



Developing Campus-Level Alma/Primo Training for Staff

February 12, 2020

www.suny.edu



Agenda

- Overview of models and tools
- How tech training is different than bibliographic/research instruction
- How to turn all this into local/campus-level training
 - Training Guides
 - SLSS Trainings
 - How-To Documents
- Q&A



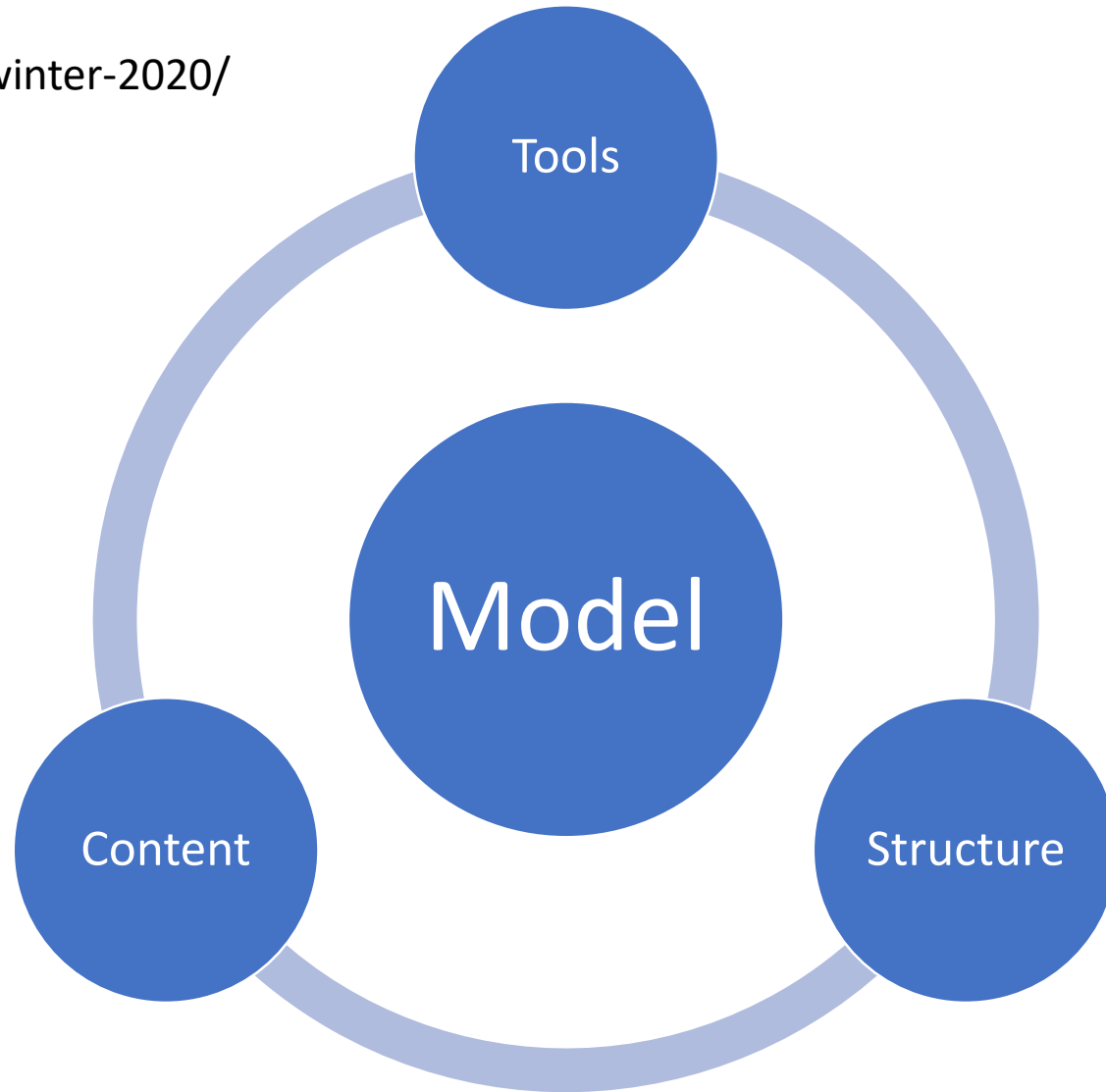
Elements of a Tech Training Program

How Tech Training is Different

How is tech training different than bibliographic/research instruction?

