Managing Users

Note

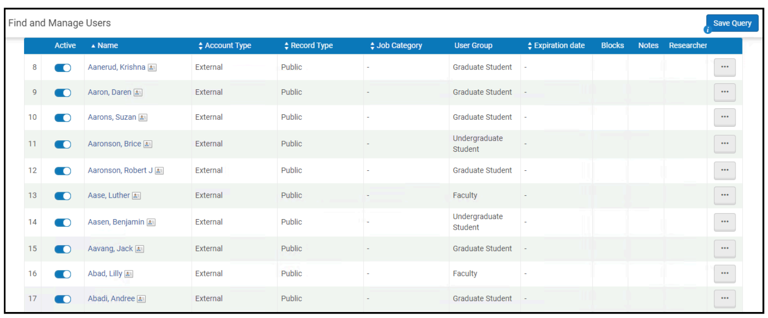
This page describes how to manage users including adding, editing, deleting and distributing users. For information on working with user roles (including user profiles) see Managing User Roles.

To manage users, you must have one of the following roles:

- User Manager
- User Administrator
- Circulation Desk Manager
- Circulation Desk Operator

Users with the Fulfillment Service Operator role can view the user information described below, but cannot edit it.

You manage users on the Find and Manage Users page (**Admin > User Management > Manage Users**). You can also access this page by searching for a user in the persistent search; see Searching in Alma.



Manage Users Page

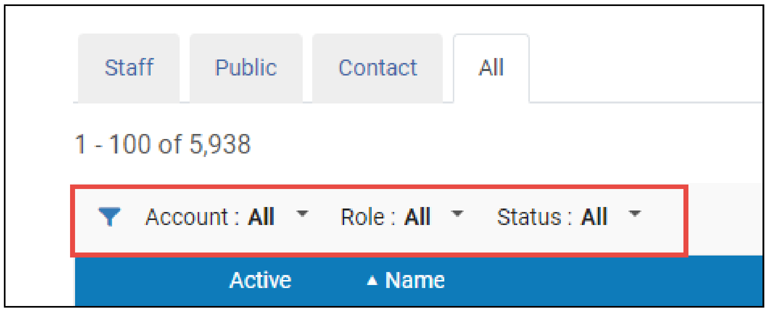
For information on finding and editing existing users and adding new users, watch the Users in Alma video (4:33 min).

Use the tabs (**Staff**, **Public**, **Contact**, and **All**) to filter the user list according to user record type.

Note

- When searching for **Email** or **Identifiers**, you must enter the entire string; a partial match is not performed.
- For additional information on managing users in a collaborative network, see Centrally Managing Users in a Network Zone.

Use **Account**, **Role**, and **Status** filters within a tab to further filter the user list:



Manage Users filters

- **Account** filter - filter the user list to display only; a) **External**, b) **Internal**, c) **Internal with external authentication**, and d) **All** users.
- **Role** filter - filter the user list to display only the users with a specific role, i.e. Catalog Administrator, and so forth.
- **Status** filter - filter the user list to display only users with the following statuses; a) **All**, b) **Active and not expired**, c) **Not active or expired**.

The following columns appear on this page.

Find and Manage Users Page - Column Descriptions

Column Name	Description
Active	New users are activated automatically. • To deactivate user - Drag to the left to toggle off. • To reactivate a deactivated user - Drag to the right to toggle on. **Note** Marking a user as **not active** is equivalent to blocking the patron account. For example: • Users fail authentication if their account is inactive. • Loaning will be blocked.
Name	The name of the user. Select this link to open the User Details page (see Editing Users).
Account Type	• **Internal** – A user managed entirely within Alma. • **External** – Users imported from and managed by an external system. The core user details are managed in the external system but can be viewed in Alma.
Record Type (All tab only)	The type of user. See Adding Users for more information about this field. • Staff • Public • Contact - This type is reserved for vendor contacts.
Job	The user's job category; see Configuring Job Categories.

<table>
<tr><th>Column Name</th><th>Description</th></tr>
<tr><td>Category</td><td></td></tr>
<tr><td>User Group (not in Contact tab)</td><td>The user’s user group; see Configuring User Groups.</td></tr>
<tr><td>Status</td><td>Whether the user is Active or Inactive. For internal users, who are authenticated by Alma, this is a manual setting not tied to the expiration date. For more information about authentication, see Expiration Date below.</td></tr>
<tr><td>Expiration Date</td><td>Alma distinguishes between authentication, which is the act of determining if the user is a legal user, and authorization, which is the act of determining what the user may do in the system:
• This field is related to authentication. Users fail authentication if their account is inactive or is expired.
• If authenticated by the authenticating system, Alma checks for the authorized actions. Authorizations are managed in Alma based on the user's roles. A role, its scope, and its expiration date, determine a user's authorization for any action.
Expiration date may impact the due date of the loan. The due date is shortened to the patron’s expiry date. This can be configured using the extend_due_date_beyond_user_expiry parameter. If a patron is nearing her expiration date, the due date of the loan is automatically set as the expiration date, and cannot be changed manually. See also the knowledge article Is it possible to change an item due date past the user expiration date in Alma?
The User Registration Terms of Use (see Configuring Terms of Use) enable you to configure the User Renewal Period policy and other policies associated with how patrons are registered at the circulation desk. For more information, see Configuring Terms of Use.
After you define the User Registration Terms of Use, assign the Terms of Use for each user group (see Configuring User Registration Rules).
Note
It is not possible to set expiration dates in the past.</td></tr>
<tr><td>Blocks (not in Contact tab)</td><td>Whether there are any blocks on the user.</td></tr>
<tr><td>Notes</td><td>Whether there are any notes about the user.</td></tr>
</table>

You can do the following on the Find and Manage Users page:

- Adding Users
- Editing Users - This action is typically required immediately after adding a new user.
- Deleting Users - Only the User Manager or User Administrator Roles can delete users.
- Distributing Users

Note

Users that have entered their password incorrectly five consecutive times are locked out of Alma and are unlocked automatically after 30 minutes.

Additional user management tasks include:

- Purging Users
- Managing User Roles

Adding Users

You can add new users from any of the tabs on the Find and Manage Users page.

Note

- External users are synchronized with Alma using the User integration profile.
- When creating a patron by selecting **Register New User** on the Manage Patron Services page (see Registering Patrons), it is possible to register external users as well.
- All primary and additional identifiers must be unique for users, including for the same user.
- When adding new users from Find and Manage Users, the Role Assignment Rules are applied (see Configuring Role Assignment Rules).

To add a new user:

Note that Circulation desk managers and operators can only add users by using the **Register New User** option in the Manage Patron Services page (see Registering New Patrons).

1. On the Find and Manage Users page (**Admin > User Management > Manage Users**), select **Add User**.

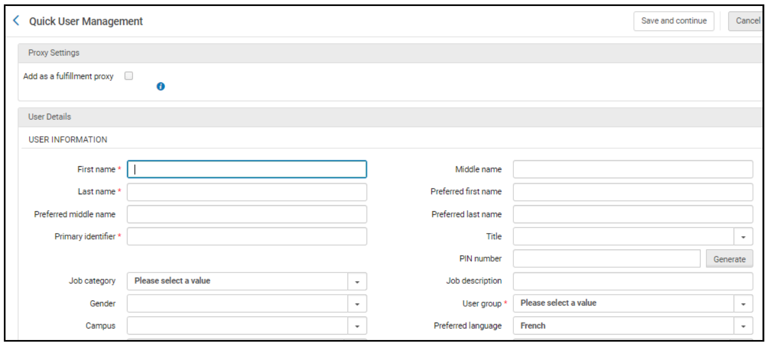
   The Quick User Management page appears.

   - On the **All** tab, you are prompted to select the record type (**Staff**, **Public**, or **Contact**).

     Note

     Contact is reserved for vendor contacts and should not be used.

   - On any other tab, the record type is set according to the tab.



Quick User Management Page

2. Enter the following information. The fields marked as mandatory in the following table are by default; an administrator can configure which fields are mandatory (see Configuring Patron Information).

Note

An **Authorized for resource sharing requesting** checkbox is visible for institutions that use Rapido when new users are created. For more information, see Enabling Self Registration for Net Lenders.

