



ALMA TRAINING GUIDE

AREA: USER MANAGEMENT

Making Changes to user accounts in Alma

DRAFT

VERSION 1.0

LAST UPDATED 20/11/2017

Page | 1

Making Changes to user accounts in Alma (new UI - see over for old UI).

When users register for an OpenAthens account an account is automatically created in Alma unless either the OpenAthens username or email address is already associated with an account.

When making updates to users' accounts, to keep the data in both places accurate, staff are asked to make most alterations in Alma. An overnight process will transmit relevant changes to OpenAthens.

What data on users is held on both systems?

Field on ALMA	Changes match on OpenAthens to:
First name*	First name*
Last name*	Last name*
Preferred Email Address*	Email Address*
Preferred address*	Postal Address
Preferred Phone Number	Phone Number
Campus*	Parent Organisation*
Expiration date*	Expires On*
Notes	Notes

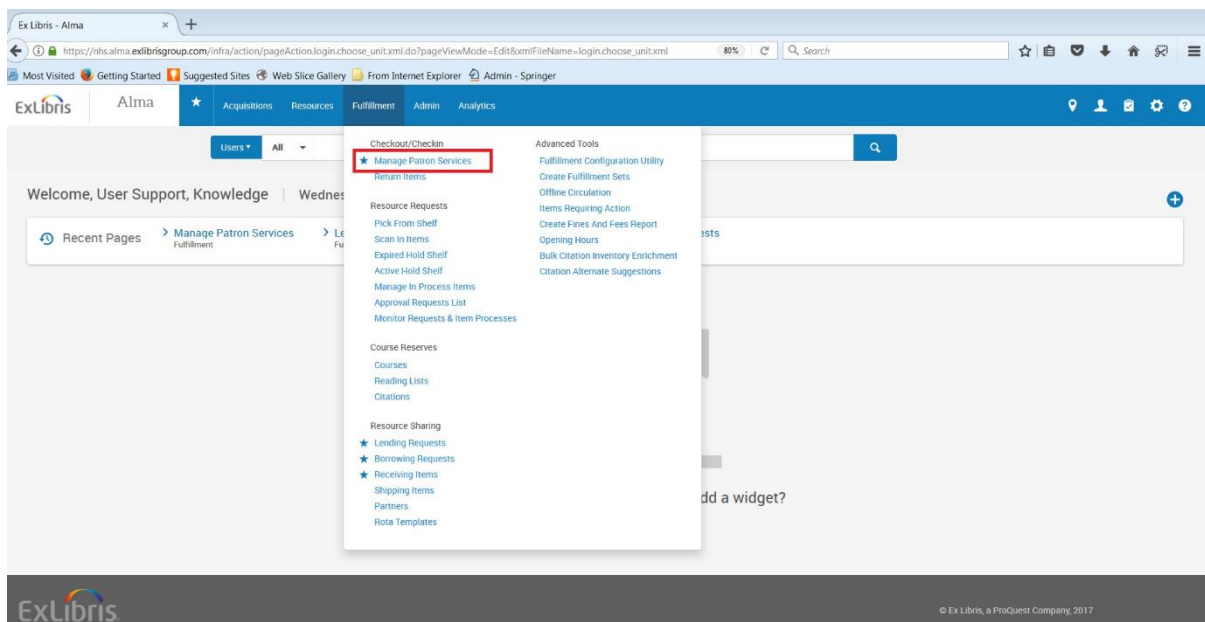
* Indicates a mandatory field

Please Note : Users' passwords are **NOT** held on Alma and no password should be recorded on Alma.

Please also note: changes cannot be made from Alma to accounts that have already expired at OpenAthens; renew the account at OpenAthens and then amendments can be made in Alma.

