HEI NHS OpenAthens Administrators:
The UHMLG "how to" guide
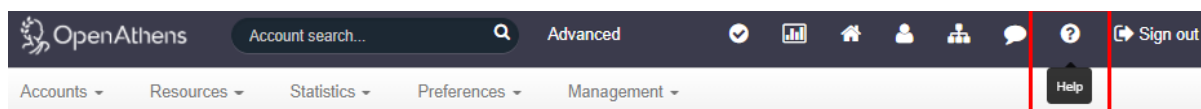
UH+MLG

UNIVERSITY HEALTH & MEDICAL
LIBRARIANS GROUP

Contents

Correct as of August 2023

Introduction

All the information in this guide, and *much more*, is available in the help section of your NHS OpenAthens administration site.

How to get your HEI set up with an NHS OpenAthens organisation

Use the form at www.uhmlg.org - under "NHS OpenAthens"

Please include the following information

- Name of the HEI
- Name of key contact / NHS OpenATHENS administration lead
    o Plus email address to be set up as the first administrator
- Contact email (ideally a shared inbox)
    o This will be used by students if they've got questions
- Postal address for the Library
- Library website URL
- Trusted email domain(s) for students
- Whether you are happy for your name and email address to be available openly on our website as a contact for your organisation
-

Getting started

https://admin.openathens.net/
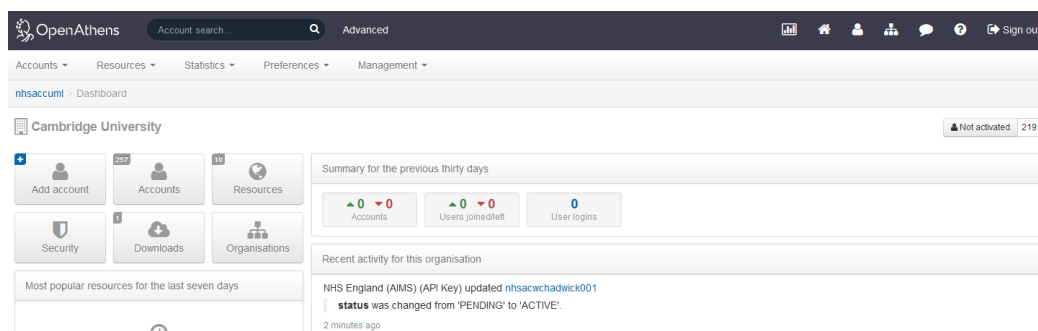
Login with your username (nhs….) and password.

An authentication code will be sent to the email address that was registered with the account (ideally a group email).

Add the authentication code and login, to land on the homepage, with dashboard.

Additional OpenAthens Administrators

There are a number of advantages to this change:

- We know that many NHS/HEI organisations share the admin work between several colleagues. Up until now, this has meant having to share usernames and passwords, which isn't ideal practice. This change means that every colleague who carries out OpenAthens admin work can have their own login.

- With the two-step authentication system, access codes are sent to the email address specified in the admin account – this can cause problems when sharing admin details, as getting hold of those access codes can be more difficult. If each administrator has their own account, the access codes go directly to that person's email.

- When sharing the admin account, it's difficult to see who has done what, as all activity within the system is recorded against just one username. With individual admin accounts, the audit trail becomes clearer, meaning that issues or queries can be solved more quickly.

How to set yourselves up:

1. You will need to create a new personal OpenAthens account under your organisation to use as your administrator account. You should be able to do this within your own admin area, and can choose your own username (eg fwilkieadmin). This personal admin account will not allow you to access resources, it is purely for accessing the admin website.

2. Login to the admin website with your current existing OA admin account

   o Click on **Preferences,** then **Organisation**

   o Click on the **Administrators** tab

   o Use the search box to search for your new personal admin account and click on it to add it to the list of administrators

   o Click on the **Add Role** button for your account

   o Select **Organisation administrator,** then click on the **Add** button

   o You will then see **Admin** displaying with your name

   o Click on the **Save changes** button at the top right hand corner, enter your current admin account password, and wait for the green box confirming that the changes have been saved.

3. You can then log out of your existing admin account, and log back in with your personal account. You should now be able to do all the same things in the admin site, under your own personal account login.

You can follow the same process for any colleagues within your organisation that you share the admin work with.

