

Menu Changes in Alma's New UI

Dropdown Menus

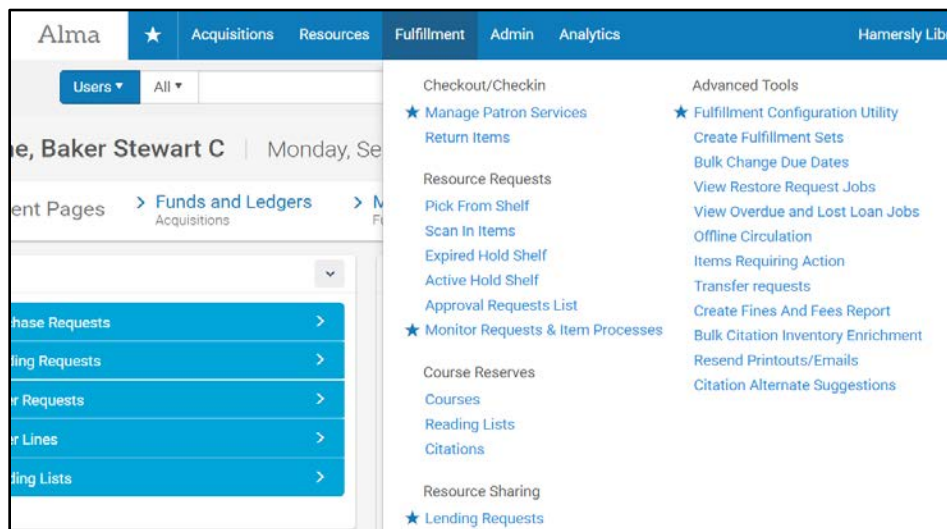
One of the biggest differences in Alma's new UI is that each functional area now has its own dropdown menu.

Previously, options for each functional area were available under the "Alma" button at the top of every screen, separated into columns.

The screenshot displays the Alma library system interface. At the top, there is a navigation bar with the Alma logo, a search bar, and tabs for "Tasks" and "Analytics". The current location is "Currently at: Hamersly Library - Circulat...". Below the navigation bar, there is a "Back to Home Page" link. The main content area is divided into four columns, each representing a functional area with a dropdown menu:

- ACQUISITIONS**
 - Purchase Order Lines**
 - Search for PO Line
 - Order Without Inventory
 - Review
 - Claim
 - Renew
 - Review Deferred
 - Manage Trials
 - Manage EDI Tasks
 - Purchase Order**
 - Package
 - Review
 - Approve
 - Delete PO
 - Purchase Requests**
 - Create Purchase Request
 - Manage Purchase Requests
 - Receiving and Invoicing**
 - Search for Invoice
 - Receive
 - Create Invoice
 - Review
 - Approve
 - Waiting for Payment
 - Post-Receiving Processing**
 - Receiving Department Items
 - Scan In Items
 - Import**
 - Import
 - Monitor and View Imports
 - Resolve Import Issues
 - Acquisitions Infrastructure**
 - Vendors
 - Funds and Ledgers
 - Transfer Funds
 - Move Funds In Hierarchy
- RESOURCE MANAGEMENT**
 - Search**
 - Repository Search
 - Manage Exports
 - Manage Collections
 - Cataloging**
 - Search External Resources
 - Browse Bibliographic Headings
 - Browse Shelf Listing
 - Open Metadata Editor
 - Authority Control Task List
 - Reminders
 - Create Inventory**
 - Add Local Electronic Collection
 - Add Local Portfolio
 - Manage Inventory**
 - Community Zone Updates Task List
 - Manage Electronic Resource Activation
 - Network Harvesting Report List
 - Shelf Report
 - Import**
 - Import
 - Upload Single Record From File
 - Monitor and View Imports
 - Resolve Import Issues
 - Advanced Tools**
 - Overlap and Collection Analysis
 - Duplicate Title Analysis
 - Resource Configuration**
 - Configuration Menu
- FULFILLMENT**
 - Checkout/Checkin**
 - Manage Patron Services
 - Return Items
 - Resource Requests**
 - Pick From Shelf
 - Scan In Items
 - Expired Hold Shelf
 - Active Hold Shelf
 - Approve Digitization Requests
 - Monitor Requests & Item Processes
 - Course Reserves**
 - Courses
 - Reading Lists
 - Citations
 - Resource Sharing**
 - Lending Requests
 - Borrowing Requests
 - Receiving Items
 - Shipping Items
 - Partners
 - Rota Templates
 - Advanced Tools**
 - Fulfillment Configuration Utility
 - Create Fulfillment Sets
 - Bulk Change Due Dates
 - View Restore Request Jobs
 - View Overdue and Lost Loan Jobs
 - Offline Circulation
 - Items Requiring Action
 - Transfer requests
 - Create Fines And Fees Report
 - Bulk Citation Inventory Enrichment
 - Resend Printouts/Emails
 - Citation Alternate Suggestions
 - Fulfillment Configuration**
 - Configuration Menu
- ADMINISTRATION**
 - User Management**
 - Find and Manage Users
 - Purge User Records
 - Load Desk/Department Operators
 - Bulk Fine Waiving
 - User Identifier Types
 - User Management Configuration**
 - Configuration Menu
 - General Configuration**
 - Configuration Menu
 - Advanced Tools**
 - HealthCheck Dashboard
 - Analytics**
 - Design Analytics
 - Configuration Menu
 - Subscribe to Analytics
 - Manage Jobs and Sets**
 - Run a Job
 - Monitor Jobs
 - Manage Sets
 - Restore Jobs

