

# Group Security Manual

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# Group Security Manual

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## Table of Contents

|   |    |
|---|----|
| GROUP SECURITY - OVERVIEW.....                            | 4  |
| Background.....   | 5  |
| Library Group Security.....                               | 6  |
| SUMMARY OF RELEVANT FUNCTION .....                        | 8  |
| SETTING LIBRARY GROUPS .....                              | 9  |
| SETTING GROUP SECURITY.....                               | 11 |
| LIBRARY GROUP PERMITS .....                               | 12 |
| Setting Group Permits.....                                | 12 |
| Actions.....  | 14 |
| Tables .....  | 14 |
| LOGIN .....   | 16 |
| CATALOGUE & AUTHORITY .....                               | 17 |
| Authority .....   | 18 |
| Catalogue.....  | 20 |
| BORROWER .....  | 22 |
| Changing the Search 'Scope' in the Borrower Module .....  | 23 |
| STOCKITEM.....  | 25 |
| Changing the Search 'Scope' in the Stockitem Module ..... | 26 |
| PERIODICALS.....  | 28 |
| ORDERS.....   | 29 |
| SUPERVISOR .....  | 30 |
| Parameters by Location.....                               | 30 |
| Copy Parameters using Advance Copy.....                   | 31 |
| User Security Levels.....                                 | 33 |
| Group Restrictions.....                                   | 34 |
| Locations Parameters.....                                 | 34 |
| LocRepSMTP.....   | 35 |
| To Add LocRepSMTP Setting .....                           | 35 |
| Z39.50.....   | 36 |
| SECURITY LEVELS .....                                     | 37 |
| Setting Default Security Level .....                      | 38 |
| Searching Authorities .....                               | 39 |
| APPENDIX A – SAMPLE GROUP SECURITY CONFIGURATION .....    | 40 |

## GROUP SECURITY - OVERVIEW

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**Group Security enhances the Library Group facilities within the system. This facility allows permissions to be set via a Group level for the User Login Location.**

This will be used predominately by Union Catalogues, Multi-Branch or Multi-Campus Libraries, where Access and Control security is important. For example Borrower details in other Groups can be viewed but not modified or deleted.

It allows one Group (the Super Group) to be responsible for all resources but still allows other groups to add, modify or delete the resources within their group.

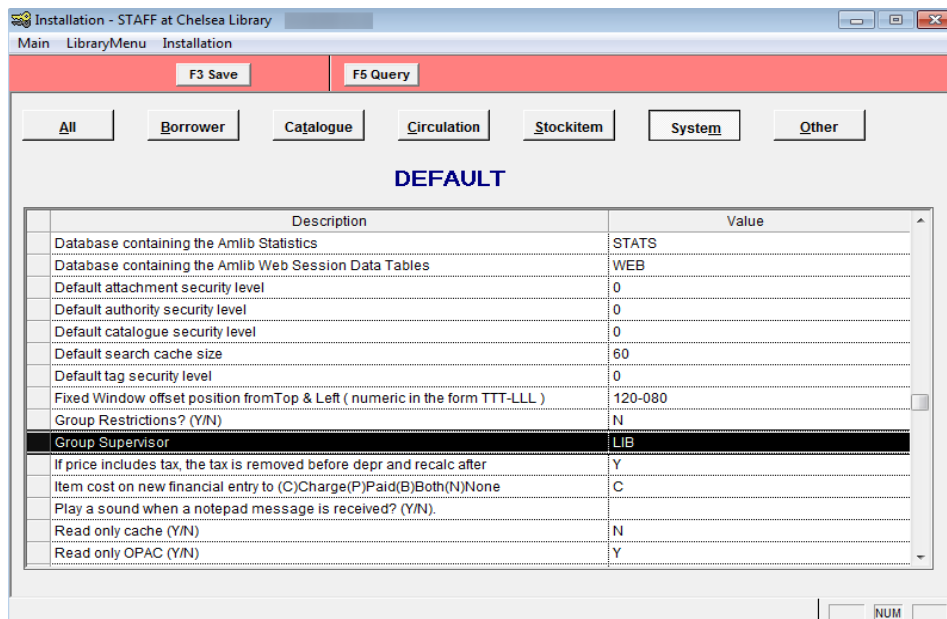


## Library Group Security

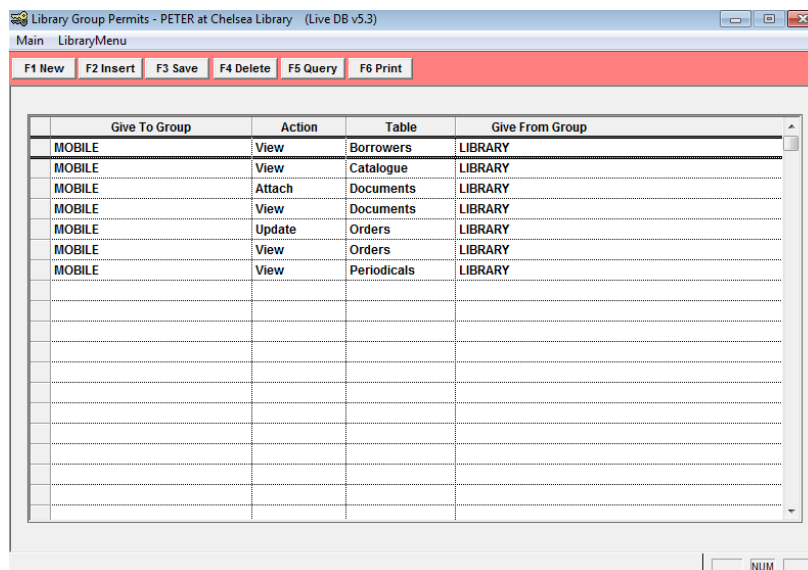
If required, Library Groups can be used for Security. If Group Security is not set - a Library Groups will be by default allocated to every Borrower, Stockitem, Catalogue, Authority, Order and Periodicals record. In most cases the Library Group would be the same for each location.

If you do want to use Group security, enter the codes against Locations as required. In the Installation screen (**Main > Supervisor > Installation** – click the **System** tab) define:

- **Group Supervisor** = (enter group code to be used as the Super Group ‘Library Group Administrator’)
- **Group Restrictions? (Y/N) = Y**



And enter relevant permissions in the Group permissions table (**Main > Supervisor > Supervisor > Library Menu > Library Group Permits**).



# Group Security Manual

Applicable screens will now have an option to view the Current Group or other Groups enabled through Group permissions table.

