Welcome!

Office Hours will start at 2pm and run until 3pm.

Please mute your microphone.

As time permits, we will respond to questions typed in the chat box, and offline afterwards, as needed.

This session will be recorded and made available on the CARLI website. Slides and references for today are available at https://www.carli.illinois.edu/carli-alma-primo-ve-open-office-hours-43

Agenda – 7/13/2023

- Announcements and Reminders

- Today's Topic: Named Users in Alma

Reminders

For upcoming Alma/Primo VE events and learning opportunities, see the CARLI Calendar: https://www.carli.illinois.edu/calendar

For the latest news in and around CARLI, see the June 28th edition of the CARLI News here:
https://www.carli.illinois.edu/carli-news-june-28-2023

Webinars and Recordings

- Ex Libris hosts several [free webinars](#) each month!
- Most past Ex Libris Webinars can be viewed On Demand
  - [Alma webinars](#)
  - [Primo VE webinars](#)

- Most CARLI webinars and events are recorded and available from our website:
  - These [Office Hours](#)
  - CARLI [Technical Services Q&As](#)
  - CARLI [Primo VE webinars](#)
  - etc.

I-Share Annual Statistics Package

- Download these data from the CARLI Files server before the end of August

- For a full description of the annual statistical package, see https://www.carli.illinois.edu/products-services/i-share/stats/almastatspck and/or watch the recording of the July 22, 2021 and January 12, 2023 Office Hours

Named Users in Alma

- What are Named Users?
- Why are Named Users important to review and manage?
- What are best practices for Named Users?
- How do I know who's a Named User?
- How do I clean up Named Users?
- What are shared Generic user accounts and when should they be used?
- How do staff log in to Alma if the campus single sign-on goes down?

CARLI's Named User FAQ:

https://www.carli.illinois.edu/products-services/i-share/user-management/nameduserFAQ

Named Users in Alma are:

- **Active** user records in Alma that have been assigned any role that *can log into Alma*.
  - Includes all roles *except* Patron, Instructor, and/or Trial Participant

Named Users counts are NOT affected by:

- Total number of patron/user records in your IZ

- Whether staff logins are managed internally in Alma or externally via SIS

- What system your library uses for single sign-on

- Ex Libris' Alma pricing is based on
  - Bibliographic title count
  - E-journal count
  - Alma "Named User"

CARLI's license for Alma permits us a fixed number of Named Users across all I-Share institutions and the CARLI Office staff.

If the number of Named Users across all I-Share institutions is over our contracted limit, this may result in additional license fees.

- CARLI's *consortial* Alma contract allows for 2298 active Alma Named Users
  - As of 7/13/2023, we have 3020 active Named Users

- There are not specific named user limits for each I-Share library
  - Our contract is for the consortium as a whole
  - Ex Libris provides neither the price nor the pricing metrics at an individual library level
  - Each I-Share institution should have as many active Named Users as they require to operate securely but should have no more active than they need.
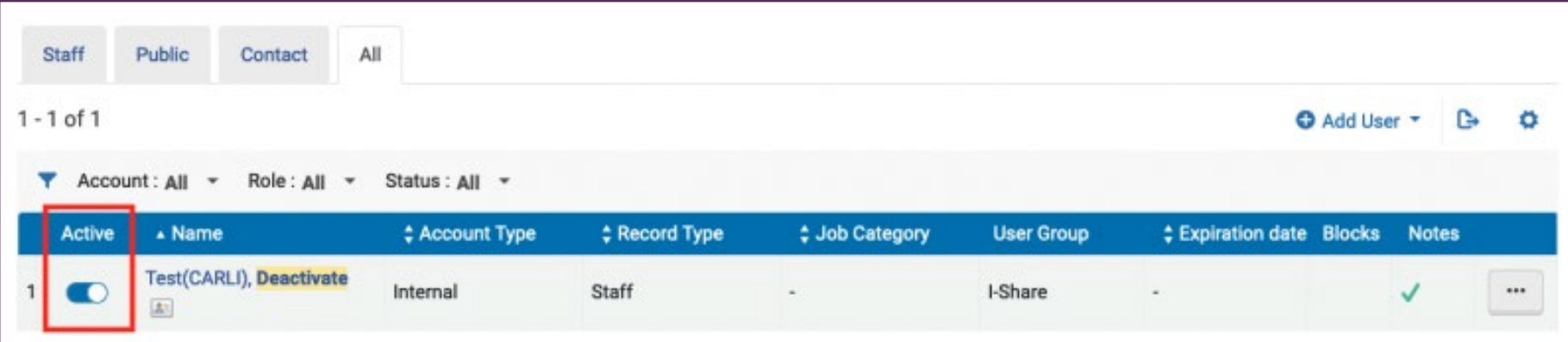
CARLI
I-Share

Questions to consider…

- How many staff need to log in to Alma to perform their regular job duties?

