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## General

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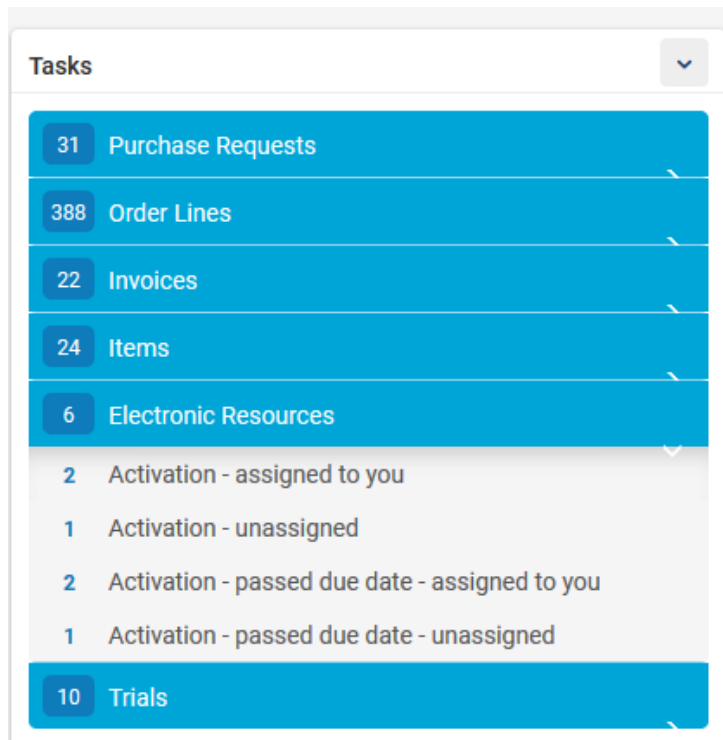
## General

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### What types of messages and alerts are supported in Alma?

For staff users, the system employs a roles based mechanism which allows the creation and management of specialized users that will perform different tasks.

These tasks are part of Alma's workflow engine which provides **Alerts** to these users to act according to the defined workflow. The following screenshot shows the 'Tasks Widget' which is displayed to users allowing them to enter directly to the relevant task they need to perform:



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### How are changes to records logged?

Many areas in Alma (such as user records, item records, vendor records, licenses, PO Lines, etc.) include history tabs that automatically record all actions made on a record - including date and time, staff user, old and new values where applicable and so forth. An example of the history tab on a purchase order can be seen following:

Date	Operator	Field Name	Old Value	New Value
08/08/2019 13:14	Super User	Acquisition method	-	Purchase
08/08/2019 13:14	Super User	Net price	0.0	100.0
08/08/2019 13:14	Super User	Expected activation after Ordering (days)	-	0
08/08/2019 13:14	Super User	Tertiary reporting code	-	REPLACEMENT
08/08/2019 13:14	Super User	Material type	-	Book
08/08/2019 13:14	Super User	List Price	-	100.00 USD
08/08/2019 13:14	Super User	Transaction Item	-	Accounting Serials(100.00 USD)
05/14/2019 12:56	Super User	Assignment User	-	Super User

## Are edits and updates by staff users logged?

Alma maintains a comprehensive audit trail of transactions made in the system, including the user ID, the exact operation and data that was accessed. The audit trail report is accessible and can be generated using Alma analytics reporting. Almost every operation made in Alma is logged and can be reported.

Prompts Advanced

Compound Layout

Title Audit Trail

User Id	User Accessing Operation	Accessing User Id	Event Date and Time	User Sub Entity List Name
779394680007173	Viewed	829200600007173	3/29/2022 6:03:15 PM	addressList emailList phoneList webAddressList
779394680007173	Viewed	829200600007173	3/29/2022 6:03:09 PM	addressList emailList phoneList webAddressList
779394680007173	Viewed	829200600007173	3/29/2022 6:02:52 PM	addressList emailList phoneList webAddressList
668668740007173	Viewed	204727650007173	3/29/2022 5:28:46 PM	identifiersList
204727650007173	Viewed	204727650007173	3/29/2022 5:14:51 PM	addressList emailList phoneList webAddressList
204727650007173	Viewed	204727650007173	3/29/2022 5:14:43 PM	identifiersList
204727650007173	Viewed	204727650007173	3/29/2022 5:14:23 PM	identifiersList

## Does Alma prevent two staff users from working on the same task at the same time?

A key element of Alma workflows is the concept of assignment of tasks. This ensure that two users cannot work on the same record (such as purchase order lines) at the same time. If a record is assigned to a user, the assignment must be either released or assigned to another user in order for this user to be be able to edit the record. A record assigned to a user, will display in view-only mode for all other users. Records that have not been assigned can be opened by any user with relevant roles in edit mode. Once a user picks up the task, the record will automatically be assigned to the user.

Tasks and assignments are presented according to the user's role(s) on the personal dashboard:

41	Invoices	>
20	Electronic Resources	∨
2	Activation - assigned to you	
8	Activation - unassigned	
2	Activation - passed due date - assigned to you	
8	Activation - passed due date - unassigned	
8	Deposits	>
2	Research Deposits	>

In Alma's Metadata Editor records are locked when a user opens a bibliographic, authority or holding record - other users will not be able to edit these records.

## What data validation is run by Alma to ensure that users enter data in the correct formats?

There are many areas in Alma that validates data entry. This validation is achieved in a number of ways.

