

MANUAL SLSPDIRECTORIES

<https://directories.slsp.ch/>

SLSP, 23 February.2023

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1. The URL of SLSPdirectories

You can access SLSPdirectories via <https://directories.slsp.ch/>

2. Aim of SLSPdirectories – What does SLSP want to achieve with the tool?

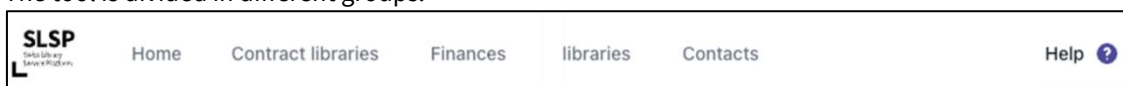
The new address tool SLSPdirectories is designed to simplify the entire address management process and keep it up to date at all times. SLSP customers update the information themselves directly via a simple form.

The new tool should in particular

- ensure that addresses are always up to date with very little effort, without SLSP clients having to open a request in SLSP Support for changes of address and persons.
- Ensure that communication is sent to the correct contact person depending on the topic.
- Clearly define the contact persons and responsibilities for SLSP clients according to the subject area.
- Give the institutions a better overview of the communication with SLSP, i.e. which persons are the contact person and thus responsible for each topic (Bursar contact person, contact person for contractual topics, etc.).

3. Structure of the tool

The tool is divided in different groups:



- **Contract partners:** The organisation that has a service contract with SLSP, incl. predefined important contacts.
- **Finances:** Contact details of the financial services that work with SLSP within an organisation.
- **Libraries:** Contact details of all libraries within an organisation. There is also an overview of the booked products/services per library.
- **Contacts:** Role, name, address and contact information of persons within the library.
- **Help:** The manual for download in four languages

4. Authorisation level – who is allowed to do what?

An edu-ID from Switch is required for the login. This is the standard account for many internal online services at Swiss universities. In this tool, all authorisations run via the edu-ID. All employees of our customers who also work in the SLSP system should have a Switch edu-ID account.

Within an institution, the following authorisation levels exist for SLSP directories:

- a) **Superuser:** SLSP has defined one superuser per SLSP contract partner. This superuser is the contact person for SLSP with regard to addresses and contacts and has access to all content belonging to their own service contract, including all institutions included in it. The superuser must appoint the next lower authorisation levels (see Finance-Maintainer and, if required, superuser 2.). The superuser also defines the Head of library, Operational technical contact, Technical library contact, Contact Account Management and Contract Representative 1 (see following chapter).
The superuser can adapt and change everything. Changes concerning the superuser itself can also be adapted by the superuser itself.
- b) **Superuser 2:** The Superuser 2 can be defined and used by Superuser 1. This superuser has the same authorisations as superuser 1, but there is no obligation to define a superuser 2. These options are to be made available to the institutions based on various feedback on SLSP directories.
- c) **Finance Maintainer:** The Finance Maintainer is also defined by the Superuser. If necessary, the superuser can also be the Finance Maintainer at the same time. The Finance Maintainer is responsible for the "financial topics". This means, for example, that he/she must determine which person from the respective libraries is the contact person for the Bursar (Bursar contact) or processes the reports

Overview of authorisations, see Annex 1: Rights

5. Setup of the tool – what can the tool do?

The tool has the following levels:



- a) **Home** (Quicksearch): The start screen contains a simple search function in which the associated libraries and contacts can be searched for. Both the superuser and the maintainer can use this function.

The Home page features a dark blue header with the word "Home". Below it is a white box with the title "Quicksearch" and the subtitle "Search for libraries, finances and contacts". At the bottom of this box is a search input field with a magnifying glass icon and the text "Search".

