The Alma User Interface

The following sections present elements that appear or remain consistent in the UI for all users throughout the Alma UI.

Note
An administrator can configure the look and feel of Alma, including colors, logo, and default language. See User Interface Settings.

The Alma Home Page

The home page is the initial page that appears when you log in to Alma. You return to the Alma home page when you select the logo in the persistent menu or when you cancel certain actions in Alma.

Alma Home Page Elements

The elements on the Alma home page and items available in the menus depend on your user role and the information available at your institution. However, the home page always presents:

- **Persistent Menu** – For information, see The Persistent Menu.
- **Navigation bar** - For more information, see The Navigation Bar.
- Your user name and current date.
- **Recent Pages Widget** – Displays the pages you have most recently visited. Select to go directly to one of the pages.
- **Widgets / Manage Widgets Button** - Widgets are a small pane on information or actions that are relevant to your user role and Alma's current status. Some widgets contain links that you can select to view more information. See Managing Widgets.
- **Maintenance Message** (if there is one to display) – A message about upcoming maintenance may appear under the persistent menu. Select X to dismiss the message.
Managing Widgets

Widgets are a small pane on information or actions that are relevant to your user role and Alma's current status. Example widgets include a task list, a library calendar, the status of scheduled jobs, and outstanding student loans. You can display or (with the exception of the Recent Pages widget) remove widgets from the Alma home page.

An administrator can configure the availability and contents of the widgets. For more information, see Configuring Widgets.

To display or hide a widget on the Alma home page:

1. Select the Manage Widgets button on the Alma home page (see the figure Alma Home Page Elements). The Manage Widgets overlay appears. For example:

   ![](image)

   Add Widget

2. Select the empty check box to the left of the widget that you want to display. Select the blue selected check box to the left of the widget that you want to hide.

3. Select X when you are done.

You can also hide a widget by selecting Remove in the drop-down menu at the top right corner of the widget.

![Tasks Widget - Remove](image)

List of Widgets

The following widgets are available in Alma, depending on your user roles. Items in plain font are categories of widgets, rather than the actual name of a pre-defined widget.
<table>
<thead>
<tr>
<th>Widget</th>
<th>Screenshot</th>
<th>Roles</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td>Keep Up with Alma</td>
<td><img src="image1" alt="Keep Up with Alma" /></td>
<td>All</td>
<td>Highlights new Alma features and helps you keep up with Alma’s many new developments, drawing your attention to important aspects of current functionality. Note that you can move the widget to a different part of your dashboard or remove it from your dashboard entirely at any time.</td>
</tr>
<tr>
<td>Analytics</td>
<td><img src="image2" alt="Analytics" /></td>
<td>As defined by the widget</td>
<td>There may be multiple Analytics object widgets with various names, descriptions, and information. You must have at least one of the roles defined for the widget to be able to view it. For more information on Analytics widgets, see Running Analytics Reports and Displaying Them in Alma.</td>
</tr>
<tr>
<td>Tasks</td>
<td><img src="image3" alt="Tasks" /></td>
<td>All</td>
<td>Displays tasks in the task list (see Tasks in the Task List), including a count of how many tasks. Tasks are grouped by expandable headers. Select a row to open the Alma page that enables you to deal with the task. Note For the Electronic Resources tasks, the counter displays the sum of the totals from each listed category (i.e., Unassigned and Past Due-Date-Unassigned). Since a single task may fall into multiple categories, the Electronic Resources tasks counter may display a higher number than there are tasks.</td>
</tr>
<tr>
<td>Notifications</td>
<td><img src="image4" alt="Notifications" /></td>
<td>All</td>
<td>Notifications to all users from your administrators. For information on configuring these notifications, see Configuring the Home Page Notification Widget.</td>
</tr>
<tr>
<td>Widget</td>
<td>Screenshot</td>
<td>Roles</td>
<td>Description</td>
</tr>
<tr>
<td>-------------------------</td>
<td>------------</td>
<td>-------</td>
<td>---------------------------------------------------------------------------------------------------------------------------------------------</td>
</tr>
<tr>
<td>Organizational Calendar</td>
<td><img src="image1.png" alt="Organizational Calendar" /></td>
<td>All</td>
<td>Information about institution and library hours and special events. A few days are shown in the widget; select View Full Calendar to open a pane with the full calendar. For information on configuring hours and events, see <a href="#">Managing Institution/Library Open Hours</a>.</td>
</tr>
<tr>
<td>Scheduled Job Status</td>
<td><img src="image2.png" alt="Scheduled Job Status" /></td>
<td>All</td>
<td>The status of scheduled jobs that ran in your institution, organized by type over the last five days. If there are any failed jobs, a red <code>!</code> appears for that type on that date. Select the More Info link to view the Monitor Jobs page with those jobs pre-filtered to appear. See <a href="#">Viewing Completed Jobs</a>. For more information about this widget, see <a href="#">Viewing Scheduled Job Summary Status</a>.</td>
</tr>
<tr>
<td>Discovery Search</td>
<td><img src="image3.png" alt="Discovery Search" /></td>
<td>All</td>
<td>For Primo VE environments only, this widget allows staff users to search for items using Primo VE’s search interface, which uses the default view defined on the View Configuration page. To configure this widget, see <a href="#">Configuring the Discovery Search Widget</a>.</td>
</tr>
<tr>
<td>Primo Dashboard</td>
<td><img src="image4.png" alt="Primo Dashboard" /></td>
<td>All</td>
<td>For Alma-Primo environments only, this widget displays the status of the last publishing job to Primo. Select Publishing Jobs List to view the Monitor Jobs page with that job pre-filtered to appear. See <a href="#">Viewing Completed Jobs</a>. To configure this widget, see <a href="#">Adding Primo Search Box to the Alma Home Page</a>.</td>
</tr>
<tr>
<td>Consortia Member Links</td>
<td><img src="image5.png" alt="Consortia Member Links" /></td>
<td>All</td>
<td>This widget is available for all institutions, but it only has meaning for institutions that are members of a collaborative network implementing a Network Zone (see <a href="#">Managing Multiple Institutions Using a Network Zone</a>). Select a member institution to open a new tab, enabling you to log in to that institution.</td>
</tr>
</tbody>
</table>

Ex Libris, a ProQuest Company
<table>
<thead>
<tr>
<th>Widget</th>
<th>Screenshot</th>
<th>Roles</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td>Top Trending Books</td>
<td><img src="image1.png" alt="Screenshot" /></td>
<td>All</td>
<td>This widget is available for all institutions that enable the option to contribute their library's inventory information using the <a href="#">Selection and Collection Development</a> tool, which is available on the Data Sharing Profile Configuration page. The widget presents a list of the top 10 physical and electronic books that have been added to library's collections within Alma various institutions (on average) as an indication of trends around the libraries. The widget can be fine-tuned in order to present specific classifications taken from the <a href="#">Library of Congress</a>. In case one of the trending titles is part of your institution's collection, the widget provides an indication and directs you to it.</td>
</tr>
<tr>
<td>Administrator-created</td>
<td><img src="image2.png" alt="Screenshot" /></td>
<td>As defined by the widget</td>
<td>Administrators can create widgets linked to information on any website. For more information, see <a href="#">Configuring Widgets</a>.</td>
</tr>
</tbody>
</table>

---

### The Navigation Bar

The main menu used to navigate in Alma. Throughout this document, any reference to this menu uses a path of menu and sub-menu elements as follows: **main section > sub-section > specific option**, for example **Fulfillment > Checkout/Checkin > Manage Patron Services**. If the resulting page is also a menu of options, these options may appear in the documentation as additional elements to the path.

