2. Administration by the Institution

There are a number of configuration elements which the Institution can maintain. Each of these System Administration functions is outlined below.

2.1 User Management

Any user with the 'User Manager' role can manage Users and their roles in eReserve Plus.

Understanding what these roles are and how they are used will help you decide the appropriate level of access for each new user of the Admin Interface.

- User Manager: This role gives the User the tools to create and manage User accounts
- Site Manager: This role is for staff who are required to manage integration records and settings for eReserve Plus. Typically this is given to the Learning Management System and Library Catalogue Administrators, allowing them to create and configure integrations with those systems
- Document Manager: This role is given to users who require full access for the day-to-day management of Readings and associated Requests
- Copyright Officer: This role includes access to all of the features of the Document Manager and additionally includes access to Reports (i.e. Audit and Utilisation)
- Insight API User: This role is available if the eReserve Insight API Feature Switch is enabled. This role is given to a user who is required to extract data using the eReserve Insights API.

You are not required to add Academic or Student accounts to the system as they will be automatically created when Academics or Students access a Reading List from the Learning Management System for the first time.

Please note that if the eReserve Support Team is instructed to refresh the Staging Environment from Production, all user accounts will be over-written by the user accounts stored in Production

> Training Documentation - User Management - Manage new starts and leavers

2.2 Teaching Sessions

Teaching Sessions are typically configured by a user with the 'Site Manager' role and provide a set of standard dates for Reading List availability in the system. Teaching Session records can be created, updated or retired.

The Start and End Dates of a Reading List are primarily set by Predefined Start and End Dates, usually reflective of Semester, Course Periods etc.

It is common for these dates to be different from the actual Semester dates so the Students can then access their Reading Lists before Semester officially starts. Some Institutions will set the Teaching Session dates to begin two weeks before the Semester officially starts and a month after the Semester ends. You Institution will have made a decision on the policy to employ during the initial implementation.

> Training Documentation - Manage Teaching Session Records

2.3 Schools

So that eReserve can generate meaningful Audit and Utilisation Reports, eReserve Plus groups the Courses into Schools. The Schools setup in the system means Academic Staff can select the appropriate School when they update a Citation Style for their own Course.

A user with the 'Site Manager' role can configure the Schools records, and later set the default Citation Style for each School once Citation Styles have been setup by the eReserve Team.

During the initial implementation, a list of Schools will have already been setup in eReserve Plus. If the School name changes, you can amend the label and the change will be reflected globally. If however, you want to report on the old School Name as well as the new School Name, you will be required to create a new record and retire the old record.

> Training Documentation - Manage School Records

2.4 Connecting the Learning Management System

Each instance of a Learning Management System at your Institution can be setup and connected to eReserve Plus using LTI by your LMS Administrator.

To manage and maintain the integration records, there is an LTI Guide for each LMS. The guide covers the setup of the LTI integration as well as the detail on how to setup the LMS for the eReserve Resource Linking Features.

Please note that if the eReserve Support Team is instructed to refresh the Staging Environment from Production, all Integration Records will be over-written by the Integration Records stored in Production and therefore, the configuration of the Staging records will be required to be reset. eReserve will take a screen-shot of the record prior to the copy-back and make it available to you to assist.

> Guide Documentation - LMS Integration Guide

2.5 Flat File Imports

Following the initial implementation of eReserve Plus, it is unlikely that Flat File Imports will be required, however if a bulk ingest of resources is required into eReserve Plus then there is a single mechanism to undertake different types of imports for Requests or Readings.

More detail on the pre-requisties of using the Flat File Import function is available in the Flat File Import Guide. The eReserve Support Team is available to mentor or coach staff through the Flat FIle Import process. Another aspect which may be useful is to supply the eReserve Team with the initial files which we can load into an alternative Environment and provide some initial verification of the files you have prepared.

> Guide Documentation - Flat File Import Guide

2.6 Customer Checklist

- Manage Users
- Manage Teaching Session records
- Manage School records
- Manage LTI Integration configuration records
- Undertake Flat File Imports