Membership Requests

Introduction

This guide describes how to manage requests for membership of your institutional account. It describes how to request membership, and how to approve and reject requests.

Organisations, Profiles and Memberships

- Users gain access to KB+ through their association with an institution, for example a university, that has joined KB+. They can use their institutional login details to login to KB+.
- There are two types of members:
  - Editor members can edit all aspects of institutional accounts, create, amend, delete subscriptions and licences and approve other membership requests, and
  - Read only members can view all aspects of institutional accounts but cannot create, amend or delete any data.
- Every institution that has joined KB+ is added as an Organisation to the system. The details of this organisation can be completed and updated by Editor members of the organisation.
- Each user has a Profile that they should complete. Once this is done, they can request Membership of their organisation in KB+.
- There is no limit to the number of users that can join an institution in KB+.

Requesting Membership

To create, update or view any records in KB+ you must first be a member of an organisation.

To request membership to an organisation, go to your user profile by clicking the Profile button (1) on the Dashboard:
Or select the *Your Profile* option (2) from the *Profile* menu:

On the *Your profile* page, enter your details including an email address (3).

Refer to PROFILES GUIDE for further information on the *Your profile* page.
Next, select your organisation from the Select Org drop-down menu (4) further down the page. Then choose the role you are requesting from the Select role drop-down (5), either Editor or Read-only user:

![Membership Request Form]

Finally, click the Request Membership button (6).

Note that you can be a member of more than one organisation (for example a consortia), although this is not usual.

**Checking your Administrative Membership Status**

To check the status of an Administrative membership request by you (i.e. approved or otherwise), access your profile as described above, and view the Administrative memberships panel of the Your profile page:

![Administrative Memberships Table]

Clicking on the name of an organisation (e.g. Jisc Collections in the example above) will open the Organisation info page for that organisation.

Refer to the PROFILES GUIDE for further information on the Organisation info page.
Approving and Rejecting Membership Requests

If you are an Editor user, you can approve or reject membership requests. You can also remove users who are no longer permitted to access your KB+ account.

To do this, access your Organisation info page by clicking the Organisation button (1) on the Dashboard:

On the Organisation info page, click the Users tab (2):
The Users tab lists all current members of your organisation and their Status (3), Approved, Rejected, Pending etc.

The user name of each user is listed under the User heading (4).

The Inst Role column (5) displays the role of each user: Editor (INST_ADM) or Read-only (INST_USER).

To approve or reject a membership request, or to remove a user completely, use the buttons under the Actions heading (6):

- Use 🔄 to approve a request (including those previously rejected).
- Use ⏪ to reject a request (and to revoke membership -see below).
- Use 🚧 to remove a user who is no longer permitted to access your KB+ account.

These buttons can also be used to approve a request that was previously rejected, and to reject a request that was previously accepted, revoking the user’s membership.