

Creating and Updating User Records

Hello, in this session you will learn about users in Alma, as well as different ways of creating and updating user records.

To see the list of user accounts in Alma, click Admin, then Manage Users.

There are two basic user account types in Alma: Internal and External. Every user record is either one or the other.

Internal users are users that exist only in Alma. they are created manually by library staff, and fully managed by the library.

External users are created, stored and managed outside of Alma. In the student information system, for example, these users' information is loaded into Alma and synchronized on a regular basis. Most of your users in Alma will be managed externally.

You can add and delete internal users from within Alma and modify any field in the user's record.

You can do the same for external users, but changes will be overwritten at the next sync. Instead, changes are usually entered in the external system and then synchronized with the records in Alma.

Once a user logs in, the system will perform authentication. This happens in Alma for internal users, and outside of Alma – via LDAP for example, for external users.

Next the system will perform authorization, and this is why it's important to maintain external records in Alma.

Alma authorizes the user with the right privileges according to the roles that have been assigned to that user. This all occurs in Alma, therefore it requires a user record in Alma.

The authentication process will not be set up when you receive your Alma environment with the test load of the data. Ex Libris recommends that you convert your testing team's group of migrated user records to internal. This will allow them to login to Alma immediately and start working

Alma provides you with several ways to create and maintain external users.

The primary method is user integration. You can create a new profile by going into the Alma configuration menu, selecting General, and clicking on Integration profiles.

This allows you to import the users and manage their accounts.

Let's look at the Student Information System Profile. Under the Actions tab you can see which modes are configured. We will focus on the main options – Import, Synchronize and Online Import.

The Import mode creates new records based off a file that has been exported from your Student Information System. The file was edited to comply with the expected Alma file structure as described in the Developer Network. This file can contain thousands of records, and multiple files can be used in a single job.

When using Import, Alma does not check for existing duplicate records; therefore, it is recommended to use the import mode only for the initial import of users. At the beginning of a new term for example, when you know that all records in the file are new.

The second mode is the synchronize mode. This mode is used for updating existing records and for creating new users. Once the initial import is done, you can use this mode for the ongoing synchronization of existing Alma users.

The file format for Import and Synchronize is the same, but the Synchronize job requires you to select a match point between your existing records and incoming records to prevent duplication.

Note that in order to import or synchronize your users in batch, you need to define an FTP – file transfer protocol connection.

The FTP is a pre-requisite for integration and for importing files from external systems' like the Student information System.

The third mode in the user integration for importing records is the Online import mode. This mode can import or update a single user record in real time from the User system.

In terms of your workflow, Online Import mode does not replace Synchronize mode, but might be used in conjunction with it.

For example, a student or an employee has just registered with the institution's Student information system. But the User job has not yet run. If you configure the Online Import mode here, the circulation desk staff could trigger immediate import of the user's record into Alma.

You can find detailed instructions on how to configure user integration on the Knowledge Center in our documentation and in the Administration Certification course.

Note that you can also use API web services to update and import users. To read more about the API web services, please consult the Ex Libris Developer Network.

Thank you for joining!