Periodical - STAFF at Cotts - ch

Main Application Transactions XReferences

F1 Clear F2 Insert F3 Update F4 Delete F5 Query F6 Table F7 << F8 < F9 > F10 >>

Title: [ ] Lib Group: 0  
Prev Title: [ ] ISSN: [ ] Form [ ] Stats Code [ ] Default Call No [ ]  
Supplier: [ ] Retain [ ] Cat Ref [ ] Circ List [ ]  
Brief Holdings Statement [ ] Freq [ ] Except ie SUNDAY, MARCH [ ]









Sort By: Issue Date Desc All Copies Received OverDue Future Copies Ref:

| Locn | Issue Details | Bar Code or R for received | Date Received | Claim | Comments Instructions | Issue Date | Likely Date | Cost | Call Numb |
|------|---------------|----------------------------|---------------|-------|-----------------------|------------|-------------|------|-----------|
|------|---------------|----------------------------|---------------|-------|-----------------------|------------|-------------|------|-----------|

Library Group selections

# Group Security Manual

## SUMMARY OF RELEVANT FUNCTION

|   |  |
|---|--|
| <p><b>Supervisor</b></p>     | <ul style="list-style-type: none"> <li>➤ Group / Locations enhancements enable sub-groups of Libraries to be grouped together for security and viewing options.</li> <li>➤ Different Installation Parameters based on Locations</li> <li>➤ Ability to set Loan Parameters based on Locations or Groups in Installation, Circulation</li> <li>➤ Level of Security at User Name Level (1-100)</li> <li>➤ Option to turn Group Security On/Off</li> <li>➤ Group Security Permissions</li> <li>➤ Setting of actual Groups</li> </ul> |
| <p><b>Authority</b></p>      | <ul style="list-style-type: none"> <li>➤ Security Level for Tasks</li> <li>➤ Default Security Level is set in Supervisor, Installation – Attachment, New Authority, Tag Security Levels</li> <li>➤ Searches of Authorities based on Groups (Select ALL Groups, Select Query Group(s), Select only My Own Group)</li> </ul>   |
| <p><b>Borrower</b></p>       | <ul style="list-style-type: none"> <li>➤ Searches of Borrowers based on Groups (Select ALL Groups, Select Query Group(s), Select only My Own Group)</li> <li>➤ Borrower Type Loans settings can be based on Groups or Locations</li> </ul>   |
| <p><b>Catalogue</b></p>    | <ul style="list-style-type: none"> <li>➤ Security Level for Tasks</li> <li>➤ Default Security Level is set in Supervisor, Installation – New Catalogue Security Level (Select ALL Groups, Select Query Group(s), Select only My Own Group)</li> <li>➤ Searches of Catalogues based on Groups</li> </ul>  |
| <p><b>Circulation</b></p>  | <ul style="list-style-type: none"> <li>➤ Only able to Circulate based on Group Security</li> <li>➤ View items/patrons based on Group Security</li> </ul>   |
| <p><b>Periodicals</b></p>  | <ul style="list-style-type: none"> <li>➤ View Periodicals based on Groups (Select ALL Groups, Select Query Group(s), Select only My Own Group)</li> </ul>  |
| <p><b>Reports</b></p>      | <ul style="list-style-type: none"> <li>➤ Access to Reports based on Groups High</li> </ul>   |
| <p><b>Stock item</b></p>   | <ul style="list-style-type: none"> <li>➤ Searches of Items based on Groups (Select ALL Groups, Select Query Group(s), Select only My Own Group)</li> </ul>   |



## SETTING LIBRARY GROUPS

1. Launch the *Amlib* client
2. Go to **Main > Supervisor>Supervisor** ,
3. From the Menu, select **LibraryMenu> LibraryGroup**
4. Go to **Main > Supervisor>Installation**, click the **System tab** the Library Group screen will display:

| Library Group | Return Status<br>If set to Y - items returned at a group member will have temp Locn set to this group name | For a return of an item that belongs to a locn within the current group Do you want a message ? | Allow Non Group Return<br>If Set to N , Returns of items for Items not belonging to group are disallowed Unless Issued by a group memi |
|---------------|--|---|--|
| EN            | Y  | Y   | Y  |
| O             | Y  | Y   | Y  |
| WS            | N  | Y   | N  |

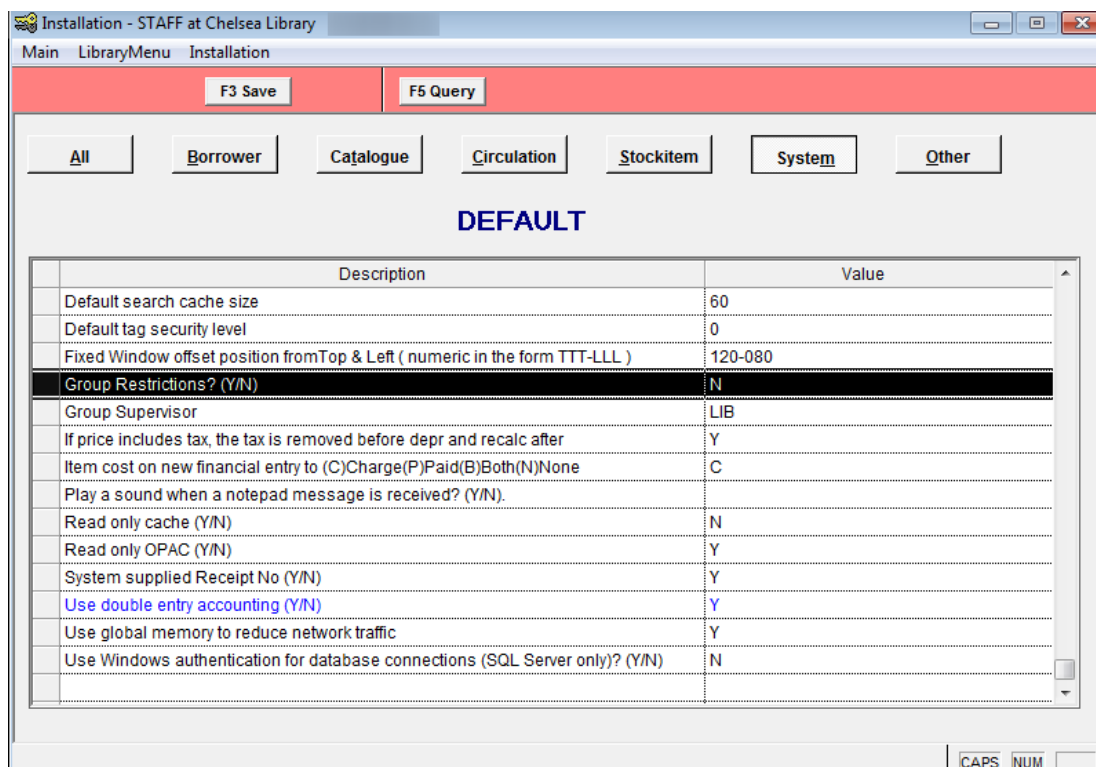
| COLUMN NAME                   | DESCRIPTION  | ENTRY     |
|-------------------------------|--|-----------|
| <b>Library Group</b>          | The name of the Library Group – see Locations  | Code Name |
| <b>Return Status</b>          | If set to Y – items returned as a group member will have the Temporary Location set to this Group Name | Y/N       |
| <b>Message Request</b>        | For a return of an item that belongs to a Location within the current group. Do you want a message?    | Y/N       |
| <b>Allow Non Group Return</b> | If set to N, returns of items for Items not belonging to a group are disallowed                        | Y/N       |



## SETTING GROUP SECURITY

1. Launch the *Amlib* client
2. Go to **Main > Supervisor>Installation**, click the **System tab**
3. Change change/add the following setting:
  - Group Restriction? (Y/N) = Y
  - Group Supervisor = LIB
4. Click on the **F3 Save** button
5. Exit and restart *Amlib* client

| Parameter                      | Setting | Explanation   |
|--------------------------------|---------|---|
| <b>Group Restrictions Y/N?</b> | N       | No restrictions are set and no checking of Permissions other than Login User  |
|                                | Y       | Restrictions are set. Checking of Permissions for the Login Location Group applied in relation to that of the Login User's individual permissions   |
| <b>Group Supervisor</b>        | LIB     | Library Group which will have Supervisor Control over the system.<br><br>When using the applications, if the Login Location of the User (current Group) is the Group Supervisor, no restrictions apply. |



## LIBRARY GROUP PERMITS

If Groups Security is active, the Groups can have interaction between each other as set in the Library Group Permits table. It is not necessary to set permissions for the Group set as the Super Group as there are no restrictions on this Group by Default.

