Library Directory & Learning Calendar

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Managing Staff Lists in L2

One of the tasks that is most common for L2 is the addition and removal of staff. L2 allows a single user account to be connected, or affiliated, with a library location or a library agency.

Accounts and Affiliations

There are two concepts within L2 that are intertwined, yet still separate. These concepts are "Accounts" and "Affiliations".

Accounts in L2 are used to allow you to log in, register for events, and search the people directory. Every user needs to have a unique email address for their account. This email does not necessarily need to be the one that will be publicly displayed to other logged in users; more on that in a moment.

Affiliations are connections between a user account and a library agency, library location, catalog consortium, regional library system, or the Illinois State Library. Any user can create an affiliation between themselves and a library location. Additional affiliations, like those between a user and library agency, must be created by someone with sufficient privileges to do so.

Affiliations are the basis for permissions, and affiliations will dictate the actions that library staff are able to perform.

When a user is affiliated with a library location, they will appear on the "Staff List" for that location. When you affiliate a user with a location, their access is based on their "Role/Access Group". For a location there are three different Roles/Access Groups. These are:

- Manager
- Staff
- Board

The "Manager" role will allow the user to modify staff lists, create location affiliations, as well as remove affiliations. Additionally, users with the "Manager" role will be able to edit that location's information. A "Staff" member does not have any special privileges. The "Board" role is used for listing out Board/Trustee members for a location and agency.

Agency affiliations have a similar setup as a location affiliation. Instead of three roles, there are only two Roles/Access Groups for an agency affiliation. These Roles/Access groups are:

- Admin
- Manager

The "Manager" Role/Access Group on an agency affiliation does not have any access to modify the agency information. This role is good to use when you want to be able to list Job Categories/Responsibilities as well if they are a contact.

The "Admin" Role/Access Group on an agency affiliation provides that user the ability to edit agency-level information as well as manage affiliations for the agency. The "Admin" Role/Access Group also gives the user access to edit all locations and all location affiliations. This is helpful for School District Librarians who may oversee multiple school libraries. For School District Librarians, this agency-level affiliation should be created in addition to their location-level affiliation. Other positions that should have agency affiliations are the Director, Deputy Director, Assistant Director, Department Managers who oversees multiple locations, School Superintendent.

There is one thing to consider before creating an affiliation. That item is whether or not a staff member already has an L2 account.

Search for an existing user

Before having the user create an account, you may want to make sure that the user does not already exist. This is possible by performing the following steps:

1. Log in to L2 at https://librarylearning.org/.
2. In the upper right corner click on the "Directory" menu item to bring up the directory search.
3. Click on the "People" button to bring up People Search.
4. In the "Search by Name/Keyword" box, enter in the staff member's email. The search is keyword, so partial words should bring up the proper results.
5. Click the "Search" button, or press the "enter" key, to perform your search.

If there are any results, then the user already has an account in L2 and do not need to create an account. If you do not get any results, then the user will need to create an account at https://librarylearning.org/. It is recommended users create their own L2 account as their email address must be verified by a time sensitive link that is emailed to the user. If user does not verify the email address, the account is automatically deleted. See "Creating a User Account" at https://librarylearning.org/help for more information on creating a L2 user account.

Creating a Library Affiliation

Affiliations are links between an individual user and an entity within L2. These entities can include Groups, Locations, Agencies, Catalog Consortia, Regional Library Systems, or the Illinois State Library. The two that we will focus on are Location affiliations and Agency affiliations.

When a new account is created the user will be prompted to add a library location by selecting the button "affiliate with a location" during the course of creating a L2 user profile.

We will look at creating affiliations between users and locations, as well as between users and agencies. The procedure for creating both is very similar, but subtly different.

Agency Affiliation

An "Agency" affiliation is a relationship between a particular user and an agency. To add an agency affiliation, perform the following steps:

1. Log in to L2 at https://librarylearning.org/.
2. In the upper right corner, click on "Directory" to open up the directory search.
3. Under "Search by Keyword", enter in the name of the library that you want to create an affiliation between a staff member and the library agency. The search is keyword, so partial words should bring up the proper results.
4. Click on one of the Library locations that belong to the agency that you wish to add an agency affiliation to.

