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## Managing Users

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## Managing Users

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### Note

Administrators require the User Manager role to manage users in Rosetta.

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The Rosetta system enables Administrators to manage different types of users, which includes adding new users, searching users, and deleting users. Administrators can manage users from the User List page.

To access the User List page, follow the path from the Advanced Configuration page to **Users > User Management**.

The following actions can be performed on this page:

- [Adding a User](#)
- [Cloning a User](#)
- [Updating a User](#)
- [Deleting a User](#)
- [Releasing the Work of a User](#)
- [Sharing Users](#)

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## Adding a User

Administrators can add a new user to the Rosetta system. The process of adding a new user consists of the following steps:

1. Providing user information, such as a user name, password, and status
2. Assigning a role
3. Providing information about the role, which includes defining role parameters

### To add a user:

1. On the User List page (see [Managing Users](#)), click **Add User**.  
The User Details page opens.

ID	-	Creation Date	07/12/2017	Created by	John Smith
Record Type	Staff	Update Date	07/12/2017	Updated by	John Smith

### User Information

\* User Name  Language English

\* First Name  \* Last Name

\* Job Title  Middle Name

\* Email  Expiry Date

Status Active  Shared

\* Telephone 1  Telephone 2

User Group

0 items selected	Add	Remove all	Add all														
<table border="1" style="width: 100%; border-collapse: collapse;"> <tr><td>affiliate</td><td style="text-align: right;">+</td></tr> <tr><td>alum</td><td style="text-align: right;">+</td></tr> <tr><td>employee</td><td style="text-align: right;">+</td></tr> <tr><td>student</td><td style="text-align: right;">+</td></tr> <tr><td>library-walk-in</td><td style="text-align: right;">+</td></tr> <tr><td>member</td><td style="text-align: right;">+</td></tr> <tr><td>staff</td><td style="text-align: right;">+</td></tr> </table>	affiliate	+	alum	+	employee	+	student	+	library-walk-in	+	member	+	staff	+			
affiliate	+																
alum	+																
employee	+																
student	+																
library-walk-in	+																
member	+																
staff	+																

Website URI

\* Street

Suburb

City

Country Afghanistan  Postal Code

### Additional Identifiers

* Authentication Profile	* Value
dfgdf <input type="text"/>	<input type="text"/>
<input type="button" value="Add"/>	

### User Authentication

Type

External - Refers to a user type whereby user information is managed in third-party IAM system or directory server, and that data is used by the Rosetta.

Internal with External Authentication - The same as internal with the exception that the authentication is managed externally.

Internal - Refers to a user type whereby the user information is managed wholly within the Rosetta.

\* Password  \* Verify Password

## User Details Page

2. In the **User Information** page, provide the information as requested. For the User Group section, select the user groups to which you want to assign the user. To add a new user group, enter the name of the user group and click **Add**.
3. In the **Additional identifiers** pane, in the **Authentication Profile** field, enter the name of the SAML server and in the **Value** field, enter the identifier. Click **Add** to add the additional identifier. Rosetta can perform SAML authentication using any of the identifiers you configure.
4. In the **User Authentication** pane, indicate if the user is managed externally, internally with external authentication, or internally.

### Note

All fields with an asterisk (\*) are mandatory.

5. Click **Save**. The Add New Roles page opens.

Home / Data Management: Manage Users / Details

	Description
<input type="checkbox"/>	Approver - Full
<input type="checkbox"/>	Approver - Typical
<input type="checkbox"/>	Approver - View
<input type="checkbox"/>	Arranger - Full
<input type="checkbox"/>	Arranger - Typical
<input type="checkbox"/>	Arranger - View
<input type="checkbox"/>	Assessor - Full
<input type="checkbox"/>	Assessor - Typical
<input type="checkbox"/>	Assessor - View
<input type="checkbox"/>	Data Manager - Full
<input type="checkbox"/>	Data Manager - Typical
<input type="checkbox"/>	Deposit Manager - Full
<input type="checkbox"/>	Deposit Manager - Typical
<input type="checkbox"/>	Editor - Full
<input type="checkbox"/>	Editor - Typical
<input type="checkbox"/>	Editor - View
<input type="checkbox"/>	Exlibris - Support
<input type="checkbox"/>	Negotiator - Full
<input type="checkbox"/>	Negotiator - Typical
<input type="checkbox"/>	Negotiator - View
<input type="checkbox"/>	Preservation Analyst
<input type="checkbox"/>	Preservation Manager
<input type="checkbox"/>	TA - Full
<input type="checkbox"/>	User manager - Full
<input type="checkbox"/>	User manager - Typical
<input type="checkbox"/>	User manager - View

