ExLibris Knowledge Center
Part of Clarivate

Managing App Roles

For more information about app roles, see Customizing End-User Access to Services.

App roles are associated to end-users on the one hand, and to services and other features on the other. A service or feature is visible to an end-user only if the end-user is associated with one or more of the app roles associated with the service or feature.

App roles are initially associated to end-users automatically, either by configuring a default app role or using customer roles; see Configuring End-User Authentication Types and Configuring Customer Roles.

- You configure the default app role and the association between app roles and customer roles when you manage app roles on the *Select app role to change* page (see below).
- You can enable/disable app roles for services and other features on this page; however, the best practice is to configure the app roles each service and feature at the same time that you configure the service or feature. For more information, see Enabling/Disabling Services in Apps.

Managing App Roles

You manage app roles on the *Select app role to change* page (**App Settings > Enterprise Roles > App Roles**). This page presents the list of app roles. For information about working with lists, see Working with Lists.

For each app role, configure:

- Profile - The profile for which this app role applies. For more information about profiles, see Customizing End-User Access to Services.
- Description - The display name of the role as it appears in other areas of the App Manager.
- Priority - Not in use.
- Default role - Assigned to any end-user. For more information, see Configuring End-User Authentication Types.
- Customer role - The customer role to which this app role is associated. For more information about customer roles, see Configuring Customer Roles.
- Menu options - The static content services to which this app role is associated. The best practice is not to manage this here, but instead when you are managing the service; see Working with Static Content and the Content Menu.
- Home page feeds - Not in use.
- RSS categories - The RSS categories to which this app role is associated. The best practice is not to manage this here, but instead when you are managing the category; see Configuring Default RSS Feeds.
- Standard RSS feeds - Not in use.
- Standard alert groups - The alert groups to which this app role is associated. The best practice is not to manage this here, but instead when you are managing the alert group category; see Configuring Alert Groups.
- Resources - Not in use.
- Maps - The maps to which this app role is associated. The best practice is not to manage this here, but instead when you are managing the map; see Adding Maps.

- Location categories - The location categories to which this app role is associated. The best practice is not to manage this here, but instead when you are managing the category; see Adding Map Location Categories.

Configuring Customer Roles

For more information about customer roles, see Customizing End-User Access to Services.

When an end-user registers using an authentication system that relies on an institution backend system, the backend system sends codes indicating the app roles to assign to the end-user. Customer roles map these codes to app roles. Ex Libris and the institution work together to configure these codes during installation. After this initial configuration, the institution can add additional codes by adding additional customer roles, as required.

You manage customer roles on the *Select customer role to change* page (**App Settings > Enterprise Roles > Customer Roles**). This page presents the list of customer roles. For information about working with lists, see Working with Lists.

For each customer role, configure:

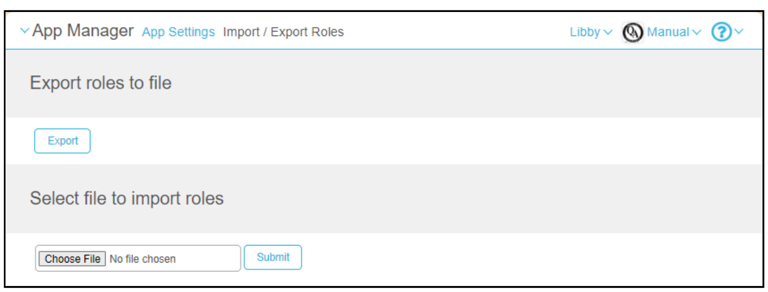
- Name - The code the institution sends to the App Manager. For more information about this field, contact Ex Libris customer support.
- Description - The display name of the customer role as it appears in the dropdown list when configuring app roles.

Importing Roles in Bulk

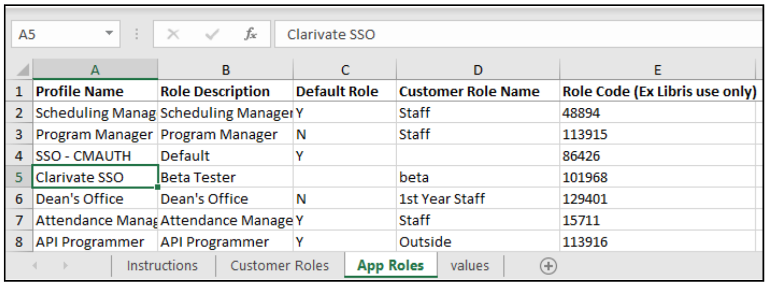
You can import lists of app and customer roles to add to the system in bulk. In order to do this, you must begin by exporting the list of existing roles, so that you can use this as a template for the list you will import. You can then add additional roles to the template, and import it into the system to add the roles to it. The template is an Excel file.

To import roles:

1. Navigate to **App Settings > Enterprise Roles > Import / Export Roles**. The Import / Export Roles page opens.



2. Select **Export**. An Excel file containing the existing roles is downloaded to your computer.
3. Open the file for editing. The first sheet, containing instructions, is shown.
4. In the **Customer Roles** sheet (tab), add additional customer roles, and in the **App Roles** sheet (tab), add additional app roles, as required. Note that the customer roles that appear in the **Customer Roles** sheet are available in the **App Roles** sheet, under **Customer Role Name**, to be matched with app roles.



