Mobility
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Introduction to Alma Mobile

Alma Mobile provides portability of Alma functions that align with your workflows using mobile phones and tablets. For example, Alma Mobile enables you to process Pick Up from Shelf (Fulfillment > Resource Requests > Pick from Shelf) requests directly from your mobile device. The sections below provide the following information to help you get started:

- Supported Operating Systems
- Supported Devices
- Supported Barcode Symbologies
- Getting Started and Logging In
- Working with Settings
- Logging Out of Alma

Download the Alma Mobile app from:

- Google Play
- Apple App Store

The licensing information for the Alma Mobile app can be found at Alma Mobile EULA and Alma Mobile App.

Supported Operating Systems

Alma Mobile supports the following device operating systems:

- Android
- iOS (11 or later)

Supported Devices

Alma Mobile supports the following mobile devices:

- iPhones
- iPads
- Android cell phones
- Android tablets
- Bluetooth-enabled, hand-held scanners

Supported Barcode Symbologies

The operating system barcode symbologies identified below are supported when using the mobile device's camera to scan in barcodes. If you are using a bluetooth-enabled scanner connected to your mobile device to scan in barcodes, you will need to check which barcode symbologies are supported for that scanner.
For devices using the Android operating system, the following barcode symbologies are supported when using the device’s camera:

- QR_CODE
- DATA_MATRIX
- UPC_E
- UPC_A
- EAN_8
- EAN_13
- CODE_128
- CODE_39 (see the note below)
- CODE_93
- CODABAR
- ITF
- RSS14
- RSS_EXPANDED

For devices using the iOS operating system, the following barcode symbologies are supported when using the device’s camera:

- QR_CODE
- DATA_MATRIX
- UPC_E
- UPC_A
- EAN_8
- EAN_13
- CODE_128
- CODE_39 (see the note below)
- ITF

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**Note**

For sites with barcodes that use extended ASCII characters (such as >, the greater than symbol) that require Extended Code 39 symbology support, it is recommended that you use a bluetooth-enabled scanner connected to your mobile device that supports that symbology.

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**Getting Started and Logging In**

To get started:

1. Using the Apple App Store or Google Play, download the Alma Mobile app.
2. Locate the Alma Mobile icon on your mobile device and start the app.
The Getting Started pages appear.

These pages appear in the language identified as the default language in the mobile device's language setting when the language is one that is supported by Alma. Separately, you need to use your Alma Mobile settings to identify the language to be used while working with Alma on your mobile device. See Working with Settings for more information.
Welcome!
Before you get started using Alma Mobile we just need a few pieces of information to connect to your Alma account.

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Ex Libris Alma
Using Alma Mobile

1. For the next screen, have your Environment URL ready; it is the same as your Alma instance.

   Example:
   * alma.demo/login?Institution=INST_CODE
   * alma.demo/login?Institution=INST_CODE

2. Choose your authentication method.

3. Tap save.
3. Tap **Start app**. The URL / Authentication configuration page appears.

**Note**

This page will appear in English.
4. Enter your institution URL as described in the Getting Started pages. This is your Alma instance as in the following generic format where `mng` is replaced with `mobile`:

   https://<hostname:port>/mobile/login?institute=<institution_code>

5. Open the **Authentication Method** drop-down list and select one of the following:
   - Local - With this option, authentication is handled by Alma.
   - SAML - This option uses the Security Assertion Markup Language, XML-based format, for processing authentication.
   - CAS - This option uses the Central Authentication Service for handling authentication.
   - Social Login - This option uses a social networking service such as Facebook, Twitter, or Google+ for authentication.

6. Tap **Save**. The Alma log-in page appears.

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**Note**

This log-in page will appear in English.
7. Enter your Alma log-in user name and password. The Alma Mobile options appear.
For more information regarding working with the Alma Mobile options, see:

- Using Pick Up from Shelf
- Using Scan In

Working with Settings

Alma Mobile provides settings for:

- Languages
- External Links

To work with Alma Mobile settings:

1. Tap the gear icon to open the Settings pane.

2. Tap **Languages** to display and/or select the preferred language option for the Alma Mobile user interface. The sorted list of language setting options will be updated over time and as additional languages are supported by Alma.
Language Settings for the User Interface

3. Tap **External Links** to conveniently switch from Alma Mobile to one of the following external links:

- Ex Libris Ideas
- Ex Libris Facebook
- Ex Libris Twitter
4. Tap the gear icon to close the Settings pane.