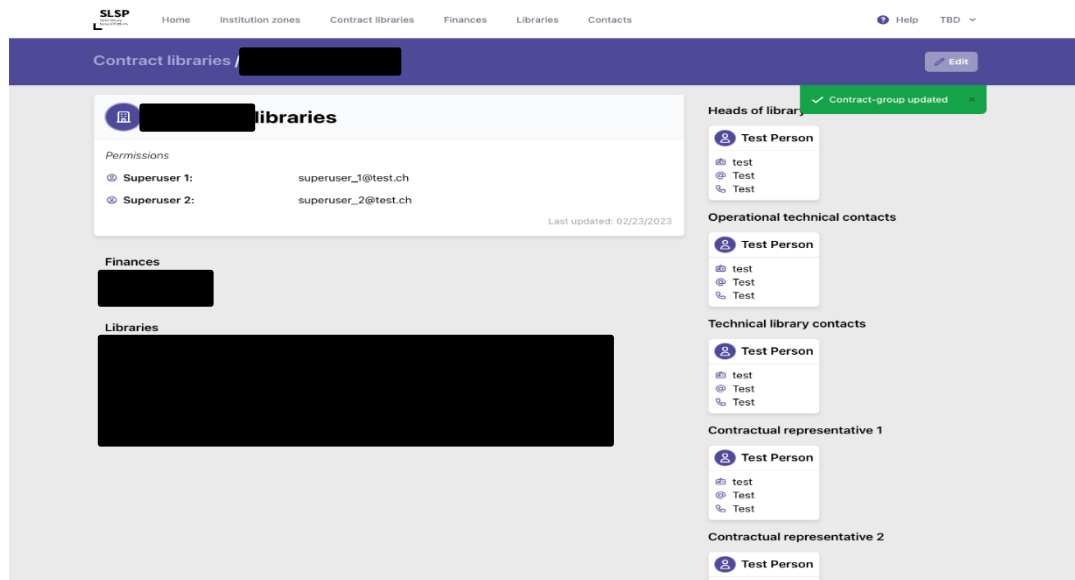
- b) **Contacts**: If necessary, new contacts can be added to the library at the Contacts level. Attention: the role assignment (e.g. Head of library, operational technical contact, billing contact etc.) is done in edit mode on the "contract library" and "Finances" level.

The Contacts page has a dark blue header with the text "Contacts /". Below it is a white form with the following fields: Position, First name, Last name, Email, and Phone. At the bottom left of the form is a red link "Delete contact", and at the bottom right is a blue button "Update contact".

Attention: To avoid duplicates, the people search finds the contact data of a person if they have already been entered in another role or in another library. The data can then be transferred. A second entry is not necessary.

Contacts can be deleted by switching to "Edit mode" and deleting the contact at the bottom left. Note that this only works for non-affiliated contacts.

- c) **Contract libraries:** The Contract library level is only visible to superusers. If you click on your institution, the following screen appears (test example):



Here you will find an overview of how many libraries included in the service contract have booked the respective services. *Please note: This list is not yet published at the time of publishing this manual (23 February 23), as it is not yet complete. It will be published as soon as possible.* The superusers of this contract group are also displayed.

Contract libraries / [redacted] **Show**

Name
[redacted]

Permissions

Superuser 1
superuser_1@test.ch

Superuser 2
superuser_2@test.ch

Info: Superusers can login via edu-ID and update all libraries and contacts of this contract library. Additionally they can define information-maintainers for specific libraries.

Delete contract library **Update contract library**

Contacts
Search for contacts and affiliate them by clicking the plus button. Affiliations can be deleted by clicking on the red minus icon.
Note: affiliations are updated immediately without having to save them!

