Adding a new Community record on Alma

For practice use ALMA Sandbox link: https://bit.ly/2nHHGhm

Under **Admin** click on **Manage Users**.

Search for **Borrower’s Name**. If they already have a record on **Alma** see section **Amending a Borrower Record** in the **Manual**. If they don’t have a record on **Alma** please continue as follows:

**Add user** (Right hand side of the screen). Select **Public**.

* **First Name** – include middle names in this box
* **Last Name**
* **Primary Identifier** – this is the **U4** barcode
* **User Group** – select **Community** from the drop down menu – this allocates the number of items they can borrow

**Date of birth** – when using the calendar, select the year first then the month and day.

* **Expiration date** – 6 months or 1 year depending on application until the end of the month.

  -- SCONUL use expiry date from their own Campus ID/Library card, year depending on their individual membership application.

**Purge Date** – please add a date exactly 2 years after the expiry date (GDPR Regulations)

**Resource Sharing** – **DO NOT USE** - Not entitled to ILLs

**Password** – Add in the borrower’s date of birth in the following format 03Nov1956

**Verify password** – Re-enter the date of birth in the following format 03Nov1956

**Email Address** - Email types: Tick the correct box and add in the email address. If the borrower does not have an email please use the following: Alma.externaluser@ncilac.uk

**Address** - Tick the correct box and add in the home address. The second one should be the work address. Navigate between fields consecutively using the TAB key when entering the address and please **Do not use** the City field – it does not appear in Alma letters.

**Phone Numbers** - Check the box and add in the correct phone number.

**Click Save and Continue**.

**Contact Information** - This is where you can enter additional borrower details (Second address – Department and building for Sconul, telephone number or email address). Click **Add** and **Close** after each step.

**Add Statistic** – The Category Type automatically defaults to **Patron Type**.

  o From the **Statistical Category** menu select the corresponding **Community/Com** category.

The record will be saved and the user will be able to perform all functions. Put the form in the box for the Registration Team to complete the next stage.
Adding a new Access record on Alma

For practice use ALMA Sandbox link: https://bit.ly/2nHHGhm

Under Admin click on Manage Users.

Search for Borrower's Name. If they already have a record on Alma see section Amending a Borrower Record in the Manual. If they don’t have a record on Alma please continue as follows:

Add user (Right hand side of the screen). Select Public.

* First Name – include middle names in this box

* Last Name

* Primary Identifier – this is the U7 barcode

* User Group – select Access - Buildings from the drop down menu – this allocates the number of items they can borrow

Date of birth – when using the calendar, select the year first then the month and day.

* Expiration date – 6 months or 1 year for Consultation
  
  For Building access, they should have a letter stating their expiry date

Purge Date – please add a date exactly 2 years after the expiry date (GDPR Regulations)

Resource Sharing – DO NOT USE - Not entitled to ILLs

Password – Add in the borrower’s date of birth in the following format 03Nov1956

Verify password – Re-enter the date of birth in the following format 03Nov1956

Email Address - Email types: Tick the correct box and add in the email address. If the borrower does not have an email please use the following: Alma.externaluser@ncLac.uk

Address - Tick the correct box and add in the home address. The second one should be the work address. Navigate between fields consecutively using the TAB key when entering the address and please Do not use the City field – it does not appear in Alma letters.

Phone Numbers - Check the box and add in the correct phone number.

Click Save and Continue.

Contact Information - This is where you can enter additional borrower details (Second address, telephone number or email address). Click Add and Close after each step.

Add Statistic – The Category Type automatically defaults to Patron Type.
  
  o From the Statistical Category menu select Access Consultation

The record will be saved and the user will be able to perform all functions. Put the form in the box for the Registration Team to complete the next stage.
Adding a new NHS record on Alma - Sandbox link: https://bit.ly/2nHHGhm

Ask the patron for their Job Title and tick the corresponding box at the back of the form (e.g. Research Staff Other – Please state). This will later be added to the Statistical Category field.

Under Admin click on Manage Users.

Search for Borrower’s Name. If they already have a record on Alma see section Amending a Borrower Record in the Manual. If they don’t have a record on Alma please continue as follows:

Add user (Right hand side of the screen). Select Public.

* First Name – include middle names in this box
* Last Name
* Primary Identifier – this is the U5 barcode
  Using sentence case

* User Group – select NHS from the drop down menu – this allocates the number of items they can borrow

Date of birth – when using the calendar, select the year first then the month and day.

* Expiration date – 30 April 2019

Purge Date – please add a date exactly 2 years after the expiry date (GDPR Regulations)

Resource Sharing – DO NOT USE - Not entitled to ILLs

Password – Add in the borrower’s date of birth in the following format 03Nov1956

Verify password – Re-enter the date of birth in the following format 03Nov1956

Email Address - Email types: Tick the Work box and add in their NHS email; failing that, their personal email.

Address - Tick the correct box and add in the address. One address should be their departmental, hospital, or practice address. Navigate between fields consecutively using the TAB key when entering the address and please Do not use the City field – it does not appear in Alma letters.

Phone Numbers - Check the box and add in the correct phone number.

Click Save and Continue.

Contact Information - This is where you can enter additional borrower details (Second address, telephone number or email address). Click Add and Close after each step.

Add Statistic - The Category Type automatically defaults to Patron Type.
  o From the Statistical Category menu select the type of NHS user category (job title).
  o In the Note box ENTER the two letter code for the Hospital or Trust e.g. RV for the Royal Victoria Infirmary. If you are unsure what the code is check in the NHS registration manual. Once you have completed all the sections click on Save.

The record will be saved and the user will be able to perform all functions. Put the form in the box for the Registration Team to complete the next stage.
NHS Trusts and codes

1. City Hospitals Sunderland NHS Foundation Trust ________________ SU
2. Clinical Commissioning Group ____________________________ CC
3. County Durham and Darlington NHS Foundation Trust ____________ DN
   Lead Employer Trust is hosted by the above - **DN**
4. Gateshead Health NHS Foundation Trust __________________________ GH
5. The Newcastle Upon Tyne Hospitals NHS Foundation Trust _________ NW
6. North Cumbria University Hospitals NHS Trust ________________ CA
7. North East Ambulance Service NHS Foundation Trust ____________ AM
8. North Tees and Hartlepool NHS Foundation Trust ________________ NT
9. Northumberland, Tyne and Wear NHS Foundation Trust ____________ MH
10. Northumbria Healthcare NHS Foundation Trust ________________ NO
11. South Tees Hospitals NHS Foundation Trust ________________ ST
12. South Tyneside NHS Foundation Trust ________________ SY
13. Tees, Esk and Wear Valleys NHS Foundation Trust ____________ TE

If the customer is employed at the following, just use the hospital code instead:

14. Royal Victoria Infirmary _________________________________ RV
15. Freeman Hospital _________________________________ FR