The Navigation bar can be collapsed to provide more room on the page while still remaining visible. It can be expanded again at any moment.
<table>
<thead>
<tr>
<th>Expanded State</th>
<th>Collapsed State</th>
<th>How to</th>
</tr>
</thead>
<tbody>
<tr>
<td>Alma QA</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Market</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Acquisitions</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Resources</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Research</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Discovery</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Fulfillment</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Admin</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Analytics</td>
<td></td>
<td></td>
</tr>
<tr>
<td></td>
<td></td>
<td></td>
</tr>
</tbody>
</table>

To collapse the Main Menu Navigation panel:

1. Click on the Main Menu Navigation panel (step 4 above) to open the Quick Links panel.
2. Select the **Collapse left menu** option.
3. To return to the expanded view, select **Expand left menu**.

From the Navigation Bar you can easily [search for specific menu option](#) and [set the menu options](#) that you use frequently as Quick Links, so that the Alma interface is personalized to your workflow and you don't have to go through the sub-menus every time.
The options in the Alma main menu depend on several factors, in particular the library/location to which you are logged in (see the table below) and your user role (see Managing User Roles). For the roles that are required to see each option, see User Roles – Descriptions and Accessible Components.

Select an option to navigate to the relevant page and close the menu. The main areas are described in the following areas of the documentation:

- **Acquisitions** - Purchasing physical and electronic materials, as well as managing invoices, vendors, and licenses.
- **Resources** - Cataloging and managing inventory, as well as importing and publishing inventory information.
- **Fulfillment** - Managing patron services, as well as courses and reading lists, resource sharing with other libraries, and other patron requests.
- **Admin** - Administration activities, including managing users and jobs. Also see the Configuration Menu in Configuring Alma.
- **Analytics** - Creating, running, and viewing reports about Alma usage. Some pre-packaged reports are available from this menu.

To find a specific option:
1. Select the search link on the Navigation Menu or type Alt-Ctrl-F. Alternately, at the bottom of any menu area, select the search link.

![Search panel](image)

2. Enter your search term. Matching options in the Navigation Bar, as well as in the Configuration Menu, appear. Select the relevant option.

![Matching search options](image)

To create Quick Links:

There are two methods to create Quick Links that you can use, depending on where in the Alma menu you are:
### From the Navigation Panel

1. Select

   ![Star Icon](image.png) on the Navigation panel. The Quick Links panel opens.

2. In the top search bar, start typing the name of the option you want to set as a Quick Link. All relevant options appear in the list below.

3. Hover your mouse pointer over the desired option, then click on the gray star to the left of the option; when the star turns blue, it is set as a Quick Link.

4. In the bottom section of the panel, select **Pin Quick Links Menu** to display the menu, then select X to close the panel.

---

### From the sub-menu

1. Select the module of Alma were the option that you want to set as a Quick Link is located.

2. Hover your mouse pointer over the desired option, then click on the gray star to the left of the option; when the star turns blue, it is set as a Quick Link.

3. Select

   ![Star Icon](image.png) on the Navigation panel. In the bottom section of the panel, select **Pin Quick Links Menu** to display the menu, then Select X to close the panel.

---

Once created, you can do the following with the Quick Links:

- To view your Quick Links, click

   ![Star Icon](image.png)

   to open the Quick Links panel, and select your link.

- Use the hotkey automatically designated to each Link to open the tools quicker.

- Select **Pin Quick Links menu** to pin all the Quick Links to you page, as additional menu below the Persistent search box, always available on all pages. To remove this menu, click **Unpin Quick Links menu**.

---

### The Persistent Menu

Every page in Alma has the same header, which is called the persistent menu.
Persistent Menu

The persistent menu contains the following elements:

1. **Logo** – The logo of your consortia or institution. Select the logo on any page to return to the Alma home page.
2. **Persistent Search Box** – For more information, see [Searching in Alma](#).
3. **Main Menu Icons** – Icons include (from left to right):

<table>
<thead>
<tr>
<th>Icon</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td><img src="image" alt="Library/desk selector" /></td>
<td><strong>Library/desk selector</strong> – Alma presents you with the features and options that are relevant to your user role and your logged in desk or department. You can switch locations using this menu: select the new location in the drop-down menu.</td>
</tr>
<tr>
<td><img src="image" alt="Institution selector" /></td>
<td>* (not shown)</td>
</tr>
<tr>
<td><img src="image" alt="RFID connection icon" /></td>
<td>* (not shown)</td>
</tr>
</tbody>
</table>
| ![User menu](image) | **User menu** – Your user name and photo (when available) appears as a link. Select the link to open the user menu. The options in this menu are as follows:  
  - In some institutions, the first item in the menu is a language selector that you can use to change the language used in the UI. To change your language, select a new language from the drop-down list. The user interface changes to the selected language. Currencies and numbers in the UI and exported Excel files change to match the standard defined by the language (with commas, periods, and spaces in the appropriate locations). See [Configuring Institution Languages](#). |

**Note**

If your institution is working with a Network Zone and you are permitted to switch between member institutions (you have a user account in multiple institutions), you can also switch between institutions. For more information, see [Switching Between Institutions](#).

The current location does not appear in the persistent menu by default. To display the current location in the persistent menu, select **Always show current location** in the library/desk selector menu.

### Library/Desk Selector Menu

![Library/Desk Selector Menu](image)

Current Location in Persistent Menu

**Enable Quick Printing** – Select this option to set that all printouts that are created as part of a workflow via the user interface and going to a specific printer should print automatically, overriding the Print dialog. When using quick printing, the printing window immediately displays when the letter is generated.

