

Managing User Roles for Summit Processing

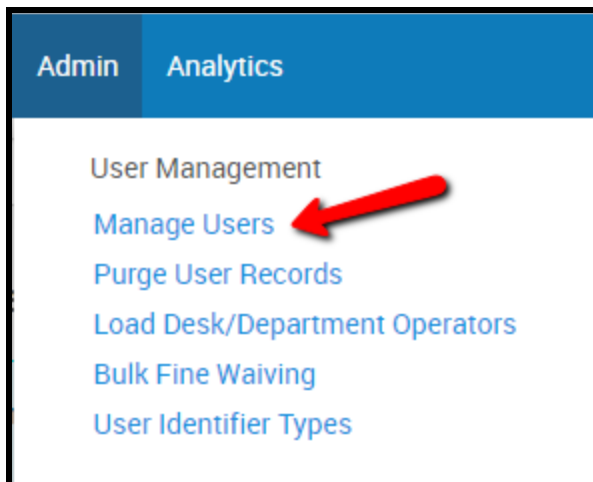
Adding Roles to an Individual User Account

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

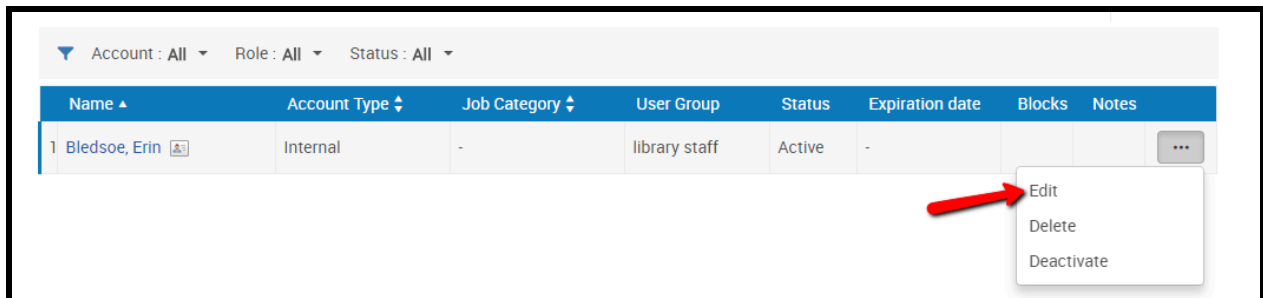
- User Administrator
- General System Administrator
- User Manager

Open Alma

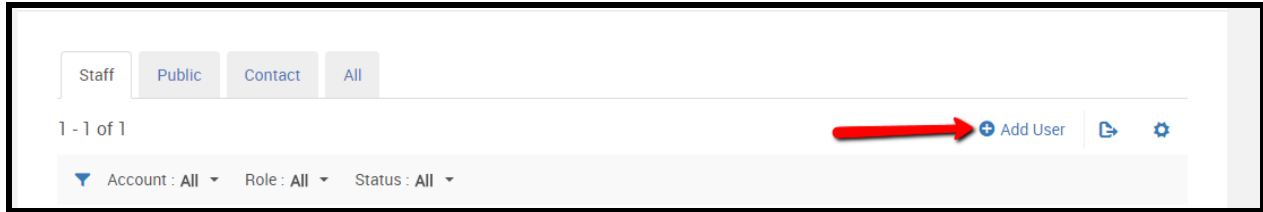
From the side bar, select **Admin**, and then go to **Manage Users** under **User Management**.



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.



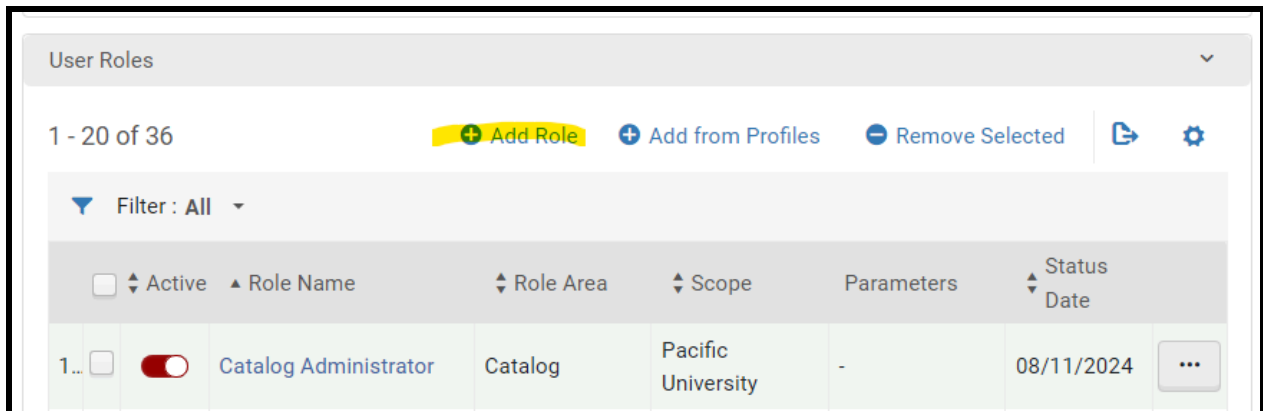
Roles required for basic Summit processing:

