

## Setting Up and Editing User Accounts in Outlook OnLine

ILL staff members with Outlook OnLine User Admin permissions are able to manage their library's staff and patron user accounts in Outlook OnLine. Best practices and guidelines for setting up user accounts are included in this guide.

User accounts are managed in the User Admin tab:

- To create a new user account, click on “**Add a User**” in the left-hand menu.
- To edit an existing user account, click on “**Edit User Accounts**” in the left-hand menu and click Submit to view all user accounts.

### To view and edit your library's user accounts:

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1. Login to your library's Outlook OnLine **Admin** account.
2. Click on **Staff Dashboard > User Admin tab > Edit User Accounts > Submit** to view all accounts. If you don't see this tab, contact your OLOL Admin or the Outlook OnLine Administrative Centre for assistance.
3. To view which permissions have been enabled for an account, click on the account name.

[NOTE: Please **do not edit or delete the following accounts** unless instructed to do so: **guest, patron, ELN Admin, agstaff**]

### Recommended setup for ILL Admins:

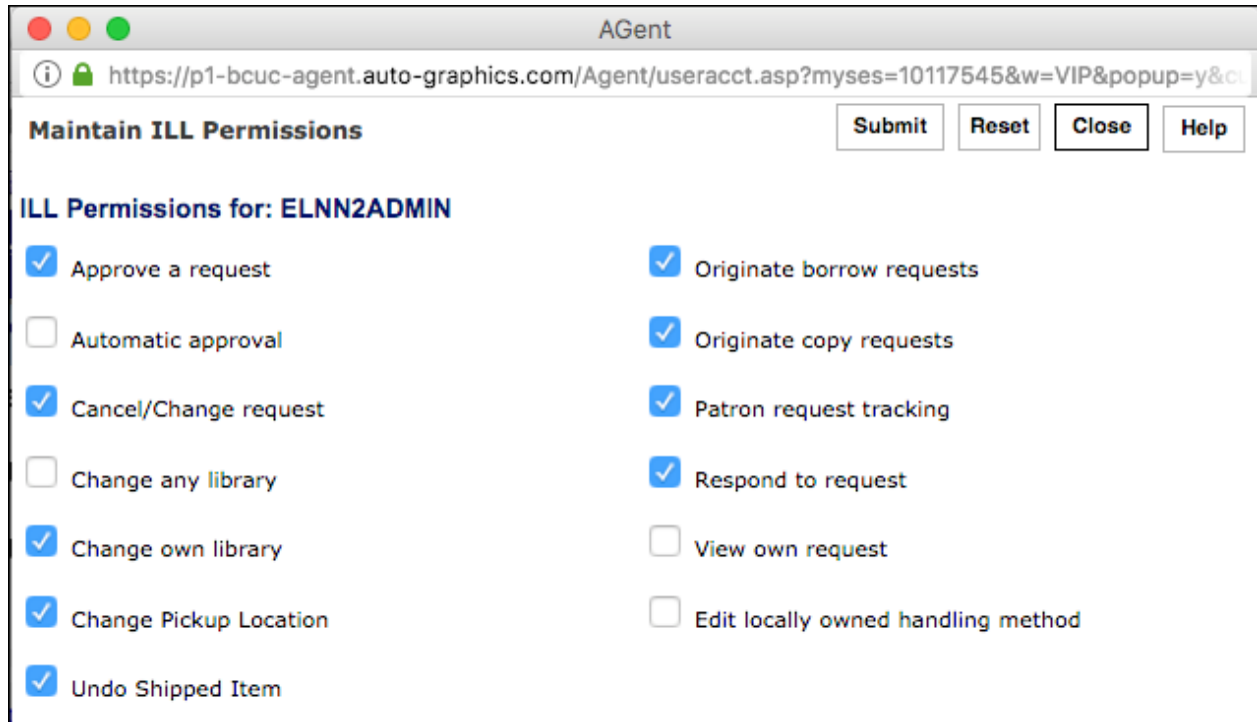
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1. Click on the **name of the account** and check-off the recommended permissions below. Option “CAT Staff” is optional.

|  |  |
|--|--|
| <input checked="" type="checkbox"/> CAT Staff          | <a href="#">AGCat Permissions</a>                  |
|  | <a href="#">Web HLD Permissions</a>                |
|  | <a href="#">CAT Admin Permissions</a>              |
| <input checked="" type="checkbox"/> ILL Staff          | <a href="#">ILL Permissions</a>                    |
| <input checked="" type="checkbox"/> PAC Admin          | <input type="radio"/> Regular Staff                |
|  | <input checked="" type="radio"/> Library SuperUser |
| <input type="checkbox"/> Staff User                    |  |
| <input checked="" type="checkbox"/> Statistics         | <a href="#">Statistics Permissions</a>             |
| <input checked="" type="checkbox"/> User Administrator |  |

2. Click on the **ILL Permissions** link (beside ILL Staff) and set as follows (see image below).
  - It is recommended that “Automatic approval” **not** be checked, to allow requests to be edited or deleted if they are created in error. More information in our FAQ here:
  - “Approve a request” should be checked to allow ILL Admins to alter or delete a request.

