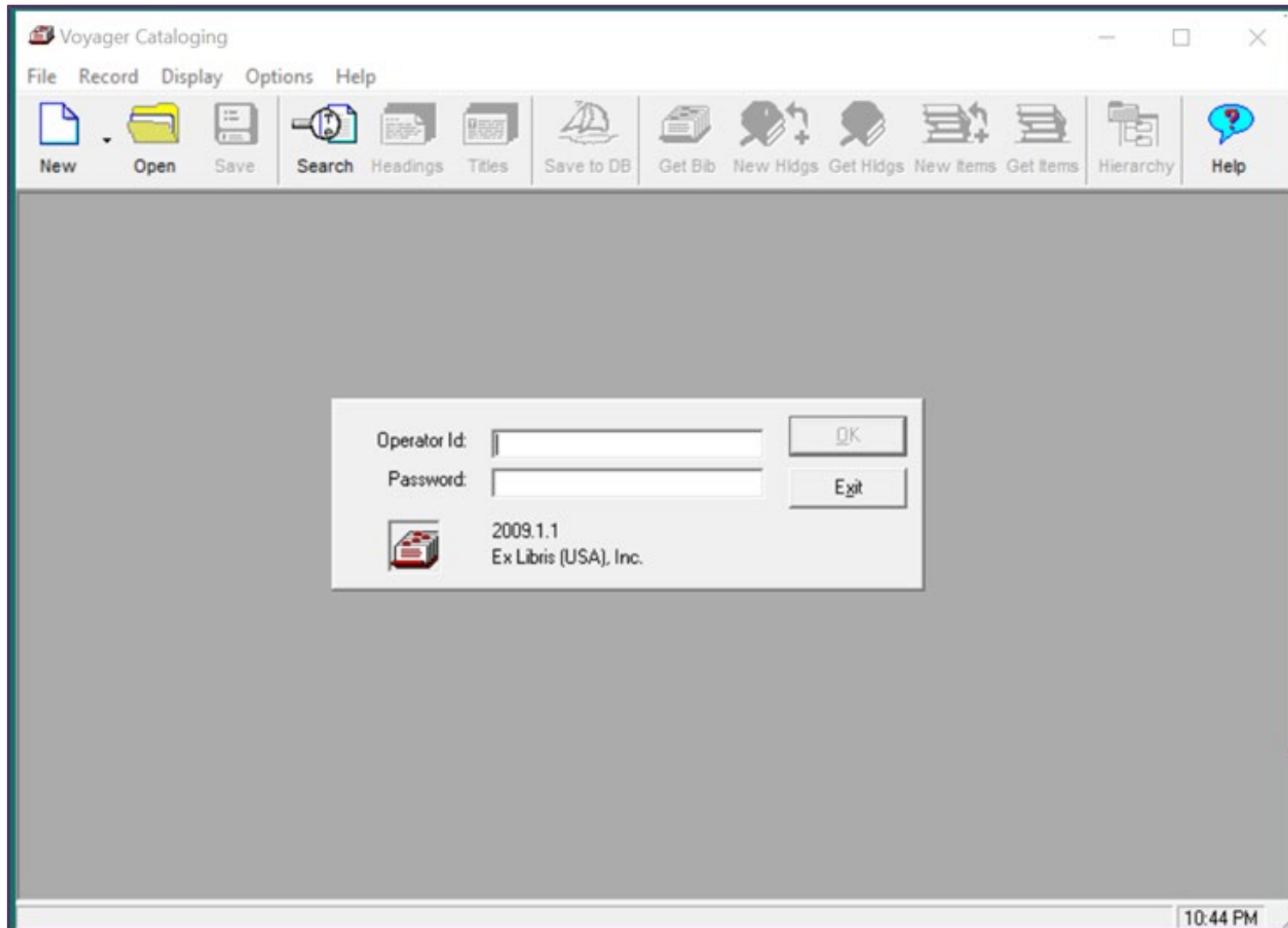


Open Office Hours 10/31/2019 Agenda

- 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: M.I.