### Add New Roles Page

6. Select the roles that you want assign to the user. For detailed information, see [Working with User Roles](#).
7. Click **Add Roles**. The User Role Details page opens.

[Data Management: Manage Users](#) / Details

User ID	51962	Created on	07/12/2017	Created by	Ex Libris
User Name	John Doe	Updated on	07/12/2017	Updated by	Ex Libris
Role Name	Approver - Full				

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**Role Information**

Scope: Demo Institution  
 Status:  Status Date: \_\_\_\_\_  
 Expiry Date:    
 Notes:

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**Role Parameters**

\* Approval Group

- Un-published Approver
- JIC Internal Approver
- Published Approver

\* Metadata Type

- DC
- Source Copyrights
- Source Rights
- Source Other
- Source Marc
- Access Rights
- Source EAD
- Source Dc
- Source Mods
- DNX
- Struct Map

### User Role Details Page

8. Provide the information as requested.

#### Note

The list of parameters displayed in the User Role Parameters pane varies depending on the user role.

9. Click **Save**. The new user is saved in the Rosetta system.

The user now can log on and work with the Rosetta system, according to the defined user role.

## Cloning a User

To create a new user with the same roles as an existing one, you can clone the existing one. Cloning creates the same

user with the following characteristics and limitations:

- Limited to Staff users
  - In the Management (institution) UI, cloning is limited to roles scoped to the current institution
  - In the Administration (consortium) UI, roles across all institutions are duplicated
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#### **Note**

User roles cannot be edited until the new user's information is saved. After adding user information, click **Save** to save a user with the same roles, or click **Apply** to save the user information and edit the user roles.

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## Updating a User

Administrators can update both the general user information and the user roles of an existing user.

#### **To update a user:**

1. On the User List page (see [Managing Users](#)), locate the user you want to update and click **Update**. The User Details page opens.

Data Management: Manage Users / Details

ID 100      Creation Date 14/09/2010      Created by -  
 Record Type Staff      Update Date 13/03/2018      Updated by John Smith

**User Information**

\* User Name admin1      Language English

\* First Name John      \* Last Name Smith

\* Job Title developer      Middle Name

\* Email zvi.fass@exlibrisgroup.com      Expiry Date dd/MM/yyyy

Status Active      Shared

\* Telephone 1 212-555-9874      Telephone 2

User Group

1 Items selected	Add	Remove all		Add all
<input checked="" type="checkbox"/>			staff	
			faculty	+
			student	+
			library-walk-in	+
			member	+
			affiliate	+
			employee	+
			alum	+

Website URL

\* Street 1 BILLS DR

Suburb ORCHARD PARK

City

Country United States      Postal Code 14127-2237

**Additional Identifiers**

\* Authentication Profile dfgdf      \* Value      Add

**User Authentication**

Type

External - Refers to a user type whereby user information is managed in third-party IAM system or directory server, and used by Rosetta.

Internal with External Authentication - The same as internal with the exception that the authentication is managed externally.

Internal - Refers to a user type whereby the user information is managed wholly within the Rosetta.

\* Password .....      \* Verify Password .....

**User Roles**

Add

	Role	Details	Scope	Status	Date		
1	Administration		Preservation Consortium	14/09/2010 14:30:16			
2	Administration		Preservation Consortium	14/03/2011 11:42:36			
3	Approver - Full	Published,Unpublished,Internal	Demo Institution	14/09/2010 14:30:16	Update	Delete	
4	Approver - Full	Restricted,Unpublished,Internal,Published	INS23	21/11/2017 09:35:29			
5	Approver - Full	TP Materials	Temasek Polytechnic - Training	17/04/2014 08:59:45			

### User Details Page

2. Modify the fields that you want to update.
3. Click **Save**.

The updated user information is saved in the Rosetta system.