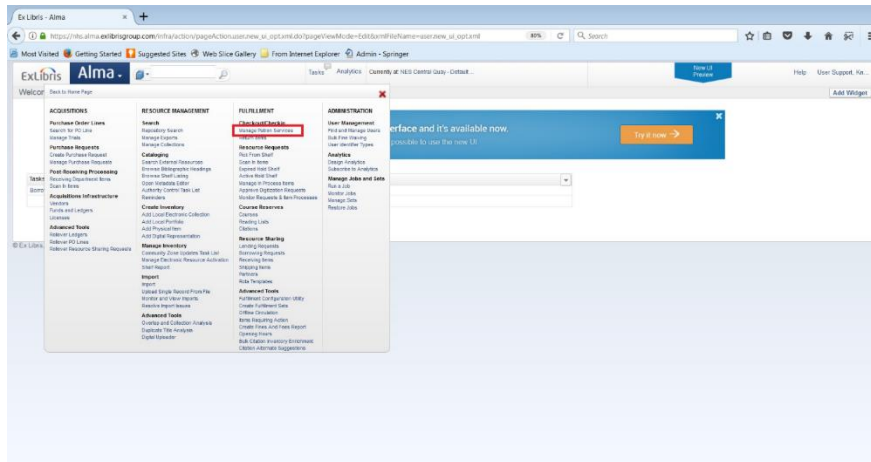
Finding user accounts in Alma :

To search for a user's account select the Manage Patron Services option underneath checkout/checkin in the Fulfilment drop down menu .



Making Changes to user accounts in Alma (old UI).

Finding user accounts in Alma :

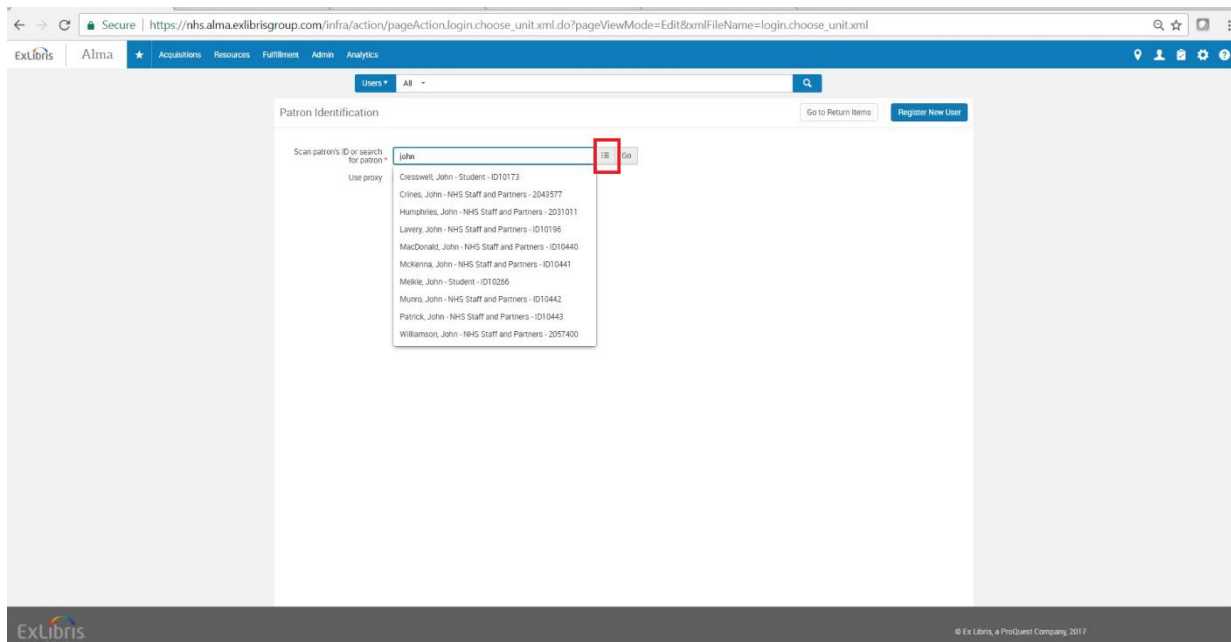


Search for a user by name, OpenAthens username or barcode.

