma knowledge and adoption

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Library Profile

- Medium Library
- 60 users with a designation of “staff”
- 31 active users (52%)—used Alma in past 30 days
- Live 2.33 years (7/16/2019)
- Premium Sandbox

Primo VE	Leganto	Esploro	Rapido	Rialto
Yes	No	No	RapidILL	No

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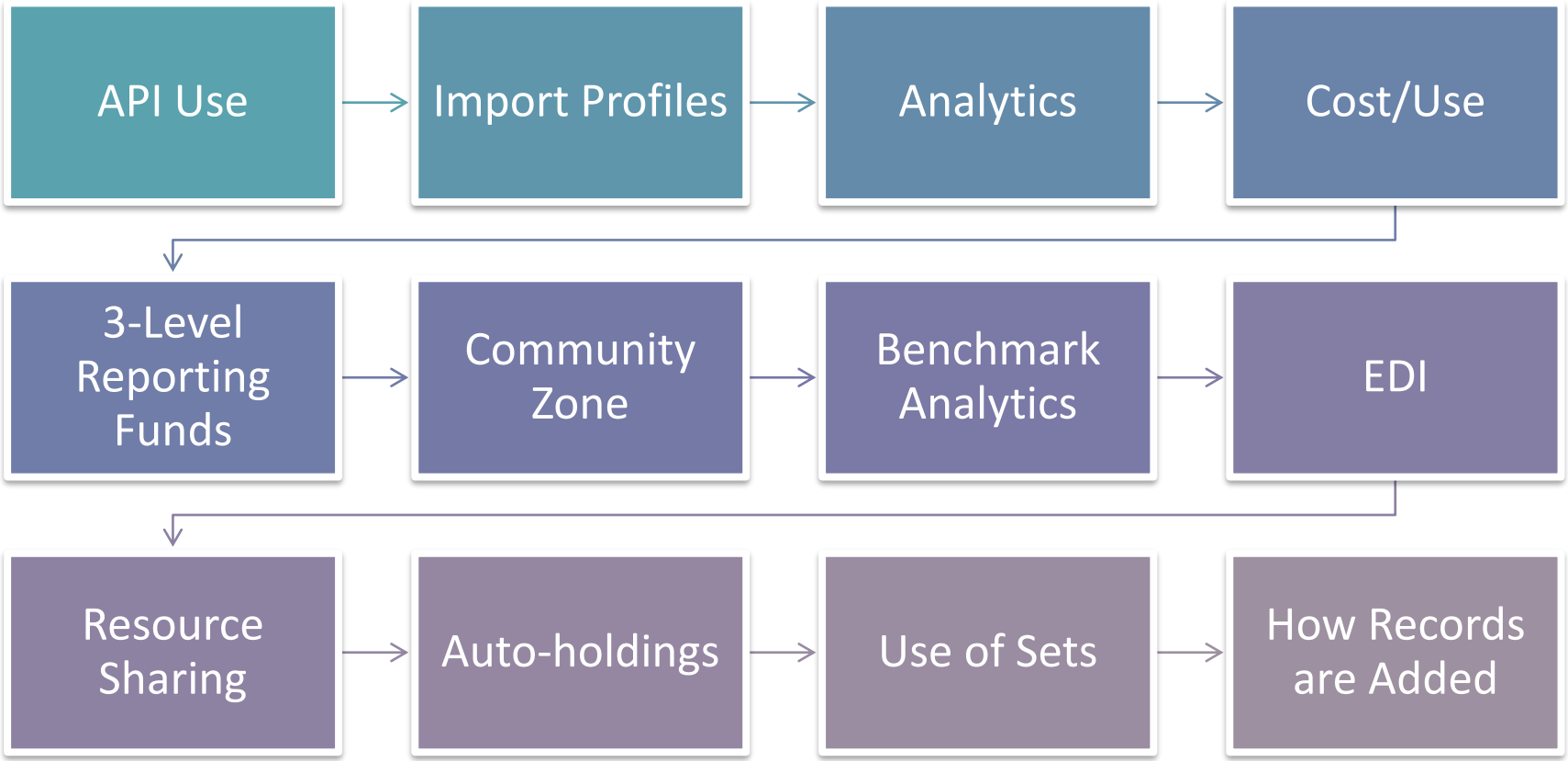
Adoption Benchmarks



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Adoption Benchmarks—Strengths

Use of CZ records

- 96% of records activated in Community Zone
- 0 % increase from last year
- Average of similar institutions = 82%

Autoholdings

- Using 3 out of 4
- Options: ProQuest Ebook Central, Springer***, Ovid***, Elsevier

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Adoption Benchmarks—Opportunities

Import Profiles

- 2 Scheduled Import Profiles (LibGuides and Ferris Institutional Repository—both Discovery)
- No change from last year
- Average of similar institutions = 14 Import Profiles

Use of Sets

- 59 Shared Sets
- Down 11% from last year
- Average of similar institutions = 100 Shared Sets

Analytics and Widgets

- 0 users using Scheduled Reports for Analytics
  - 22% of similar institutions
- 7% of users using widgets
  - 36% of similar institutions

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Adoption Benchmarks—More Opportunities

APIs and EDI

- Neither in use
- Both automate workflows

Benchmark Analytics

- Turned on, but is Ferris using?
- Knowledge Center Article

Cost/Use Awareness

- 75 reports harvested by SUSHI this year (barely any manually run)
- Decrease of 23% from last year
- ~145 SUSHI reports of comparable institutions

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Alma Release Info

- Alma Announcements in product
- Practice and test in the Sandbox

Make the Most of November's Release

Action Items

☐ Link Resolver ViewIt Online Service Order - Preference to Electronic Resources with Orders - You can now configure Alma Link Resolver to prefer electronic services for subscribed or owned electronic resources that are associated to Po Lines. For more information see General Electronic Services.

