Main Menu Bar - Alma Overview Module

This is the second section of the introduction module to the Alma Overviews course. The video is at the top of the page, followed by the script.

In this video, you'll review:

- The Home Page
- The Main Menu
- Quick Links
- Icons on the Menu Bar
- Help in Alma

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The Home Page

When you log in, you’ll arrive at the Alma home page. You can return to this page at any time by clicking the Harvard shield in the upper left corner.

There are two primary navigation tools in Alma: the Main Menu Bar in color along the top and beneath it, the Persistent Search Bar. These two tools 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 function from the menu or search for something (like an invoice number) to begin working on something new.

The Main Menu

Let’s start with the Main Menu Bar. The main Alma menu matches the functional areas of Alma:

- **Acquisitions** covers every step of the acquisitions process, from ordering to post-receiving work
- **Resources** stands for resource management. This is where you manage all print and electronic resources, including cataloging and inventory functions
- **Fulfillment** includes work to fulfill any kind of requests or needs: circulation, holds, resource sharing, and course reserves
- **The Admin menu** is most important for **Manage Sets; we’ll come back to sets in the Sets module of this course**.
- Finally, **Analytics**. The **Analytics** section is a built-in tool for Alma data. Many reports are available as view-only, but you need additional Design Analytics permissions to create analyses.

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

Quick Links

To the left of the main menu are two icons for links in the menu bar. First, Alma allows you to create a personalized menu of functions that are important to your work. These are the Quick Links. To add a function to your Quick Links, find the function that you want to add and hover over it in the main menu. A gray star will appear. Click on that gray star to turn it blue and you’ve added that functional item to your Quick Links menu.

To see your Quick Links menu, click on the star to the left of Acquisitions in the main menu. The first few items on your Quick Links list will display in the bar; it’s limited by the length of the titles of the functions, so you may see more or fewer options than this. Click on the ellipsis (“more”) icon to see the rest of your Quick Link options.

The most efficient way to put together your Quick Links list is to identify what your top 5 to 7 functions are and star these first, so they appear in the bar. Then, star any additional functions you want to highlight, so they appear in the More list.

You can return to the main menu by clicking the Back to Menu icon where the star used to be.

Next to the Quick Links star is a double arrow icon for the **Find a Menu Link** feature. Using this, you can search for the link to any function in Alma. Just click on the double arrow icon and start typing. When you do, Alma will find all functions with the word you type in its name. It will also remind you which menu heading they’re under and allow you to add them to your Quick Links right from the results. You can click on the double arrow again to close this feature.

Icons on the Menu Bar

Now, let’s look at the icons on the right side of the menu bar.

First up is a **map icon for changing your location**. The first time you log in to Alma, the system will ask you to set your current location. Choose the location that you are most often (or always) at – you can change your location at any time, so just set one of them to start with. You can always see the full list of locations available to you here from the drop-down menu.

It’s a good idea to click on **Always show current location** box. That will replace the map icon with the actual text of the location you’re set to. This way, you can know at a glance what location you’re set for and whether it’s the right location for your work. To see all of your locations, click on the drop-down. If you don’t see the full list of locations that you should have access to in the drop-down, please tell your manager immediately so they can update your permissions. You will learn much more about the importance of your location in functional training, especially in Acquisitions and Fulfillment roles.

Next to the location is the **Account icon**: Click here for some basic usability settings for display and font size and the layout, and to sign out of Alma.

The next icon is the Tasks icon. Alma is designed to help libraries manage workflows, and one tool for that is the Task List. This is a new feature, and is still being added to workflows in Acquisitions and Fulfillment areas. Again, you’ll learn more about this in later training.
Next is the Gear icon. This is the configuration icon, but — unlike most online accounts — this one will lead to configuration options for all of Alma, not just your account. If you click on it, you probably won’t see very many options; only senior staff have permission to change Alma-wide settings. However, if you get here, just click Back to Alma and you’re all set.

Help in Alma

Finally is the Question mark or Help icon: This gives you the option of different kinds of help with Alma, including the Ex Libris Knowledge Center. Note that any of the help here is written by Ex Libris help, so if you need to answer Harvard-specific questions, you will need to look at the Harvard-created Alma documentation.

A few important things to point out:

• Over here is a Help for This Page feature, and this is a fantastic feature. If you are on any page in Alma, such as the Scan In Items page, Alma knows what page you’re on. If you click Help for This Page, you’ll be taken immediately to the Ex Libris help section related to what you’re doing. These help documents will remind you of basic steps and contain detailed reference documents about field information, indexing rules, etc. You can close this window at any time — whether you opened a tab or a window — by clicking the X.

• The Browse Online Help option leads you to the main help section in Ex Libris’ Knowledge Center.

• Also under the help menu is the What’s New Videos and Alma Release Schedule. Alma is updated in monthly releases by Ex Libris, with new features and fixes each month. The release schedule will tell you when these occur (both in the sandbox and in production) and the What’s New Videos will highlight what’s new. You can read the Harvard Highlights for each monthly release on the Alma wiki, and this page also has a link to the full Ex Libris release notes for the entire year.