Please note: administrators can use the same email address for each of their accounts, if they also have a personal account for accessing resources. When setting new accounts up, you should leave the "login by email address" box unchecked, so that you don't get a message saying that the email address is already in use. You will then need to login with the username for these accounts (you won't be able to login using your email address).

Removing administrator rights from an OpenAthens account

If you have an administrator account, you can remove admin rights from other people's accounts – for instance, if colleagues change roles, or leave their job, or if admin rights are assigned by mistake.

- Click on **Preferences,** then **Organisation**
- Click on the **Administrators** tab
- Find the account listed
- Click on the cross next to the word Admin
- Click on the **Save Changes** button and enter your password.

Other things to note

- At no point should anyone be assigned as an **Owner** – we only have one owner for the entire NHS structure, and this sits with NICE.

- Administrator email addresses can be different from the public contact details for the organisation.

- OpenAthens have created demo videos which show you how to assign an administrator role to accounts: https://www.youtube.com/watch?v=NA2-ztQWxAw.

- OpenAthens have also created a frequently asked questions page: https://openathens.org/multiple-administrator-faqs/.

How to add accounts – bulk upload

This will be the easiest way of importing a set of students in a whole year group.
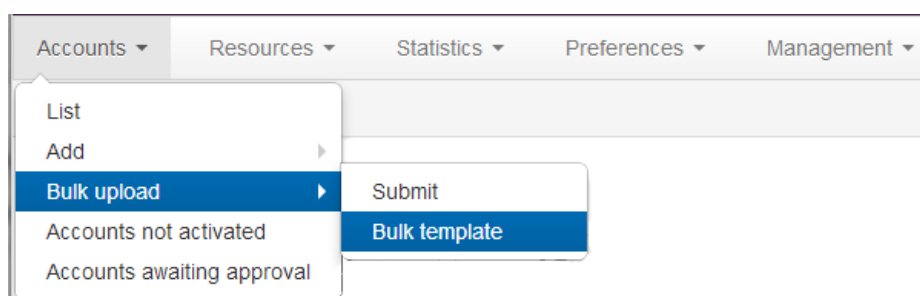
NB – this is a quick, shortened version of the full instructions available in the Help feature of the dashboard.

The minimum information for your student group are:

- First name
- Last name
- Email
- Course end date (YY-MM-DD)

Bulk template

Path to function: **Accounts > Bulk upload > Bulk template**

This option downloads an XLSX file (Excel and others) tailored for working with your accounts' attributes. Mandatory fields are colour coded and there is also some information about each column in the notes that you can read if you hover over a column heading.
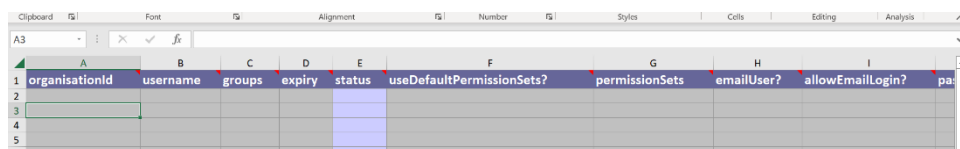

Where a field has restricted values (such as a list of roles or departments) there is a drop-down list in the cell. This will only stop you typing or pasting values into the restricted cells if the values you are entering are invalid, so there is no problem with pasting in lists of data (as long as the values are valid).

Apart from adding the personal data of the students (names, email, date), the minimum fields that you should populate are:

Column	Header	Recommended answer either using drop-down choices, or entering data
D	Expiry	course end date + 2 months (yyyy-mm-dd)
E	Status	"pending"
F	Use default permission sets	"true"
H	EmailUser?	"true"
I	Allow Email Login	"false"

V	Attribute/Job Role	"students -placement"
W	attribute/eligibility Status	"eligible"
X	attribute/eligibility Expiry	course end date (yyyy-mm-dd)
Y	attribute/contact Approval	"true"
Z	attribute/terms Accepted	"true"
AA	attribute/contract Type	"temporary"