Logging Out of Alma Mobile

The Settings menu in Alma Mobile provides a Logout action to log out of Alma Mobile.

To log out of Alma Mobile:

1. Tap the gear icon to open the Settings pane.
2. Tap the Logout action.
A confirmation of your Logout action appears.

Tapping the Login button will take you back to the Login page (see Getting Started and Logging In).
Using Pick Up from Shelf

Alma Mobile Pick Up from Shelf enables you to process holdings requests easily from your mobile device and without the need for printing lists to take to the shelves with you.

Working with Pick Up from Shelf

To work with Pick Up from Shelf, you need to have the same role as you do when you are logged in to Alma without your mobile device:

- Requests Operator

**To work with Pick Up from Shelf:**

1. After you have logged in to the Alma Mobile app, select your location for processing pick-up requests.
   - Tap the teardrop icon.

   ![Teardrop Locations Icon](image)

   The **Currently at** page opens.
Open the Location drop-down list.
Location Drop-Down List

- Tap the location for which you will be processing pickup requests. The **Currently at** location that you selected appears at the bottom of the page.
2. On the home page, tap the Pick Up from Shelf icon. The Pick Up from Shelf page appears.
For long lists, scroll up from the bottom to view more information.

3. If the Pick Up from Shelf list of requests is exceptionally long, filter the list to shorten it.

1. Tap **Filter Results**. The Filter Results pane appears.

2. Tap one or more of the following options, and enter your filtering criteria:
- Request Date
- Request Type
- Location
- Call Number
- Destination
- Material Type

3. If you choose not to use the filters, tap outside the Filter Results pane to return to your list.

4. If you change your mind about using a filter that you’ve selected, swipe the filter from right to left and tap Remove.

4. If you want to view More Info such as Edition, Volume or Issue, tap the gear icon to turn on the More Info setting.

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**Note**

Depending on your page location, the gear icon may present different options.

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After you have selected the More Info setting, the items in the Pick Up from Shelf list display any additional More Info data that is available.

More Info Setting

After you have selected the More Info setting, the items in the Pick Up from Shelf list display any additional More Info data that is available.

More Info Data Appears

5. In any item row swipe from right to left to display the Print Slip and More actions.

When you tap More, the following options appear:

- Cancel request
- Mark as missing
- Convert to resource sharing

Similar to the web-based version of Alma, **Skip Location** may optionally appear in the list of options when the requested item can be obtained from another location.
Skip Location in the Task List

When you tap **Skip Location**, you are prompted with a confirmation message.
After the Skip Location request has been processed successfully, it no longer appears in the list from which you are working. Similar to the web-based version, the request is deactivated from the current location and will be attempted to be fulfilled by another location. It will appear in the Pick Up From Shelf request list for the other location.

6. After you locate an item in your list on the shelf, tap Scan In to enter the barcode of the item and complete processing of this request.
From the Pick Up from Shelf page, Scan In is a toggle button that easily allows you to switch between the Scan In feature and the Pick Up from Shelf list.
Pick Up from Shelf Toggle Button

See Working with Scan In for more information and to complete processing of the Pick Up from Shelf items.

Working with Scan In

See Working with Scan In for more information and to complete the processing of the Pick Up from Shelf items.

Working with Alma Mobile Settings

See Working with Settings for information about customizing your Alma Mobile settings.
Using Scan In

The Scan In feature in Alma Mobile enables you to enter barcode information in one of the following ways:

• Use the camera feature on your mobile device
• Use a bluetooth-enabled, hand-held scanner that you have paired with your mobile device
• Enter the barcode manually

After configuring your Scan In settings, you can:

• Automatically have the system generate print slips for the items in your Pick Up from Shelf list (see Using Pick Up from Shelf for more information)
• Identify items used in-house
• Display more information for scanned items
• Restore an item to its permanent location from a temporary location and check for requests

Your configuration settings can be easily changed to dynamically meet the requirements that you have for the items that you are processing.

