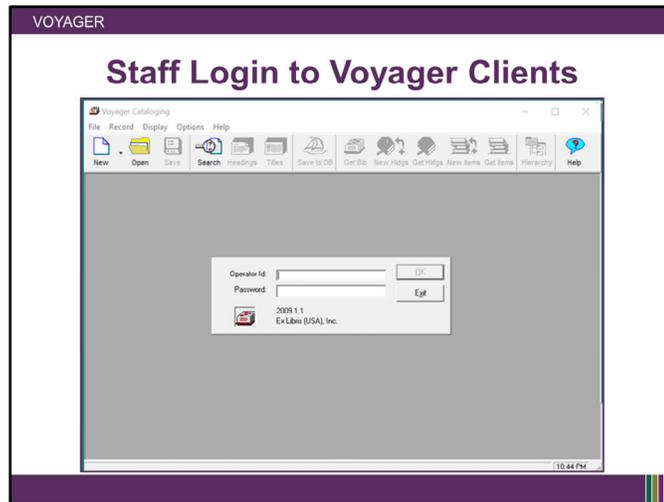




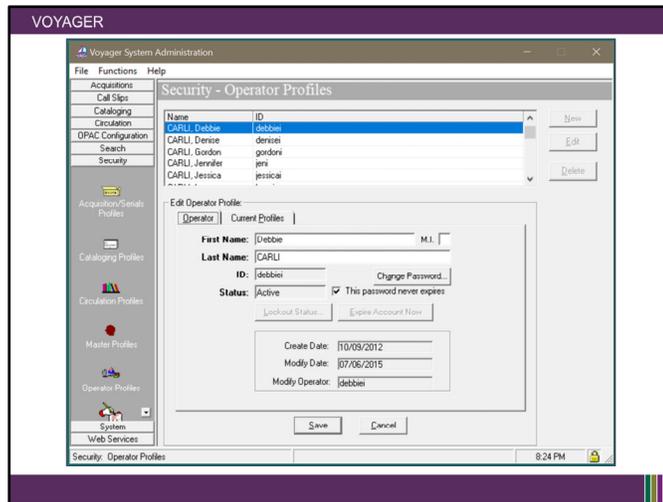
Hello everyone! This is Debbie Campbell from the CARLI office and in today's Open Office Hours, we're going to talk about Alma Users and their Roles. We've received several questions about this topic at CARLI Support as you've all begun thinking about the next phase in our Migration, Phase 2, when you can begin to make changes to configuration that will persist into our production environment.

With this hour, we'll get a start on this topic, introduce methods to streamline staff user role management in Alma, share links to documentation and videos for your review, and introduce what to expect in next steps as Migration Test Phase 2 begins next week on 11/6.

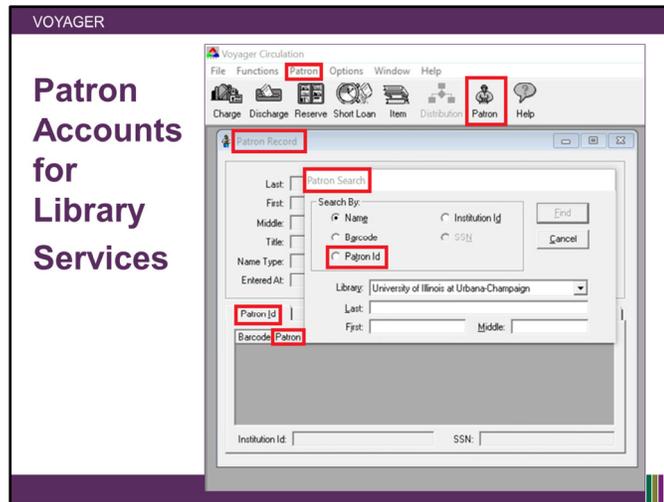
So when thinking about a picture to make this slide feel more seasonal, I decided to include this leafy street because I'll begin by setting up a crosswalk for us between how we're used to working in Voyager, and how the functionality is set up in Alma.



Let's begin by thinking about how we, as library staff, log into the Voyager clients that we use. We have a username and password, that for many of us, is a distinct username and password that we use only for Voyager. Our staff-specific usernames with higher level privileges allow us greater accountability. Our libraries may also use a few generic usernames and passwords, such as one shared by multiple circdesk or cataloging student workers.