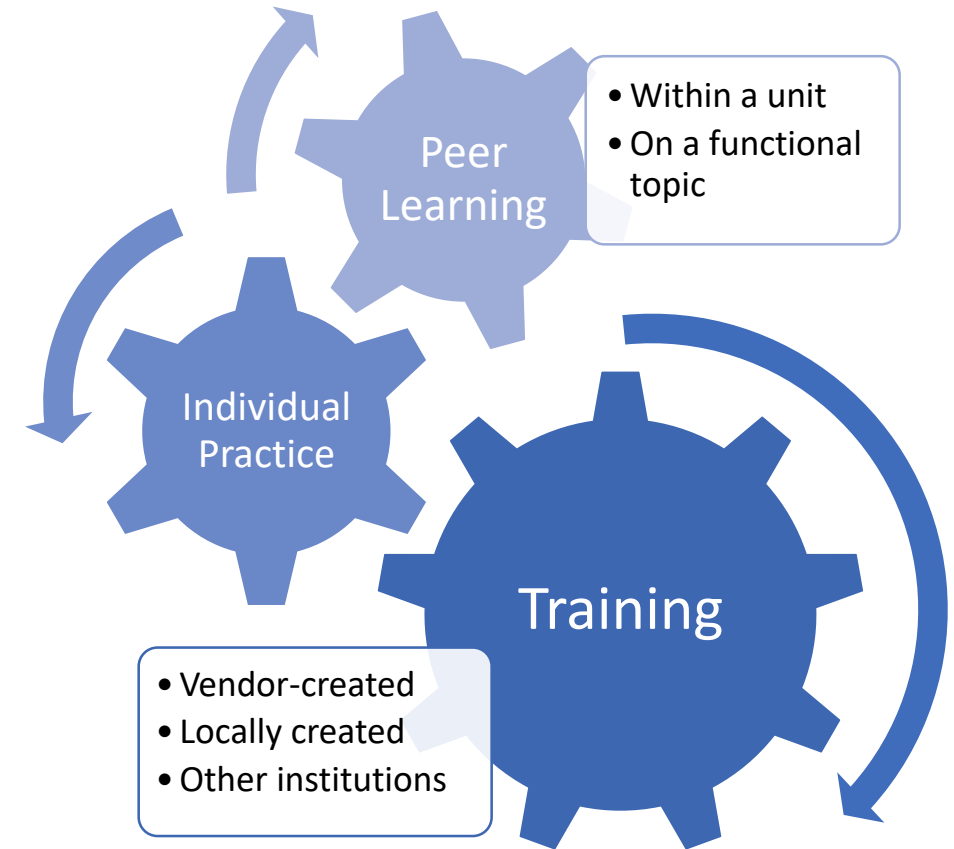
- Multiple goals/types of goals for the same program
- Diverse **end skill** needs, not just starting skill levels (and that's ok!)
- Part culture training and part skills training
- Learners are usually adults with decades of subject area experience, learning a new tool
 - Not teaching or discussing the functional area, just how to use the tool for those functions
 - May lead more quickly to policy/procedure/workflow tangents

<http://sunyla.org/sunyla-midwinter-2020/>



Models of Training

- **High-Touch** – lots of hands-on, customized content; detailed formal support for staff; highly structured
 - UPenn’s handouts:
<https://guides.library.upenn.edu/alma> !!!
- **Medium-Touch** – Anywhere in between
- **Low-Touch** – Use mostly/only vendor-provided materials; self-paced & self-directed; mostly online + vendor in-person; most useful for tech-comfy staff



Structure & Content

- Develop a Curriculum – break it into classes and sequences
 - General sessions for all staff: search, sets, jobs, item records, etc.
 - Functional areas >> Record or process lifecycles >> Specific features/needs
- Full-time or Volunteer trainers (“Train the Trainer”), or a mix?
- Standardized scripts/outlines or locally-created?
 - If locally-created, how do you ensure consistency?
- Content sources:
 - Customized for your institution/consortium
 - Ex Libris documentation & training materials
 - Other institutions (use w/attribution)