In some institutions, the first item in the menu is a language selector that you can use to change the language used in the UI. To change your language, select a new language from the drop-down list. The user interface changes to the selected language. Currencies and numbers in the UI and exported Excel files change to match the standard defined by the language (with commas, periods, and spaces in the appropriate locations). See [Configuring Institution Languages](#).
<table>
<thead>
<tr>
<th>Icon</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td><img src="image1.png" alt="Icon" /></td>
<td>Change Password – Change your password. This option only appears for internally managed users (see Account Type). To change your password, enter your existing password and your new password twice and select <strong>Save</strong>. Your new password is saved.</td>
</tr>
<tr>
<td><img src="image2.png" alt="Change Password Dialog Box" /></td>
<td></td>
</tr>
<tr>
<td><strong>Note</strong></td>
<td></td>
</tr>
<tr>
<td>Depending on your institution’s setup, you may be required to use passwords of a certain length, to include certain characters in your password, or to change your password at certain times.</td>
<td></td>
</tr>
<tr>
<td><img src="image3.png" alt="Change Password Dialog Box" /></td>
<td></td>
</tr>
<tr>
<td><img src="image4.png" alt="Icon" /></td>
<td>Disable New Layout - Starting from <strong>September release</strong>, all users are switched to the new Alma layout. You can disable it (for yourself only) and switch back to the original layout by selecting <strong>Disable new layout</strong> option. To switch back to the new layout, select <strong>Enable new layout</strong> in the same location. <strong>Note</strong>: This option will be removed when the new Alma layout becomes exclusive (planned for the March 2021 release).</td>
</tr>
<tr>
<td><img src="image5.png" alt="Icon" /></td>
<td>User Details – Display details about your user on the User Details page. For more information, see <strong>Editing Users</strong>.</td>
</tr>
<tr>
<td><img src="image6.png" alt="Icon" /></td>
<td>Detach from social account – If your user account has been associated with a social account and you want to disassociate the two, select this option to do so. This appears only if the user account is associated with a social account.</td>
</tr>
<tr>
<td><img src="image7.png" alt="Icon" /></td>
<td>UI preferences (on all pages other than the home page) – This submenu enables you to select the font size of the UI and whether the pages are presented with gutters (default) or full width. Select the font size (Display Density) and Page Layout to suit you. Your selection is saved between sessions. Click the Shortcut Customizations link to view the global Alma keyboard shortcuts and disable some of them, if needed. See <strong>Global Alma Hot Keys</strong>.</td>
</tr>
<tr>
<td><img src="image8.png" alt="Icon" /></td>
<td>Sign Out – Log out. See <strong>Logging Into and Out of the User Interface</strong>.</td>
</tr>
<tr>
<td><img src="image9.png" alt="Tasks list" /></td>
<td>Tasks list - A list of task types that may require your attention. Each line indicates the task type and the number of tasks of that type. Select a line to open the page that enables you to manage these task types. For more information see <strong>Tasks in the Task List</strong> and <strong>Assigned to Me, Unassigned, Assigned to Others Tabs</strong>.</td>
</tr>
<tr>
<td><img src="image10.png" alt="Configuration page link" /></td>
<td>Configuration page link. For more information, see <strong>Configuring Alma</strong>.</td>
</tr>
<tr>
<td><img src="image11.png" alt="Chat with Support link" /></td>
<td>Chat with Support link. Opens the Ex Libris Support page, which allows staff users who have chat permissions to start a chat session with our Support team regarding the following types of issues:</td>
</tr>
<tr>
<td><img src="image12.png" alt="Chat with Support link" /></td>
<td>Simple how-to questions and configurations</td>
</tr>
</tbody>
</table>

Ex Libris, a ProQuest Company
Help link – A menu of help options. Select one of:

- **Browse Online Help** – Open the Online Help.
- **Help For This Page** – Open the Online Help page that is relevant to the current UI page that you are on.
- **Alma Known Issues Fix Schedule** – Open the Alma Known Issues Fix Schedule page to view issues that are scheduled to be fixed in the upcoming months. You must have the Known Issues Operator role to use this feature. For more information about this feature, see Alma Known Issues: Q&A.

Alma Known Issues Fix Schedule Page

You can filter and sort the page. Each issue includes an issue number, summary, description, SF case number(s), Alma component, status, and target release version. The statuses are:

- **Fixed** – Resolved in this or a previous release.
- **Pending Release** – Resolved in an upcoming release.
- **Scheduled** – Not yet resolved.

- **What’s New Videos** – View a page with links to the most recent video tutorials.
- **Alma Release Schedule** – Display a pop-up with the last several, and next several, Alma sandbox, production release, and release update dates.

Release Dates Pop-up

The current release version and build number appear at the bottom of the Help menu. For premium sandbox customers, when working in the sandbox, the build information indicates the date that this build was cloned from production. An asterisk in the Release Update column indicates the date of the next scheduled refresh.

- **Suggest an Idea** – Suggest an idea to Ex Libris. Select to open the Ex Libris Idea Exchange page in a new window.

Ex Libris, a ProQuest Company
<table>
<thead>
<tr>
<th>Icon</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td><img src="image" alt="Ex Libris Icon" /></td>
<td><strong>Ex Libris Idea Exchange</strong></td>
</tr>
</tbody>
</table>

**Note**

Your administrator may have removed this link. See [Configuring Other Settings](#).

- **Generate Tracking ID** – Generate a tracking ID for your Salesforce case to assist Ex Libris in debugging a problem. Use this when an error occurs but the error message does not contain a tracking ID. You should generate the ID as soon as possible after the error.

  Please use this unique tracking ID when reporting an issue: E08-0684133562-TEB-H-DEALER

**Generate Tracking ID**

**Note**

The tracking ID is not enough to resolve your issue. You must still provide as many details of the problem as possible, such as the steps in the workflow that led to the error, which entities were involved (user identifier, item barcode, and so forth.), and any other information that might be relevant.

Watch the [Tracking ID Generator](#) video

- **Generate Performance Tracking File** – Generate a performance tracking file if Alma displays performance issues, such as long search times. Open a support issue and attach the file to the issue. The information in the file can help the support team resolve the issue. Generate the tracking file immediately after experiencing the performance issue, before doing any other action.

**Note**

The Performance Tracking File is not enough to resolve your issue. You must still provide as many details of the problem as possible, such as the steps in the workflow that led to the error, which entities were involved (user identifier, item barcode, and so forth), and any other information that might be relevant, such as a screencast recording and more.

- **Instance Name** - Displays the name of the environment currently in use.
- **Instance Location** - Displays the location of the data center for this instance.
- **Premium Sandbox** – Connect to your Alma premium sandbox, if you have one. For detailed information on sandbox environments, see [Alma Sandbox Environments](#). If the Institution has at least one SAML CAS profile, hover over the link to open a sub-menu with links to Premium Sandbox using different profiles. If the institution has no SAML CAS profiles, then there is a single link to log in to the Premium Sandbox.
- **Standard Sandbox** – Connect to your Alma standard sandbox, if you have one. For detailed information on sandbox environments, see [Alma Sandbox Environments](#).
- The date of the last indexing appears, which could be either the status of the last semi-annual indexing or the status of any indexing process initiated by the system or by customer support. The semi-annual reindexing is full reindexing of the Alma repository, done twice a year (generally in July and December; for a more detailed explanation see [here](#)). While semi-annual indexing runs, it appears under Running Jobs tab (Admin > Monitor Jobs) with the following details: Job...
<table>
<thead>
<tr>
<th>Icon</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td></td>
<td>category &quot;SP', Creator 'System'. If you want to run a full reindexing at other points in time, contact Ex Libris Support. If you are a Depositing Administrator, General System Administrator, or Repository Administrator, the date that appears here is a link. Select the link to view the indexing job report.</td>
</tr>
<tr>
<td>◦</td>
<td>A link to the most recent Alma release notes.</td>
</tr>
<tr>
<td>◦</td>
<td>In your sandbox environment, the date of the last clone from production.</td>
</tr>
<tr>
<td>◦</td>
<td>The date of the last CZ update that was implemented in your system. For details, see Synchronize Changes from CZ.</td>
</tr>
<tr>
<td>![DARA link icon]</td>
<td>DARA (Data Analysis Recommendation Assistant) link – Displays the number of DARA recommendations that are available, and provides a shortcut to the Manage Recommendations page (Admin &gt; Recommendations &gt; Manage Recommendations). This link display only when there are available recommendations. For more details, see DARA – Data Analysis Recommendation Assistant.</td>
</tr>
<tr>
<td>![My Activity Center icon]</td>
<td>My Activity Center pane - allows you to view and access your recent activity, including the Recent Entities list that lists all the entities you have added, updated, and deleted within the last 7 days. You can scroll through the list and select an entity to resume your work, or you can view the entity in view-only mode. The Recent Entities list is a helpful way to find the records you have recently accessed, even if you do not remember their names. It also allows you to easily view your recent changes to your records. At any moment you can open and close the Recent Entities list, and then resume your ongoing work without interrupting its context. For more details, see Recent Entities List.</td>
</tr>
</tbody>
</table>

Page Header and Summary Panel

A page header appears below the persistent search box.

