

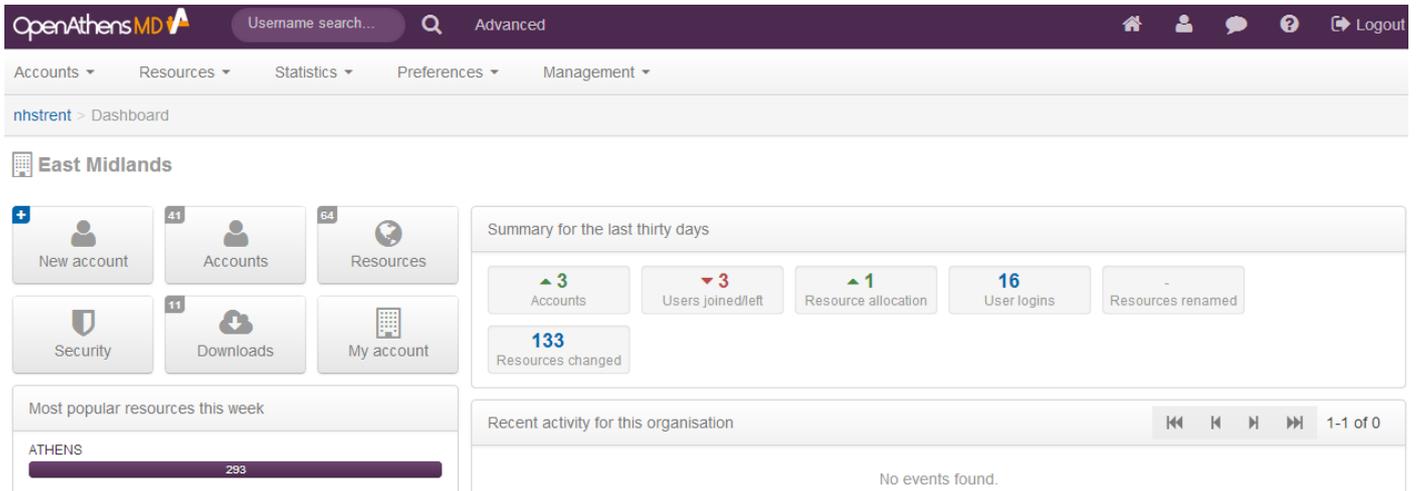
New OpenAthens Instructions for local administrators

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Logging in

1. Go to <https://admin.openathens.net/> or Click 
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:

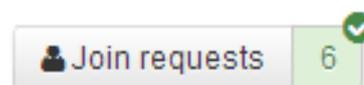
1. Join requests
2. Checking accounts created
3. Check who has joined your organisation

Join requests

- Go to the Open Athens dashboard

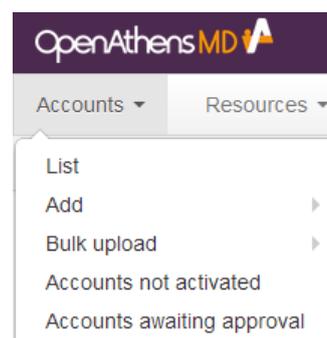
EITHER

- 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

The screenshot shows the search interface with the following settings:

- Search:** all accounts, live accounts, currently expired accounts, accounts expiring between 02/05/2014 and 02/05/2014.
- Include:** activated accounts, non-activated accounts.
- Belonging to:** just me, me and all my sub-administrators, any administrator.
- Only show results:** where is between and . There is a red **Delete** button next to the second date field.
- and where:**
- Buttons:** and .

Users joined

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

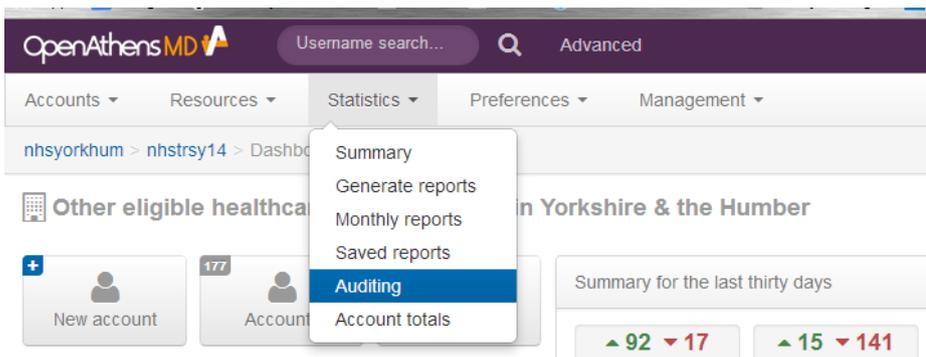


Check the accounts to see if any actions are needed. Refer to the PROCEDURES on page 5 for further instruction on how to carry out these actions