Quick User Management Page Fields

Section	Field	Description
Proxy Settings	Add as Fulfillment Proxy	Selecting this option will create the new user as a fulfillment proxy. All requests by this patron and loans checked out to this patron will be associated with the sponsor user
Not local	Find user in other institution	See Registering Patrons.
User Information To configure how user names appear in Alma, see Configuring the Display of User's Names	First / middle / last name	First and last names are mandatory.
	Preferred first / middle / last names	Preferred names replace the main first/middle/last names in all places that the name appears within Alma, for example, letters, **Manage Patron Services**, and the **Active Hold Shelf**. A search for name finds both the regular and preferred entries. For example, a search for the last name finds both the **Last name** and **Preferred last name** values. They are both indexed under last name. For information about using preferred names in system notifications and letters, see Working with Names in System Notifications and Letters. The preferred name fields are editable by internal users similar to the other name fields. For external users, the preferred name fields are updated by the SIS system and can be manually updated. For more information, see the SIS details provided in the Ex Libris Developer Network.
	Primary identifier (mandatory)	The primary user ID. The ID must be unique within the institution. For details on identifiers, see https://developers.exlibrisgroup.com...ser-management. You may be required to enter a primary identifier in a particular format. See the parameter **primary_identifier_regex** in Configuring Other Settings.

		If you arrived at this page by selecting **Register New User** on the Patron Identification page, this field is pre-filled if you have configured user ID generation; see Configuring User ID Generation. You can change the pre-generated ID.
	Title	A user title. These can be configured by an administrator; see Configuring User Titles.
	PIN number	A four-digit number which serves as a password for the user to log on to the self-check machine (SIP2); see Configuring SIP2 Bin Configuration. Manually enter a number or select **Generate** to generate a PIN number. The PIN number is sent in the PIN Number Generation Letter. **Note** PIN number generation is available only if the **pin_number_method** parameter is enabled and set to **fourDigit**. For information, see Configuring Other Settings.
	Job category	The user's job category. For example, Acquisitions Operator, Cataloger, or Manager. The job categories available depend on the record type selected (above). To configure job categories, see Configuring Job Categories. To associate job categories with record types, see Mapping Job Categories to User Record Types. If the job category is associated with role assignment rules (see Configuring Role Assignment Rules), then the role profiles associated with the job category are added to the user after you select **Save**. In this way, job categories enable you to assign multiple roles to a user at once, so that you do not have to configure roles individually for the user.
	Job description	A free text description of the user's responsibilities.
	Gender **(Obsolete)**	The user's gender.
	User group (not required for Contacts)	The user's user group, such as Faculty, Patron, and so forth. The user groups available depend on the record type selected (above). To configure user groups, see Configuring User Groups. To associate user groups with record types, see Mapping User Groups to User Record Types. If the user group is associated with role assignment rules (see Configuring Role Assignment Rules), then the role profiles associated with the user group are added to the user after you select **Save**. In this way, user groups enable you to assign multiple roles to a user at once, so that you do not have to configure roles individually for the user.
	Campus	The user's campus. See Managing Campuses.
	Website URL	The user's website, if any.
	Preferred language	The language for email correspondences. For email correspondences to be sent in the selected language, the language must be enabled in the Institution Languages Mapping Table. For details, see Configuring Institution Languages.

	Status (edit only)	The user's status, active or inactive.
	Status date (edit only, read-only)	The date of the last status change for the user.
	Birth date	The user's birth date.
	Expiration date	The estimated date when the user is expected to leave the institution. For more information, see Expiration Date.
	Purge date	The date on which the user will be purged. See Purging Users. **Note** It is not possible to set purge dates in the past.
	Last Patron Activity Date	The last date that selected activities were executed. When the feature is enabled, this field is updated when any of the following activities are executed: ◦ Placing a request of any type - hold, booking, digitization, acquisition, resource sharing ◦ Borrowing an item (all workflows, including self-check / API) ◦ Returning an item (all workflows, including self-check / API) ◦ Loan renewal (except automatic renewal), or renewal request (for resource sharing loans) ◦ Update of user information from Primo The following activities do NOT update this field: ◦ Using the **Pay** button on the Manage Patron Services page ◦ Canceling a request in Alma or Primo ◦ Patron Purchase Request sent from Primo Due to privacy concerns, data will only be collected from the feature activation onward. If the option is disabled, all data collected in this field will be deleted for all users. To enable this option, select **yes** in the **Record Last Patron Activity Date** page. Watch the Last Patron Activity Date video (1:36 min).
	Resource sharing library	A resource sharing library responsible for resource sharing requests initiated by this user. Only libraries defined as resource sharing libraries appear in the list. (To configure resource sharing libraries, see Configuring Parameters of a Resource Sharing Library.) You can select one or more resource sharing libraries in this multi-select field. When multiple resource sharing libraries are selected, they appear in the **For library** field on the Primo Get it tab, according to the **ill_item_creation_lib_code** parameter (see Configuring Other Settings). When no value appears in this field, the default library specified in the **ill_item_creation_lib_code** value is used.

		When modifying this field for an existing user, the new value of the field is not overridden during an SIS/User API update.
	Purchase request library	A library responsible for purchase requests initiated by the user. You may select one or more libraries in this multi-select field. When libraries are selected, they appear on the Primo purchasing request form in the Get it tab.
	Cataloger level	The cataloger level. This field appears only if cataloging permissions are enabled for your institution; see Cataloging Privileges.
	Selected Patron Letters	Opt the user into or out of notifications. Select or clear the checkboxes next to each notification that you want to enable or disable for the user. For more information, see Configuring Library Notices Opt In. Research letters appear only if your institution is enabled for Esploro. See Managing Researchers in the Esploro documentation.
	Send social login invitation letter	See Social and Email Login.
User Management Information (not mandatory)	Patron has institutional record (appears only after selecting **Register New User** on the Patron Identification page)	See Registering Patrons.
	Password	A user's password for Alma, Leganto, and/or Primo (see https://developers.exlibrisgroup.com...ser-management). As long as this password is not changed in the Primo account, it remains valid for both Alma and Primo. Any text you enter here is not echoed back to you, so enter the password carefully. Passwords are optional for internal users.
	Verify password	Re-enter the password to ensure that you entered it correctly.
	Force password change on next login	When selected, the user must change their password the next time they log into Alma (relevant for Alma only).
	Enable multi-factor authentication	Add multi-factor authentication for this user. This checkbox only displays if the **mfa_for_alma_hep** parameter is enabled (see User Settings). For more information on MFA see Ex Libris Identity Service.
User Identifier (this section appears if **Identifier 1** is selected as a mandatory field for this record type; see Managing User Identifiers)	Identifier Type (mandatory)	Select the user identifier type.
	Value (mandatory)	The user identifier.
*The following fields that appear on the Quick User Management page when adding a user appear in the **Contact Information** tab when editing a user.*		
Email Addresses	Email types (mandatory)	You must enter an email address. Select an email address type: ◦ Alternative (staff/public only) ◦ Claim (contact only)

		◦ Order (contact only) ◦ Payment (contact only) ◦ Returns (contact only) ◦ Personal ◦ Work ◦ School (public only)
	Email address (mandatory)	The user's email address. You may be required to enter an email address in a particular format. See the parameter **email_regex** in Configuring Other Settings.
Addresses	Address types	Select a mailing address type: ◦ Claim (contact only) ◦ Order (contact only) ◦ Payment (contact only) ◦ Returns (contact only) ◦ Home ◦ Work ◦ Alternative (public only) ◦ School (public only) Enter the address details: ◦ Street address - You may be required to enter a street address in a particular format. See the parameters **address_lineX_regex** in Configuring Other Settings. ◦ City ◦ State/Province ◦ Postal code - You may be required to enter a postal code in a particular format. See the parameters **postal_code_regex** in Configuring Other Settings. ◦ Country
Phone numbers	Phone types	Select a phone number type: ◦ Home ◦ Mobile ◦ Office ◦ Claim fax (contact only) ◦ Claim phone (contact only) ◦ Order fax (contact only) ◦ Payment fax (contact only) ◦ Payment phone (contact only) ◦ Returns fax (contact only) ◦ Returns phone (contact only) ◦ Office fax (staff/public only)
	Phone number	The user's phone number. You may be required to enter a phone number in a particular format. See the parameter **phone_regex** in Configuring Other Settings.