Last Name:

ID:

Status: This password never expires

Create Date:

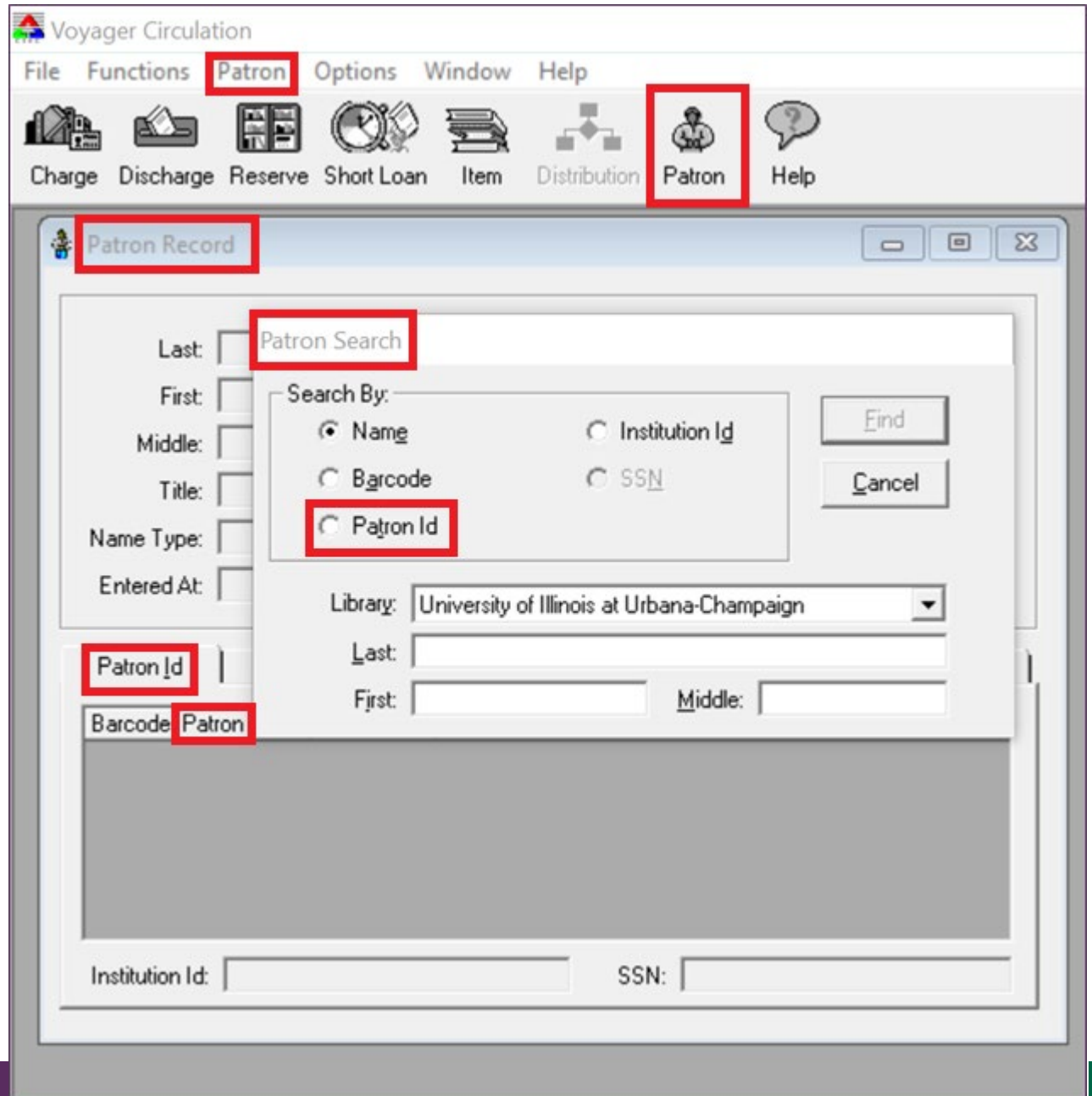
Modify Date:

Modify Operator:

Save Cancel

Security: Operator Profiles 8:24 PM

Patron Accounts for Library Services



Patron ID 25749

Last: <input type="text" value="CAMPBELL"/>	 1	 \$0.00	 0/0
First: <input type="text" value="DEBORAH"/>			
Middle: <input type="text" value="MARIE"/>			
Title: <input type="text"/>			
Name Type: <input type="text" value="Personal"/>	 0	 9452 8-146 6987	
Entered At: <input type="text"/>			