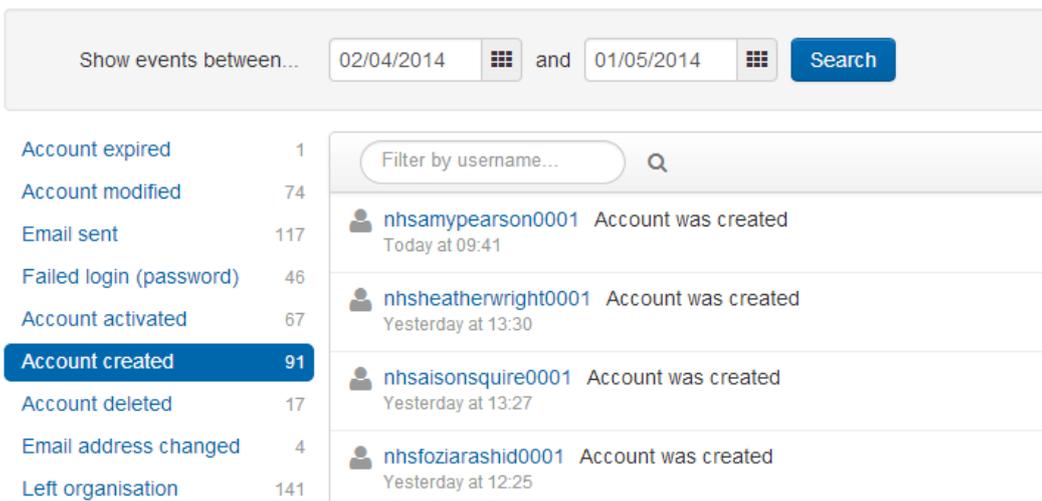
- Move to another administrator
- Leave as they are
- Reject and delete
- Send an email query to user

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



Logins	1	 nhssysmassey001 User joined this organisation. Previous organisation was: Shef 28 April 2014 at 12:40
Successful login	149	
Password changed	74	 nhsyhjcwaston001 User joined this organisation. Previous organisation was: Gps 28 April 2014 at 09:31
Transfers to federated re...	71	
Joined organisation	15	 nhsmaggiecurtin0001 User joined this organisation. Previous organisation was: O 24 April 2014 at 09:48
Transfers to resource	49	 nhs michaelgough0001 User joined this organisation. Previous organisation was: I 22 April 2014 at 13:42

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

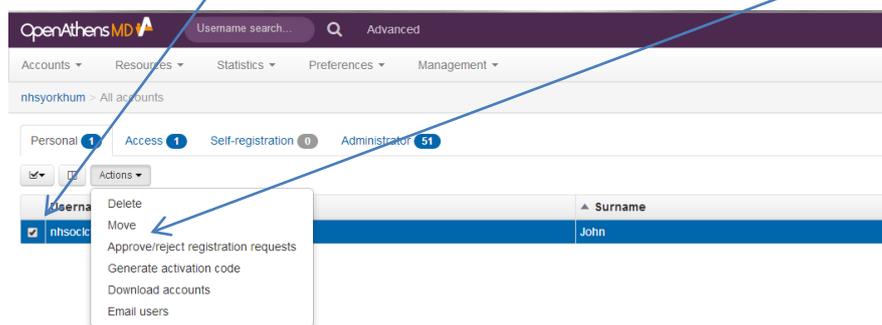
PROCEDURES

Move to another administrator

From your list of users:

EITHER

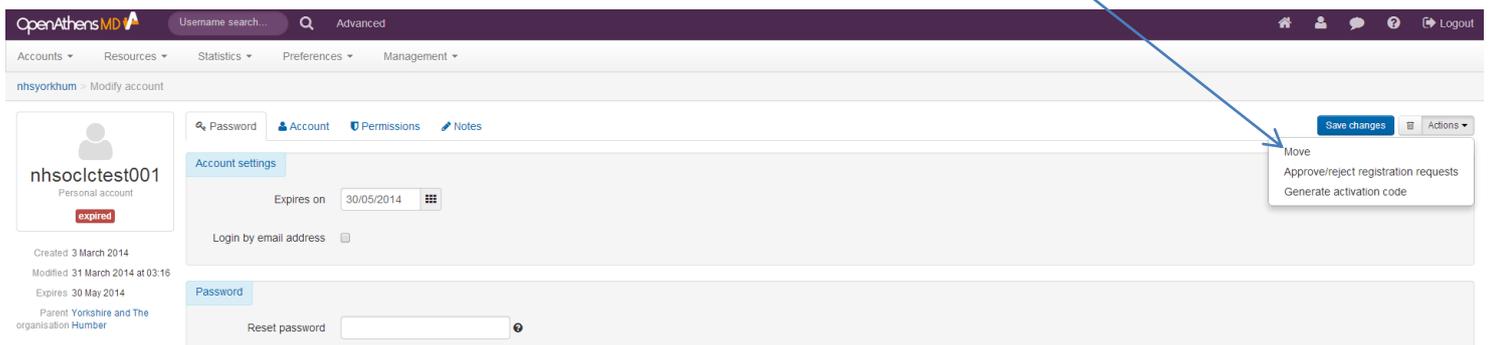
- Tick in the box next to the user name
- Click the down arrow next to actions, choose move



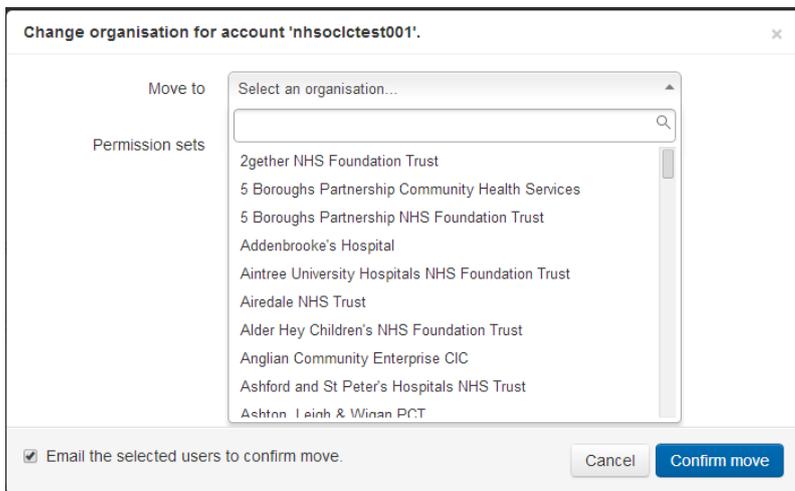
OR

- 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 reason

- use of personal email
- not based in England
- not eligible in general

Email the selected users with reason for rejection.