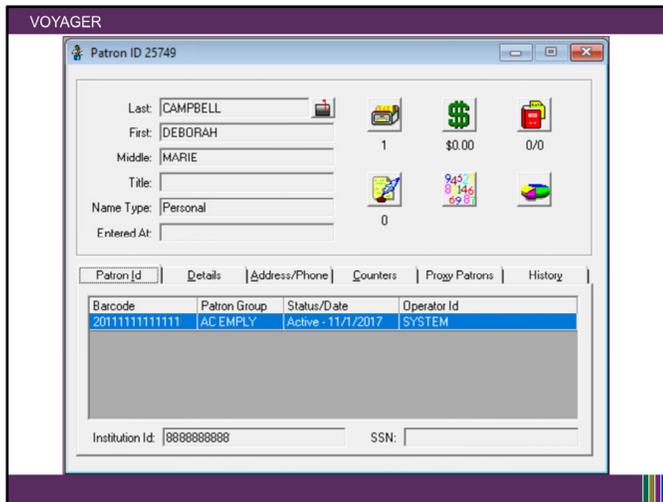
The term Voyager uses for this version of our self is “Operator ID”. Our login was created for us by one of our library’s Voyager System Administrators in the Security> Operator Profiles section of System Administration. They entered our name, operator ID username, and password to create our Voyager staff accounts. The System Administrator then also assigned our Voyager Operator ID to one or more client profiles- we’ll look at this in a few slides.



As library patrons, we also have a separate record saved in Voyager that we use for our Voyager circulation transactions.

This patron record does not have anything to do with our Voyager login as it only represents us as library patrons.

In Voyager, the term "Patron" is used heavily to describe these records, as you can see by how many times I've highlighted it in this screenshot of the Voyager Circ Patron Search window.



Here's a quick glance at a sample Voyager patron record. The term "Patron" does describe this record's purpose accurately; this record is used by Voyager only for circulation and resource sharing activities.



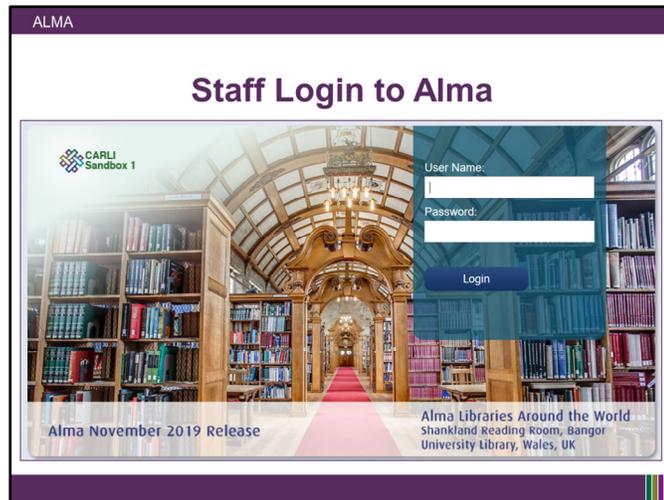
Only library staff ever interact directly with Voyager. Library patrons interact via the library catalog.

The CARLI Office supports 3 front-end interfaces to Voyager: WebVoyage Classic Search, VuFind 0.6, and New VuFind. Libraries have chosen a primary version of the catalog to present to their patrons.

With WebVoyage, the only login option is the patron's barcode and last name as found in Voyager. For VuFind 0.6, patrons had to create their own username and password; this username needed to be unique across all users in all I-Share libraries, and as such, often did not match the username the patron used for their home institutions logins.

New VuFind is more modern with the option to login using authenticated campus credentials, or, patron's barcode and last name if the library did not set up campus authentication.

All of these Voyager pieces are interconnected, but, not really streamlined.



Switching to Alma: Like how our library patrons never interact directly with the Voyager software now, they will also never interact directly with Alma. A non-library-staff-patron's interactions will only be through Primo VE.

Alma uses one "User" record to manage all of the parts of our Alma-integrated identities.

Non-library-staff users will not have access or permissions for Alma itself. But, their Alma User record tracks their circulation transactions and provides their PrimoVE username and password.

For library staff members, our login to our Alma environments- including the permissions we have for working in the system, our records Alma uses for our circulation transactions, and our PrimoVE usernames and accounts are all interconnected way more in Alma than in Voyager, and are all based on the same "User" account in Alma.