- Fulfillment Services Operator
- Requests Operator

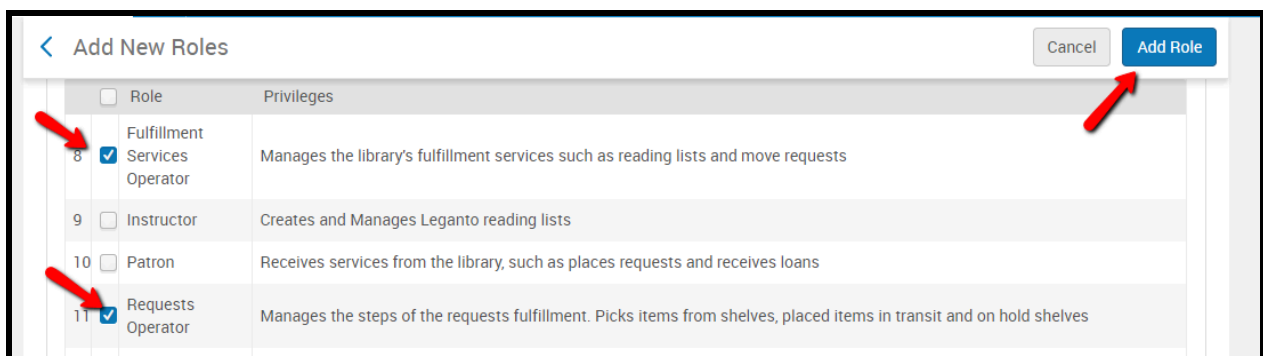
Roles that allow higher-level processing and troubleshooting:

- 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**.

5	<input type="checkbox"/>	<input type="checkbox"/>	Fulfillment Services Operator	Fulfillment	-	-	12/06/2017	...
6	<input type="checkbox"/>	<input checked="" type="checkbox"/>	Fulfillment Services Operator	Fulfillment	Brooks Library	-		<ul style="list-style-type: none"> Edit Remove View hidden
7	<input type="checkbox"/>	<input checked="" type="checkbox"/>	Fulfillment Services Operator	Fulfillment	Central Washington University	-		

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

<input checked="" type="checkbox"/>	Requests Operator	Fulfillment	Hannon Library	Circulation Desk
<input checked="" type="checkbox"/>	Requests Operator	Fulfillment	Resource Sharing Library	Resource Sharing Desk

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 submit, an individual profile will need multiple request operator roles to process requests from multiple libraries.

< User Roles Details
Cancel **Save Role**

Bledsoe, Erin

Primary identifier: erin.bledsoe Account Type: Internal Manage fulfillment activities

Record type: Staff User group: library staff

Role information

Role name: Fulfillment Services Operator Scope: Central Washington University

Status: Active Expiry Date:

Role parameters

No records were found.

Service Unit *

Add service unit

Select **Save Role** when done.

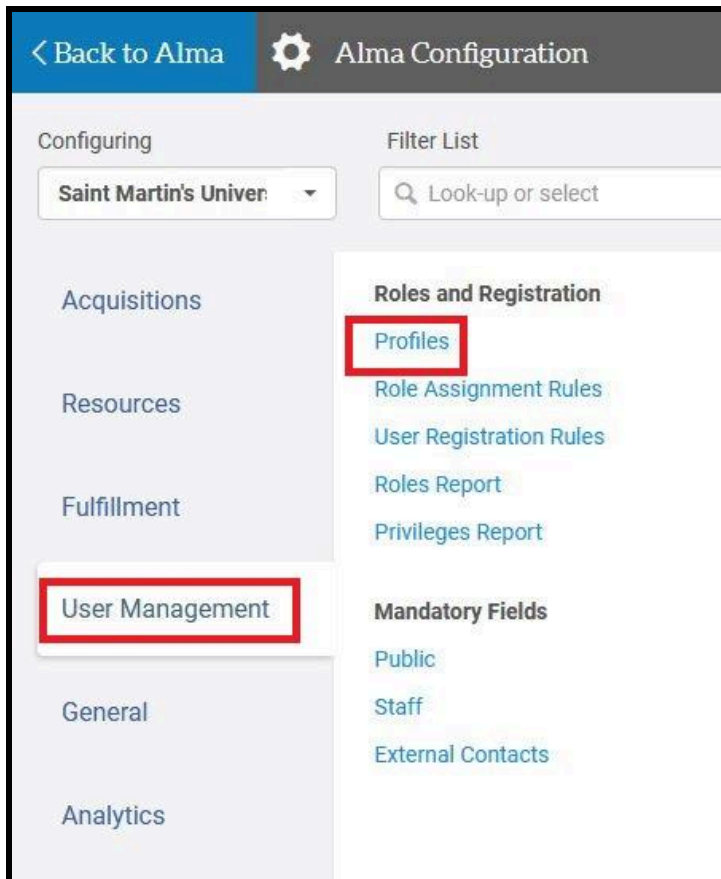
Save the user profile when all roles are added and modified per your institution's needs.