3. Select one of the following options: In either case, continue configuring user details as described in each of the following topics.

Note

If you add a user that has the same first name, last name, and birth date as an existing user, a warning message appears.

   - Select **Save** or **Save and Continue**. The new user is saved and you return to the Find and Manage Users page. Continue with editing the user; see Editing Users.
   - Select **Save and Continue**. The user is saved and you continue with editing the user. See Editing Users.

Editing Users

Edit users immediately after adding them or for any other reason. You edit users on the Find and Manage Users page (**Admin > User Management > Manage Users**).

- For internal users, you can edit all user record fields.
- External users are maintained in an external system, such as SIS (Student Information System). For external users:
  - You can edit only certain fields in the General Information tab of the User Details page.

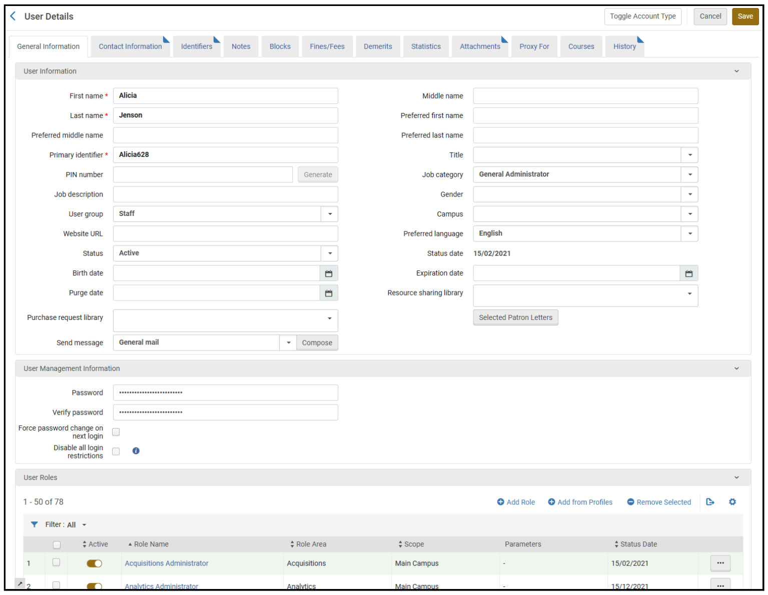
    Changes to the General Information fields that are edited are not overridden by subsequent SIS updates. You can select the **original value** option from the drop down of selectable values if you would like to revert a changed field and re-synchronize it with the value that is managed in the SIS system. This option appears only if the field is manually changed from the value supplied by the SIS feed. Manually changing the field value to the value that is stored in the SIS has the same effect of re-synchronizing the field with future updates from the SIS.
  - You can add contact information in the Contact Information tab, but cannot edit information there.

  To enable editing other fields of external users, or to change an internal user to an external user (and vice versa), see below.
- To edit users in bulk, see Editing/Messaging Users in Bulk.

For an in-depth explanation of internal and external users in Alma, see https://developers.exlibrisgroup.com/alma/integrations/user-management.

To edit user information:

1. On the Find and Manage Users page, select **Edit** in the row actions list or select the user's name. The User Details page appears.



User Details Page

2. If the patron has a social account attached, select **Detach from Social Account** to disassociate the social login from the patron.
3. To distribute the user in a Network Zone, see [Centrally Managing Users in a Network Zone](#).
4. To enable editing other fields of external users, select **Open for Update,** and select **Yes**. Edit the relevant fields and select **Save**. Note that changes you make to most fields will be lost after the next SIS synchronization job. However, Alma prompts you to determine whether the following fields will be overridden with the next SIS synchronization job: **Title, PIN number, Job category, User group, Campus, Preferred language, Resource sharing libraries, Cataloger level, Selected patron letters**. (Note that this determination is kept internal and is not externalized in the user record in any way.)
5. To change an internal user to an external user (and vice versa), select **Toggle Account Type**.

Note

When toggling an account from internal to external, the owner is set to **SIS_temp**. This is a code that is used to mark the next user synchronization job to update the record.

Only users with the **User Manager** or **User Administrator** roles can toggle accounts.

---

6. Edit the required information in the **General Information** tab. For information about most of the fields on this page, see [Adding Users](#).
    - **Website URL** - The user's website.
    - **Status** - Whether the user is **Active** or **Inactive**.
    - **Status date** - The date on which the user was registered or the date of the user's last status change.
    - **Send Message** - Select the type of message you'd like to send.

    Note

    Operators with **Can't edit restricted users** configured are not able to send an Email to a user account defined as **restricted for editing**. For more information, see [Restricting Users for Editing](#).

The options you can choose from are (any other options, such as an identity provider option, are for future use):

- **General mail** - This sends a general message. Select **Compose** to open the E-mail Message pop-up window, where you can write an email to send to the user with any questions, issues, or notifications. Fill in the fields and select **Send E-Mail** to send the message. (For more information on the letters, see [Configuring Alma Letters](). To configure the default **From:** address of this email, see the parameters **disable_from_address** and **from_address** in [Configuring Other Settings](). To send emails to users in bulk see [Editing/Messaging Users in Bulk]().)

  Note

  The **General mail** letter does not appear in **General > Letters > Letters Configuration**, with no additional configuration changes options.

  The letter **ILL Email to User** needs to be activated for the General mail function to work. This letter is not customizable.

- **Patron personal information mail** - This sends an email with an attached file containing the complete XML record of the data stored about the patron in their user accounts, including attachments. The message is sent to the patron's preferred email. The email letter itself is the Personal Information Letter.

  Note

  In order to send a Personal Information Letter to a patron, the parameter **Send Patron Information Letter** must be enabled under Circulation Desk roles'. The parameter **Send Patron Information Letter** is activated for users with a Circulation Desk role by default. If it is not activated or you wish to deactivate it, open a ticket with [Ex Libris support]().

- **Social Login Mail** - This sends a letter containing information to activate login to Primo/Alma with a social network. This option appears if an integration profile is defined for a social network. The letter used is the Social Login Invite Letter. For more information on this integration profile, see [Configuring Integration Profiles]().

◦ **Created By** - The staff user or process (e.g. SIS job, APIs) that created this user.

◦ **Updated By** - The staff user or process (e.g. SIS job, APIs) that last updated this user.

◦ **Disable all login restrictions** - Select to disable login restrictions by IP range. This checkbox may be automatically unchecked and read-only, depending on the options selected on the Login Restriction Configuration page. For more information, see [Restricting Alma Logins by IP Range]().

◦ **Allow Ex Libris Simulated Login** - Give permission to Ex Libris to simulate login for this user. This checkbox only appears when the **allow_exl_to_login_as_staff_users** option is enabled (see [Configuring Other Settings for User Management]()).

◦ **User Roles** - See [Adding Roles to Users]()

Note

The **Created By** and **Updated By** fields have been moved to an information box that is accessed by selecting the

---

icon on the top right corner of the page. The information box also includes **Created Date**, **Last Updated Date**, and **Last Updated by Job.**

The Last Updated Date is updated when making a change to the user's details in the General Information tab, and also when adding a note in the user's Notes tab or a block in the Blocks tab

---

The following additional fields/options appear when editing a user.

7. Edit the information in the following tabs:
   - **Contact Information** – See Managing User Contact Information.
   - **Identifiers** (not available for Contact users) – See Managing User Identifiers.
   - **Notes** – See Managing User Notes.
   - **Blocks** (not available for Contact users) – See Blocking and Unblocking Users.
   - **Fines/Fees** (available only for users with the **Patron** role) – See Managing User Fines and Fees.
   - **Statistics** – See Managing User Statistics.
   - **Attachments** – See Managing User Attachments.
   - **Proxy For** – See Managing Proxy Users
   - **History** - See Viewing Changes to the User Record.
8. If the user has the **Patron** role, select **Manage Fulfillment Activities** to access the Patron Services page. Actions like loan, return, or pay a fine are not available when ***viewing*** Manage Fulfillment Activities via **User Management**. For details on patron services, see Managing Patron Services. Select **Back** to close the Patron Services page and return to the User Details page.
9. To edit the user picture, see Managing User Pictures.
10. If you made changes in the **General Information** tab, selecting **Save** is required to have the changes saved. You are then returned to the **Find and Manage Users** page.
    Changes made to other tabs in the **User Details** screen are automatically saved in Alma.