## ALMA

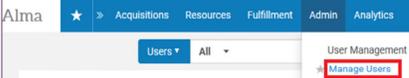
### User Accounts in Alma

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



The screenshot shows the Alma Basic Search bar. The 'Users' dropdown menu is highlighted with a red box, and the 'All' option is selected.

- Admin menu> User Management> Manage Users



The screenshot shows the Alma Admin menu. The 'User Management' section is expanded, and 'Manage Users' is highlighted with a red box.

- Fulfillment menu> Manage Patron Services



The screenshot shows the Alma Fulfillment menu. The 'Manage Patron Services' option is highlighted with a red box.

There are multiple ways to search for a User account in Alma.

From the Alma Basic Search Bar> choosing Users from the drop-down

From the Admin Menu> selecting Manage Users under the User Management section.

And from the Fulfillment Menu> selecting Manage Patron Services

If you search by either of the first two options, clicking the patron's name from the results will open directly to the "User Details" screen that we'll see on the next slide.

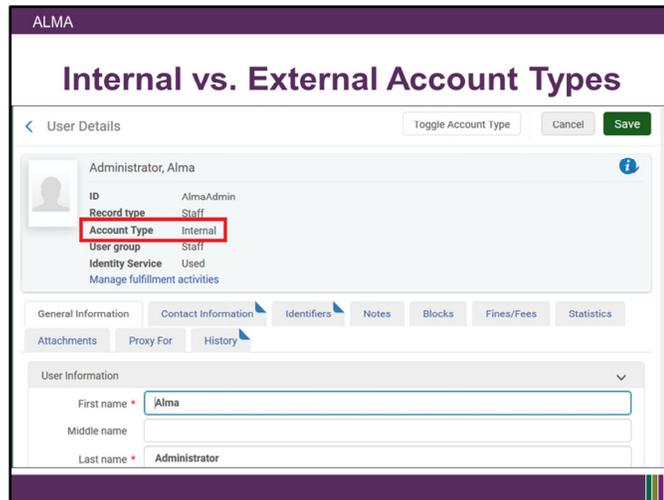
If you search using the Fulfillment menu's Manage Patron Services, clicking on the patron's name opens ready for you to conduct circulation aka fulfillment transactions. Click on the patron's ID to navigate back to their User Details, and then to the General information tab for the view on the next slide.

The screenshot displays the 'User Accounts in Alma' interface. At the top, the title 'User Accounts in Alma' is centered. Below the title, there is a navigation bar with a back arrow, 'User Details', 'Toggle Account Type', 'Cancel', and 'Save' buttons. The main content area shows the user profile for 'Administrator, Alma'. The profile includes a placeholder for a profile picture and an information icon. The user's details are listed as follows:

|                  |           |
|------------------|-----------|
| ID               | AlmaAdmin |
| Record type      | Staff     |
| Account Type     | Internal  |
| User group       | Staff     |
| Identity Service | Used      |

Below the details, there is a link to 'Manage fulfillment activities'. A horizontal menu contains tabs for 'General Information', 'Contact Information', 'Identifiers', 'Notes', 'Blocks', 'Fines/Fees', and 'Statistics'. Below this menu, there are tabs for 'Attachments', 'Proxy For', and 'History'. The 'User Information' section is expanded, showing three text input fields: 'First name' with the value 'Alma', 'Middle name' which is empty, and 'Last name' with the value 'Administrator'.

Note that, whereas Voyager was heavy on the term “Patron”, Alma terminology is for “User.” We’ll all work towards getting used to this change in terminology when referencing Alma settings. This change in terminology is because of the combined purpose for these User records. We’ll see more on this shortly.



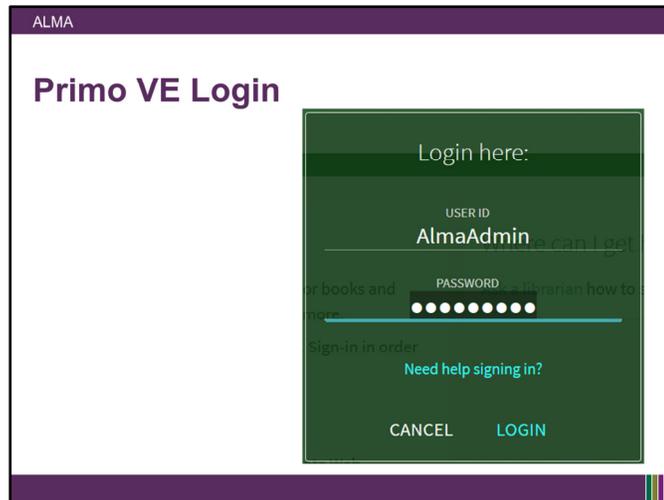
In Alma, a user account can be one of two “Account Types” Internal, or External.