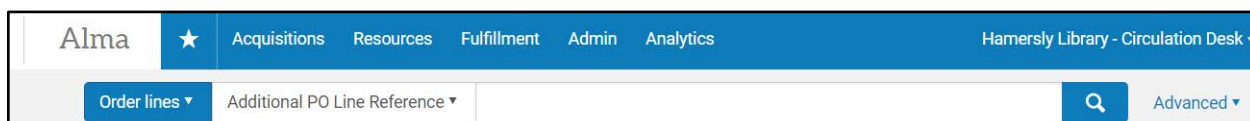
In the new UI, the Alma label is no longer clickable, and each functional area has its own dropdown menu:



In most cases, the menus under each dropdown are identical to the old UI's columns. However, some menus have changed slightly.

Acquisitions

Search PO Lines is no longer a clickable link. Instead, use the embedded search bar beneath the dropdown menus:



Search for Invoices is no longer a clickable link. Again, this is now in the embedded search bar beneath the dropdown menus.

Manage Import Profiles has been added to the "Import" sub-menu. Previously, this item was only available in the configuration screen.

Resources

The menu has been renamed from "Resource Management."

The search submenu has been removed. You can search the repository using the embedded search bar.

Manage Exports has been moved to the "Admin" menu.

Manage Collections now appears under the “Manage Inventory” submenu.

Manage Import Profiles has been added to the “Import” submenu. Previously, this item was only available in the configuration screen.

Manage deleted repository and **Restore Jobs** have been added under the “Advanced Tools” submenu.

Fulfillment

Approve Digitization Requests has been renamed Approval Requests List.

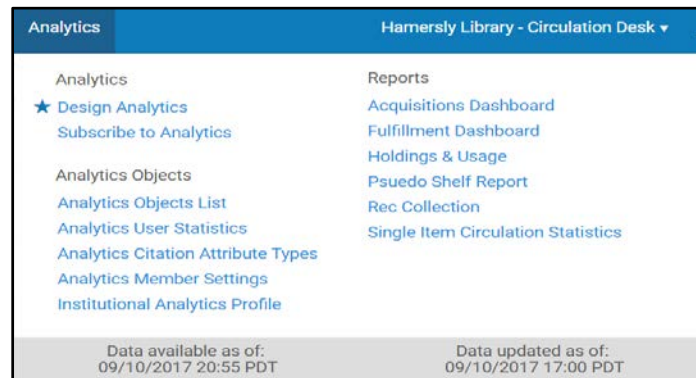
Administration

The administration menu has been split, with analytics items now appearing under the **Analytics** menu, while user management and set/jobs management appearing under the **Admin** menu.

Restore Jobs has been moved to the “Resources” menu.