In many areas, the user is able to choose fields from system or administrator defined drop-down menus:

1...	Item is requested by another patron	Look-up or select
1...	Item renew period exceeded	Block
1...	Item cannot be loaned from this circulation desk	Override By All
1...	Item cannot be returned at this circulation desk	Override By Manager
1...	Item cannot be returned at this circulation desk	Override By Operator
1...	The loan cannot be renewed due to the loan status	Handle Automatically

Code tables control how values are sorted and which values can be selected:

	Enabled	Move Up	Move Down	Code	Description	Translation
1	<input checked="" type="checkbox"/>		▼	b	Book	Book
2	<input checked="" type="checkbox"/>	▲	▼	n	Newspaper	Newspaper
3	<input checked="" type="checkbox"/>	▲	▼	g	Online Database	Online Database
4	<input checked="" type="checkbox"/>	▲	▼	h	Microfiche	Microfiche
5	<input checked="" type="checkbox"/>	▲	▼	j	e-journals	e-journals
6	<input checked="" type="checkbox"/>	▲	▼	k	kit	kit
7	<input checked="" type="checkbox"/>	▲	▼	m	Microfilm	Microfilm
8	<input checked="" type="checkbox"/>	▲	▼	o	CD-ROM	CD-ROM
9	<input type="checkbox"/>	▲	▼	p	Periodical	Periodical

In predefined fields, users cannot type in other values than those configured by Alma or by administrators

Description	Actions
1 The loan regular due date conflicts with booking request	🔍 Not Block
2 The renew due date conflicts with booking request	

Alma will also distinguish if a value must be numeric and will display corresponding alerts with advice and flag the area of input:

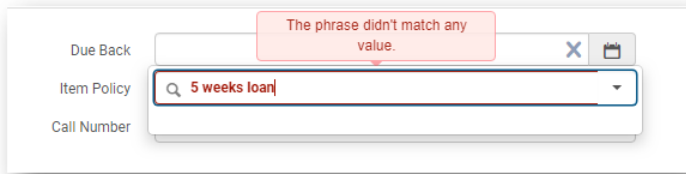
List price \*

- The field List price must contain a positive or negative number up to 14 digits with an optional decimal point
- The field List price may only contain numbers between 0 to 0.

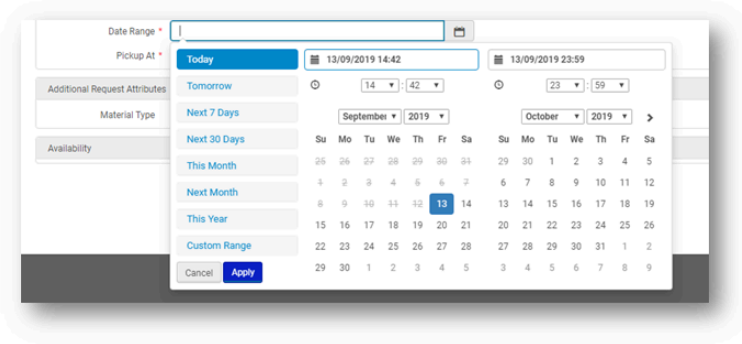
If information is missing or cannot be identified, Alma will flag this through slide-in messages:

- Item not found, you may use the 'Create Item' link.
- Item barcode field is empty

While drop-downs only accept predefined values, in some areas Alma will also prompt that the user's manual input does not match any value:



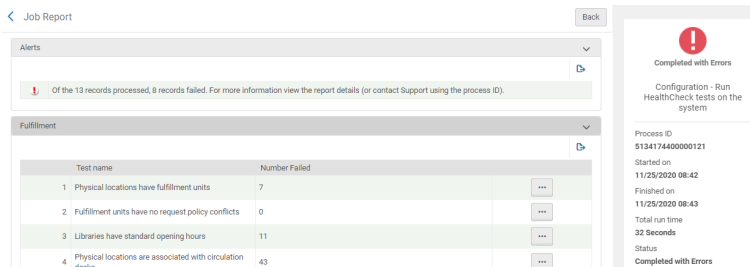
Alma works with date fields and date range fields. Dates in the past are only permitted in certain defined areas. Where the current date is the default, Alma will automatically change the date to the current date.



## What tools are available for checking errors or configuration inconsistencies?

Alma provides a HealthCheck tool that allows Alma administrators to identify whether any issues exist with their configuration, such as potential configuration inconsistencies, errors, and defined functional anomalies.

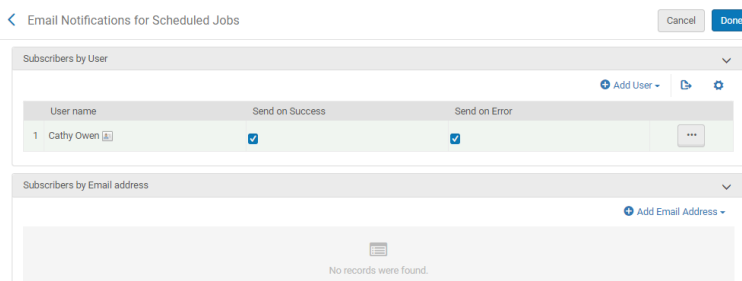
The HealthCheck dashboard can be accessed from the Admin > Advanced Tools. The following is an example of a report output detailing errors related to fulfillment configuration:



The **System Status** section lists the information of the last job run.

The HealthCheck tool can be run manually or automatically on a fixed schedule.

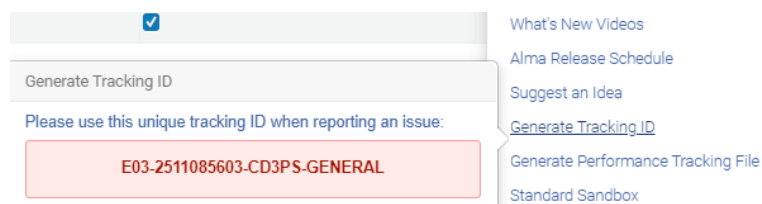
Staff users and/or external users can be emailed the output of the reports:



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## What technical error messages are supported in Alma?

In case of technical issues, the user can generate a tracking ID from the Help Menu to report the issue to Ex Libris Support:



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## What collaborative options are available in Alma?

Some areas of collaboration:

- Ability to add and edit records in the Community Zone.
- Shared vendor records (with individual library accounts defining local parameters.)
- Community reports in Analytics.
- The potential to share data for benchmarking, (currently in development).
- Community normalization rules in Resource Management.
- Sharing of applications, integrations and expertise via the Ex Libris Developer Network.
- Full two way communication in Resource Sharing (ILL) if both borrower and lender are using Alma.
- Shared global authority files.

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## Can staff view the public display (discovery tool) of a record directly from Alma?

