Request an Alma Login or Login Update

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Login Processing Note

Processing time for new or updated logins take approximately two (2) business days. Also, before submitting a login request please ensure that the user has an active HarvardID and have claimed their Harvard Key. All personal logins will be created/updated in both production and sandbox versions of Alma.

Guidelines for Managers on Alma Logins

New library staff or student workers who are not using a shared circulation machine need their own Alma login in both the production and training sandbox sites. All work to update collections metadata must to be performed on a login specific to an individual for auditor compliance purposes. The only exceptions are authorizations for shared circulation desks, which can be a single shared login per terminal. Please follow the steps below to request the login.

Student workers who are using a shared circulation machine can use a login related to that specific circulation machine. They should be trained using the shared Alma login on either the production or sandbox sites.

Request a New Alma Login

1. **Staff Manager:** Contact your Alma Login Liaison; consult the list of Alma Login Liaisons & Login Approvers.
2. **Alma Login Liaison:** In consultation with the staff manager, determine the appropriate Login Settings for the staff member (see instructions in Login Settings below) and complete the Harvard Library Alma Login Request Form.
3. **Alma Login Liaison:** Sign the Harvard Library Alma Login Request Form and ask staff manager (i.e. approver) to sign as well. The form must be signed by both the liaison and approver.
4. **Login Liaison or Manager:** Submit form LTS Support by email or create a ticket directly in the LTS Support Center

Request an Alma Login Update/Change

1. **Staff Manager:** Determine what changes need to be made to the staff login. Use the list below to review roles and permissions. Possible changes include:
   a. Permissions need to be scoped to a new/different location.
   b. Permissions need to be added or removed.
2. **Staff Manager:** Work with your Alma Login Liaison to complete the Harvard Library Alma Login Request Form.
3. **Alma Login Liaison:** Confirm the changes and contact LTS Support to update the login as above.
   a. **Note:** When you submit the Login Request Form, please only include the changes to the login. If you do include the original form, please clearly identify the requested changes.

Login Settings & Form Sections

Permissions Notes

- All staff who have roles that include update of bibliographic records, holdings, and items can update all bibliographic records, holdings, and items in Alma. You will not need to designate holding or items permissions in this form.

Alma Logins for New Staff & Student Workers

When a new library staff person or student worker is hired, please request an Alma login at least 2 weeks ahead of when they will need to log in to Alma. It will take time for new staff/students to receive their HarvardID and have their base account information added to Alma (production and sandbox). You must specifically ask for a Sandbox account as well as Production, or only the Production account will be created.

Staff and student workers should complete training directly with managers to receive their Alma logins. Please see the Learning Alma - For Staff and Managers page for more information, which includes links to the Alma Overviews Online Course and hands-on training to cover this material with your new staff or student workers.
Fund access is limited in the funds themselves, by acquisitions library. These do not need to be indicated on the form.

Login Form Sections

Staff Information. This section is used to note if this is a new login, update, or delete request, and to collect contact information for the user.

Login Type. Alma logins can either be created with one of 3 default models (View, View with Analytics, or Systems) or be customized based on job functions. If the login is View Only, View Only with Analytics, or Systems (LTS use only), you do not need to add additional login information. Just complete the SIGNOFF section and submit.

Custom Logins. All custom logins have access to view functions; check off the additional roles needed for the staff member to perform job functions. Most users will need options from only a few role types. We ask that you select conservatively; LTS can update logins with additional role types if needed. Note that you need to supply additional information for any user assigned Acquisitions, Fulfillment, or Technical Services roles. In addition, a few special units who provide services for many libraries need to designate a Work Order Department.

Note: The Additional Role field should only be using in consultation with LTS. This field is used for custom permissions related to exceptional work.

Signoff: Please date and sign the form when complete, and have the staff manager approve the form by signing, prior to submission.

