Welcome to Introduction to Alma. In this class, you'll learn Alma's basic functions and structure, discuss the differences between Aleph and Alma, and begin your vocabulary lessons of Alma terms. When I demonstrate Alma, we'll walk through the main menu and search bar and learn how you can customize your Alma account, including setting Quick Links to frequent tasks.

First, I'd like to ask two questions:
Who here is seeing Alma for the first time?
Who in this room was at Harvard for the HULPR to Aleph transition?

I’m asking this because libraries may switch to a newer-generation ILS every 10 years or so. (Sometimes a little longer.) What we are doing now is the same as when Harvard switched from HULPR to Aleph. It is going to be incredibly different at first, and then we’ll get familiar with it, and then it’ll seem as if we’ve had it forever. The basic work isn’t changing, but the tool is.

Now, a few notes:

- Alma went live on July 3rd and, as expected, we're learning new things about it as staff work with real data in the system. Everyone is continuing to learn Alma, and will have the support they need to do so.
- We are training on the tool of Alma, and while there is usually more than one way to do anything in Alma, we will show you one verified or preferred way to do tasks. Once you’ve learned the best practice, we encourage staff to discuss local procedures and workflows in your units.
- We also encourage everyone to come together in Learning Circles - either cross-functional within units or on the same functions across units - to discuss how the implementation is going and how the new features and workflows in Alma might change work at Harvard.
- Please continue to use the LTS Alma Support form to ask questions and report issues with Alma data, workflows, or roles & permissions. Asking these questions, and working groups providing answers, is an important part of everyone learning more about Alma. You can find the link in the Notifications widget in Alma, along with the link to Alma documentation on the LTS wiki.
- You have a 1-page handout that contains a link to the Alma sandbox, the wiki page for this class, and a few other useful links. (If there are other handouts, describe them.) The script and all materials for this class are available to review on the wiki, and will continue to be updated with any changes in procedures.

Some quick logistics information:

- The nearest bathrooms & water supply are:
  - **Lamont rooms:** Restrooms are gendered by floor. Lamont 310 is on a men’s room floor, Lamont B-30 is on a women’s room floor.
  - **90 Mt Auburn:** Two restrooms are on the opposite side of the building on the basement level, water is in the kitchenette and in a fountain by the restrooms
  - **625 Mass Ave:** Restrooms are at the opposite end of the building on the 3rd floor, by the water fountain
- Please ask questions when they come up; I will also pause between sections for questions and to make sure things are clear.

Let's start by introducing ourselves. (Go around the room and ask everyone to share their name, library/unit, and what their primary roles are there.)

**(Re-) Introducing the LTS wiki**

Coming back to your handout, I want to point out that the place to go first for information about Alma is the LTS wiki – the web addresses are the second and third links on your handout. I’ll say this again at the end, but between now and your next class, take some time to visit the wiki and read the documents there. They answer questions about how Alma works, how Harvard is using Alma, what the suggested or preferred ways to complete work are, and other details.

We are keeping the handouts simple and providing a link to the wiki because the wiki is the best place to stay up to date on information. I strongly recommend that you “Watch” all the wiki pages related to your work – I’ll show you how to do that at the end of this training.

Finally, the script for this class and the handout are both available in the Training Documents section of the wiki.

**Major Differences between Aleph & Alma**

<table>
<thead>
<tr>
<th>Aleph</th>
<th>Alma</th>
</tr>
</thead>
<tbody>
<tr>
<td>Desktop-based Software</td>
<td>Web-based platform</td>
</tr>
<tr>
<td>Keyboard-focused with some point and click</td>
<td>Mouse-focused with keyboard shortcuts</td>
</tr>
<tr>
<td>Made up of separate modules</td>
<td>Unified system</td>
</tr>
<tr>
<td>Location-based knowledge of information (what’s in which module?)</td>
<td>Search-based discovery of information</td>
</tr>
<tr>
<td>Static software environment</td>
<td>Log out / time out after 60 minutes of non-use</td>
</tr>
<tr>
<td>Updated through software versions, with a long time between versions</td>
<td>Updated monthly with full release notes</td>
</tr>
</tbody>
</table>
Aleph/HOLLIS Numbers

<table>
<thead>
<tr>
<th></th>
<th>Alma system number (the MMSID)</th>
</tr>
</thead>
</table>

**Note:** Robust search, internal links between related records, and the ability to save and export sets of records make it less necessary/useful to know the system number than it was in Aleph.

