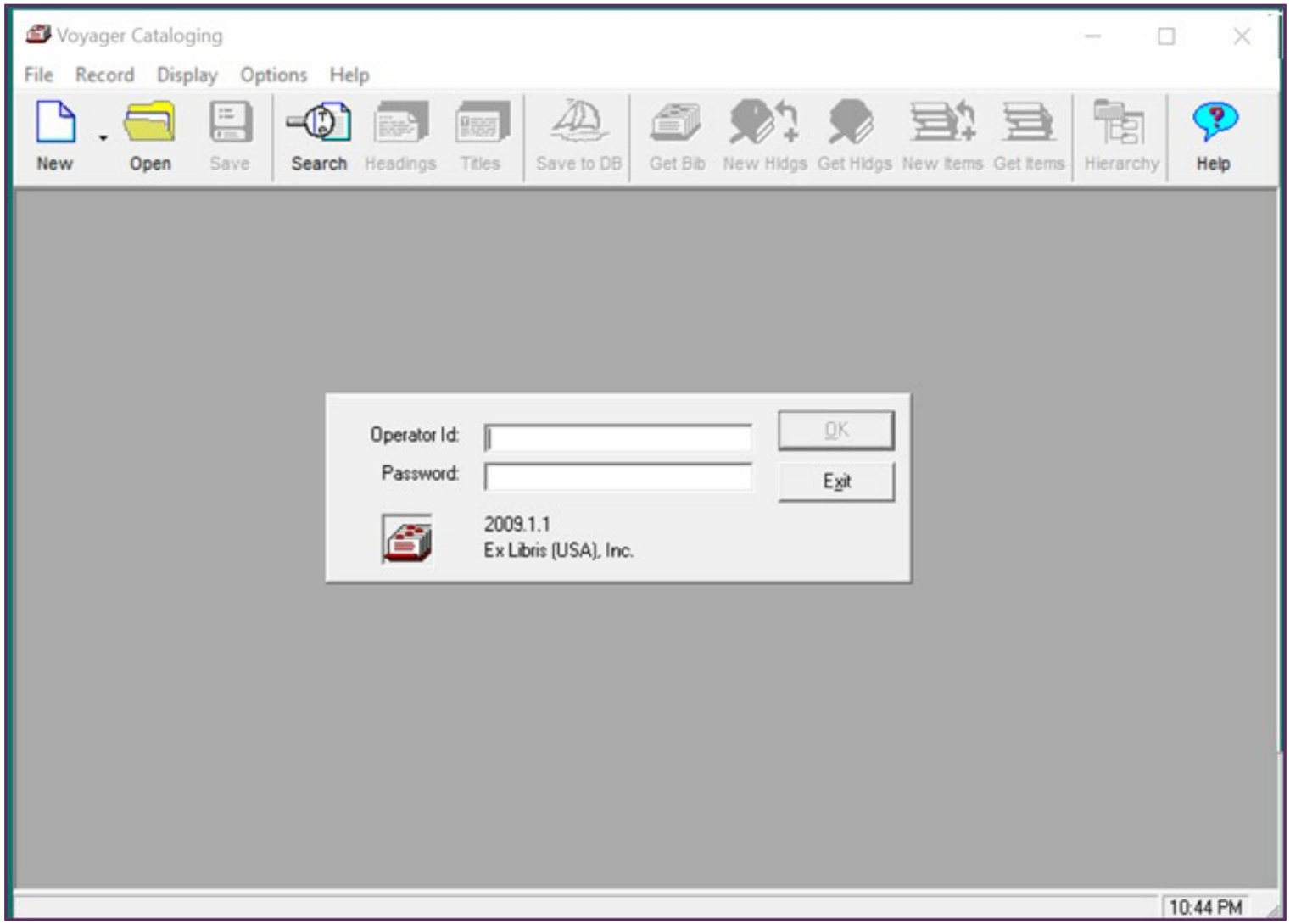
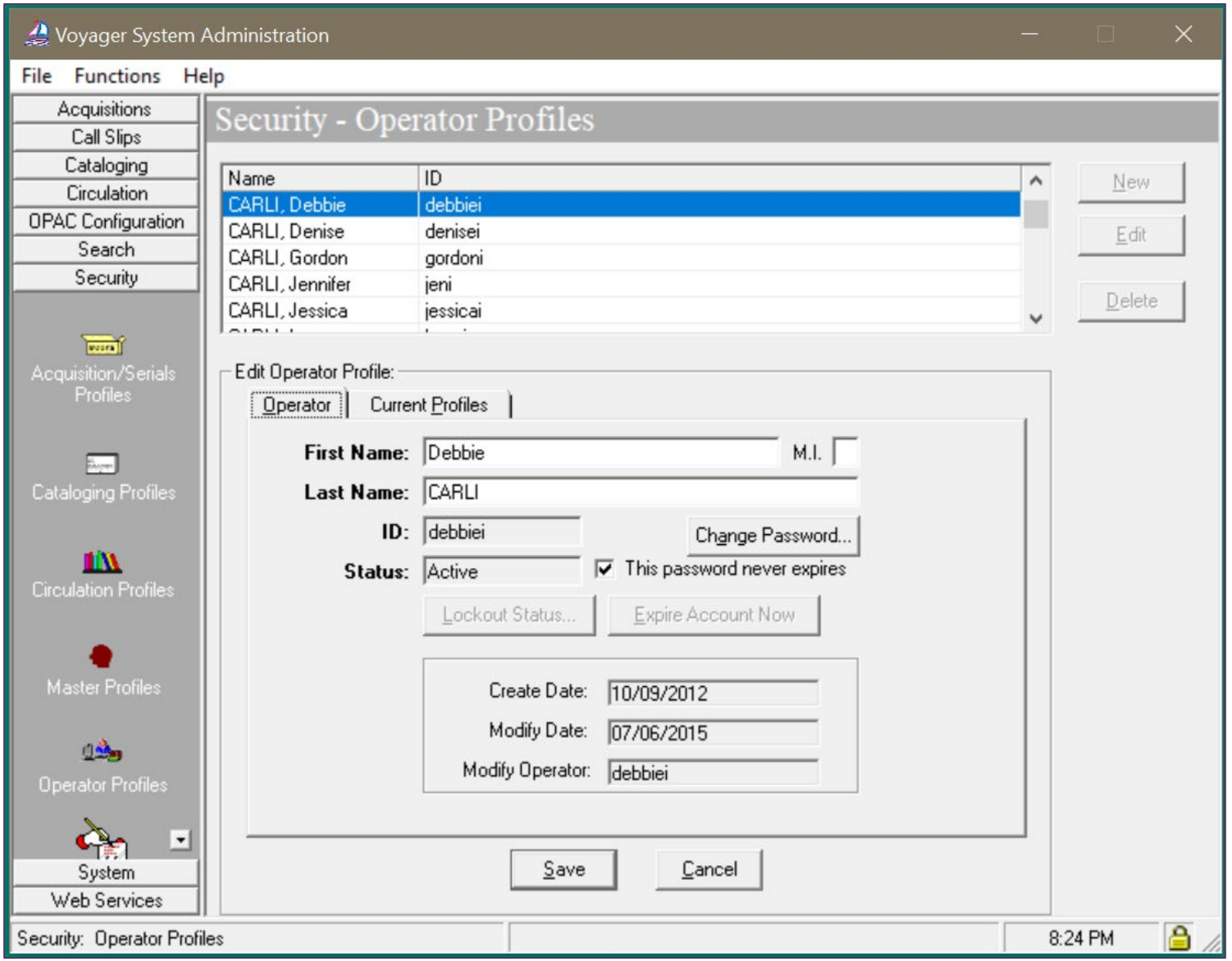
Open Office Hours 10/31/2019 Agenda

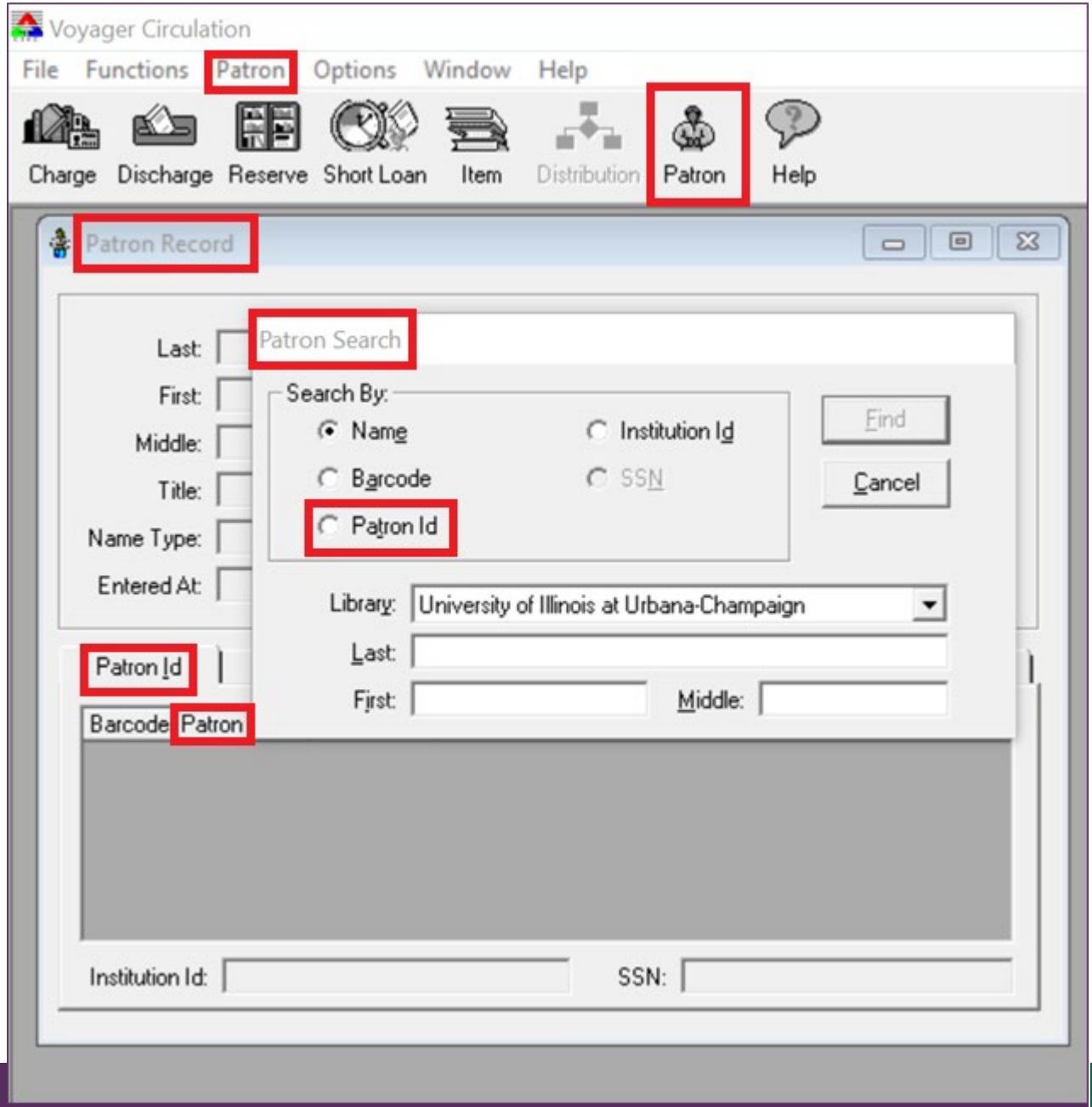
- Users, Privileges, Roles, and Profiles: Comparison of Voyager to Alma
- Streamlining the process of Alma Role Assignment
- Documentation for later review
- Phase 2 preparation

