

User Groups

To configure user groups, you generally need the **User Administrator** or **General System Administrator** role. The process involves two main steps:

Defining the User Groups

1. Navigate to the **User Groups** code table:
 - **Configuration Menu > User Management > User Details > User Groups.**
 2. On this table, you can **add, edit, or delete** the desired user group types (e.g., create codes for "Undergraduate," "Graduate," "Staff," etc.).
 - *Note:* The User Group code **must not contain non-alphanumeric characters.**
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Mapping User Groups to User Record Types

After defining the groups, you must specify which **User Record Types** (Staff, Public, or Contact) can be associated with each group.

1. Navigate to the **User Record Type User Group** mapping table:
 - **Configuration Menu > User Management > User Details > User Record Type/User Group.**
2. On this mapping table, for each **user group** you created, you associate it with the relevant **user record type(s)**.
 - This ensures that when a user is created with a specific record type (e.g., Public), only the user groups mapped to the "Public" record type are available for selection.

Once configured, the user groups can be assigned to users when adding or editing their profiles, which may automatically trigger the application of role profiles or user registration terms if you've set up role assignment and registration rules.

Associating User Groups with TOUs

User groups can be associated with specific **Terms of Use (TOUs)** within your **Fulfillment Unit Rules**. This is how circulation policies are assigned to specific types of users.

The association takes place within a Fulfillment Unit's rule table, which dictates which TOU is applied to a transaction based on both the type of transaction (request, loan, etc.) and a set of criteria (fulfillment rules).

For instructions on how to create Fulfillment Rules, please see the WRLC Alma wiki page [Fulfillment Unit Rules](#).

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