The imbedded Primo search box – available on the Alma dashboard supports this functionality:



With Primo VE the staff user may navigate directly to Primo when viewing a record in the Alma staff search:



## MARC21 Bibliographic

Family	MARC21	Type	Bibliographic
Usage	BIB_MMS		
Tag	020	Type	Variable
Repeatable	Yes		
Mandatory	<input type="radio"/> Yes <input checked="" type="radio"/> No		
Description	<input type="text" value="INTERNATIONAL STANDARD BOOK NUMBER"/>		
Help URL	<input type="text"/>		

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## Printing

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### It is possible to allocate printers to tasks?

Printing in Alma is workflow based, and not part of a batch job that needs to be run. For example the call slips used to pick items off the shelves can be automated to print the slip to a predefined printer. The user doesn't need to run a job to print these slips. An additional example is the printout of overdue or owed fines letters. The printer these printouts are sent to are determined as part of the configuration for this process and an ongoing Alma system job prints them out without the need to define this as a parameter

In addition, staff can reprint various printouts and direct them to a specific printer, in case the original printing was not successful.

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### What printing options are available?

There are currently more than 50 types of letters that can be customized locally, including receipts, pick slips/paging slips, hold availability notices, overdue notices, and borrowing activity notices. Notices and slips can include barcodes, IDs, Item and User information.

The Configuration Files page lists all of the XML style sheets that are used to format each type of letter and determine what XML data fields display in the letter emails, print and SMS notices.

You can configure parsing routines for different call number types that are applied when printing labels. Subsequently you can use the Alma Label Printing tool to print book labels. Download the label printing tool on the Download Label Printer page.

You can add a printer to the institution or a library. If you add a printer to the institution, it is available for all the libraries within the institution as well.

Prints can be done either directly or in automatic batch routines. Automatic Printing rules allow to set parameters in which cases automatic printing rules are applied based on location and material type.

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### Are printouts and letters configurable with regard to the contents and fields?

Notices and forms can be customized at the institution level and inherited by all libraries, or customized on the library level.

Notices are generated using an XML/XSL mechanism that allows the library to fully configure the notices.

There are currently more than 50 types of letters that can be customized locally, including receipts, pick slips/paging slips,

hold availability notices, overdue notices, and borrowing activity notices.

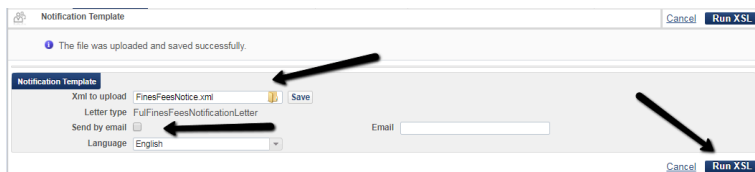
The customizations may include changes to the style (logo, colors, margins, etc.), the addition or subtraction of information (e.g. Barcodes instead of user names) sent to users or print-outs (such as print slips), and so forth. The Configuration Files page lists all of the XML style sheets that are used to format each type of letter and determine what XML data fields display in the letter emails and SMS messages. The delivery schedule of notices can also be configured.

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## Does Alma provide a preview for configuring and creating printouts?

A tool within the system allows to upload XML templates, and runs them through the XSL configuration.

The outcome is sent to a configured email address as a preview example:



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## Limits

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### What limits are there in size and number of values in data elements within records of various types?

Alma manages various types of records in the catalog, based on MARC21 (e.g., bibliographic records) using the MARCxml format. There are no limitations in managing a record and its data elements, except where mandated by the MARC standard (for example, there is only a single LDR field in a record).

Other types of records in Alma have both a fixed set of attributes and repeating, non-limited elements. For example, many records in Alma such as the user record, purchase order line, and others can have any number of notes fields or attachments.

Where a record has a fixed set of attributes (e.g., a user record has fields for their first name, middle name and last name) these fields are added by Ex Libris, based on functional and business requirements. These fields have specific sizes, which are developed as described above, based on functional and business requirements, by Ex Libris.

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## Time-out

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### Are staff timed out after a specific period of time?

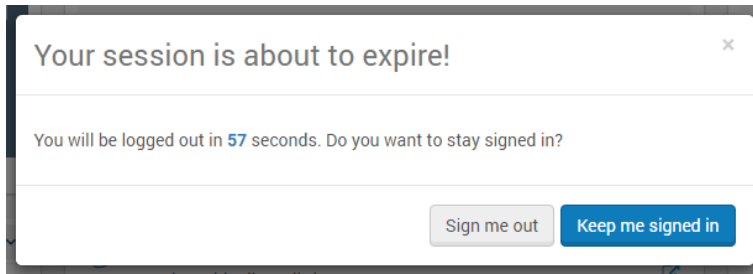
The session timeout for Alma is 60 minutes. This means that if the staff user is not working in Alma for 60 minutes, his/her session will expire and he/she will be asked to login again. This cannot currently be configured by the institution. One minute before an Alma session times out, a warning message appears on the screen. You can cancel the timeout or log out. If you do not select either option, the session times out after one minute.

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### Does Alma warn the user before a session time-out?

One minute before an Alma session times out, a warning message appears on the screen. The staff user can cancel the

time-out or choose to log out. If neither option is selected, the session times out after one minute.



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## Identifiers

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### Are all types of identifiers unique within an institution?

Alma leverages the industry-leading multi-tenancy solution based on Oracle VPD (Oracle Virtual Private Database). This means that any key in the database includes the unique institution ID, thus ensuring the separation between institutions at all levels, as well as our ability to ensure uniqueness across all institutions. Since access to the Alma database always includes the institution ID, uniqueness is delivered and maintained at all areas of the system with no limitation.

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### Are identifiers validated for uniqueness at import or creation within records

Alma automatically generates a unique ID for every bibliographic, holding and item record. This is a 15 string number, (the last three digits being the institution ID). An example of the unique ID for a bibliographic record:

<b>MMS ID</b>	<b>9951410900121</b>
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For holding records:

ID	Library	Location
226128260000121	Medical Library	Reference
226128280000121	Main Library	General
226128300000121	Education Library	Music

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## Macros, shortcuts

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### Can macros be used in Alma?

