Centrally managed users for consortia with a network zone

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• Introduction
• Prerequisites
• An example using loan
• An example using request
Introduction

• For consortia with a network zone it is possible manage users in the network zone and distribute them to member institutions.

• The user record at the member institution is automatically retrieved from the Network Zone when required, for example:

  • When loaning to the patron
  • When placing a request for the patron
  • When the patron logs in using an external IdP (identity provider)
Introduction

• User roles are applied using the role assignment rules and are not distributed.

• Local segments (email address, phone numbers etc.) can still be managed at the member institutions

• When the SIS is run in the network the update process updates existing records at each member institution, but it does not create a new record for a user that does not exist in a member institution.
Introduction

• If the user record does not yet exist in the member institution then it is automatically retrieved from the Network Zone and created in the member institution when required, for example:

  • When loaning to the patron
  • When placing a request for the patron
  • When the patron logs in using an external IdP (identity provider)
Introduction

Institution A

Network Zone

ID=AliciaC613

Institution B

Institution C
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Prerequisites

- To set up this functionality in the Network zone define "Configuration > General > Collaborative > Networks > Network Zone Setup" so that the member institutions are defined as "Share Users = True"
Prerequisites

- Notify Ex Libris of the desired cross-consortia identifiers
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An example using loan

- User Alicia Chen identifier AliciaC613 exists in the network zone and not in the member institution “Alma University”

Here we see she is in the network institution
An example using loan

- User Alicia Chen identifier AliciaC613 exists in the network zone and not in the member institution “Alma University”

Here we see she is not in the member institution.
An example using loan

• Now in member institution ‘Alma University’ we will perform a loan to user Alicia Chen identifier AliciaC613.

Member institution where Alicia does not exist
An example using loan

• User is created in Alma University

Previously Alicia did not exist in member Alma University.

Note specifying that Alicia was copied from the network zone.
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An example using request

- As in the previous case when using a loan ...
- User Alicia Chen identifier AliciaC613 exists in the network zone and not in the member institution “Alma University”

Here we see she is in the network institution
An example using request

- As in the previous case when using a loan...
- User Alicia Chen identifier AliciaC613 exists in the network zone and not in the member institution “Alma University”

Here we see she is not in the member institution
An example using request

- In member institution “Alma University” barcode AS-13579 is on loan and a request will be made on it
An example using request

- We will add enter the patron ID and ‘enter’
An example using request

- The patron is retrieved from the network and created in the institution

Based on the user group of the patron (and fulfillment unit rule) the pickup location can be chosen
An example using request

- The patron now exists in the member

<table>
<thead>
<tr>
<th>Name</th>
<th>Account Type</th>
<th>Record Type</th>
<th>Job Category</th>
<th>User Group</th>
<th>Status</th>
<th>Expiration</th>
</tr>
</thead>
<tbody>
<tr>
<td>Alicia Chen</td>
<td>External</td>
<td>Public</td>
<td>-</td>
<td>Universal Borrower</td>
<td>Active</td>
<td>-</td>
</tr>
</tbody>
</table>
An example using request

- The patron in the member has a note specifying that it was copied from the network.

<table>
<thead>
<tr>
<th>Note Type</th>
<th>Type</th>
<th>User Viewable</th>
<th>Created By</th>
<th>Creation Date</th>
</tr>
</thead>
<tbody>
<tr>
<td>Note</td>
<td>General</td>
<td>LauraJ013</td>
<td>08/08/2018</td>
<td>13:45</td>
</tr>
</tbody>
</table>

*The user has been successfully copied from network zone.*