

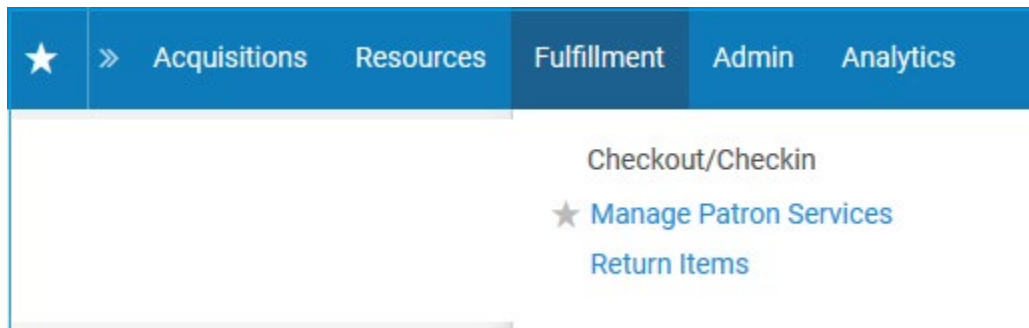
## Adding Patron Accounts

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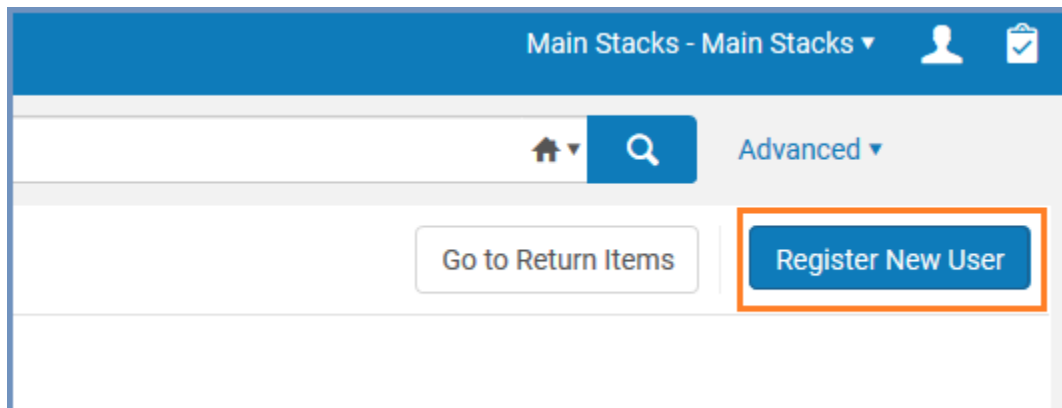
Alma video: [Day-to-Day User Management](#)

There are two types of patron accounts in Alma. Internal user accounts are created manually by library staff and managed entirely in Alma; examples include Courtesy Card borrowers and Interlibrary Loan institutions. External user accounts, such as student, faculty, and staff accounts, are managed outside of Alma by a Student Information System. The records are loaded into Alma from the SIS and synchronized on a regular basis. External accounts can be added manually if needed before an automatic load has been run.

1. Go to “Fulfillment” and select “Manage Patron Services”



2. Click on the “Register New User” button in the upper right corner.



3. Fill in all the relevant patron information on the Quick User Management screen, including name, primary identifier\*, user group, expiration date, and contact information. The required fields are marked with a red asterisk.

\*Note: the primary identifier is the patron’s @illinois.edu email address if they have a NetID. If they don’t have a NetID, e.g. some Courtesy Card patrons, use their UIN followed by @alma. For example, 123456789@alma. The field will be auto-filled with a number generated by Alma but it can be overwritten.

include NetID (Scoped – includes domain) Look up why again, i.e. what happens if you don’t enter the UIN

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"/>
<b>Primary identifier *</b>	<b>5469007030005899</b>	Title	<input type="text"/>
Job category	<input type="text" value="Please select a value"/>	PIN number	<input type="text"/> <input type="button" value="Generate"/>
Gender	<input type="text"/>	Job description	<input type="text"/>
Campus	<input type="text"/>	User group *	<input type="text" value="Please select a value"/>
Birth date	<input type="text"/> <input type="button" value="Calendar"/>	Preferred language	<input type="text" value="English"/>
Purge date *	<input type="text"/> <input type="button" value="Calendar"/>	Expiration date *	<input type="text"/> <input type="button" value="Calendar"/>
		Resource sharing library	<input type="text"/>

4. In the field “Patron has institutional record” select “No” if the record is for a Courtesy Card borrower or Interlibrary Loan patron. Select “Yes” for new students, faculty, and staff.