If Amlib is shared by more than one group location, it is possible to give or take access from the location to which a user logs in.

If the Group Restrictions is set to Y and Group Supervisor specified in (**Main > Supervisor > Installation – System** tab) all other locations will need permission set in the Library Group permits table to enable them to perform tasks for items and borrowers belonging to other locations. If permissions are not set, access to items and borrowers belonging to other locations will be denied.

### Setting Group Permits

1. Launch the *Amlib* client
2. Go to **Main > Supervisor > Supervisor** ,
3. From the Menu, select **LibraryMenu > LibraryGroupPermits** the Library Group Permits screen will display:

Library Group Permits - STAFF at Eastville

Main LibraryMenu

F1 New F2 Insert F3 Save F4 Delete F5 Query F6 Print

| Give To Group | Action   | Table     | Give From Group |
|---------------|----------|-----------|-----------------|
| → 0           |          |           |                 |
| WS            | View     | Items     | EN              |
| WS            | Insert   | Borrowers | EN              |
| WS            | Update   | Items     | EN              |
| WS            | Delete   |           |                 |
|               | Batch    |           |                 |
|               | Attach   |           |                 |
|               | Hold     |           |                 |
|               | Loan     |           |                 |
|               | CheckIn  |           |                 |
|               | Transfer |           |                 |

Scroll down to see full list of Actions:

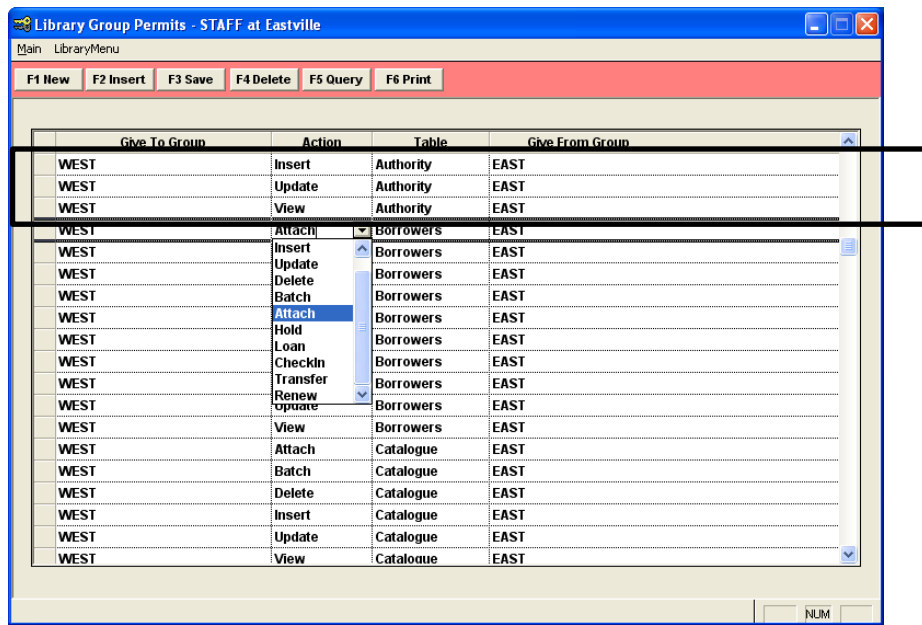
- View
- Insert
- Update
- Delete
- Batch
- Attach
- Hold
- Loan
- CheckIn
- Transfer
- Renew

4. Click the **F1 New** or **F2 Insert** button
5. Enter the setting in the table as per the following table:

# Group Security Manual

| COLUMN          | EXPLANATION   | EXAMPLE   |
|-----------------|---|-----------|
| Give to Group   | Give permission for the action TO this Group, allowing this particular group when logged in to see records from the Groups defined                                    | WS        |
| Action          | Select the Action from the Drop-down box*   | View      |
| Table           | Select the Database Table for this permission from the Drop-down box:<br><br>Authority, Borrowers, Catalogue, Catalogue Tags, Items, Periodicals, Documents or Orders | Borrowers |
| Give from Group | Select the Group that is to be sharing their records for the action chosen e.g. View these records, allow Updates but not Deletions or Insertions                     | O         |

\*If Permissions is given for certain Actions e.g. Update, View permissions are inserted into the Table automatically where necessary. It is logical that in order to update one need to be able view the record first.



- Click the **F3 Save** button when completed. When a user logs in, the location associated with the User's Login, will now determine the permission they have for actions on other locations items, borrowers, catalogues and authorities.

**Note:** When using modules that have group permits, you also need to **SelectQueryGroup(s)** within the module before using **F5 Query**. If nothing is found a message will appear showing the Groups being searched has not result.

# Group Security Manual



## Actions

The Actions that can be permitted include:

| ACTION          | EXPLANATION   | EXAMPLE  |
|-----------------|---|--|
| <b>View</b>     | Search, Report and display  | View Borrower details  |
| <b>Insert</b>   | Add new   | Create new Borrowers   |
| <b>Update</b>   | Modify and Save   | Change Borrower details  |
| <b>Delete</b>   | Remove from the Database  | Delete Borrowers   |
| <b>Batch</b>    | Run the Print job in Scheduler using the Print button and process Borrowers that are within the Groups allowed to Batch for scheduling. | Create Financials & Histories through Reports of those Borrowers which can be modified |
| <b>Attach</b>   | Attach Images or Documents  | Attach photos to Borrower  |
| <b>Hold</b>     | Ability to reserve items  | Reserve items for Borrowers  |
| <b>Loan</b>     | Use Circulation   | Loan items to Borrowers  |
| <b>CheckIn</b>  | Use Returns   | Return items from Borrowers  |
| <b>Transfer</b> | Use Transfer to change Permanent and/or Temporary Locations of items  | Transfer items between Branches  |
| <b>Renew</b>    | Ability to Renew items currently on loan  | Renew only items from certain Groups   |

## Tables

| TABLE                 | EXPLANATION        | EXAMPLE   |
|-----------------------|--------------------|---|
| <b>Authority</b>      | Authority Tags     | View, Insert, Update, Delete Authorities                                  |
| <b>Borrowers</b>      | Borrower details   | View, Insert, Update, Delete Attach photographs, Batch, Loan, Hold, Renew |
| <b>Catalogue</b>      | Catalogue Details  | View, Insert, Update, Delete Attach (Images & Documents), Batch           |
| <b>Catalogue Tags</b> | Non-Authority Tags | View, Insert, Update, Delete Non Authorities                              |
| <b>Items</b>          | Stockitems         | View, Insert, Update, Delete,   |

## Group Security Manual

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|                    |  |   |
|--------------------|--|---|
|                    |  | CheckIn, Transfer, Renew, Loan, Batch,                  |
| <b>Periodicals</b> | Periodical Master or Issues              | View, Insert, Update, Delete Periodicals                |
| <b>Documents</b>   | Images and Documents used as Attachments | View, Insert, Update, Delete attachments                |
| <b>Orders</b>      | Order Header and Order Lines             | View, Insert, Update, Delete Order Lines and/or Headers |
| <b>Parameters</b>  | Installation parameters for Location     | View, Insert, Update, Delete                            |
| <b>Login</b>       | Login into that specific location        | View – Depends on the Default Location for the User     |
| <b>Calendar</b>    | Alter Calendar for Location              | View, Update  |
| <b>Location</b>    | Change Location parameters               | View, Update, Insert, Delete                            |

## LOGIN

The available login Locations depend on the User Name's default Location and the View permissions allocated in Group Permits in relation to Login.