*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.

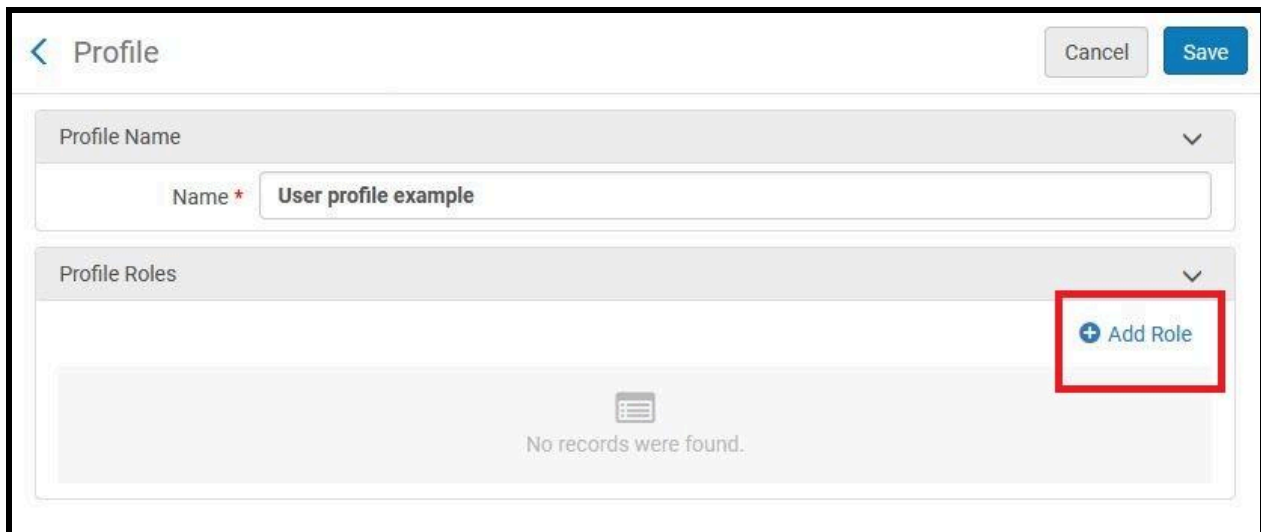
Open Alma Configuration and go to **Profiles** under **User Management > Roles and Registration**



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**

Profile

Cancel Save

Profile Name

Name * User profile example

Profile Roles

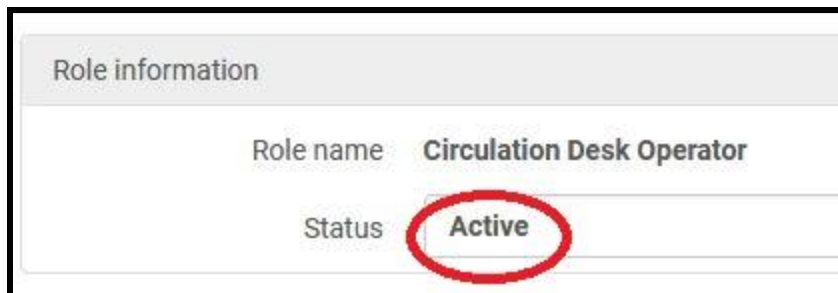
+ Add Role

No records were found.

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.