TIP: before you add the personal data for the students, if you enter the data for the first row, you can copy/paste the data across all the necessary rows to save time.
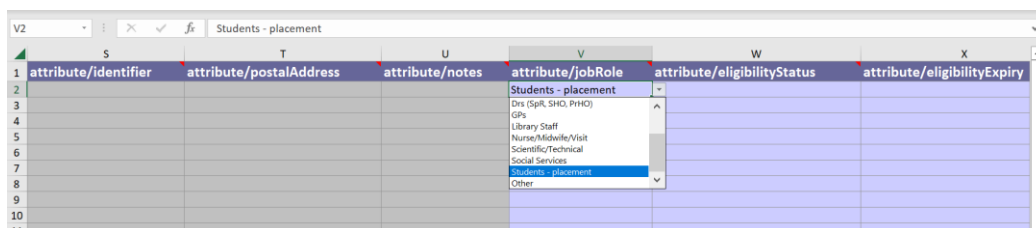
When you're ready to upload the file, you need to **save it as CSV format** as all others will be rejected.

Submit bulk upload

Path to function: ***Accounts > Bulk upload > Submit***

The upload wizard has three pages.

1. On the first page you select the type of operation you want to perform - adding, modifying or deleting personal accounts.
2. On the second page you select the CSV file from your computer that you want to upload.
3. The final page after you click submit upload will either show details of where your file failed basic validation tests, or a message saying the file has been accepted and is being processed.

The basic validation looks first at whether any mandatory columns are missing and reports those before looking at anything else. If no mandatory columns are missing it looks at whether items are too long or short for that field, missing data, and items in the wrong format. A really cool feature here is that you can stay on that page, edit and resave your file to fix the identified problems, and then simply hit submit again to proceed.

NB – experience shows that reasons for errors can sometimes seem a bit opaque. Sometimes it's necessary to save a file and upload a few times before (magically) it seems to work. This glitch is known about by OpenAthens.

... or
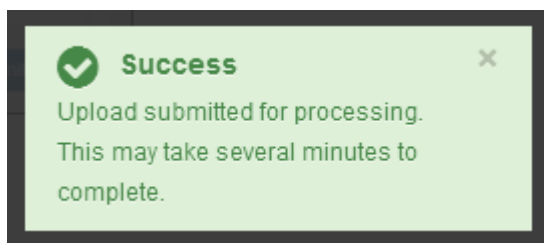
The submitted for processing message does not necessarily mean that your upload is successful though, only that it passes the basic validation checks. There may still be errors that can only be discovered when the file is processed - e.g. trying to modify an account that does not exist, or create an account with a username that already does. If there are failures at this point then three things will happen:

- Any lines that have no errors are processed
- Any lines that have errors are reported:
  - An email is sent listing the errors
  - A message is available briefly in the interface that you can click on and view the errors
- Any lines that have errors are collected into a new file that is put in your downloads area for you to open, correct and re-upload.

Anything to watch out for?
- To avoid problems with how different countries format dates, upload and download files always use yyyy-mm-dd.

Final stage

If you have set all your students as "pending" do remember to approve all your new registrations:
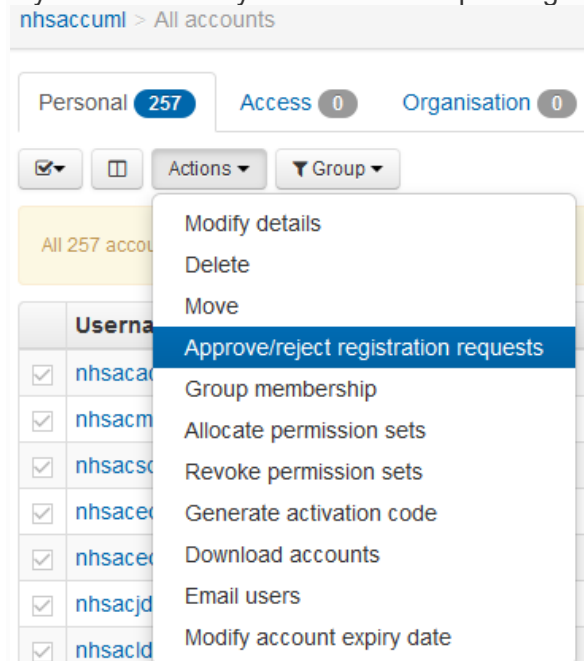
You may want to email all of the students to confirm they've got an OpenAthens account, or you may prefer not to – the choice is yours.
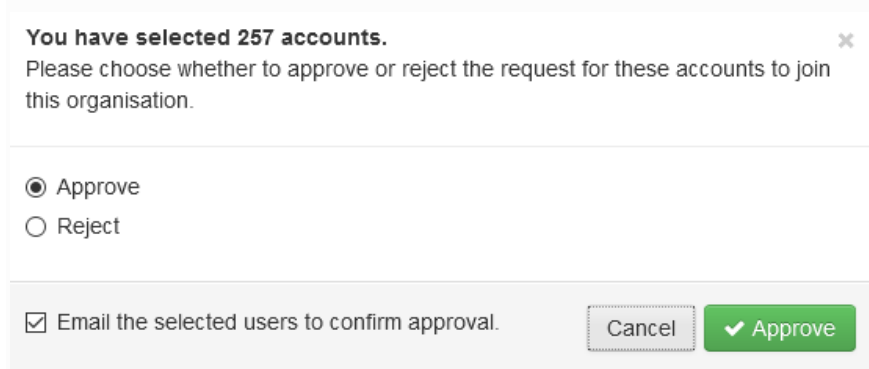
How to add accounts – personal account