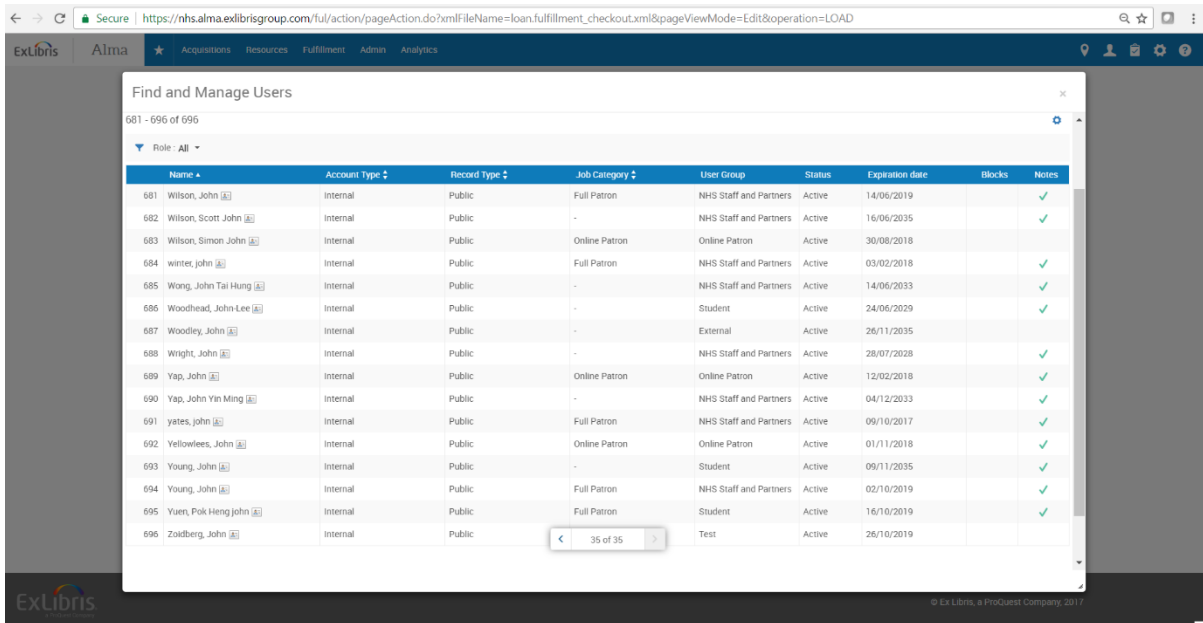
(New UI)

From here you can search for a user by name, OpenAthens username or barcode.

If searching by name you may have to select from a drop down list. To see all the names that match what you are searching for select the “select from a list” button. As below.

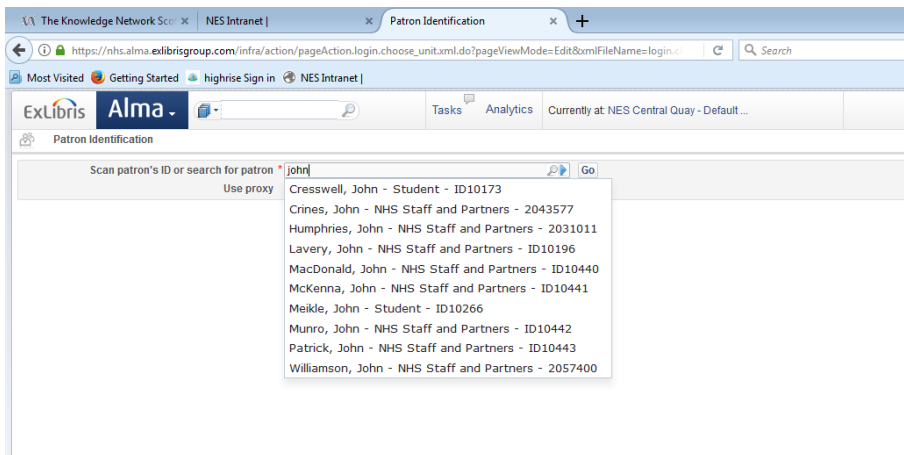


This will produce a list of all the accounts that match your search.



When you select the account you are interested in, you will be taken you back to the search page with the search box auto filled with the account holder's name. From there click on the GO button (old UI)

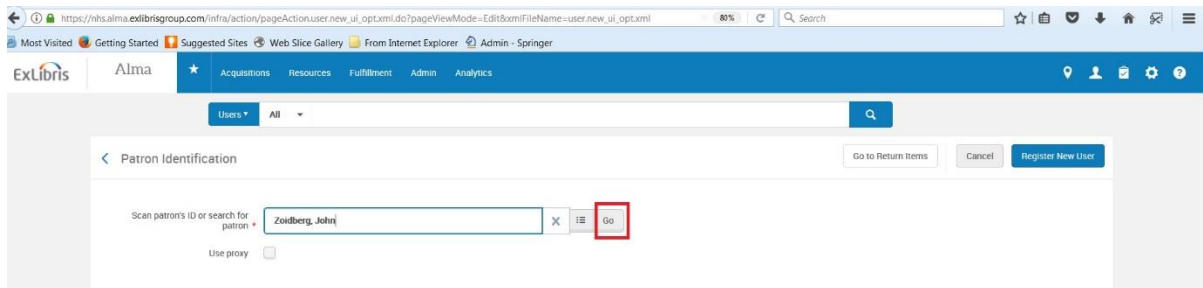
If searching by name you may have to select from a drop down list