Tools

- Ex Libris Visits and Materials
- In-Person/Hands-on Trainings
- Individual Practice
- Informal Peer Support
 - Mentors or “buddies”
 - Learning Circles, Working Groups
- Web-Based Training
 - Webinars
 - Small Group Working Sessions
 - Short Videos
 - Documentation
 - Training Guides
 - Step-throughs
 - Reference lists
 - Policy



Search under current path



Alma

Home » Alma



Community Knowledge

Learn from other customers' experience, access customer contributed articles and share your own expertise



Content Corner

Alma Community Zone



Product Documentation

Access the latest documentation for Ex Libris products



Training

Learn new skills and get certified with our tutorials, recorded training and other materials



Release Notes

Stay informed about the features and capabilities included in each product release



Knowledge Articles

Answers as provided by our product analysts, to commonly raised questions.



Product Materials

Learn more about our product offerings, and how they can serve your needs



Implementation and Migration

Understand methodology and requirements to facilitate successful implementations

Training

Getting to Know Alma

If you're just getting started with Alma, watch this series to learn the basics in Alma.

Alma Essentials

The Alma Essentials training is the primary way to learn how to work with Alma. Alma Essentials kit, developed in English, is translated to Spanish, French and Simplified Chinese

Alma Administration Certification

Alma Administration Certification prepares Administrators and Systems Librarians to respond to Alma library configuration requests. Certification is a required part of Alma implementation at your library, although any Alma users at your library can watch the training sessions.

Alma Collaborative Networks (Alma Consortia)

The Alma Collaborative Networks training sessions show how to make use of Alma with your consortium, including the network institution, the Network Zone, acquisitions, cataloging, resource sharing, and much more.

Resource Sharing

These sessions introduce and detail the three models of resource sharing in Alma: broker-based, peer-to-peer, and fulfillment networks. Sessions cover resource sharing background, staff workflows, and configuration. These are useful for independent institutions as well as those in a collaborative network (Alma consortium).

Extended Training

Advanced Alma Topics and Supplementary Training

Other Support Options:

ProQuest Support

Case Edit

Case Edit

Submit Add attachment & Submit Cancel

Case Details

Messages and Alerts

[Link to Salesforce Documentation](#)

[Escalation Policy](#)

[Case Status Definitions](#)

[Contact Us](#)