Aleph Numbers: Yes, “Aleph/HOLLIS numbers” will no longer be assigned to new records. The Aleph number was the system number for Aleph – Alma has its own system number for each record. In your functional trainings, as you learn how processes work in Alma, you’ll learn more about the reference numbers used for things like order lines, invoices, and requests.

Later on in this session, we’ll look more closely at the new system number and at search both today and in your Search and Sets class. I will show you how to search for an Aleph number in Alma, and how the MMSID incorporates the Aleph number (plus a prefix and suffix).

**Browser-Based**

One of the first, and biggest, differences between Aleph and Alma is that Alma is entirely online. You do not need to have any software on your computer to use Alma, you just go to a website and log in. People have asked and yes, this means you can access your work in Alma from any computer. This is great for training or meetings where you might be borrowing a laptop or using a computer lab machine.

**Preferred Browsers** (in order of effectiveness): Google Chrome, Mozilla Firefox, Microsoft Edge.

**Unsupported Browsers:** Microsoft Internet Explorer (because it's at end-of-life), Apple Safari (though there are requests to Ex Libris for support for this)

**Use Favorites or Bookmarks** to make getting to the URL easier. See the Alma Basics or Alma on Different Devices pages for more information.

**Keyboard Shortcuts:** This also means that many of the keyboard shortcuts you can use for a browser will work on Alma, if you’re more comfortable keeping your hands on the keyboard. Alma also has a list of specific keyboard shortcuts you can use – the full is available on the LTS wiki at https://wiki.harvard.edu/confluence/display/LibraryStaffDoc/Keyboard+Shortcuts

The ones I’ll point out right away are that you can use Ctrl and the plus or minus signs to increase or decrease the font size on your screen. If you’re following along, practice with that now. You will see that if you increase the font size too much, you might push options off the right side of the screen or make the layout change – that’s okay, and you can get a feeling for what works best for you.

In this way, Alma works well for anyone who needs larger fonts or uses a screen reader. Alma meets ADA compliance standards, and should work with most screen reading software.

**The Back Button:** The best way to move back a page in Alma is to use the on-screen back arrow, not the back button on your browser. I’ll show this off once we log in.

**TRAINING NOTES:**

- For training, we will be using a copy of our Harvard information available in a separate website – a Training Sandbox. Don’t worry about “messing things up” in this sandbox, it’s here for you to practice in, so please go in and try things out.
- In the live/production site, however, please be careful of the quality of the data you enter and conscientious of others’ work.
- Any customization you make in the sandbox will not carry over into production & vice versa. You will have to re-do work like customizing the display of results or adding Quick Links in your production login.

**Logging In**

**Logging in:** To log in to Alma, go to the sandbox or production URL and log in with your HarvardKey credentials.

**Tips for Logging in with HarvardKey:**

- If you haven’t logged in with HarvardKey on your computer recently, you’ll need to go through the 2-factor authentication process.
- On your own computer, click the box next to Remember this device for 30 days. This means you’ll only have to type in your username and password, not have the 2nd factor of authentication.
- If you let your browser remember your username and password for this site, you don't need to type them in every time. Just click on the red Login button and you're all set.
- To claim your HarvardKey, recover your password, or change your personal details, visit the HarvardKey information pages. ([https://key.harvard.edu](https://key.harvard.edu))

**Logging out:** Alma will automatically log you out after 60 minutes of inactivity. If you work at a shared computer, log out at the end of your shift or if you’ll be off-desk for an extended period of time.
User Roles & Permissions

In Aleph, everyone was assigned different user permissions, which affected what records you could work on. Alma also has permissions, based on User Roles. These affect more than just what records you can edit – it also can affect what you can search for and what information in a record you can click on. It will take time to become familiar with what your user roles & permissions will and won’t let you do.

**TRAINING NOTE:** During training, we wanted to make sure that everyone was able to perform the exercises, so all staff have the same roles in the sandbox. On the production site, you will only have the roles and permissions you need to do your work. If you’re not able to do something you need to do your work, tell your manager immediately. You’ll hear this again in a few minutes.

You can see your user roles under your Account information – we’ll look at this in a moment.

The Home Page

This is the Alma home page. Return to this page at any time by clicking the Harvard shield in the upper left corner.