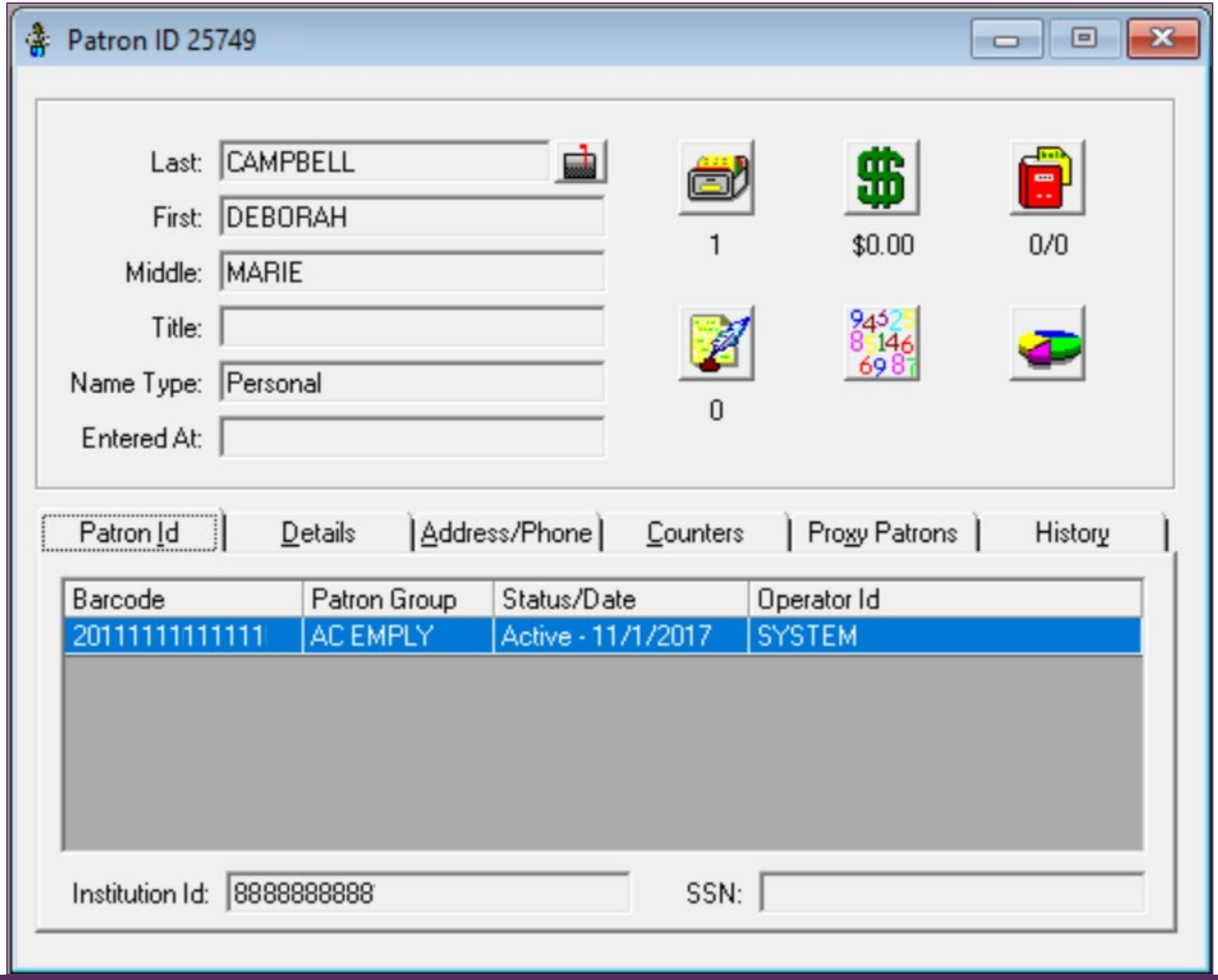
Staff Login to Voyager Clients




Voyager System Administration
File
Functions
Help
Acquisitions
Call Slips
Cataloging
Circulation
OPAC Configuration
Search
Security
Acquisition/Serials Profiles
Cataloging Profiles
Circulation Profiles
Master Profiles
Operator Profiles
System
Web Services
Security - Operator Profiles
Name
ID
CARLI, Debbie
debbiei
CARLI, Denise
denisei
CARLI, Gordon
gordoni
CARLI, Jennifer
jeni
CARLI, Jessica
jessicai
New
Edit
Delete
Edit Operator Profile:
Operator
Current Profiles
First Name:
Debbie
M.I.
Last Name:
CARLI
ID:
debbiei
Change Password...
Status:
Active
This password never expires
Lockout Status...
Expire Account Now
Create Date:
10/09/2012
Modify Date:
07/06/2015
Modify Operator:
debbiei
Save
Cancel
Security: Operator Profiles
8:24 PM

Patron Accounts for Library Services




Patron ID 25749
Last: CAMPBELL
First: DEBORAH
Middle: MARIE
Title:
Name Type: Personal
Entered At:
1
$0.00
0/0
0
Patron Id
Details
Address/Phone
Counters
Proxy Patrons
History
Barcode
Patron Group
Status/Date
Operator Id
20111111111111
AC EMPLY
Active - 11/1/2017
SYSTEM
Institution Id: 8888888888
SSN:

Library catalog: University of Illinois at Urbana-Champaign

New VuFind Search

VuFind Search

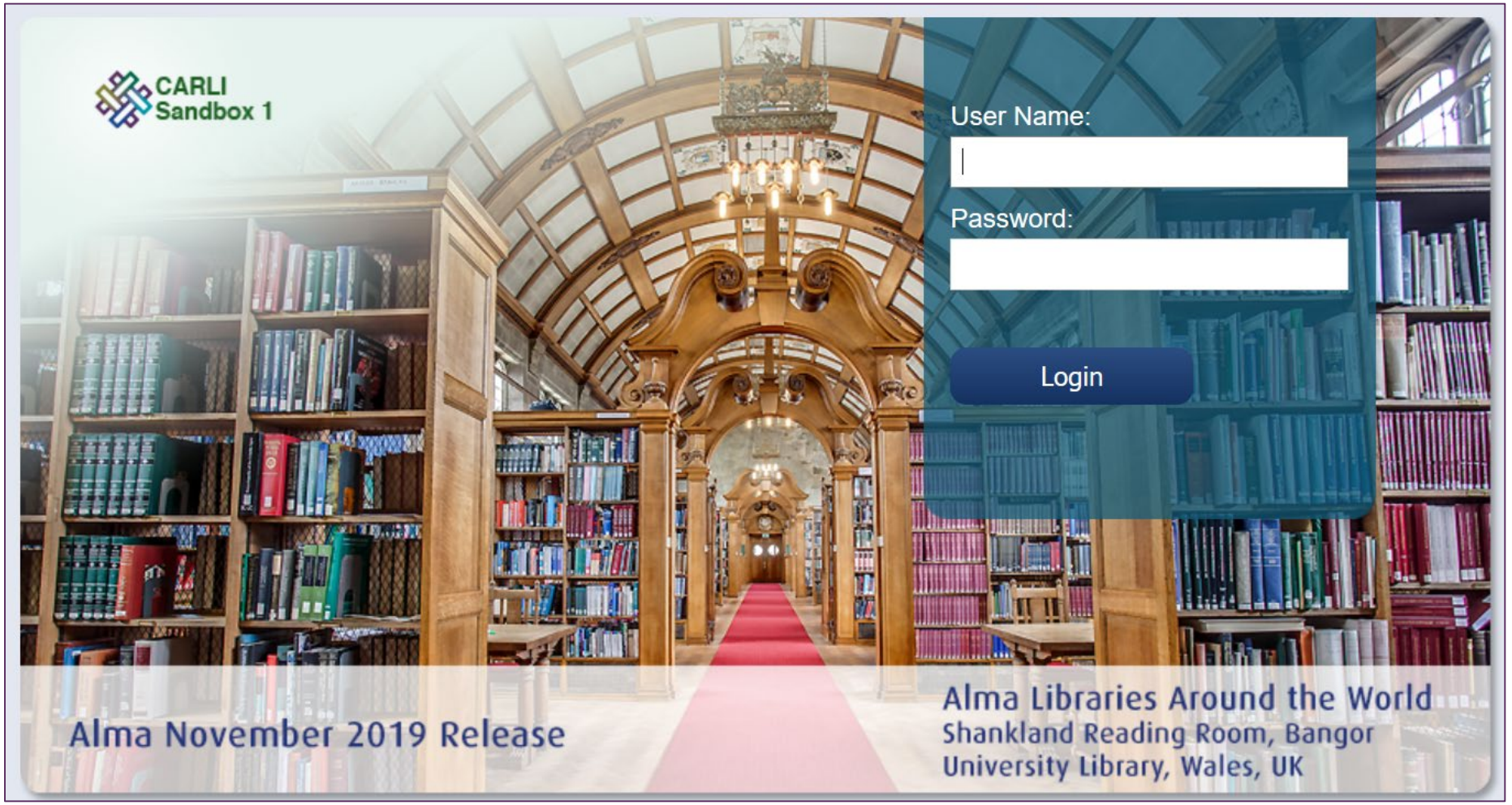
Classic Search

What are the differences?

