Providing Staff Users Access to Alma after Migration

Welcome to this training session on providing access to Alma to your library staff users after migrating from your legacy ILS. We'll show you how to change users from External to Internal type, and how to assign roles.

When your institution has first migrated to Alma and you receive your test load, it is likely that your staff user accounts will have been migrated as Type: External, meaning they are controlled by an external authentication system, such as your student information system. However, it's also likely that your external authentication system has not yet been configured with Alma. This means your staff will not be able to access Alma. Also, user migration into Alma does not assign the roles your staff will need to perform their work in Alma.

Therefore, one of the first tasks your Alma administration team should do after migration is to temporarily change users from External to Internal, and then assign roles. Let's see how to do this.

First, log in to your Alma environment with the Alma administration account provided to you by Ex Libris staff at the time of your Test load. Then on the Admin menu, select Find and Manage Users. Migrated users will probably have Record Type: Public, even though they are actually staff, so switch to that tab. Browse the table to find the user you want to edit, or you can use the persistent search bar at the top to find the user. Click the user's name.

On the User Details page, if the Account Type is External, you'll need to switch it. Click Toggle Account Type, and on the pop-up, click Confirm. Now the Account Type is Internal. Scroll down the User Details page, and you'll see that there is now a field to add a password. Enter an appropriate password in both fields. Depending on your institution's password policy, you may want the user to create their own password as soon as they log in, by checking this box.

When the user is ready to log in to Alma, they will use the Primary Identifier here, or one of the additional Identifiers on this tab, along with the password you just entered.

Later, when your external authentication system is connected to Alma, you will toggle the Account Type back to External, so that the user can use their institutional authentication credentials. Don't forget to click Save in the upper-right corner.

Now you need to add roles. Scroll down the User Details to the User Roles section. Alma only allows staff users to perform tasks for which they've been assigned permission, and permissions are provided by the appropriate roles. Once you know what roles this staff member needs, add them here. You can learn more about roles in the Recommended Articles section of the Knowledge Center page where you launched this training session. Some roles can have the scope of your entire institution, while others apply only to a specific library or even a particular work area, such as a circulation desk. If your institution uses Profiles, you can add a group of appropriate roles with one click.

Back on the User Details page, click Save in the upper-right corner, and the staff user will be able to log in to Alma and start working with the new test load. And that's how you provide your staff users access to Alma after migration.