Purchase Order Line Details Page

The page header contains:

- A back icon

  🔄, if this page was opened from a list or as part of a larger procedure.

- The page title.

- Any relevant actions (as buttons) to perform page-level actions on the page.

  ◦ The default action (typically Save) is highlighted in blue.
  ◦ If there are too many actions to display, additional actions are available in the or ... menu to the right of the displayed actions.
On many pages, a summary panel appears to the right of the page (if the screen size is small, it might appear below the page header). The summary panel provides information about the page's contents (for example, information about an inventory item, PO line, or user). The summary header typically includes the entity's identifying number, status, and an info icon. Click the Info icon at the bottom of the panel to see who create the entity, when, and when it was last updated.

---

**Tasks in the Task List**

Several pages in Alma contain tasks that may be assigned to you or others. These tasks may also appear in the tasks list that is accessed from the persistent menu. The following tasks can appear in the task list. Note that the task list is also available as a home page widget (see [Managing Widgets](#)). For more information, see [Assigned to Me, Unassigned, Assigned to Others Tabs](#).

- Approve Deposits - Assigned to Me
- Approve Deposits - Unassigned
- Approve Deposits - Assigned to Others
  - For information about approving deposits, see [Approving Deposits](#).
- Borrowing requests - New - with no partner - assigned to you
- Borrowing requests - New - with no partner - unassigned
- Overdue borrowing requests - assigned to you
- Overdue borrowing requests - unassigned
- Borrowing requests cancelled by partner - assigned to you
- Borrowing requests cancelled by partner - unassigned
- Borrowing requests recalled - assigned to you
- Borrowing requests recalled - unassigned
- Borrowing requests conditional - assigned to you
- Borrowing requests conditional - unassigned
- Borrowing requests returned by patron - assigned to you
- Borrowing requests returned by patron - unassigned
- Borrowing requests with active general messages - assigned to you
- Borrowing requests with active general messages - unassigned
- Borrowing requests completed with active general message - assigned to you
- Borrowing requests completed with active general message - unassigned
- Borrowing requests with active notes - assigned to you
- Borrowing requests with active notes - unassigned
  - For information about managing borrowing requests, see [Managing Resource Sharing Borrowing Requests](#).
- Electronic resources - activation - assigned to you
- Electronic resources - activation - passed due date - assigned to you
- Electronic resources - activation - passed due date - unassigned
- Electronic resources - activation - unassigned
  - For information about activating electronic resources, see [Managing Electronic Resource Activation](#).
- EOD import match issues
• EOD import validation issues
• Import match issues
• Import validation issues
  For information about resolving import issues, see Resolving Import Issues.
• Invoices - approval - assigned to you
• Invoices - approval - without assignment
• Invoices - review - assigned to you
• Invoices - review - without assignment
  For information about reviewing and approving invoices, see Reviewing Invoices and Approving Invoices.
• Items - deposit
• Items - digitization
• Items - document delivery
• Digitization requests - approval
  These tasks appear only when you are at a digitization department. For information about managing digitization requests, see Digitization Processing.
• Items - in department
• Items - in department - requested by patron
• Requests - pickup from shelf
  For information about managing items, see Managing Requests and Work Orders and Pickup at Shelf.
• Lending requests - New - assigned to you
• Lending requests - New - unassigned
• Lending requests - Overdue - assigned to you
• Lending requests - Overdue - unassigned
• Lending requests - Recalled - assigned to you
• Lending requests - Recalled - unassigned
• Lending requests - Conditional - assigned to you
• Lending requests - Conditional - unassigned
• Lending requests failed locate - assigned to you
• Lending requests failed locate - unassigned
• Lending requests with active general messages - assigned to you
• Lending requests with active general messages - unassigned
• Lending requests - completed with active general message - assigned to you
• Lending requests - completed with active general message - unassigned
• Lending requests with active notes - assigned to you
• Lending requests with active notes - unassigned
  For information about managing lending requests, see Managing Resource Sharing Lending Requests.
• Order Lines - deferred - assigned to you
• Order Lines - packaging
• Order Lines - review - assigned to you
• Order Lines - review - unassigned
• Order Lines - waiting for renewal
• Order Lines in evaluation - analysis
• Order Lines in evaluation - draft
• Order Lines in evaluation - requested
• Order Lines with claims
• Orders - approval
• Orders - review
  For information about managing PO lines, POs (orders), renewals, deferrals, and evaluations, see Reviewing PO Lines, Reviewing POs, Processing Renewals, Reviewing Deferred PO Lines, and Managing Trials.
• Purchase requests - In Review - assigned to you
• Purchase requests - In Review - unassigned
  For information about managing purchase requests, see Managing Purchase Requests.
• Reading List - Unassigned
• Reading List - Unassigned - complete
• Reading List - Unassigned - processing
• Reading List - Unassigned - reading for processing
• Reading List - Assigned to Me - reading for processing
• Reading List - Assigned to Me - List with new note
• Reading List - Unassigned - List with new note
  For information about managing reading lists, see Managing Reading Lists and Removing Alerts from Citations.
• Citations - Copyright waiting for approval
• (Leganto customers only) Citations - Marked as broken
• Citations - Ready for processing
• Citation has a New File
• (Leganto customers only) Citations - Assigned to Me - have new notes
• (Leganto customers only) Citations - Unassigned - have new notes
  For information about managing citations, see Managing Citations.
• (Esploro customers only) Research Deposits - Assigned to Me - Draft
• (Esploro customers only) Research Deposits - Assigned to Me - Resubmitted
• (Esploro customers only) Research Deposits - Assigned to Me - Submitted
• (Esploro customers only) Research Deposits - Assigned to Me - Under Review
• (Esploro customers only) Research Deposits - Assigned to Me - Returned
• (Esploro customers only) Research Deposits - Assigned to Me - All
• (Esploro customers only) Research Deposits - Unassigned - Draft
• (Esploro customers only) Research Deposits - Unassigned - Resubmitted
• (Esploro customers only) Research Deposits - Unassigned - Submitted
• (Esploro customers only) Research Deposits - Unassigned - Returned
• (Esploro customers only) Research Deposits - Unassigned - All
  For information about managing research deposits, see Managing Research Deposits.
• DARA Recommendations - Recommendations - Active
Configuring Alma

Some configuration options are available to non-administrators, and these options are described in the documentation, where applicable. The majority of Alma’s configuration options are available on dedicated configuration pages, and are relevant only for administrators. These pages located in the Alma Configuration menu, which you access by selecting the Configuration page link at the bottom of the Navigation bar.

To open Alma Configuration:

1. Select the icon. The following changes take place:
   - The Alma Main Menu changes to the Alma Configuration Menu. To distinguish it from the Alma menu, the bar color changes to the default primary color in the user interface, and its icons feature a cog wheel to distinguish them from the regular Alma icons.
   - The persistent search bar disappears, and the dropdown of units to configure appears instead.
   - Instead of the main Alma window, a dedicated screen opens.