External user accounts synchronize to an external system, such as a Student Information System or other such registration database, for the account information. This information includes the primary identifiers that are used as the login username for Alma and Primo VE, and the password. This makes it possible for staff to log in to Alma with their campus username/password, and for staff and patrons to log into Primo VE using their campus username and password as well. No more separate logins to remember!

For users where the account is set to internal, the patron information is entered directly into Alma and managed in Alma. This includes the primary identifiers that are used for the Alma and Primo VE login username, and the user’s password as well. When staff create an internal user record, they can set the account to prompt the user to change their password upon first login for more security.

Upcoming office hours and shared documentation will discuss external user account setup and synching with your campus systems in more detail.

In contrast with Alma, While some libraries currently do use Voyager’s Patron Batch Load Functionality to upload patron datasets from their campus registration system, Voyager does not distinguish between batch-loaded and manually created patron types like Alma does.



The Alma user record contains primary identifiers that serve as the user's USER ID for logging into Primo VE, the front-end discovery interface we will use with Alma.

If the user has an External record- their login for Primo VE will be the same login used for all authenticated campus services.

For Internal patrons- the User ID is a primary identifier in the user's account, and the password is recorded in Alma.

## Patron and User Accounts Summary

### Voyager

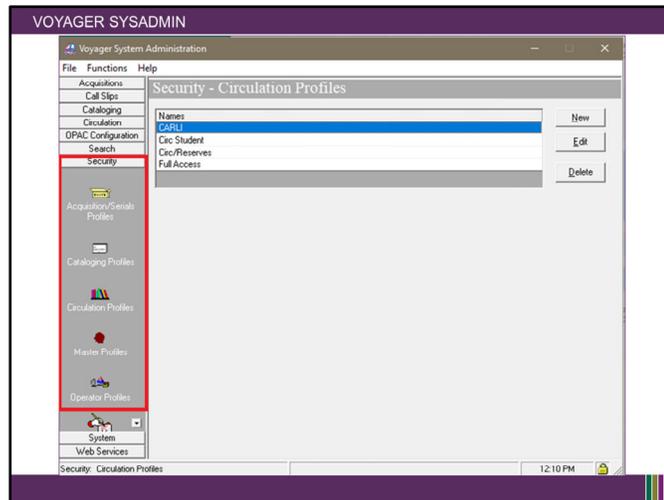
- Login to clients is not associated with staff member's other accounts.
- OPAC account is affiliated with Voyager patron account; additional username/password may be required.
- Patron records are used only for circulation transactions.

### 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."

This slide summarizes Patron and User accounts in Voyager and Alma, specifically thinking about what library staff will experience.

So now that we've reviewed how the user account and patron record are different between Voyager and Alma, let's refresh on how library staff are assigned their permissions to work within the staff clients in both systems.



In Voyager System Administration, there are 4 main categories for security profiles, one for each major functional area aka Voyager client.

Those are: Acquisitions/Serials, Cataloging, Circulation, and the Master Profiles. Master Profiles grant access to the System Administration settings themselves.

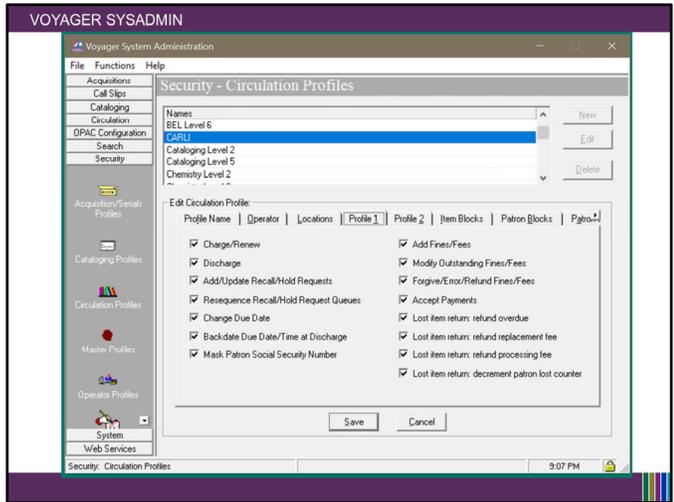
Within each functional area's security profile section, the library creates profiles.

