New OpenAthens Instructions for local administrators

Contents

Logging in

1. Go to https://admin.openathens.net/   or Click   OpenAthens - Login

2. Log in using your administrator username and password to open your dashboard
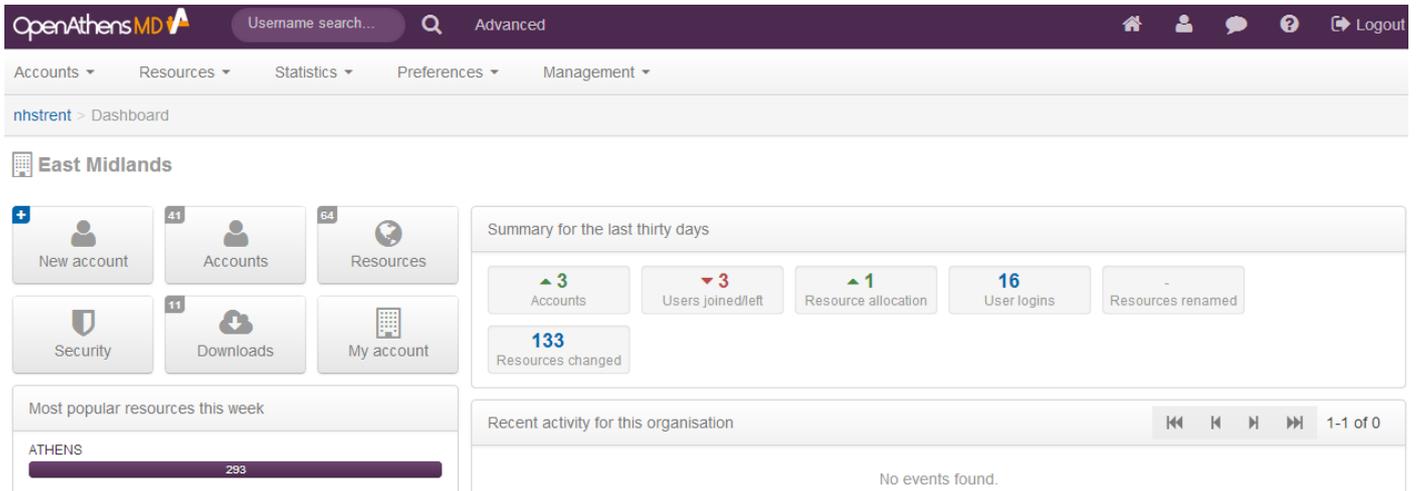
Regular tasks

There are certain tasks which need to be performed on a regular basis for all of the accounts that you administer
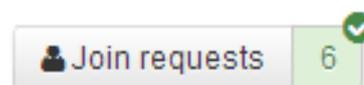
These are:

1. Join requests
2. Checking accounts created
3. Check who has joined your organisation

Join requests

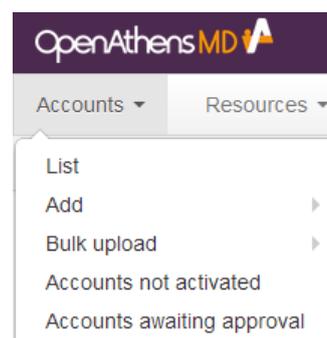- Go to the Open Athens dashboard

EITHER

- Click Join requests on right of screen

OR

- Click Accounts/Accounts awaiting approval

Doing either of these will take you to the same information

The join requests need to be assessed and the correct action taken.

Refer to the PROCEDURES on page 5 for further instruction on how to carry out these actions

- Move to another administrator
- Approve
- Reject and delete
- Send an email query to user

Accounts created/ Users joined

You need to check that users who have created accounts or joined your organisation have not been allowed through when they are ineligible or have registered under the wrong administration.