Welcome, Suny Alma-Primo

Account Name State University of New York (SUNY) Sub Account

Asset

Affected Environment Production Environment

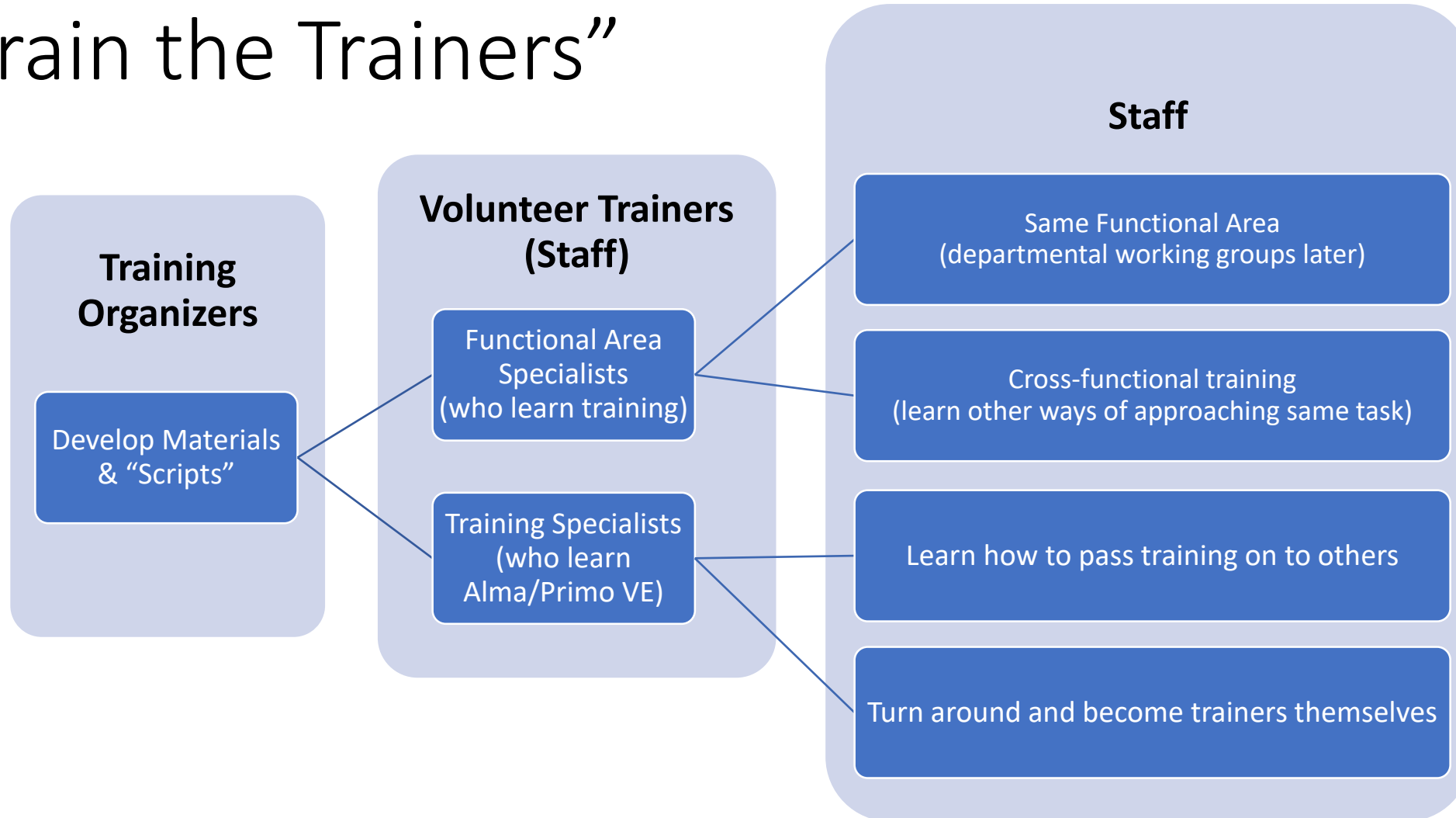
Priority Normal

Publish to all

Database Collection



“Train the Trainers”



In-Person/Hands-On Trainings

- Best way for most people to learn new technology/platforms
- Logistics-heavy unless you have infrastructure in place already for staff learning (still worth it)
- Considerations:
 - Trainer + Facilitator(s) for more complex topics
 - “Teach the tool” – you’re not teaching people how to do their jobs, you’re teaching them a new tool
 - Distinguish between policy/procedure and “this is how Alma works”

Web-Based Training

- Video
 - Webinars
 - Small group working sessions
 - Videos (short!)
- Documentation
 - Training guides
 - Step-throughs
 - Reference lists
 - Policies

The screenshot shows the SUNY Libraries Consortium website. At the top right, there are navigation buttons for SLC, Shared LSP, News, Training, and FAQs. The main header includes the SUNY Libraries Consortium logo and a breadcrumb trail: SUNY Libraries Consortium / SLC Guides / Training / Alma & Primo VE Training / Getting Started. The page title is "Alma & Primo VE Training" with the subtitle "Your starting point for training in Alma and Primo VE." A search bar is located on the right. A left-hand navigation menu lists various resources, with "Alma Search and Navigation" and "Alma Sets & Jobs" highlighted. The main content area is titled "Getting Started with Alma / Primo VE Training" and provides instructions on how to use the guides. It includes a numbered list of steps: 1. Read the Alma Search and Navigation guide; 2. Click on the Alma Functional Area Guides main page; 3. Click on the Functional Area Guide for the subject you need; 4. Repeat for each functional area; 5. If needed, read the Alma Sets & Jobs and Alma Configuration Training guides. Below this is a section for "Alma / Primo VE Training Calendar" showing a calendar for January 2020 with a table of dates.

SUNY Libraries Consortium

SLC Shared LSP News Training FAQs

SUNY Libraries Consortium / SLC Guides / Training / Alma & Primo VE Training / Getting Started

Alma & Primo VE Training

Your starting point for training in Alma and Primo VE.