Main Menu Bar

The main Alma menu matches the functional areas of Alma:

- **Acquisitions** – every step of the acquisitions process, from ordering to shelf prep
- **Resources** – resource management for print and electronic resources, including cataloging and inventory management
- **Fulfillment** – includes work to fulfill all kinds of requests and needs: circulation, holds, resource sharing, and course reserves
- **Administration** – mostly important for Manage Sets
- **Analytics** – analysis based on data in Alma; some functions available as view-only, others to create new analyses

**TRAINING NOTE:** Analytics is not active in the sandbox, but is in production

**Quick Links star:** We’ll talk more about quick links in a moment, but click this star to get access to a self-created menu of your most important or frequently-used menu items.

**Search for Menu Links:** You can search for the link to any function you’re trying to do in Alma. Click on the double arrows right next to the star to search by name for a function like Claims or Scan in Item.

**Location:** You can set or change your location as needed, and may need to switch to different locations to complete your work. To see what your location is at a glance, click on the Always show location box.

**Account icon:** Click here to details about your profile – including the list of your user roles -- and some basic usability settings (including font size and layout spread). Also click here to log out.

**Tasks:** The Task List tracks steps in workflows that need attention. Some are unassigned, others are assigned to specific staff. The Task List is used most in Acquisitions (especially order and invoice approval workflows), Fulfillment workflows, and Course Reserves/Reading Lists workflows. This is a new feature, and is still being added to workflows in different units.

**Gear icon:** This is the configuration icon, and unlike most online accounts, this one leads to configuration options for all of Alma. If you click on it, you probably won’t see very many options; only senior staff have permission to change Alma-wide settings.

**Question mark icon:** This gives you the option of different kinds of help with Alma, including the Ex Libris Knowledge Center. Important things to point out:

- **Help for This Page** – this is also context-dependent. Alma knows what page you’re on, and if you click this, you’ll be taken directly to the Ex Libris help section related to what you’re doing. Note that this is Ex Libris help, not Harvard help, so any Harvard-specific questions need to be answered by going to the LTS wiki.
- **Browse Online Help** – this leads to the main Alma help section at Ex Libris’s site. You can then browse or search to find what you’re looking for.
- **What’s New Videos/Alma Release Schedule** – As we said earlier, Alma is updated every month. To see when the updates are applied, check the schedule; you can read the Harvard Highlights of each monthly release on the Alma wiki (this page also has a link to the full Ex Libris release notes).

Widgets

A widget is a small container for information on a web page. In Alma, these widgets can contain information about the Alma system (Notifications), about the library, or display charts and tables of data from the Alma database.

To add a widget to your home page:

1. Click on the blue plus sign on the right side of the screen.
2. Click on the box next to the widget you want to add.
3. Click on the X in the upper right dialogue box or hit the ESC key to close the box.

To remove a widget, click on the downward-facing arrow in the upper right corner of the widget box, then click on Remove.
On-Screen Help

Alma is a website, and like many websites – think Amazon or even Hollis – it’s going to try and help you. If you hover your mouse over a button or an icon, Alma will tell you what that icon means, what that button does, or suggest a keyboard shortcut. For example:

- If you hover over the star, it reminds you that this is the Quick Links menu icon
- If you hover over the double arrow, it tells you that it’s the “find a menu” link AND gives you the keyboard shortcut (Alt + Ctrl + F)
- If you hover over the blue plus sign, it says that this button will let you Manage Widgets

The first time you go to a page, take a moment to just move your cursor around the screen over different links and buttons and icons. Let Alma tell you what they’re for, and then double-check your training for how to use them.

Recently-Used Information

Because you log in to Alma as an individual, it will remember what you recently did or what you recently looked for. This makes it faster to go to the same place or conduct the same search. Look for the “clock running backwards” icon for recently-used information.

On the Home Page: You’ll see a few Recent Pages you were on, so a single click will let you get back there.

In a search: If you click in the search field or start typing, Alma will suggest recent things you’ve searched for. This is useful if you need to find something again a few days later.

Context-dependent menus

Throughout your training in Alma, you’ll see that many screens will change depending on options you select. These are called “context-dependent options” – the options change depending on the context you’ve chosen. For instance, when ordering an item, the first question asks whether the item is physical or electronic, and the next fields change depending on which one you choose.

On the home page, the options underneath the main menu headings will change depending on:

- Your account permissions
- Your location

For instance, if your location is not at a circulation desk, you will not see any circulation functions. If you don’t have permission to perform a function, you won’t see it listed in the menu choices.

Tell Someone!