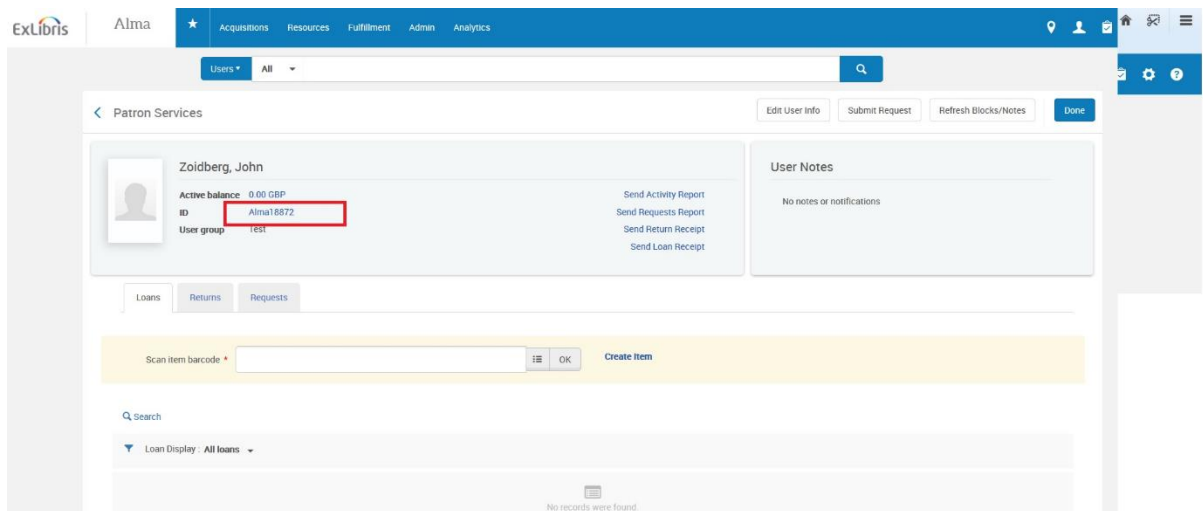
To see all the names that match what you are searching for select the spyglass in the search box.