Getting Started

Getting Started with Alma / Primo VE Training

Alma / Primo VE Training Calendar

Alma/Primo VE Presentations & Resources

Ex Libris Resources

Training Materials from Other Institutions

Alma Search and Navigation

Alma Sets & Jobs

Alma Functional Area Guides

Discovery / Primo VE Guide

Alma Configuration Training - Coming February 2020

Implementation Period Training (2018-2019)

Getting Started with Alma / Primo VE Training

Here's how to use this guide and the functional area guides to create your own, tailored Alma and/or Primo VE training:

1. Read the **Alma Search and Navigation** guide
2. Click on the **Alma Functional Area Guides main page** and read the overview.
3. Click on the Functional Area Guide for the subject you need. The guide will open in a new tab or window in your browser.
 1. **Read** through the guide
 2. **Watch** any Training Videos listed in the guide
 3. **Try** any examples or exercises listed in the guide
 4. **Practice** what you've learned in Alma or Primo VE
4. **Repeat** for each functional area you need training on.
5. If needed, also read the **Alma Sets & Jobs** and **Alma Configuration Training** guides.

You can also review the Ex Libris documentation and training available for any functional area, or training materials from other institutions. See the boxes further down this page for links.

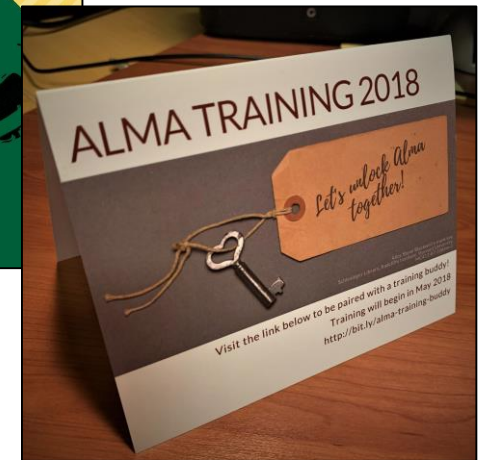
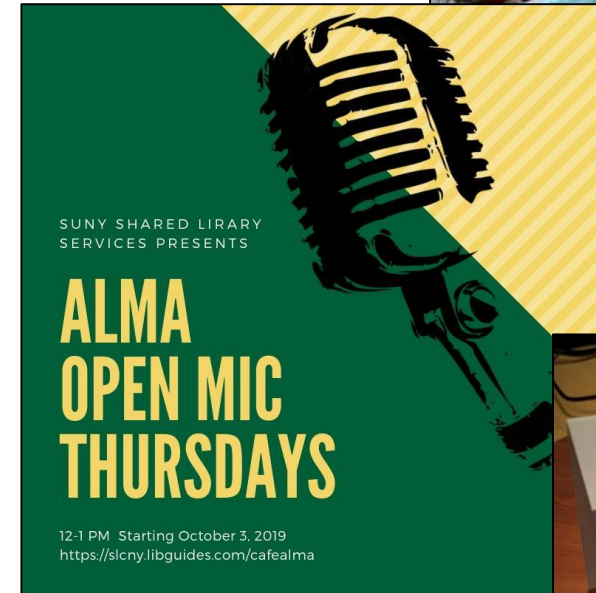
Alma / Primo VE Training Calendar

< > Today January 2020 Agenda Day Week Month

Mon	Tue	Wed	Thu	Fri
30	31	1	2	3

Informal Peer Support

- Discussion lists or forums
- Working Groups/“Gardening Glove” sessions
- Learning Circles, Circles of Practice
 - Café Alma as an online learning circle
- Mentors
- “Buddies” – like workout buddies, only for going through training!



Practice!