- How many service points does your library have for which you can create generic user accounts, especially for student workers? For example, a service point such as a circulation desk computer where the login is specific to the workstation rather than the individual worker?

- Which tasks should be associated with a specific user vs. which tasks may be safely associated with a generic user?

- Are there staff who only log in to Alma infrequently, and for what purpose?

1. Create generic user accounts for shared use
   a. Student workers
   b. Library staff
2. Use CARLI's Alma Sandboxes for testing
   a. Contains a copy of live, anonymized data that is refreshed 2x/year
   b. Great alternative for testing configurations and integrations
3. Create an internal Alma user as a backup in case SSO is offline
   a. User should have Alma Administrator privileges
   b. Limit to 1 or 2 per institution
   c. Create test user account in Alma IZ as a last resort

4. Establish local clean-up procedures when staff or student workers leave
   a. Revisit at the end of each semester
   b. Students - remove Alma staff roles
   c. Staff - account can remain active with patron role, if needed
   d. Purge user records - Do NOT delete
5. Review all Named Users at least once per year
   a. Use Alma's Staff Login Report and Analytics reports to:
      i. Remove roles no longer needed
      ii. Deactivate staff users no longer associated with your institution
      iii. Purge users no longer associated with your institution

- Staff Login Report
    - Alma Configuration > General > General Configuration > Staff Login Report
    - Lists all "active" Named Users
    - Shows the last login date in the past 90 days
    - Shows a dash if the user has not logged on in 90+ days
- Analytics Reports written by CARLI
    - Shared Folders > Carli NETWORK 01CARLI_NETWORK > User Management Reports
    - Named Users to Match Staff Login Report
    - Named Users List with Roles

CARLI
I-Share

- https://www.carli.illinois.edu/products-services/i-share/user-management/DeactivateNamedUsers
- Alma > Users > search for named user
  - ➢ **Do not** deactivate the admin user named "Alma Administrator" or any users where primary identifier starts with carli_ , exl_, or rialto_
- Option 1: If user is no longer needed at all, toggle "active" user to deactivate

- Option 2: Remove Alma roles for user
  - Edit the user's record
    - Select a specific role, click ellipsis button for the role, choose "Remove"
    - Or use check boxes to left of the role to select multiple roles
      - Click the "remove selected" option to remove all roles
  - Scroll to top of page and Save changes to the user roles

BEST PRACTICE RECOMMENDATIONS FOR NAMED USERS

1. Create generic user accounts for shared use
   a. Student workers
   b. Library staff
2. Use CARLI's Alma Sandboxes for testing
   a. Contains a copy of live, anonymized data that is refreshed 2x/year
   b. Great alternative for testing configurations and integrations
3. Create an internal Alma user as a backup in case SSO is offline
   a. User should have Alma Administrator privileges
   b. Limit to 1 or 2 per institution
   c. Create test user account in Alma IZ as a last resort

Questions to consider…

- How many staff need to log in to Alma to perform their regular job duties?

- How many service points does your library have for which you can create generic user accounts, especially for student workers? For example, a service point such as a circulation desk computer where the login is specific to the workstation rather than the individual worker?

- Which tasks should be associated with a specific user vs. which tasks may be safely associated with a generic user?

- Are there staff who only log in to Alma infrequently, and for what purpose?

Best Practice Recommendations for Creating Generic Shared User Accounts in Alma for I-Share

https://www.carli.illinois.edu/products-services/i-share/user-management/GenericUsers

https://www.carli.illinois.edu/products-services/i-share/user-management/BackupAdminUser

- Institutions that login to Alma with single sign-on can create a back-up administrative account that may be used when their single sign-on service is offline or unavailable for an extended period of time.

- Use the backup-up administrative account to:
  - Temporarily toggle certain Alma staff user accounts from External to Internal so that library staff can log into Alma

- Note: A different URL will need to be used to log into Alma for an Internal user than when logging in via single sign-on.

CARLI
I-Share

- After the single sign-on service is available again:
  - Library staff accounts should be re-toggled back to External
  - Staff should go back to logging in with single sign-on.
- Considerations for the Back-Up Admin account:
  - This account should be created, maintained, and documented by your library's I-Share liaison, library's Security Contact, library's Technical Liaison, or someone in a similar role.
  - Share the Username and Password for this account with select library staff responsible for determining when user accounts would need to be toggled during an extended outage.
  - This shared account should not be logged into Alma by two or more people simultaneously as it may cause data errors.

CARLI
I-Share

- Please refer to CARLI's [Best Practice Recommendations for Back-Up Admin Accounts in Alma for I-Share Institutions using Single Sign-On](#) page for specific steps on:

  - How to create the Back-Up Admin user for your institution
  - When and how to toggle user accounts with the Back-Up Admin account.

Questions?

Join us August 10, 2023 at 2pm for another Office Hour.

Contact CARLI at support@carli.Illinois.edu