2. In the top dropdown, select the unit to configure.

3. Select the functional area to configure, such as Acquisitions, and find the specific configuration tool you need.

4. To close Alma Configuration and to return to the task you left in Alma, select the icon.

Throughout this document, any reference to the configuration menu uses a path of menu and sub-menu elements as follows: Configuration Menu > main section > sub-section > specific option, for example Configuration Menu > Fulfillment > Location > Remote Storage. If the resulting page is also a menu of options, these options may appear in the documentation as additional elements to the path.

Select Back to Alma to return to Alma. For information about configuration, see the following sections.

- Configuring Acquisitions
• Configuring Fulfillment
• Configuring Resource Management
• Configuring User Management
• Configuring General Alma Functions
• If you are managing multiple institutions working with a Network Zone, see Administering a Network Zone

The Alma Configuration page includes a Configuring drop-down box to select the location to configure: the institution or a specific library. When you enter text in the search box, the list of configuration options is filtered to include only the options that match your entered text, with the text highlighted in the matching options. The number of matching options in each Alma area appears next to the area tab on the left.

Global Alma Hot Keys

A long list of global keyboard shortcuts (shortcut keys) is available in Alma. You can view the full list on the Shortcut Customization page (User menu > Shortcut Customization).

For any action that begins with pressing the Alt key, the action letter or number appears on the page when you press the Alt key. On a page that has tabs, enter the tab number (even if it contains multiple digits) while pressing the Alt key to open that tab. When you release the Alt key, Alma opens the tab corresponding to the number you entered.

You can disable some Alma keyboard shortcuts. You may want to do that in cases when your language requires usage of the same keyboard keys for typing accents or diacritics. To do that, disable the slider by that shortcut. Note that you can only disable an Alma shortcut, but cannot define a different Alma shortcut for the same action.

Additional shortcuts are available on the Patron Services (see Managing Patron Services) and Manage Item Returns (see Returning Items) pages.

For information on the keyboard shortcuts available in the MD Editor, see MD Editor Menu and Toolbar Options.

Copy Option When Selecting Text

When selecting text in Alma, a small pop-up menu with the option to copy the text appears. Select the option to copy the text; a confirmation check mark briefly appears.
This section presents icons that appear in various places in Alma. Also see Search Result Icons.

Info Icon

You can see additional information about certain items by selecting the Info icon on some pages in Alma, for example the Purchase Order Lines Details page. When you select the Info icon, a pop-up appears with information about the item on the page: created by, last updated by user/job, and (where applicable) modified by information.

Info Icon Pop-up
User Information Icon

You can display user information by selecting the **User Information** icon beside a user name on various pages and pop-up windows, such as the User Details page.

Select the icon to display user information:

![User Information Icon](image)

Creator Info Icon

Select the icon to display user information:

![Creator Info Icon](image)

User Information

An administrator can define which user information fields are displayed in this pop-up box. See Configuring User Information for Pop-ups.

Translate Information Icon

If your institution supports multiple languages, Alma translates system-defined UI elements, such as messages and field names into the language selected by the user. You may also want to enable the user to view certain entered information in the user's selected language. See Configuring Institution Languages.

A limited number of fields in Alma support this ability. When multiple languages are enabled, these fields appear with a **Translate Information** icon.

![Translate Information Icon](image)

For example:
Select the icon to open a dialog box that enables you to enter the field's information in the other enabled languages.

Messages

Alma returns messages on many pages based on your actions or missing or required information. Messages appear in a notification bar on the side of the page. The notification bar displays message types of Information, Error, and Success, each with different icons and colors. In confirmation dialog boxes and other smaller panes, the messages appear on the page (not floating). If you ignore a message but continue to work on the page, the message is minimized to its icon and remains on the page.

- Success – An action you performed succeeded. In the case of a long action that initiates a job, success only means that the job was submitted successfully, not that the results of the job were successful. After successfully submitting a job, you can select the job number in the message to open the Manage Jobs page (see Viewing Running Jobs).

Select X to remove the message or > to minimize the message. When enabled by Ex Libris, you can select Collapse by default to make all success messages on this page appear initially collapsed.
• Error – Your action could not be performed, or it failed. The message indicates the reason for failure, when available (see also Generate Tracking ID in The Persistent Menu). Select > to minimize the message.

Error Message

• Information – An indication of a normal event about which you should take notice. Select X to remove the message.

Information Message

Tabs

Many pages contain too much information to fit on one page, or information that is better grouped together on subpages. These pages contain tabs at the top of the information. On some pages, the name of the page and some information at the top of the page (above the tabs) remains as you navigate between tabs. On other pages, navigating to a new tab may change the page name and remove or replace the top information.

In addition, many pages contains tabs with similar functionality. For more information, see Common Alma Tabs.

"Has Content" Indication

When a page contains multiple tabs, a blue icon

indicates that the tab has a table or list with user-configured or system-generated content.

For example:

Example of Has Indicator Indication

Note

Although a tab may contain information in its form section, the "Has Content" indication appears only when a table or list on the tab contains contents.
Common Alma Tabs

Many pages in Alma contain tabs with similar functionality.

Assigned to Me, Unassigned, Assigned to Others Tabs

Several pages in Alma contain tasks that may be assigned to you or others. Tasks are items or requests that are waiting for attention from an operator. Pages with tasks are divided into three tabs, as follows.

• **Assigned to Me** - These items are assigned to you. This tab provides the most options, typically including the option to unassign the item or assign the item to another operator.

• **Unassigned** - These items are not assigned to any operator. You may be able to perform most actions on this page, but not as many as you can perform on the Assigned to Me tab. If you have the relevant permissions, this tab also allows you to unassign the item or assign the item to yourself or to another operator.

• **Assigned to Others** - These items are assigned to another operator. This tab provides the fewest actions to perform. If you have the relevant permissions, this tab allows you to unassign the item or assign the item to yourself or to another operator.

When you select to change the assignment, a dialog box appears. You can enter the target operator and an optional note, and whether to send the operator an email about the assignment.

![](assign_to_dialog_box.png)

**Assign To Dialog Box**

Notes Tab

The **Notes** tab enables you to view, add, or remove notes that are relevant to the page. It appears on many Alma pages, such as:

• The PO Line Summary page when editing a PO line
• The Physical Item Editor page when editing item records
• The License Terms Details page when editing license details
• The Vendor Details page when editing vendor information

Add a note using by selecting **Add Note**. To edit a note, select **Edit** from the row actions menu.

![](notes_tab.png)

**Notes Tab**

Ex Libris, a ProQuest Company
To delete a note, select **Delete** from the actions row menu and select **Confirm** in the confirmation dialog box.

**Attachments Tab**

The **Attachments** tab enables you to view, attach, and remove attachments relevant to the page. It appears on many Alma pages, such as:

- The Trial Details tab when editing trial information
- The Invoice Details page when editing invoices
- The Resource Sharing Borrowing request page when editing a borrowing request.

To add an attachment, select **Add Attachment**. Browse for a file, add a URL and/or note, if required, and select **Add Attachment**.

To edit an attachment, select **Edit** in the row actions menu.

To delete an attachment, select **Delete** in the row actions menu and select **Confirm** in the confirmation dialog box.

To download a file, select **Download** in the row actions menu, browse to the download folder, and select **OK**.

The maximum attachment size is 25 MB. Emails sent to a user or regarding a PO line page appear in this tab.

**History Tab**

The **History** tab displays the history of changes to the fields on the page.

**Note**

A new or removed value in a field is considered a change. The first value assigned to a field is not considered a change.