I-Share includes the resources of 91 Illinois libraries that belong to CARLI.

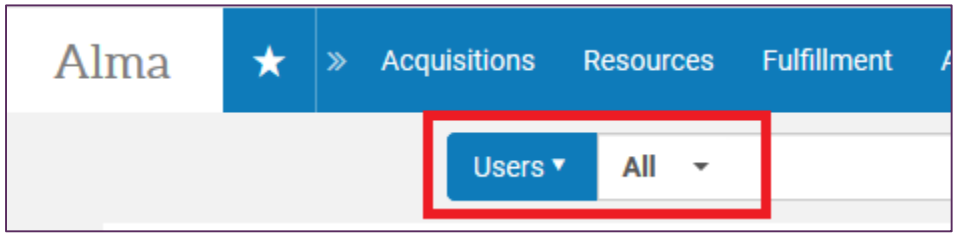
About I-Share | List of I-Share Libraries | Map of I-Share Libraries

Staff Login to Alma

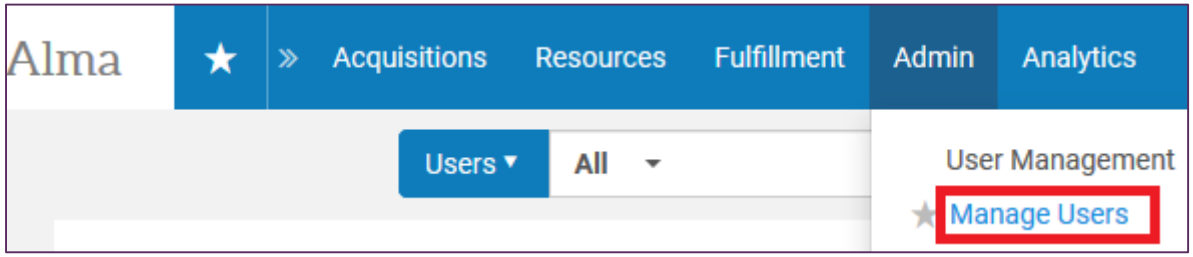


User Accounts in Alma

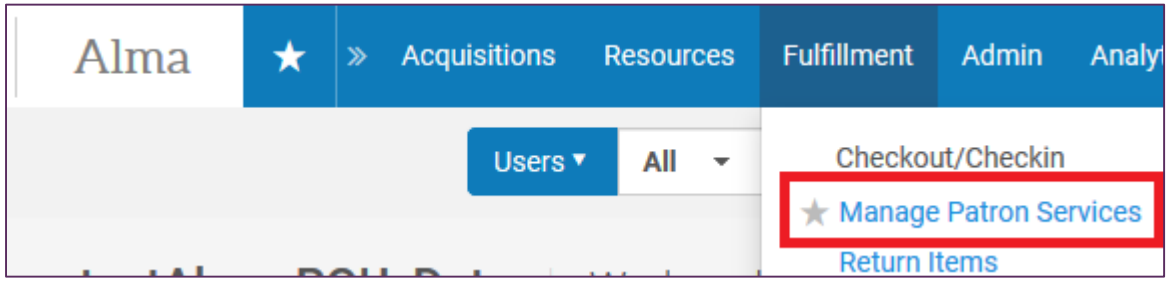
- Alma Basic Search bar> select Users from the drop-down



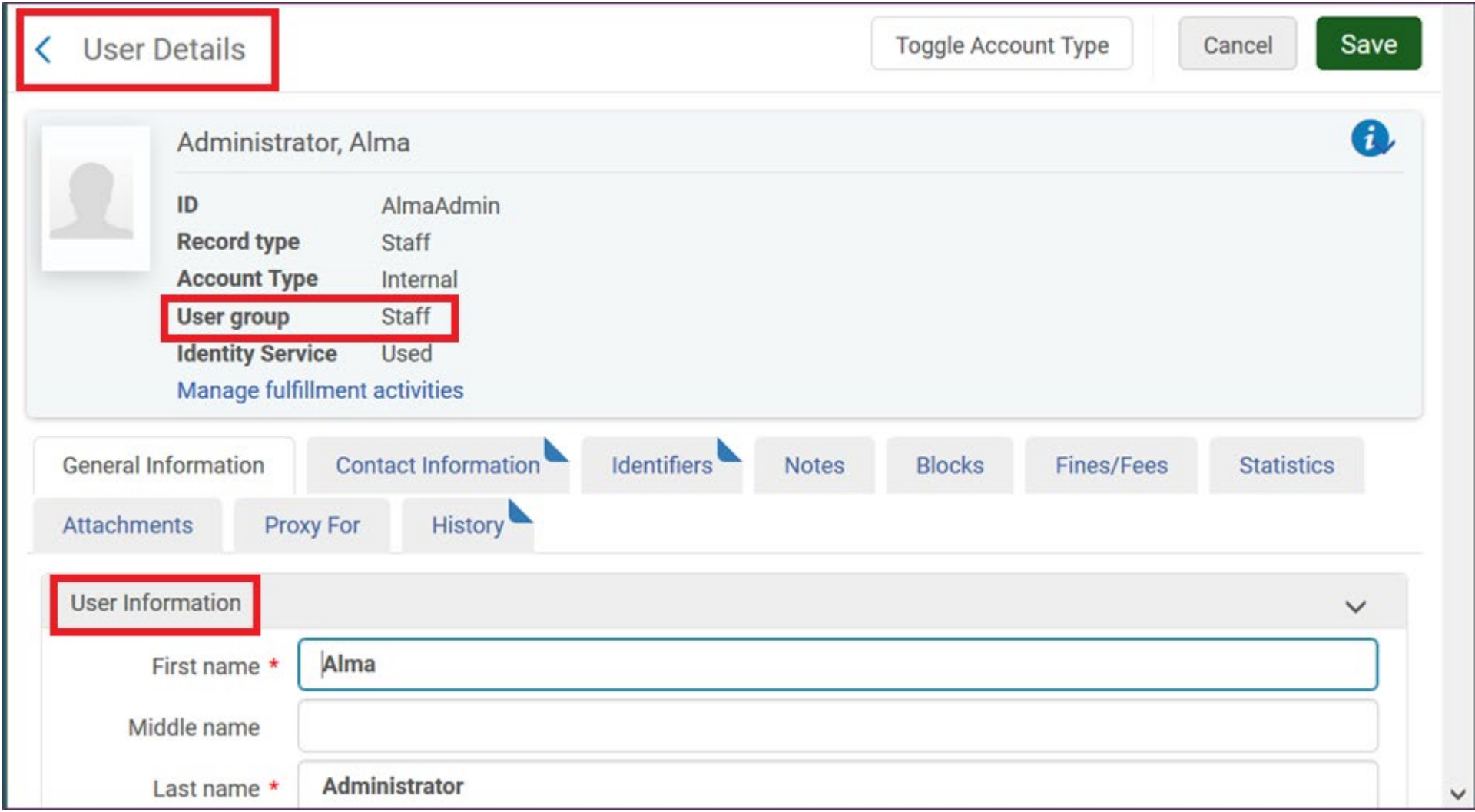
- Admin menu> User Management> Manage Users