Alma Roles and Permissions

<table>
<thead>
<tr>
<th>Role Type</th>
<th>Operator</th>
<th>Operator Extended</th>
<th>Operator Extended Plus</th>
</tr>
</thead>
<tbody>
<tr>
<td>Acquisitions</td>
<td>Allows for purchasing, invoicing, and activation functions for physical and electronic materials. Includes ability to add and edit both physical and electronic inventory, bibliographic and holdings records.</td>
<td>All functions of operator, extended with the ability to cancel/delete orders.</td>
<td>All functions of operator extended, plus read-only access to acquisitions configurations.</td>
</tr>
<tr>
<td>Analytics</td>
<td>Allows for creation of analytics/reports</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Course Reserves</td>
<td>Allows for review and creations of citation requests, hold requests for items, updating items to reserves status, adding links to online content, removing materials from courses at the end of the semester</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Digital</td>
<td>Allows for management of digital inventory, as well as the ability to create and edit sub-collections. Currently available only after consultation with LTS.</td>
<td></td>
<td></td>
</tr>
<tr>
<td>E-Resourses</td>
<td>Allows for creation and update of licenses, as well as CDI management.</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Finance</td>
<td>Allows for invoice creation, approval and invoice assignment. Mainly available to Harvard Library Finance staff and library invoice approvers.</td>
<td>All functions of operator, plus ability to delete invoices. For Harvard Library Finance staff only.</td>
<td>All functions of operator, plus ability to allocate/transfer funds</td>
</tr>
<tr>
<td>Fulfillment</td>
<td>Note: This level is intended for shared circulation desk use only. Allows for charge, discharge, place hold requests, mark items as missing and open work orders. All functions of operator extended with override options, add, edit, delete request notes, change due dates, mark items as lost, manage pick lists and requests, accept cash, and view fines and fees.</td>
<td>All functions of operator extended, plus lookup of patrons by name, fulfillment administrator roles. If requesting this role for a student or temp worker, please include a note specifying business need.</td>
<td>All functions of operator extended, plus ability to perform record load or batch updates. Currently only available for staff in batch load pilot cohort.</td>
</tr>
<tr>
<td>Resource Management</td>
<td>Allows for creation and update bibliographic, holdings, and authority records, creation and update physical items, update of statuses on work orders, and addition of local portfolios (e.g. links to licensed one-off ebook purchases).</td>
<td>All functions of operator extended with deletion of bibliographic, holdings, and authority records and delete/withdraw physical items.</td>
<td>All functions of operator extended, plus ability to perform record load or batch updates. Currently only available for staff in batch load pilot cohort.</td>
</tr>
<tr>
<td>Resource Sharing</td>
<td>Allows for processing of borrowing and lending requests for ILLiad and Borrow Direct. For Widener Resource Sharing (BD/ILL) Staff only.</td>
<td>All functions of operator extended with assignment of resource sharing requests to operators. Also allows for deletion of Resource Sharing item records. For Widener Resource Sharing (BD/ILL) Staff only.</td>
<td></td>
</tr>
<tr>
<td>Technical Services</td>
<td>Allows for receipt of ordered materials, as well as the management of the status of in process items within the technical services department.</td>
<td></td>
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</tr>
<tr>
<td>Vendor Maintenance</td>
<td>Allows for vendor creation and update.</td>
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</tbody>
</table>

Functional Area Role Limits
Acquisitions Roles: Acquisitions roles must be limited to purchase order line owners. Please list the appropriate purchase order line owners for the user. A full list of acquisitions units is available here.

Circulation Roles: Circulation roles must be limited to "currently at" locations. Please list the appropriate circulation desks for the user. A full list of circulation desks is available here.

Technical Services Roles: Technical Services roles must be limited to "currently at" locations. Please list the appropriate technical services departments for the user. A full list of acquisitions units is available here.

Work Order Departments: Some special service units have unique work order departments. If you are a liaison at one of these department, please check off the appropriate Work Order department.