There are 2 ways to do this, choose whichever suits you best

Method A

Accounts created

- Go to the Open Athens dashboard /Advanced search tab at the top of the page
- Conduct a search as in the screenshot where creation date is the last week or period for checking

Users joined

- Go to the Open Athens dashboard
- From the dashboard click users joined

Check the accounts to see if any actions are needed. Refer to the PROCEDURES on page 5 for further instruction on how to carry out these actions

- Move to another administrator
- Leave as they are
- Reject and delete
- Send an email query to user

Method B

- Go to the Open Athens dashboard
- From the dashboard click statistics/auditing

- Specify a date range to search
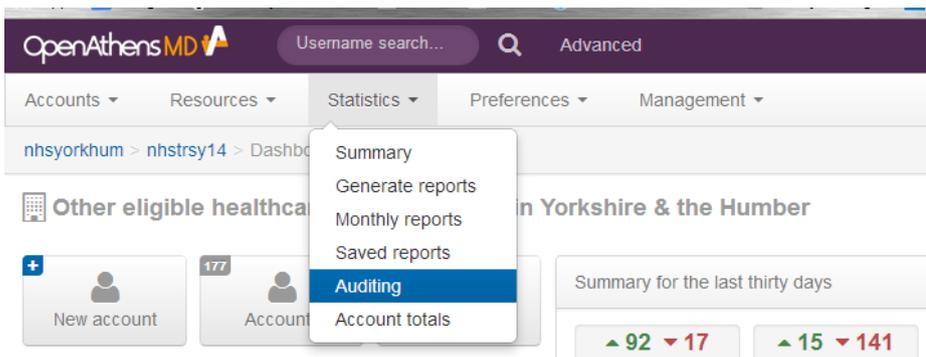- Click Account created or Joined organisation

Check the accounts to see if any actions are needed. . Refer to the PROCEDURES on page 5 for further instruction on how to carry out these actions
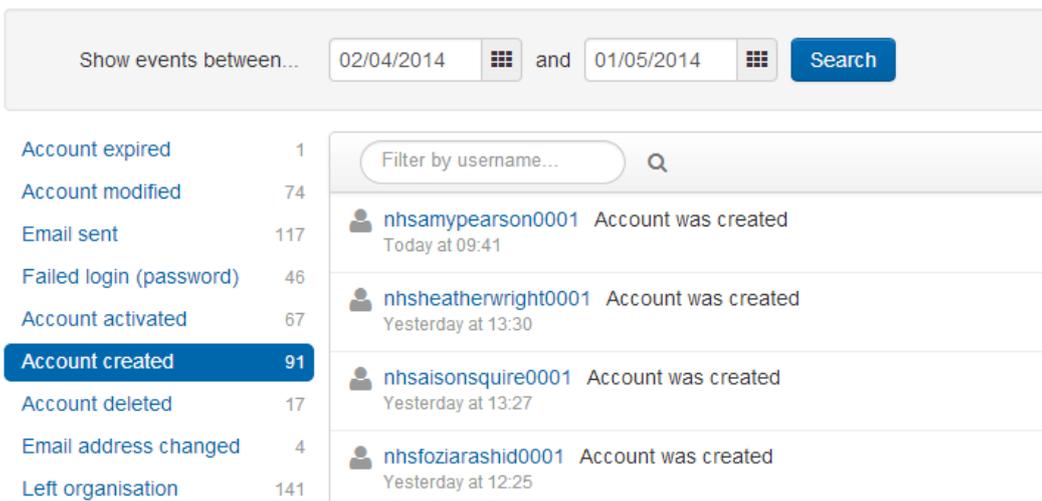
- Move to another administrator
- Leave as they are
- Reject and delete
- Send an email query to user