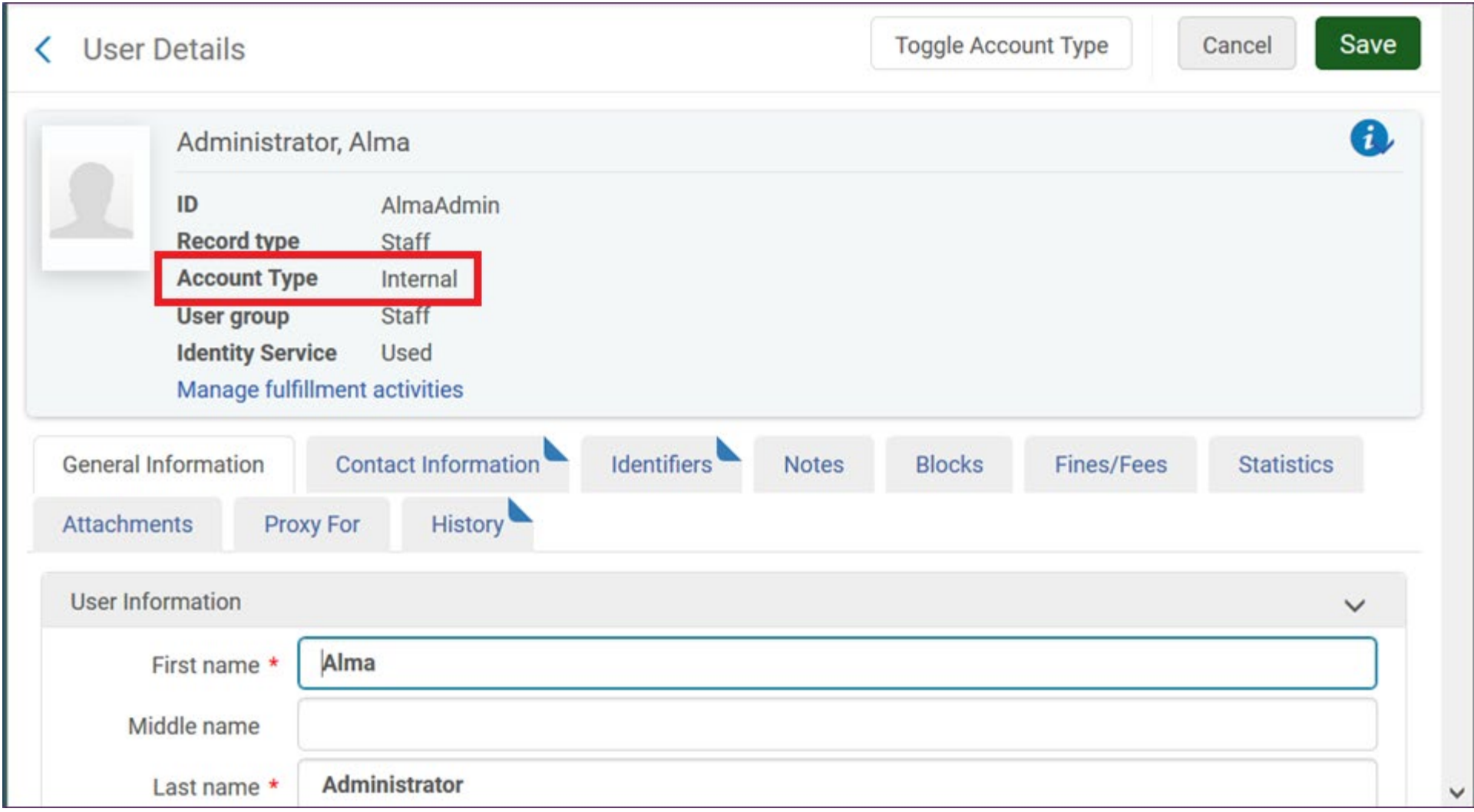
- Fulfillment menu> Manage Patron Services



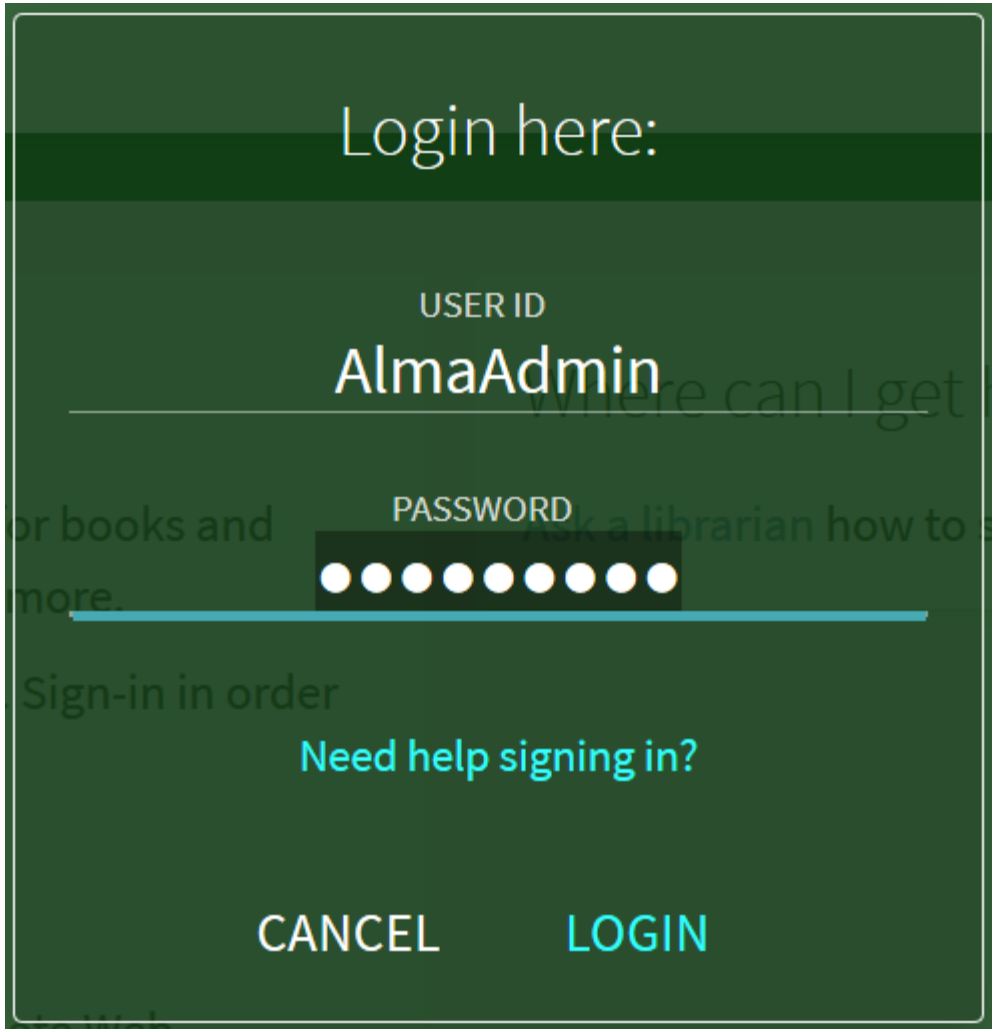
User Accounts in Alma



Internal vs. External Account Types



Primo VE Login



Patron and User Accounts Summary

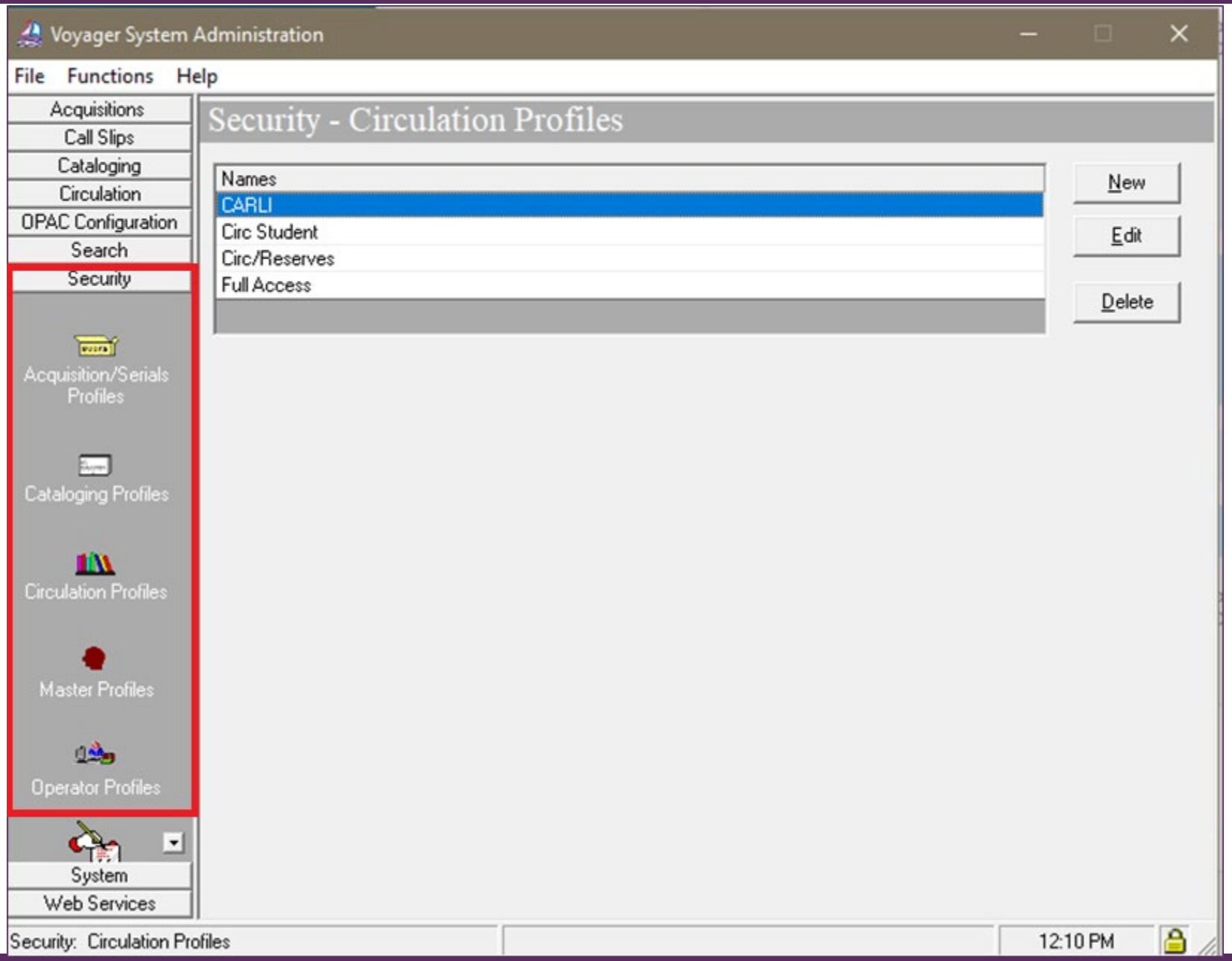
Voyager

- Login to clients is not associated with staff member's other accounts.
- OPAC account is affiliated with Voyager patron account; additional username/password may be required.
- Patron records are used only for circulation transactions.

