**User Management**

**Training Materials**

* **[User Management](https://knowledge.exlibrisgroup.com/Alma/Training/AlmaEssentials/Alma_Essentials_-_English/B_User_Management" \t "_blank)**
* [**Administration Fundamentals**](https://knowledge.exlibrisgroup.com/Alma/Training/AlmaEssentials/Alma_Essentials_-_English/O_Administration_Fundamentals)

**Hands-on Exercises**

**Hands on Instructions:**  
Using your sandbox, **sign in as** **AlmaUser01** and complete the following exercises. For these exercises, you may choose to either use the initial prompt to complete the activity on your own, or if you prefer, follow the step-by-step instructions.

**Exercise 1: Search for a known user**

Search for a known user and find their email address, letters/notices (if any), and checkouts. There are three ways to do this:

1. **Admin > User Management > Manage Users**
   * Scroll through the list and select user by clicking on a name
   * To find their email address, go the Contact Information tab
   * To find letters/notices (if any) and what you can do with them (resend/print), go to the Attachments tab
   * To find Fines/fees info, go to the Fines/Fees tab
   * To find checkouts, returns, etc. click the Manage fulfillment activities link
2. **Search Users in persistent search box**
   * Search for a user of your choice
   * Select user by click on their name
3. **Fulfillment > Checkout/Checkin > Manage Patron Services**
   * Enter/scan patron's primary identifier or search for patron by name or any identifier in their user record
   * User notes and circulation information related to loans, returns, requests are accessible from the Patron Services screen
   * Navigate to the user record by clicking the link in the ID field
   * To find their email address, go the Contact Information tab
   * To find letters/notices (if any) and what you can do with them (resend/print), go to the Attachments tab
   * To find Fines/fees info, go to the Fines/Fees tab

**Exercise 2: Add an external user account**

* **Fulfillment > Checkout/Checkin > Manage Patron Services > Register New User**
* Enter required fields

Manage Patron Services is **only** place to create an external user.

Since this user will have an institutional record mark **Patron has institutional record = Yes** and choose the **Owning System** from the dropdown.

* + Enter the appropriate SIS match point identifier (as determined by the SIS integration) in the **Value** field associated with the Identifier Type. The identifier ensures that the existing Alma record will be merged with the master copy of the patron record from the external system.
  + This workflow creates a record for the user, enabling them to borrow items.
  + The password field disappears because internal users’ passwords are managed by the network.
* When done click **Update User**
* Click on **the hyperlinked ID** and then the General Information tab
* Note that the **Patron** role has automatically been added to the user based on user registration rules

Fields in the user record that are owned by the external system are not able to be edited.

* Click **Open for Update** and review the on-screen notification.
* Acknowledge the message by clicking **Yes** Make a change to the user record
* Click on the **Contact Information** tab.

Additional addresses/emails will not be overwritten if you do not check the box next to **Add as an external**.

* Save any changes to the user record

**Exercise 3: Toggle Account Type**

* Open the account for the external user created in exercise two, click **Toggle Account Type** to change the record from external to internal

Password fields are now visible on the **General Information** tab.

When your test load is delivered in your Alma production environment, your user account will be External. If authentication is not set up, you will need to change your user record from External to Internal and enter a password so you can start using Alma. When authentication is set up, toggle the account type again to change the account from Internal back to External.

**Exercise 4:  Add an internal account for community borrower**

* **Fulfillment > Checkout/Checkin > Manage Patron Services > Register New User**
* Enter required fields
  + The primary ID is configured to be auto-generated. Alma can be configured to enter your routine into this field (User ID Generation) or leave it blank.
* For Internal Users such as community borrowers: enter a password. This is the password that internal patrons will use to log into Discovery.

Passwords are stored in the Ex Libris Identity Service, not in Alma.

The password policy of the Ex Libris Identity Service is based upon the NIST Digital Identity Guidelines which emphasizes length (hard to guess) over complexity (easy to remember). Passwords will need to be at least 8 characters long but can consist of any characters (including passphrases, for example). Note that passwords in the Ex Libris Identity Service do not have an expiry date.

* When done click **Update User**.
* Click on the hyperlinked **ID** to be taken to the User Details screen
* Click on the **General Information** tab.

Note that the **Patron** role has automatically been added to the user based on user registration rules.

**Exercise 5: Add roles to a user record**Try to log into Alma with the internal user account created in exercise three above, you will not succeed as the user only has a **Patron** role, which only allows them to access their Primo account.

* **Add the Cataloger role:**
  + Log into Alma with the **UserAdmin** account on a sandbox environment
  + Add the **Cataloger** role for the same internal user created in exercise three above
  + Log out of the UserAdmin user account.
  + Log into Alma with the internal user account,

You’ll be able to access Alma and see the menus and items related to the cataloger role. However, no library appears in Choose Location because the user has not been assigned any roles related to a circulation desk.

* **Add the Circulation Desk Operator and Requests Operator** roles for the Default Circulation Desk.
  + Log into Alma with the **UserAdmin** account
  + Navigate to **Configuration > Change configuration to Main Library > Fulfillment > Library Management > Circulation Desks >** on the line for the Default\_Circ\_Desk **click the ellipsis and choose Edit > Operators** tab
  + Click **Add Operator** and search for the internal user record and give the user the **Circulation Desk Operator** and **Requests Operator** roles
  + Click **Add Operator**
  + **Save** the changes and sign out of Alma
  + **Log in** with the internal user account and verify that Main Library appears as an available location.
  + See the additional options available under the Fulfillment menu

**Exercise 6: Add role from a role profile**

* **Alma Configuration > User Management> Profiles**
* Review the available profiles
* Click **Add Profile** and create a new profile with a selection of roles
* Open a user record
* On the **General Information** tab click **Add from Profiles** in the User Roles section
* Choose a profile from the list and click **Select** to save your changes
* Note the additional profiles added to the user record

***Extra credit:*** Why can you change the primary address on an internal user's account, but only add an address to an external user's account?