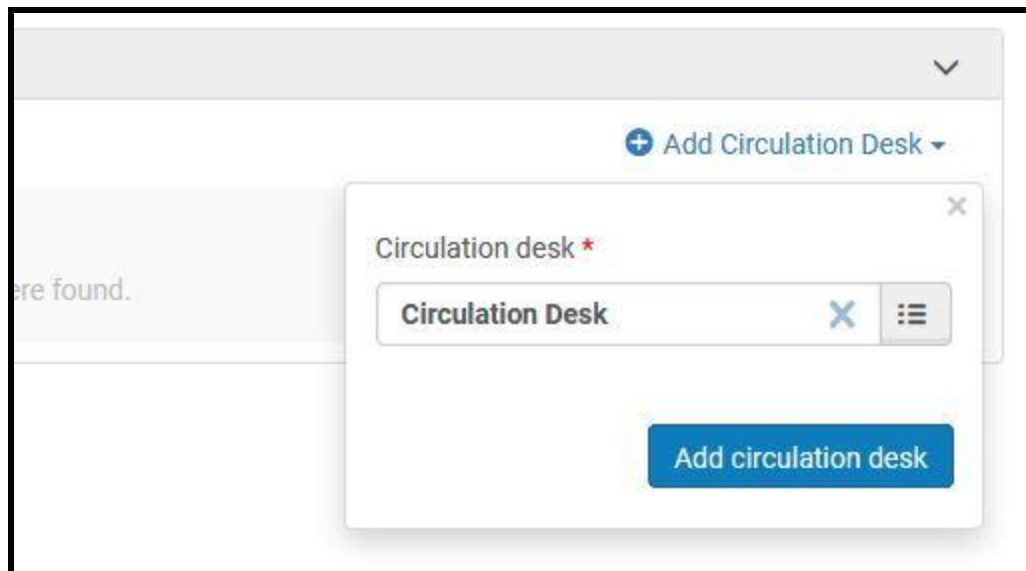
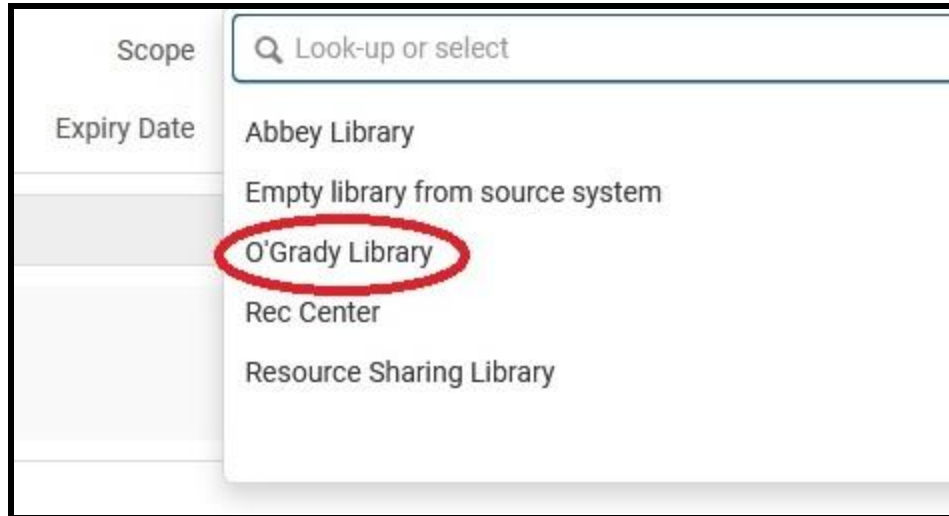
Click **Add Role**

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**.



Role information

Role name	Circulation Desk Operator
Status	Active

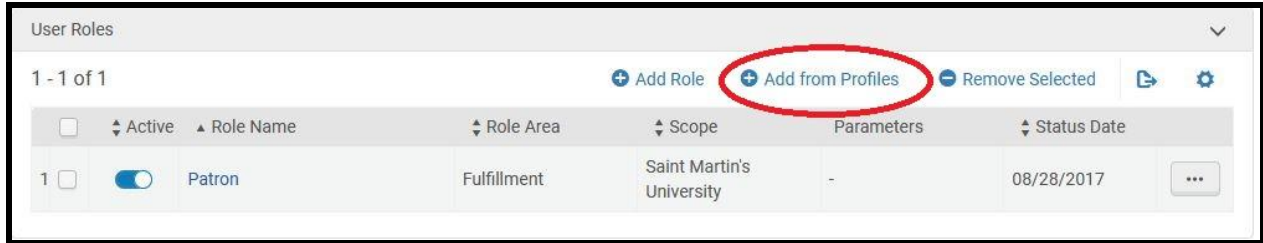


When you've finished, click **Save Role**

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.



The screenshot shows the 'User Roles' management interface in Alma. At the top, there are three buttons: '+ Add Role', '+ Add from Profiles' (which is circled in red), and '- Remove Selected'. Below the buttons is a table with the following columns: Active, Role Name, Role Area, Scope, Parameters, and Status Date. The table contains one row for a role named 'Patron'.

	Active	Role Name	Role Area	Scope	Parameters	Status Date	
1	<input checked="" type="checkbox"/>	Patron	Fulfillment	Saint Martin's University	-	08/28/2017	...

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