**USER MANAGEMENT INFORMATION**

Patron has institutional record  Yes  No

5. For Courtesy Card patrons, enter a temporary password that they will use to access their library account in Primo. It is not necessary to click the “Force password change” box as this setting does not work with Primo.

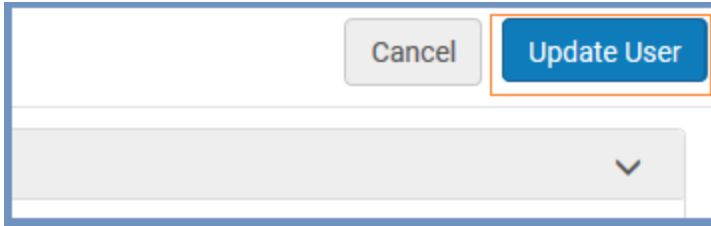
Note: The temporary password will be created by using the patron’s last name plus the last 4 digits of the UIN and a common symbol (such as a question mark, exclamation mark, or dollar sign). If the patron’s last name consists of only two letters, the first letter of their first name will be added to ensure the password is 8 characters long.

Password

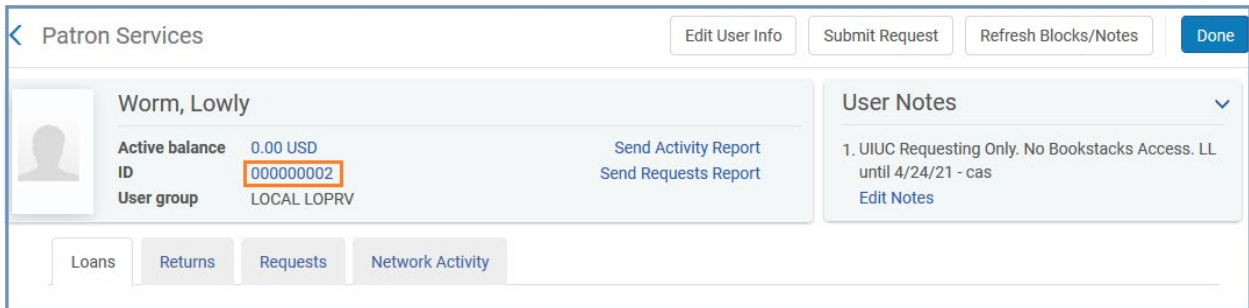
Verify password

**Force password change on next login**

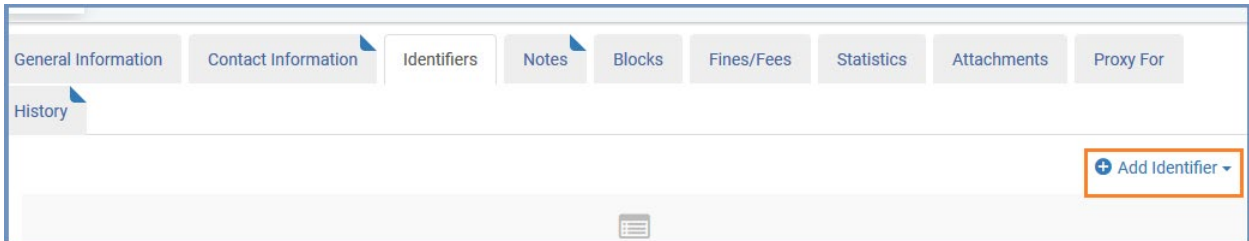
6. When the form has been completed, click the “Update User” button in the upper right corner. This will save the patron record and close the Quick User Management screen.



8. To add more information to the patron record, such as a barcode, notes, or a secondary address, click the patron's ID number which now displays on the new screen under the patron's name.



8. This will open the 'User Details' screen. Click the "Add Identifier" button at the lower right corner to add the patron barcode.



9. Select 'Barcode' from the drop-down menu under "Identifier Type." Enter the patron barcode in the "Value" field. If desired, a note may be added, viewable only in the barcode field. Click "Add" to enter another barcode or "Add and Close" to save the current barcode to the patron's record.