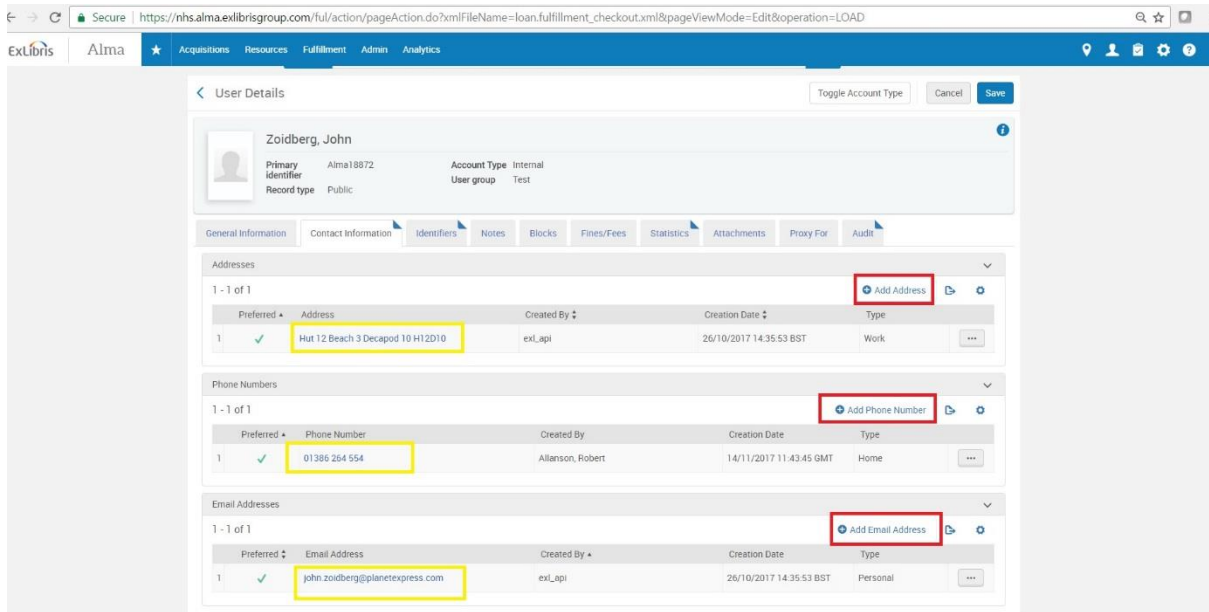
Item #	Name	Account Type	Record Type	Job Category	User Group	Status	Expiration date	Blocks	Notes
1	Abraham, John	Internal	Public	-	NHS Staff and Partners	Active	03/03/2034		✓
2	Adamson, John Leslie	Internal	Public	Online Patron	Online Patron	Active	30/04/2018		✓
3	Addison, John	Internal	Public	-	NHS Staff and Partners	Active	19/09/2034		✓
4	Ahukannah, John	Internal	Public	-	NHS Staff and Partners	Active	25/02/2035		✓
5	Arlie, John	Internal	Public	Full Patron	NHS Staff and Partners	Active	01/10/2018		✓
6	Alexander, John	Internal	Public	Full Patron	NHS Staff and Partners	Active	27/06/2018		✓
7	Allan, John	Internal	Public	-	NHS Staff and Partners	Active	06/08/2028		✓
8	Allan, John	Internal	Public	Full Patron	NHS Staff and Partners	Active	02/11/2017		✓
9	Alton, John David	Internal	Public	-	NHS Staff and Partners	Active	17/03/2035		✓
10	Alvarez, John	Internal	Public	Online Patron	Online Patron	Active	25/09/2019		✓
11	Amoore, John	Internal	Public	-	NHS Staff and Partners	Active	17/09/2030		✓
12	Anderson, John	Internal	Public	-	NHS Staff and Partners	Active	12/04/2030		✓
13	Anderson, John	Internal	Public	Full Patron	NHS Staff and Partners	Active	31/03/2019		✓

(new UI)



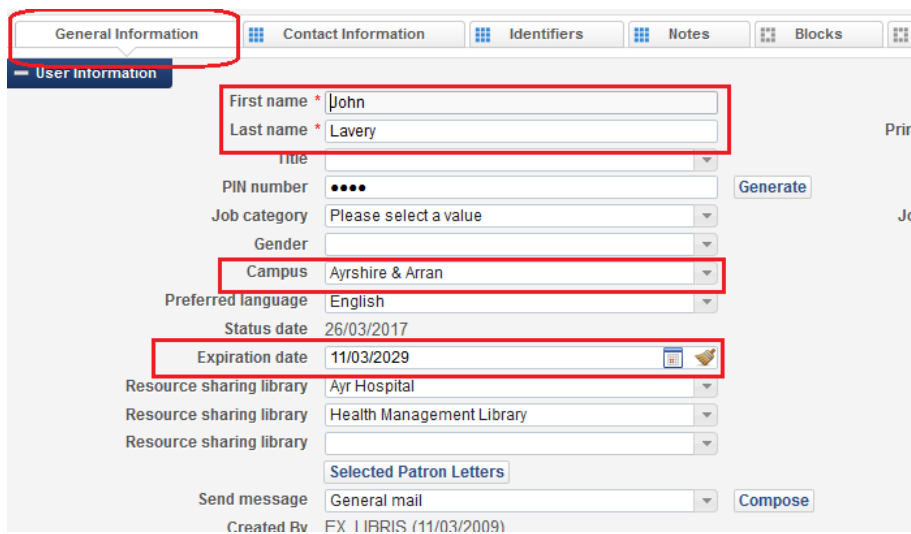
On the initial page click on the ID to be taken to the user's record.





Please note: only contact information marked as the **preferred** entry will be carried over to OpenAthens.

(old UI)



Please note: the expiration date must be less than 5 years in the future, and the account must not have already expired, or no changes will be made on OpenAthens.