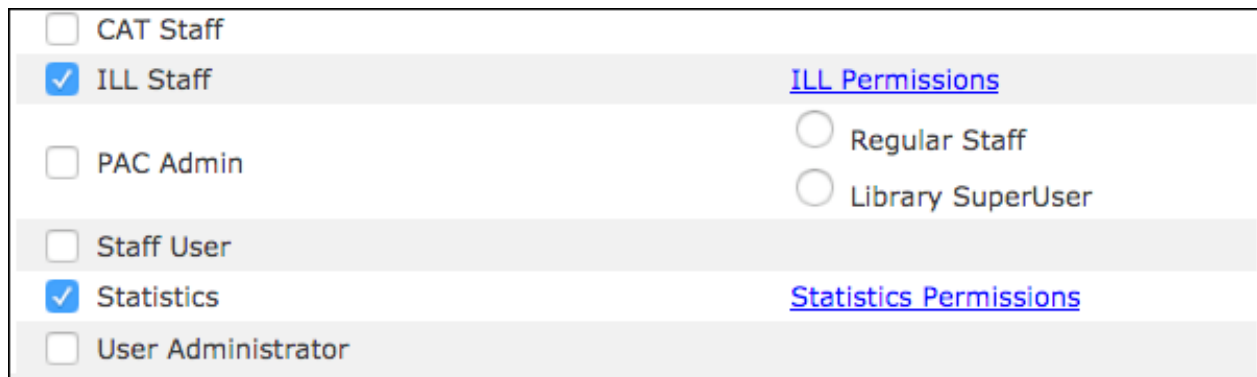
- Check-off “Undo Shipped” if you wish to allow Admin accounts to use the Lender > Undo Shipped option.
- According to Auto-Graphics, “View own request” is an obsolete option that you can check or uncheck.



3. Click **Submit** and **Close** to save your settings.

#### Recommended setup for ILL Staff:

1. Click on the name of the account and set as follows (statistics is optional for ILL Staff):



|  |   |
|--|---|
| <input type="checkbox"/> CAT Staff             |   |
| <input checked="" type="checkbox"/> ILL Staff  | <a href="#">ILL Permissions</a>         |
| <input type="checkbox"/> PAC Admin             | <input type="radio"/> Regular Staff     |
|  | <input type="radio"/> Library SuperUser |
| <input type="checkbox"/> Staff User            |   |
| <input checked="" type="checkbox"/> Statistics | <a href="#">Statistics Permissions</a>  |
| <input type="checkbox"/> User Administrator    |   |

2. Click on **ILL Permissions** (beside ILL Staff) and set as follows:

- It is recommended **not** to check “Automatic approval,” to allow requests to be edited or deleted if they are created in error.

- “Approve a request” should be checked to allow ILL staff to alter or delete a request.
- According to Auto-Graphics, “View own request” is an obsolete option that you can check or uncheck.

**Maintain ILL Permissions** Submit Reset Close Help

**ILL Permissions for: illstaff**

|  |   |
|--|---|
| <input checked="" type="checkbox"/> Approve a request      | <input checked="" type="checkbox"/> Originate borrow requests |
| <input type="checkbox"/> Automatic approval                | <input checked="" type="checkbox"/> Originate copy requests   |
| <input checked="" type="checkbox"/> Cancel/Change request  | <input checked="" type="checkbox"/> Patron request tracking   |
| <input type="checkbox"/> Change any library                | <input checked="" type="checkbox"/> Respond to request        |
| <input checked="" type="checkbox"/> Change own library     | <input checked="" type="checkbox"/> View own request          |
| <input checked="" type="checkbox"/> Change Pickup Location | <input type="checkbox"/> Edit locally owned handling method   |
| <input type="checkbox"/> Undo Shipped Item                 |   |

3. Click **Submit** and **Close** to save your settings.

**Recommended set up for Reference or Public Service / Branch / Circulation Staff (if needed):**

In many libraries, additional user accounts are required for library staff that submit ILL requests but do not need to edit or change request statuses.

1. Login to your library’s Outlook OnLine **Admin** account.
2. Click on **Staff Dashboard > User Admin tab > Add a User** to create a new user account. If you don’t see this tab, contact your OLOL Admin or the Outlook OnLine Administrative Centre for assistance.
3. Set the **User Type** as follows:

|  |   |
|--|---|
| <input type="checkbox"/> CAT Staff             |   |
| <input type="checkbox"/> ILL Staff             |   |
| <input type="checkbox"/> PAC Admin             | <input type="radio"/> Regular Staff     |
| <input checked="" type="checkbox"/> Staff User | <input type="radio"/> Library SuperUser |
| <input type="checkbox"/> Statistics            |   |
| <input type="checkbox"/> User Administrator    |   |

4. Create a **Username** and **Password**, and enter any additional information in the form as needed.

5. Click **Submit** to save and create the account.

#### How to edit account preferences:

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Preferences can be set for each account.

1. Login to Outlook OnLine with the username and password for the account that you wish to edit.
2. Click on the account name, eg. InfoStaff, in the top-right corner.
3. Update Your Settings > Your Profile as desired. Note: If you are unable to update your password here as desired, request your OLOL Admin updates your password directly in User Admin > Edit User Accounts instead.
4. You can also edit as desired under **Your Settings**:
  - **My Preferences** - your default sort, history search options etc.
  - **Your Quick Menu** - your Staff Dashboard > Quick Menu choices.
  - **Your Favorite Resources** - your default and visible Search Targets/Resources.
  - **Your Favorite Web Links** - custom quick URLs.
5. Click **Save** to submit your changes.

#### Additional FAQs:

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Additional FAQs are available on our website that include more tips on related aspects of editing and creating user accounts within Outlook OnLine. Check-out the following for more information:

- [How do I update or change my password?](#)
- [Why is the Track ILL Requests feature not showing for patrons?](#)
- [Why aren't all my statistics reports displaying?](#)
- [My Search Targets are configured correctly but still don't show as defaults when I'm logged in.](#)
- [Can I customise my collapsible Staff Dashboard?](#)
- [Why are my requests going straight to Unfilled?](#)
- [How do I edit my Quick Menu?](#)
- [Why can't I manually edit the lender list for my request?](#)
- [All Outlook OnLine FAQs.](#)

**Questions?** [Contact the the Outlook OnLine Administrative Centre.](#)