

Alma Essentials – User Management

Managing User Roles

User Roles in Alma define what functions a user can perform, and what privileges they have in Alma. For example, since my user has the Acquisitions Administrator role, I have access to the Acquisitions menu, and the tools I see here are determined by my user roles.

In this session, we'll show how to view and edit a user's roles, and how to manually assign user roles to a user. Note that to do this, you yourself need to have the User Manager or User Administrator role!

To **view and edit** a user's roles, search for your user and click on their name to edit. In the User Roles section, we can see our user's assigned roles, including Fulfillment Services Manager and Receiving Operator. The suffix of the role lets you know the loose hierarchy of the permissions.

Viewer roles have view-only permissions for the given domain.

Operator roles can perform select day-to-day operations in the given domain.

Manager roles can perform all day-to-day operations in the domain.

And **Administrator** roles can do the back-office configurations for that domain. Administrator roles are not synonymous with having all privileges in Alma. In fact, they normally don't cover access for the operational workflows.

You can refer to the documentation to see the complete list of roles and associated privileges.

Each role has a scope that determines where that role applies, which could be a specific library or the entire institution. For example, our user has the Fulfillment Services Manager role only in the Engineering Library. You can add the same role more than once with a different scope each time.

To add user roles, click Add Role. Select the roles to add. And click Add Role.

Our new roles have been added, and may or may not be activated, depending on their settings.

The Circulation Desk Operator role is inactive because it requires a specific library for its scope and a circulation desk. To add the scope we can edit the role by clicking on its name.

Here we can change the status of the role, set an expiry date for the role, and change the scope to a specific library, as we intended. Now we must add a Circulation desk. And save the role.

Our user's Circulation Desk Operator role is now active and configured with the selected scope and circulation desk.

Another method for adding several roles at once is using **Role Profiles**, which are sets of roles, that already include scopes and parameters. This is very useful for institutions with a large staff and many circulation and acquisitions desks. Click Add from Profiles. Here you can

select one or more Role Profiles. Note that you can create Role Profiles suitable for the needs of your institution. Let's for example add the Cataloger Role Profile. We can see the roles it comprises of such as Physical Inventory Operator and Cataloger; each role already has a scope configured. Click Select.

Our user record now has the roles from the Cataloger Role Profile added to it. You can sort the roles by Status Date to see the last ones added. The roles from the Profile are already scoped to their proper location.

If you wish to **remove** a role, you can click on its Row Options > Remove > Confirm. Alternatively, you can select several roles and click Remove Selected > Confirm. When done editing your user, click Save.

We have just seen how you can add roles manually to an individual user. To spare this manual effort, Alma offers three methods of automatic role assignment.

In our next session, we'll show how to automatically assign user roles using these methods.

Thanks for joining!