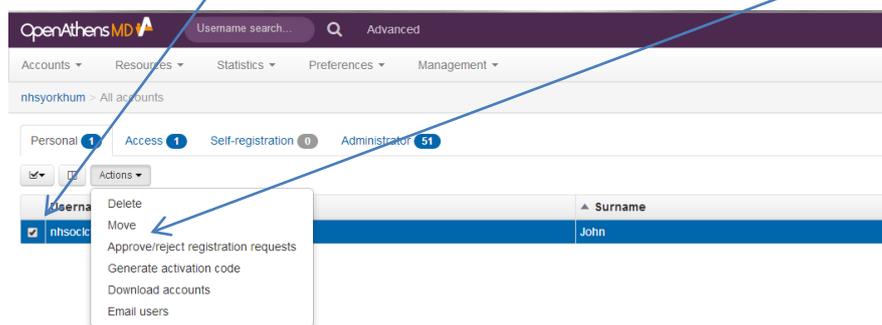## **PROCEDURES**

Move to another administrator

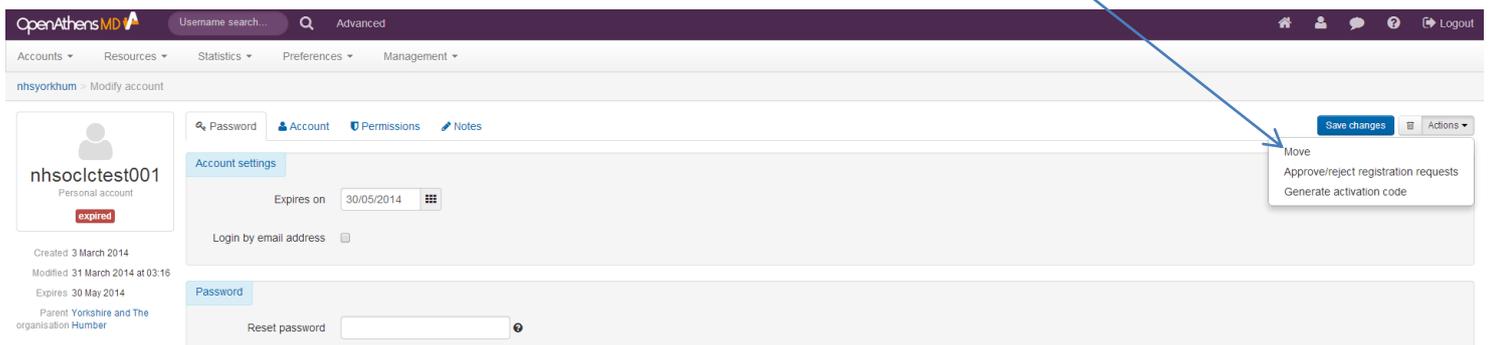 From your list of users:

EITHER

- Tick in the box next to the user name

- Click the down arrow next to actions, choose move

OR

- Right click on a username to open tab in a new window

- Go to the account and click the down arrow next to actions, choose move

You can then select or type an organisation name and click confirm move
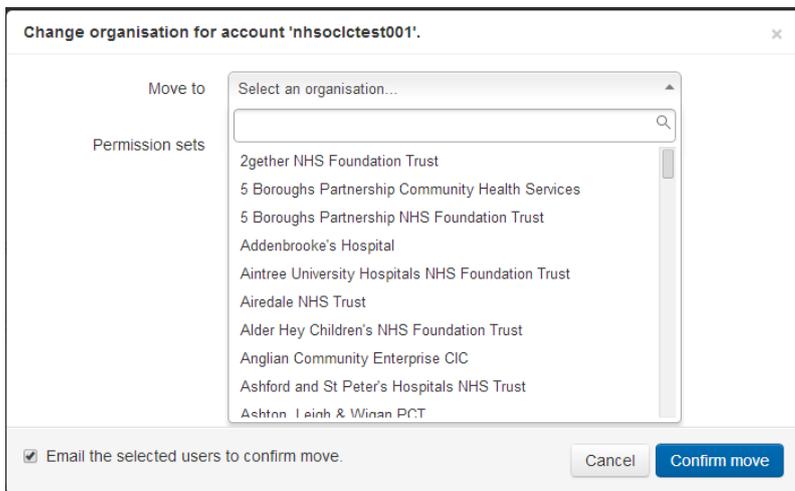
Approve an account

From your list of users:

- Right click on a username to open tab in a new window

- Check they are eligible by looking at details on the account tab

- Click the down arrow next to actions on the right of the screen. Choose Approve/reject registration requests

- Click Approve. An email will be sent to the user **unless you untick the box.**

You have selected 1 accounts.   ✕
Please choose whether to approve or reject the request for these accounts to join
this organisation.

