Roles and Registration Configuration

For more information about roles, see Managing User Roles.

The base unit of permission for viewing an item (page, option, link) or performing an action is a privilege; privileges are internally used and configured by Ex Libris. Privileges are grouped by roles. Roles are grouped by role profiles.

Configuring Role Profiles

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

• User Administrator
• General System Administrator

A role profile is a collection of roles, grouped according to job function. Role profiles make it easy to add a commonly select list of roles to a user when adding a new user (by assigning the user a job category or user group, for example; see Configuring Role Assignment Rules) or when managing a user's roles (see Adding Roles to Users).

You can configure role assignment rules which automatically assign role profiles to new users (see Configuring Role Assignment Rules).

You configure role profiles on the Profiles List page (Configuration Menu > User Management > Roles and Registration > Profiles).

You can perform the following actions for role profiles:

• Add a role profile - See Adding a Role Profile.
• Edit a role profile - Select **Edit** in the row actions list and follow the instructions in [Adding a Role Profile](#).

• Duplicate a role profile - Select **Duplicate** in the row actions list and follow the instructions in [Adding a Role Profile](#) to edit the profile.

• Delete a role profile - Select **Delete** in the row actions list and select **Confirm** in the confirmation dialog box.

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### Adding a Role Profile

You can add role profiles. To add a role profile, enter the name of the profile and then add all of the required roles to the profile.

**To add a role profile:**

1. On the Profiles List page (*Configuration Menu > User Management > Roles and Registration > Profiles*), select **Add Profile**. The Profile page appears. This is the first page of a two-page wizard.

   ![Profile Page](profile_page.png)

   **Profile Page**

2. Enter a name for the role profile (required), and select **Save and Continue**. The **Profile Roles** area appears.

   ![Profile Page – Updated](profile_page_updated.png)

   **Profile Page – Updated**

3. To add roles, select **Add Role**. The Add New Roles page appears. Follow the instructions in [Adding Roles to Users](#). After adding roles, they appear in the Profile Roles area.
   
   ◦ To remove roles, select **Remove** in the row actions list or select the roles and select **Remove Selected**.
   
   ◦ To edit a role, select **Edit** in the row actions list. Follow the instructions in [Editing Roles Assigned to Users](#).
   
   ◦ If the scope is properly set for a role, you can activate or deactivate a role by selecting the slider in the row.

4. Select **Save** to save the profile.

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### Configuring Role Assignment Rules

To configure role assignment rules, you must have one of the following roles:

- User Administrator
- General System Administrator

After you define role profiles (see [Adding a Role Profile](#)), you can create rules that automatically assign role profiles to a newly added user. When a user is added (see [Adding Users](#)), if the user's information matches one of the enabled role assignment rules, the user is assigned the role profiles associated with the rule. Only the first matching enabled rule is applied to the new user. If no enabled rules apply, the default rule is applied to the user (all users match this rule automatically if they did not match any other rule).
Existing users are unaffected by newly configured rules.

You configure role assignment rules on the Automatic Role Assignment rules table (Configuration Menu > User Management > Roles and Registration > Role Assignment Rules). For more information about rules tables, see Rules Tables.

![Automatic Role Assignment Rules Page](image)

**Automatic Role Assignment Rules Page**

The input parameters are:

- **Birth Date** - Match users born before, on, or after a specific date.
- **Job Category** - Match users assigned any of the selected job categories.
- **Record Type** - Match users of any of the selected record types (Contact, Public, or Staff).
- **Status** - Match active or inactive users.
- **User Group** - Match users assigned any of the selected user groups.

For output parameters, select the role profiles to assign to the users that match the input parameters.

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**Configuring User Registration Rules**

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

- User Administrator
- General System Administrator

After you define user registration terms of use sets (see Configuring Terms of Use), you can create rules that automatically assign a user registration terms of use to a newly added user. When a user is added (see Adding Users), if the user's group matches one of the enabled user registration rules, the user is assigned the terms of use associated with the rule. Only the first matching enabled rule is applied to the new user. If no enabled rules apply, the default rule is applied to the user (all users match this rule automatically if they did not match any other rule).

Existing users are unaffected by newly configured rules.

You configure user registration rules on the User Registration rules table (Configuration Menu > User Management > Roles and Registration > User Registration Rules). For more information about rules tables, see Rules Tables.

![User Registration Rules](image)
User Registration Rules Page

The input parameters for rules are:

- **User Group** - Match users assigned any of the selected user groups.

For output parameters, select the terms of use to assign to the users that match the input parameters.

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**Note**

The rules are applied when users are added using the **Register New User** option in the Manage Patron Services page. See [Registering Patrons](#).

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### Roles Report

The Roles Report provides a detailed list of what a user with a particular role can do in the system, such as the menu items that are shown for a user with a specific role or the pages that the user can access and whether they can add, view, or edit information on that page. Contact Ex Libris for assistance with this page.

For a description of the various user roles and the Alma components that each user can access, see [User Roles – Descriptions and Accessible Components](#).

You view the Roles Report at **Configuration Menu > User Management > Roles and Registration > Roles Report**. Enter the required role from the **Roles** drop-down list.

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**Note**

Some of the roles, such as **Exlibris** (all), **SAAS Operator**, and **Technical Analyst**, are internal and cannot be assigned to users.

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![Roles Report](image)
Privileges Report

The Privileges Report (Configuration Menu > User Management > Role and Registration > Privileges Report) provides a list of the privileges associated with each role. This information may be helpful in understanding the functionality of certain pages and links; unfortunately, it is not possible to provide a complete description of how each privilege works, in detail. For a description of the various user roles and the Alma components that each user can access, see User Roles – Descriptions and Accessible Components.

You can filter the report by role or privilege.

Note

- Some roles, such as Ex Libris (all), SAAS Operator, and Technical Analyst, are internal and cannot be assigned to users.
- Some roles are related to other URM-related products, such as Leganto or Esploro. If you have any questions, contact Ex Libris customer support.