



HOW TO USE AUTO-LOGIN PROCEDURES FOR THE GROUP COORDINATOR

PURPOSE OF THIS DOCUMENT

This document is a resource to the Group Coordinator who wants to learn about the auto-login procedures on the AALAS Learning Library. Another document ([Auto-login Procedures Guide](#)) has more details on how the auto-login operates and is a resource for IT personnel who will implement auto-login to the AALAS Learning Library on behalf of an institution.

WHAT IS AUTO-LOGIN?

Auto-login is an automated login that an institutional group can use to fully automate how group members are enrolled in the ALL, are logged on, have an account assigned, and have contact information updated. These procedures are the enrollment of a new member, the returning login of a member who was enrolled previously, and an administrative enrollment of a new member by designated personnel (other than the Group Coordinator). Auto-login operates via the transmission of web form data sent by a secure connection (https) from the institution's server to the AALAS Learning Library server when a link is clicked on the institution's website. The web form data include login information, such as username and password, and contact information for the group member. The institution's web page must provide a link that transmits the web form data used to log on the group member and submit contact information. The web form data are typically derived from a database residing at the institution.

BENEFITS OF AUTO-LOGIN

1. Institutional personnel can log on the AALAS Learning Library effortlessly: A group member does not have to create or remember a username and password. His/her entry into AALAS Learning Library (in a logged-in state and with an account assigned) follows automatically upon clicking a link on the institution's website. Also, the contact information can be updated automatically.
2. The Group Coordinator is freed up from management of the access of group members to the AALAS Learning Library, e.g., not having to add members, assign accounts, and communicate login information to group members.
3. AALAS Learning Library training data may be more easily integrated with data from other sources within the institution because employee ID information can be associated with a group member's record, custom fields may be defined by the institution, and spreadsheet column headers may be customized in downloaded transcript reports.

REQUIREMENTS FOR IMPLEMENTING AUTO-LOGIN

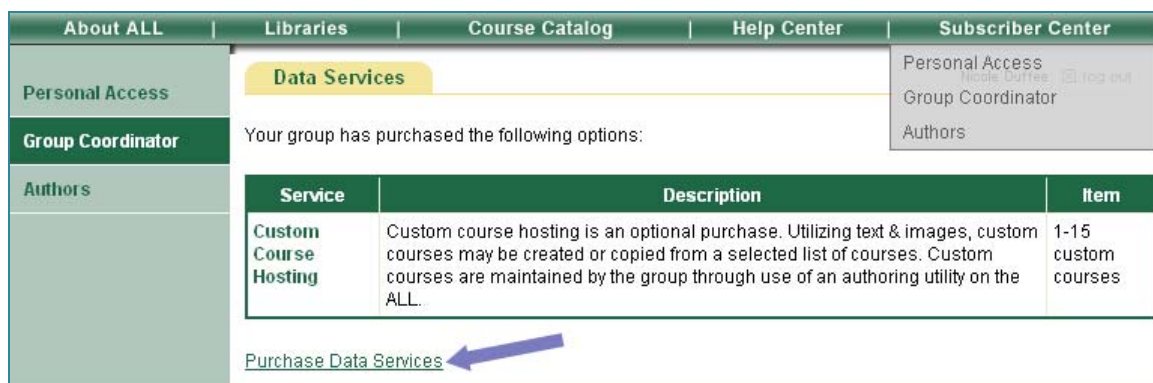
1. Institutional IT support must be available for coordinating the database communications and web page changes within the institution.
2. The annual fee must be paid for Automated Data Services. This fee provides services, available only to institutional groups, of auto-login and automatic downloads of training data. This fee is tied to the annual cycle of account purchases, i.e., having the same anniversary and expiration dates as accounts.

STEPS FOR THE GROUP COORDINATOR TO SET UP AUTO-LOGIN

1. Purchase Automated Data Services and pay the fee.
 - a. Automated Data Services may be ordered at the time when accounts are purchased.
 - b. Automated Data Services may be ordered at any time after accounts are purchased via a link on the Group Coordinator Menu page.
 - i. Under the Purchases section, click the Data Services link (screenshot below.)