Note

- Changes made to other tabs
- The **Identifiers** and **Blocks** tabs are not available for Contact users.
- The **Fines/Fees** tab is available only if the user has been assigned the **Patron** role (see Managing User Roles).
- Demerits information appears only when enabled by Ex Libris and only for the following roles: Circulation Desk Operator, Circulation Desk Operator - Limited, Circulation Desk Manager, Fulfillment Services Operator, Fulfillment Services Manager, Fulfillment Administrator. To enable demerits information, contact Ex Libris Support. For more information on demerits, see Configuring Demerits.

Managing User Contact Information

You can manage user contact information, including addresses, phone numbers, and email addresses, on the Contact tab of the **User Details** page. Addresses are used when receiving material (such as from a resource sharing request). For Contact record types, at least one phone number must be added. Phone numbers marked as **Preferred SMS** receive SMS notifications. For Staff and Public users, at least one email address must be added. Email addresses are used for receiving Alma letters (see Configuring Alma Letters).

Alma can send emails to multiple recipients simultaneously - for example, emails addressed to under-aged patrons can also be sent to their legal guardians. To enable this, Alma supports a "CC address" email type for public and staff type users only. When an email is sent to the patron, it is sent to all of the CC addresses, in addition to the address that is marked as **Preferred.** Note that you can indicate an email address as both a CC address and a different type of address (Alternative, Personal or Work). However, other types of email address do not have any functional implication, thus indicating them as such is for information only.

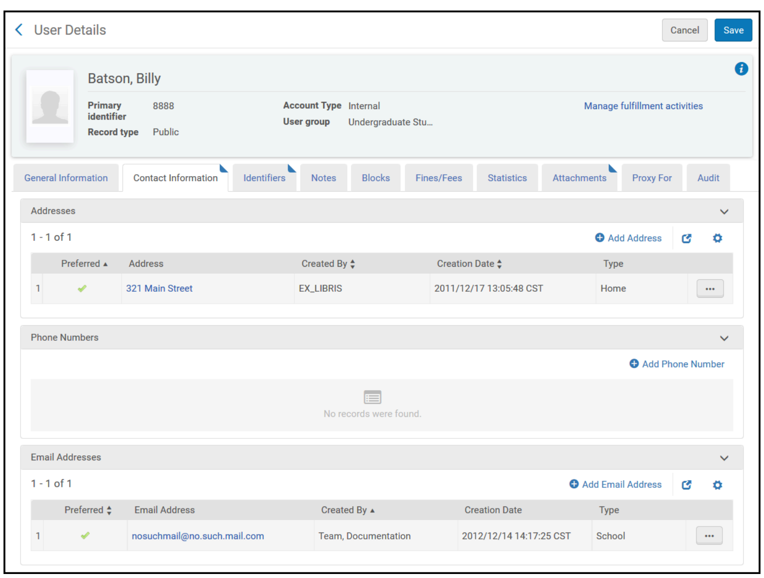
Note

- Users can also be configured to receive email notifications that are sent after a scheduled job runs. You can configure notifications to be sent to Alma users and/or to manually entered email addresses. For information, see Configuring Email Notifications for Scheduled Jobs.

When patrons update their address through Primo My Account, the change applies only to internal and preferred addresses:

- If the preferred address is external, the system will create a new internal address and set it as the preferred one.
- If the preferred address is already internal, that address will simply be updated

If you have multiples of one type of contact information, you can designate one of them as **Preferred**, which makes it the default. In some cases, Alma uses the default contact automatically. You must set one email address to **Preferred** in order for the user to receive letters from Alma. On some pages, you can select a non-default contact.



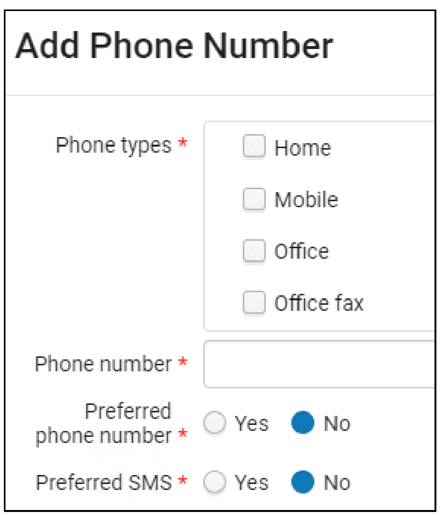
User Details Page — Contact Information Tab

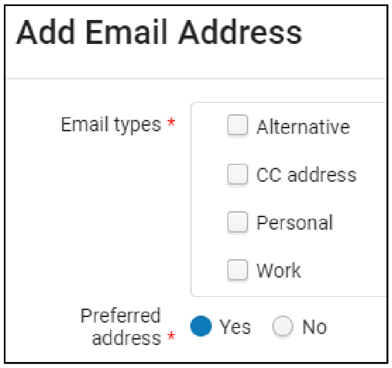
To add contact information:

1. In the **Contact Information** tab of the User Details page (**Admin > User Management > Manage Users**), select **Add Address**, **Add Phone Number**, or **Add Email Address**. The relevant dialog box opens.
2. Enter the contact details, as required.

   Note that you can set the address, phone number, and email address as preferred in this step, as shown below:



Note that the **Start date** and **End date** are for informational purposes only. The **Start date** is the date from which the address is relevant and the **End date** is the date after which the address is no longer relevant.

Note

When working with an external user, the **Add as an external** checkbox appears. Select this option to add the contact information as external data which is overwritten during SIS synchronization. If you do not select this checkbox, the contact information is added as internal data and is not overwritten during SIS synchronization. For more information, see https://developers.exlibrisgroup.com/alma/integrations/user-management/sis.
Internal fields cannot be turned into external – they need to be removed instead.

---

3. Save the details to the **Contact Information** tab as follows:
   - Select **Add** to save the details and add additional entries.
   - Select **Add and Close** to save the address details and exit the dialog box.

Note

When saving external data, a green check mark appears in the **External Data** column.

To edit, duplicate, or delete contact information, select the relevant action in the row actions list.

Managing User Identifiers (Tab)

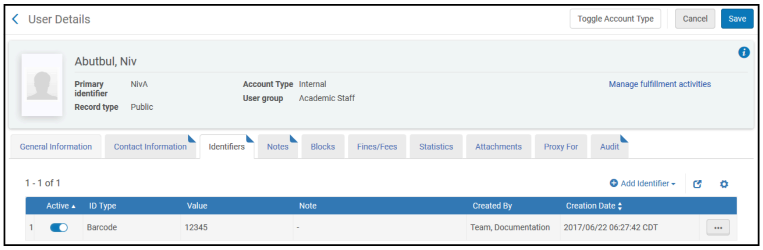
Note

The **Identifiers** tab is not available for Contact users.

In addition to a primary identifier, you can associate any additional defined user identifier types with a user, such as a student ID, barcode, social login ID, a link to a photograph of the user, and so forth. For more information about identifier types, see Managing User Identifiers.

For institutions that were live in Alma prior to June 2018, additional identifiers are case-sensitive. For institutions that went live from June 2018 onward, additional identifiers are not case-sensitive. For more details regarding case sensitivity of identifiers, see the detailed blog post on the Ex Libris Developer Network.

The table on the **Identifiers** tab of the User Details page (**Admin > User Management > Manage Users**; select **Edit** in the row actions list) functions like a mapping table. For more information, see Mapping Tables. You can add, edit, duplicate, and delete identifiers. You can also activate or deactivate an identifier.



User Details Page — Identifiers Tab

The fields are:

- **Identifier Type** - The type of identifier. Ex Libris creates and configures the types when setting up your institution. In addition to social media options, other options include barcode and institution ID (the ID assigned to the user from an SIS; see Student Information Systems). This list may be different for staff and public users.
- **Value** - The value of the identifier for this user.
- **Note** - An optional note.

