

# Alma Essentials: User Management

## Training Materials

- [User Management](#)
  - [Administration Fundamentals](#)
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## Hands-on Exercises

*Roles needed for these exercises: Circulation Desk Operator (Exercises 1-3), User Administrator (Exercises 4-6)*

Using your sandbox, **sign in as AlmaUser01** (or any account with the **Circulation Desk Operator** role) 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), fines/fees, and checkouts.

There are three ways to do this:

1. **Admin > User Management > Manage Users**
  - a. Scroll through the list and select a user by clicking on their name.
  - b. To find their email address, go to the **Contact Information** tab.
  - c. To find letters/notices (if any), go to the **Attachments** tab.
  - d. To find Fines/Fees information, go to the **Fines/Fees** tab.
  - e. To find loans, returns, and requests, click the **Manage fulfillment activities** link.
2. **Search Users in the persistent search box**
  - a. Search for a user of your choice and select the user by clicking on their name.
  - b. To find their email address, go to the **Contact Information** tab.
  - c. To find letters/notices (if any), go to the **Attachments** tab.
  - d. To find Fines/Fees information, go to the **Fines/Fees** tab.

- e. To find loans, returns, and requests, click the **Manage fulfillment activities** link.
3. **Fulfillment > Checkout/Checkin > Manage Patron Services**
    - a. Enter/scan the patron's primary identifier or search for the patron.
    - b. User notes and circulation information related to loans, returns, and requests are accessible from the **Patron Services** screen.
    - c. Navigate to the user record by clicking the link in the **ID** field.
    - d. To find their email address, go to the **Contact Information** tab.
    - e. To find letters/notices (if any), go to the **Attachments** tab.
    - f. To find Fines/Fees information, go to the **Fines/Fees** tab.

## Exercise #2: Add an external user account

1. **Fulfillment > Checkout/Checkin > Manage Patron Services > Register New User**
  - a. Manage Patron Services is the only place to create an external user.
2. Enter values in the required fields.
3. Under **User Management Information**, mark **Patron has institutional record** as **Yes**, then choose the **Owning system** from the dropdown.
4. 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.
  - a. This workflow creates a record for the user, enabling them to borrow items.
  - b. The password field disappears because external users' passwords are managed by the institution's external system.
5. When done, click **Update User**.
6. Click on the hyperlinked **ID** to be taken to the User Details screen.
7. Click on the **General Information** tab.
8. Note that the Patron role has automatically been added based on user registration rules.
9. Fields in the user record that are owned by the external system are not able to be edited. To enable editing, click **Open for Update** and review the on-screen notification.
  - a. If you select **Yes**, the defined fields will not be updated with changes in future synchronization.
  - b. If you select **No**, you can make edits to these user fields, but those changes may later be overridden by the synchronization job.
10. Click on the **Contact Information** tab.
11. Click **Add Address, Add Phone Number, or Add Email Address**.

- a. Additional contact information will not be overwritten if you do not check the box next to **Add as an external**.
  - b. Enter values in the required fields, then click **Add and Close**.
12. **Save** any changes to the user record.

### Exercise #3: Add an internal account for a community borrower

1. **Fulfillment > Checkout/Checkin > Manage Patron Services > Register New User**
2. Enter values in the required fields.
  - a. 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.
3. For Internal Users such as community borrowers: enter a **Password**. This is the password that internal patrons will use to log into Discovery.
  - a. Passwords are stored in the Ex Libris Identity Service, not in Alma.
  - b. The password policy of the Ex Libris Identity Service is based upon the NIST Digital Identity Guidelines which emphasize 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.
4. When done, click **Update User**.
5. Click on the hyperlinked **ID** to be taken to the User Details screen.
6. Click on the **General Information** tab.
7. Note that the Patron role has automatically been added based on user registration rules.

### Exercise #4: Toggle Account Type

1. Log into Alma with the **UserAdmin** account (or any account with the **User Administrator** role) on a sandbox environment.
2. **Edit** the account for the external user created in exercise two.
3. Click **Toggle Account Type** to change the record from external to internal.
4. Click **Confirm**.
5. Password fields are now visible on the **General Information** tab.
6. Enter a **Password** and **Save** the user record.

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 #5: Add roles to a user record

1. Try to log into Alma with the internal user account created in exercise four. You will not succeed as the user only has a **Patron** role, which only allows them to access their Primo account.
2. Add the **Cataloger** role:
  - a. Log into Alma with the **UserAdmin** account (or any account with the **User Administrator** role) on a sandbox environment.
  - b. Edit the account for the same internal user created in exercise four.
  - c. On the **General Information** tab, click **Add Role**.
  - d. Check the box next to **Cataloger**, then click **Add Role**.
  - e. Ensure the **Status** is set to **Active**, then click **Save Role**.
  - f. **Save** the user record.
3. Log out of the UserAdmin user account, then log into Alma with the internal user account.
  - a. 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.
4. Add the **Circulation Desk Operator** and **Requests Operator** roles for the Default Circulation Desk:
  - a. Log into Alma with the **UserAdmin** account (or any account with the **User Administrator** role) on a sandbox environment.
  - b. Open **Alma Configuration**.
  - c. In the **Configuring** dropdown, choose **Main Library**.
  - d. Navigate to **Fulfillment > Library Management > Circulation Desks**.
  - e. On the line for DEFAULT\_CIRC\_DESK, click the ellipsis (...) and choose **Edit**.
  - f. Click the **Operators** tab and select **Add Operator**.
  - g. Search for the internal user record and check the boxes for **Circulation Desk Operator** and **Requests Operator**.
  - h. Click **Add Operator**, then **Save** the Circulation Desk.
5. Log out of the UserAdmin user account, then log into Alma with the internal user account.
6. Verify that **Main Library** appears as an available location, and that you can see additional options available under the **Fulfillment** menu.

## Exercise #6: Add roles from a role profile

1. Log into Alma with the **UserAdmin** account (or any account with the User Administrator role) on a sandbox environment.
2. Navigate to **Alma Configuration > User Management > Roles and Registration > Profiles**.
3. Review the existing profiles.
4. Click **Add Profile** and create a new profile with a selection of roles:
  - a. Add a **Name**, then click **Save and Continue**.
  - b. Click **Add Role**.
  - c. Check the box next to any role you would like to include in the profile.
  - d. Click **Add Role**.
  - e. In the list of **Profile Roles**, toggle roles to **Active** if necessary.
  - f. Some roles may require a **Scope** or additional **Parameters**. Edit the role and define any required fields, then click **Save Role**.
  - g. When done, **Save** the profile.
5. Return to the Alma homepage and edit a user record.
6. On the **General Information** tab, click **Add from Profiles**.
7. Choose a profile from the list and click **Select** to save your changes.
8. Note the additional roles that have been added to the user record.