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Recommendations for the Ferris State University Team

- Configure Import Profiles to replace manual creation of POL
  - Also set up EOD and EDI
- Utilize sets to manage work in batches
  - Ex) publishing metadata in bulk, moving a group of records, or to run jobs
- Create analytics widgets for easy visualization of stats
- Learn about Analytics, determine baselines and goals
- Commit to automating workflows across the library—start here

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Benchmark Analytics—Learn more about your library

ORACLE Analytics

Help | Sign Out

KPI Dashboard

Home | Catalog | Favorites | Dashboards | Create | Open | Signed In As HE_13101820000231_4773_D_na04.alma.exlibrisgroup.com

KPI Watchlist | My Trends | Inventory Total | Inventory By Month | Loans by Month | Requests by Month | **Acquisitions** | Acquisitions - Electronic | Acquisitions - Physical | Borrowing Requests By Month | Lending Requests E

Institution Profile

Institution Type
- (All Column Values)
- NULL
- Academic
- Government
- Public
- Special
- Technical Trade School
- Unknown

Is Consortia Member Institution
- No
- Yes

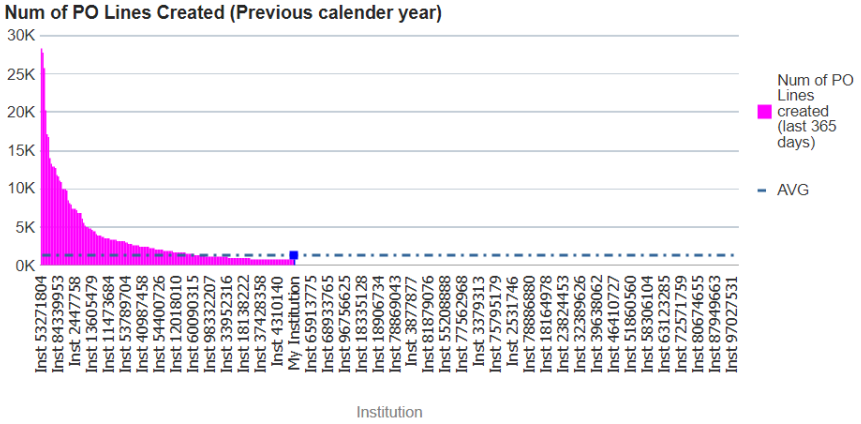
Main source of Library funding: (All Column Valu

Total annual amount spent on all materials: (All Column Valu

Total Undergraduate Student body size: (All Column Valu

Total Graduate Student body size: (All Column Valu

Num of PO Lines created	% POLs from API	% POLs from EOD import	% POLs from manual entry
718	8.22%	0.00%	91.78%
in previous year	in previous year	in previous year	in previous year



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Analytics—easily available

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Specific Knowledge Recommendations

- Alma Training Opportunities
  - Alma and/or Primo VE Administrator Certification
  - Analytics Modules
  - Alma Essentials
  - What's New Videos to summarize release notes
  - Extended Training, Advanced Topics
- Alma LibGuide
  - Categorized help with links to Knowledge Center articles and videos
- Premium Services
  - Optimize, extend, and educate to improve efficiency, build reports, and deploy new features or services.

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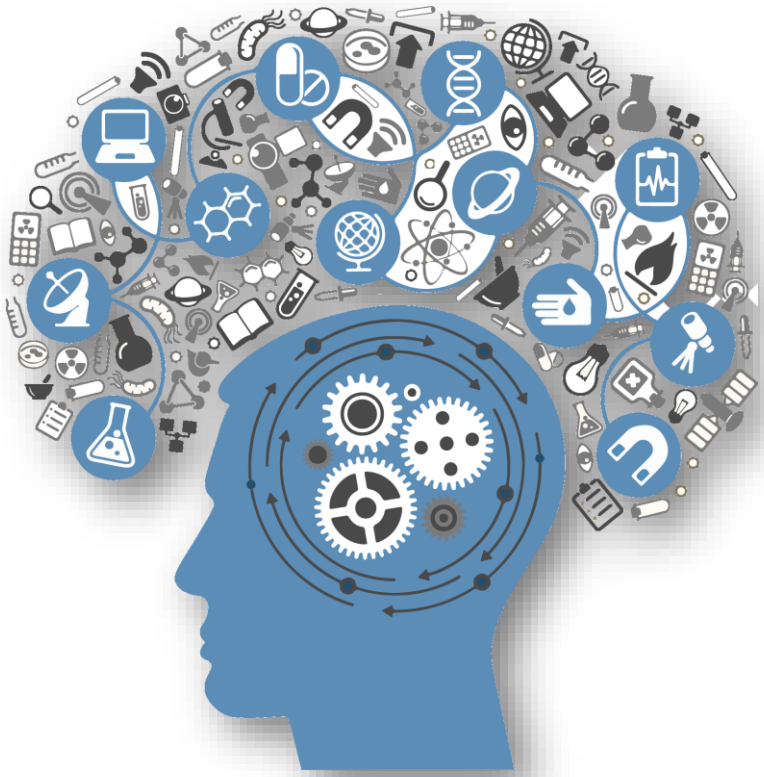

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Thank you!

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