- Sandboxes, then live sites
- **You will not learn everything you need just by attending or watching training**
- **CARLI:** <https://www.carli.illinois.edu/products-services/i-share/alma/sandbox> , especially the Best Practices at the bottom
- **UPenn:** <https://guides.library.upenn.edu/alma>



Bringing It All Together for Campus-Level Training



Bringing it All Together – Intended Audiences

- New Staff
 - Systematic approach to all relevant Alma material
 - Assuming no knowledge with the system or with SUNY
 - Self-paced but needing more handholding/monitored learning
- Refreshers/New Roles for Existing Staff
 - More curated needs for material
 - Assuming some knowledge of Alma/Primo VE, SUNY, or both
 - More individual learning and very self-paced, but may require faster ramp up

Bringing it All Together – Local Training Models

- I – All self-directed, report back to manager, no formal local peer support,
- II – Some self-directed, some formal training; gardening glove/ learning circle sessions (online or in person)
- III – Mostly formal training in larger groups, formal peer learning opportunities/working groups
- IV – Fully supported formal hands-on training, regular centrally-organized peer learning opportunities

This is a range – something is better than nothing

Bringing it All Together – Use the Tools

- Turn guides into hands-on training, using the how-to doc & SLSS workflow as suggestions
- Encourage staff to participate in SLSS trainings
- Getting the most from Café Alma, Basecamp, and Salesforce
- Use peer learning/learning circles to discuss local practices and work through specific examples and issues
- Look to other institutions for ideas



SUNY Alma/Primo Training Guides

- Self-guided individual learning
- Use them as the “textbook” for in-person or online training
- Use the content and structure to develop your local training, augmented with local practices, policies, and examples
- Mix with Ex Libris and SUNY Shared Services training and documentation for any of the above
- Use as the homework or pre-reading for local discussions on policy, procedure, or training needs



Alma & Primo VE Training

Your starting point for training in Alma and Primo VE.

Getting Started ▾

Alma Functional Area Guides

Functional Area Guide Overview

Fulfillment Guide [↗](#)

Resource Sharing Guide - Coming
February 2020 [↗](#)

eResourcesGuide - Coming February
2020 [↗](#)

Resource Management Guide -
Coming February 2020 [↗](#)

Acquisitions Guide - Coming April
2020 [↗](#)

Analytics Guide [↗](#)

Discovery / Primo VE Guide [↗](#)

Alma Configuration Training - Coming
March 2020 [↗](#)

Functional Area Guide Overview

Use the navigation menu on the left to visit the Functional Area Guide you need to learn more about. The guides will open in a new tab or window.

Each guide is separated into pages on main topics, with boxes for sub-topics.

Each page contains:

- An introduction to the topic
- Links to training videos on that topic
- FAQs or lists of FAQs about the topic
- Additional information about each sub-topic
- Examples to try or suggested practice activities

How to Turn Tech Stuff Into Training Doc

- Chunk wisely
- Find narratives
- “Teach the Tool”
- Designate time for tangents (especially on local policy & workflows)
- Hands-on whenever possible, with lots of time for practice during and after the session
- More at <https://public.3.basecamp.com/p/JPL8a7pseBKYzqv3hpTinzsm>

Training Calendar

- What's Available?
 - Online/webinars
 - Online/longer courses
 - In-person
- <https://slcny.libcal.com/calendar/training/>

