

## Managing User Roles

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

- User Manager
- User Administrator

## Adding Roles to Users

You add a role to a user by:

- Selecting roles individually, as described below.
- Running the Update/Notify Users job to add roles to users in bulk; see [Update/Notify Users](#).

When a user's role assignments have been edited, the user is required to log out and log in again for the changes to take effect.

You manage roles in the **User Roles** area on the **General Information** tab of the User Details page (**Admin > User Management > Manage Users**; select **Edit** in the row actions list).

Active	Role Name	Role Area	Scope	Parameters	Status Date
<input checked="" type="checkbox"/>	Patron	Fulfillment	Ex Libris University	-	2012/01/30

### User Roles Area

#### To add roles to a user:

1. In the **User Roles** area on the User Details page, add roles using one of the following methods:
  - Manually select roles for the user: Select **Add Role**. The Add New Roles page appears.

**Add New Roles**

User Management

Role	Privileges
<input type="checkbox"/> User Administrator	Manages all aspects of user management, including configuration aspects such as setting up and running user synchronization actions
<input type="checkbox"/> User Manager	Manages user information, such as roles, blocks and contact information

Acquisitions

Role	Privileges
<input type="checkbox"/> Acquisitions Administrator	Manages Acquisitions configurations such as Acquisitions processes
<input type="checkbox"/> Fiscal Period Manager	Manages copy ledger, rollover job and edit fiscal period table
<input type="checkbox"/> Fund Manager	Manages all fund related actions
<input type="checkbox"/> Fund-Ledger Viewer	View only for funds and ledgers
<input type="checkbox"/> Invoice Manager	Manages invoice creation, review and approval actions
<input type="checkbox"/> Invoice Operator	Manages invoice creation and review actions

#### Add New Roles Page

For the description of the roles that can be configured for users, see [User Roles – Descriptions and Accessible Components](#).

Select the roles you want to assign to the user and select **Add Role**. If you select a single role, the User Roles Details page appears. See [Editing Roles Assigned to Users](#). If you select multiple roles, the roles are added to the user.

2. Select **Save**. Roles that require additional configuration (such as selecting a scope) are inactive until you edit them; see [Editing Roles Assigned to Users](#).

## Editing Roles Assigned to Users

You can activate or deactivate a user's roles, and you can change a user role's scope. When multiple roles are added all at once to a user (see [Adding Roles to Users](#)), roles that require additional configuration (such as selecting a scope) remain inactive until they are edited.

### To edit a role assigned to a user:

1. In the **User Roles** area on the User Details page (**Admin > User Management > Manage Users**; select **Edit** in the row actions list), select the role or select **Edit** in the row actions list. The User Roles Details page appears.

### User Roles Details Page

2. Edit the required information.

Role Information Fields

Field	Description
Role name	The name of the role.
Scope	<p>This field is mandatory, even though the field appears without a red asterisk.</p> <ul style="list-style-type: none"> <li>For roles that always apply to the entire institution, the scope is set to the institution and cannot be changed.</li> <li>For roles set on the library/campus level, select the campus/library (or the institution, if it is available) to which the role applies.</li> </ul> <p>After selecting the scope, some roles require additional information in the <b>Role Parameters</b> section, such as a service unit or circulation desk. Select the required values for these parameters, as described in <a href="#">User Roles – Descriptions and Accessible Components</a>.</p> <p>To add multiple libraries/campuses, add the role to the user multiple times, selecting a different library/campus each time.</p>

Field	Description
	<p><b>Note</b></p> <p>If you reduce a user's scope to library-level from institution-level, or remove a library-level scope from a user, the user can no longer manage those entities that are assigned to him/her but are now out of scope.</p>
Status	<p>Select whether the role is active or inactive.</p> <p><b>Note</b></p> <p>The role is considered inactive after the role expiry date even if its status is still 'Active'. For a role to be considered active, it must have both an 'Active' status and no expiry date that is in the past.</p>
Expiry date	<p>The date after which the role becomes inactive.</p> <p><b>Note</b></p> <p>The role is considered inactive after the role expiry date even if its status is still 'Active'. For a role to be considered active, it must have both an 'Active' status and no expiry date that is in the past.</p>
Can't edit restricted users	<p>This setting is applicable for the following roles:</p> <ul style="list-style-type: none"> <li>◦ General System Administrator</li> <li>◦ User Administrator</li> <li>◦ User Manager</li> <li>◦ Circulation Desk Manager</li> <li>◦ Circulation Desk Operator</li> <li>◦ Circulation Desk Operator - Limited</li> <li>◦ Repository Manager</li> </ul> <p>User accounts can be defined as 'restricted for editing' in the <b>Users Restricted for Editing</b> table (<a href="#">Configuration Menu &gt; User Management &gt; Roles and Registration &gt; Users Restricted for Editing</a>). See <a href="#">Restricting Users for Editing</a>.</p> <p>If all of this user's roles have <b>Can't edit restricted users</b> selected, the user has no edit/delete access for restricted users. This user will still be able to view the user records, but not to make changes (such as editing contact info, etc.). If this user is assigned several of the above roles, and some roles have "Can't edit restricted users" selected and other roles do not, the user can still make changes.</p>

3. Select **Save Role**. The role is saved.
4. Select **Save**. The user details are saved.

If the scope is properly set for a role, you can activate or deactivate a role by selecting the slider in the **User Roles** area on the User Details page.

