

Alma Essentials – User Management

User Management Workflows

In this session, we'll take a look at the following common User Management workflows found in the Alma Admin menu: Purge User Records, Bulk Fine Waiving, and Merge Users.

Let's begin with **Purge User Records**. From here you can run a job to delete users in bulk once their purge date has passed. We can see previous runs of this job here. Click Add Job, and enter the job parameters. You can enter a grace period in days, on top of the user's purge date, during which to spare the record's deletion. You can limit the purge to a specific user record type, and to a specific user group. Purging user records waives their fines and fees. If you'd like to avoid purging users who owe above a certain amount (in local currency), enter that amount here. Click Add and Close. Confirm the warning. The purging job is pending and will run soon. Once the job is complete, you can view the job report to see how many records were purged. Note that users without a purge date will not be purged by this job. Your Alma Administrator can configure what happens with deleted user data .

Next let's look at **Bulk Fine Waiving**. This job allows you to waive the fines for many users according to criteria you define. You must enter a Maximum fine threshold to waive, meaning that for users with total fines higher than this amount, the job won't waive their fines. You can exclude waiving fines for users with outstanding overdue loans. You can limit the fine waiving to a specific User Group. You can limit the fine waiving to a specific fine type, such as Library Card Replacement. Your institution can customize the different fine types. You must specify a waiving reason. The options here are customizable as well. Click Run bulk fine waiving. Confirm the warning. The waiving job is pending and will run soon. When the job completes, you can view its report to see how many fines were waived successfully.

Next workflow. If you need to Merge duplicate user records; for example, if two records were accidentally created for the same patron, you can do so under **Merge Users**. To enable this feature contact Ex Libris customer support. Click Add Job. For the From User field, select the duplicate user record. This user can only have the role of Patron for the merge to work. For the To User field, select the original record, that is, the user record you want to keep after the merge, into which the information from the duplicate record will be placed. If you're merging an internal record into an external one, you need to specify whether to copy all segments as internal. This means you'll be able to edit them in Alma later. Select the user segments to be copied, such as Notes, Attachments, and User Roles; or Select All. In addition to these segments, all fulfillment activities such as loans, requests, fines and fees will be consolidated from both records. Click Merge. Confirm the warning. The Merge Users job is now pending and will finish soon. When it is done, select row-options Events, and you can see that the duplicate record has been deleted.

Thanks for joining!