Patron Id	Details	Address/Phone	Counters	Proxy Patrons	History
-----------	---------	---------------	----------	---------------	---------

Barcode	Patron Group	Status/Date	Operator Id
2011111111111	AC EPLY	Active - 11/1/2017	SYSTEM

Institution Id: <input type="text" value="8888888888"/>	SSN: <input type="text"/>
---	---------------------------



Library catalog: ▼

[New VuFind Search](#)

[VuFind Search](#)

[Classic Search](#)

[What are the differences?](#)



Consortium of
Academic and Research
Libraries in Illinois

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 Name:

Password:

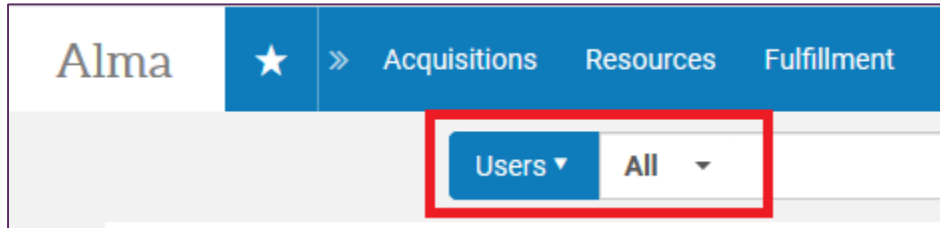
Login

Alma November 2019 Release

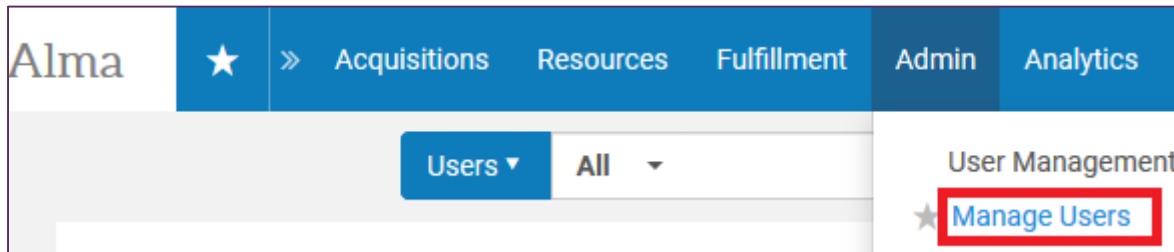
Alma Libraries Around the World
Shankland Reading Room, Bangor
University Library, Wales, UK

User Accounts in Alma

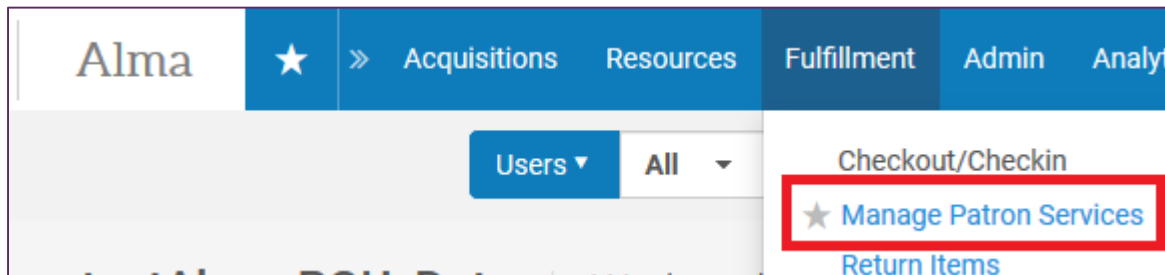
- Alma Basic Search bar > select Users from the drop-down



- Admin menu > User Management > Manage Users



- Fulfillment menu > Manage Patron Services



User Accounts in Alma

< User Details

Toggle Account Type

Cancel

Save



Administrator, Alma



ID AlmaAdmin

Record type Staff

Account Type Internal

User group Staff

Identity Service Used

[Manage fulfillment activities](#)

General Information

Contact Information

Identifiers

Notes

Blocks

Fines/Fees

Statistics

Attachments

Proxy For

History

User Information



First name * Alma

Middle name

Last name * Administrator

Internal vs. External Account Types

< User Details

Toggle Account Type

Cancel

Save



Administrator, Alma



ID AlmaAdmin

Record type Staff

Account Type Internal

User group Staff

Identity Service Used

[Manage fulfillment activities](#)

General Information

Contact Information

Identifiers

Notes

Blocks

Fines/Fees

Statistics

Attachments

Proxy For

History

User Information



First name * Alma

Middle name

Last name * Administrator

Primo VE Login

Login here:

USER ID
AlmaAdmin

PASSWORD
●●●●●●●●●●

Need help signing in?

