# How to Manage Researchers Who Have Left Your Institution

In Esploro, your institution’s researchers, such as the current faculty of your university, are called affiliated researchers. They can sign in to Esploro and make changes to their public profiles. All other researchers are called non-affiliated researchers. These may be researchers from another institution who have co-authored a publication with an affiliated researcher. Esploro stores non-affiliated researcher records, but those researchers do not have access to your institution’s Esploro.

When a researcher leaves your institution, their status should be changed from “affiliated” to “non-affiliated,” with the added label of “previously affiliated.” This will keep your researcher information accurate.

Suppose it’s the end of a semester, and you have a list of researchers that will be leaving your institution. You can update the status of all those researchers with a bulk action.

First, create a set of the researchers you wish to update. For an explanation of how to create a set, see the Esploro Essentials video “Searching, Creating Sets, and Basic Navigation.” Then, in the Esploro Research Hub, Open Admin, Run a Job. Select Update Set of Researchers. Click Next.

Select the set of researchers. Click Next.

As you can see, there are many options for updating researchers with this job. These parameters can be used individually, or in any combination.

In this case, of researchers leaving your institution, you will select Make Researcher Non-Affiliated, Make Researcher Previously Affiliated, and Close Current Affiliations with Current Date. This last one updates the end date of the researchers’ internal department affiliations. Click Next. Check that the information is correct, and click Submit. These researchers will now be updated to Non Affiliated, Previously affiliated researchers.

By default, the public profile and smart harvesting for these researchers will be deactivated, but this can be changed, as we will demonstrate soon.

For institutions that have Alma, please note that the Alma User will not be affected by this researcher update. If, instead, you use a Purge User Records job for the researchers who are leaving your institution, that will update affiliated researchers to non-affiliated when the Alma User is purged.

Visit the Ex Libris Knowledge Center for more information on how to Purge User Records.

You can easily filter researchers by their affiliation status on the Manage Researchers page. To see all previously affiliated researchers, click on the Non-Affiliated tab. Then, click the box for Previously Affiliated.

If you want to reactivate a public profile, such as for a previously affiliated senior faculty member, you can do so from their researcher details page. Under Researcher Settings, Has an Active Public Profile, switch this from No to Yes. Then Save.

That’s how to manage researchers who have left your institution.