Each profile is associated with a specific set of privileges within that client.

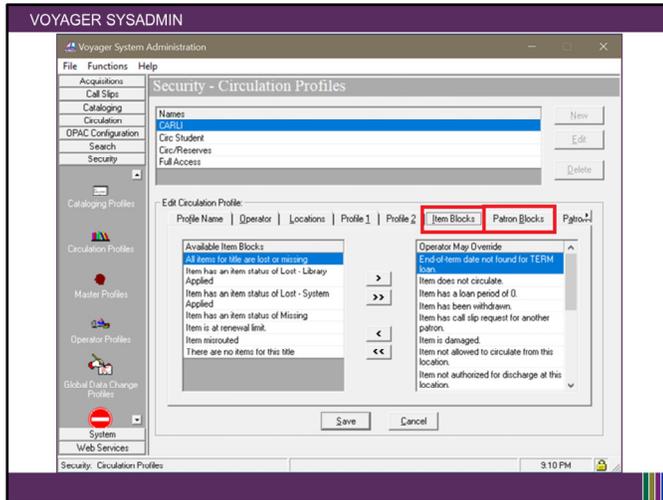
On this screen, we can see that the library has 4 Circulation profiles set, including our default for CARLI Office staff.

This would be similar for all of the functional areas- often these profiles are named for the associated staff members' positions within the library. So within Circulation, this example has a Full Access, a Circ/Reserves profile, and a Circ Student profile.

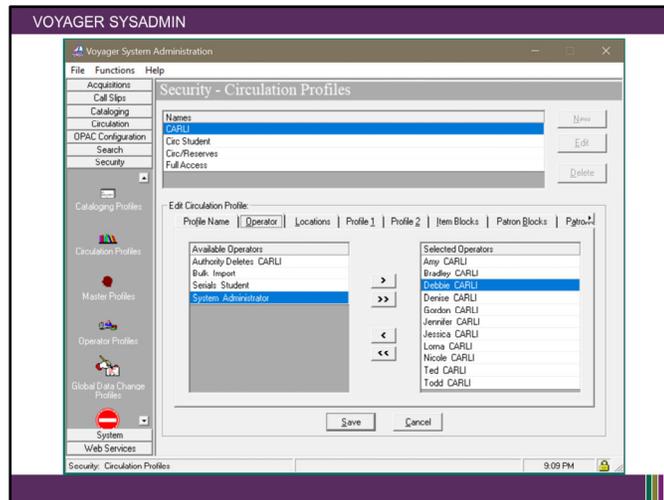
As another example, for Cataloging, a library might set a Cataloging Supervisor profile, Cataloging Staff, and Cataloging Student profile, each with varying levels of responsibility and permission.



Each profile had its own set of enabled permissions, selected granularly from a cafeteria style menu containing the total permissions within the functional area.



The Circulation security profiles in Voyager also contain the settings that allow library staff to perform overrides for exceptional transactions. When creating the security profiles, the Voyager system administrator selected which scenarios staff members assigned to this profile should be able to override.



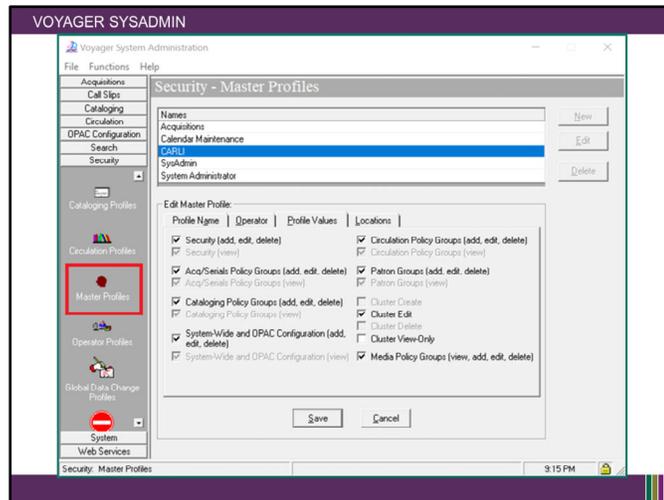
And back on the Operator tab for the profile, staff Operators are assigned to only ONE profile per functional area.