- ii. The ALL displays any data services already purchased (screenshot below). A link is provided to purchase Automated Data Services.



iii. Select auto-login and complete the purchase (screenshot below).

Select	Service Description	Fee for AALAS Institutional Member, Commercial Member
<input checked="" type="radio"/>	Auto-login: 1. Users can be added and log on automatically from your institution's portal; 2. Training data can be downloaded automatically by your server. (Available to institutional groups only)	\$200
<input type="radio"/>	I do not want to purchase this option at this time.	-

2. Retrieve the institution's Security Key and provide it to the IT staff coordinating the auto-login implementation.

a. When the automated data services are purchased, a set-up page is used to display a Security Key for auto-login, via the Group Coordinator Menu page (two screenshots below; in the second screenshot the arrow labeled *a.* points to the Security Key).

b. Edit Security Key: A new Security Key may be generated by clicking the link above (arrow labeled *b.*). A new Security Key will be generated by the ALL when the Submit button is clicked (screenshot below). The event of generating a new

Security Key should be closely coordinated with the IT staff responsible for implementing the auto-login procedure.

The screenshot shows a web interface for editing a security key. The page title is "Edit Security Key". The current security key is displayed as "92479822-45D1-4842-8C7C-9A302F6CAD2B". Below the key, there is a "SUBMIT" button and a "CANCEL" button. A blue arrow points to the "SUBMIT" button. The page also contains instructions on how to generate a new key and a warning that existing autologin procedures will fail until the new key is implemented.

3. Set the use of the auto-login ID, if desired.
 - a. The auto-login ID is an optional data field for the institution to use for personnel ID. That is, the auto-login ID is intended to associate an individual with an institution's employee ID.
 - b. The auto-login ID is not displayed to the group member (e.g., in the My Profile page), and auto-login ID cannot be edited by a group member or the Group Coordinator.
 - c. The auto-login ID and password may be used as an alternative login, in place of username and password.
 - d. The Group Coordinator sets an option whether to use auto-login ID via the Auto-Login Security Key and Parameters link via the Group Coordinator Menu page.
 - i. The status of the use of auto-login ID is displayed: YES or NO (screenshot below, arrow labeled *a*).
 1. If set to YES, the login procedures for group members will require autologinID and password.
 2. If set to NO, the login procedures for group members will require username and password.

Personal Access

Auto-Login Parameters Nicole Duffee [log out](#)

Group Coordinator This page is used to provide information for autologin procedures.

Authors Group ID: 6656

Security Key: 92479822-45D1-4842-8C7C-9A302F6CAD2B ([Edit security key](#))

Auto-login ID: Use of the auto-login ID for your group is set to **No**. Auto-login ID is a string variable that can contain up to 50 characters and no spaces. Auto-login ID can be used in place of the username during the auto-login procedure. [Click here to change your Auto-login ID setting \(NO/YES\)](#).

- ii. The Group Coordinator may change this option on the use of the auto-login ID by following link (shown by the arrow labeled *b.* in the screenshot above).

4. Set the option to not allow “Change Login”, if desired.

- a. Groups have the option to control the ability of group members to change their username and password (in the Subscriber Center, Personal Access page), whether or not auto-login procedures are used.
 - i. New username and password may be selected by a group member via the Subscriber Center, the Personal Access page, and the Edit My Login link.
 - ii. Not allowing the ability to change password (and username if used) is important if login information will be controlled by the institution. Therefore, this option is generally preferred by institutions using auto-login.
- b. The Group Coordinator sets an option to allow/not allow the “Change Login” option to be available to group members via the Group Coordinator Menu page, the Access Options section, and the Manage “Change Login” link (screenshot below).