User names are associated with a Default Login Location can be set in supervisor.

1. Launch the *Amlib* client
2. Go to **Main > Supervisor > UserNames**

| User Name | Password (Invisible) | Location | Circ at this Location Only (Y/N) | Level |
|-----------|----------------------|----------|----------------------------------|-------|
| ANNE      |                      | EAS      | N                                | 96    |
| CATNET    |                      | EAS      | N                                | 92    |
| CHRIS     |                      | EAS      | N                                | 100   |
| DEBBIE    |                      | WES      | N                                | 100   |
| GAYE      |                      | EAS      | N                                | 100   |
| JOHN      |                      | EAS      | N                                | 100   |
| JOLA      |                      | EAS      | N                                | 100   |
| LOANS     |                      | EAS      | Y                                | 93    |
| SAM       |                      | NOR      | N                                | 100   |
| SIMON     |                      | EAS      | N                                | 100   |
| STAFF     |                      | EAS      | N                                | 93    |
| TOM       |                      | SOU      | N                                | 100   |

Location sets the Library Group at Login



# Group Security Manual

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## CATALOGUE & AUTHORITY

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An Owning Library and Security Groups are applied to:

|                            |          |
|----------------------------|----------|
| Authority                  | <b>A</b> |
| Catalogue                  | <b>C</b> |
| Non Authority Tags         | <b>T</b> |
| Image & Documents attached | <b>D</b> |

Permissions to View, Modify, Insert and Delete will depend on:

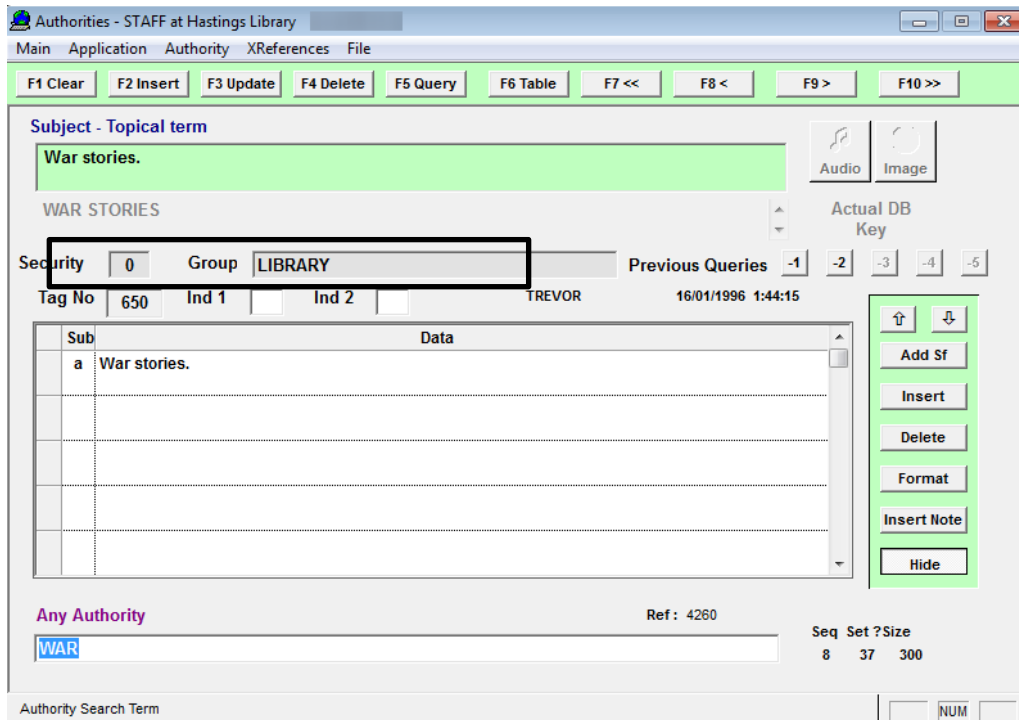
- Security level of User in relation to Security level of Task
- Group settings (if overall group security is applied)
- Permissions of the Login User (normal Menu and Button permissions apply)
- To Access and Process Catalogue records from other Groups, the Group permissions need to be applied:

| <b>APPLICATION</b>          | <b>PERMISSION NEEDED</b> |
|-----------------------------|--------------------------|
| Searching                   | View                     |
| Catalogue & Authority Files | View                     |
| Insert Tag                  | View & Update            |
| Marc Take Up                | View, Insert and Update  |
| New Catalogue               | View, Insert and Update  |
| New Authority               | View, Insert and Update  |

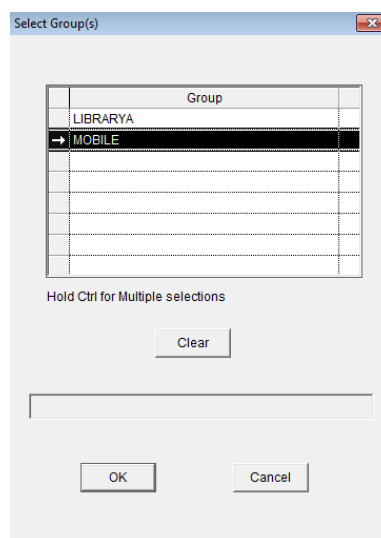
## Authority

To alter group in authority:

1. Launch the *Amlib* client
2. Go to **Main** > Authorities > Authorities
3. Perform a query search for an authority, and current allocated library group is shown:

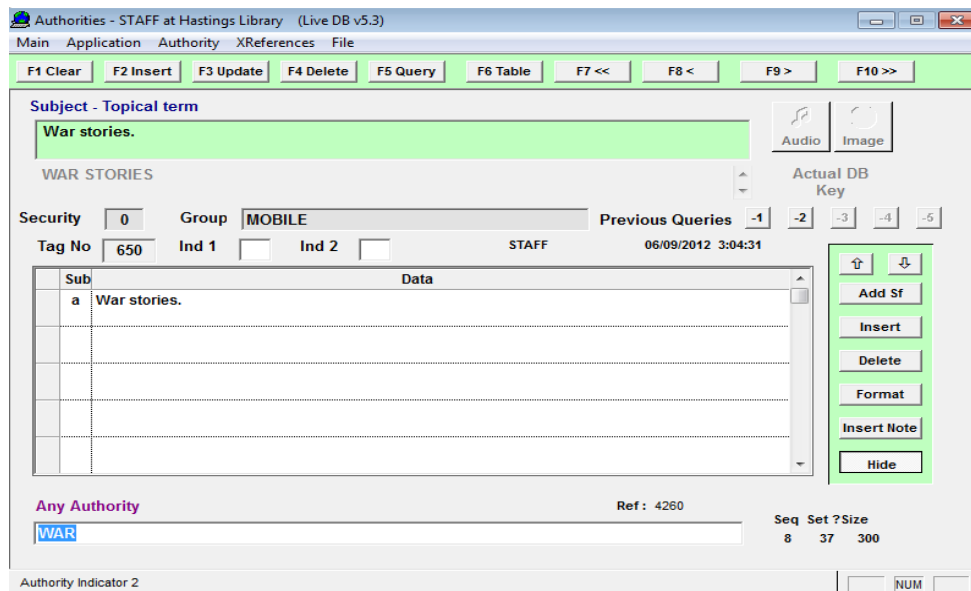


4. From the Authority menu, select **Authority > AuthorityChangeGroup**
5. Highlight to select new group for this catalogue:



6. Click the Ok button, to return the Authority screen, new selected group will now display

# Group Security Manual



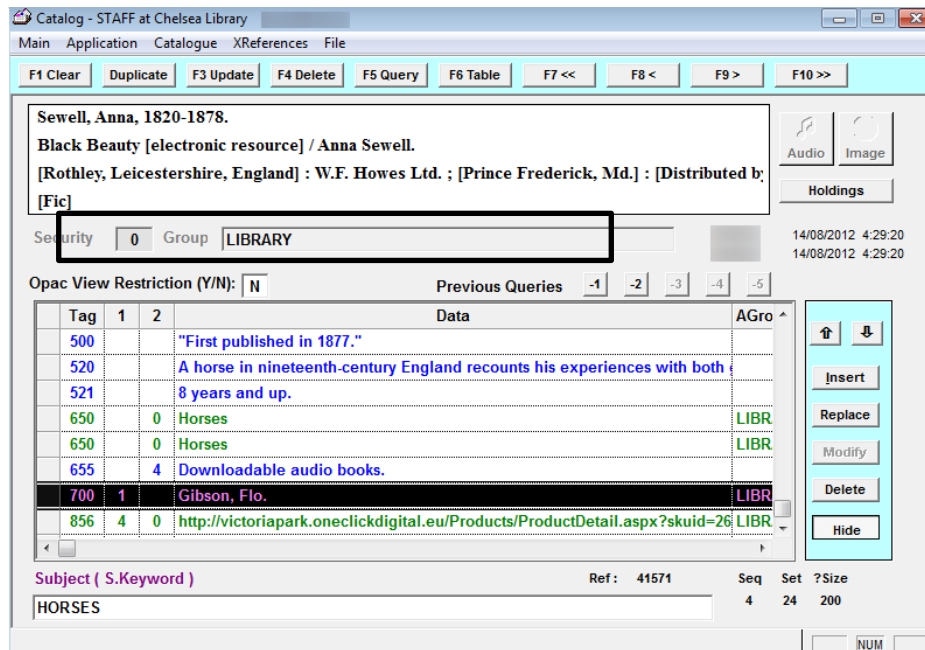
7. Click F3 Update to save the changes to the group.

**Note:** Security and access does not apply to the subfield level except in the case of shared Authority and Non Authority tags.

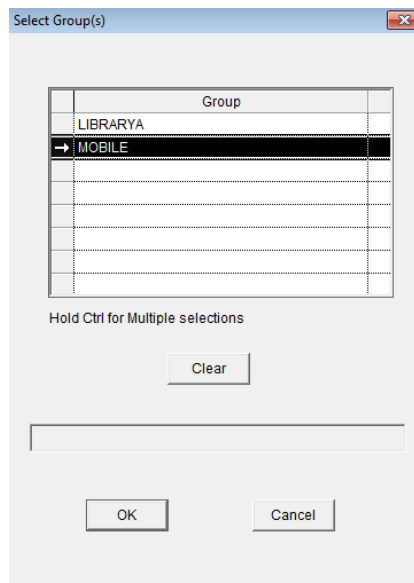
## Catalogue

To alter group in catalogues:

8. Launch the *Amlib* client
9. Go to **Main** > Catalogue > Catalogue
10. Perform a query search, and current allocated library group is shown:



11. From the catalogue menu, select **Catalogue >ChangeGroupCatOnly**
12. Highlight to select new group for this catalogue:



13. Click the Ok button, to return the catalogue screen, new selected group will now display

# Group Security Manual

Catalog - STAFF at Chelsea Library (Live DB v5.3)

Main Application Catalogue XReferences File

F1 Clear Duplicate F3 Update F4 Delete F5 Query F6 Table F7 << F8 < F9 > F10 >>

Sewell, Anna, 1820-1878.  
Black Beauty [electronic resource] / Anna Sewell.  
[Rothley, Leicestershire, England] : W.F. Howes Ltd. ; [Prince Frederick, Md.] : [Distributed by  
[Fic]

Security 0 Group MOBILE PETER 14/08/2012 4:29:20  
PETER 14/08/2012 4:29:20

Opac View Restriction (Y/N): N Previous Queries -1 -2 -3 -4 -5

| Tag | 1 | 2 | Data  | AGro |
|-----|---|---|---|------|
| 500 |   |   | "First published in 1877."  |      |
| 520 |   |   | A horse in nineteenth-century England recounts his experiences with both  |      |
| 521 |   |   | 8 years and up.   |      |
| 650 | 0 | 0 | Horses  | LIBR |
| 650 | 0 | 0 | Horses  | LIBR |
| 655 | 4 |   | Downloadable audio books.   |      |
| 700 | 1 |   | Gibson, Flo.  | LIBR |
| 856 | 4 | 0 | <a href="http://victoriapark.oneclickdigital.eu/Products/ProductDetail.aspx?skuid=26">http://victoriapark.oneclickdigital.eu/Products/ProductDetail.aspx?skuid=26</a> | LIBR |

Subject ( S.Keyword ) Ref: 41571 Seq Set ?Size  
HORSES 4 24 200

NUM

14. Click **F3 Update** button to save the group change.

## BORROWER

By default when the Borrower module is started the Search 'Scope' defaults to the Group to which the logged in user belongs to.

**Note:** The Search 'Scope' is unlimited if there are no groups defined.

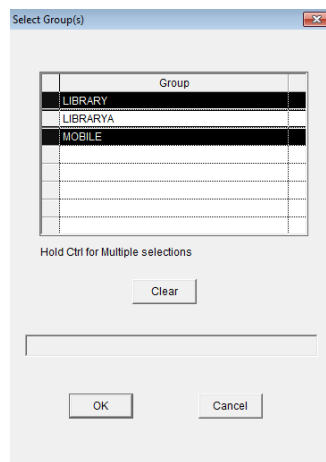
The Search Scope can be changed to:

- Current Group (Actual Group Code is displayed)
- Selected
- All Groups

## Changing the Search 'Scope' in the Borrower Module

"All Groups" is a list of Group Codes that can be searched. If Group Security is on then the list consists of the Groups for which the user has 'V' (View) permissions.