So, if my username is listed for the CARLI Circulation profile, I cannot also be listed for the "Circ Student" Circulation profile.

To have different permissions than any of my colleagues, I would need to be assigned to a different Circulation Security Profile, with my applicable permissions set.

Some library staff member's may only be assigned to a single security profile, such as only a Circulation profile.

Other staff with a broader job description or areas of responsibility, may be assigned to a profile for each functional areas of Voyager.



Finally for Voyager, the Master security profiles are what give staff permission to make changes to Voyager System Administration itself, and therefore, to Voyager.

Note that Voyager has the option for Read Only the settings in SysAdmin. The ability to see the settings but not make changes can be very helpful so that you can allow colleagues to see how things are currently set, and to review/discuss those settings, but, then you can give a few selected individuals at your institution the responsibility for making the actual edits. Voyager System Administration does not have a built-in change log; so only those with knowledge, experience, an understanding of nested dependencies, and who know when to ask questions, should have editing access.

In Alma, the Configuration settings are analogous to Voyager System Administration. Alma Configuration is where you make changes that affect your institution's overall settings. Like Voyager SysAdmin, Alma also has the ability to set many "Administrator" permission roles to "Read Only". This will be a useful option for your institutions as we move forward. Only those with knowledge, experience, an understanding of nested dependencies, and who know when to ask questions, should have editing access in Alma Configuration as well. Ex Libris's Certification process was created to establish a baseline of knowledge for those who will have access to the configuration settings. Like Voyager, there is no change log built into Alma configuration, and no "undo" button.

## 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.

Think back 4 slides to that screenshot of Voyager SysAdmin that showed a cafeteria style menu of permissions. Ex Libris has simplified the process by combining the overall laundry list of all possible individual privileges into what are called “Roles” in Alma. Roles are predefined sets of privileges that allow users to perform actions within Alma.

Library staff are granted permissions in Alma by assigning one or more “Roles” to their User Account.

The links on this slide are for Ex Libris documentation where you can review a list of the roles available in Alma, and read more about each role’s component privileges. You cannot adjust which privileges are assigned to which roles.

Two roles allow Alma Users the ability to assign roles to other Alma Users. Those two roles are “User Administrator” and “User Manager.”



The Roles for each area are often named for their typical operational level and specialty. For example, the available Fulfillment-specific roles are on this slide.

Notice how there are some roles that occur in sets of increasing responsibility- like Circ Desk Operator-Limited, Circ Desk Operator, and Circ Desk Manager, and there are some roles that stand alone- like Patron.

The naming conventions for roles are consistent:

**Administrator** roles can make configurations, but usually do not have access to the rest of the functionality.

The other roles can make operational changes, but usually can't change configurations.

The **Manager** role has full privileges to the operational functions.

The **Operator** roles have only the privileges needed for day-to-day operations, in the varying levels.

**Operator Limited** means more restricted permissions, often appropriate for library student workers.

**Operator Extended** usually means this operator can additionally delete things: like orders, or bib records.

Most library staff will likely need a combination of roles to be able to do all of their tasks, and the roles may come from a variety of functional areas.

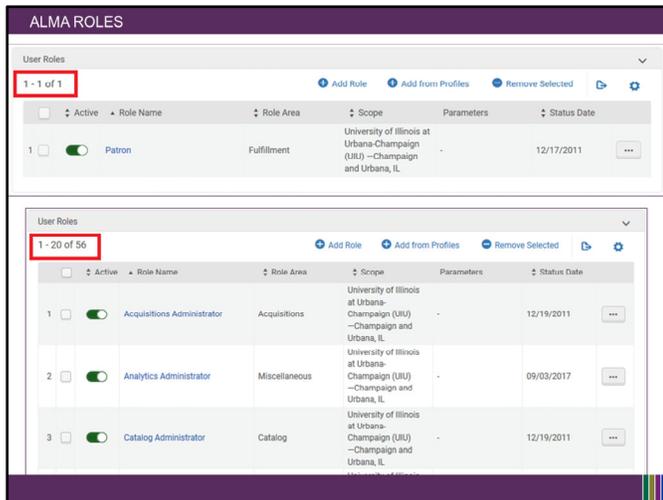
## Ex Libris Documentation on Users

- [Managing Users in Alma](#)
- [Managing User Roles](#)
- [Alma Essentials Video: Day-to-Day User Management](#)
- [Alma Certification Video: User Roles](#)

This slide lists some additional documentation on managing Alma Users and User Roles for your later review. When the slides are posted, they will contain hyperlinks.