Alma can be used with macros, using the HTML IDs of Alma page elements.

Alma development uses Selenium as the web application automation tool for testing purposes. We use the HTML IDs (and xpath) for simulating users, and this can be used with macros as well.

Note that there are some limitations when using macros—for example, the MD Editor is not macro-certified.

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## Does Alma support the use of shortcut keys?

Shortcut keys are available throughout Alma in a wide variety of areas:

### **General Actions:**

F2 – Open/close the main menu navigation bar Use the right/left arrows to jump to other areas of the main menu navigation bar. Use the up/down arrows to focus on navigation links in the visible area.

Shift+F2 – Open the Alma home page

Alt+B – Click Back button

Alt+N – Click Next button

Alt+E – Click Edit button

Alt+S – Click Save button

Alt+C – Click Cancel/Close button

Ctrl+Alt+S – Open the Scanning interface

Alt+R – Open the Returns interface

Alt+P – Open the Pick From Shelf interface

Alt+W – Open the Patron Workbench

### **List Navigation:**

Alt+> (or Alt+. if . is the same key as >) – Next

Alt+< (or Alt+, if , is the same key as >) – Previous

Alt+[ – First page

Alt+] – Last page

### **Managing Patron Services:**

Alt + 1 – Opens the Loans tab

Alt + 2 – Opens the Returns tab

Alt + 3 – Opens the Requests tab

Ctrl + Alt + D – Same as clicking Done; returns to the Patron Identification page to enable searching for another patron

## Cataloguing / Metadata-Editor:

Left-to-right mark / Enter text from left to right - Ctrl + Alt + G

Right-to-left mark / Enter text from right to left - Ctrl + Alt + M

Left-to-right embedding / Embed left to right text within text being entered from right to left - Ctrl + Alt + D

Right-to-left embedding / Embed right to left text within text being entered from left to right - Ctrl + Alt + N

Pop directional formatting / Select this option to return to the previous direction in which you were typing - Ctrl + Alt + P

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## Does Alma support shortcuts and automation for repetitive tasks and processes?

Streamlining currently labor-intensive processes was one of our primary goals in designing Alma. This goal has been achieved in a number of ways:

- By providing readily available links to different areas of the system, making required data no more than one click away.
- By providing task chains. Task chains are lists of actions that are:
  - Automatically carried out when different action are activated, such as when a record is saved or deleted
  - May be manually activated, for example for correcting a record while working on it at the Metadata Editor.

Alma enables usage of hot keys, including functions where a large amount of error-prone, repetitive work is performed. This includes:

- The circulation desk patron services area
- The cataloging metadata editor area

Task-oriented macros may be implemented using Alma's Process Automation capabilities, which allow for tailoring a chain of tasks to be performed on a predefined set of data. This may include:

- Bulk moving of item records
- Normalization of bibliographic records
- Cancellation of requests

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## Is an auto-complete function available?

Alma supports auto-complete in a number of areas of the system - for example:

- Selecting patron in the Manage Patron Services
- Selecting patron in the patron request forms
- Applying funds to PO Lines

- Selecting vendors for PO Line
- Applying funds to Invoices

## Navigation

### Is it possible to navigate around a form and complete it without using a mouse?

Alma forms can be navigated and completed using standard Windows navigation functionality. (e.g. Tab, Enter keys).

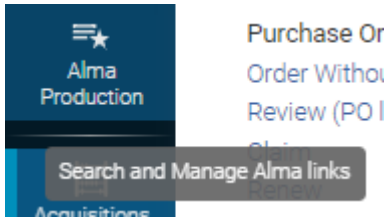
### How does the staff user navigate from one part of Alma to another?

As a next-generation solution, Alma does not have different components or modules; rather, there are several entry points for performing particular functions within the system. The following screenshot shows the Alma menu, displaying links to all of the relevant tasks and functions for each staff member available from anywhere in the system.

The screenshot displays the Alma navigation menu, which is organized into several main sections. The 'Acquisitions' section is currently selected and highlighted in blue. The menu items are as follows:

- Alma Production**
  - Purchase Order Lines
    - Order Without Inventory
    - Review (PO line)
      - Claim
      - Renew
      - Review Deferred
      - Manage Trials
      - Manage EDI Tasks
  - Post-Receiving Processing
    - Receiving Department Items
    - Scan In Items
- Acquisitions** (Selected)
  - Import
    - Manage Import Profiles
    - Import
    - Monitor and View Imports
    - Resolve Import Issues
    - Load Usage Data
    - Delete Usage Data
  - Acquisitions Infrastructure
    - ★ Vendors
    - Funds and Ledgers
    - Transfer Funds
    - Move Funds In Hierarchy
    - Licenses
    - License Template
- Resources**
  - Purchase Order (PO)
    - Package
    - Review (PO)
      - Approve
      - Delete PO
  - Purchase Requests
    - Create Purchase Request
    - Manage Purchase Requests
    - Check Availability and Pricing
  - Receiving and Invoicing
    - Receive
    - Create Invoice
    - Review (Invoice)
      - Approve (Invoice)
      - Waiting for Payment
- Fulfillment**
  - Advanced Tools
    - Exchange Rates Report
    - Rollover Ledgers
    - Rollover PO Lines
    - Rollover Resource Sharing Requests
    - Patron Driven Acquisition (PDA)
    - Change Vendor In Order
- Admin**
- Analytics**

Quick links can be created by clicking on the star next to a function. You can then customize and manage these Quick Links from the 'Search and manage Alma' links at the top of the menu:



## Ease of use

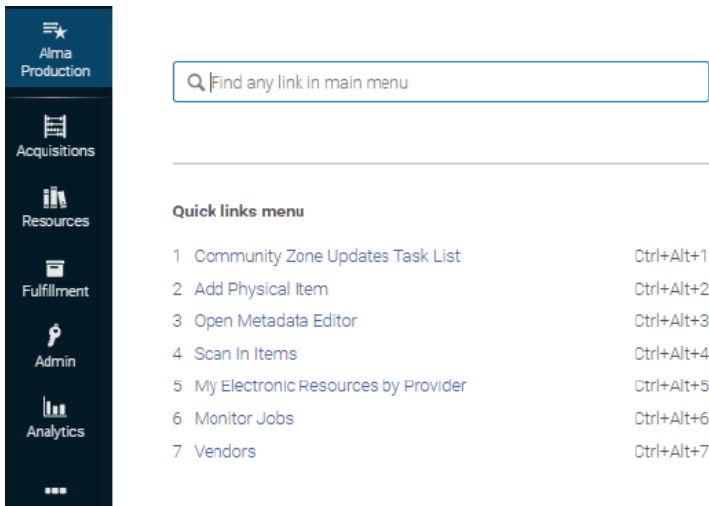
### How does Alma support quick access to data?