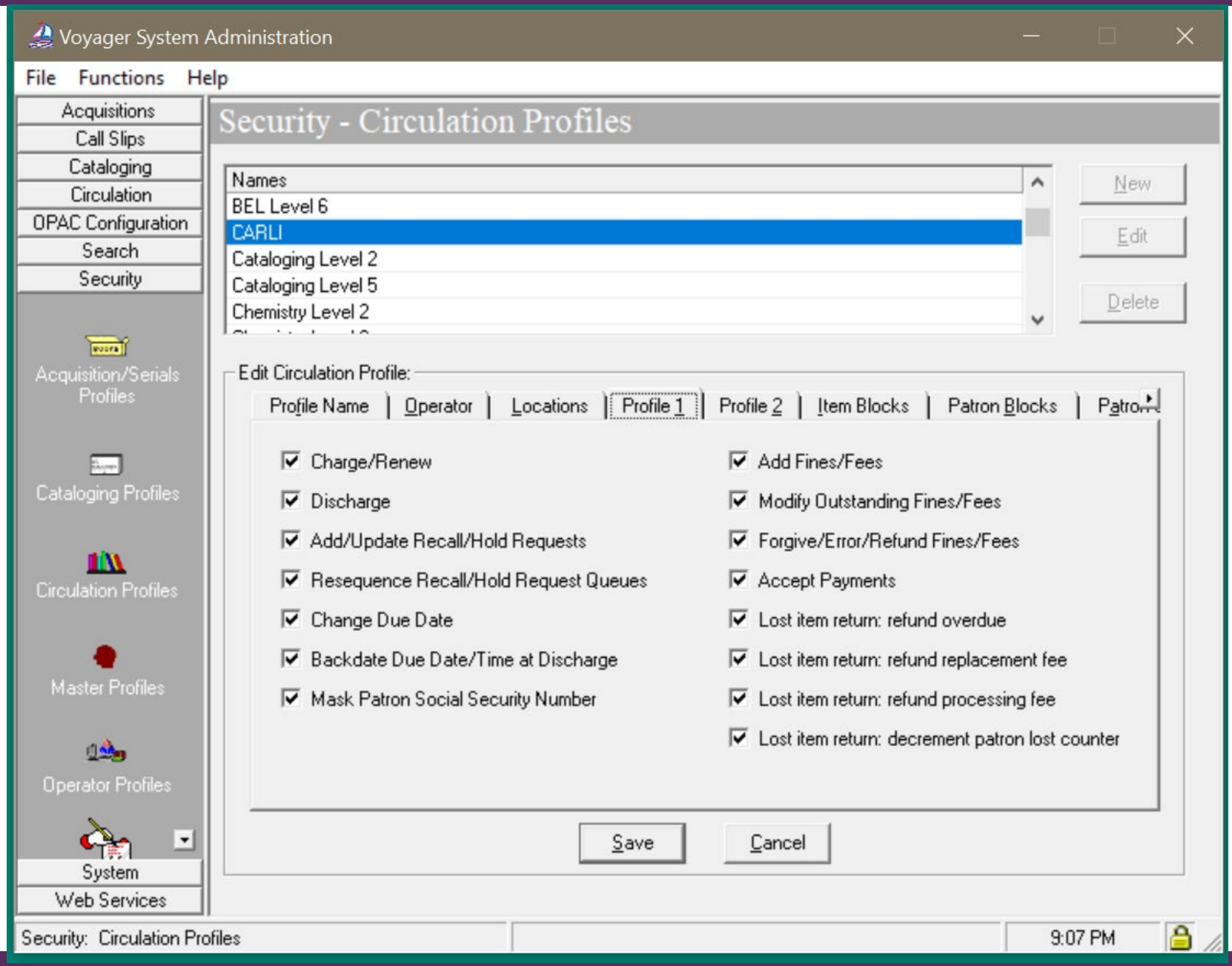
Alma

- Alma login will be same username and password staff use for Primo VE login.
- If staff member's account is externally authenticated, username/password will be the same as campus services.
- User records can have roles assigned beyond "Patron."