CANCEL 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."

The screenshot shows the Voyager System Administration web interface. The title bar reads "Voyager System Administration". The main menu includes "File", "Functions", and "Help". A left-hand navigation pane is highlighted with a red border, containing the following items: "Acquisitions", "Call Slips", "Cataloging", "Circulation", "OPAC Configuration", "Search", "Security" (highlighted), "Acquisition/Serials Profiles", "Cataloging Profiles", "Circulation Profiles", "Master Profiles", "Operator Profiles", "System", and "Web Services".

The main content area is titled "Security - Circulation Profiles". It features a table with the following data:

Names
CARLI
Circ Student
Circ/Reserves
Full Access

To the right of the table are three buttons: "New", "Edit", and "Delete".



The screenshot shows the Voyager System Administration interface. The main window is titled "Security - Circulation Profiles". On the left is a navigation menu with categories: Acquisitions, Call Slips, Cataloging, Circulation, OPAC Configuration, Search, and Security. Under "Security", there are sub-items: Acquisition/Serials Profiles, Cataloging Profiles, Circulation Profiles (highlighted), Master Profiles, Operator Profiles, System, and Web Services. The main area displays a list of profiles: BEL Level 6, CARLI (selected), Cataloging Level 2, Cataloging Level 5, and Chemistry Level 2. To the right of the list are "New", "Edit", and "Delete" buttons. Below the list is an "Edit Circulation Profile:" dialog box. This dialog has tabs for "Profile Name", "Operator", "Locations", "Profile 1" (selected), "Profile 2", "Item Blocks", "Patron Blocks", and "Patron". The "Profile 1" tab contains a list of 14 options, all of which are checked:

- Charge/Renew
- Discharge
- Add/Update Recall/Hold Requests
- Resequence Recall/Hold Request Queues
- Change Due Date
- Backdate Due Date/Time at Discharge
- Mask Patron Social Security Number
- Add Fines/Fees
- Modify Outstanding Fines/Fees
- Forgive/Error/Refund Fines/Fees
- Accept Payments
- Lost item return: refund overdue
- Lost item return: refund replacement fee
- Lost item return: refund processing fee
- Lost item return: decrement patron lost counter

At the bottom of the dialog are "Save" and "Cancel" buttons. The status bar at the bottom of the application shows "Security: Circulation Profiles", "9:07 PM", and a lock icon.

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 - Circulation Profiles

Names
CARLI
Circ Student
Circ/Reserves
Full Access

New Edit Delete

Edit Circulation Profile:

Profile Name | Operator | Locations | Profile 1 | Profile 2 | **Item Blocks** | **Patron Blocks** | Patron

Available Item Blocks	Operator May Override
All items for title are lost or missing	End-of-term date not found for TERM loan.
Item has an item status of Lost - Library Applied	Item does not circulate.
Item has an item status of Lost - System Applied	Item has a loan period of 0.
Item has an item status of Missing	Item has been withdrawn.
Item is at renewal limit.	Item has call slip request for another patron.
Item misrouted	Item is damaged.
There are no items for this title	Item not allowed to circulate from this location.
	Item not authorized for discharge at this location.

Save Cancel

Security: Circulation Profiles 9:10 PM

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 - Circulation Profiles

Names	
CARLI	New
Circ Student	Edit
Circ/Reserves	
Full Access	Delete

Edit Circulation Profile:

Profile Name | **Operator** | Locations | Profile 1 | Profile 2 | Item Blocks | Patron Blocks | Patron

Available Operators		Selected Operators
Authority Deletes CARLI		Amy CARLI
Bulk Import	>	Bradley CARLI
Serials Student	>>	Debbie CARLI
System Administrator	<	Denise CARLI
	<<	Gordon CARLI
		Jennifer CARLI
		Jessica CARLI
		Lorna CARLI
		Nicole CARLI
		Ted CARLI
		Todd CARLI