Alma utilizes textual elements, links, tabs, icons, buttons and fields for quick access to data.

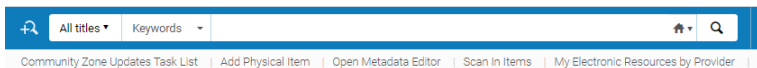
The landing page/dashboard allows to quickly navigate the recent menus used:



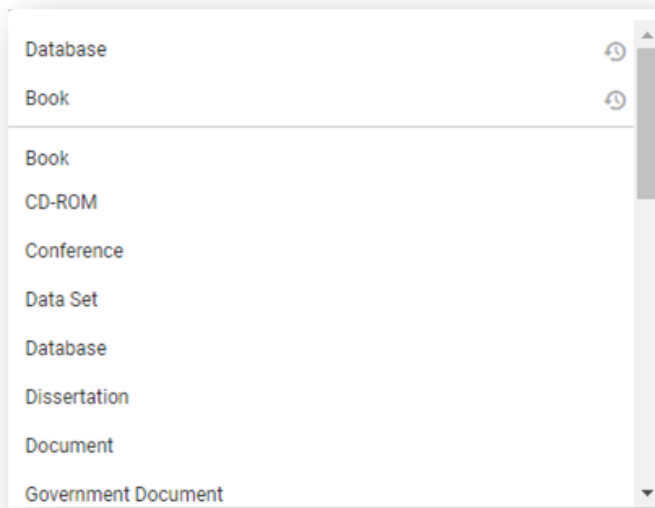
Favorite menus can be 'quick linked' (bookmarked) and can then easily be accessed from the Alma Links menu:



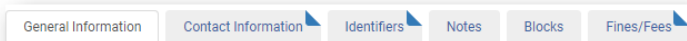
These links can also be pinned to the top of the screen:



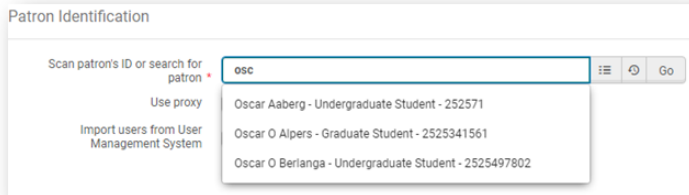
Within drop-down menus Alma shows recently used values, to allow staff to quickly find preferred selections:



Within tab views users can quickly see indication which tabs have content through the blue folded page corner:



Alma's design is based on avoiding navigation to other pages when selection of vendors, items, users, licenses, etc. can be achieved through live searching while the user is typing in the first characters:



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## What options does Alma offer for streamlining labor intensive tasks?

Streamlining currently labor-intensive processes was one of our primary goals in designing Alma. This goal has been achieved in a number of ways:

- By providing readily available links to different areas of the system, making required data no more than one click away.
- By providing task chains. Task chains are lists of actions that are:
  - Automatically carried out when different action are activated, such as when a record is saved or deleted
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Alma enables usage of hot keys, including functions where a large amount of error-prone, repetitive work is performed. This includes:

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- Cancellation of requests

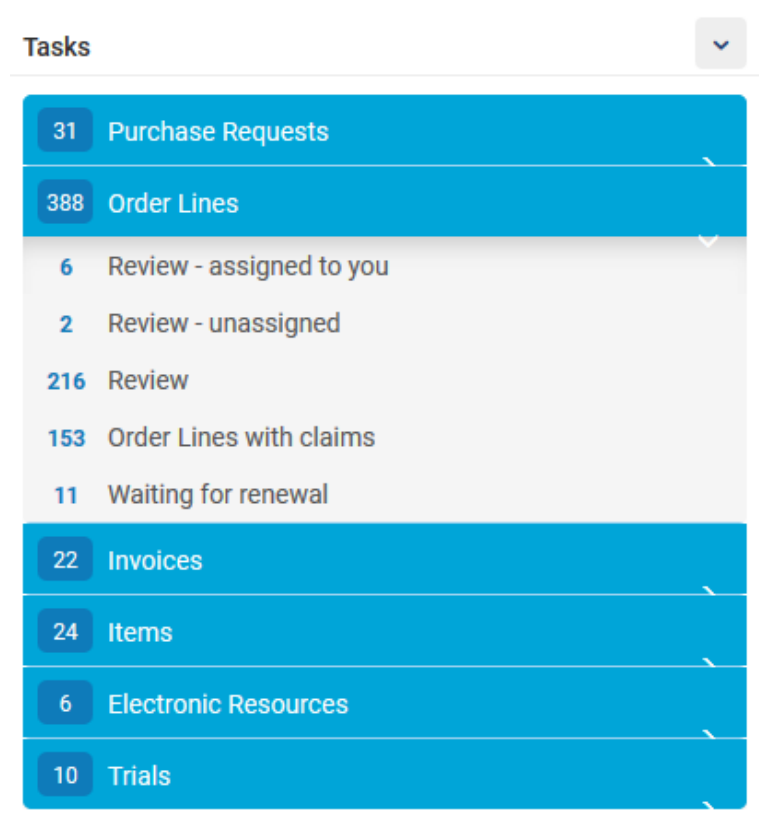
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## Does Alma allow for a multi-tasking environment?