A5 | Clarivate SSO

	A	B	C	D	E
1	Profile Name	Role Description	Default Role	Customer Role Name	Role Code (Ex Libris use only)
2	Scheduling Manag	Scheduling Manager	Y	Staff	48894
3	Program Manager	Program Manager	N	Staff	113915
4	SSO - CMAUTH	Default	Y		86426
5	Clarivate SSO	Beta Tester		beta	101968
6	Dean's Office	Dean's Office	N	1st Year Staff	129401
7	Attendance Manag	Attendance Manage	Y	Staff	15711
8	API Programmer	API Programmer	Y	Outside	113916

Instructions | Customer Roles | App Roles | values

App Roles Sheet of the Excel File

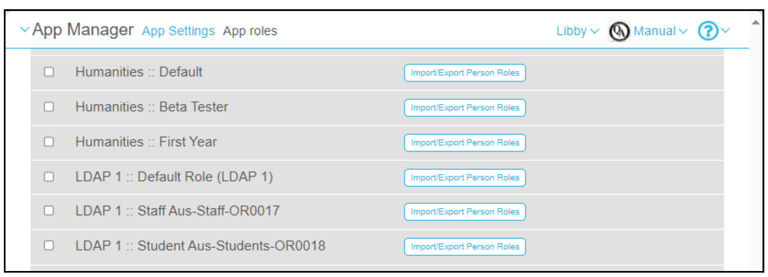
5. Save the updated file on your computer.
6. In the Import / Export Roles page (**App Settings > Enterprise Roles > Import / Export Roles**), select **Choose File**, and then select the file you saved.
7. Select **Submit**. The additional roles are added to the system, and the message **Data updated successfully** appears.

Assigning App Roles to Users in Bulk

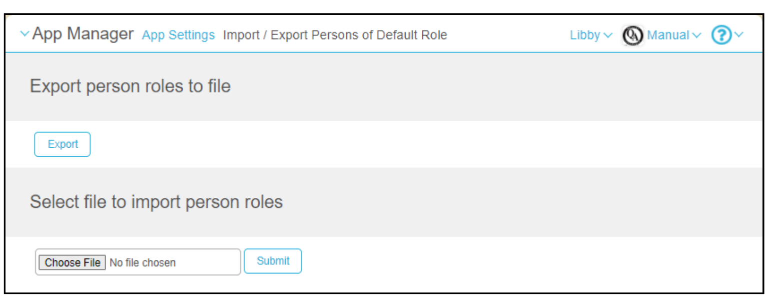
You can import a list of user email addresses in order to assign an app role to the users in bulk. In order to do this, you must begin by exporting the list of existing users to which the role is assigned, so that you can use this as a template for the list you will import. You can then add additional users to the template, and import it into the system to assign the role to those users. The template is an Excel file.

To assign a role to a list of users:

1. Navigate to **App Settings > Enterprise Roles > App Roles**. The *App roles* page opens.

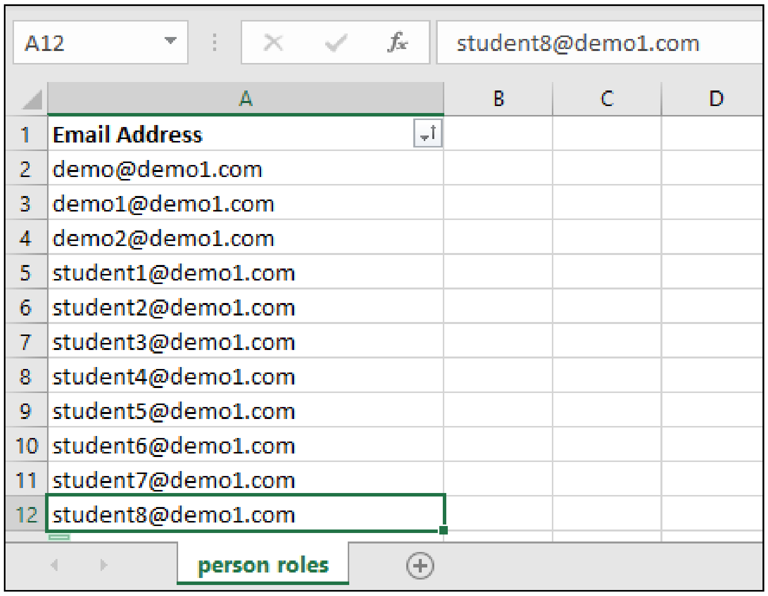


2. For the role you want to assign to the users in the list, select **Import/Export Person Roles**. The Import / Export Persons of Default Role page opens.



3. Select **Export**. An Excel file containing a list of the existing users who have the role is downloaded to your computer.

4. Open the file for editing. The list of users is shown.
5. Add additional users, as required.



List of Users with the Specified Role in the Excel File

6. Save the updated file on your computer.
7. In the Import / Export Persons of Default Role page, select **Choose File**, and then select the file you saved.
8. Select **Submit**. The additional users are assigned the role, and the message **Data updated successfully** appears.