Create, edit or delete user accounts

Learn how to create, edit, and delete user accounts in the Admin module.

Create users

Create accounts for your users. Required fields may vary, depending on the services your library subscribes to. Additionally, if you are using a third-party authentication system, you will not see the Identity Management section.

Best practices for creating an account

- Follow the account naming conventions used by your institution when creating user names.
- If you are creating accounts for your staff members, make sure you tell them their user name soon after you create the account. They will need their user name to create a password.
- Create an account for each employee accessing the system. Staff should not share accounts.
- Do not re-use staff accounts.
- Delete accounts for staff who are no longer with your institution.

Create a user account

From the Admin section:

1. On the left navigation, under User Management, click New User.
2. On the Basic User Data panel, OCLC recommends filling in the following fields:
   - First Name: Highly recommended
   - Address, Phone Number, or Email Address: Email is highly recommended.
     - Note: In order to create an account, the user/patron requires a Primary email address. Enter an email address and select Primary next to the Email Type.
   - User Name (or Barcode): Required. If you cannot edit or do not see the User Name field, type in the Barcode field. Barcodes are case-sensitive when searching for users.
   - Home Branch: Required for some. Select the user's preferred branch from the list
   - Patron Type: Required for some. Select the patron type from the list
3. Click Create.
4. On the confirmation window, click OK. The user/patron account appears.
Assign roles to a user account

1. In the user account, expand the Roles accordion.
2. Within the Roles accordion, click Edit (on the far right).
3. Select the appropriate roles.
   ◦ For more information on the actions users can perform with individual roles, see Roles.
   ◦ All accounts must have the Everyone role assigned. The Everyone role is included automatically and should not be removed.
4. Click Save.

Prompt your staff member to set a password

1. For the account you just created, perform one of the following actions so your staff member can create a password:
   a. Click Set/reset in the Identity Management section if available, or
   b. Direct your staff to:
      1. Go to your library's WorldShare URL. Replace yourlibrary with your library's identifier: https://yourlibrary.share.worldcat.org/wms
      2. Click Set/reset password on the Sign In screen.
2. Either action will send a system-generated message to the email address in the account. Please note:
   ◦ Your staff member must follow the link in the system-generated email within 24 hours to set a password. They should check their junk folder if they do not see the email within a few minutes.
   ◦ If the link expires, you can perform either of the above steps to prompt your staff member again.

Note: Send your staff member their user name. Your staff member needs this information to create a password.

Search for users

1. On the left navigation, under User Management, select an index from the Limit search to list.
2. Enter your search terms. You must enter at least two characters for the search to return results.
3. Click Search or press <Enter>.
4. From the search results, click a user name to open the record.

Available search indexes - Table

<table>
<thead>
<tr>
<th>LIMIT</th>
<th>DESCRIPTION</th>
</tr>
</thead>
<tbody>
<tr>
<td>Name, ID, Email</td>
<td>Search terms entered for this index return results based on the following:</td>
</tr>
<tr>
<td></td>
<td>• Name: Last name, First name, Middle name, or preferred name</td>
</tr>
<tr>
<td>LIMIT</td>
<td>DESCRIPTION</td>
</tr>
<tr>
<td>---------------------</td>
<td>-------------------------------------------------------------------------------------------------------------------------------------------</td>
</tr>
<tr>
<td>Identifier (default)</td>
<td>The circulation barcode, ILL identifier, User ID at Source, and PPID</td>
</tr>
<tr>
<td>Name</td>
<td>Contents of the First Name, Middle Name, or Last Name</td>
</tr>
<tr>
<td>Barcode</td>
<td>Barcode (ID number) of the user.</td>
</tr>
<tr>
<td>User ID at Source</td>
<td>The ID of the patron in an external system (e.g. ILS, PeopleSoft, Banner, CAS)</td>
</tr>
<tr>
<td>ILL Identifier</td>
<td>A unique identifier for the user in the Tipasa system. It may be the user's library barcode</td>
</tr>
<tr>
<td>Email Address</td>
<td>Email address of the user</td>
</tr>
<tr>
<td>Phone Number</td>
<td>Phone number of the user</td>
</tr>
<tr>
<td>Street Address</td>
<td>Address of the user (e.g. house number, street name)</td>
</tr>
<tr>
<td>City</td>
<td>City of the user's address</td>
</tr>
<tr>
<td>State/Province</td>
<td>State or province of the user's address</td>
</tr>
</tbody>
</table>

- **ID**: Barcode, User ID at Source, ILL Identifier, or PPID
- **Email Address**: Email address located in the Library Record area of the Basic User Data accordion for the user

Values searched upon for the name and email address in the **Name, ID, Email** index may generate slightly different results than the individual **Name** and **Email** index.

- The **Name, ID, Email** index takes a single token from the user input and compares with a left-handed match of a searchable value
  - Example: 'smith'
- The individual **Name** and **Email** index searches allow multiple tokens to be passed, separated by spaces.
  - Example: "smith john"
<table>
<thead>
<tr>
<th>LIMIT</th>
<th>DESCRIPTION</th>
</tr>
</thead>
<tbody>
<tr>
<td>Postal Code</td>
<td>Postal code (e.g. zip code) of the user's address</td>
</tr>
<tr>
<td></td>
<td>Note: This option is only available if you are part of a WMS group.</td>
</tr>
<tr>
<td>Search all institutions in your group</td>
<td>Deselect the check box to search for users from your institution. When the check box is selected, users across all institutions in your group will be shown.</td>
</tr>
<tr>
<td></td>
<td>You cannot edit users that are not from your institution.</td>
</tr>
</tbody>
</table>

**Edit users**

1. Search for the user you want to edit
2. On the search results page, click the user's **Name**.
3. On the accordion of the section you want to edit, click **Edit** (on the far right).
4. Edit information, as appropriate.
5. Click **Save**.

**Delete users**

Deleting a user removes their account from the system. This action should be performed with caution. It cannot be undone.

Note: If you are part of a WMS group, you can only delete users from your institution.

If you use WorldShare Circulation, accounts cannot be deleted if the user has:

- Outstanding checkouts
- Outstanding bills
- Been sent to a collection agency

If you try to delete a user account that cannot be deleted, you will receive a message explaining why the user could not be deleted.

1. Search for the user you want to delete.
2. In the user account, click **Delete User Record**.
3. In the Delete User window, click **Delete**.
4. The Delete User Record window appears and the system confirms the deletion.
5. If you use WorldShare Circulation, all outstanding hold requests or item schedules associated with the user
account will be removed. Any reference to the user in item statistics will display as 'Unknown Patron.'