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).

Profiles List Page

Note

If the selected role profile does not have roles assigned to it, you can add roles as described in Adding a Role Profile.

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](image)

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

![Profile Page – Updated](image)

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. If several enabled rules apply, they all are...
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).

For an example of role assignment rules, watch Assign User Roles Automatically (3:05).

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.

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**Note**

Existing users are unaffected by newly configured rules.

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![Automatic Role Assignment Rules Page](image)

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.

The input parameters for rules are:

- **User Group** - Match users assigned any of the selected user groups.
- **Library** - The 'currently at' library if user is being registered at the circulation desk, or the owning library of the item if the patron role is being renewed at the circulation desk following a loan block.

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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### Configuring Users' Ability to View Operator Details

By default, an **Operator** column appears in the **History** tab (and some other tabs) on many Alma pages. All users with manager and/or administrator roles can view this column (assuming that they can view the page); users with only operator roles cannot view this column.

On the Manage Operator Details Visibility page (Configuration Menu > User Management > General > Manage Operator Details Visibility), you can configure that only the managers and administrators relevant to specific areas can view the **Operator** column in the pages in these areas.

**Manage Operator Details Visibility**

To restrict users' ability to view operator details:
On the Manage Operator Details Visibility page, select **Hide** and select **Save and Execute**. When **Hide** is selected, the following roles can view the **Operator** column in the **History** tab on the following pages:

Users Who Can View Operator Column

<table>
<thead>
<tr>
<th>Roles</th>
<th>History Tabs (unless otherwise noted)</th>
</tr>
</thead>
<tbody>
<tr>
<td>• Acquisitions Administrator</td>
<td>• Purchase order line</td>
</tr>
<tr>
<td>• Fiscal Period Manager</td>
<td>• Invoice</td>
</tr>
<tr>
<td>• Fund Manager</td>
<td>• License</td>
</tr>
<tr>
<td>• Invoice Manager</td>
<td>• Purchase Request Manager</td>
</tr>
<tr>
<td>• Ledger Manager</td>
<td>• Purchasing Manager</td>
</tr>
<tr>
<td>• License Manager</td>
<td>• Trial Manager</td>
</tr>
<tr>
<td>• Purchase Request Manager</td>
<td>• Vendor Account Manager</td>
</tr>
<tr>
<td>• Purchasing Manager</td>
<td>• Vendor Manager</td>
</tr>
<tr>
<td>• Trial Manager</td>
<td>• User Administrator</td>
</tr>
<tr>
<td>• Vendor Account Manager</td>
<td>• User Manager</td>
</tr>
<tr>
<td>• Vendor Manager</td>
<td>• Find/Fees (Loan Audit Trail: edit user &gt; Fine/Fees &gt; View Loan)</td>
</tr>
<tr>
<td>• User Administrator</td>
<td>• User</td>
</tr>
<tr>
<td>• User Manager</td>
<td>• Jobs (Events Report: History &gt; Events, Creator column)</td>
</tr>
<tr>
<td>• ALL</td>
<td>• Lending or borrowing requests</td>
</tr>
<tr>
<td></td>
<td>• Manage patron services (Loan Audit Trail: display all loans &gt; Loan History)</td>
</tr>
<tr>
<td>• Circulation Desk Manager</td>
<td>• Collections</td>
</tr>
<tr>
<td>• Course Reserves Manager</td>
<td>• Bibliographic or authority records</td>
</tr>
<tr>
<td>• Fulfillment Administrator</td>
<td>• Holdings</td>
</tr>
<tr>
<td>• Fulfillment Services Manager</td>
<td>• Physical items</td>
</tr>
<tr>
<td>• Resource Sharing Partners Manager</td>
<td>• Electronic collection, portfolio, or service</td>
</tr>
<tr>
<td></td>
<td>• Digital representation</td>
</tr>
<tr>
<td>• Catalog Administrator</td>
<td>• Collections</td>
</tr>
<tr>
<td>• Catalog Manager</td>
<td>• Bibliographic or authority records</td>
</tr>
<tr>
<td>• Deposit Manager</td>
<td>• Holdings</td>
</tr>
<tr>
<td>• Repository Administrator</td>
<td>• Physical items</td>
</tr>
<tr>
<td>• Repository Manager</td>
<td>• Electronic collection, portfolio, or service</td>
</tr>
<tr>
<td></td>
<td>• Digital representation</td>
</tr>
</tbody>
</table>
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.

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

Note

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

The following user roles in Alma can make changes to Alma user accounts:

- General System Administrator
- User Administrator
- User Manager
- Circulation Desk Manager
- Circulation Desk Operator
- Circulation Desk Operator - Limited
- Repository Manager

However, you can prevent these user roles from making changes to specific user accounts (for example, editing contact info). This is a two-step process:

- You define accounts as ‘restricted for editing’ in the Users Restricted for Editing table (Configuration Menu > User Management > Roles and Registration > Users Restricted for Editing). If a user account has any of the roles defined in this table, or is assigned any of the user groups listed in this table, then this account is considered ‘restricted for editing’.
- For the user roles that can make changes to Alma user records (the above-listed roles), you can activate the "Can't edit restricted users" parameter. This prevents these users from making any changes to the ‘restricted for editing’ accounts. See Managing User Roles.

For example: PAT_A is an account assigned a Licenses Manager role. The Licenses Manager has been defined in this Users Restricted for Editing table as ‘restricted for editing’. User USER_B has a User Manager role. Therefore, this user can update user accounts. But the User Manager role is marked as "Can't edit restricted users". This user therefore cannot update PAT_A’s account, but will be able to update other accounts that are not assigned the License Manager role.

Select Add User Group or Add Role and select the user group or user role that you wish to restrict.