About ALL | **Libraries** | **Course Catalog** | **Help Center** | **Subscriber Center**

Personal Access

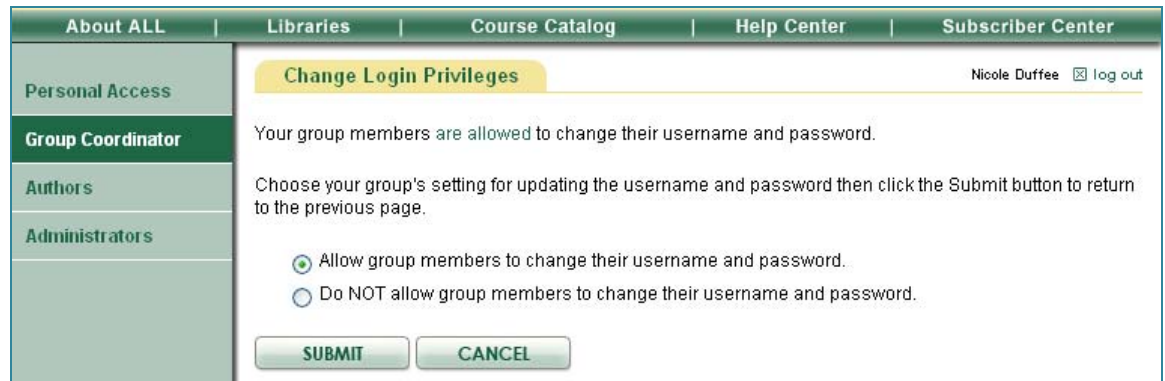
Group Coordinator Menu Nicole Duffee [log out](#)

Group Coordinator Information
[Group Coordinators Guide](#)

Authors Purchases
[Upgrade Accounts](#)
[Data Services](#)
[Order History](#)

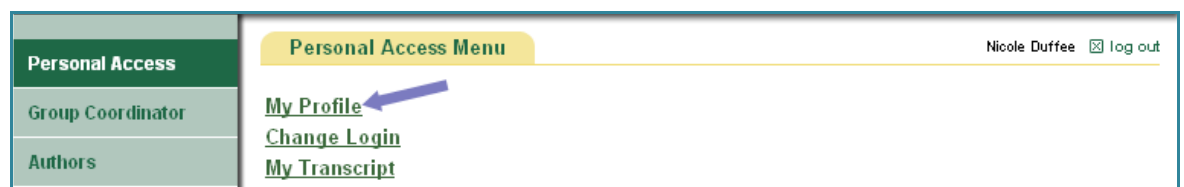
Administrators Access Options
[Manage "Change Login"](#)
[Access Code and Options](#)
[View Wait List Roster](#)

- c. The Change Login Privileges page displays the current setting of “Change Login” and provides the option to change this setting (screenshot below).
 - i. If set to ALLOW, group members may change their username and password.
 - ii. If set to NOT ALLOW, group members are not allowed to change their username and password.



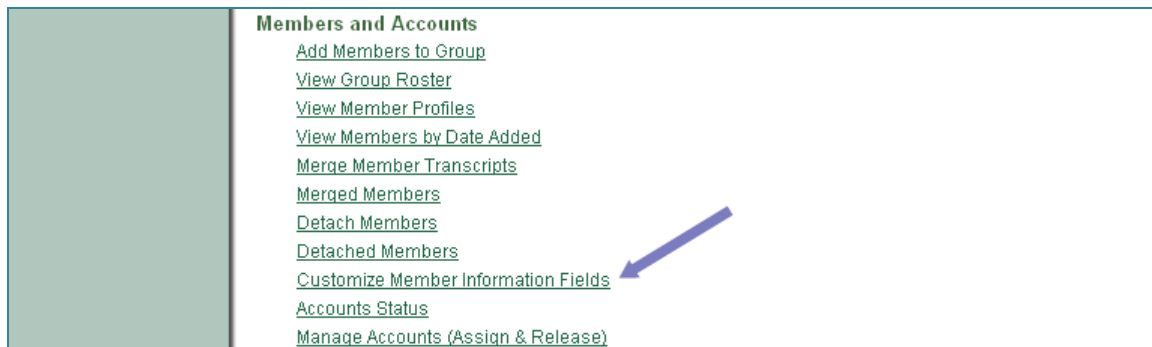
5. Activate and define custom fields, if desired.