You can add individual accounts manually.

Path to function: ***Accounts > Add > Personal account***

Login

- set the *username* (always prefixed by nhs by default) and whether they can log in via email address (not recommended)
- Usernames must be unique. They include the prefix in the grey box - e.g. nhsilk21. A very common name may require a number – e.g. nhstjones3
- pick *email the user an activation code* (recommended) or specify a password for them (e.g. if you are creating a test account for yourself).

Details

Enter the user's details - all the fields on this tab must be completed. Depending on your schema you may see more mandatory fields here than first name(s), last name and email address. Checkboxes will appear here if they are marked as mandatory, but do not have to be ticked.

If you get a warning that the email address is in use then you can use search to find it (if you don't immediately see it in the results, check the deleted tab)

Optional details

These include non-mandatory fields. By default these are items such as group, title, phone number and department but your view may be different if you have custom schema fields.

Featured here is the group selector. If you have many groups, the search will reduce the list as you type. You can also create a new group if what you enter is not already in the list.

Permissions

Which permission sets should be assigned to the account. Default permission sets are already selected. Clicking on the permission set description will open that permission set.

Create

Once you have completed all pages you can click the button to create the account. Assuming you left the activation option unchanged, the user will now be sent an email with instructions using your template.

How to add accounts – self-registration

You can also offer to have your students self-register, but you will need to approve each registration as it comes through (and reject registrations from non-eligible students).

You will need to add your HEI name as an organisation alias in the Preferences > Organisation page within the OA admin system in order for students to be able to select it on the registration page.

Direct your students to https://openathens.nice.org.uk/ and encourage them to enter your HEI name under organization.

Path to function: **Accounts > Accounts awaiting approval**

For one or more accounts

Select accounts with the checkboxes and choose the approve/reject users item on the Actions button. If rejecting accounts, you will need to say why.

How to organize your students: Groups

When you bulk upload students, organizing them into year groups (or any other sort of group) might be useful.

You'll be able to do mass modifications to any account in a group – eg you may wish to extend the expiry date of a year group of students.

- Bulk upload your students
- Use the **advanced** search to identify all the students added on a particular date.
  Tip: make sure you include non-activated accounts, as well as activated one.

- Select all, and use the Actions button – pick "group membership"
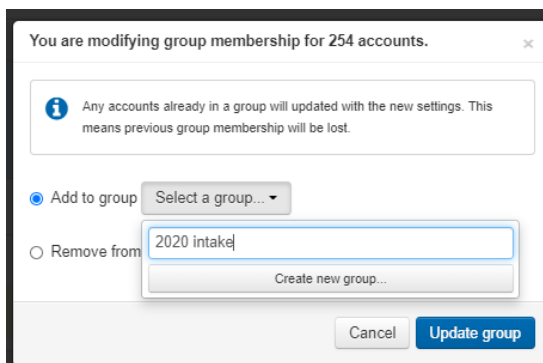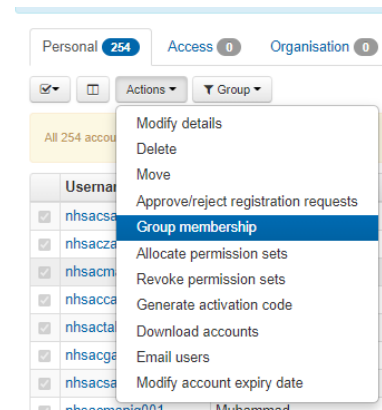
-
  "select a group", and type in the name of the group you wish to create.
- Update group.