The idea of these context-based menus is to ‘tidy up’ your workspace. Again, if you can’t see a function you need to do your job, let your manager know immediately. We want you to be able to do your work.

Quick Links

To identify menu items you need frequently - or menu choices you need rarely (and can never seem to find) - hover over the name of a menu item and a gray star will appear. Click on that star to add that menu item to your Quick Links list.

To see your Quick Links list, click on the star to the left of Acquisitions in the persistent menu bar. The first few items in your Quick Links list will display in the bar; it’s limited by the length of the titles of the items, so you may see more or fewer.

You can star more than that number of items, but only the first few you star will display on the bar. Before you star, identify what your top 5-7 items are and star them first, then star any additional items you want to highlight.

Click the Return to Main Menu icon to return to the main menu.

Persistent Search

The Search and Sets class will go through these searches much more thoroughly, but I’ll show you the basics of how they work now. After today’s class, I recommend you at least log in to Alma once and try a basic search, just to get a feel for how it works.

Below the main menu is the persistent search bar. These two items appear on every page in Alma, which means you don't need to return to the home page to start a different task. Just choose a new item from the menu or search for something (like an invoice number) to begin working on something new.

The search choices are also context-dependent. To search, choose a Search Type from the first column; once you choose a search type, the Search Fields will be limited to only the fields in that type of record. If you choose the search type “Invoices,” you will see “Invoice Number” but won’t see “ISBN” as a search field option.
Advanced Search: The simple search is incredibly robust, but if you require a very specific search for a group of records, use the Advanced Search.

1. Choose the Search Type from the blue box first
2. Click on Advanced Search
3. Choose the first Search Field and a comparison term for it, then input the search criteria (remember, these will be context-dependent based on which Search Type you chose)
4. Click on the plus symbol to add another Search Field, and repeat.
5. Repeat until you have all of the search terms you want. It may be good to start with the most important terms and get a list of results, then add more to refine further.
6. Click Search
7. Use the facets on the left to limit the results, or sort by primary and secondary sort within the list of results
8. If you want to be able to repeat this search, click on Save Query on the right
9. To export the results as a .CSV file, click on the Export icon (a piece of paper with an arrow facing to the right)
10. Click on Clear form to start over

To customize what displays in your list of search results, and in what order, click on the Gear icon.

Again, you’ll learn much more about searching in Search and Sets, but don’t be afraid to play with it once you’ve logged in.

The Back Button: Remember that I mentioned that the best way to move back a page in Alma is to use the on-screen back arrow, not the back button on your browser? That’s because if you use the back button, Alma might refresh your search results page or the fields you were working in. If you use the back arrow or a back button on the page, like this, Alma knows where you’re trying to get back to and will take you there.

The Alma System Number

In Aleph, the system number (what we called the “Aleph number” or “HOLLIS number”) was a central organizational element.

In Alma, there is also a system number called the MMSID, but it isn’t used nearly as often.

Why?

In Aleph, because you had to move from module to module, you needed to carry the Aleph number with you to link things together, either by memory or by copying and pasting. You had to know that the order number was the Aleph number plus -1 (or whatever number order it was).

In Alma, this job is managed by the system itself - there are links within each record to many related records. For instance, a bib record may include links to related holdings, item, request, order, and course list records. Clicking on the number next to Orders will bring you to a list of all orders for that title; from each order record, you can get to the related invoices, and clicking on an invoice number can bring you to fund details, which can get you to all the orders placed against that fund, and so on.

Parts of an MMSID

There are several parts to an MMSID, each describing part of that record.

MMS ID: 99 009742249020 3941

Each MMSID starts with a two-digit code that indicates the record type.

- 99: Bibliographic records
- 22: Holding records
- 23: Items
- For more, see the Alma System Numbers page

Each MMSID ends with the four-digit institution code: Harvard is 3941. This code identifies Harvard records in Ex Libris’s databases.

In the middle is an autogenerated section of the MMSID. The record type code plus the autogenerated section in the middle make up the unique parts in the MMSID, because the same autogenerated number can be repeated for different record types and those records may not be related.

For example, if I look up the bib record for an edition of *Guns, Germs, and Steel* by Jared Diamond, I find the following:

Bib record MMSID: 990097422490203941
Holdings record MMSID for Cabot: 222082828690003941
Items record MMSID on that holdings: 232082828670003941

MMSIDs of Migrated Records

For all records that migrate from Alma, the MMSID will include the Aleph number plus the digits 020. If we look at our example again, we see that it's actually a migrated record from Aleph, and the Aleph ID is embedded in the center section:

Aleph ID: 009742249
MMS ID: 99 009742249 020 3941

MMSIDs for New Records

For all records created new in Alma, that central section will be autogenerated by the system. It will NOT be an "Aleph number," and should not be treated as such.