1. Launch the *Amlib* client
2. Go to **Main > Borrower > Borrower**
3. From the Borrower menu, select **Borrower> SelectQueryGroup(s)** – the Select Group(s) screen will display
4. Highlight to select group required in the Search 'Scope'



**Note:** To select multiple groups hold down the Ctrl key on the keyboard and select the group

5. Click the **Ok** button to return the borrower screen, the select group are now in the Search 'Scope'

**Note:**

## Group Security Manual

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- Selection will remain current until the user changes his selection or the session is ended
- If Group Security is off then the list contains all the Group Codes
- Current search scope is stored with the search history and is restored if one of the last five searches is selected
- List of Saved Files is not filtered if Group Security is off. When a Saved File is 'displayed' the current search scope is applied

| APPLICATION           |                             | PERMISSION NEEDED                               |
|-----------------------|-----------------------------|---|
| Searching             |                             | View  |
| Borrower Files        |                             | View  |
| Adding Memos          |                             | View & Update                                   |
| Where Searches        |                             | View  |
| Saved Where Searches  |                             | View  |
| Borrower Maintenance  | Inserting New Borrowers     | View, Insert and Update                         |
|                       | Modifying a Borrower record | View & Update                                   |
|                       | Delete Borrowers            | View & Delete                                   |
|                       | Deleting Borrower Addresses | View & Update                                   |
|                       | Mass change                 | View & Update                                   |
|                       | Mass delete                 | View & Delete                                   |
|                       | Mass Address delete         | View & Update                                   |
|                       | Mass Memo                   | View & Update                                   |
| Import                |                             | View, Insert and Update                         |
| On-Line Change        |                             | View, Insert and Update                         |
| Financial Transaction |                             | View & Update                                   |
| Loan Parameters       |                             | View for Lookup<br><br>Update for modifications |



## STOCKITEM

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By default when the Stockitem module is started the Search 'Scope' defaults to the Group to which the logged in user belongs to.

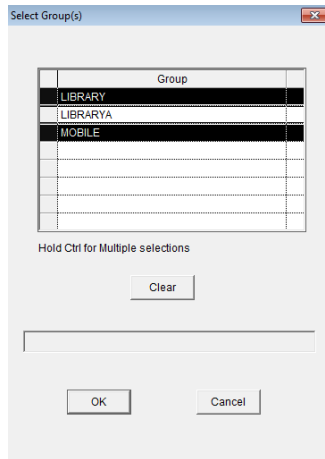
**Note:** The Search 'Scope' is unlimited if there are no groups defined.

The Search Scope can be changed to:

- Current Group (Actual Group Code is displayed)
- Selected
- All Groups (List of Group Codes that can be searched)

## Changing the Search 'Scope' in the Stockitem Module

1. Launch the *Amlib* client
2. Go to **Main > Stockitem > Stockitem**
3. From the Stockitem menu, select **Item> SelectQueryGroup(s)** – the Select Group(s) screen will display
4. Highlight to select group required in the Search 'Scope'



**Note:** To select multiple groups hold down the Ctrl key on the keyboard and select the group

5. Click the **Ok** button to return the borrower screen, the select group are now in the Search 'Scope'

# Group Security Manual

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**Note:**

- Selection will remain current until the user changes his selection or the session is ended
- If Group Security is off then the list contains all the Group Codes
- If Group Security is on then the list consists of the Groups for which the user has 'V' (View) permissions.
- When the user clears the screen ready for a new search the Search Scope remains set to the user's current selection for the session
- Current search scope is stored with the search history and is restored if one of the last five searches is selected
- List of Saved Files is not filtered if Group Security is off. When a Saved File is 'displayed' the current search scope is applied

| APPLICATION           |                          | PERMISSION NEEDED                                    |
|-----------------------|--------------------------|--|
| Searching             |                          | View   |
| Stockitem Files       |                          | View   |
| Adding Memos          |                          | View & Update  |
| Where Searches        |                          | View   |
| Saved Where Searches  |                          | View   |
| Stockitem Maintenance | Inserting New Item       | View, Insert and Update                              |
|                       | Modifying an Item record | View & Update  |
|                       | Delete Item              | View & Delete  |
|                       | Mass change              | View & Update  |
|                       | Stockwand Change         | View & Update  |
|                       | Mass delete              | View & Delete  |
|                       | Mass Memo                | View & Update  |
|                       | Refresh from Catalogue   | View & Update  |
| Stocktakes            |                          | Does not show counts or clear flags for other Groups |
| Reserve Item          |                          | View & Hold  |
| Issue Item            |                          | View & Loan  |

# Group Security Manual

## PERIODICALS

When the Periodical module is started the group is defaulted to the group to which the user logged in belongs to.

And depending on the viewing permission given to the logged in user other groups can be selected from the Lib Group drop down box.

Library Group Drop Down Box to select other groups

| APPLICATION                | PERMISSION NEEDED     |
|----------------------------|-----------------------|
| Searching                  | View                  |
| Modify existing Periodical | View and Update       |
| Insert Periodical          | View, Insert & Update |
| New Subscription           | View, Insert & Update |
| Attach Catalogue           | View, Insert & Update |
| Delete Copies/Issues       | View, Delete          |

# Group Security Manual

## ORDERS

All orders, invoices, budgets, accounts, account groups, transaction types, allocation codes, financial transactions and financial years can be set up by library group. This allows the separation of order and financial data for each library group in a single Amlib installation.

To assist in setting up accounts, account groups, transaction types, and financial years in subsidiary groups (other than Supervisor group), a function is provided to copy selected data from the Supervisor group to the current Group – see [Copy Parameters Using Advance Copy](#)

If Group Security is set to **Y** in the installation parameters then access to group data is restricted using the Library Group Permits settings.

Order Header - STAFF at Chelsea Library

Main Application Orders Transactions XReferences

F1 Clear F2 Insert F3 Update F4 Delete F5 Query F6 Table F7 << F8 < F9 > F10 >>

Order No: ?????????? (AMREF1) Order Group: Lib Group: LIBRARY  
MOBILE  
LIBRARY

Summary:  
Supplier: (AMREF2) Invoiced: 0  
Supplier's Reference (EXTREF1) Ordered: 0

Forex Code: AUD Forex Rate: 1.000 Forex Date: 01/01/1995 Forex Amount: AU\$0.00  
Date Placed: 17/09/2012 Date Expected: Date Printed: Local Amount: AU\$0.00

Type: NORM Condition: NORM Date to Claim: Status: PENDING

Notes:

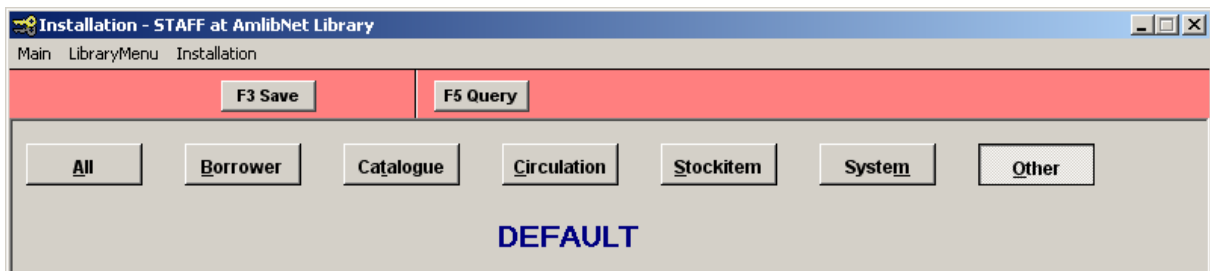
| Item | Ln | Line 1 Details | Line 2 Details | Line 6 Details | Qty Ord | Qty Recd | Qty Invd | Order Line Process | Cost (Inc Tax) | Item Form | Item Stats | Account | Alloc. |
|------|----|----------------|----------------|----------------|---------|----------|----------|--------------------|----------------|-----------|------------|---------|--------|
|      |    |                |                |                |         |          |          |                    |                |           |            |         |        |
|      |    |                |                |                |         |          |          |                    |                |           |            |         |        |
|      |    |                |                |                |         |          |          |                    |                |           |            |         |        |
|      |    |                |                |                |         |          |          |                    |                |           |            |         |        |

NUM

## SUPERVISOR

All libraries using Amlib should check the parameters available in the Installation window within the Supervisor module.