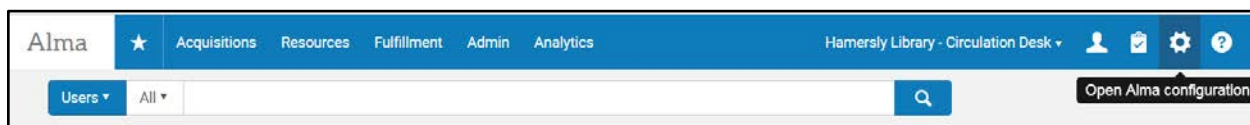
Analytics

The analytics menu in the old UI displayed any reports which had been added to the objects list. In the New UI, it also contains configuration options for the objects list and the links into Oracle BIEE to design new analyses and dashboards:

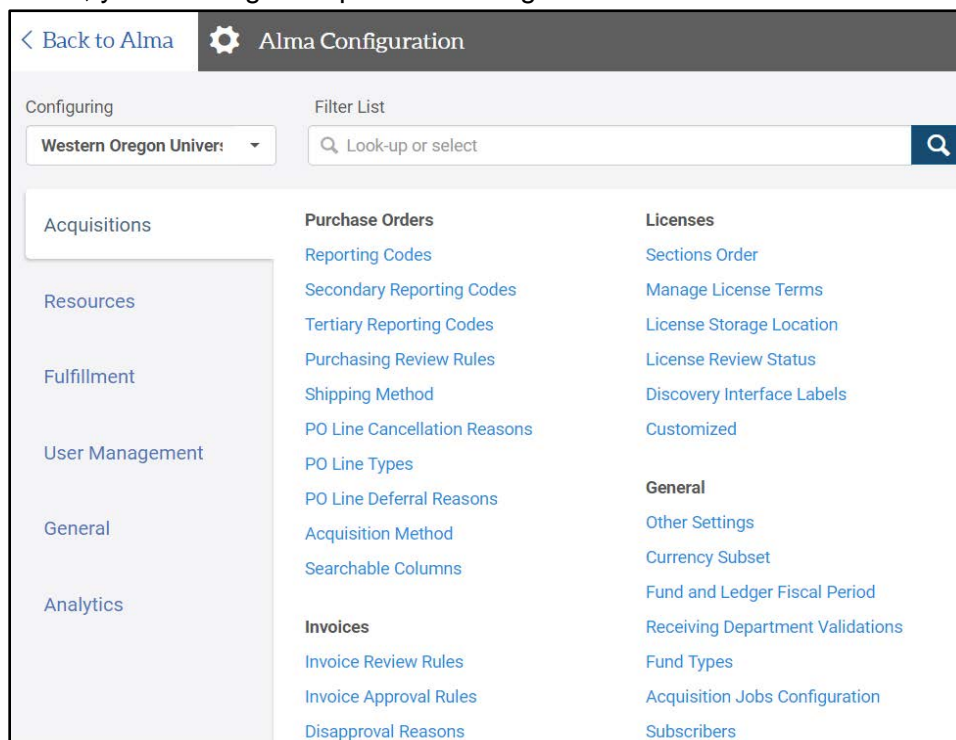


Configuration Menus

Previously, configuration menus were also located in the functional area columns. To access configuration menus in the new UI, you must now click the “Open Alma Configuration” button, a small gear located at the top right:



From this screen, you will be given options to configure each functional area:



In **almost all cases**, the functional area for the configuration options are the same in the old and new UIs. (e.g. “reporting codes” can still be found under Acquisitions on the configuration screen).

However, a few configuration options have changed locations:

Menu option	Old UI location	New UI location	Notes
Publishing Profiles	Resource Management Configuration > Record Export	Resources Menu > Publishing	
Import Profiles	Resource Management Configuration > Record Import	Resources Menu > Import	Renamed "Manage Import Profiles"
Import Profiles	Acquisition Configuration > Purchase Orders	Acquisitions Menu > Import	Renamed "Manage Import Profiles"

Analytics options now have their own configuration screen.

To jump straight to a known configuration menu link, you can also use the “Filter List” search bar instead of clicking into the functional area.

The screenshot shows the Alma Configuration interface. At the top left is a link for '< Back to Alma'. To its right is a dark header bar with a gear icon and the text 'Alma Configuration'. Below this, there are two main sections. On the left, under the heading 'Configuring', there is a dropdown menu currently set to 'Barber Library'. Below this is a sidebar with two items: 'Fulfillment (1)' and 'General'. On the right, under the heading 'Filter List', there is a search input field containing the text 'hours'. To the right of the input field are an 'X' icon to clear the search and a magnifying glass icon to execute the search. Below the search bar, the results are displayed under the heading 'Library Management', with a single result 'Opening Hours' listed in blue text.