The screenshot displays the 'ALMA ROLES' interface. At the top, there is a navigation bar with 'CARLI Sandbox 1' and 'Alma Sandbox' logos, and a menu with 'Acquisitions', 'Resources', 'Discovery', 'Fulfillment', 'Admin', and 'Analytics'. Below this is a 'Users' dropdown menu set to 'All'. The main content area is titled 'User Details' and shows a profile for 'Smith, John'. A summary table lists: ID (jrsmith), Record type (Public), Account Type (Internal), and User group (Undergraduate S...). Below the table are tabs for 'General Information', 'Contact Information', 'Identifiers', 'Notes', 'Blocks', 'Fines/Fees', 'Statistics', and 'Attachments'. The 'Identifiers' tab is active, showing a 'User Information' form with fields for First name (John), Middle name (R.), Last name (Smith), Preferred first name, Preferred middle name, Preferred last name, Primary identifier (jrsmith), Title, PIN number, Job category (Please select a value), Job description, and Gender.

So in Alma, after you search for a user's record and retrieve their User Detail information, to see which roles they have applied...

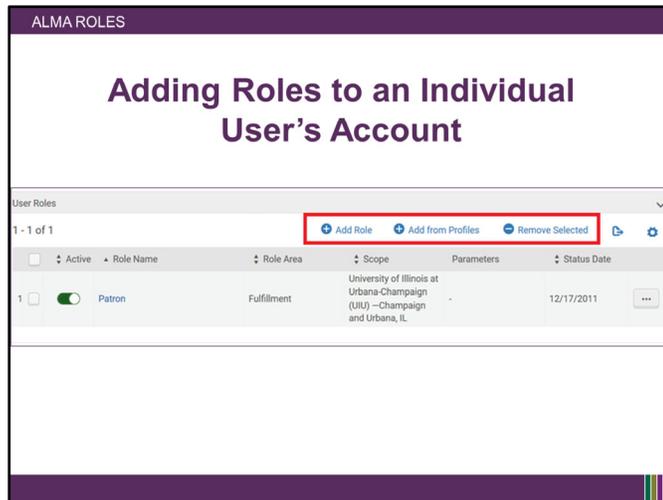


You then scroll down to the bottom of the screen to the User Roles section.

I have copied the Roles section from two sandbox users on this slide-

The one at the top is from an undergraduate at the institution who does not work at the library- you can see that user has only one "Role" in Alma- that of Patron.

The screenshot at the bottom is from a user who is a library staff member with a lot of responsibility; they have 56 roles assigned to their user account, including many administrative roles.



If you have completed Alma Certification, and if your library decides that you should be one of the Alma “User Administrators” or Alma “User Managers,” you’ll have the permissions needed to be able to assign roles to other library staff members in Alma. You’ll see the Add Role, Add from Profiles, and Remove Selected options.

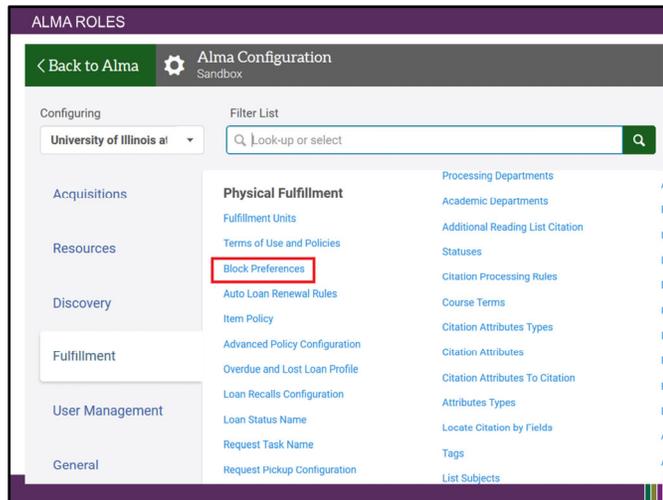
While other staff will be able to review which roles a user account has, only the User Administrators and User Managers can adjust the roles.