Note

- All primary and additional identifiers must be unique for users, including for the same user.
- User identifiers associated with social logins (Twitter, Google, and Facebook) do not appear in this tab, even if they are defined for the user. They still exist: they can be used to log in using the social login page (see Social and Email Login), and you can search for the user using the identifier.
- When working with an external user, the **Add as an external** checkbox appears. Select to add the identifier as external data which is overwritten during SIS synchronization. If you do not select this option, the identifier is added as internal data and is not overwritten during SIS synchronization (unless the same value is later sent by the SIS, in which case the identifier is marked as external). For more information, see https://developers.exlibrisgroup.com/alma/integrations/user-management/sis.
- When defined by Ex Libris, some identifiers must be unique across the institution in order for the user to be able to log in to Alma or Primo.
- When saving external data, a green check mark appears on the in the **External Data** column.
- When a user is changed from internal to external, all internal identifiers become external.

Managing User Notes

A user's **Notes** tab contains additional features that are not available in other **Notes** tabs in Alma (see Notes Tab). You can attach internal or external notes to the user details. The notes entered for the various note types (for example, Address, Circulation, Library, Registrar) appear in the **User Notes** tab on the Patron Services page (see Patron Services Page – Loans Tab in Managing Patron Services), and in Primo on the Blocks & Messages page in the **My Account** tab.

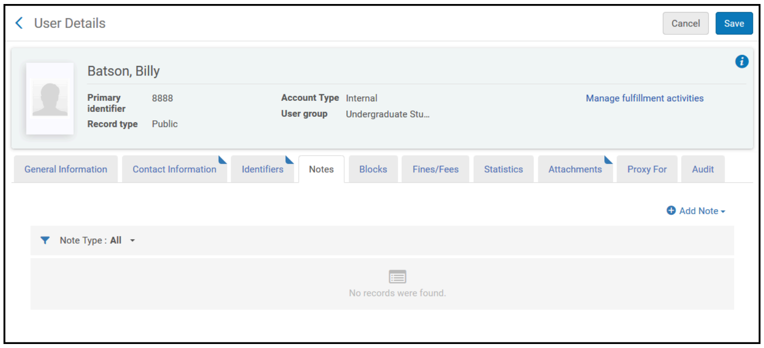
Note

The arbitrary order in which the notes appear in the **User Notes** tab on the Patron Services page cannot be controlled.

When library independence is activated for an institution, each note has an owner - either a specific library within the institution, or the entire institution. In this case, users can only see notes that are owned by the libraries that are either within these users' scopes (see Managing User Roles), or owned by the institution. Notes owned by libraries that are outside of a user's scope are not displayed in this tab, are not retrieved in searches, and are excluded from API calls. Library-level notes can only be activated in institutions in which library independence is turned on. For additional information about library independence, see Fulfillment Library Independence.

You manage user notes on the **Notes** tab of the User Details page (**Admin > User Management > Manage Users**; select **Edit** in the row actions list). You can add, edit, duplicate, and delete notes.

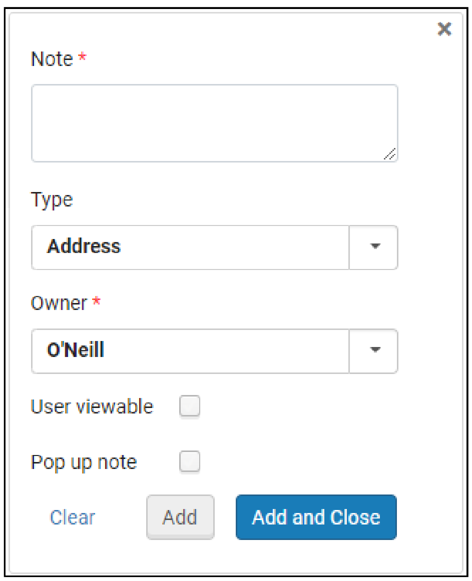
For more information, see Notes and Blocks. (2:10 min)



User Details Page — Notes Tab

To add notes:

1. In the **Notes** tab, select **Add Note**. The Add Note dialog box appears.



2. Under **Note**, enter the text of the note.
3. Under **Type**, select a note type. The types of notes are for informational purposes only and do not serve a functional purpose in Alma. The list of note types is standard across all institutions.
4. Under **Owner**, select the library that owns the note. Only users whose role is scoped to this library will be able to see this note. This option only appears if library independence is activated for the institution (see Fulfillment Library Independence).
5. Select **Pop up note** to make the note pop up when the user record is displayed in the Manage Patron Services page.
6. Select **User viewable** to enable the indicated user to view the note.

Note

When working with an external user, the **Add as an external** checkbox appears. Select this option to add the note as external data which is overwritten during SIS synchronization. If you do not select this option, the note is added as internal data and is not overwritten during SIS synchronization. For more information, see https://developers.exlibrisgroup.com/alma/integrations/user-management/sis.

---

7. Save the note:
   - Select **Add** to save the note details and add additional notes.
   - Select **Add and Close** to save note details and close the Add Note dialog box.

   If a user has a saved note, a check mark appears in the **Notes** column on the Find and Manage Users page for that user.

Note

When saving external data, a green check mark appears on the in the **External Data** column.

To edit, duplicate, or delete a note, select the relevant option from the row actions list. You can also select the note text in the **Note** column to edit the note.

Blocking and Unblocking Users

Note

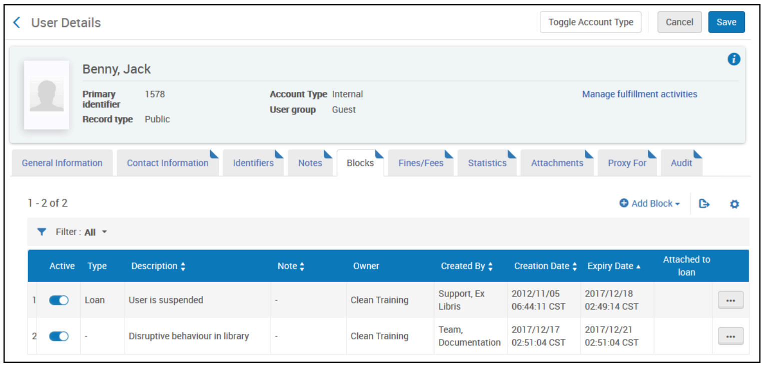
The **Blocks** tab is not available for Contact users.

You restrict users from using library services by adding *user blocks*. Blocks are added for users who have fines, outstanding loans, or repeated late book returns. A blocked user is prevented from performing actions on items in the library, such as borrowing, renewing, and so forth. The block note is displayed in Primo if the patron is blocked from requesting by the block. The blocks that can be assigned to a user are configured on the User Block Definitions mapping table page (see Configuring User Block Descriptions and Definitions).

Note that items or users can also be blocked based on other conditions; see Configuring Block Preferences.

The table on the **Blocks** tab of the User Details page (**Admin > User Management > Manage Users**; select **Edit** in the row actions list) functions like a mapping table. For more information, see Mapping Tables. You can add, edit, duplicate, and delete user blocks. You can also activate or deactivate a user block.

For more information, see Notes and Blocks. (2:10 min)



User Details Page — Blocks Tab

The fields are as follows:

- **Block description** - The block type. This list is pre-configured by Ex Libris.
- **Expiry Date** - An optional date when the block will be lifted.
- **Owner** - The library that owns the block. Only users with a role scoped to this library will be able to see this block. This option only appears if the library independence is activated for the institution (see Fulfillment Library Independence).
- **Note** - An optional note.
- **External Block Owner** - The name of the institution from which the block comes (see Configuring Consortial Blocks). By default this option is not displayed. In order to display it, select the gear icon next to the Add Block button and mark the checkbox next to **External Block Owner**. Note that this field is populated for blocks that have been copied from a target institution (another institution where the patron is a guest), but not for blocks that have been copied from a source institution (the patron's home institution). Note that by default, this field is not displayed. To display it, mark it in the Customization menu (see New Layout).

Note

- When working with an external user, the **Add as an external** checkbox appears. Select this option to add the block as external data which is overwritten during SIS synchronization. If you do not select this option, the block is added as internal data and is not overwritten during SIS synchronization. For more information, see https://developers.exlibrisgroup.com/alma/integrations/user-management/sis.
- If a user has an active block, a check mark appears in the **Blocks** column on the Manage Users page for that user.
- When saving external data, a green check mark appears in the **External Data** column.