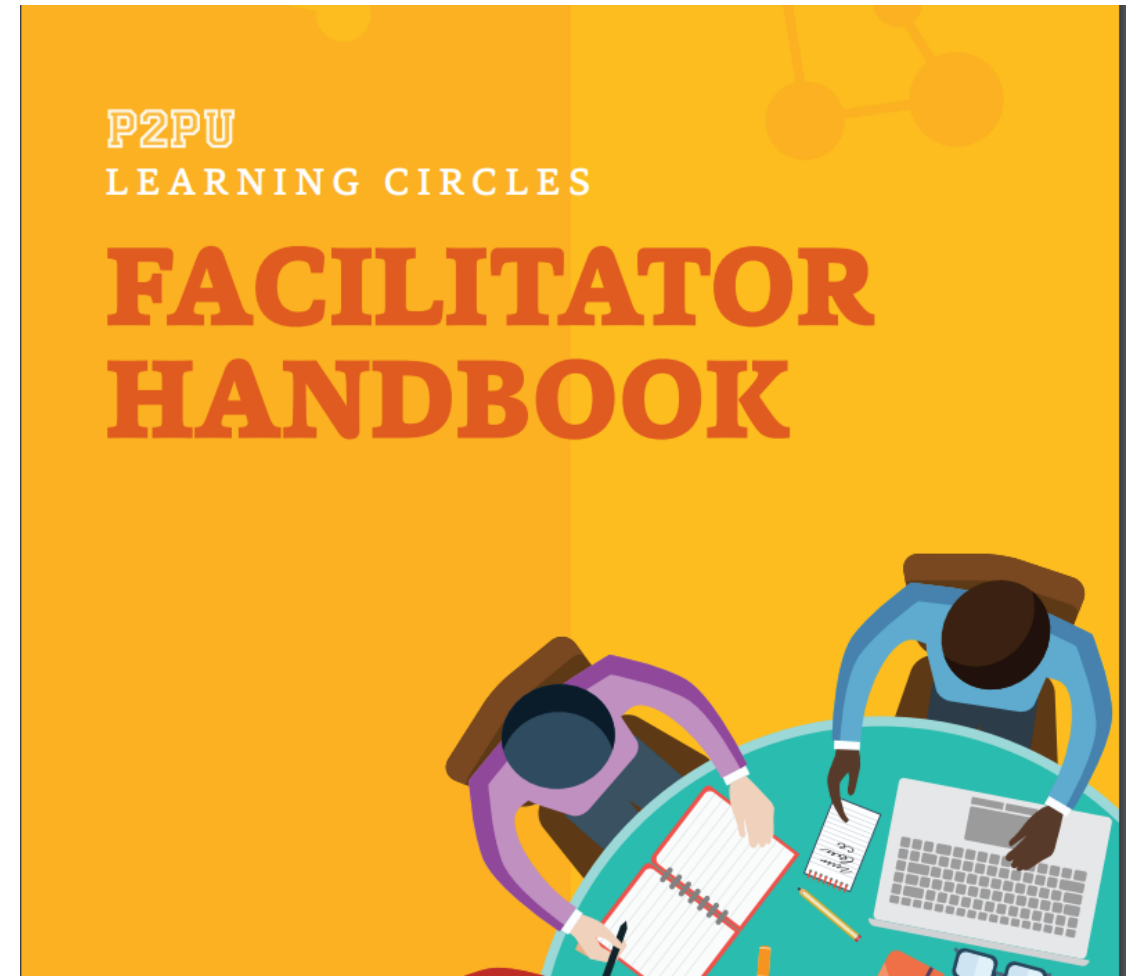
Monday	Tuesday	Wednesday	Thursday	Friday
Feb 3	Feb 4	Feb 5	Feb 6	Feb 7
	Fulfillment Analytics Online Training/Webinar 1:00pm	Basic Discovery: Discover Discovery Online Training/Webinar 11:00am	Advanced Indication Rules Online Training/Webinar 10:00am	
Feb 10	Feb 11	Feb 12	Feb 13	Feb 14
	How to Configure Overdue and Lost Loan Profiles Online Training/Webinar 1:00pm	Basic ERM: Searching for E-Resources in Alma Online Training/Webinar 11:00am	Relinking Closed POLS to a New Bib Record Online Training/Webinar 10:00am	Using Alma to Manage e- resource Renewals Online Training/Webinar 2:00pm
		Developing Campus-Level Alma/Primo Training for Staff Online Training/Webinar 1:00pm		
Feb 17	Feb 18	Feb 19	Feb 20	Feb 21
	Alma Analytics - Working with Column Properties and Layout Views Online Training/Webinar 11:00am	Advanced Discovery: Authentication and My Account Online Training/Webinar 11:00am	Claims Processing within the Acquisitions Workflow Online Training/Webinar 10:00am	
Feb 24	Feb 25	Feb 26	Feb 27	Feb 28
	How to Configure and Use Reading Rooms Online Training/Webinar 1:00pm	Advanced ERM: Setting up Discovery Import Profiles Online Training/Webinar 11:00am	Resource Management Analytics Online Training/Webinar 10:00am	

Café Alma, Basecamp, Salesforce

- Reassurances you can get from your peers:
 - You're not alone in learning Alma/Primo VE
 - It may not just be you or your campus having issues
 - No, you're not an idiot – parts of Alma can be complex or deeply connected
- Sanity-checking, walking through an issue or scenario
- Real-world examples, including configuration & code details
- Talking to a person
- Trying out ideas: “What do you think of...?” or “Would this work?”