◉ Approve
○ Reject

☑ Email the selected users to confirm approval.   [Cancel]   [✔ Approve]

Reject an account

- Follow the same procedure as above but click Reject

- Enter a standard reason or your own text

- An email will be sent to the user **unless you untick the box**

You have selected 1 accounts.   ✕
Please choose whether to approve or reject the request for these accounts to join
this organisation.

○ Approve
◉ Reject

Select a [standard reason ▼] or enter a reason below

Enter re	use of personal email
	not based in England
	not eligible in general

☑ Email the selected users with reason for rejection.   [Cancel]   [✖ Reject]

Delete an account

From a list of users or from a search for a single user

EITHER

•   Tick in the box next to the user name

•   Click the down arrow next to actions, click delete
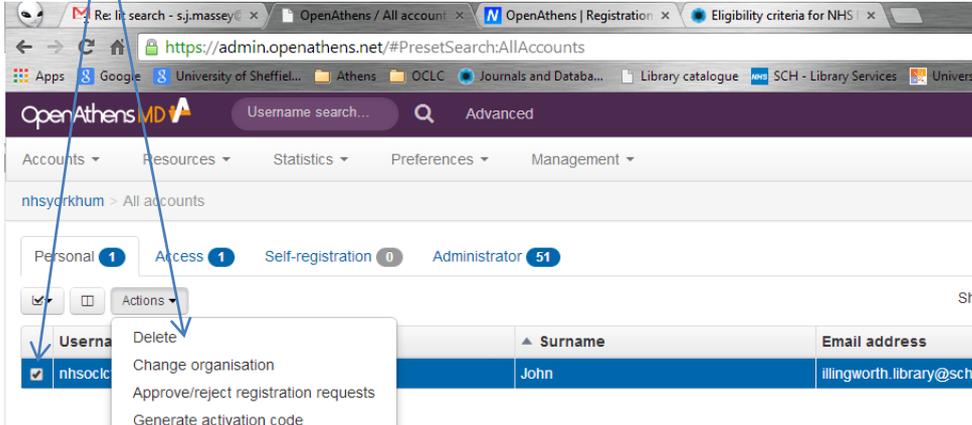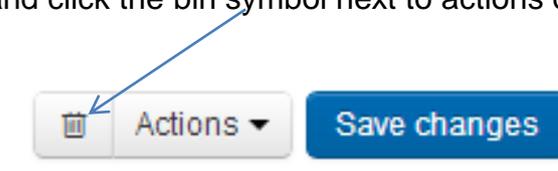

OR

•   Right click on a username to open tab in a new window

•   Go to the account and click the bin symbol next to actions on the right of the screen

Not Activated accounts - YOU DO NOT NEED TO REGULARLY DO ANYTHING WITH THESE

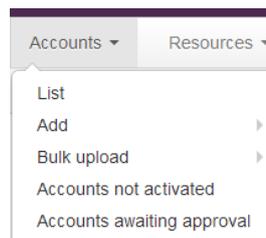To find Not activated accounts

EITHER

• Click Not activated on right of screen

OR

• Click Accounts/Accounts not activated

Not activated accounts are set to delete after a period of time according to your account preferences. If a not activated account is activated it becomes a join request and is dealt with by that process

Ineligible accounts

An account is ineligible if:

- It has reached the end of its 2 year life or contract termination date

- It has just been registered and is awaiting approval as a join request

- It has been rejected

- It has moved to another organisation, does not meet the eligibility criteria and is awaiting approval as a join request

- It is a renewal that has not been automatically renewed and is awaiting approval as a join request

Searching ineligible accounts - YOU DO NOT NEED TO DO THESE SEARCHES ON A REGULAR BASIS

If you do a search using the criteria in the screenshot below, you will retrieve accounts that are ineligible because they are join requests or people who have submitted a renewal but are not automatically eligible for an account. These accounts will become eligible when the join requests have been approved.