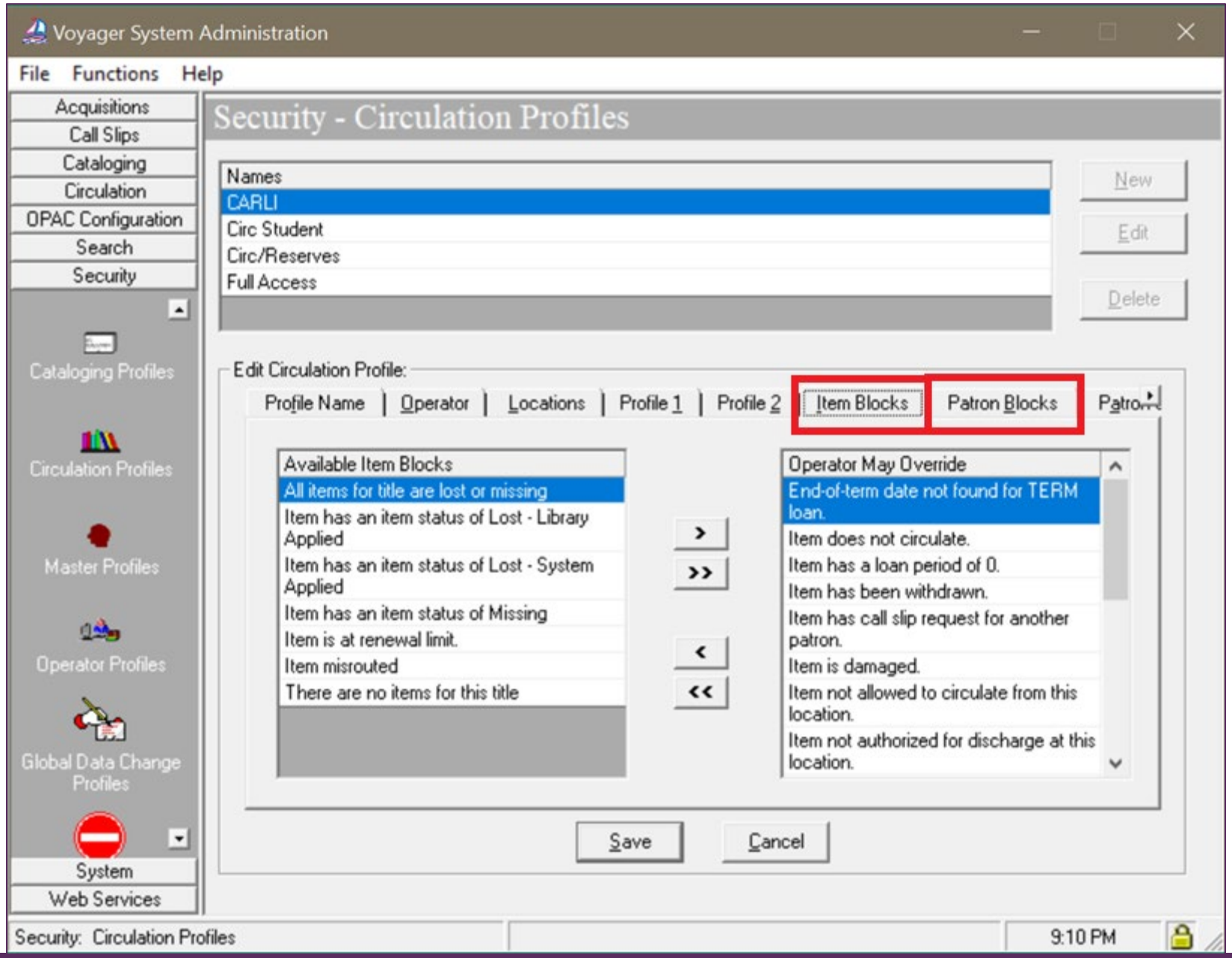
VOYAGER SYSADMIN



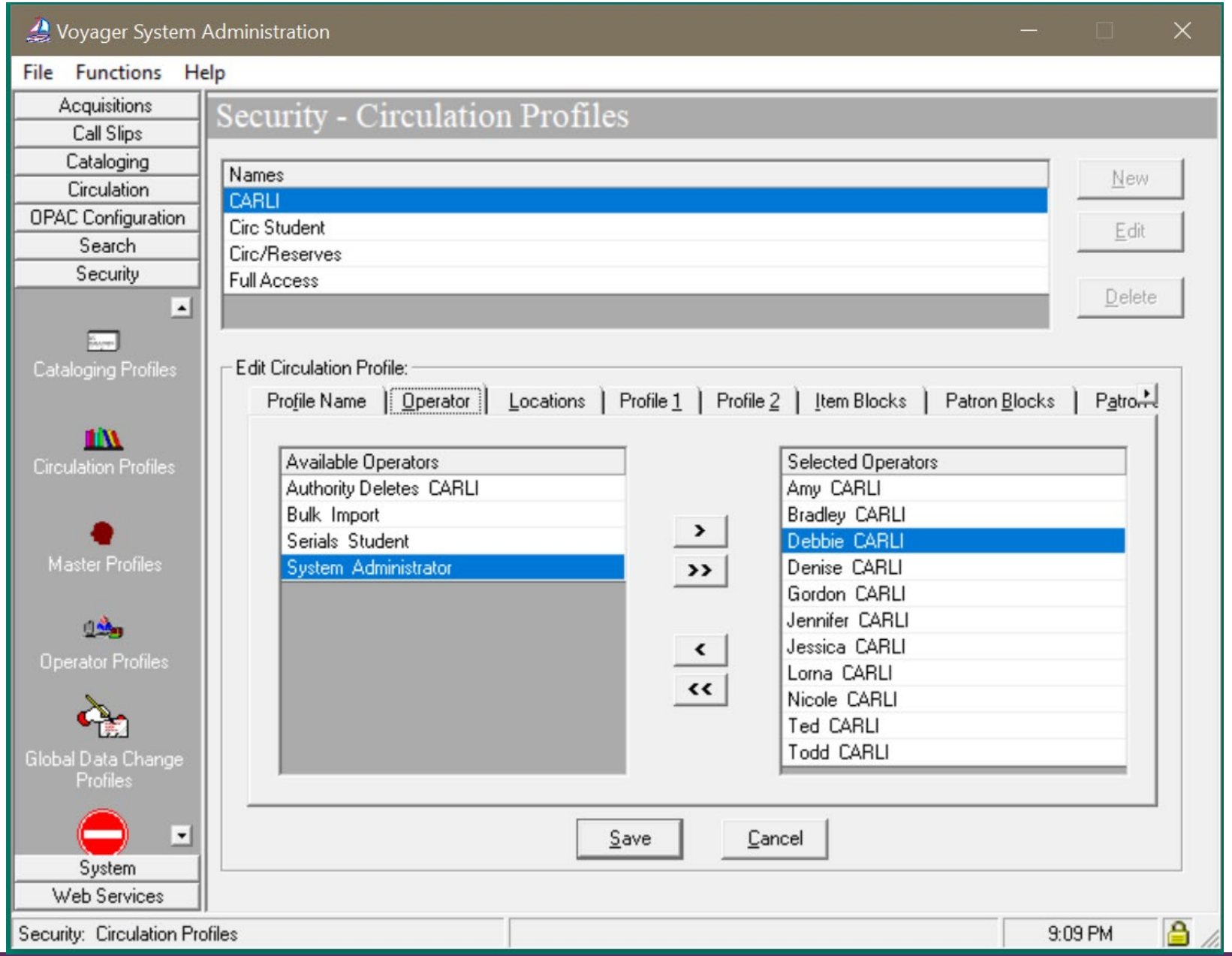
VOYAGER SYSADMIN

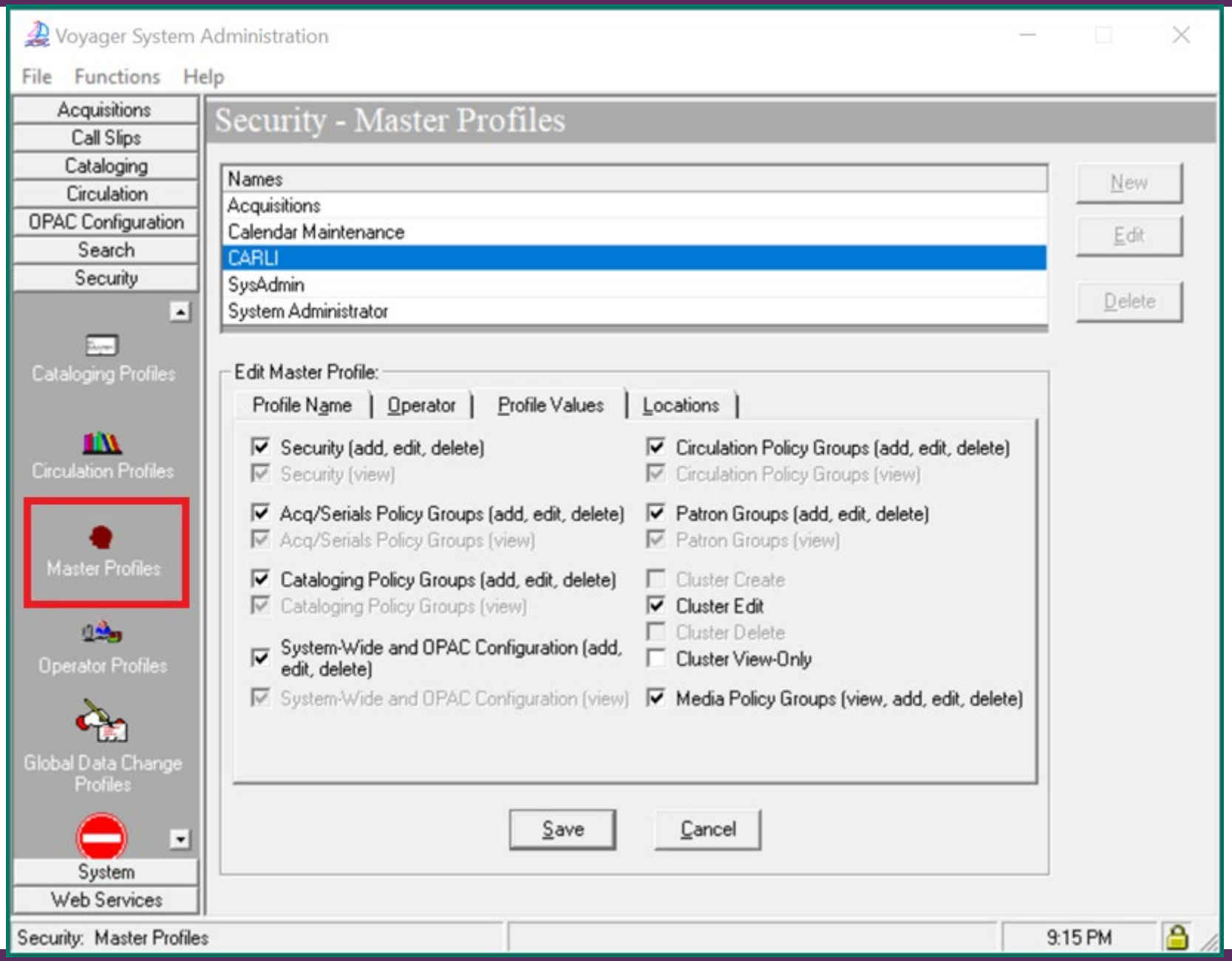


VOYAGER SYSADMIN



VOYAGER SYSADMIN




Voyager System Administration
File
Functions
Help
Acquisitions
Call Slips
Cataloging
Circulation
OPAC Configuration
Search
Security
Cataloging Profiles
Circulation Profiles
Master Profiles
Operator Profiles
Global Data Change Profiles
System
Web Services
Security - Master Profiles
Names
Acquisitions
Calendar Maintenance
CARLI
SysAdmin
System Administrator
New
Edit
Delete
Edit Master Profile:
Profile Name
Operator
Profile Values
Locations
Security (add, edit, delete)
Security (view)
Acq/Serials Policy Groups (add, edit, delete)
Acq/Serials Policy Groups (view)
Cataloging Policy Groups (add, edit, delete)
Cataloging Policy Groups (view)
System-Wide and OPAC Configuration (add, edit, delete)
System-Wide and OPAC Configuration (view)
Circulation Policy Groups (add, edit, delete)
Circulation Policy Groups (view)
Patron Groups (add, edit, delete)
Patron Groups (view)
Cluster Create
Cluster Edit
Cluster Delete
Cluster View-Only
Media Policy Groups (view, add, edit, delete)
Save
Cancel
Security: Master Profiles
9:15 PM

Roles in Alma

- User Roles – Descriptions and Accessible Components – descriptive list of all of the Roles available in Alma.
- Roles Report - describes what a user can do in Alma if assigned a specific role.
- Privileges Report - pairs a specific role back to a coded list of the privileges that comprise that role.

Fulfillment Roles

- Circulation Desk Manager
- Circulation Desk Operator
- Circulation Desk Operator – Limited

- Course Reserves Manager
- Course Reserves Operator
- Course Reserves Viewer

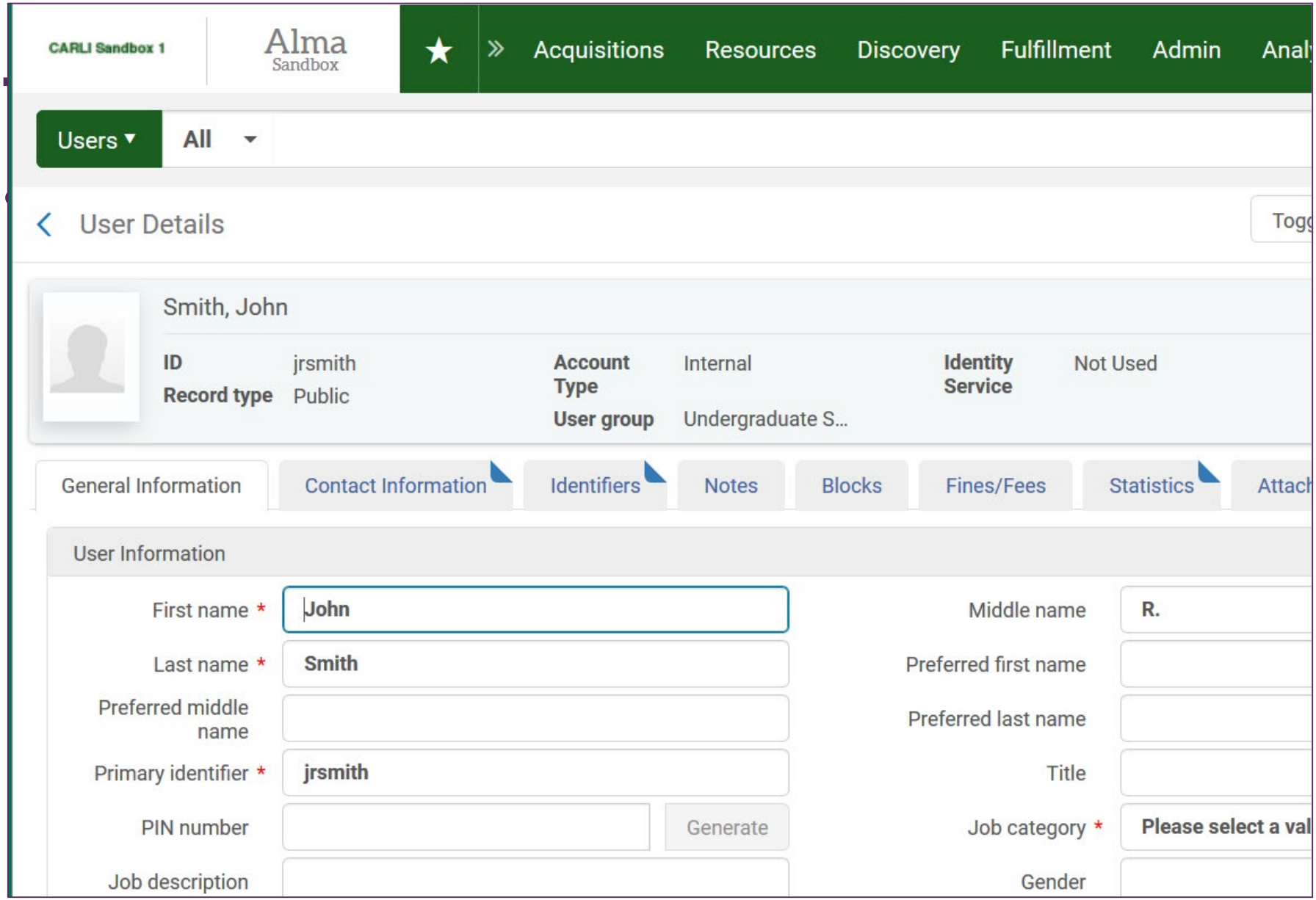
- Fulfillment Administrator
- Fulfillment Services Manager
- Fulfillment Services Operator