Identifier Type \*

Barcode

Value \*

Generate

Note

Clear Add Add and Close

10. To add the UIN, select 'Netid (Scoped - includes domain)' from the drop-down menu under "Identifier Type." Enter the patron's UIN in the "Value" field. Without the UIN in this field, external patrons will not update in the patron load.

11. To add a note to the patron's account, click on the "Notes" tab in the middle of the page.

Worm, Lowly

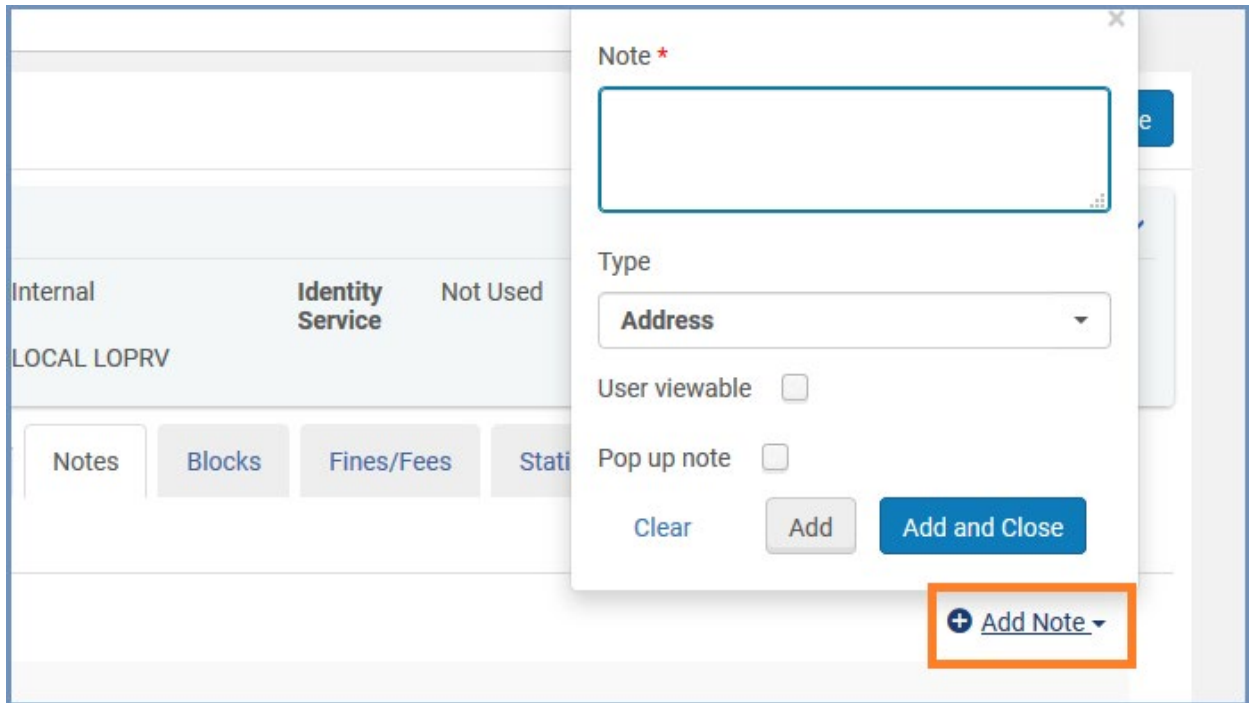
ID 546871122000... Account Type Internal Identity Service Used  
Record type Public User group LOCAL LOPRV

General Information Contact Information Identifiers **Notes** Blocks Fines/Fees Statistics Attachments Proxy For

History

12. At the right side of the screen, click the "Add Note" button. Type the text of the note in the box and choose the note type from the drop-down menu. Two additional options are to make the note a pop-up note and to make the note viewable to the patron in their Primo account. (Note: when adding a note to an external user's account, there is a third note option to 'add as an external.' This should not be used as it's possible the note could be overwritten by external updates.)

Click the "Add" button if adding a second note or click "Add and Close" to save the current note.



13. To add a secondary address, email address, or phone number, click on the “Contact Information” tab and choose the “Add” button on the right side above each respective entry. The primary, or preferred, form of contact will have a green check mark next to it. When entering additional contact information, you may change the default from ‘no’ to ‘yes’ if you wish to make it the preferred form of contact.

Preferred	Address	Created By	Creation Date	Type
1 ✓	1408 W. Gregory Dr.	stackstest	04/29/2020 09:34:50 CDT	Work

14. Click the “Save” button at the upper right corner of the screen when finished.