

Alma Essentials – User Management

Users in Alma

There are many users in Alma, from library staff, to patrons and faculty. In this session, we'll learn how to find existing users and edit their record, and how to add a new user.

We can see the list of our users under Admin > Find and Manage Users.

There are two user **Account Types** in Alma:

Internal users are created manually by library staff and their details are managed in Alma.

External Users are managed outside of Alma by another system in your institution, such as your Student Information System. These users' information is loaded into Alma and is synchronized on a regular basis. You can edit external user details manually in Alma, but these updates are overridden by the next synchronization with the user information system.

There are three user **Record Types** Alma:

Staff users are Library staff that can perform different functions depending on the roles they are assigned. They are usually internal users.

Public users are library patrons who receive services from the library. They are usually external users.

And **Contact** users contain contact information for external vendors and the like.

Note that these three Record Types are used for categorizing only. They don't determine what the user can do, that is determined by User Roles. For example, a Staff user with the Patron role can get services from the library, like any other patron.

Finally, every user in Alma belongs to a **User Group**, such as Undergraduate Student or Faculty. This group helps determine the services the user receives from the library.

You can search for a user record from anywhere in Alma via the persistent search bar. For the search type select Users. For the search index you can select any of these options, or "All" to search all indices. Enter your search query, and here are your search results.

To **View** or **Edit** a user record, click on the name.

This takes you to the User Details page.

On the right panel, you can see our user's Record Type is Staff, Account Type is Internal, and they belong to the Administrative Staff User Group.

Here in the **General Information** tab you can edit the user information. Mandatory fields are the **First Name**, **Last Name**, and **Primary Identifier**, which is the unique ID of the user.

Here you can assign a **User Group** for the user.

You can assign the user with a **Job Category**, which is another method for categorizing users by the functions they perform in Alma.

You can reset a user's **password** from here.

Down here you can assign the **User Roles** that determine which functions the user can perform in Alma. For example, our user has the User Manager role, which means they too can edit users, as we are doing now.

Additional user information can be edited in the other tabs. For example, in the Contact Information tab we can edit the user's physical address, phone number, and email address.

You can learn more about the different user fields in the Managing Users document in the Ex Libris Knowledge Center.

When done editing a user, click Save.

As mentioned earlier, most users in Alma, particularly library patrons, are External, and created automatically via synchronization with your Student Information system. However, you can also manually create users, which is useful for adding library staff users.

To manually create a user in Alma from here in the Find and Manage Users page, click Add User. Select the user type. In our example, let's make it a staff user.

The User Details page is similar to the one we saw when editing a user. Make sure to enter all mandatory information. Click Save and continue. Now you can edit information in the rest of the tabs, and add user roles for this user.

When done, click Save.

Thanks for joining!