Alma Administration – General
Introduction to Alma Administration

Welcome to our introduction to Alma Administration!

In this session, we'll learn about administrator roles in Alma, get acquainted with Alma Configuration, and look at some online resources to help you along your journey as an Alma administrator.

I'm currently logged in to Alma as an administrator. Let's look at my User Details and scroll down to my User Roles. An administrator in Alma is a user with one or more of the available administration roles. Chief examples are the General System Administrator, and the Acquisitions, Analytics, Catalog, Fulfillment, and Repository Administrators. Administrator roles allow users to configure Alma. They normally do not enable users to perform day-to-day workflows.

If a user's admin role is marked as Read only, that means that particular user can view, but not edit, the configurations for the relevant subject area. You can configure this under row actions > Edit. Since Read only is selected, this user can only view Fulfillment configurations. If we deselect the checkbox and Save Role, our user can now also edit Fulfillment configurations.

From a data security perspective, two Administrator roles should be considered super-users: The General System Administrator, and the User Administrator. These roles allow users to assign themselves any other roles they like, and consequently they can configure all areas of Alma. Please exercise great caution when granting these roles to an individual. More about user roles can be found in the documentation.

The specific permissions granted by each role are called Role Privileges. You can find a list of all roles and their respective privileges here. As you can see, each role is comprised of a set of privileges.

Let's take a quick tour of Alma Configuration. As an Alma administrator, you can access Configuration via the gear icon on the bottom of the Alma menu. We are now in Configuration. The left menu offers configuration options for each of Alma's functional areas, depending on your role. For example, a Fulfillment Administrator can configure the Fulfillment Units. It is important to note whether you are configuring on the institution-level or the library-level. We are currently on the institution-level, so we can view and edit the fulfillment units for the entire institution. If we select to configure a specific library, like the Art Library, we can now view and edit that library's fulfillment units.

When configuring on the institution-level, you'll notice that for each functional area in the Alma menu, under the General section, there is an option called Other Settings. Here you can find your "Customer Parameters" which are general Alma parameters that govern many of Alma's features. This table shows the Customer Parameters for Resource management. You can learn about what each parameter does in the documentation. You can also hover over a parameter's free text description to see what it does. To edit a parameter, click row actions > Customize, and enter a new value for that parameter. When done, click Save.

Now let's look at some useful online resources to help you administer Alma.

The Ex Libris System Status page allows you to see if your Alma environment is up and running, or if there is any scheduled maintenance. You can register to receive a personalized experience focusing on your institution's servers and email updates on expected downtimes.

The Ex Libris Developer Network provides you with technical information relating to Alma's APIs, standards for integration with other systems, and the Alma Tech Blog.

In our Education & Knowledge Webinars page, you can register to live webinars presented by Ex Libris experts on many Alma topics.

The Ex Libris YouTube channel is home to training videos, product promo videos, and webinar recordings. Subscribe to the channel for updates.

Finally, the Ex Libris Knowledge Center can be found at knowledge.exlibrisgroup.com. In the Alma section, you can find many essential product materials. Support tickets can be opened via Submit a Case, and resolved support issues can be featured under Knowledge Articles. Documentation features the complete Alma Online Help. And Training showcases Alma training, including this Alma Administration Certification. At the end of this course, there will be a certification exam on the material covered. Following successful completion of the exam, you will become a Certified Alma Administrator!

We wish you success on your Alma journey!