Learning Circles

- Watch Ex Libris or SLSS videos
- Read Ex Libris documentation
- Come together to work through real-life, local examples



<https://www.p2pu.org/en/facilitate/>

Williams College & Sonoma State (CSU)

Coordinating staff training during implementation

Shriver, Emery (2017) *Coordinating staff training during implementation*. In: ELUNA 2017 Annual Meeting, May 10-12, 2017, Schaumburg, Illinois.



[PDF \(Presentation slides\)](#) - Published Version
Restricted to Registered users only
1MB

Abstract

When Williams migrated to Alma/Primo in Summer 2016, we needed an easy way to distribute Ex Libris training materials to our staff. We decided to use Canvas, a learning management system, to organize, disseminate and track staff training. Hear about what worked, what didn't, and how effective the "flipped classroom" training model was for our implementation.

<http://documents.el-una.org/1514/>

- CMS provides structure
- Vendor documentation for content

<http://documents.el-una.org/1639/>

When staff become students: Using a Course Management System for Alma training

Krier, Laura (2017) *When staff become students: Using a Course Management System for Alma training*. In: ELUNA 2017 Annual Meeting, May 10-12, 2017, Schaumburg, Illinois.



[PDF \(Presentation slides\)](#) - Published Version
Restricted to Registered users only
9MB

Abstract

When the CSU Libraries decided to migrate to Alma, I suspected the most challenging part of the migration would be training staff. How do you approach such a huge training task when most of the people in libraries are already overworked? People need to be able to access training materials in a way that fits into their schedules. Course management systems offer an excellent option for asynchronous learning and tracking participation. In this session, I'll walk through some of the CMS tools I used to create our Alma Training course at Sonoma State. I'll talk about what worked and didn't work in the training process, and how our approach evolved over the course of implementation. I'll demonstrate some of the features of our CMS, Moodle, and talk about similar features in other CMSs. I'll talk about how to apply pedagogical best practices to Alma training, and how to use some of the skills many librarians already have and apply them when developing Alma trainings.

<http://documents.el-una.org/1527/>

Minnesota State

Alma/Primo Training Update
February 4, 2019

Home PALS > Alma > Alma/Primo Training Update

04 FEB 2019 LINDA RICHTER ALMA

This week the PALS Staff will begin a series of webinars and Q&A sessions to assist you in making the most effective use of Alma and Primo. Many of the sessions being held during the first two weeks of February are Q&A sessions. As you work with Alma and Primo, begin to jot down your questions so you can bring them to the sessions.

The full training schedule is [here](#).

https://www.mnpals.org/training-february_4_2019/

Alma/Primo Training Plan Updated 3/14/2019

*****Note: The Primo Q&A training scheduled for March 21 has been changed to 3:00.**

Following is the training being offered by the PALS staff to help library staff make effective use of Alma and Primo.

Most of the training will be done via webinars. Sessions will be recorded for those that cannot attend or those that wish to review the training at a later time.

In addition to the webinars, we are planning in-person training beginning in late March. Watch for more information.

Monday, February 4, 3:00 – 3:30

- ❖ Topic: What's Wrong: Figuring out why an item isn't loaning as expected
- ❖ Intended Audience: Configuration Staff and others who are interested in why item is not loaning correctly
- ❖ Presenter: Etta Thornburg
- ❖ Link: <https://webmeeting.minnstate.edu/ettathornburg>

Tuesday, February 5, 10:30 – 11:30

- ❖ Topic: Films on Demand import training
- ❖ Intended Audience: Library staff who will need to import MARC files from Films on Demand and anyone interested in learning more about import profiles.
- ❖ Presenter: Dani Kroon
- ❖ Link: <https://webmeeting.minnstate.edu/danielakroon>

Resources

- **Training Guides**

<https://slcnny.libguides.com/lsptraining>

- **Training Calendar**

<https://slcnny.libcal.com/calendar/training/>

- **Developing Alma/Primo VE Training**

<https://public.3.basecamp.com/p/JPL8a7pseBKYzqv3hpTinzsm>

- **Campus/Local Documents & Training (must be logged in)**

<https://3.basecamp.com/3649838/buckets/2511260/vaults/2055035336>





Questions or Discussion?

www.suny.edu