The tab appears on many Alma pages, such as:

- The PO Line Summary page when editing a PO line
- The Physical Item Editor page when editing item records
- The License Terms Details page when editing license details
In some instances, the History tab contains radio buttons that allow you to change the types of changes appearing in the list. For example:

- The History tab of the Monitoring Jobs page has a different functionality. For more information, see Viewing Running Jobs.
- The Operator column appears only for managers and administrators. See Configuring Users' Ability to View Operator Details.

Drop-Down and Quick Pick Lists

In the various drop-down lists, you can enter part of the field name and then select it from the list of matching terms that appears.
For some drop-down lists, terms are grouped into expandable/collapsible sub-menus.

Recent terms that you selected appear at the top of the list.
Quick pick lists also allow you to select an item from a list, but provide more information and context for the selection. A quick pick list can be identified by the icon in the field.

When selecting an item from a quick pick list (vendors, funds, users, and so forth), the list appears in an overlay pane, rather than on a new page. Select an item by selecting the item’s row. If you have previously selected items of this type, select the Recent icon in the selection field to select any recently selected item.

Recently selected items may be disabled on certain pages due to privacy concerns.
Lists and Tables in Alma

This section presents information to help you work with the lists and tables that appear various locations in Alma.

Common Table/List Types

The sections below show common types of lists and tables in Alma.

Record Lists

Pages with record lists display one or more Alma records vertically down the page, such as search results (see Searching in Alma), borrowing requests (see Managing Resource Sharing Borrowing Requests), reading list citations, vendors, and so forth.

Electronic Titles Search Results in the Community Tab (with an example showing activation/availability icons for electronic collections/portfolios)

Electronic Portfolios Search Results in the Community Tab (with examples showing activation/availability icons for electronic collections/portfolios)
Lists appear with:

- Where relevant, **Assigned to You, Unassigned, and Assigned to Others** tabs. See [Assigned to Me, Unassigned, Assigned to Others Tabs](#).
- A **table actions list**, if any. See [List, Table, and Row Actions](#).
  - The second to last link
    
    ![Export to Excel](#)

    is an option to export the displayed elements in the table to Excel (see [Export to Excel](#)).
  - The last link
    
    ![Customize](#)

    enables you to customize how the results appear in the list; see below.
  - Pagination options, when required (see [Pagination](#))
  - Facets for filtering the items on the list (see [Facets, Filters, and Secondary Search](#))

Each item in the list appears with:

- Its number in the list
- A check box, if there is a page-level action that can be performed on multiple items in the list
- The item's name, typically linked to a page where you can view more information about the item
- Various other information fields about the item
- A **row actions list** that enables you to perform actions on the item. See [List, Table, and Row Actions](#)
- If you are returning to this page after having viewed or edited an item in the list, that item is highlighted (see [Last Item Edited Indicator](#)).
- On some pages, additional information appears in tabs at the bottom of each list item. For example:
  - Inventory in search results (see [Viewing Inventory/Other Details](#)) and citation details in reading lists (see [Managing Citations](#)) may appear. Select one of the tabs to expand or collapse this information. If an **Expand** table action is present, you can use it to pre-select that all tabs, or all tabs of a certain type, are expanded by default.
  - Electronic collection and portfolio details may be expanded for a particular title in the Community tab with icons indicating activation and/or availability. See the icon tooltips for additional information.
Record List Fields with Multiple Values

Some fields in repository search results may have multiple values. For example, in the All titles, Physical titles, Electronic titles, and Digital titles repository search results, multiple values can appear for the Record number field when there are multiple 035 $a entries in the cataloging record. When a field has multiple values, the search results appear with the multiple values icon ( ). Select the multiple values icon to display all the values for the field. In the case of the Record number field, the multiple 035 $a values appear listed in the same order as presented in the MD Editor.

Record Number with Multiple 035 $a Entries

The values that appear can be copied for copy/paste actions and can be exported using the Export list icon. When multiple values are exported to Excel, they are concatenated and delimited by a semi-colon.

Record Number with Multiple 035 $a Entries Exported to Excel

Record List from Single Record Search

When viewing a record list as a result of searching for a single record to select (such as when selecting Change Bib Record for a PO line), you can select the record by selecting anywhere in the record row.

Configure Record List Appearance

You can configure the fields, columns, and actions that appear on record lists. Select the Manage Column Display icon in the table actions list to open a configuration pane.

Record List

The pane may not appear fully expanded. Select Show all to expand the pane.
You can configure the fields that appear for each item in the record list. Select a column layout to change the number of columns. Drag and drop fields between columns. Hide a field by clearing the field's check box.

You can drag and drop actions to configure which ones appear as the two action buttons. You can also clear an action so that it does not appear when you right-click the repository item (note that the action continues to appear when you select the ... menu).

---

**Note**

- For an entry in the list, if the entry does not contain a value for a field, the field does not appear.
- Currently, when configuring the available row actions on a page, the list of row actions displays *all actions that can be performed on the kinds of entries that populate the list*, even if these actions do not appear on the page (this is most noticeable on pages where the entries are PO lines). Regardless of the row actions that you select to appear while configuring, if the action is not relevant for the page or the entry, it does not appear in the row actions.

---

After you customize the columns on this page, the Manage Column Display icon displays a small green dot in the lower right corner.

![](image)

When you select the icon again, the **Restore list defaults** option appears. Select to restore the fields and actions to their out-of-the-box settings.

**List Tables**

List tables display one or more elements vertically down the page in a table format. For example, the Reading Lists Task List page. They are often used to present tasks to the user: the list of resources, tasks, orders, or users that require operator attention (see [Tasks in the Task List](#) and [Assigned to Me, Unassigned, Assigned to Others Tabs](#)).
List tables appear with:

- When presenting a list of tasks, the table usually contains **Assigned to You**, **Unassigned**, and **Assigned to Others** tabs. See [Assigned to Me, Unassigned, Assigned to Others Tabs](#).
- A **table actions list**, if any. See [List, Table, and Row Actions](#).
  - The second to last link
    ![Export to Excel](#)
    is an option to export the displayed elements in the table to Excel (see [Export to Excel](#)).
  - The last link
    ![Customize Columns](#)
    enables you to customize the columns that appear. Select or unselect columns to appear in the table, and then select **Done**. For more information, see [Working with Table Columns](#).
- In some cases, you may have options to sort the list. You may be able to move an item down or up the list by selecting the up or down arrows in the **Move Up** and **Move Down** columns. Or you may be able to drag and drop items by selecting and dragging the drag and drop icon
  ![Drag and Drop](#)
  . The selected row is highlighted, and, as you drag the row up and down the table, a blank bar appears below or above other rows, indicating to where the selected item will be dropped.
- Pagination options, when required (see [Pagination](#))
- Facets for filtering the items on the list (see [Facets, Filters, and Secondary Search](#))

Each item in the list table appears with:

- Its number in the list
- Various information fields about the item
- A **row actions list** that enables you to perform actions on the item. See [List, Table, and Row Actions](#).
- If you are returning to this page after having viewed or edited an item in the list, that item is highlighted (see [Last Item Edited Indicator](#)).