The Alma Task List provides the staff user with information about tasks that need their attention.

The Task List is part of the persistent menu bar of Alma and therefore available from any page.

The Task List has hypertext links for easy navigation to areas of the system where records require manual intervention. The Task List is sensitive to the user's roles and privileges so that only acquisitions staff will see ordering and invoice-related tasks.



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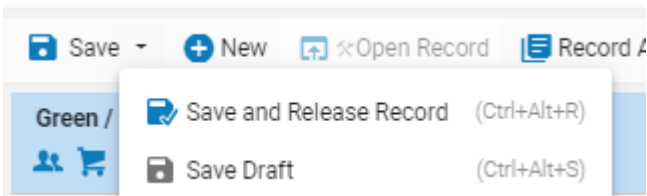
## Can a workflow be saved at any time without losing data?

Throughout Alma there are places where records can be saved "mid-way" through a process to make sure changes are not lost.

For example it is possible to 'save' an order before sending it to the vendor.

- Q Look-up or select
- Save and continue
- Save
- Order Now
- Defer
- Relink
- Cancel line
- Delete
- Change Bib Reference
- Save as template

Similarly, a metadata record can be saved as a draft before saving to the repository (catalog).



Electronic resources can be edited in many stages until they are activated and “done”.

MMS ID	Title	Type	Status	Status Date	Modified By	Identifier	Due Date	Expected Activati Date	PG Line Owner	Order Line	Notk	
1	99107511300121	Gale Cengage 19th Century British Library Newspapers	Aggreg... package	Check Access	01/19/2017	System	-	01/29/2017	01/2...	Main Library	POL-44432	...
2	99107611300121	Gale Cengage Insurance and Liability Collection	Aggreg... package	Check Access	01/23/2017	System	-	03/14/2017	01/2...	Main Library	PC	View Edit Edit Resource Test Access Activate Unsuppress Assign to Release assignment Done

Functions where manual intervention might be required (e.g. invoices, purchase orders, item records, etc.) can be saved in draft format.

## Customization, personalization

### Can the staff user personalize the Alma interface?

Alma provides a state-of-the-art dashboard that the staff user can configure and customize according to his/her roles. Widgets that the user (based on his role) can select for display on the dashboard are created in Alma Analytics. The pre-defined reports are shown by default to the user (role-based). For example: if the user's role is Acquisitions Administrator, (s)he will be able to see expenditure trends during the last year. The user can arrange the reports and define which of them (s)he would like to see as part of the personalized dashboard. Below is an example of a circulation staff user's personalized dashboard, displaying the user's task list and relevant analytics. The user may add widgets as needed.

## Manage Widgets

Active	Widget name	Description
<input checked="" type="checkbox"/>	Tasks	Tasks Widget
<input type="checkbox"/>	Notifications	Notifications Widget
<input type="checkbox"/>	Organization Calendar	Calendar Widget
<input checked="" type="checkbox"/>	Scheduled Jobs Status	The Scheduled Jobs Status Dashboard widget presents the status of scheduled jobs for the last 5 days
<input type="checkbox"/>	Primo Dashboard	Primo Dashboard Widget

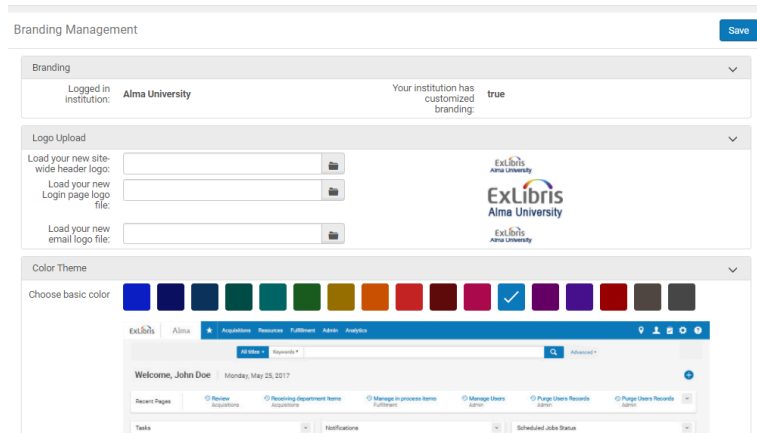
## Does Alma support interface languages other than English?

Alma supports a number of interface languages including German, French, Spanish, Italian, Korean, and Chinese. Some examples follow:

## What branding options are available for Alma?

Alma enables you to define a header logo, email logo, and/or login page logo for your institution. You can also change the default blue in the user interface to a different color. To configure Alma branding, you must have the General System Administrator role.

These elements are configured on the Branding Management page:

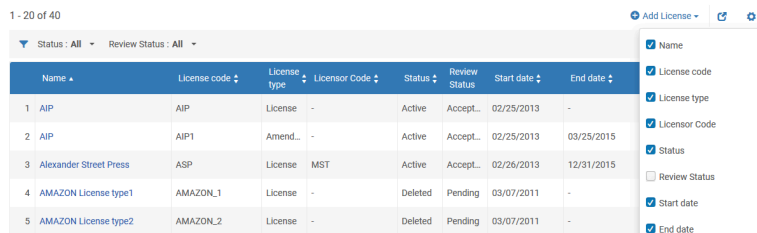


## How can Alma be customized?

As a fully web based solution, Alma provides certain level of customizations for the user interface. The Alma web page color scheme can be customized as well as the Alma dashboard with customization of widget view. Alma also supports the ability to customize the search results table columns by changing columns location. The size of the fonts can be controlled by using the browsers zoom in/out functionality.