Cancel

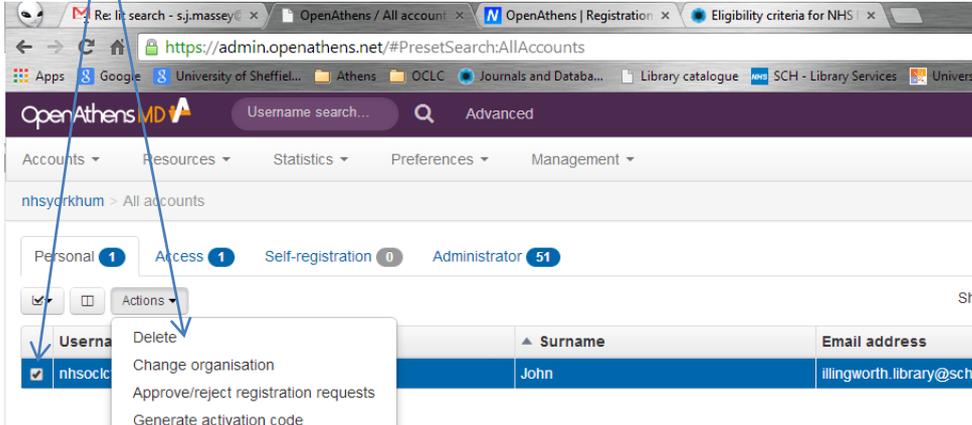
✕ Reject

Delete an account

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

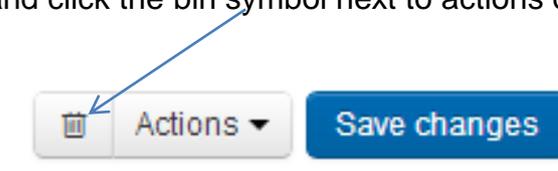
EITHER

- 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

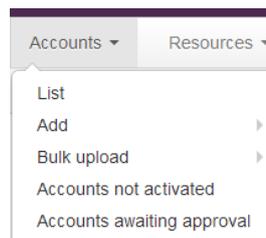
EITHER

- 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.

The screenshot shows a search interface with the following sections:

- Search:** Radio buttons for 'all accounts' (selected), 'live accounts', 'currently expired accounts', and 'accounts expiring between' with date pickers for '30/04/2014' and '30/04/2014'.
- Include:** Checkboxes for 'activated accounts' (checked) and 'non-activated accounts'.
- Belonging to:** Radio buttons for 'just me', 'me and all my sub-administrators' (selected), and 'any administrator'.
- Only show results:** A series of filters:
 - where Eligibility status is Ineligible (Delete)
 - and where Eligibility expiry date is between 01/05/2014 and [empty] (Delete)
 - and where Creation date is between [empty] and 01/04/2014 (Delete)
 - and where Select an attribute...
- Buttons:** 'Search accounts' and 'Reset'.

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)

Search all accounts
 live accounts
 currently expired accounts
 accounts expiring between 30/04/2014 and 30/04/2014

Include activated accounts
 non-activated accounts

Belonging to just me
 me and all my sub-administrators
 any administrator

Only show results where Eligibility status is Ineligible

and where Eligibility expiry date is between [] and 01/07/2014

and where Select an attribute...

[OpenAthens Account Renewal Process](#)

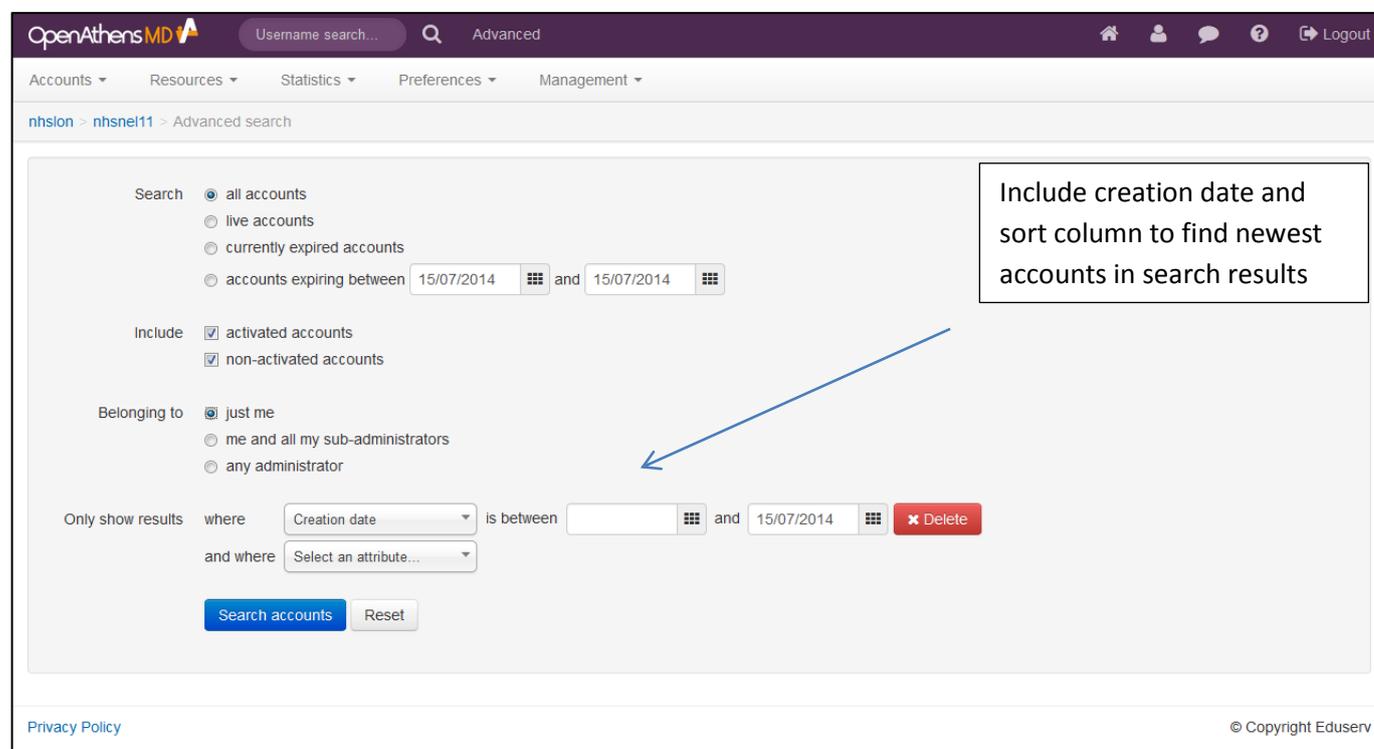
Accounts that are coming towards the end of their 2 year life or their contract termination date will enter the renewal cycle:

- 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 notifications or retrieve accounts via the search below:



The screenshot shows the OpenAthens MD interface with the following search criteria:

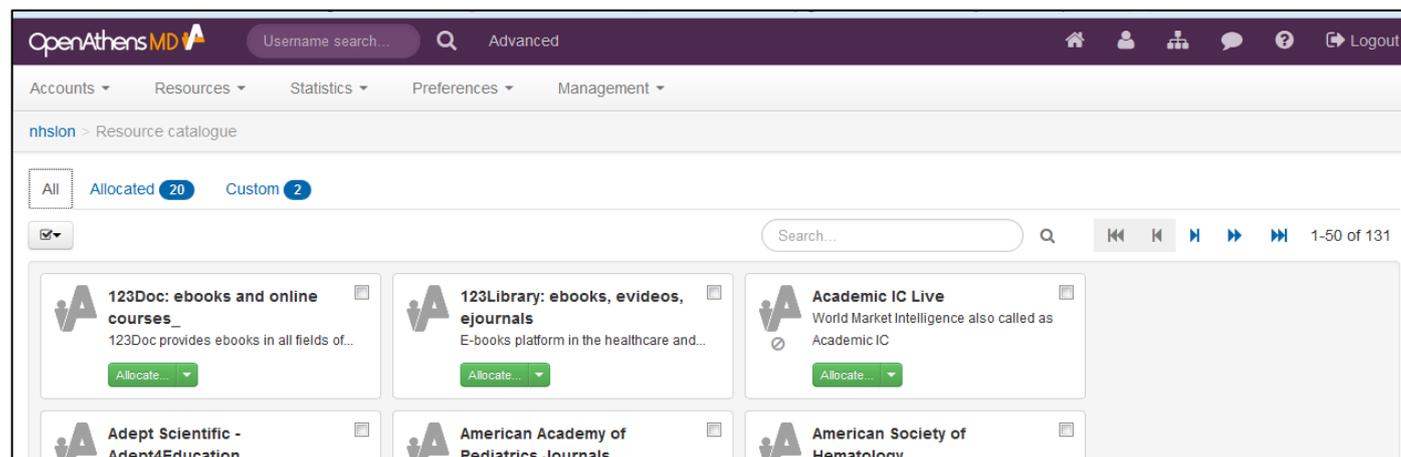
- Search: all accounts, live accounts, currently expired accounts, accounts expiring between 15/07/2014 and 15/07/2014
- Include: activated accounts, non-activated accounts
- Belonging to: just me, me and all my sub-administrators, any administrator
- Only show results where: Creation date is between [] and 15/07/2014

A callout box points to the search criteria, stating: "Include creation date and sort column to find newest accounts in search results".