Search [] Head of library []

Contact affiliations

Name	Type
Test Person	Contact Account Management
Test Person	Technical library contact
Test Person	Operational technical contact
Test Person	Head of library
Test Person	Contractual representative 2
Test Person	Contractual representative 1

Head of library: Contact person for formal content (contractual) and for general exchange at management level.
Operational technical contact: Contact person for Swisscovery (Alma and Primo VE), i.e. Contact person to be contacted by SLSP if there are questions about the configuration and processes in Alma or who takes care of the blogposts addressed to the Operational technical contact persons.
Technical library contact: Technical contact person for all 'technical' content apart from Alma and Primo VE, i.e. for questions about IT, network, PC support, etc. (if required are generic mail addresses also accepted)
Contractual representative 1: Contact person authorised to sign the (service) contract on behalf of the institution (this contact person can be identical with other contact persons)
Contractual representative 2: Second contact person authorised to sign the (service) contract on behalf of the institution (this contact person can also be identical with other contact persons; the second Representative contact is not necessarily needed)
Contact Account Management: Contact person for Staff User Logins in Alma (named user) and Logins in SLSPhere. They are responsible to keep the Logins updated. Twice a year they get a reminder.
Please note: one contact may also occur for multiple contact types. Please fill them in individually, even if it is the same person.

The description of the contact types (screenshot on the far right) appears by clicking on “? Contact affiliation”

If necessary, a second superuser can be added under "Edit" by inserting their edu-ID in the corresponding field.

The superuser is responsible for the data of this contract library. This also includes defining and maintaining the predefined contact details (Head of library, Operational technical contact, Technical library contact, Contact Account Management and Contract Representative 1 (and 2 if required)). A definition of these contact types can be found directly in the tool, next to these entries (“? Contact affiliations”).

The superuser adds ("Edit" > column on the right) the predefined contacts (Head of library, Operational technical contact, Technical library contact, Contact Account Management and Contract Representative 1).

Attention: These contacts must be entered in advance at the "Contacts" level. The superuser is responsible for the respective data of his own contract library.

At the bottom of the page you will find a direct link and listing to "Finances" and "Libraries": the respective financial entities ("legal entities") and the libraries belonging to your service contract are listed there.

- d) **Finances:** The "Finances" level is seen by both the Superusers and the Finance Maintainer.

Legal Entity / [Redacted] Library Edit

Location: [Redacted]

VAT Number: [Redacted]

Language: D

Invoice-Reference:

Bursar Settlement Reference:

IBAN: [Redacted]

Reports

☒ Weekly Late Payment-Report: No

☒ Monthly Undeliverable Invoice-Report: No

☒ Yearly Open Items-Report: No

Optional Reports

☒ Closed Without Payment-Report: No

☒ Monthly Open Items-Report: No

Last updated: 11/21/2022

Primary billing contact

Denis Weibel
zeugster@example.com
0456459360

Secondary billing contact

Deborah Gloor
dario.wenger@example.net
+41(0)877487247

Undeliverable Invoice-Report

Deborah Gloor
dario.wenger@example.net
+41(0)877487247

Denis Bühlmann
flavio.kaufmann@example.org
079 036 07 14

Contract partner

[Redacted] libraries

Libraries

[Redacted]

[Redacted]

Legal Entity [Name] **Library** [Show]

Name
[Redacted]

Invoice-Reference
[Redacted]

VAT Number
[Redacted]

Language
D

Location

Address line 1
[Redacted]

Address line 2
Leitung Bibliothek

Address line 3
[Redacted]

Street
[Redacted]

Post office box
[Redacted]

Postal code
[Redacted]

City
[Redacted]

For Bursar customers only

Bursar Settlement Reference
[Redacted]

IBAN
[Redacted]

Services

☐ Weekly Late Payment-Report

☐ Monthly Undeliverable Invoice-Report

☐ Yearly Open Items-Report

Optional Reports

☐ Closed Without Payment-Report

☐ Monthly Open Items-Report

Permissions

Finance Maintainer
edu-ID E-Mail [Redacted]

Info: Finance Maintainers can login via edu-ID and update the information and contacts of this legal entity and all the corresponding libraries.

Contacts ✓ Contact added

Note: relationships are updated immediately without having to save them!

