Managing User Roles for Summit Processing

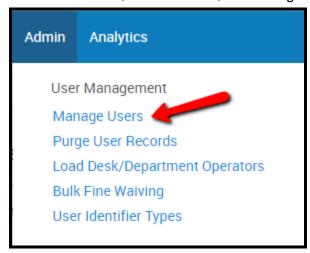
Adding Roles to an Individual User Account

To configure user roles, you must have one of the following roles:

- User Administrator
- General System Administrator
- User Manager

Open Alma

From the side bar, select Admin, and then go to Manage Users under User Management.



Go to the staff tab and select a user. Click on the ellipsis to edit.



Depending on the circumstances, you may need to create a new user. If this is the case, select **Add User** above the list of names. This options bring up the same screen. The difference is that adding a user, you will have to enter the additional user data before adding roles.



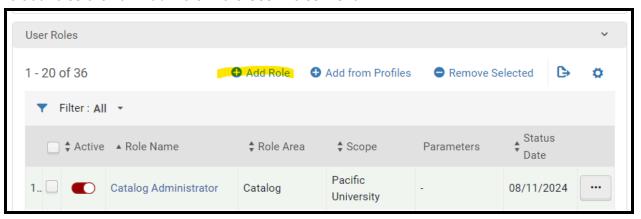
Roles required for basic Summit processing:

- Fulfillment Services Operator
- Requests Operator

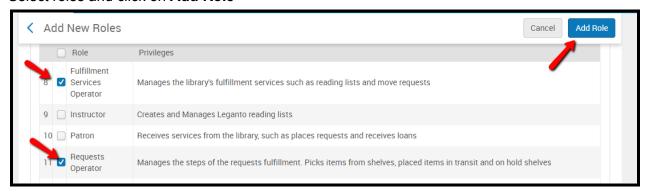
Roles that allow higher-level processing and troubleshooting:

- Circulation Desk Operator
- Physical Inventory Operator

To add roles click on **Add Role** in the User Roles menu



Select roles and click on Add Role



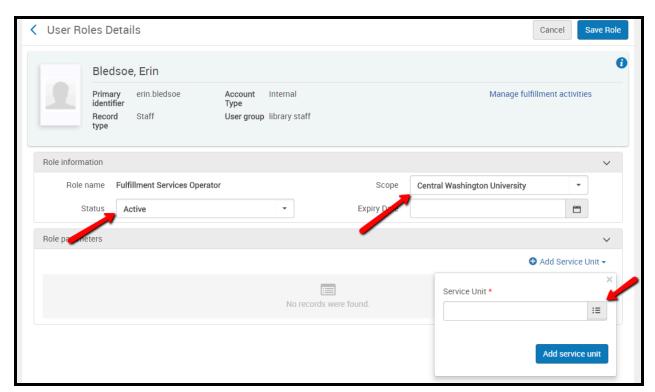
The selected options will appear in a list below the users information. To edit one, including adding the scope or parameter, click on the ellipsis and select **Edit**.



Roles need to be added for each resource sharing library that the user is processing from. For example:



The Request Operator, Fulfillment Services Operator, and Circulation Desk Operator Limited will need to have a scope and a circulation desk. If you have branch campuses or multiple libraries that process summit, an individual profile will need multiple request operator roles to process requests from multiple libraries.



Select Save Role when done.

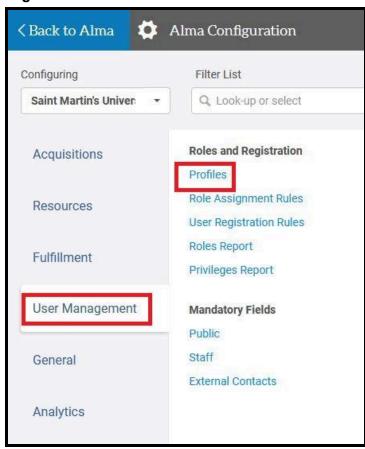
Save the user profile when all roles are added and modified per your institution's needs.

*Remember that the user will need to log out and log back in for the roles to be active.

Creating a Profile

If you are adding and removing roles on a fairly regular basis (ex: student workers) then you can create a profile for those roles in order to add them all to a patron record at one time.

Open Alma Configuration and go to **Profiles** under **User Management > Roles and Registration**



In the Profiles list, check to see if the profile you need already exists, and if not, choose **Add Profile**



Name your profile, then click Save and Continue

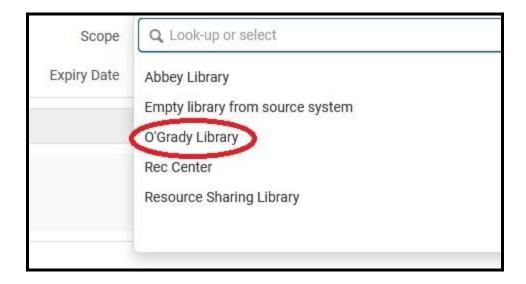
Choose Add Role

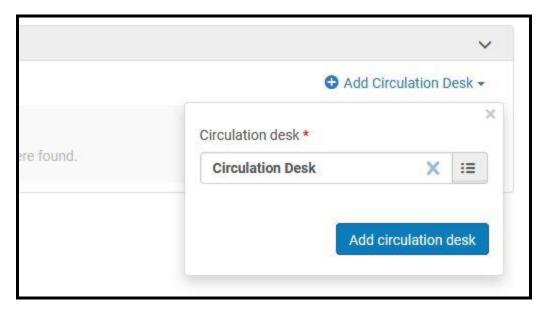


Choose the roles to add for the employees who will use this profile. You can add more than one at a time by checking the boxes next to all that you want to apply. Click **Add Role**

Roles may default to inactive, especially if they require a scope or a circulation desk - choose edit from the menu on each role and turn the status to **Active**.





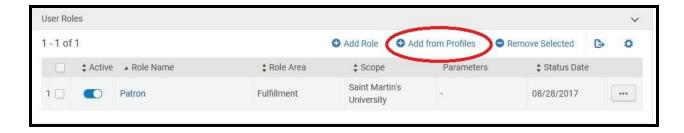


When you've finished, click Save Role

Note:

- You need to assign a scope and circulation desk to most roles.
- If the role needs to apply to multiple locations, you will need to add it for each location and assign different scopes/circulation desks to it each time.

To use your profile to assign roles inside the user account, choose **Add from Profiles** instead of **Add Role** in the User Roles menu.



Choose the profile you created, and all of the roles will be added at once.