Inventory Model

Another important thing to understand about Alma is how materials records are structured in this system. It is different than in Aleph in several ways.

Most importantly, in Aleph, it was possible to have items linked directly to a bibliographic record. That is not true in Alma – you must have a holdings record as well. In most cases, this will be created automatically as part of the migration or ordering process, but if you are processing a gift item or attaching an item to an existing record, you may need to create a holdings record. You’ll learn much more about this in the Items & Holdings class, or in your Acquisitions or Cataloging training.

The inventory model in Alma is based on three levels:

- Bibliographic level – known as Titles in Alma
- Some middle level
- Item level

At the bibliographic/Titles level, you have two types:

- **Physical Titles** = bib records that have holdings attached, indicating physical inventory
- **Electronic Titles** = bib records for licensed material that gets activated/de-activated

**Items** = item/holding records

- **Physical Items** = item records for any physical inventory, regardless of format
- **Electronic Titles** = item records for licensed material that gets activated/de-activated

The middle and item levels change names depending on format:

- **Print**: Bib/Title record >> Holdings record >> Item record
- **Electronic**: Bib/Title >> Collection record (electronic service information) >> Portfolio (individual electronic item)

**Note**: You will also see options for Digital materials. Harvard hasn’t subscribed to use this part of Alma (we are continuing to use existing digital repositories) but because Alma is a hosted system, we can’t remove these from the search options.

When you search, it’s important to know what kind of records you’re searching for:

- If you want to find **bibliographic records**, search for **Titles**, Physical or Electronic. The **All Titles** search type will find all bib records, regardless of resource type or whether they have holdings/electronic inventory.
- If you want to find **item records**, search for **Items**, Physical or Electronic

You can’t really search for Holdings records by themselves, except to edit them, but you can search for **Electronic Collections** (e.g., everything we have from EBSCO).

Again, this is a big change from Aleph, so play with the search to see the differences in what kinds of records you get and what information is in them. You’ll see examples of all of these searches in Search & Sets – this is why it’s its own class!
AFTER TODAY, DO THIS FIRST!

After you leave this class, I strongly encourage you to log in to Alma to just look through the system. Click on different menu choices, see what the pages look like. Try a simple search and see what you get.

The first time you log in to Alma, do these two things right away. They’ll improve your experience of using Alma. These are on your handout.

1. Click Always Show Location. The location you set will change the options you see and the actions you can take in Alma. Always showing that location lets you see at a glance if you’re set to the right location for the work you’re doing.
   1. Click on the location icon (a map pointer) in the blue menu bar.
   2. Click on the box next to Always Show Location so that a check mark appears in the box.
   3. You’re all set!

2. Add two widgets to your home page. You might choose to add other widgets later, but these two will be important to working in Alma.
   1. Click on the blue plus sign on the right side of the screen.
   2. Click on the boxes next to the first two widgets you see: Tasks and Notifications
   3. Click on the X in the upper right corner of this dialogue box, or hit the ESC key to close the box.
   4. You’re all set.

Next Steps & Closing

Between now and your Search and Sets class, we’d like you to do a few things:

- Log in to Alma and just navigate around the site, to get used to it
- Set Always Show Location and the two widgets I just described
- Try clicking on a few menu items to see what those pages look like
- Try a simple search for the types of records you’d typically be working with
- Visit the Alma section on the LTS wiki and become familiar with the documentation there. The web address is on your handout.
- “Watch” any wiki pages that are important to your work

Watch the wiki: To Watch a wiki page, go to the page and check the upper right corner to make sure that you’re logged in. If not, log in by clicking Log In and then using your Harvard Key credentials. You’ll come back to the page, and you’ll see the word “Watch” next to an eye icon. Click on Watch and you’ll receive email updates whenever the page is changed, with a preview of what was changed. This way, you’ll automatically know if anything is updated there.

In Search and Sets, you’ll learn more about searching, practice both simple and advanced searches in different functional areas, and learn how to create sets – or lists of records – to use for different work purposes.

After today, you’ll receive a link to an online evaluation form with 12 questions. It should only take a few minutes, and will help us improve these sessions and also to create long-term trainings for the future.

Any more questions?