You can remove accounts from the group easily too.

How to customize the standard messages

Various events trigger an email to your users such as their account being created, or nearing its expiry date. These emails use templates which you can customise, and if you have sub-organisations you have the option to set different messages for those sub-organisations.

The following uses the account created (activation) template as reference, but all templates work in the same way.

Path to function: ***Preferences > Email***

Editing the text

Default text is provided and this is often a good starting point as it will have all the key fields for things like username and activation link already inserted.

Modify the text as you see fit and click the Save changes button. It uses a rich text editor, so you have options for style and layout as well as wording. There are no options for fonts other than size as the choice of font should be left up to the person reading the email.

A revert button becomes available next to save when making changes that will take you back to the default message if you need a fresh start. If you are a sub-administrator, this default may be one set by a higher level administrator.

Including fields

Similar to mail-merging, there are various fields you can include in the template such as username or the account's expiry date. There is a button to insert them in the rich text editor next to the hyperlink buttons.
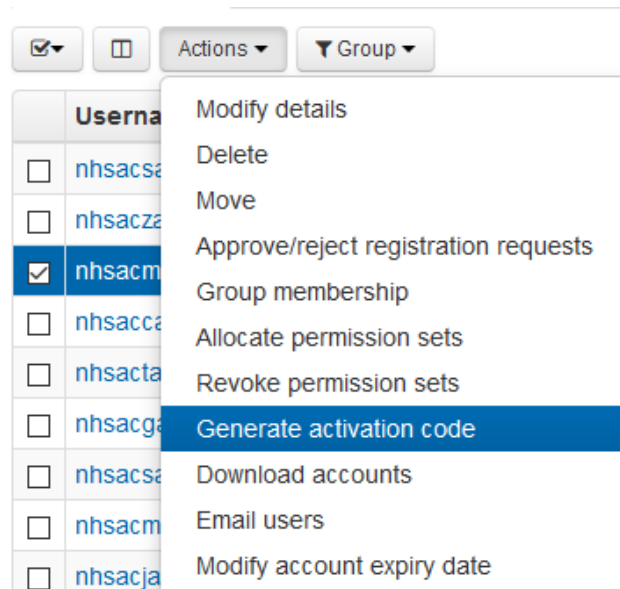

Fields can also be included in the subject line or reply-to address, but since the button can only work with the rich text editor below you need to type or paste in the appropriate field code.
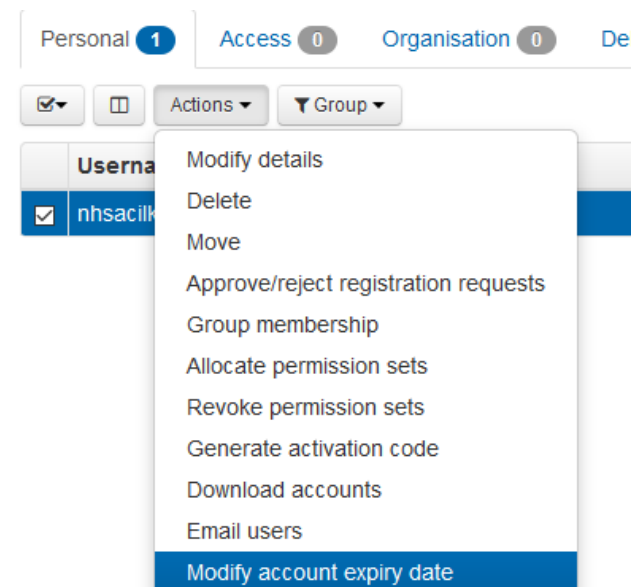
Actions

How to reset a password

Select the student account, and use "actions" to generate an activation code.

How to extend a student's expiry dates

Select the student account, and use "actions" to modify account expiry date.

More sources of help and support

Join the email list LIS-UHMLG-OPENATHENS@jiscmail.ac.uk via this link.

Use this list to raise any issues with resources, and to hear about any known issues.