Managing User Fines and Fees

Note

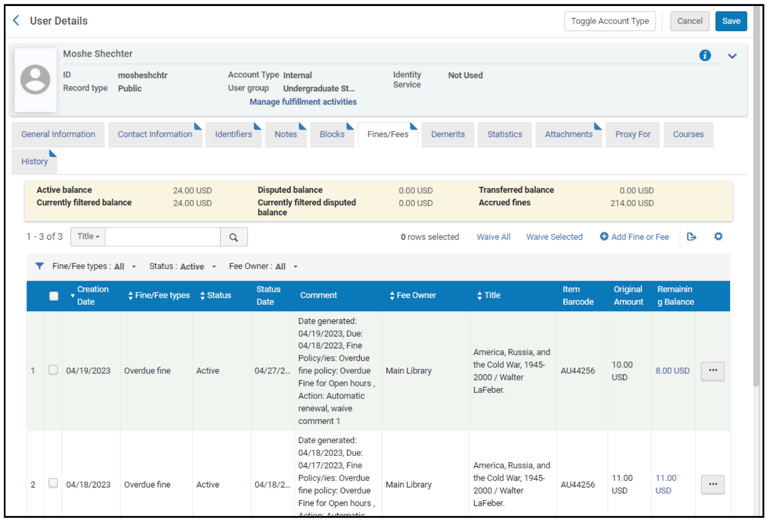
- The **Fines/Fees** tab is available only for users with the **Patron** role.
- The Circulation Desk UI also supports managing fines and fees with additional functionality. See Managing Fines and Fees.

You manage user fines and fees on the **Fines/Fees** tab of the User Details page (**Admin > User Management > Manage Users**; select **Edit** in the row actions list).

Users can select fines and fees across the full paginated fees list (among multiple pages) and waive them by selecting the **Waive All** option in the Fines/Fees tab.

Note

It is not possible to waive more than 100 selected fees in one action. This limit can be configured with the waiving_fines_fees_limit parameter (see [Configuring Other Settings](#)). For waiving fines and fees (specifically or in bulk) on the Manage Patron Services page, see [Managing Patron Services at a Circulation Desk](#). You can also use a dedicated job to waive fines and fees in bulk (see [Waiving Fines and Fees Using a Job](#)).



User Details Page - Fines/Fees Tab

The **Fines and Fees Summary** area shows a summary of the user's balance, including:

- **Active balance:** The balance of fines and fees. This may include transferred balance depending on the **allow_activity_on_transferred_finesfees** parameter. See [Configuring Other Settings (Fulfillment)](#).
- **Currently filtered balance:** The balance of fines and fees that are currently filtered due to your selections in the filters.
- **Disputed balance:** The balance of disputed fines and fees.
- **Currently filtered disputed balance:** The balance of disputed fines and fees that are currently filtered due to your selections in the filters.
- **Transferred balance:** When bursar fees are set to **Exported** status, they appear as transferred balances.
- **Accrued fines:** Additional fines that may still be increasing, because the patron has not yet returned an overdue loan. Note that accrued fines are not included in the calculation of the debt limit that, if reached, would prevent the patron from borrowing additional items (see [Patron Configurations](#)).

Note

Accrued fines are calculated only if the patron does not have more than 100 overdue loans.

The **Fines and Fees Details** area lists transaction details of the user's fines and fees. When the **Status** filter is set to **Active** (default), disputed, waived, transferred, and closed fees remain hidden. To see all fees, select **All** for this filter. To limit the fines/fees shown for a specific owner, select the library in the **Fee Owner** filter.

Watch the Filter Fines and Fees by Owning Library video (1:05 min).

You can customize the Fines and Fees Details view by selecting the Column Display icon above the details area. The columns selected by default are:

- Creation Date
- Fine/Fee Type
- Status
- Status Date
- Comment
- Fee Owner
- Title
- Item Barcode
- Original Amount
- Remaining Balance

The additional columns that may be displayed are:

- Original VAT
- Remaining VAT
- Bursar Transaction ID - see Configuring Bursar Transaction IDs.
- Waive Reasons

You can add or waive a fine or fee, indicate that a fine or fee is under dispute, and link the fine or fee to a repository item. A disputed fine or fee can be waived or restored. A waived fine or fee cannot be restored. When a fine or fee has not been paid, waived, disputed, or exported to the bursar system, it is **Active**. Performing one of these actions changes its status.

To waive fines in bulk, see Waiving Fines in Bulk. To configure when and to whom notifications are sent about fines and fees, see Configuring Fines/Fees Notifications.

A disputed fee:

- Is not included in the user's Active Balance
- Is not displayed on the list of fines in Primo
- Is not factored when invoking a block based on the amount due.

  For example:

  - A patron cannot borrow items when the amount they owe is $100 or greater
  - The patron owes $100, but has disputed $20 of that amount
  - Alma views the patron as owing $80, and the block is not invoked

A user can pay fines or fees at any circulation desk that is set up to receive payments. For more information, see Receiving Payment for Fines and Fees.

To enable waiving a fine or fee (including a credit), you must ensure that the specific fine/fee is configured as waivable on the Fine Fee Type Definition mapping table (see Configuring Fines/Fees Behavior). When paying or waiving a fine or fee, the transaction creator is the circulation desk (indicated in the **Currently at:** field at the top of the page). If no circulation desk indicated in this field, the transaction creator is indicated as **Not at desk**.

You can update the institutional bursar on a regular basis with the user fines and fees managed by the system using a Bursar integration profile. For details, see Bursar Systems.

For more information assigning a fine/fee to a specific item, see the Link Fee to Inventory video (2:56 mins).

To add fines and fees:

Note

If the fine or fee is listed as owned by **Library** on the Fine Fee Type Definition mapping table (see Configuring Fines/Fees Behavior), you must be at a circulation desk to add the fee.

In order to register a Credit, select the Credit fee type and enter the amount as a positive sum. When you save it, the Credit fee appears in the Fines/Fees list with a negative amount. If you select the Credit fee type, the **Comment** field is mandatory.

---

1. In the **Fines/Fees** tab, select **Add Fine or Fee**. The Add Fine or Fee dialog box appears.
2. Select the fine/fee type. The types are those configured for manual creation on the Fine Fee Type Definition mapping table; see Configuring Fines/Fees Behavior.
3. Select the owning library or institution. Libraries are selectable only if the fee type has been defined as 'allow a library scope'.
4. Enter the amount of the fine or fee (The amount cannot be negative).
5. In the **Item barcode** field, browse for the item to which you want to attach the fee, as required.

   When adding a barcode, the fine/fee is associated with the item specified by the barcode. The item and barcode appears on the Fines/Fees tab of the User Details page.

6. In the **Comment** field, optionally enter a comment for the fine or fee, as needed.

   Note

   If you select the **Credit** fee type, the **Comment** field is mandatory.

   ---

7. Save as follows:
   - Select **Add** to save the fine or fee details and add additional fines or fees.
   - Select **Add and Close** to save fine or fee details and close the Add Fine or Fee dialog box.

   The patron's active balance is updated with the amount added; if the fine/fee is subject to VAT, VAT is included to the amount. (The VAT columns are hidden by default on the page. To configure the VAT, see Configuring Fines/Fees Behavior.) For a **Credit** type fee, the amount is subtracted from the balance. For all other fee types, the amount is added to the balance.

To link an existing fine/fee to a repository item:

1. In the Fines and Fees tab of the User Details page, select **Link to Item** in the row actions list for a Fine/Fee. The Link to Item page appears.

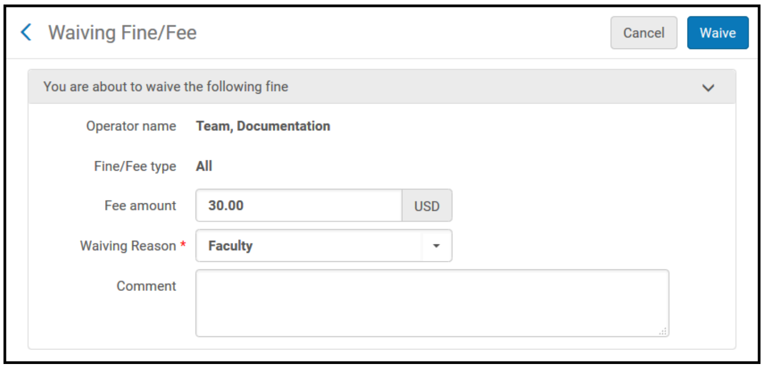
2. In the Item barcode field, browse for the item to which you want to attach the fee.
3. Select **Link to Item**. The **Title** and **Item Barcode** column values on the Fines and Fees Details page update accordingly.