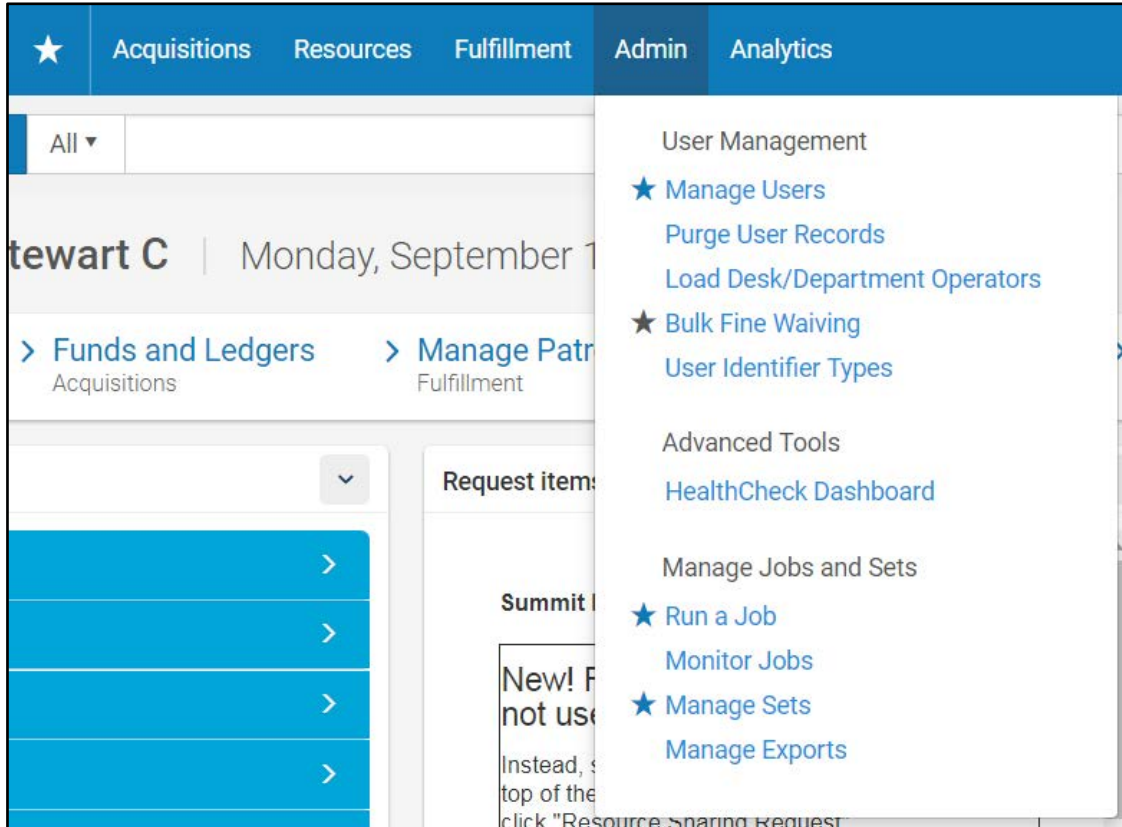
However, note that the current location selected for configuration affects which links appear in the filtered results. Some links will be returned only at the institution level and others only at the library level.

This screenshot shows the same Alma Configuration interface as the previous one, but with a different search term. The search input field under 'Filter List' now contains 'display logic'. The sidebar on the left is now expanded to show 'Fulfillment' and 'General'. The search results area, which previously showed 'Opening Hours', now displays the message 'No matches were found.' in grey text.

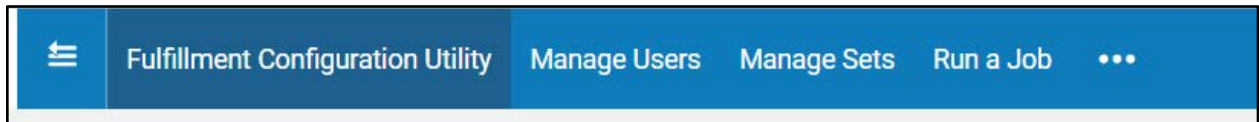
Quick Links Menu

Another new option in Alma's New UI is the "Quick Links" menu, hidden behind the star.

This menu is configurable by each user. To add items to it, open a menu and hover the mouse to the left of a menu option until a dark grey star appears:



Once you click the star, it will turn blue and the menu item will appear on the quick links menu:



The menu will display the first four or five items starred (depending on character length), with the remainder appearing behind the ellipsis (...) link.