5. Click on the "Agency" name (purple link) above the location name to get to the Agency page.
6. Towards the top of the page, click on the "Affiliations" tab to open the existing affiliations for the location.
7. Under "Add an Affiliation" section, verify the "published" checkbox is checked, it should be checked by default.
8. Under "User", type in the user's name to bring up a list of matches. This could be the email address, first name, or last name of the user.
9. Select the appropriate staff member's account that you want to affiliate with this agency.
10. Under "Role/Access Group", select the appropriate level for the agency. This level indicates their access level for that agency.
11. In the "Job Title" field, enter in the user's job title.
12. In the "Email" field, enter in the email that should be used to contact the staff member. This does not need to be a unique entry. This email address will be shown to other logged in L2 users.
13. Optionally enter in the "Phone" number for the staff member.
14. Optionally enter in the "Fax" number for the staff member.
15. If the staff member is the primary administrator, click the "Primary Administrator" checkbox .(Note Primary Administrator is reserved for individuals in charge of the library, Library Director or School Superintendent.)
16. Click the "Save" button at the bottom of the page to save the staff member's affiliation with the agency.

Once you have added the necessary affiliation saved, the user should appear in the "Staff List" of the agency as well as the "Affiliations" list at the top of the page.

Removing an Affiliation

It is inevitable that at some point a staff member will leave the library. When this occurs their L2 affiliations will need to be removed. As mentioned above, there are primarily two types of affiliations, location affiliations and agency affiliations. Most staff members may only be associated with a library location. However, it is possible that they will also be affiliated with an agency.

Removing a Staff Member from a Location

Removing a staff member from a location is a straightforward process. There are three different methods to accomplish this.

Method 1

To remove a staff member from the staff member list of a library location, perform the following steps:

1. Log in to L2 at https://librarylearning.org/.
2. In the upper right corner, click on the "Directory" menu item. This should bring up the "Libraries" search.
3. In the "Search by Keyword" textbox, enter in the name of the library location that the staff member is affiliated with. The search is keyword, so partial words should bring up the proper results.
4. Click the "Search" button, or press the "enter" key, to perform your search.
5. Click on the appropriate library location from the search results. This should bring you to the library location's page.
6. At the top of the page, click on the "Affiliations" button to bring up the list of affiliations with that location.
7. In the "Affiliations" section at the top, locate the staff member that you wish to remove.
8. Click the "Remove" button next to the staff member's name. This will bring up a confirmation page.
9. On the confirmation page, click the "Delete" button to delete the staff member's affiliation with the location. Otherwise click "cancel" to not delete the affiliation.

NOTE: Once an affiliation is deleted, it cannot be recovered. If the user needs to be affiliated with the location again, the affiliation will need to be re-created.

Method 2

The second method for removing a staff member from an affiliation is similar to method 1. To use method 2, follow these steps:

1. Log in to L2 at https://librarylearning.org/.
2. In the upper right corner, click on the "Directory" menu item. This should bring up the "Libraries" search.
3. Click on the "People" tab to bring up the people search.
4. In the "Search by Name/Keyword" textbox, enter in the staff member's name or email address.
5. Optionally, begin typing in the "Library Affiliation" box to limit the location and select the proper location when it appears. Partial words should bring up the proper results.
6. Click the "Search" button, or press the "enter" key, to perform your search.
7. Locate the appropriate user and library location from the search results.
8. Click on the library location under the "Library" column to bring up the library location page.
9. At the top of the page, click on the "Affiliations" button to bring up the list of affiliations with that location.
10. In the "Affiliations" section at the top, locate the staff member that you wish to remove.
11. Click the "Remove" button next to the staff member's name. This will bring up a confirmation page.
12. On the confirmation page, click the "Delete" button to delete the staff member's affiliation with the location.