- Instructor
- Leganto Course Operator
- Patron
- Requests Operator
- Resource Sharing Partners Manager
- Work Order Operator

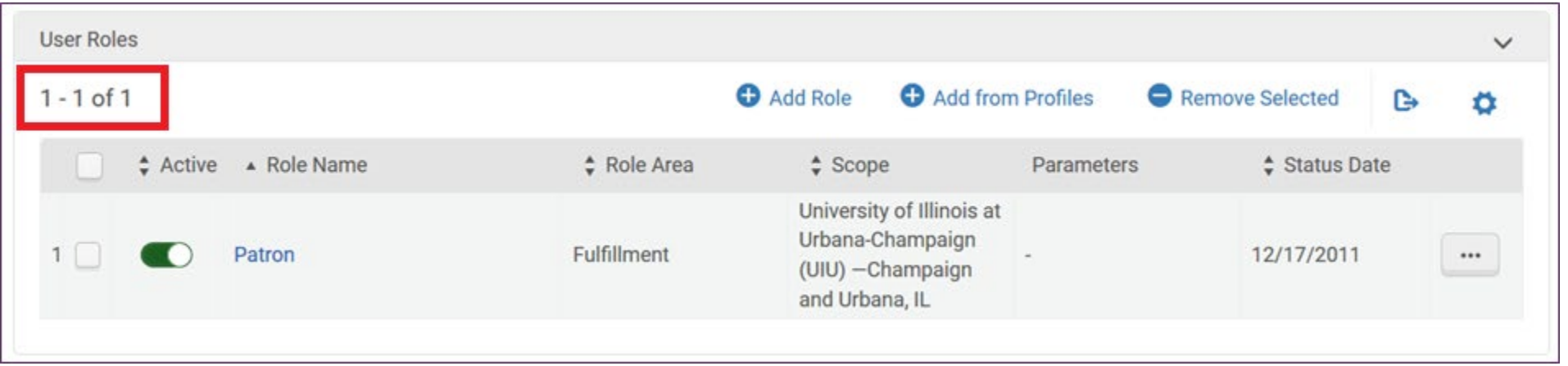
Ex Libris Documentation on Users

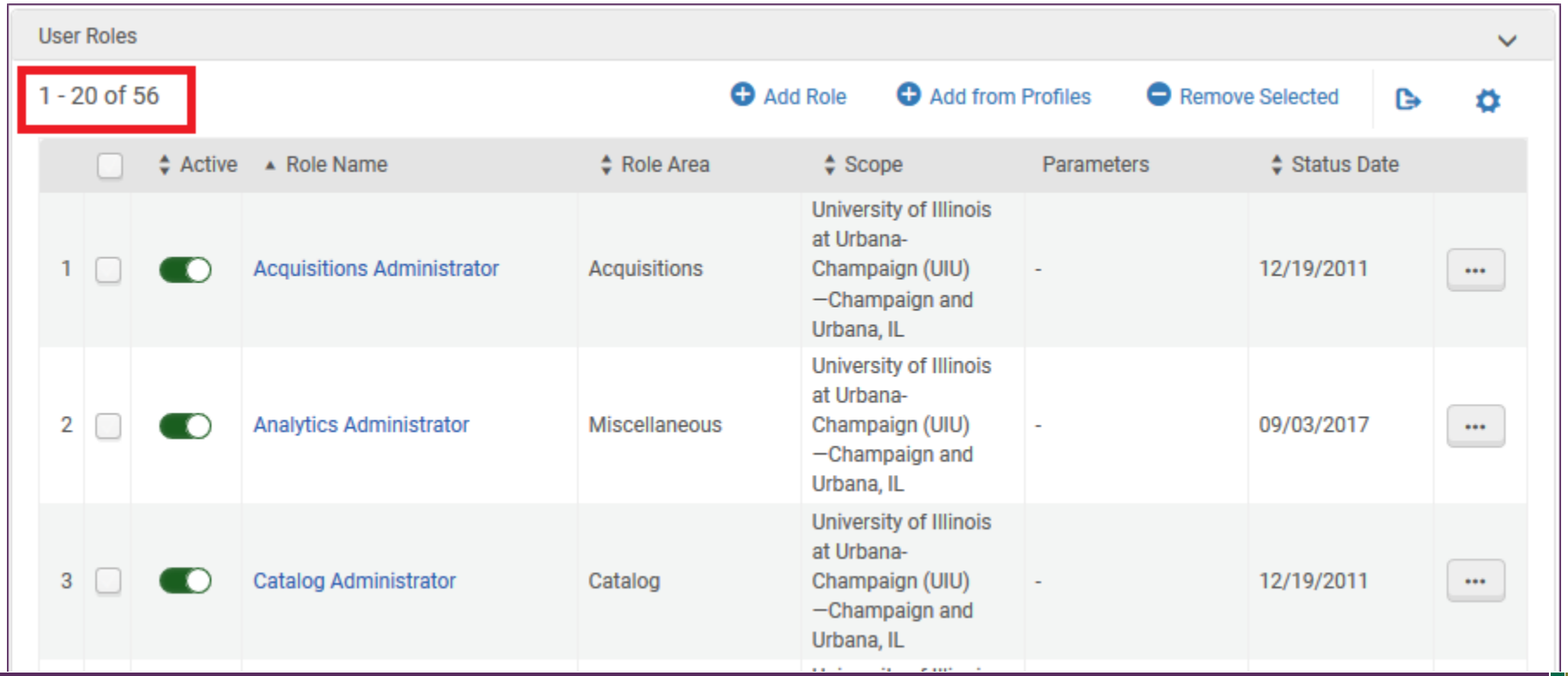
- Managing Users in Alma
- Managing User Roles
- Alma Essentials Video: Day-to-Day User Management
- Alma Certification Video: User Roles

ALMA ROLES

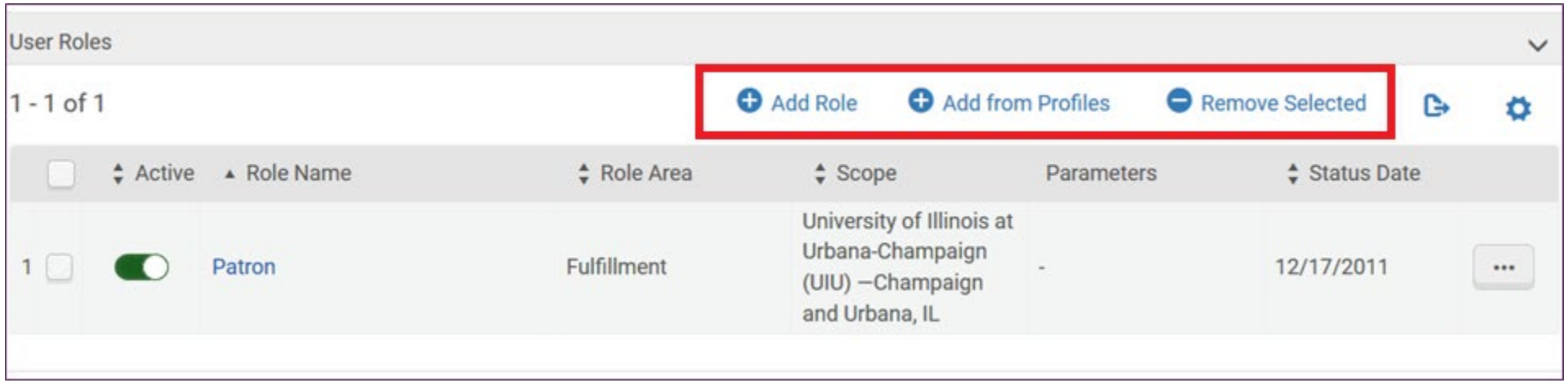

CARLI Sandbox 1
Alma
Sandbox
Acquisitions
Resources
Discovery
Fulfillment
Admin
Users
All
User Details
Smith, John
ID jrsmith
Record type Public
Account Type Internal
User group Undergraduate S...
Identity Service Not Used
General Information
Contact Information
Identifiers
Notes
Blocks
Fines/Fees
Statistics
User Information
First name * John
Last name * Smith
Preferred middle name
Primary identifier * jrsmith
PIN number
Generate
Job description
Middle name R.
Preferred first name
Preferred last name
Title
Job category * Please select a val
Gender