## Removing Roles from Users

You can remove roles assigned to a user.

## To remove roles from users:

1. In the **User Roles** area on the User Details page (**Admin > User Management > Manage Users**; select **Edit** in the row actions list), select the role or select **Delete** in the row actions list or select the roles and select **Remove Selected**. A confirmation dialog box appears.
2. Select **Confirm** in the confirmation dialog box. The roles are removed.
3. Select **Save**. The user details are saved.

---

## User Roles – Descriptions and Accessible Components

The following table describes the roles that can be configured for users and the Rapido components that each user role can access.

For the below jobs, institution scope is required to run jobs. For the list of roles managed at the library level, see [Roles Managed at the Library Level](#).

---

### Note

User roles (actually, the internal privileges associated with the roles) determine not only which pages a user can access, but often the fields, options, jobs, or actions that the user can perform on these pages. Unfortunately, it is not possible to present here an extensive and exact list of every option and action available on each Rapido page for each role. See [Role Privileges](#) below for detailed information on privileges required to access each page and, in some cases, perform a specific action on the page. Additional information is provided in the [Roles Report](#) and [Privileges Report](#).

For more details on jobs and the roles that are required to be able to run them, see [Manual Jobs and Their Relevant Parameters](#).

---

Manages the library's fulfillment services related to resource sharing.

---

### Note

The **Fulfillment Services Operator** needs the scope of a library to be able to see Resource Sharing requests. If the scope of the role is on the Institution Level, Resource Sharing requests do not become visible.

---

User Roles

Module	Role	Accessible Components	Description	Scope	Role Parameters
User Management	User Administrator	<b>ADMIN:</b> <ul style="list-style-type: none"><li>• Manage Users</li><li>• Purge User Records</li><li>• User Identifier Types (read only)</li></ul>	<p>Manages all aspects of user management, including configuration aspects such as setting up and running user synchronization actions. Can manage Patron record type.</p> <p>Select <b>Read Only</b> to enable the user to view but not edit user management configurations.</p> <p>The User Administrator can change the password of an internal user.</p>	Institution	<ul style="list-style-type: none"><li>• Read only – When selected, the user can view user management configuration tables, but not change them or run any related user management jobs.</li></ul>

Module	Role	Accessible Components	Description	Scope	Role Parameters
		<ul style="list-style-type: none"> <li>• Run a Job</li> <li>• Monitor Jobs</li> <li>• Manage Sets</li> <li>• Toggle Account Type</li> <li>• User Management Configuration Menu</li> </ul>	The User Administrator can delete users.		
	User Manager	<p><b>ADMIN:</b></p> <ul style="list-style-type: none"> <li>• Manage Users</li> <li>• User Identifier Types (read only)</li> <li>• Run a Job</li> <li>• Monitor Jobs</li> <li>• Manage Sets</li> <li>• Manage Exports</li> <li>• Toggle Account Type</li> </ul>	<p>Manages user information, such as roles, blocks, and contact information. Can manage Patron record types.</p> <p>The User Manager can change the password of an internal user.</p> <p>The User Manager can delete users.</p>	Institution	
Discovery	Discovery - Administrator	<ul style="list-style-type: none"> <li>• Labels</li> <li>• Discovery Configuration Menu</li> </ul>	Enables the configuration of all discovery functionality.	Institution	
	Discovery Operator - Limited	<p><b>DISCOVERY:</b></p> <ul style="list-style-type: none"> <li>• Discovery Configuration Menu</li> </ul>	<p>Limits the administrator to the following options on the Discovery Configuration menu:</p> <ul style="list-style-type: none"> <li>• Display Configuration</li> <li>• Other</li> </ul>	Institution	