## Deleting a User

To remove a user from the system and prevent all further access by that user, Administrators can delete an existing user.

### To delete a user:

1. On the User List page (see [Managing Users](#)), locate the user you want to delete and click **Delete**. The confirmation page opens.
2. Click **OK**.

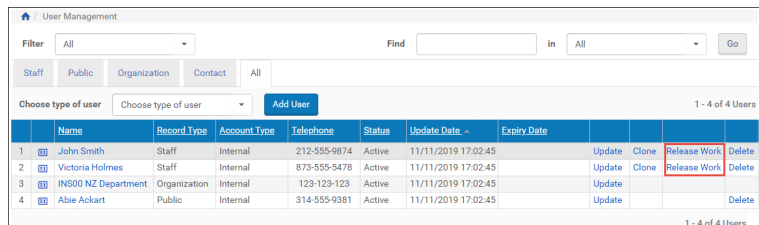
The user is deleted from the Rosetta system.

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## Releasing the Work of a User

You can unassign all SIPs and RIPs of a user and unlock any locked IEs. This can be useful if a user is unexpectedly unavailable for a considerable length of time, but you do not want to delete the user.

To release the work of a user, select the **Release Work** row action for the user:



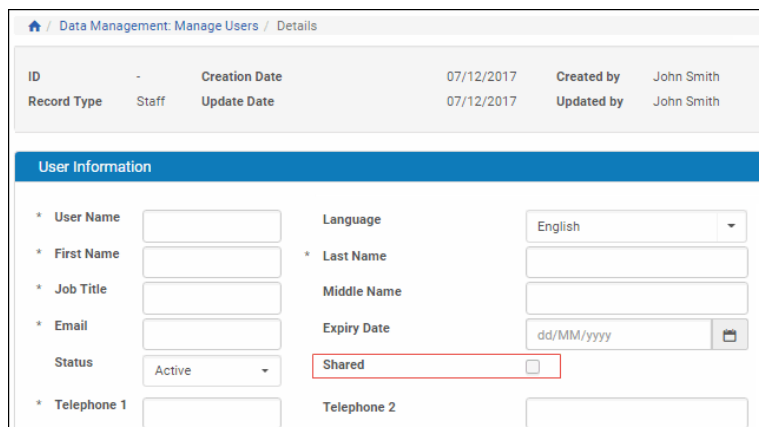
	Name	Record Type	Account Type	Telephone	Status	Update Date	Expiry Date				
1	John Smith	Staff	Internal	212-555-9874	Active	11/11/2019 17:02:45		Update	Clone	Release Work	Delete
2	Victoria Holmes	Staff	Internal	873-555-5478	Active	11/11/2019 17:02:45		Update	Clone		Delete
3	INSD00 NZ Department	Organization	Internal	123-123-123	Active	11/11/2019 17:02:45		Update			
4	Able Aekart	Public	Internal	314-555-9381	Active	11/11/2019 17:02:45		Update			Delete

### Release Work

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## Sharing Users

You can choose to share your users with other institutions, allowing them to access these users with their management interface according to roles assigned by the user manager of the respective institution. To share users, select the **Shared** checkbox when configuring the user.



Home / Data Management: Manage Users / Details

ID	-	Creation Date	07/12/2017	Created by	John Smith
Record Type	Staff	Update Date	07/12/2017	Updated by	John Smith

### User Information

\* User Name  Language

\* First Name  \* Last Name

\* Job Title  Middle Name

\* Email  Expiry Date

Status  **Shared**

\* Telephone 1  Telephone 2

### Sharing Users

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#### Note

- Only Administration User Managers and the institution that created the user can set the **Shared** checkbox.
  - If the user has been assigned roles in another institution, the **Shared** checkbox cannot be cleared until those roles are removed.
  - If a Contact user is connected with a Group Producer created in another institution, the **Shared** checkbox cannot be cleared until the connection is removed.
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