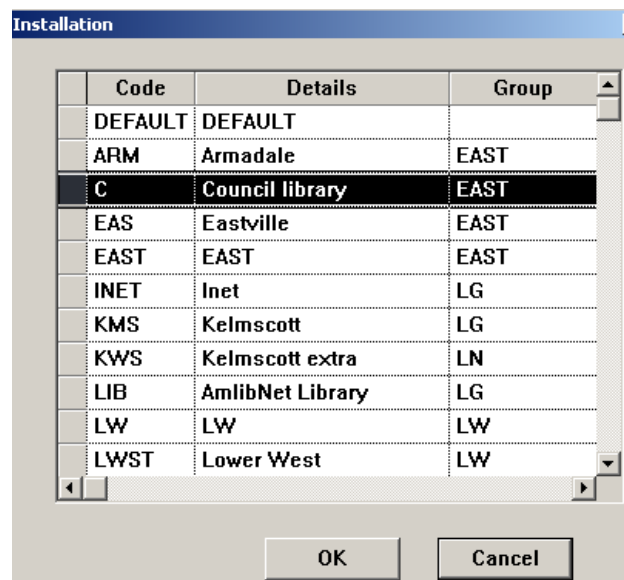
1. Launch the *Amlib* client
2. Go to **Main > Supervisor > Installation** - the Installation parameters for the Default Location screen will display



### Parameters by Location

Each location setup in Amlib can have individual parameters set according to the needs of that location. Location can be changed directly from the Supervisor – Installation window.

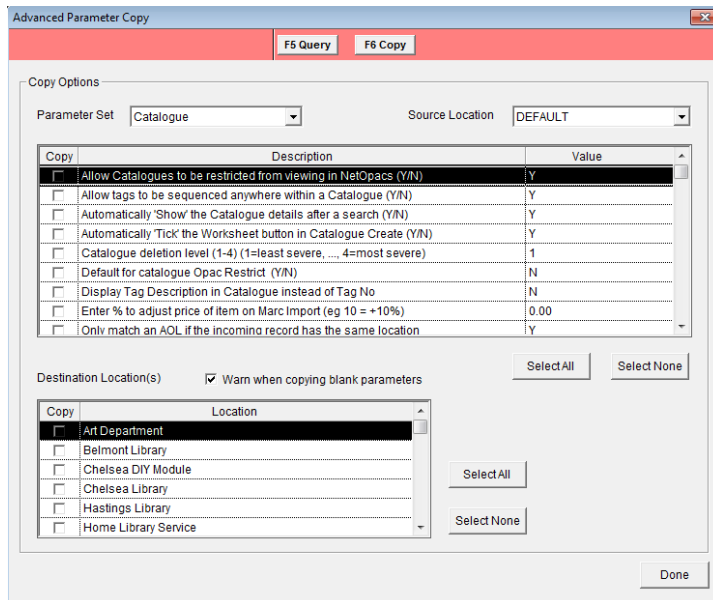
1. Launch the Amlib client
2. Go to **Main > Supervisor > Installation**
3. From the Installation screen menu, select **Installation > Choose Location** – the Installation screen will display



4. Highlight the Location and choose OK
5. The Installation parameters relevant for that location will display

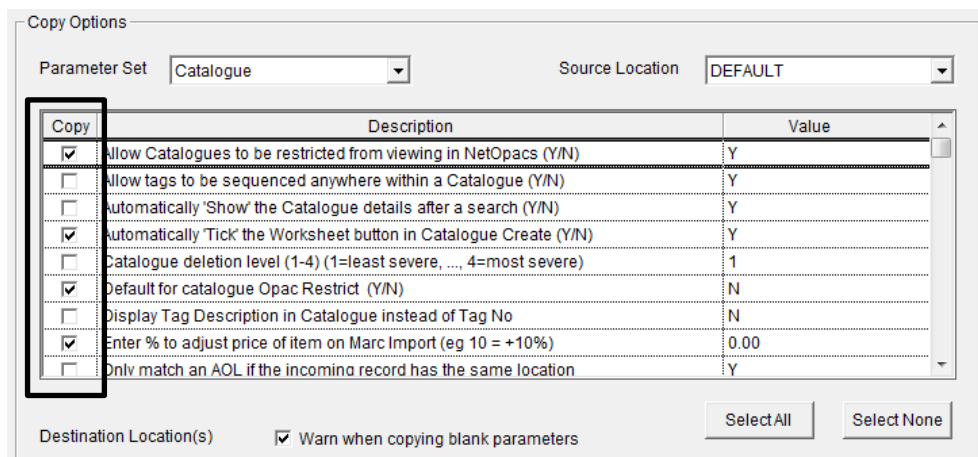
## Copy Parameters Using Advance Copy

1. Launch the Amlib client
2. Go to **Main > Supervisor > Installation**
3. From the Installation screen menu, select **Installation > AdvanceCopy** – the Advance Parameter Copy screen will display



4. Select Parameter Set and Source Location
  - a. In the Parameter Set dropdown, select the area specific to the installation parameters you wish to copy, or select 'All'
  - b. In the Source Location drop down, select the location you wish to copy parameter from
5. Select the parameter you wish to copy, by ticking the box in the 'Copy' column

Alternatively, to select all parameters click the **Select All** button



6. In the Destination Location(s) list select the desire location to which selected parameter are to be copied to, by ticking the box in the 'Copy' column

7. Press the **F6 Copy** button when complete, a message to confirm process will display:





## User Security Levels

The default security level for attachments, authorities, catalogues and tag can be set in the **Main > Supervisor > Installation, System** tab.

|                                   |   |
|-----------------------------------|---|
| Default attachment security level | 0 |
| Default authority security level  | 0 |
| Default catalogue security level  | 0 |

Security level can also be set in **Main > Supervisor > Username**. Each user can have a level of access set. For example if a Catalogue record has a security level of 100 it cannot be modified by a user set at level 50.

| User Name | Location | Circ at this Location Only (Y/N) | Level |
|-----------|----------|----------------------------------|-------|
| CHRIS     | HASTINGS | N                                | 100   |
| CIRC      | CHEL SEA | N                                | 100   |
| DIY1      | CHEL SEA | N                                | 91    |
| FIONA     | BELMONT  | N                                | 90    |
| JOHN      | CHEL SEA | N                                | 100   |
| NETOPACS  | WEB      | N                                | 100   |
| OPAC1     | CHEL SEA | N                                | 91    |
| STAFF     | CHEL SEA | N                                | 100   |
| TARA      | CHEL SEA | N                                | 100   |
| TREVOR    | HASTINGS | N                                | 100   |

# Group Security Manual

## Group Restrictions

Group Restriction & Supervisor parameters are optional and can be set in the **Main > Supervisor > Installation, System** tab.

|                           |         |
|---------------------------|---------|
| Group Restrictions? (Y/N) | N       |
| Group Supervisor          | LIBRARY |

- If Group Restrictions is set to N and Group Supervisor is left blank then no other actions are required
- If Group Restrictions is set to Y a Group Supervisor Location must be nominated

### Note:

If Group Restriction is set to Y a Library Group Code must be assigned to all locations in **Main > Supervisor > Location**

Also Library Group Permits need to be set by Group Supervisor for group see- [Setting Group Permits](#). If permits are not set, the user will be restricted to acting on that location's records only.