If you do a search using the criteria in the screenshot below, you will retrieve accounts that are ineligible because they have come to the end of their 2 year life or the contract termination date has been reached or they have been rejected . These accounts will automatically be deleted when the account expiry date is reached (30 days if that is what your preference has been set to)


OpenAthens Account Renewal Process

Accounts that are coming towards the end of their 2 year life or their contract termination date will enter the renewal cycle:

1) Users receive automated "Eligibility due to expire email" 4 weeks before account's eligibility date expires. Account holders can self-renew if use matching credentials. Renewals not meeting registered credentials will go to "Join Requests/Awaiting for approval" (see Procedures for further action)

2) The "Eligibility expired email" is received when the eligibility date expires. Again, the user is able to self-renew or if the credentials are not matched the account will go forward to "Join Requests/Awaiting for Approval" (see Procedures for further action)

3) 30 days before the account itself is due to expire the user receives the "Account expiring email", with the renewal instructions (see Procedures for further action))

4) Expired accounts deleted after period set in Default account creation preferences, eg 30 days.

NOTE If manually amending the expiry dates, ensure that the account expiry date is set 31 days after the eligibility expiry date

Searching for incorrectly registered accounts

With the NHS IP address enabled nationally in the system, it is possible for applicants on NHS systems to register for any OpenAthens org id. Check notoficiations or retrieve accounts via the search below:
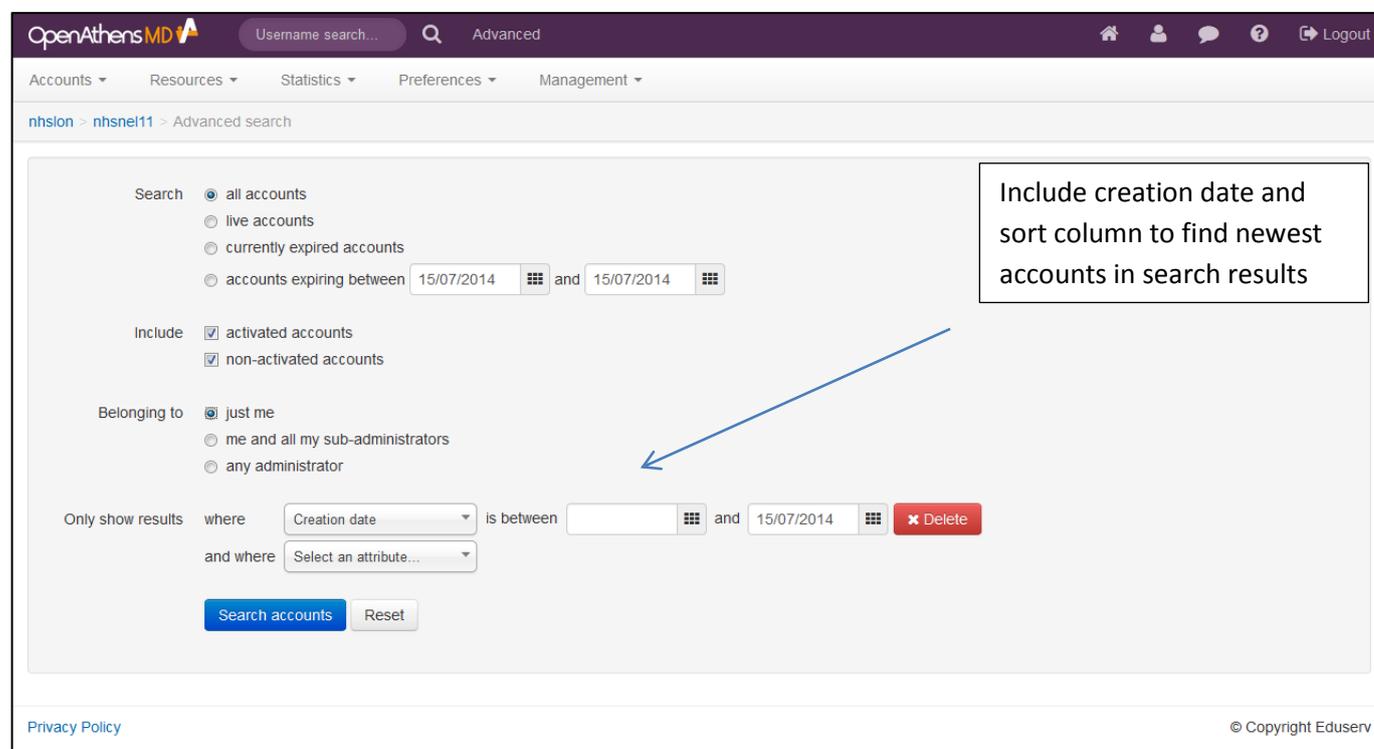
RESOURCE MANAGEMENT CENTRE