- a. The Group Coordinator may specify five additional data fields known as custom fields and which differentiated from the standard contact information fields (such as first name, last name, organization, city, etc.).
 - i. Any group member may view and edit the information in custom fields via the Subscriber Center, the Personal Access page, and the My Profile link (screenshot below, as shown by arrow).



- ii. When custom fields are used for auto-login, a Group Coordinator is advised to work closely with IT staff to coordinate activating custom fields and any other operation related to custom fields.
- iii. Note: The auto-login procedures do not verify whether a custom field has been activated by the Group Coordinator. Data submitted for an inactive custom field will be ignored.

- b. The Group Coordinator sets the use of these custom fields for the group via the Group Coordinator Menu page, the Members and Accounts section, and the Customize Member Information Fields link (screenshot below).



- i. The Group Coordinator has the option to activate or clear a field (screenshot below).
1. The option ACTIVATE causes the custom field data to be used and its data displayed (arrow labeled *a.*).
 2. The option CLEAR causes the custom field to be inactivated (not used or displayed) and the stored data to be deleted (arrow labeled *b.*).
- ii. The Group Coordinator assigns a field description, e.g., “Campus”, to a custom field (screenshot below, arrow labeled *c.*). The field description may be changed at any time.

You may collect additional information using the five custom information fields shown below. Active fields are listed on the contact information page and must be completed by your members. Active fields may be included in Group Transcript Reports.

- Click the [Activate](#) link to begin using the custom field. You will be prompted to enter a description (a column label) for the field.
- Click the [Clear](#) link to inactivate a field. The field description and all member data associated with this field will be deleted.
- Click the [Description](#) of an active field to rename the field. Member data *will not* be deleted.
- Click the [Order](#) link to change the order in which the fields appear on the Member Profile page.

Order	Description	Type	Options	Status	Clear - Activate
1	Research Area	list box	Cats Dogs Mice	Active	Clear
2	Campus	text box		Active	Clear
0	customfield3			Inactive	Activate
0	customfield4			Inactive	Activate
0	customfield5			Inactive	Activate

iii. Using the Order link on the Custom Information Fields page (screenshot above, arrow labeled *d.*), the Group Coordinator sets the sequence in which the custom fields are displayed on the My Profile page of the Subscriber Center.

1. The custom fields are placed below standard fields in the My Profile page viewed by group members (screenshot below, as shown by arrows).
2. Note that an Edit Profile link is available to the group member to change information in any standard or custom field.

Personal Access
Group Coordinator
Authors

My Profile Nicole Duffee [log out](#)

Membership: Institutional/Commercial Group - AALAS Member
Name: Dr. Nicole Duffee
Credentials:
Title/Position: Director
Company: AALAS
Department/Division: Education & Scientific Affairs
Address: 9190 Crestwyn Hills Dr.
Memphis, TENNESSEE 38125
United States
Work Phone: 901-754-8620
Work FAX:
Home Email: nicole.duffee@aalas.org
ALL Listserv Subscription: No
Research Area: Cats
Campus: campus
[Edit Profile](#)

iv. The Custom Field Order page displays the activated fields and allows the column sequence to be changed (screenshot below) in the My Profile page.

1. Enter an order number (1-5) corresponding with the sequence of each custom field activated, starting with the number 1 (leftmost in the custom field series).
2. Take care to enter only one instance of each number, i.e., only one “1”, only one “2”, etc.