Addresses		
Add Address		
Preferred	Address	Created By
1	60 Mill Street Ayr	EX_LIBRIS
2	Rec. Therapy Ailsa Hospital	EX_LIBRIS

Phone Numbers		
Add Phone Number		
Preferred	Phone Number	Created By
1	01292 282844	EX_LIBRIS
2	01292 513063	EX_LIBRIS

Email Addresses		
Add Email Address		
Preferred	Email Address	Created By
1	john.lavery@AAPCT.scot.nhs.uk	EX_LIBRIS

Use the 'Actions' button to edit any entry to change which is the preferred contact information

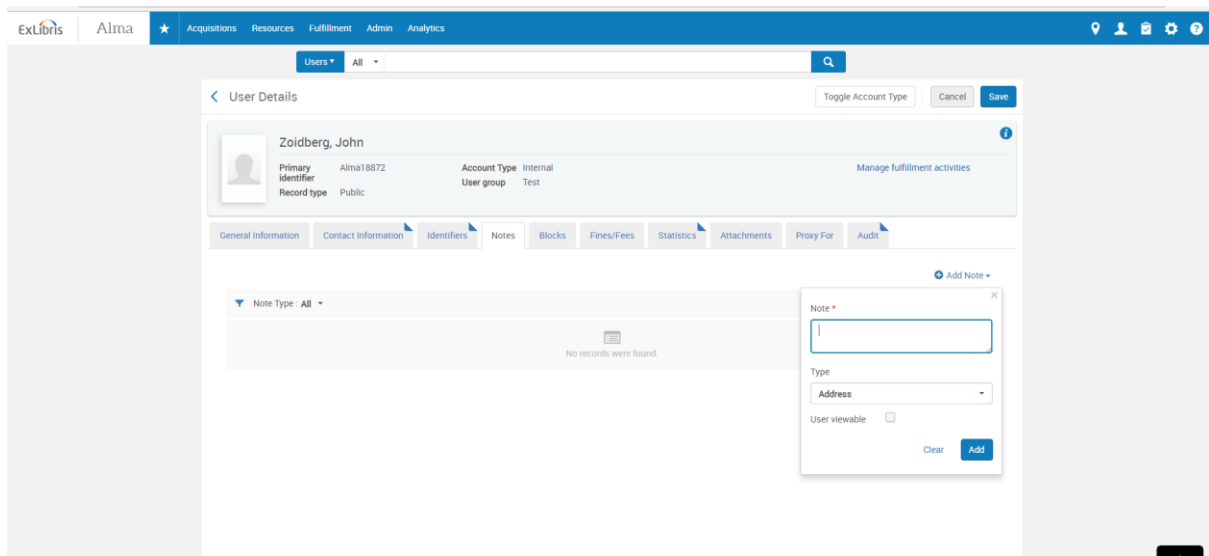
Phone Numbers					
Add Phone Number					
Preferred	Phone Number	Created By	Creation Date	Type	Actions
1	01224 310081	EX_LIBRIS	26/03/2017 08:13:16 BST	Home	Edit Delete Duplicate

(new UI)

The screenshot shows the 'Add Address' modal form in the ExLibris Alma system. The form is overlaid on the 'User Details' page for a user named Zoidberg. The modal contains the following fields and options:

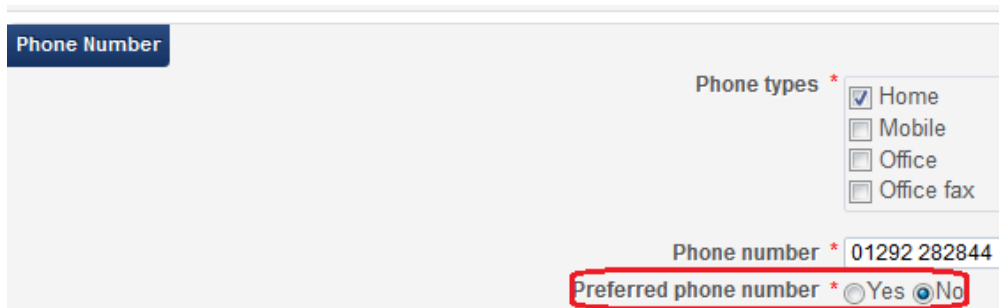
- Address types:** A group of checkboxes for Alternative, Home, School, and Work.
- Address lines:** Five text input fields for Address line 1 through Address line 5.
- City:** A text input field containing 'Washington'.
- Postal code:** A text input field containing 'TWH 16PA'.
- Country:** A dropdown menu.
- Note:** A text area for additional information.
- Start date:** A date picker set to '15/11/2017'.
- End date:** A date picker.
- Preferred address:** A radio button group with 'Yes' selected and 'No' unselected.
- Buttons:** 'Add', 'Close', and 'Add and Close' buttons.