Resource Catalogue

Both OpenAthens enabled and allocated resources can be found in the Resource catalogue. To allocate a resource for which you have a subscription to go to Resources and Resource Catalogue:
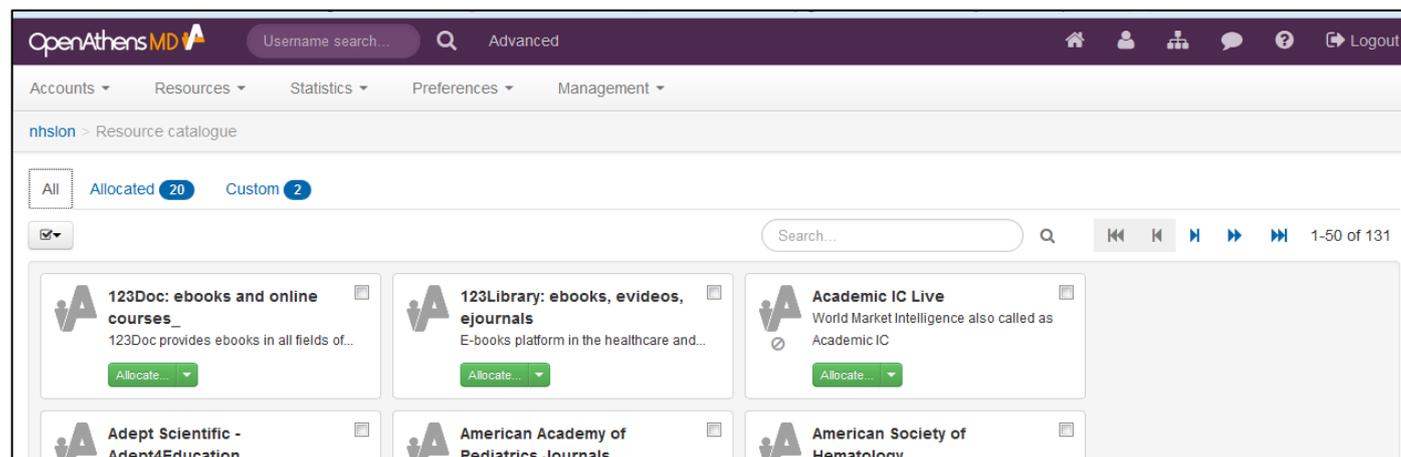
1) The All tab lists all the potential OpenAthens resources
2) The Allocated tab list the resources allocated to permission set(s)
3) The Custom tab allows administrators to enter own resources

To allocate a resource, go to the All tab and find the resource. Click on the Green Allocate button to add it to permission set(s). If allocating more than one resource, select resources and go to Action button
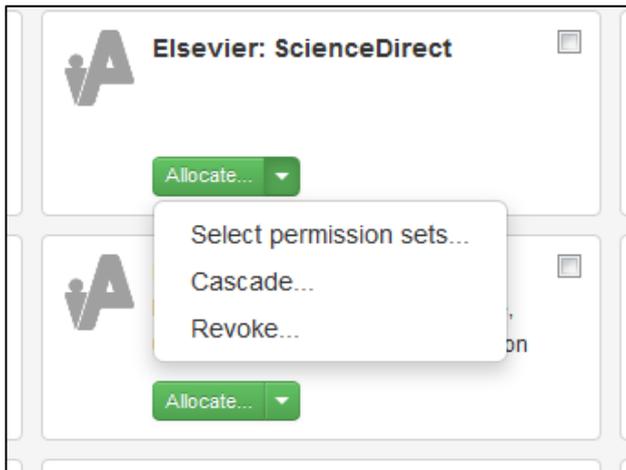
Permission Sets