Module	Role	Accessible Components	Description	Scope	Role Parameters
Fulfillment	Circulation Desk Manager	<p><b>FULFILLMENT:</b></p> <ul style="list-style-type: none"> <li>Scan in items</li> </ul> <p><b>ADMIN:</b></p> <ul style="list-style-type: none"> <li>Manage Users</li> </ul>	<p>Manages circulation desk actions.</p> <p>You must assign a circulation desk when configuring this role.</p> <p>To configure this role for multiple circulation desks in the same scope, assign the desks as multiple parameters in the same role.</p>	Library	<ul style="list-style-type: none"> <li>Circulation Desk – The circulation desk for which this role applies.</li> </ul>
	Circulation Desk Operator	<p><b>FULFILLMENT:</b></p> <ul style="list-style-type: none"> <li>Scan in items</li> </ul> <p><b>ADMIN:</b></p> <ul style="list-style-type: none"> <li>Manage Users</li> </ul>	<p>You must assign a circulation desk when configuring this role.</p> <p>To configure this role for multiple circulation desks in the same scope, assign the desks as multiple parameters in the same role.</p> <p>The Circulation Desk Operator can change the password of an internal user if the user has a patron role only and the role has not expired.</p>	Library	<ul style="list-style-type: none"> <li>Circulation Desk – The circulation desk for which this role applies.</li> </ul>
	Circulation Desk Operator - Limited	<p><b>FULFILLMENT:</b></p> <ul style="list-style-type: none"> <li>Scan in items</li> </ul> <p><b>ADMIN:</b></p> <ul style="list-style-type: none"> <li>Manage Users</li> </ul>	<p>You must assign a circulation desk when configuring this role.</p> <p>The Circulation Desk Operator - Limited can change the password of an internal user if the user has a patron role only and the role has not expired.</p>	Library	<ul style="list-style-type: none"> <li>Circulation Desk – The circulation desk for which this role applies.</li> </ul>
	Fulfillment Administrator	<p><b>FULFILLMENT:</b></p> <ul style="list-style-type: none"> <li>Fulfillment Configuration Menu</li> </ul> <p><b>ADMIN:</b></p> <ul style="list-style-type: none"> <li>Run a Job</li> <li>Monitor Jobs</li> <li>Manage Exports</li> </ul>	<p>Select <b>Read Only</b> to enable the user to view but not edit fulfillment configurations.</p>	Institution / Library	<ul style="list-style-type: none"> <li>Read only – When selected, the user can view fulfillment configuration tables, but not change them or run any related fulfillment jobs.</li> </ul>
	Fulfillment Services Manager	<p><b>FULFILLMENT:</b></p> <ul style="list-style-type: none"> <li>Monitor Requests &amp; Item</li> </ul>	<p>Manages the library's authoritative fulfillment service actions - assigns and handles resource sharing requests.</p>	Institution / Library	

Module	Role	Accessible Components	Description	Scope	Role Parameters
		<p>Processes</p> <p><b>ADMIN:</b></p> <ul style="list-style-type: none"> <li>Manage Users (View Only)</li> </ul>			
	Fulfillment Services Operator	<p><b>FULFILLMENT:</b></p> <ul style="list-style-type: none"> <li>Resource Sharing Requests</li> </ul> <p><b>ADMIN:</b></p> <ul style="list-style-type: none"> <li>Manage Users (View Only)</li> </ul>	<p>Manages the library's fulfillment services related to resource sharing.</p> <hr/> <p><b>Note</b></p> <p>The <b>Fulfillment Services Operator</b> needs the scope of a library to be able to see Resource Sharing requests. If the scope of the role is on the Institution Level, Resource Sharing requests will not become visible.</p> <hr/>	Institution / Library	<ul style="list-style-type: none"> <li>Service Unit – The department for which this role applies.</li> </ul>
	Patron	<p><b>USER MANAGEMENT:</b></p> <ul style="list-style-type: none"> <li>User Details - Fines/Fees tab</li> </ul>	<p>Receives services from the specified library (if the institution is specified, the patron receives services from all libraries in the institution). Services include receiving loans, placing requests for physical items, and digitization of items.</p> <hr/> <p><b>Note</b></p> <p>To limit patron's circulation activity, you can set either the user card OR the Patron role expiry date. A patron cannot perform fulfillment activities if either the user card or the Patron role has expired. For more information about the user expiry date, see <a href="#">Expiration Date</a>.</p> <hr/>	Institution / Library	
	Resource Sharing Partners Manager	<p><b>ACQUISITIONS:</b></p> <ul style="list-style-type: none"> <li>Create Purchase Request</li> </ul> <p><b>FULFILLMENT:</b></p> <ul style="list-style-type: none"> <li>Partners</li> </ul>	<p>Manages resource sharing partners, to define the types of communication available between Rapido and the resource sharing system. Also manages rota templates, to enable attaching a group of partners to a resource sharing request.</p>	Institution / Library	