Throughout Alma list tables can be greatly customized. Some examples:

### Hide and display columns



Name	License code	License type	Licensor Code	Status	Review Status	Start date	End date
1 AIP	AIP	License	-	Active	Accept...	02/25/2013	-
2 AIP	AIP1	Amend...	-	Active	Accept...	02/25/2013	03/25/2015
3 Alexander Street Press	ASP	License	MST	Active	Accept...	02/26/2013	12/31/2015
4 AMAZON License type1	AMAZON_1	License	-	Deleted	Pending	03/07/2011	-
5 AMAZON License type2	AMAZON_2	License	-	Deleted	Pending	03/07/2011	-

### Changing the display on result screens:



1  **Becoming Slav, Becoming Croat [electronic resource] : Identity Transformations in Medieval Dalmatia** [Edit](#)

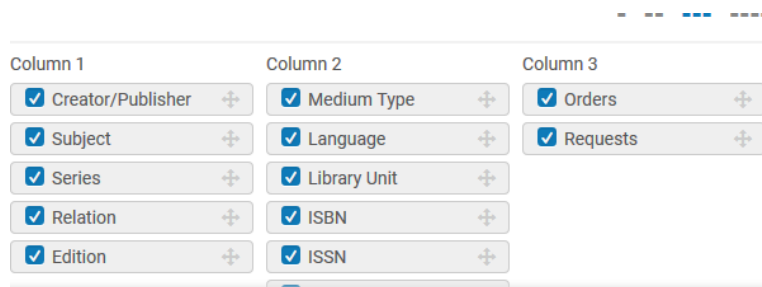
**BK (Book - Electronic)** By Dzino, Danijel. (Leiden : BRILL, 2010.)

**Subject:** Croatia - History - To 1102. Croatia - History - To 1102. Croats - Ethnic identity - History - To 1500. and others

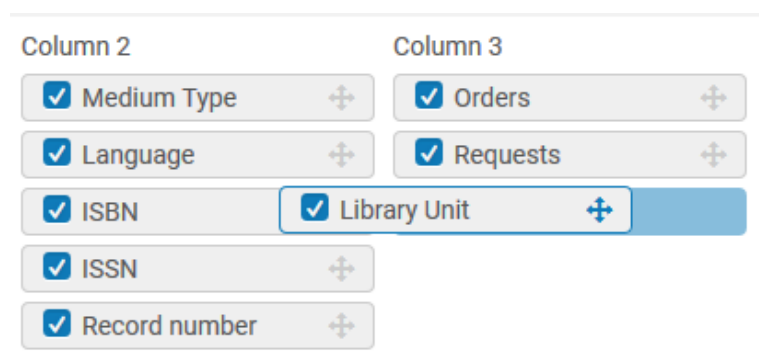
**Series:** East Central and Eastern Europe in the Middle Ages, 450-1450

**Medium Type:** [electronic resource] :  
**Language:** English  
**ISBN:** 90-04-18646-8 and others  
**Record number:** (CKB)2670000000046127

Physical ● **Electronic (1)** Digital [Other details](#)



Drag and drop options for moving fields from one column to another:



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

## Ease of management

### Is Alma easy to manage for small libraries but with flexible options for large libraries?

Moving to the cloud lowers the required threshold for entry to basic management processes. In today's systems, many mission-critical workflows require server access. The staffing requirements for basic management processes such as record loading or integrating data from other campus systems must be managed by a system administrator. Since Alma provides user-friendly and highly efficient interfaces for all tasks, the system expertise needed to manage the system is significantly reduced. Both Alma and Primo are hosted by Ex Libris and no local database expertise or maintenance is required.

Configuration and profiling are done easily via a set of configuration rules per each process (e.g., acquisition, resource management). The system-managed workflows automate many currently manual processes, reduce error, and free staff to work on those tasks that require decision making.

Alma's basic design is based on two organizational levels, the Institution and the Library:

1. **The Institution** is the basic level of data and workflow management in Alma; it also holds all of the institution, or local library, data. Some processes and configurations, however, may be managed at the Library level.
2. **The Library** is one or more physical locations that are normally housed in a single building or in several buildings that are in close proximity to one another. It has locations and circulation desks that are familiar to the library patrons.

An institution manages the following, accessible to all institution operators with the proper role:

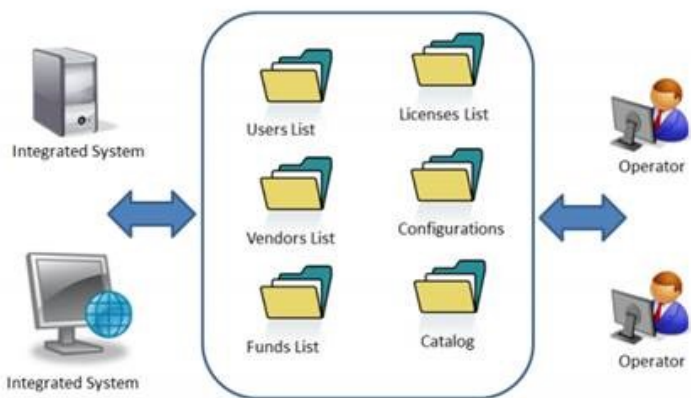
- User management

- Vendors
- Funds management
- Licenses
- Metadata management
- Configurations

In addition, an institution can make use of single

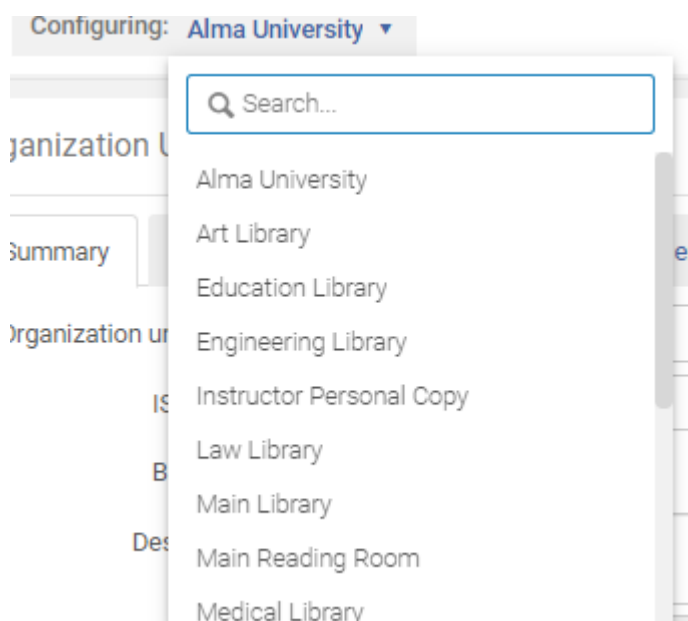
- Integrated external systems such as ERP or SIS