NOTE: Once an affiliation is deleted, it cannot be recovered. If the user needs to be affiliated with the location again, the affiliation will need to be re-created. Users with their accounts marked as "Private" are not viewable under Method 2, please see Method 1.

Method 3

The third method for removing an affiliation is similar to the other methods. To remove an affiliation, perform the following steps:

1. Log in to L2 at https://librarylearning.org/.
2. In the upper right corner, click on the "Directory" menu item. This should bring up the "Libraries" search.
3. Click on the "People" button to bring up People Search.
4. In the "Search by Name/Keyword" box, enter in the staff member's first name, last name, or email address.
5. Optionally, begin entering in the library location in the "Library Affiliation" and select the appropriate library location. The search is keyword, so partial words should bring up the proper results
6. Click the "Search" button, or press the "enter" key, to perform your search.
7. Locate the appropriate user and library location from the search results.
8. Click on the appropriate affiliation for the staff member in the "Person" column. This will bring you to the staff member user's page.
9. On the "User's Page" will be listed any affiliations for the user to which you have access. Click the "Edit" button next to the affiliation for the staff member and the proper location. This will bring up the "Affiliation Edit" page.
10. On the "Affiliation Edit" page, scroll down to the bottom of the page.
11. Click on the "Delete" button to bring up a confirmation page.
12. On the "Confirmation Page", click on the "Delete" button to confirm that you want to delete the affiliation.

NOTE: Once an affiliation is deleted, it cannot be recovered. If the user needs to be affiliated with the location again, the affiliation will need to be re-created. Users with their accounts marked as "Private" are not viewable under Method 3, please see Method 1.

Removing a Staff Member from an Agency

Removing a staff member from an agency is a straightforward process. There are two different methods to accomplish this.

Method 1

To remove a staff member from the staff member list of an agency, perform the following steps:

1. Log in to L2 at https://librarylearning.org/.
2. In the upper right corner, click on the "Directory" menu item. This should bring up the "Libraries" search.
3. In the "Search by Keyword" box, enter in the name of a library location that the staff member is affiliated with. The search is keyword, so partial words should bring up the proper results.
4. Click the "Search" button, or press the "enter" key, to perform your search.
5. Click on the appropriate library location from the search results.
6. Directly above the name of the library location is the agency's name. Click on this to bring up the agency page.
7. At the top of the page, click on the "Affiliations" button to bring up the list of affiliations with that agency.
8. In the "Affiliations" section at the top, locate the staff member that you wish to remove.
9. Click the "Remove" button next to the staff member's name. This will bring up a confirmation page.
10. On the confirmation page, click the "Delete" button to delete the staff member's affiliation with the agency.

NOTE: Once an affiliation is deleted, it cannot be recovered. If the user needs to be affiliated with the agency again, a new affiliation will need to be created.

Method 2

The second method for removing an affiliation is similar to the other methods. To remove an affiliation, perform the following steps:

1. Log in to L2 at https://librarylearning.org/.
2. In the upper right corner, click on the "Directory" menu item. This should bring up the "Libraries" search.
3. Click on the "People" button to bring up People Search.
4. In the "Search by Name/Keyword" box, enter in the staff member's first name, last name, or email address. The search is keyword, so partial words should bring up the proper results.
5. Click the "Search" button, or press the "enter" key, to perform your search.
6. Click on the appropriate affiliation for the staff member in the "Person" column. This will bring you to the staff member user's page.
7. On the "User's Page" will be listed any affiliations for the user to which you have access. Click the "Edit" button next to the affiliation for the staff member and the proper agency. This will bring up the "Affiliation Edit" page.
8. On the "Affiliation Edit" page, scroll down to the bottom of the page.
9. Click on the "Delete" button to bring up a confirmation page.
10. On the "Confirmation Page", click on the "Delete" button to confirm that you want to delete the agency affiliation.

NOTE: Once an affiliation is deleted, it cannot be recovered. If the user needs to be affiliated with the location again, the affiliation will need to be re-created. Users with their accounts marked as "Private" are not viewable under Method 2, please see Method 1.

Contact Us/L2 Help

https://librarylearning.org/help