ALMA ROLES

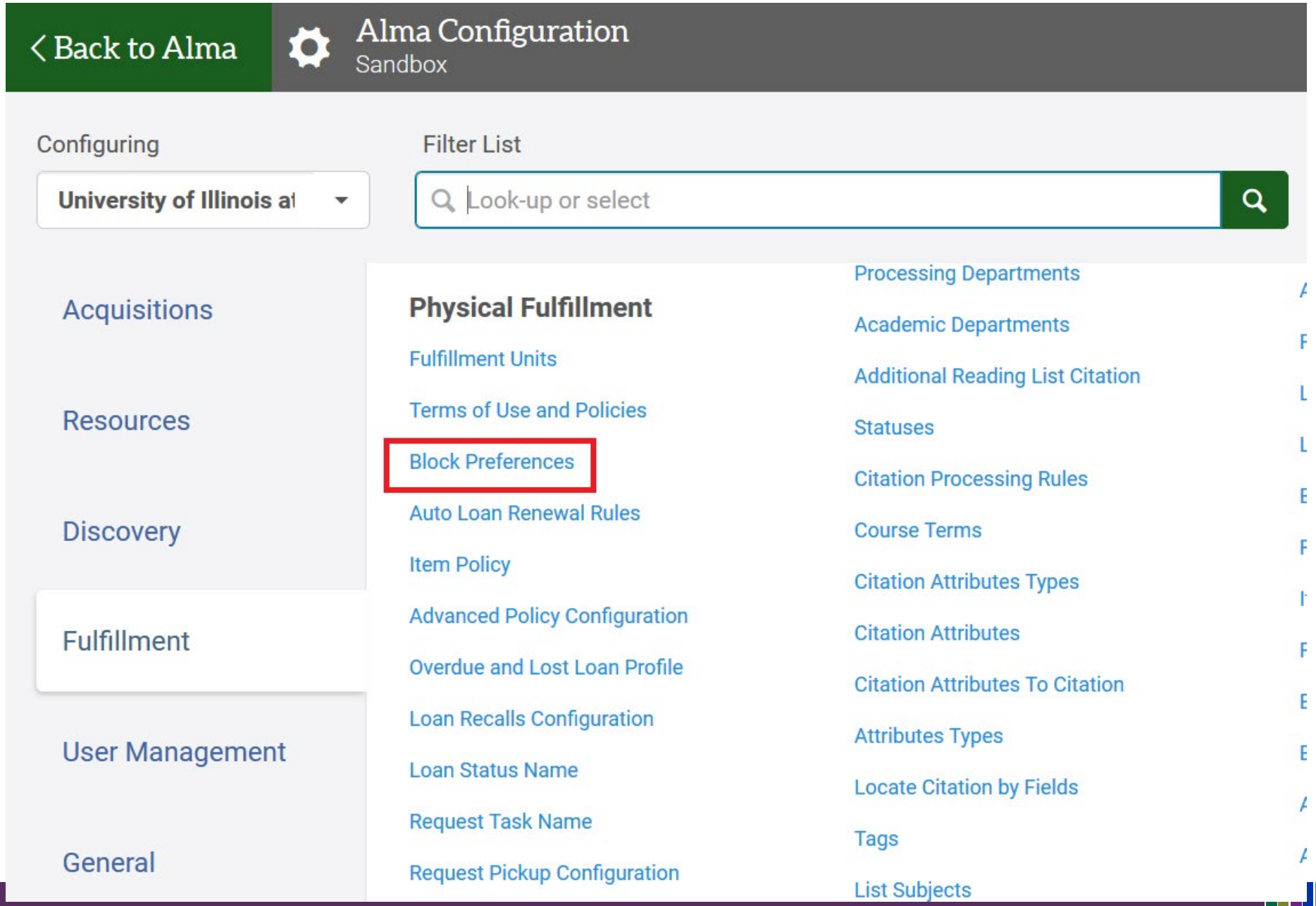

User Roles
1 - 1 of 1
Add Role
Add from Profiles
Remove Selected
Active
Role Name
Role Area
Scope
Parameters
Status Date
1
Patron
Fulfillment
University of Illinois at Urbana-Champaign (UIU) —Champaign and Urbana, IL
-
12/17/2011

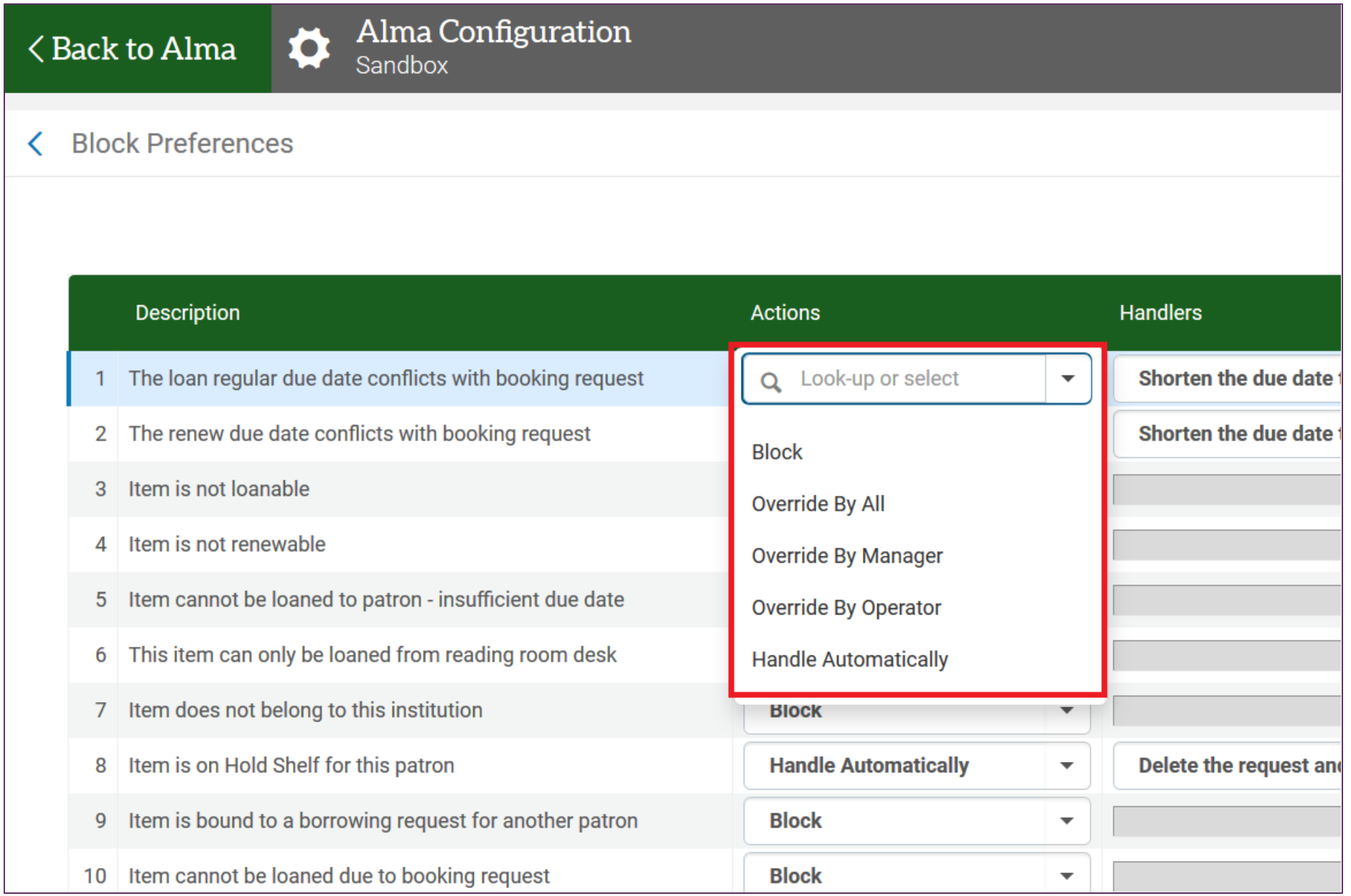

User Roles
1 - 20 of 56
Add Role
Add from Profiles
Remove Selected
Active
Role Name
Role Area
Scope
Parameters
Status Date
1
Acquisitions Administrator
Acquisitions
University of Illinois at Urbana-Champaign (UIU) —Champaign and Urbana, IL
-
12/19/2011
2
Analytics Administrator
Miscellaneous
University of Illinois at Urbana-Champaign (UIU) —Champaign and Urbana, IL
-
09/03/2017
3
Catalog Administrator
Catalog
University of Illinois at Urbana-Champaign (UIU) —Champaign and Urbana, IL
-
12/19/2011

Adding Roles to an Individual User's Account



ALMA ROLES


Back to Alma
Alma Configuration
Sandbox
Configuring
University of Illinois at
Filter List
Look-up or select
Acquisitions
Resources
Discovery
Fulfillment
User Management
General
Physical Fulfillment
Fulfillment Units
Terms of Use and Policies
Block Preferences
Auto Loan Renewal Rules
Item Policy
Advanced Policy Configuration
Overdue and Lost Loan Profile
Loan Recalls Configuration
Loan Status Name
Request Task Name
Request Pickup Configuration
Processing Departments
Academic Departments
Additional Reading List Citation
Statuses
Citation Processing Rules
Course Terms
Citation Attributes Types
Citation Attributes
Citation Attributes To Citation
Attributes Types
Locate Citation by Fields
Tags
List Subjects


Back to Alma
Alma Configuration
Sandbox
Block Preferences
Description
Actions
Handlers
1 The loan regular due date conflicts with booking request
Look-up or select
Shorten the due date
2 The renew due date conflicts with booking request
Shorten the due date
3 Item is not loanable
4 Item is not renewable
5 Item cannot be loaned to patron - insufficient due date
6 This item can only be loaned from reading room desk
7 Item does not belong to this institution
Block
8 Item is on Hold Shelf for this patron
Handle Automatically
Delete the request and
9 Item is bound to a borrowing request for another patron
Block
10 Item cannot be loaned due to booking request
Block
Block
Override By All
Override By Manager
Override By Operator
Handle Automatically

Staff Permissions Summary

Voyager

- Voyager System Administrators can assign library staff operator IDs to functional area security profiles.
- All operators that are assigned the same profile, have identical permissions.
- The ability to override circulation item/patron blocks is set in the Circulation profiles.

Alma

- Library staff, who have passed Alma Certification and who are assigned the Alma “User Administrators” or Alma “User Managers” roles, can assign roles to other library staff members.
- Multiple roles can be assigned simultaneously using a role profile and/or additional roles can be assigned individually.
- The ability to override fulfillment blocks is set in Alma Configuration based on Circulation Desk Roles.

Streamlining the Process

- Role Profiles
- Updating user roles with the Update/Notify Users job
- Automatic Role Assignment Rules

Phase 2: What to expect

- CARLI Office will be in contact with each library's Alma Primo VE contact:
  - Directions for creating profiles and assigning roles to users
  - Alma roles/profiles worksheet
  - Reminders and responsibilities worksheet

Thank you!

Join us next Thursday at 2pm for another Office Hour

You can always contact CARLI at support@carli.Illinois.edu