Save Cancel

Security: Circulation Profiles 9:09 PM

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	New
Calendar Maintenance	Edit
CARLI	Delete
SysAdmin	
System Administrator	

Edit Master Profile:

Profile Name	Operator	Profile Values	Locations
<input checked="" type="checkbox"/> Security (add, edit, delete)		<input checked="" type="checkbox"/> Security (view)	<input checked="" type="checkbox"/> Circulation Policy Groups (add, edit, delete)
<input checked="" type="checkbox"/> Acq/Serials Policy Groups (add, edit, delete)		<input checked="" type="checkbox"/> Acq/Serials Policy Groups (view)	<input checked="" type="checkbox"/> Circulation Policy Groups (view)
<input checked="" type="checkbox"/> Cataloging Policy Groups (add, edit, delete)		<input checked="" type="checkbox"/> Cataloging Policy Groups (view)	<input checked="" type="checkbox"/> Patron Groups (add, edit, delete)
<input checked="" type="checkbox"/> System-Wide and OPAC Configuration (add, edit, delete)		<input checked="" type="checkbox"/> System-Wide and OPAC Configuration (view)	<input checked="" type="checkbox"/> Patron Groups (view)
			<input type="checkbox"/> Cluster Create
			<input checked="" type="checkbox"/> Cluster Edit
			<input type="checkbox"/> Cluster Delete
			<input type="checkbox"/> Cluster View-Only
			<input checked="" type="checkbox"/> Media Policy Groups (view, add, edit, delete)

Save Cancel



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](#)

CARLI Sandbox 1 **Alma** Sandbox

★ » Acquisitions Resources Discovery Fulfillment Admin Anal

Users ▾ All ▾

< User Details Togg



Smith, John

ID	jrsmith	Account Type	Internal	Identity Service	Not Used
Record type	Public	User group	Undergraduate S...		

General Information | Contact Information | Identifiers | Notes | Blocks | Fines/Fees | Statistics | Attach

User Information

First name *	<input type="text" value="John"/>	Middle name	<input type="text" value="R."/>
Last name *	<input type="text" value="Smith"/>	Preferred first name	<input type="text"/>
Preferred middle name	<input type="text"/>	Preferred last name	<input type="text"/>
Primary identifier *	<input type="text" value="jrsmith"/>	Title	<input type="text"/>
PIN number	<input type="text"/>	Job category *	<input type="text" value="Please select a val"/>
Job description	<input type="text"/>	Gender	<input type="text"/>

ALMA ROLES

User Roles

1 - 1 of 1

+ Add Role

+ Add from Profiles

- Remove Selected



<input type="checkbox"/>	Active	Role Name	Role Area	Scope	Parameters	Status Date	
1 <input type="checkbox"/>	<input checked="" type="checkbox"/>	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






<input type="checkbox"/>	Active	Role Name	Role Area	Scope	Parameters	Status Date	
1 <input type="checkbox"/>	<input checked="" type="checkbox"/>	Acquisitions Administrator	Acquisitions	University of Illinois at Urbana-Champaign (UIU) –Champaign and Urbana, IL	-	12/19/2011	...
2 <input type="checkbox"/>	<input checked="" type="checkbox"/>	Analytics Administrator	Miscellaneous	University of Illinois at Urbana-Champaign (UIU) –Champaign and Urbana, IL	-	09/03/2017	...
3 <input type="checkbox"/>	<input checked="" type="checkbox"/>	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

User Roles

1 - 1 of 1

[+ Add Role](#) [+ Add from Profiles](#) [- Remove Selected](#)  

<input type="checkbox"/>	Active	Role Name	Role Area	Scope	Parameters	Status Date	
1 <input type="checkbox"/>	<input checked="" type="checkbox"/>	Patron	Fulfillment	University of Illinois at Urbana-Champaign (UIU) –Champaign and Urbana, IL	-	12/17/2011	

[< Back to Alma](#)



Alma Configuration Sandbox

Configuring

University of Illinois at ▼

Acquisitions

Resources

Discovery

Fulfillment

User Management

General

Filter List



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	<div data-bbox="1064 582 1555 658"><input type="text" value="Look-up or select"/></div> <ul data-bbox="1064 658 1555 1062" style="list-style-type: none">BlockOverride By AllOverride By ManagerOverride By OperatorHandle Automatically	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	

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

Bon Voyager!



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