Module	Role	Accessible Components	Description	Scope	Role Parameters
		<ul style="list-style-type: none"> <li>Rota Templates</li> </ul>			
Inventory	Repository Administrator	<b>RESOURCES:</b> <ul style="list-style-type: none"> <li>Import profiles</li> </ul> <b>ADMIN:</b> <ul style="list-style-type: none"> <li>Run a Job</li> <li>Monitor Jobs</li> <li>Manage Exports</li> </ul>	<p>Manages institution and library configurations related to inventory.</p> <p>Select <b>Read Only</b> to enable the user to view but not edit resources configurations.</p>	Institution	<ul style="list-style-type: none"> <li>Read only – When selected, the user can only view repository configurations, but not change them or run any related repository jobs.</li> </ul>
	Repository Manager	<b>RESOURCES:</b> <ul style="list-style-type: none"> <li>Manage Repository</li> <li>Restore Jobs</li> </ul> <b>ADMIN:</b> <ul style="list-style-type: none"> <li>Run a Job</li> <li>Monitor Jobs</li> <li>Manage Sets</li> <li>Manage Exports</li> </ul>	<p>Manages authoritative inventory-related actions, including adding, editing, deleting, and linking inventory.</p>	Institution / Library	
Miscellaneous	Analytics Administrator	<b>ACQUISITIONS:</b> <ul style="list-style-type: none"> <li>Create Purchase Request</li> </ul> <b>ANALYTICS:</b> <ul style="list-style-type: none"> <li>Subscribe to Analytics</li> <li>Analytics Configuration Menu <ul style="list-style-type: none"> <li>Analytics Objects List</li> </ul> </li> </ul>	<p>Enables configuring analytics and exposing analytics to other staff operators.</p>	Institution	

Module	Role	Accessible Components	Description	Scope	Role Parameters
		<ul style="list-style-type: none"> <li>◦ Analytics User Statistics</li> <li>◦ Analytics Citation Attribute Types</li> <li>◦ Analytics Other Settings</li> </ul>			
	Designs Analytics	<p><b>ACQUISITIONS:</b></p> <ul style="list-style-type: none"> <li>• Create Purchase Request</li> </ul> <p><b>ANALYTICS:</b></p> <ul style="list-style-type: none"> <li>• Design Analytics</li> <li>• Design Analytics (Primo)</li> </ul>	Enables creating analytics reports.	Institution	
	General System Administrator	<p><b>RESOURCES:</b></p> <ul style="list-style-type: none"> <li>• Resources Configuration Menu</li> </ul> <p><b>FULLFILLMENT:</b></p> <ul style="list-style-type: none"> <li>• Resend Printouts/ Emails</li> <li>• Fulfillment Configuration Menu</li> </ul> <p><b>ADMIN:</b></p> <ul style="list-style-type: none"> <li>• Manage Users</li> <li>• Run a Job</li> <li>• Monitor Jobs</li> <li>• Manage Sets</li> </ul>	<p>Overall manager of all Rapido system configurations.</p> <p>Select <b>Read Only</b> to enable the user to view but not edit configurations or run jobs.</p>	Institution	<ul style="list-style-type: none"> <li>• Read only – When selected, the user can view configuration tables and import/export profiles, but not change them or run any related jobs.</li> </ul>

Module	Role	Accessible Components	Description	Scope	Role Parameters
		<ul style="list-style-type: none"> <li>Manage Exports</li> <li>User Management Configuration Menu</li> <li>General Configuration Menu</li> </ul> <p><b>ANALYTICS:</b></p> <ul style="list-style-type: none"> <li>Analytics Configuration Menu</li> </ul>			
	Letter Administrator	<p><b>ACQUISITIONS:</b></p> <ul style="list-style-type: none"> <li>Create Purchase Request</li> </ul> <p><b>ADMIN:</b></p> <ul style="list-style-type: none"> <li>General Configuration Menu</li> </ul>	<p>Manages letter configurations, such as Letter Activity and Letter processes.</p> <p>Select <b>Read Only</b> to enable the user to view but not edit letters.</p>	Institution	<ul style="list-style-type: none"> <li>Read only – When selected, the user can view letters, but not change them.</li> </ul>
	Printout Queue Manager	<p><b>ADMIN:</b></p> <ul style="list-style-type: none"> <li>Printouts Queue</li> </ul>	<p>Has access to the Printouts Queue link (Admin &gt; Printouts Queue &gt; Printing). Can view and print all letters from the printouts queue.</p>	Institution	
	Printout Queue Operator	<p><b>ADMIN:</b></p> <ul style="list-style-type: none"> <li>Printouts Queue</li> </ul>	<p>Has access to the Printouts Queue link (Admin &gt; Printouts Queue &gt; Printing). Can view and print their own printed letters from the printouts queue.</p>	Institution	

## Roles Managed at the Library Level

The following roles can be managed at the library level:

- Circulation Desk Manager
- Circulation Desk Operator
- Circulation Desk Operator - Limited
- Fulfillment Services Manager

- Fulfillment Services Operator
- Patron
- Repository Manager
- Resource Sharing Partners Manager