

# How to Add a Patron to the Database

This workflow guides WRLC staff through creating new patron records in Ex Libris Alma.

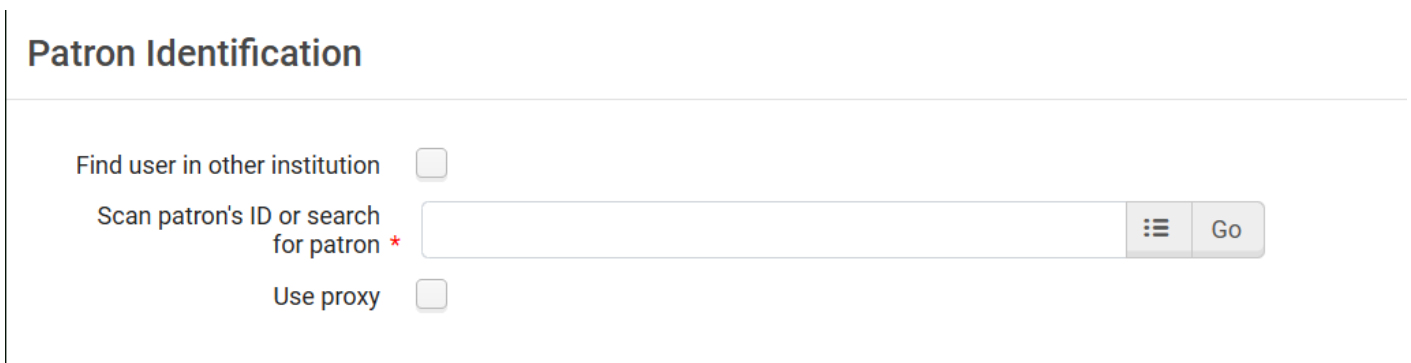
## Required Roles

The options available under the Fulfillment menu are dependent upon your assigned user roles. Your list of options may be different than the screenshots included below. If you do not have the necessary options, you will need to work with your institution's User Administrator to be assigned the appropriate roles for your work.

To complete Fulfillment tasks outlined in this document, you must have one or more of the following roles:

- Circulation Desk Manager
- Circulation Desk Operator
- Circulation Desk Operator - Limited
- Physical Inventory Operator

**1: Navigate to the Patron Registration Screen** In the left-hand navigation panel, select: Fulfillment> Checkout/Checkin>Manage Patron Services. The <Patron Identification> screen will appear



Patron Identification

Find user in other institution

Scan patron's ID or search for patron \*

Use proxy

**2: Initiate New Patron Registration** Click the <Register New User> button at the bottom of the Patron Identification screen



Patron Identification

Find user in other institution

Scan patron's ID or search for patron \*

Use proxy

- This opens the Quick User Management screen

< Quick User Management Cancel Update User

Not local

Find user in other institution

Proxy Settings  i

Add as a fulfillment proxy

User Details

USER INFORMATION

First name *	<input type="text"/>	Middle name	<input type="text"/>
Last name *	<input type="text"/>	Preferred first name	<input type="text"/>
Preferred middle name	<input type="text"/>	Preferred last name	<input type="text"/>
Primary identifier *	<input type="text" value="20862499620004102"/>	Job category	<input type="text" value="Please select a value"/>
User group *	<input type="text" value="Please select a value"/>	Birth date	<input type="text"/>
Expiration date *	<input type="text"/>	Purge date	<input type="text"/>
Cataloger level	<input type="text" value="[00] Default Level"/>	<input type="text" value="Selected Patron Letters"/>	

**3: Complete Required Fields** Fill out all fields marked with a red asterisk (★); these are mandatory for Alma’s user record validation and for Student Information Systems (SIS) matching.

User Details

USER INFORMATION

First name *	<input type="text"/>	Middle name	<input type="text"/>
Last name *	<input type="text"/>	Preferred first name	<input type="text"/>

Required Fields Include:

- First Name
- Last Name
- Primary Identifier
- User Group
- Expiration Date
- Purge Date
- Email Type
- Email Address

**Why This Matters:** Alma validates user data using the Primary Identifier and User Group fields to determine circulation rights.

Incomplete records will fail SIS matching or cause fulfillment errors during checkout.

**Note:** WRLC agreed best practices include that the Purge Date should align with the institution’s data-retention policy (often one year post-expiration). Setting it too soon may delete active records prematurely.

**4: Determine SIS Inclusion**

- If the patron will **not** be included in future Student Information System (SIS) uploads skip to Step 6- Ex:
  - Alumni
  - Community borrowers
  - Library staff internal accounts
- If the patron **will** be included in future SIS uploads, continue with Step 5- Ex:
  - Students, faculty, or staff newly onboarded since the last SIS run

**Note:** This distinction determines whether Alma should treat the user as a locally managed record <Internal> or one that will later synchronize automatically with the SIS (External). Incorrectly flagging a user as “SIS-managed” may result in their record being overwritten or deleted during the next SIS import.

### 5: Set the “Patron Has Institutional Record” Flag; for SIS-Managed (External) Users

- Verify that the <Primary Identifier> field is entered correctly; this field is the key matching field for SIS imports and must be identical to the value used in the institutional system

Last name \*   
 Preferred middle name   
**Primary identifier \* 5223415010004108**  
 PIN number    
 Job description

- Navigate to the <User Management> Information section

#### USER MANAGEMENT INFORMATION

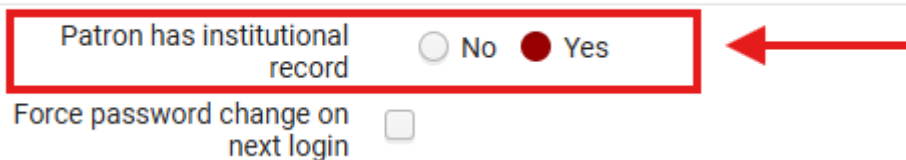
Patron has institutional record  No  Yes  
 Password   
 Verify password   
 Force password change on next login

- Change <Patron has institutional record> from No to Yes

## USER MANAGEMENT INFORMATION

Patron has institutional record  No  Yes

Force password change on next login



- After changing it, the screen will refresh automatically.

