

Alma Essentials – User Management

Assign User Roles Automatically

In our last session, we saw how to manually assign User Roles to an individual user. In this session, we'll talk about automatic role assignment; which is more efficient.

There are three automated methods for role assignment in Alma.

The first automated method is **Role Assignment Rules** for new users. Your Alma Administrator can set up automated rules so that when new users are created, they are automatically assigned roles depending on their User Group, Job Category, and other criteria. Let's create a new user to see this in action. Enter the mandatory fields. Now, my institution has a Role Assignment rule that assigns certain Acquisitions roles for users that fulfill the following criteria: They are in the Administrative Staff user group; and they have the Acquisitions Operator Job Category. Having entered these parameters, click Save and continue. Behind the scenes, Alma adds the roles from a selected Role Profile. Now if we scroll down, we see our new user has been automatically assigned with the roles as defined by our specific Role Assignment Rule. Of course, your institution can set up different rules. When done editing the new user, click Save.

Now for the second method of automatic role assignment. Circulation Desk related roles in Alma can be added or removed in bulk for a list of users provided in an Excel spreadsheet. This is done under Admin > Load Desk/Department Operators. Click Add job.

Select the operation:

Export creates a spreadsheet of the current users assigned to a desk.

Import assigns the circulation desk roles to the users listed in an input spreadsheet.

And **Delete** Removes the circulation desk roles for the users listed in an input spreadsheet.

An example workflow consists of exporting a list of existing users assigned to a circulation desk, modifying the list, and re-importing it into Alma, to streamline role assignment. This is useful when managing a high turnover of part time or temporary student workers in the library. We won't demonstrate these processes now, but you can learn more about them in the **Managing Circulation Desk Operators** section of the Managing User Roles document.

Now for our third method of automatic role assignment. The non-circulation desk roles in Alma can also be automatically assigned in bulk to a set of existing users. You can do this by running the **Update/Notify Users** job, found under Admin > Run a job. We will demonstrate this process in our Update User Records in Bulk session.

Thanks for joining!