## Code Tables

Code tables are typically available only to administrators. They display a list of options that may be available as a drop-down list in some other area of Alma.
Shipping Method Code Table

Code tables appear with:

- The page title **Code Table**
- A summary header with basic information about the table
- A *table actions list*, if any. See [List, Table, and Row Actions](#).
  - The first option enables you to import information to the table (see [Importing Code Table Information](#)).
  - Another option enables translation for multi-language institutions (see [Code Table Label Translation](#)).
  - **Add Row** enables you to add a new row, when available (see [Adding Lines to Tables](#)).
  - The last link
    - is an option to export the displayed elements in the table to Excel (see [Export to Excel](#)).
- The option to **Cancel** your changes or **Save / Customize** to save your changes

Each item in the list appears with:

- Its number in the list
- The option to enable/disable the element by toggling a slider; a blue slider indicates that the element is enabled; a gray slider indicates that the element is disabled. These sliders are not functional on all code tables. If the slider colors are muted ( ), you must first enable the line using the **Customize** row action before you can change their values.
- The options to move an item down or up the list by selecting the up or down arrows in the **Move Up** and **Move Down** columns
- The code and description of the item. These can often be changed, either directly or after selecting **Customize** in the item's row actions list. Select **Save** after making any changes to the table.
- The option to select one of the items as the default value. Only one value can be selected. For some tables, this value may be disabled or may have no relevance.
- The user who last changed the element and the date of the last change
- A *row actions list*, typically containing at least the option **Customize** if you have not yet customized the list, or **Restore** if you have. Select **Restore** resets the row to its original value. After selecting a row action, select **Save** at the top of the page to save your changes. When available, select **Delete** to remove the row.
Mapping Tables

Mapping tables are typically available only to administrators. They display configurable elements that control other areas of Alma.

VAT Codes Mapping Table

Mapping tables appear with:

- The page title Mapping Table
- A summary header with basic information about the table
- A table actions list, if any. See List, Table, and Row Actions.
  - Add Row enables you to add a new row, when available (see Adding Lines to Tables).
  - The last link
    - is an option to export the displayed elements in the table to Excel (see Export to Excel).
- The option to Cancel your changes or Save to save your changes

Each item in the list appears with:

- Its number in the list
- The option to enable/disable the element by toggling a slider; a blue slider
  - indicates that the element is enabled; a gray slider
- The key (code) and other information for the item. These values, other than the key, can often be changed, either directly or after selecting Customize in the item’s row actions list. Select Save after making any changes to the table.
- The user who last changed the element and the date of the last change
- A row actions list, typically containing at least the option Customize if you have not yet customized the list, or Restore if you have. Select Restore resets the row to its original value. After selecting a row action, select Save at the top of the page to save your changes. When available, select Delete to remove the row.
Rules Tables

Rules tables are typically available only to administrators. They contain a series of checks that Alma performs automatically during the course of some process. For example, there are rules to determine if an invoice is sent for review or automatically approved, and rules to determine if a purchase request is automatically generated for a citation added to a reading list.

- Each rule has one or more criteria for Alma to check to see if the rule applies to the current object being evaluated.
- When the relevant process occurs in Alma, for example a patron hold request, Alma checks each enabled rule in the relevant rules table, in the order in which they are listed, starting with the first rule in the list. If Alma finds a rule whose criteria matches the object being evaluated, Alma performs the action specified by the rule. Once Alma finds a match, Alma does not check any other rule in the list.
- If none of the enabled rules match the object being evaluated, the default rule is checked, if such exist.
- If none of the enabled rules match the object being evaluated, and the default rule also does not apply (or if there is no default rule), Alma performs the default action. Typically this is "do nothing", but a different default action may apply for a particular process. In some cases, the default action can be specified using a customer parameter.
- See the relevant documentation pages for details or exceptions to the above.

You can perform the following actions on rules tables:

- Add a rule: Select Add Rule in the table actions list. The new rule is added to the end of the list. By default, each new rule is enabled.
- Edit a rule: Select Edit in the row actions list.
- Duplicate a rule: Select Duplicate in the row actions list. Edit the rule as required. The new rule is added to the end of the list. By default, each new rule is enabled.
- Delete a rule: Select Delete in the row actions list.
- Enable/disable the rule: Toggle the slider. A blue slider indicates that the rule is enabled; a gray slider indicates that the rule is disabled.
- Change the rule order: Select the up or down arrows in the Move Up and Move Down columns for the rule that you want to move up or down in the list.

When you add or edit a rule, a page similar to the following one appears:
• Each rule requires a name. You can also enter an optional description.

• In the Input Parameters area, you can enter multiple criteria for the rule. On most pages, select Add Parameter to add criteria (in Acquisitions pages, all aspects are already present on the page in their own row). You can edit or delete criteria.

• Each criteria consists of three elements:
  ◦ **Name** - The aspect you want to evaluate (such as the user group of the user who scanned a book or the date a request was made).
  ◦ **Operator** - An evaluation operator, such as =, <, >, Not equals, inList, NotInList, is empty, is not empty, or contains.
  ◦ **Value** - The matching value or values (for inList and NotInList, select all that apply).

• Each input parameter (Name) can be selected only once for each rule.

• In the Output Parameters area, (on some pages this area is called Workflow Setup), enter or select the action to perform, as described on the relevant documentation page. The value may simply be True or False, indicating whether or not Alma performs a certain process. Or there may be several values to enter or select.

• After making any changes, select **Save**.

In the above example, if this rule is triggered, a 10 USD fee is added to the shipping cost when lending an item to the resource sharing partner East FN. Note that if a lower numbered rule is triggered, the action specified by this rule (add 10 USD to the shipping fee) is not applied, even if the criteria matches the lending request.

---

**List, Table, and Row Actions**

A page containing a table or list may present actions that apply to the entire table or list, or to all selected items in the table or list. This list is called the **table actions list** and it appears at the top of the table. If there are too many actions to display, additional actions are available in the **Actions** menu to the right of the displayed actions. If any of the actions can apply to selected items only, or if a page-level action (such as **Select**) can apply to selected items only, each item in the table or list appears with a check box.

---

**Table Actions List**

All table actions lists include the **Export Menu** icon
Rows in the table or list contain the row actions list, which are actions that apply to the specific item in the row. You can access the row actions list from the ... menu at the right of the list or by right-clicking the item anywhere in the row as long as you are not right-clicking directly on a link). For some lists, one or two actions may be visible directly in the row.

**Adding Lines to Tables**

For most tables, you can add a new item by selecting Add Row or Add <X> above the table. A pane to enter the new row's information appears.

Enter any required or optional information, or select the values from the drop-down lists, and select Add or Add <X> (to add the item without closing the pane) or Add and Close in the pane. All (non-obvious) fields are described on the relevant documentation page in this guide.

Areas within pages in which you can add multiple lines (such as locations for ordered items) also use Add <X> at the top of the area.
Importing Code and Mapping Table Information

On many code tables New for November! and on mapping tables, you can select **Import** in the table actions list to import data to the table in bulk. Importing information overrides all of the existing entries in the table.

Excel files can be imported in either *.xlsx or *.xls formats. For code tables, the Excel sheet must be named **CodeTable** and that the code column needs to be **Code** (case-sensitive). For mapping tables, the Excel sheet must be in a specific structure. It is recommended that you export the existing table to get the existing values and the structure (if relevant), make your changes, and then import the changes back to Alma, as described below.

**To import code table information:**

1. Export the file using **Export > Excel** (see Export to Excel).
2. Open the Excel file and rename the Excel sheet **CodeTable**.
3. Make your changes and save the file. Note that there should be no duplicate lines in the Excel file.
4. Select **Import** on the relevant page. The Import Tables page appears.
5. Select **Browse** to locate your file.
6. Select **Import** to upload the file. The contents of the file appear on the page.
7. Review your changes and select **Import** to import the changes to Alma.

