User Profiles and Organisations

Introduction

This guide describes:

- For all users, how to specify the properties and settings for your KB+ user profile
- For users with the Editor role, how to specify and maintain the profile of your organisation (your institution) in KB+

Note that, as a user, you will need to complete your user profile before you apply for membership of your organisation in KB+. Requests can be approved by the Editor users of your organisation. Both of these activities use the pages described in this guide, but are described together in the MEMBERSHIP REQUESTS GUIDE.

Completing your KB+ User Profile

You gain access to KB+ through your association with an institution, for example a university, that has joined KB+. Use your institutional login details to login to KB+. Refer to the (LINK TO GETTING STARTED GUIDE) for details.

Once you have reached the KB+ Dashboard, your first step should be to complete your KB+ user profile. To access your profile, either click the Profile button (1) on the bar above the Dashboard:

Or open the Profile menu (2) from the side bar and click the Your Profile option (3):
User Profiles and Organisations
The *Your profile* page is then displayed:

![Your profile page](image)

- The *Display Name* field (1) will be automatically completed with the user name from your institutional login:

![Display Name field](image)
You can change the display name if you want. It only changes your user name as displayed in KB+; it will not change your actual institutional user name that you use to login.

- Enter your email address in the Email Address field (2). Note that if you do not enter a meaningful display name and email address, your membership requests will be rejected.

- Many pages in KB+ contain lists of items, e.g. the titles included in a package. The Default Page Size field (3) enables you to set how many items are displayed on such pages. Enter the required number between 5 and 100.

  Note that while the maximum value for the default page size is 100, it is possible to display more items by adding the "?max=x" parameter to the end of the URL of the page in question.

  For example, to see 250 titles per page on the
  - Existing http://kbplus.ac.uk/kbplus7/packageDetails/show/396
  - Modified http://kbplus.ac.uk/kbplus7/packageDetails/show/396?max=250

- Although most users will only belong to one organisation, some may have membership of multiple. If you have membership of multiple organisations use the Default Dashboard list (4) to select which organisation's dashboard you see when you log into KB+.

When you have entered all your required details, click the Update Profile button (5) to save the changes.

Messages will then be displayed at the top of the page regarding the changes you have made. For example:

You may now apply for membership of your organisation in KB+. Refer to the (LINK TO MEMBERSHIP REQUESTS GUIDE) for details.
Completing your Organisation’s KB+ Profile

Users with the Editor role can specify and maintain the profile of their organisation (your institution) in KB+.

To do this, either click the Organisation button (1) on the bar above the Dashboard:

Or open the Profile menu from the side bar and click the Organisation Info option (2):
The Organisation info page is then displayed:

![Organisation info page]

The page consists of three tabs:

- The Details tab is used to enter general details of your organisation in KB+.
- The Users tab lists your organisation’s users in KB+ and is used to approve and reject membership requests and to delete users.
- The Options tab is used to add user-defined licence properties. This will enable you to specify values for these properties for your licences.

The Users tab is described in the LINK TO MEMBERSHIP REQUESTS GUIDE. The Details and Options tabs are described below.
Details Tab
The details tab is used to enter general details of your organisation in KB+.

In the top panel (1), enter the name of your organisation, and if required enter or select other details such as address, organisation type, IP address range, sector, and so on.
The *Variant Names* panel (2) is used to add alternative names for the organisation, by entering a name in the field provided and clicking *Submit* (3). The name will then be displayed in the panel.

The *Identifiers* panel (4) is used to add any other identifiers of organisation, for example its Ringgold ID. Identifiers assigned by Jisc may also be added here.

To add an identifier, click *Add Identifier* (5). The *Add Organisation Identifier* page is then displayed:

Enter the identifier in the field and click the *Add Identifier* button. The identifier will then be displayed in the panel.

The *Administrative Membership* panel (6) displays system based information and can be ignored.

Once you have made all the changes you require, click *Update Organisation* (7) to save them.