**Why This Matters:** This tells Alma to expect future updates from your SIS, enabling automatic synchronization of user data (name, contact info, expiry, etc.) and prevents duplicate user creation when future SIS loads occur; incorrect flagging may cause “stale” data issues where patron updates fail to load

**6: Set Passwords for Locally Managed (Non-SIS) Users** If the patron **will not** be updated by SIS (e.g., alumni, community, internal accounts). Non-SIS patrons do not receive automatic credential provisioning. This step ensures they can authenticate for library discovery and My Account access:

- Enter a temporary password in the Password and Verify Password fields

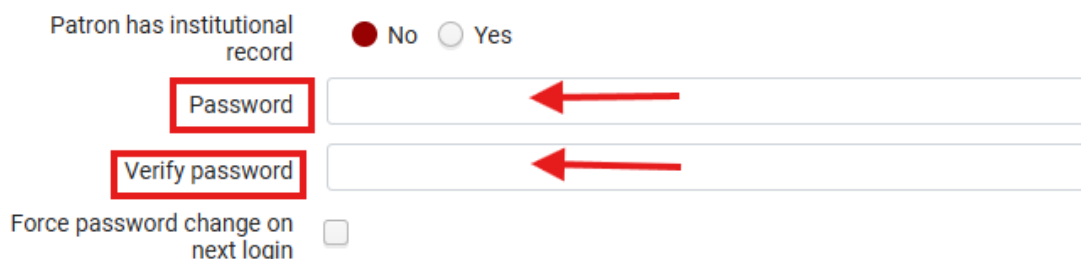
## USER MANAGEMENT INFORMATION

Patron has institutional record  No  Yes

Password

Verify password

Force password change on next login



- Optionally check the “Force password change on next login” box; this ensures the patron sets a secure password later

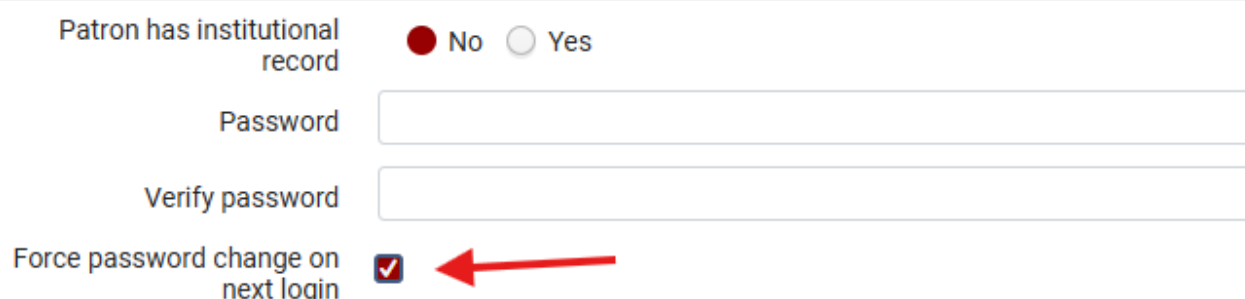
## USER MANAGEMENT INFORMATION

Patron has institutional record  No  Yes

Password

Verify password

Force password change on next login



**Note:** These credentials allow login to Primo VE using their Primary Identifier and password; consider using <Force password change> for all community borrower accounts to prevent password reuse

**7: Save the New Record** Once all required fields are complete, click <Update User>. The system saves the patron record and returns you to the Manage Patron Services screen with the newly created user loaded automatically. The <Update User> action both commits the record and links it to your current Fulfillment desk for immediate use (e.g., for item checkout).



The screenshot shows the 'Quick User Management' interface. At the top right, there are two buttons: 'Cancel' and 'Update User'. The 'Update User' button is highlighted with a red rectangular box, and a red arrow points upwards towards it from the right side of the form. The form itself has several sections: 'Not local' with a checkbox for 'Find user in other institution', 'Proxy Settings' with a checkbox for 'Add as a fulfillment proxy' and a blue information icon, and 'User Details' at the bottom with a dropdown arrow.

## Frequently Asked Questions

- *What happens if I create a record for a patron who later appears in an SIS upload?*
  - The SIS upload will attempt to match on Primary Identifier. If it differs, a duplicate record will be created. Always use the same ID used by SIS.
- *Can I convert a locally managed patron into an SIS-managed one later?*
  - Yes, by editing the record and switching “Patron has institutional record” to “Yes,” provided the Primary Identifier matches.
- *How do I handle staff who need multiple roles (patron + operator)?*
  - Assign both roles within one account. Do not create separate records. Use the “Roles” tab to add operator permissions.
- *What if a community borrower forgets their password?*
  - Use User Management> Reset Password. For security, verify identity before issuing a reset.
- *If the SIS field “Patron has institutional record” is set incorrectly, can it be changed safely?*
  - Yes, but verify SIS configuration first.
- *What if I forget to fill in a required field?*
  - Alma will not save the record; missing fields are highlighted in red. Fill them and retry.
- *How can I import multiple local patrons at once?*
  - Use the User Load Integration Profile under Admin> Manage Jobs for batch uploads.

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Revision #3

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