To view a loan's history

In the **Fines/Fees** tab, select the fines/fees you want to waive and select **View Loan** in the row actions list. The Loan Audit Trail page appears. For more information, see Viewing Loan History.

To waive a fine or fee:

1. In the **Fines/Fees** tab, select the fines/fees you want to waive and select **Waive Selected** in the table actions list. Alternately, select **Waive** in the row actions list for the fine/fee that you want to waive. The Waiving Fine/Fee page appears.



Waiving Fine/Fee Page

2. Enter the amount of the fee you want to waive in the **Fee amount** field.
3. In **Waiving reason** select a reason for waiving the fee (this list is predefined by a system administrator; see Configuring Reasons for Waiving Fines/Fees).
4. Enter any text/comment for waiving the fine or fee in the **Comment** field.
5. Select **Waive**. and select **Confirm** in the confirmation dialog box. The amount that is waived is deducted from the amount of the fine or fee (in the **Original Amount** column), and the balance owed for the fine or fee in the **Remaining Balance** column is reduced. The balances shown in the **Fines and Fees Summary** area for **Active balance** and **Disputed balance** are updated.

To view the transactions for any fine or fee, select the amount link in the **Remaining Balance** column.

Note

If a lost item is waived, there is no reduction in the **Remaining Balance** value. Instead, the waived amount is displayed as a credit.

To dispute fines or fees:

1. Select **Dispute** in the row actions list for the fine or fee that you want to dispute. The Dispute Fine/Fee page appears.
2. Enter any text/comment for disputing the fine/fee in the **Comment** field.
3. Select **Dispute** and select **Confirm** in the confirmation dialog box. The balances shown in the **Fees and Fines Summary** area for **Active balance** and **Disputed balance** are updated.

To restore fines or fees:

1. Select **Restore** in the row actions list for the disputed fine or fee that you want to restore (ensure the **Status** filter is set to **All** or **In Dispute**). The Restore a Fine or Fee page appears.

   Note

   Only fines or fees that are in dispute can be restored.

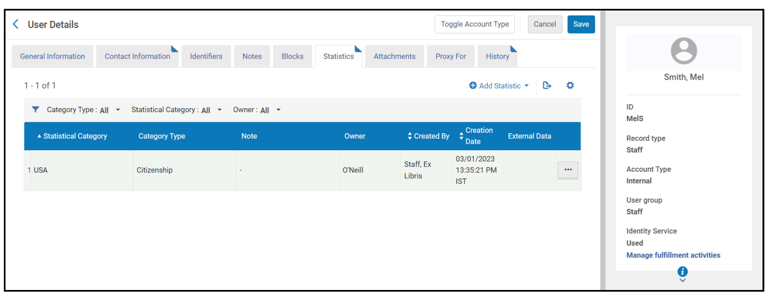
   ---

2. Enter any text/comment for restoring the fine or fee in the **Comment** field.
3. Select **Restore** and select **Confirm** in the confirmation dialog box. The original amount of the fine or fee (in the **Original Amount** column) is restored, and the balance owed for the fine or fee in the **Remaining Balance** column is adjusted. The balances shown in the **Fees and Fines Summary** area for **Active balance** and **Disputed balance** are also updated.

Managing User Statistics

Analytics reports can break down or filter users by user group, job category, and so forth. In addition to these categories, you can add additional statistical categories to the user specifically to use in Analytics reports or fulfillment-unit rules. An administrator must first configure statistical categories and category types, and then map statistical categories to category types, in the User Management configuration area (see Configuring Statistical Categories for Analytics).

You add statistical categories to the table on the **Statistics** tab of the User Details page (**Admin > User Management > Manage Users**; select **Edit** in the row actions). This table functions like a mapping table. For more information, see Mapping Tables. You can add, edit, duplicate, and delete categories for the user.



User Details Page - Statistics Tab

The fields in this tab are as follows:

- **Category type** - Category types are predefined by a system administrator in the Statistical Categories Types mapping table (see Creating Statistical Category Types).
- **Statistical category** - Statistical categories are predefined by a system administrator in the Statistical Categories context of User Management Configuration (see Configuring Statistical Categories).
- **Note** - Add a note as required.
- **Owner** - When library independence is activated for an institution, this field appears in the **Statistics** tab. In this case, users can only see statistical information that is owned by the libraries that are within these users' scopes (see Managing User Roles). Information that is outside of a user's scope is not displayed in this tab, is not retrieved in searches, and is excluded from API calls. Library-level statistics can only be activated in institutions in which library independence is turned on. For additional information about library independence, see Fulfillment Library Independence.

Note

- When working with an external user, the **Add as an external** checkbox appears. Select this option to add the statistical category as external data which is overwritten during SIS synchronization. If you do not select this option, the statistical category is added as internal data and is not overwritten during SIS synchronization (unless the same value is later sent by the SIS, in which case the statistical category is marked as external). For more information, see https://developers.exlibrisgroup.com/alma/integrations/user-management/sis.
- When saving external data, a green check mark appears on the in the **External Data** column.

Managing User Attachments

You can add attachments for a user. You manage attachments on the **Attachments** tab of the User Details page (**Admin > User Management > Manage Users**; select **Edit** in the row actions list). For more information about this tab, see Attachments Tab.

Attachments added manually to this page are not sent to the user; they are simply appended to the user's record for reference.

Attachments sent to the user in a letter (see Configuring Alma Letters) also appear on this page. If a patron states that they did not receive a notification email that was sent by Alma, you can resend the attachment to the patron's preferred email address. To resend an attachment, select **Resend Notification** in the row actions list. Alma resend the attachment to the user. The letter used for this is Resend Notification Letter.

When library independence is activated for an institution, the Owner field appears in the **Attachments** tab. In this case, users can only see attachments that are owned by the libraries that are within these users' scopes (see Managing User Roles). Information that is outside of a user's scope is not displayed in this tab. Library-level attachments can only be activated in institutions in which library independence is turned on. For additional information about library independence, see Fulfillment Library Independence.

Managing Proxy Users

You can define one user to be a proxy user for another. A proxy user can loan and return items on behalf of another user (see Selecting a Patron). You manage proxy users on the **Proxy For** tab of the User Details page (**Admin > User Management > Manage Users**; select **Edit** in the row actions list).

Any user can be a proxy user, but the target user for whom the proxy performs actions must have the **Patron** role. You can add and remove patrons for which a user is a proxy.

To add a proxy user:

1. Open the **Proxy For** tab of the User Details page. Select **Add Proxy For**.
2. In the **Proxy for** field, enter or select the patron for whom you want the current user to be a proxy.
3. Select **Add User**. The patron is added; the user is now a proxy for this patron.

To remove the patron, select **Delete** in the row actions list.

Note

A user record may be created as a Fulfillment Proxy at the time the new user record is created. Unlike the regular circulation proxy, the Fulfillment Proxy is a full proxy, for example not only are this patron's loans associated with the sponsor, but also the patron's requests and resource sharing requests. Emails that have to do with the request, such as hold shelf notifications and request reminders are also sent to both the proxy user and the sponsor user.
The Fulfillment Proxy cannot be unlinked from the sponsor record and cannot place requests or check out items without the request or loan being associated with the sponsor record. In addition, requests placed by the Fulfillment Proxy are listed in both the proxy's and the sponsor's My Account in Primo.

While Fulfillment Proxy users can request both local and AFN items on behalf of the Proxy Sponsor, and Fulfillment Proxy and Proxy Sponsor users receive On Hold Shelf notifications for local items, only the Proxy Sponsor receives On Hold Shelf notification emails for AFN items. The Fulfillment Proxy does NOT also receive the letter for AFN items on hold.