Configuring Scan In Settings

Scan In Settings provide the following options:

• Scan In Items

  ◦ Automatically print slip - When you scan the barcode, Alma creates a print slip automatically. This is commonly used with the Pick Up from Shelf capability on your mobile device.
  ◦ Register in-house use - Use this setting to identify items that have been browsed within the library when you scan the item's barcode.
  ◦ More Info - Select this setting to display the request information about the scanned items that appear in the Scan-In page list.

• Restore

  ◦ Check Requests - Use this option to check for requests when you restore an item to its permanent location.

To configure Scan In settings:

1. After you have logged in to the Alma Mobile app, tap the Scan In icon. The Scan In page appears.
2. Tap the gear icon. The Scan In Settings pane appears.
3. Slide to turn on one or more of the following:

- **Automatically print slip**
- **Register in-house use**
- **More Info**
- **Place on hold shelf**

**Place on hold shelf**

Similar to the Yes/No options for **Place directly on hold shelf** in the web-based version of Alma, turning on the **Place on hold shelf** option in Alma Mobile places the item on the hold shelf when scanned and a letter is sent to the patron indicating that the item is ready for pick up.

Turning off the **Place on hold shelf** option in Alma Mobile identifies the item for on hold shelf processing. After the hold shelf processing is complete, the item needs to be scanned again to be placed on the hold shelf (with the appropriate options selected).

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**Note**

The **Place on hold shelf** option in Alma Mobile is only presented when the circulation desk from which you are processing items is configured in the web-based version for **Has hold shelf processing**. The **Place on hold shelf** option applies to both the Scan In Items and the Restore functionality.

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- **Check Requests**

4. When you are finished, tap the gear icon or anywhere outside the Scan In Settings pane to return to the Scan In page.
Working with Scan In

With the Alma Mobile Scan In feature, you can scan (or enter) item barcodes and perform actions on the items that you have scanned into the Scan In list.

To work with the Scan In feature:

1. Select the **Scan In** tab.

   ![Scan In Tab](image)

   **Scan In Tab**

2. Scan a barcode.

   When you scan a barcode, the system automatically checks the database for the barcode and displays the item details that it finds or identifies the barcode as Not Found.

   **Note**

   If you manually enter a barcode, you need to tap **Search** to have the system check the database for the barcode.

   1. Make the barcode field the focal point.
   2. Use a bluetooth-enabled, hand-held scanner that has been paired with your mobile device or tap the camera icon to use your mobile device's camera to scan the barcode.

3. Perform item actions.

   1. In an item row, swipe at the right edge from right to left to display the actions that you can perform on individual items.

   ![Item Actions](image)

   **Item Actions**

   2. Select **Clear** or **More** (to display additional actions). **More** displays actions from the Scan In Settings options that you may not have already selected as a default action.

   ![Choose action](image)
3. Tap the action that you want to perform for the row item.
4. If you choose to take no action, swipe the row from left to right to remove the action buttons.

Managing Your Scan In List

With the Pages icon, you can selectively delete items from the Scan In List or you can choose to delete all the items in the Scan In list.

To manage your Scan In list:

1. Tap the Pages icon.

2. Tap one of the following options:
   - Selective Clear
   - Clear All
   - Cancel

When you tap Selective Clear, delete icons appear next to each item in the list.

3. Delete items as needed.
Working with Restore

For items that you want to restore to their permanent locations, use the Restore feature.

To restore items:

1. Select the Restore tab.

2. Scan a barcode.
   - If you enabled the Check Requests setting, the system checks for requests; and if a request is found, the system responds with the following message.

   **Requests Found Message**
   
   If you decide to continue with restoring the item to its permanent location, swipe to the left on the item, tap Confirm Restore, and select OK.
If the Check Requests setting is not enabled or you choose to **Confirm Restore** regardless of any requests, the item is restored to its permanent location. Details of the restored item are provided in the Scan In Items list.

3. Repeat these steps to restore additional items.

**Working with Pick Up from Shelf**

See **Working with Pick Up from Shelf** for more information.
Working with Alma Mobile Settings

See Working with Settings for information about customizing your Alma Mobile settings.