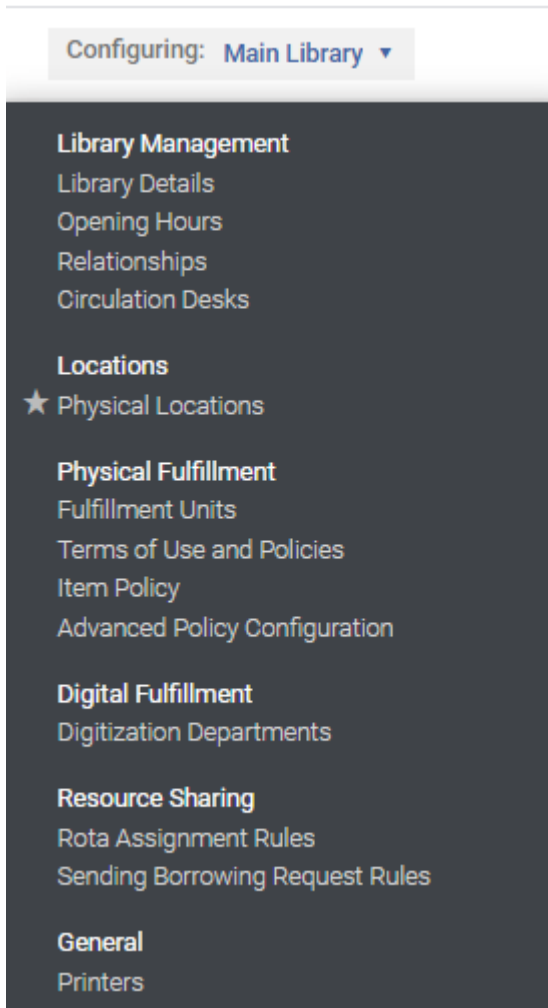
This is illustrated below:



Alma is pre-configured with all batch jobs required for operation of the system. One needs only to decide to opt in or opt out of a scheduled job. This makes the configuration very easy to manage.

The following screen capture shows the configuration areas, each of which includes configuration options that can be defined at the institution or library level.



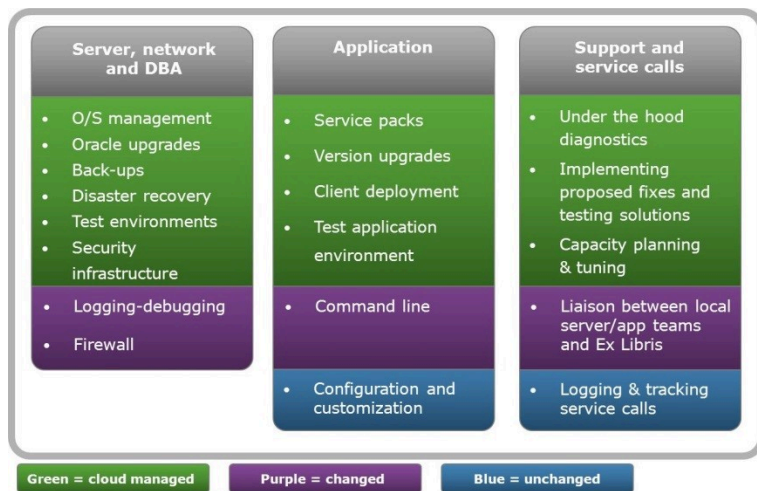


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## What is the expected level of local systems staffing required for managing Alma?

Providing Alma as a cloud-based SaaS solution eliminates significant aspects of the work done typically by system administrators and DBA staff on systems installed on site. Local operations in Alma are primarily concerned with the administration of users and the configuration of local workflows. Both can be done centrally by the consortium.

The table below summarizes all areas that are traditionally managed by local staff. Marked in **green** are areas that are performed by Ex Libris, and the **purple** areas are tasks that performed by the customer's staff. Local tasks include setting firewall rules (to allow access to Alma cloud via a standard web port) or command lines that are no longer relevant with Alma since access is done via the application or through a dedicated API and web-services.



As illustrated in the diagram, configuration and customization (in **blue**) are performed at the institution level, while Alma is delivered with settings that allow for faster time to production. Customers report and track service calls through the Ex Libris CRM system, with the benefit of 24x7 monitoring and the hub team.

Alma provides a flexible environment that will allow the institution to maintain many tasks centrally, including integration development, customization, and purchasing. The library/consortia may also distribute all or part of such tasks, and work as a unified system across all members.

Thanks to Alma's flexibility, the library may choose to take several roles in Alma's ongoing operation such as:

- Help desk type support – functioning as Alma experts in resolving tier one issues that are primarily issues related to 'know-how';
- Troubleshooting for application issues – such as configuration issues;
- Integration development using Alma's API and web-services;
- Provide expert services to the rest of the members in a consortial environment in areas such as advanced reporting and analytics, integrations and customizations;
- Managing users and staff accounts; and
- Provide customized training to its staff and/or consortia members.

While Alma's architecture and support model allows for the above roles system administration is flexible and can be done by local system librarians, Ex Libris, or in cooperation with Ex Libris.

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## Alma should be easy for staff to learn and use

Alma unifies the management of print, electronic and digital resources, supporting automatic, exception-based workflows for the complete lifecycle management of all of the resources managed in the library. Rather than integrating a range of existing, disparate services, Alma was designed to break down the traditional silos among formats and functions to create efficiencies that reduce the library's cost of ownership and free library staff to perform the important activities that solidify the library's role in the larger institution.

Unlike legacy function-oriented library systems, Alma is task-oriented and focuses on streamlining workflows for library staff. Common tasks are fully automated, from metadata management to ordering and invoicing and more. As a result, staff deal only with the exceptions, which are surfaced as tasks, based upon staff role or roles within the library.