[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:



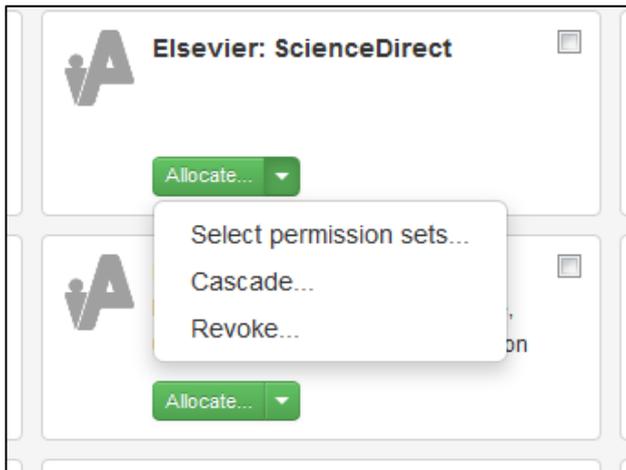
The screenshot shows the OpenAthens MD interface with the following resources listed in the Resource Catalogue:

- 123Doc: ebooks and online courses_
- 123Library: ebooks, evideos, ejournals
- Academic IC Live
- Adept Scientific - Adept4Education
- American Academy of Pediatrics Journals
- American Society of Hematology

Each resource has an "Allocate..." button.

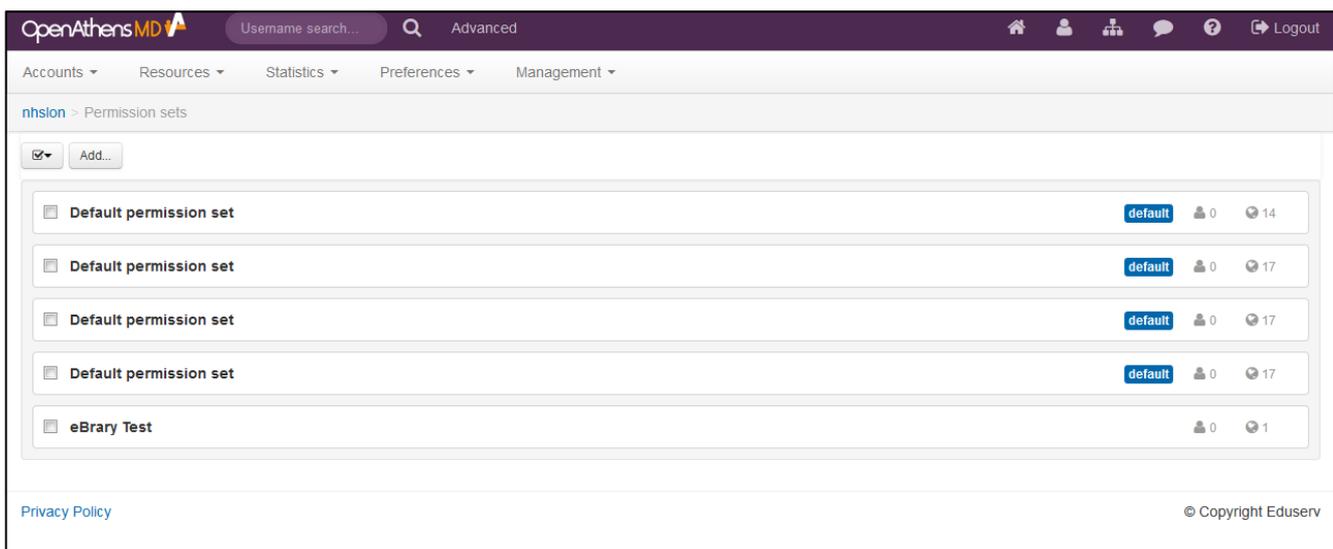
- 1) The All tab lists all the potential OpenAthens resources
- 2) The Allocated tab list the resources allocated to permission set(s)
- 3) The Custom tab allows administrators to enter own resources