Viewing Changes to the User Record

Changes made to the user record are recorded in the **History** tab of the User Details page (**Admin > User Management > Manage Users**; select **Edit** in the row actions list). For more information, see History Tab. In addition to tracking changes made in the Alma UI, changes made by SIS, APIs, linked account refreshes, and the Update/Notify Users job are also captured.

Note

Access to a user history may be limited by user role.

For information about limiting access to certain user roles, contact Ex Libris support.

Changes to the Last patron activity date are not recorded in the user's History tab. For more information on the Last patron activity date, see Managing Users and Configuring Last Patron Activity Date.

The History information can be filtered by All, Last 7 days, Last month or Last year. By default the information is filtered by Last 30 days.

History Tab

Only changes related to the following fields are displayed in the user history tab:

- General Tab:
  - user name
  - first name

    - last name
    - middle name
    - user title
    - pin number
    - job title
    - campus code
    - user group
    - user language
    - expiry date
    - purge date
    - rs library code
    - cataloger level
    - record type
    - password
- address
- phone
- email
- identifiers
- notes
- blocks
- proxy for
- roles

The length of time that the user audit trail record is retained is determined by the **user_audit_retention_period** parameter. See Configuring Other Settings. A weekly job, **User audit purge with retention**, deletes history records that are older than the value of the retention period.

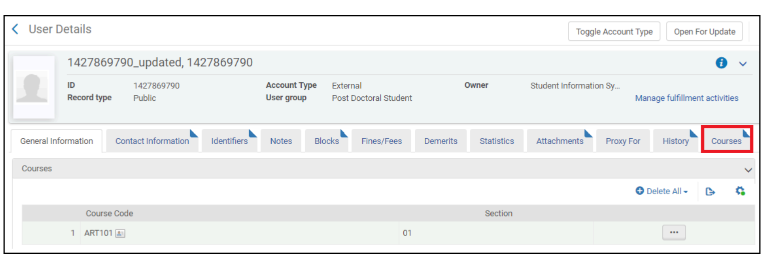
Note

Any updates to the user record update the **created by/modified by** fields.

Managing Courses

(Leganto only) The Courses tab allows you to view all courses to which a student has enrolled and to delete specific courses or all courses to which a student has enrolled.

For information on how to load user enrollment information, see Configuring Importing Course Enrollment Jobs.



Managing User Pictures

You can manage user pictures on an external server and have them appear in the User Details page in Alma. To do this, you must first configure the following parameters (see Configuring Other Settings):

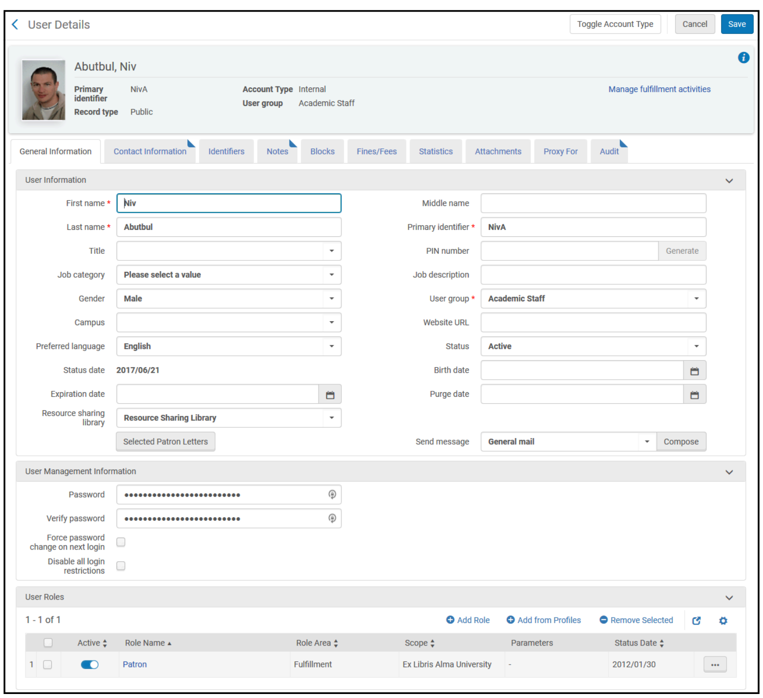
Note

When using a photo server (secured or not secured, i.e. https or HTTP), you must open access to campus staff member computers.

- **photo_server_url** - The URL to the location (directory) containing user pictures. The URL must use HTTPS. In order to use HTTPS, the certificate may not be self-signed and must be signed by a known certificate authority (the list of supported certificates can be found here). The URL must end with a forward slash (`/`). For example, `http://institution.edu/pictures/` .
- **photo_identifier_type** - The user identifier to use as the user picture file name. Possible values are: **USERNAME** (the primary ID) or a code in the User Identifier Types code table (see Viewing User Identifiers).
- **photo_suffix** - The suffix to use for the user picture file suffix. For example, `png` .

The advised size (in pixels) for user photos to be properly uploaded to the Patron cards is 160*190.

You view a user's picture on the User Details page (**Admin > User Management > Manage Users**; select **Edit** in the row actions list).



User Details Page with Picture

To add user pictures to Alma:

1. Upload user pictures to the directory defined in **photo_server_url** with the name <user identifier>.<photo_suffix>, for example 12345.png.
2. Ensure that each user has an identifier that matches the user picture file name. See Managing User Identifiers.

To edit or remove a picture, edit or remove the picture at **photo_server_url**. No action is required in Alma.

For more information, see How to configure the display of user pictures on the User Details and Patrons Services page in Alma.

Deleting Users

You can delete users if:

- They do not have a balance due on their account.
- They do not have outstanding loans.
- They do not have any assigned PO lines, POs, or invoices.
- They do not have any locked bibliographic records.
- They do not have any assigned import profiles.
- They are not currently working in the MD Editor.
- They do not have active Purchase Requests (Purchase Requests with the following status are considered 'not active' and do not prevent deleting a user: Rejected, Approved, Order Complete, To be Canceled, Failed, Cancelled).
- The user record is not currently locked by a running job.
- (If Esploro is enabled for your institution) they have associated assets or grants.

Note that the purge users job does not delete users with Resource Sharing requests that are on the Hold shelf (see Configuring User Deletion).

When a user is deleted using the procedure below, it is fully deleted. No statistical or reportable data is maintained.

Note

Delete only **Staff** or **Public** users. **Contact** users are reserved for vendors and should not be deleted.

To delete users in bulk, see Purging Users.

To delete a user:

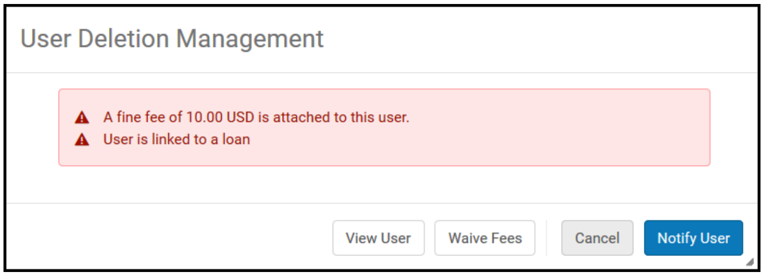
1. On the Find and Manage Users page (**Admin > User Management > Manage Users**), select **Delete** in the row actions list for the user you want to delete. A confirmation dialog boxes appears.

   Note

   Find the user record you want to delete using the persistent search bar's 'Users' option.

   ---

2. If the user can be deleted, select **Confirm**. The user is deleted.
3. If the user cannot be deleted, a message such as the following appears.



User Deletion Management Dialog Box

Choose one of the following options:

- **Cancel** – Do not delete the user.
- **View User** (appears only when fines/fees are attached to the user) – See Editing Users.
- **Waive Fees** – See Managing User Fines and Fees. A new confirmation dialog box appears, where you can confirm that you want to delete the user.
- **Notify User** (appears only when fines/fees are attached to the user) – Send the User Deletion Letter informing the user that there is a balance due on the user's account. A copy of the email is added to the **Attachments** tab (see Managing User Attachments). For more information on configuring the letter, see Configuring Alma Letters.

Distributing Users

You can distribute a user to all member institutions implementing a Network Zone. For more information, see Distributing Users Across a Network Zone. For additional user sharing options in a fulfillment network, see Linking Users in Fulfillment Networks.