The list of existing permission sets can be found by going to Resources and Permission sets
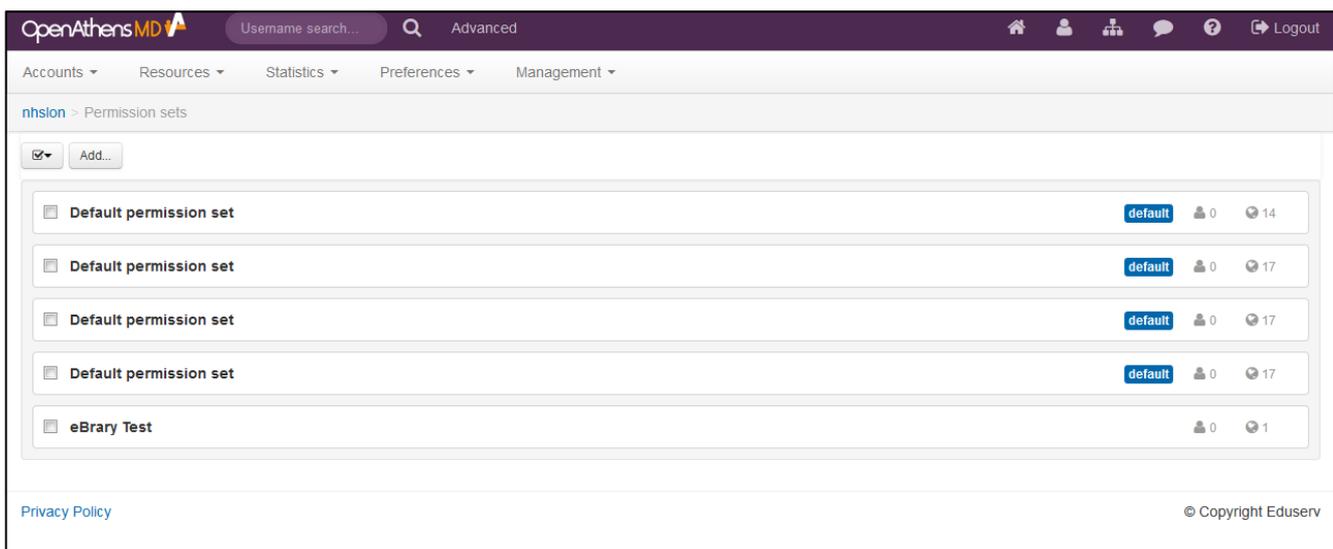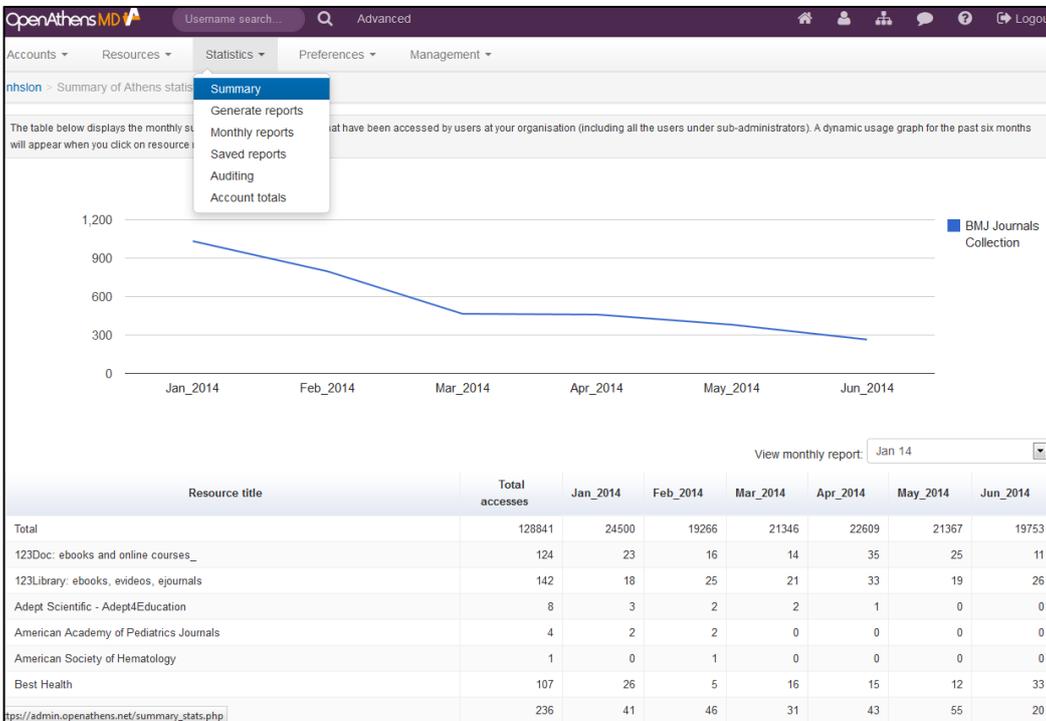