Roles can be added individually using the “Add Role” option. Or, you can add a pre-defined set of roles to a user’s account simultaneously, using the “Add from Profile” option.

Here in a moment, Laurie from Ex Libris will present on several options for streamlining the application of roles to user accounts.

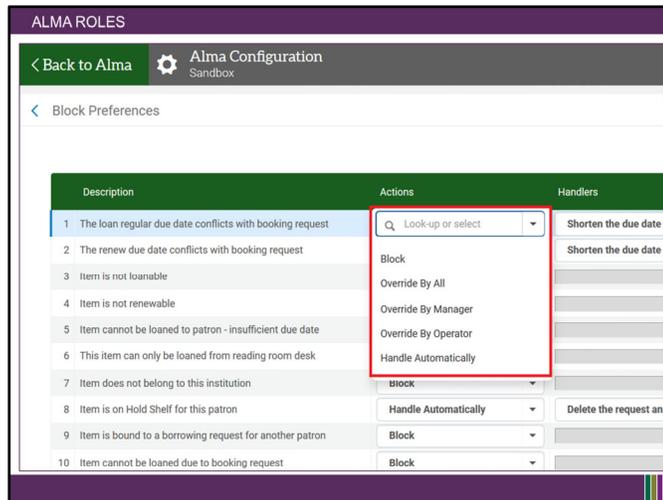
Keep in mind that, while your individual staff members will need and want relevant roles applied to their individual accounts during our test period so that they can test their day-to-day workflows in Alma, at the end of the test phase, all of our individual accounts will be wiped from Alma in preparation for the production data re-load. While individual user accounts will be erased, the configuration settings persist from test load to production load. So, unless your library staff is very small, you don’t want to labor over manually applying roles one at a time to individual user’s accounts during the test period. Instead, your library will want to create role profiles in the Alma Configuration, and learn about the other methods to streamline re-applying roles to library staff user accounts for production go-live next June.

One quick flashback to Voyager SysAdmin before I hand the presentation over to Laurie.



Remember that in Voyager, you set which circulation-related blocks a staff member could override in the security profiles.

Alma assigns the blocks that staff can override more holistically than Voyager. This screenshot is showing the Alma Configuration > Fulfillment > Physical Fulfillment options, where I have the Block Preferences section highlighted.



Block preferences in Alma are set to correspond to the Circulation Desk roles, and their permission levels.

Your library made some initial decisions on these settings in your Configuration forms, but, as you work with roles and workflows in Alma, you'll be able to make adjustments.

The override level options for specific blocks are:

**Block**- which means an override cannot be performed.

**Override by All** can be overridden by any staff member with the Circulation Desk Manager, Circulation Desk Operator, or Circulation Desk Operator–Limited role, at the current circulation desk.

**Override by Operator** can be overridden only by a staff member with the Circulation Desk Manager or Circulation Desk Operator role at the current circulation desk.

**Override by Manager** can be overridden only by a staff member with the Circulation Desk Manager role, at the current circulation desk.

And for some, the block can be handled automatically with a specified action as the result.

## 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.

This slide summarizes some key points we've discussed about library staff permission assignment in Voyager and Alma.

## Streamlining the Process

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

I'll now hand over the presentation to Laurie from Ex Libris, to present on methods for streamlining the role assignment process.

[Hand presentation over to Laurie]

[When Laurie is finished, Debbie will finish presenting slide 29-end]

**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

So on November 6 the CARLI Office is planning to announce that Phase Two has begun and the I-Share libraries can begin making data and/or configuration changes in your Alma testing environment.

In preparation for Phase 2, the CARLI Office will be in touch with each I-Share's library's Alma-Primo VE contact. Since working with roles and profiles requires Alma Certification, the documentation provided, the workflows outlined, and the worksheets presented will differ, depending on the status of the library's Alma certified staff.

If you are the Alma-Primo VE contact for your library, keep an eye on your inbox and please feel free to send any questions to CARLI support.

*Thank you!*

Join us next Thursday  
at 2pm for another  
Office Hour



You can always contact CARLI at [support@carli.illinois.edu](mailto:support@carli.illinois.edu)