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

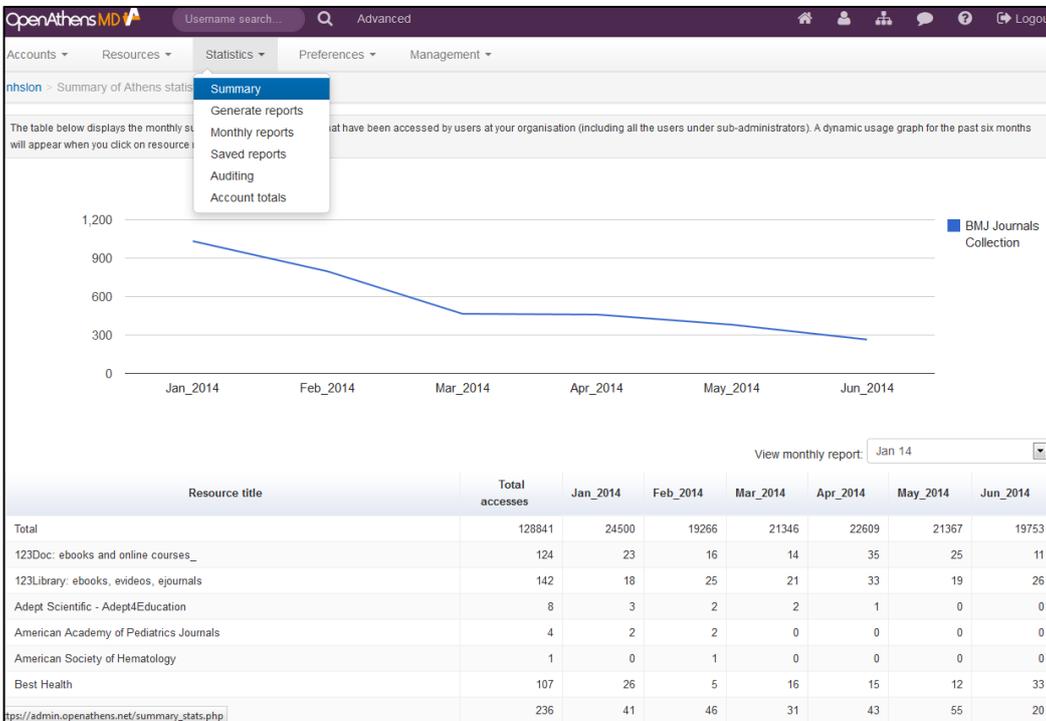


To check and modify resource allocation click on the button indicating the number of resources allocated to that permission set

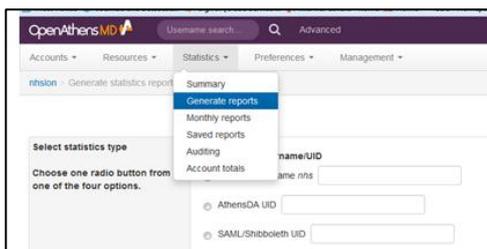


Statistics

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)



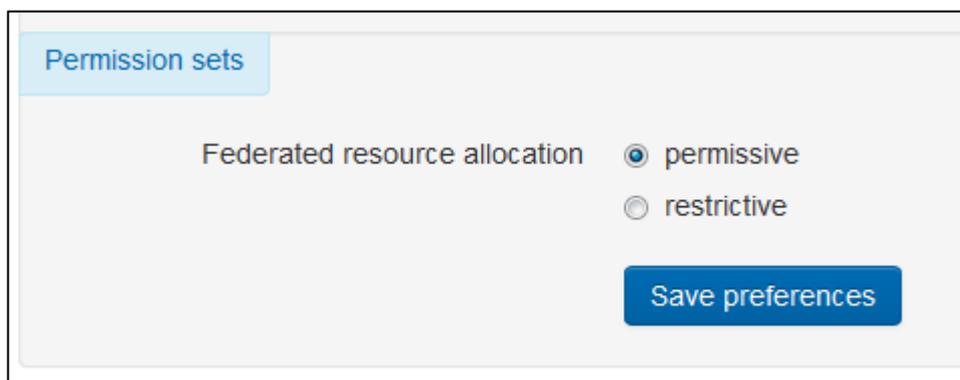
Some resources will have two usage figures, as suppliers use different methods of enabling OpenAthens. Where there is a Usage figure and a Transfer figure, please add together. For example:

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