To check and modify resource allocation click on the button indicating the number of resources allocated to that permission set

Statistics

To view usage statistics for all resources accessed via OpenAthens go to the Statistics Menu. A summary of the previous 6 months' activity is available. Clicking on a resource name will display a graph:

To generate usage figures for a specific time span go to Generate Reports. If access figures are required for one resource, click on "Usage broken down by resource", and locate required resource usage figure(s)
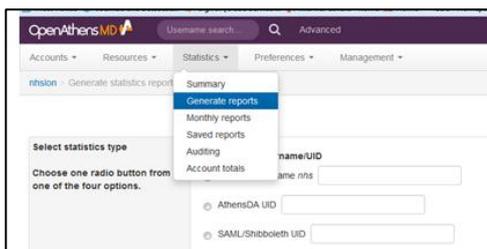
Some resources will have two usage figures, as suppliers use different methods of enabling OpenAthens. Where there is a Usage figure and a Transfer figure, please add together. For example:

BMJ Journals (transfer)	6,196
BMJ Journals Collection (usage)	3,402

Also, the resource usage figures will contain recorded logins against resources that are not in permission sets, which users have tried to access unsuccessfully: For example

British Standards Institution subscription services (transfer)	3
British Universities Film & Video Council (transfer)	1
British Universities Film & Video Council: BoB National (transfer)	1

To remove these types of transfers from the usage figures, go to Preferences and Accounts, and change the "Permission Sets" preference to "Restrictive"
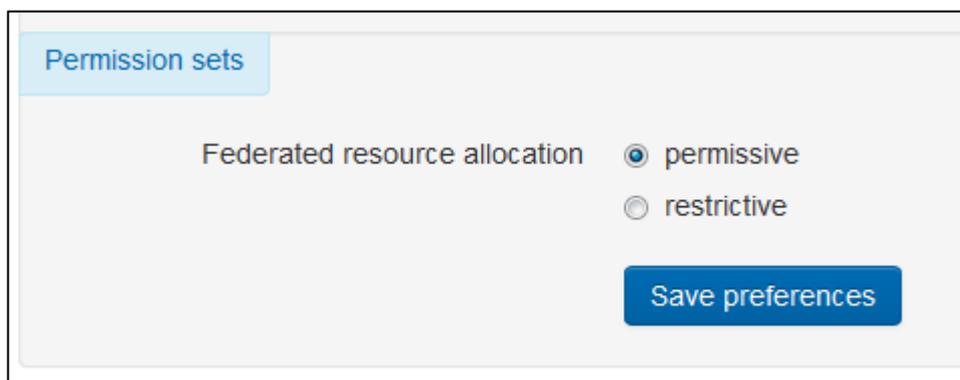
Permission sets

Federated resource allocation   ● permissive
                                  ○ restrictive

Save preferences