Order	Field Name
2	Research Area
1	Campus

6. Select the data fields to be included in downloaded transcript reports.
- a. The Group Coordinator selects data fields to be included in the downloaded transcript report, whether retrieved manually or automatically. The data fields downloaded are managed via the Group Coordinator Menu page, the Group Transcript Reports section, and the Information Included in Reports link (screenshot below). The categories of available data fields to be selected are:
 - i. Contact data fields
 - ii. Custom data fields
 - iii. Course and exam data fields



- b. The Report Fields page (screenshot below) displays the data fields that are included in the downloaded transcript report.
 - i. This page displays the following information:
 1. Column Order: The order (1 to n) for the sequence (left to right) of data fields in columns of the downloaded spreadsheet.
 2. Column Name: The default column label assigned by AALAS.
 3. Field Description: The column label which may be assigned by the Group Coordinator.
 4. Custom Field: The status (YES/NO) whether a data field is a custom field. (In the screenshot below, the arrow labeled *a.* points to two custom fields.)

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Report Fields

The following fields are included in reports for *AALAS/large4*.

Column Order	Column Name	Field Description	Custom Field
1	Username	username	No
2	Member ID	member ID number	No
3	Group	group	No
4	Name	full name	No
5	First Name	first name	No
6	Last Name	last name	No
7	Email	email address	No
8	Research Area	Research Area	Yes
9	Campus	Campus	Yes
10	Registration Date	registration date	No
11	Course	name of course	No
12	Date Exam Passed	date exam passed	No
13	Score	learner's score	No
14	Passing score	passing score	No
15	Date Course Completed	date course completed	No
16	Lessons Remaining	lessons remaining	No
17	CEUs Earned	CEUs earned	No
18	Course ID	Course ID	No
20	Auto-login ID	auto-login ID	No

[Select fields included in report](#) ← b.
[Update column order](#) ← c.
[Change column names](#) ← d.

ii. The Report Fields page (screenshot above) has the following links to support the collection of data in a format which can be integrated with institutional spreadsheets and databases:

1. Select fields included in report (arrow labeled *b.*): The Group Coordinator may select/deselect any data field for contact information, custom information (custom fields), training data, and auto-login ID. Only selected fields will be provided in the downloaded transcript report.
2. Update column order (arrow labeled *c.*): The Group Coordinator can change the order for columns of data fields in downloaded transcript report (1 to n for left to right). Take care to enter only one incident of each number in proper numerical sequence, i.e., only one “1”, only one “2”, etc.

3. Change column names (arrow labeled *d.*): The Group Coordinator can add field descriptions which will be used as the column name in a spreadsheet of a downloaded transcript report.

IF NO ACCOUNTS ARE AVAILABLE FOR NEW ENROLLEES VIA AUTO-LOGIN

1. If a group member enters the AALAS Learning Library via auto-login but there are no accounts remaining for the group, this member will not receive an account. Without an account, members have a restricted use of the system until an account is provided.
 - a. Access to courses is restricted to free courses only (excludes other AALAS courses and custom courses).
 - b. The member may view and change his/her personal profile.
 - c. The member may view his/her existing transcript.
 - d. New training activity in free courses (completed without an account) is not updated in the transcript documentation until an account is assigned.
2. In auto-logins of the types *Self Enroll* and *Returning*, a notification email is sent to the member by the AALAS Learning Library with information that an account is not available on the ALL, a list of the access restrictions, a recommendation to contact the Group Coordinator for an account, and the contact information of the Group Coordinator.

Dear [FirstName] [LastName],

You have enrolled in the AALAS Learning Library (ALL) but there are no accounts available for you in your group. Therefore, when logged into the ALL, your access will be limited to free courses and exams, and your training activity will not be documented in a transcript.

In order to receive an account and have full access to the ALL, please contact your group's coordinator, who is [GC FirstName] [GC LastName] at [GC email]. An email has been sent to this individual also as notification of your need for an account.

Thank you.

AALAS

3. When an account is not available for any type of auto-login (*Self Enroll*, *Returning*, *Administrative Enroll*) an email is sent to the Group Coordinator with information on the event:
 - a. firstname
 - b. lastname
 - c. email
 - d. type of event (*Self Enroll*; *Returning*; *Administrative Enroll*)
 - e. instructions for obtaining more accounts