**New for November! To export mapping table information:**

- The process as is for code tables, but without the need to change or rename the file.

The structure of the Excel file includes the actual codes that are imported back into Alma, in addition to columns of descriptions that help you make sense of the data, but are not imported. The description values can be duplicated. In addition, the Excel file includes additional sheets, which are also not imported back into Alma, that provide you with full lists of codes and values that can be inserted into the Alma dropdowns - you can use these sheets when adding new rows to the Excel file, instead of referring to Alma for these code/value combinations.

There cannot be duplicate lines in the codes that are imported back into Alma.
Export to Excel

On pages that contain lists or tables, you can export the list to Excel by selecting the Export Menu icon and selecting Excel. When exporting a table with hidden columns, you can choose to export only the visible columns or all of the columns, including the hidden ones.

Export Options

See also Importing Code Table Information.

There is a limit of 100,000 lines that can be exported at one time to Excel. If the amount of information to be exported exceeds the limit, the limit appears in the tooltip when you hover your mouse over the Excel option. Filter the list to be under the limit. Otherwise, note that only the first 100,000 are exported.

During the export, Alma displays a progress bar. Downloads proceed in the foreground. While the download is in progress, you can select Cancel to cancel the download in progress.

Note

If you do not want to wait for a download, you can instead create a set and run a job to export the set. For more information, see Running Manual Jobs on Defined Sets.

Tables that have an Enabled column are exported with the values Yes for enabled or No for disabled.

Table and Row Level Customization Mode

For some code and mapping tables, each row of the table functions as an independent unit and is customized independently, while other tables function as a single unit so all of the rows are customized together. The Customization mode field indicates whether the table is configured at the table level (Entire table needs to be customized) or at the row level (Specific rows can be customized). If you have customized a table whose customization mode is Entire table needs to be customized, new rows added by Ex Libris to this table in future releases will not be added to your table. If you have customized a table whose customization mode is Specific rows can be customized, new rows added by Ex Libris to this table in the future will be added to your table as well.

Table Level Customization
Multi-language institutions can configure translations of some code table labels. See Configuring Institution Languages. The workflow is different depending on whether the table is one that is configured at the table level or the row level (see Table and Row Level Customization Mode).

To customize translations of tables customized at the table level:

1. Change the language filter to a language other than English.
2. Edit the text in the Translation column.
3. Select Save.

To restore the translation changes in the table, select Restore Default Translations in the table actions list.

To customize translations of tables customized at the row level:

1. Change the language filter to a language other than English.
2. Select Customize in the row actions list to customize a row, or select Customize All in the table actions list to make all of the rows of the table available for customizing.
3. Edit the text in the Translation column.
4. Select Save.

To restore the translation changes in the table, select Restore Translations in the row actions list of the row that you want to restore or select Restore Default Translations in the table actions list to restore the translations for all of the rows of the table.
Facets, Filters, and Secondary Search

You can filter the items in a list or list table using facets, filters, and the secondary search. Some or all of these appear on a page containing a list.

Facets and Filters

Facets on the left of a list match one or more of the fields or columns on the page. Beneath each of these facets is one of the available values for that field, followed by (in parentheses) the number of currently unfiltered items that match that value. Select one of the values to filter the items in the list to only those that match the selected value. The selected value appears above the list with an X. Select the X to remove that value from the filter.

Some filters are permanent and appear over the list when the page first loads. The initial value of the filter may be pre-selected to the most common value, such as (in the above figure for borrowing requests) Active requests only.

Facets and filters are all single-select: you cannot select multiple values for a particular facet or filter.

The Facets panel bar can be collapsed to provide more room on the page while still remaining visible. It can be expanded again at any moment.

<table>
<thead>
<tr>
<th>Collapsed State</th>
<th>Viewing Facets in Collapsed State</th>
<th>To Restore</th>
</tr>
</thead>
<tbody>
<tr>
<td>Minimize the Facets pane by selecting &lt;&lt; beside the word Facets. The panel collapses into a small stripe on the left of the screen.</td>
<td>You can view the facets by hovering your mouse over the Facets stripe.</td>
<td>Select &gt;&gt; to restore the Facets pane.</td>
</tr>
</tbody>
</table>
Secondary Search

In the above figure, you can see also the secondary search box. When appearing above a table, a secondary search acts as another kind of filter for the table. Select a value from the drop-down list of fields, enter text, and select the search icon to filter the list. Note that this search is a "contains" search (except for a code search of the resource sharing partner list, which is a "starts with" search).

You can move the keyboard focus to the secondary search box on a page by pressing the forward slash / on your keyboard.

Secondary Search

On various other pages in Alma, you may use a secondary search to find or select a record, such as a user or vendor, on which to perform a certain action. These secondary searches are either plain text fields or quick pick lists (see Drop-Down and Quick Pick Lists).

Pagination

Some lists and list tables that contain a large amount of elements are paginated. For example:
Pagination

The pagination includes the current page and the total number of pages. Typically, each page displays 10 or 20 records by default. To navigate to other pages:

- Select one of the arrows < or > (or press Alt-, or Alt-) to display the previous or next page.
- Select a page number to display that page.
- Enter a page number in the small text box and select Go to display that page.
- You can select the number of lines per page. On some pages, the range is between 10 and 50. On other pages it is between 20 and 100.

Results Per Page Tool

Note

- Alma does not preserve selections that you make as you navigate from page to page (exception: Alma remembers your selection for results per page). All actions on the page apply only to the visible selections you make on that page.
- If the bottom pagination is not visible, a small floating version of the pagination element appears at the bottom of the page. To navigate to a specific page when the floating pagination is visible, select the page number, enter a new page number, and press Enter.

Last Item Edited Indicator

After editing (or viewing) an item in a list or table, and then returning to the list or table, the page automatically scrolls to the item that you were working on and a bar appears next to the item. For example:
Working with Table Columns

You can customize columns in lists and tables throughout Alma in the following ways:

- For columns that have up/down triangles, you can sort the rows in the table by that column by selecting the column heading. Select the column heading again to toggle between ascending and descending order.

  **Note**

  Sorting a table changes the order of the lines in the table, and your selected sort is retained when you leave and return to the page. However, the sort has no effect on how items in the table appear in other areas of Alma. For example, if you sort users in descending alphabetical order (Z to A) on the Find and Manage Users page, the relevant list of users still appears in ascending alphabetical order (A to Z) when selecting to assign a task to a user.

- Select between two column headings to change the width of table columns.
- Select and drag a column heading left or right to change the order of table columns.
- Hide and display columns by selecting

  ![Hide/Display Columns Pane](image)

  in the table actions list. To configure record list columns, see [Record Lists](#).

  - Clear the check box of a column and select **Done** to hide the column.
  - Select the check box of a hidden column and select **Done** to have it appear.
  - Select **Restore list defaults** to restore all columns to their original settings.

If you have previously customized the columns on this page, the icon has a small green dot in the lower right corner. When you select the icon, the option to **Restore list defaults** appears. Select to restore the columns to their out-of-
the box settings.

- Select the row list action **View Hidden** to display a pop-up of any hidden fields for that row. For example:

![Hidden Columns List](image)

**Note**

Customizations are retained for each list after moving to another page, logging out, and so forth.

For a video describing this feature, see [Show Hidden Columns](link).