Notes can be added the account under the Notes tab

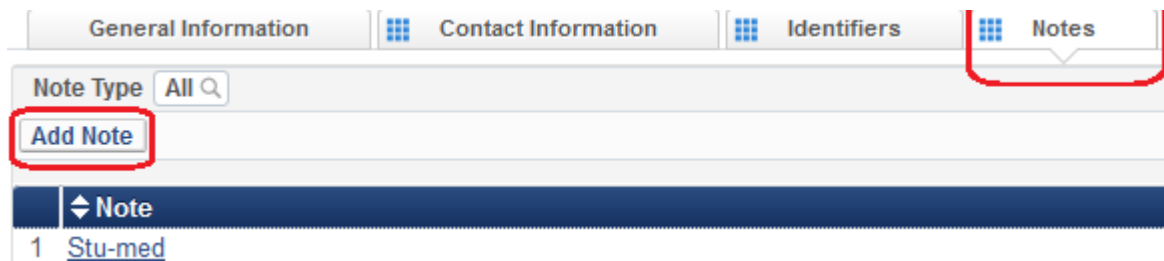


Please Note : Notes will only be carried over to OpenAthens if they begin with “Athens note:” and will then be added to what is already there. Notes on OpenAthens can be no longer than 200 characters, so check if there is already a note there before trying to add more.

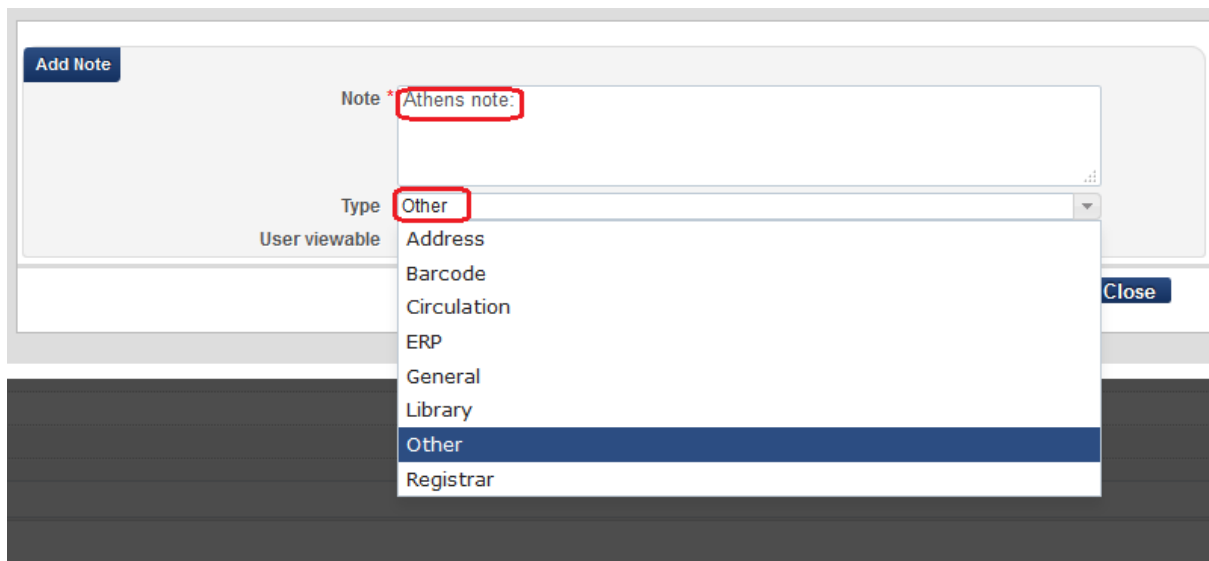
(old UI)



To add a note, click on the Notes tab and 'add note'



If the note is to appear on OpenAthens, it must begin 'Athens note:'. Select 'other' as the type of note:



The screenshot shows a web form titled "Add Note". It has a "Note" text input field containing "Athens note:" and a "Type" dropdown menu. The dropdown menu is open, showing options: Address, Barcode, Circulation, ERP, General, Library, Other (highlighted in blue), and Registrar. A "Close" button is visible on the right side of the form.

Please Note : Notes will only be carried over to OpenAthens if they begin with "Athens note:" and will then be added to what is already there. Notes on OpenAthens can be no longer than 200 characters, so check if there is already a note there before trying to add more.