Search contact Undeliverable Invoice-Report

Name	Relationship
Deborah Gloor	Primary billing contact
Deborah Gloor	Secondary billing contact
Deborah Gloor	Late Payment-Report
Deborah Gloor	Undeliverable Invoice-Report
Deborah Gloor	Closed Without Payment-Report
Deborah Gloor	Open Items-Report
Denis Bühlmann	Undeliverable Invoice-Report
Denis Weibel	Primary billing contact

The Finance Maintainer can be set by the Superuser as follows:

- 1) first click on the name of your institution,
- 2) select "Edit" at the top right,
- 3) in "editable" mode, enter the edu-ID of the Finance Maintainer at the bottom (see screenshot at the bottom right).

The assigned Finance Maintainer adds ("Edit" > right column) the predefined contacts (see screenshot above).

Attention: These contacts must be entered in advance at the "Contacts" level. The Finance Maintainer is responsible for the respective financial data.

- e) **Libraries:** The "Libraries" level contains all the libraries assigned to the service contract. By clicking on it the following is displayed:

The screenshot shows the 'Libraries' page in the SLSP interface. The page has a purple header with the text 'Libraries /' and a 'Add' button. Below the header, there is a sidebar with a menu icon and a search bar. The main content area displays a form for library details. The form includes fields for 'Library code', 'Website', 'Location', 'Email', 'Phone', and 'Language' (set to 'ger'). Below these fields is a section titled 'Services' with a list of services and their status (Yes/No). The services listed are: Basic fee, Bursar (included in basic fee), Courier, Integration external data sources, Interface Cooperative Library, Sandbox Premium, SLSPKey, SLSPCUG, SLSPStorage, SLSPBibliographies, Additional Local View, SLSP Web-Selfcheck, and Additional Space SLSPhere. The status for all services is 'No'. At the bottom of the form, there is a 'Contract partner' field and a 'Finances' field. The page also shows 'No contacts' on the right side. A small text at the bottom right of the form indicates 'Last updated: 11/21/2022'.

The specific data of the respective library, including the associated contract partner and finance entity, are displayed. A list of the booked services is also displayed. *Please note: This list is not yet published at the time of publishing this manual (23 February 23), as it is not yet complete. It will be published as soon as possible.*

For Bursar users: Under "Contact for Endusers on Bursar-invoices", the contact that appears for the end user on the corresponding Bursar invoice can be specified.

Libraries / [REDACTED]

Name
[REDACTED]

Library code
[REDACTED]

Email
[REDACTED]

Phone
[REDACTED]

Website
[REDACTED]

Language
ger x v

Contact for end-users on Bursar invoices
(Phone / Email)
[REDACTED]

Opening hours
[REDACTED]

Location

Address line 1
[REDACTED]

Address line 2
LAA F-H

Address line 3
[REDACTED]

Address line 4
[REDACTED]

Street
[REDACTED]

Post office box
[REDACTED]

Postal code City
[REDACTED]

Permissions

Library Maintainer
edu-ID E-Mail +

Info: Library Maintainers can login via edu-ID and update the information and contacts of this library.

Update library

6. Tasks Superuser / Maintainer – first steps as Superuser

First, the superuser specified by the SLSP defines the Finance Maintainer and a second superuser if required. To do this, they enter the respective edu-ID e-mail address of the corresponding persons (according to the steps described above).

The superuser then checks the entries in his or her own "contract library" and the corresponding libraries and, if necessary, defines the second superuser and the corresponding contact persons (according to 5(e)). In the medium and long term, the superusers keep the contact data up to date.

The Finance Maintainer then checks the entries of the own Finance Entity and defines the contact persons (according to 5(c)). In the medium and long term, the Finance Maintainer keeps the contact details up-to-date.

7. Questions

We will also be happy to answer your questions via [SLSP Support](#), Functional Area "General" or, if you do not have an SLSP Support account, via e-mail to contracts@slsp.ch.

Annex 1: Rights

