Logging in and Navigating in Alma

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About Alma

Alma is a unified resource management system (or library services platform) that replaced the former ILS (integrated library system) in July, 2018. Alma is a web-based, hosted platform that brings together cataloging, circulation, acquisitions, selection, resource management (including eResources), course reserves processing, and resource sharing functions into a single system. It also provides tools for reference and liaison librarians and staff in preservation, collections care, and digitization departments.

Alma is the staff interface to the database of Harvard Library’s materials and patron records. Alma and HOLLIS (the public search and discovery interface) pull from the same records and display the same information, but Alma provides information useful for staff while HOLLIS provides information useful for patrons.

Alma was implemented on July 3, 2018, replacing Aleph/Verde/SFX and taking over the functions of Cognos (reporting software). Connexion (cataloging), Aeon (special collections), and DRS (digital repository) remain in use at Harvard.

Alma at a glance:

- Web-based, hosted platform
- Mouse-focused with keyboard shortcuts
- Search-based discovery of information
- Unified system, including eResources and Analytics
- Updated monthly with full release notes
- Log out / time out after 60 minutes of non-use

Logging In to Alma

Logging In

To log in to Alma, go to the appropriate URL and log in with either your HarvardKey credentials or shared circulation desk credentials. There are three URLs for Alma:

- Production Alma for HarvardKey logins: https://hvd.alma.exlibrisgroup.com/CAS
- Production Alma for shared circulation desk logins: https://hvd.alma.exlibrisgroup.com/mng/login
- Sandbox/training version of Alma: https://hvd-psb.alma.exlibrisgroup.com/CAS

Production means the “live” or active version of Alma, with current records, real-time circulation data, and access to Alma Analytics.

Sandbox is the training or testing/QA version of Alma; records are refreshed twice a year, the circulation data is only valid within the sandbox (=not real), and it does not have access to Analytics.

Logging out

Alma will automatically log you out after 60 minutes of inactivity. If you work with your own login 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. If you are on a shared-login circulation desk computer, do not log out.
HarvardKey

Harvard Key Login Tips

The first time you log in to Alma from your usual work computer, when you get to the Harvard Key authentication page, click on the box next to Remember this Device for 30 Days. This will allow you to skip the 2-factor authentication step and just log back in with your email and password.

If you log in to any other system that uses the Harvard Key login, your browser should remember those credentials for up to 30 minutes or so and automatically log you in, which makes switching from one Harvard Key system (the LTS wiki, Alma, PeopleSoft, Harvard Images) to another easier.

If you set your browser to automatically clear cookies or the cache at close, it will not remember your device each day and you will have to use the 2-factor authentication each time. If you're concerned about cookies, you might want to designate one browser as your "Harvard Key systems" browser and use it only for those services.

For more about Harvard Key, visit the HUIT HarvardKey information pages.

Bookmarking Alma (HarvardKey URL)

If your browser is set to show the Bookmarks Toolbar (which displays a row of bookmarks right below the address bar), highlight this link https://hvd.alma.exlibrisgroup.com/CAS and left-click/drag it directly to the toolbar.

You can also create a new bookmark manually:

1. Copy the text of this link: https://hvd.alma.exlibrisgroup.com/CAS
2. Open the browser's bookmark manager (Ctrl + Shift + B in Firefox ; Ctrl + Shift + O in Chrome)
3. Find the option to Add/Create a new bookmark.
4. Paste the link text as shown above into the Location field.

The Home Page

Once you log in, you'll be on 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
- Resources
- Fulfillment
- Administration
- Analytics

Icons in the Upper Right Corner

Location: This indicates what location you are "set" at. It might be where you physically are, or it might be a library you're performing work for (for Shared Services staff). You can change your location setting at any time to perform different actions - see About Your Location below for more details. To change this from an icon to the actual location name, click on the icon and then click on the box next to Always show location.

Account icon: Click here to see details about your profile and some basic usability settings (including font size and layout spread). Also click here to log out.

Tasks: The Task List helps keep track of things that need your attention, such as orders or invoices to be reviewed, course reserves to be managed, requests to be handled, and eResources to be activated.

Gear icon: This is the Alma configuration icon; only staff who are able to change configuration settings will see anything if they click on this icon.

Question mark icon: This provides links to different kinds of help with Alma, all from Ex Libris:

- Browse Online Help at the Ex Libris Knowledge Center
- Get Help for this Page, which takes you directly to the relevant page in the Knowledge Center. This is an incredibly useful feature in Alma.
- Additional links or status updates about that instance of Alma
About Your Location

To see what your location is at a glance, click on the **Always show location** box.

You can set your location at any time, and may need to change it periodically to complete your work. Your location can affect what options you see and actions you take in Alma, especially for circulation, receiving, and work order functions. If you aren't able to complete a task, **check where your location is set first** and choose the correct location for the work you're doing.

As a general rule, if you are in Shared Services and do most/all of your work for or at one library, it's safe to set your location to that library and only change it when necessary.

For staff who often work at/with multiple libraries:

- Tasks that are *not* limited by location:
  - Searching
  - Viewing most records
  - Creating items (outside of the receiving process)
  - Cataloging/Working in the Metadata Editor (bibs and holdings)
  - Creating Orders (what matters is who you choose as the PO Owner, not your location)
  - Reviewing orders or invoices
  - Viewing requests on materials

- Tasks that *are* limited or governed by location:
  - Circulation, pick list, and hold shelf functions
  - Receiving materials
  - Initiating and working with Work Orders

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 **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 dialog box.

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

Context-Dependent Menus

The options underneath the main menu headings will change depending on:

- Your account permissions
- Your location

For instance, if your location is not set to a circulation desk, you will not see any circulation functions. If you do not have certain permission-defining roles (specific to Alma), you may not be able to see some options; if someone's primary responsibility is processing invoices, you will probably not see circulation functions.

Tell Someone!
The idea is to ‘tidy up’ your workspace; **if you can’t see a function you need to do your job, let your manager know.**

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 the outline of a 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.

Persisting Search

Below the persistent 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.

Again, the search choices are 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.

Most Search Types and Search Fields are self-explanatory, and Ex Libris provides a list of more-complex search fields at the Knowledge Center.

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 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.

Read more on Search and Sets (the results of searches).

DO THIS FIRST!

The first time you log in to Alma, do these two things right away. They'll improve your experience of using Alma.

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.

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**Resource Pages**

- Alma Glossary with Aleph Crosswalks
- Aleph to Alma Field Mapping Guides
- Ex Libris' documentation on the User Interface
- Alma Release Notes at Ex Libris