## Locations Parameters

Location parameters can be set in **Main > Supervisor > Installation, Other** tab.

| Description  | Value          |
|--|----------------|
| Location is Valid for Holdings                                     |                |
| Location is Valid for OPAC Enquiries                               |                |
| Location is Valid for Registrations & Circulation                  |                |
| Location's Base File Name ILLS Net Interface                       |                |
| Location's Borrower Barcode for Memos                              |                |
| Location's Depreciation Account No.                                |                |
| Location's Depreciation Allocation                                 |                |
| Location's EAN for EDI   |                |
| Location's Help Files Ref Directory                                | C:\Amlib\Help\ |
| Location's Picture Directory                                       |                |
| Location's SAN for EDI   |                |
| Location's Sound Directory   |                |
| Location's User Password for ILLS Net Interface                    |                |
| Location's UserName for ILLS Net Interface                         |                |
| Only show reports for: (L)ocation, (G)roup, (O)perator, Show (A)ll | A              |

## LocRep SMTP

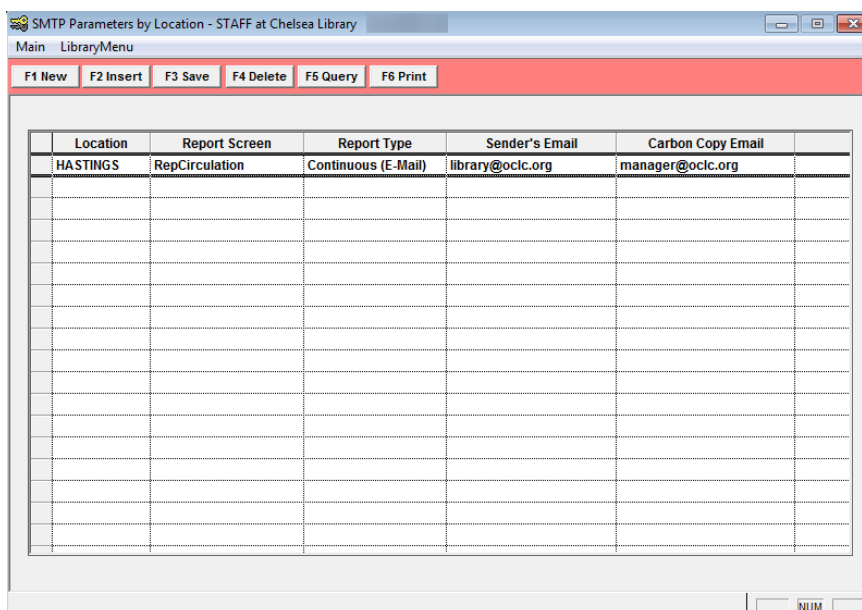
When sending e-mail notices it is possible to set up the reply e-mail address to be different from where the report is sent.

### Add LocRepSMTP Setting

1. Go to Main > **Main** > **Supervisor** > **Installation**
2. From the Installation screen menu, select **Installation**> **LibraryMenu** >**LocRepSMTP** - the SMTP Parameters by Location screen will display
3. Click the **F1 New** button to set up a new address for a report type

| Heading         | Location   | Report Screen                                       | Report Type   | Sender's Email   | Carbon Copy Email  |
|-----------------|--|---|---|--|--|
| <b>Example</b>  | Hasting  | RepCirculation                                      | Continuous (E-Mail)   | library@oclc.org   | manager@oclc.org   |
| <b>Comments</b> | Select location where this setting is to be used | Select reporting module where setting is to be used | Select template type in the selected module which will use given settings | Email address to appear in the 'From' box in any correspondence sent from provided module and location | Any correspondence sent from provided module and location are also sent to provided email address given here |

4. Click the **F3Save** button when you have finished entering the new setting



**Note:** Changes won't be applied until you have completely shut-down and restart Amlib.

## Z39.50

When cataloguing using Z39.50, Security levels can be applied while importing records into Amlib. Security Levels is only used if Group Security Level is applied to Catalogue and Authority records – see [Catalogue & Authority](#) section of this guide.

The screenshot shows the 'Import' dialog box with the following details:

- Import Records:**
  - Total Number of selections: 1
  - Number already imported: 0
  - Number that cannot be imported: 0
  - Total Number to be imported: 1
  - Security Lvl New entries: 0** (highlighted)
  - Refresh any affected items:  Refresh
- Tag Actions:**
  - Enter a comma separated list of tags (in 3 digit format) that you never wish to import eg 008,631: 082,906,925,955
  - List of tags that should be retained in case of matching catalogue record: 099
  - All the imported records can be placed into a Saved File. Use the 'Browse' button to choose a Saved File. File name: Z39.50 import 14/09 LI

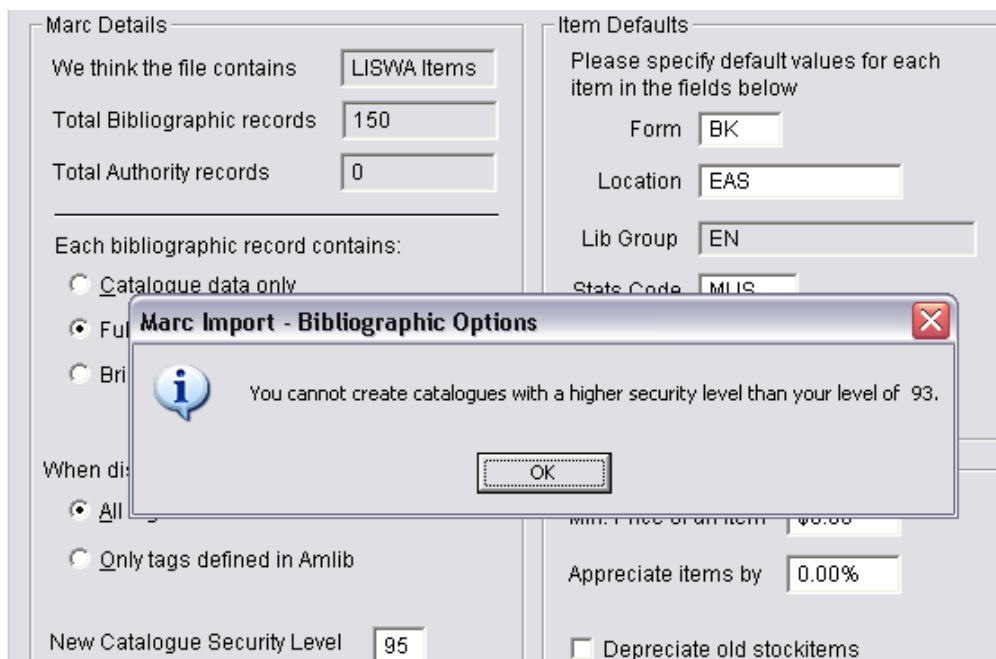
**Note:** The default is 0 which is valid for all libraries not using the Group Security option.

## SECURITY LEVELS

Tasks within Catalogue and Authority can be set to only run with a certain Security level. The Default security level needed can be set in Supervisor. Amlib will then compare the User level of the operator to that needed for the task.

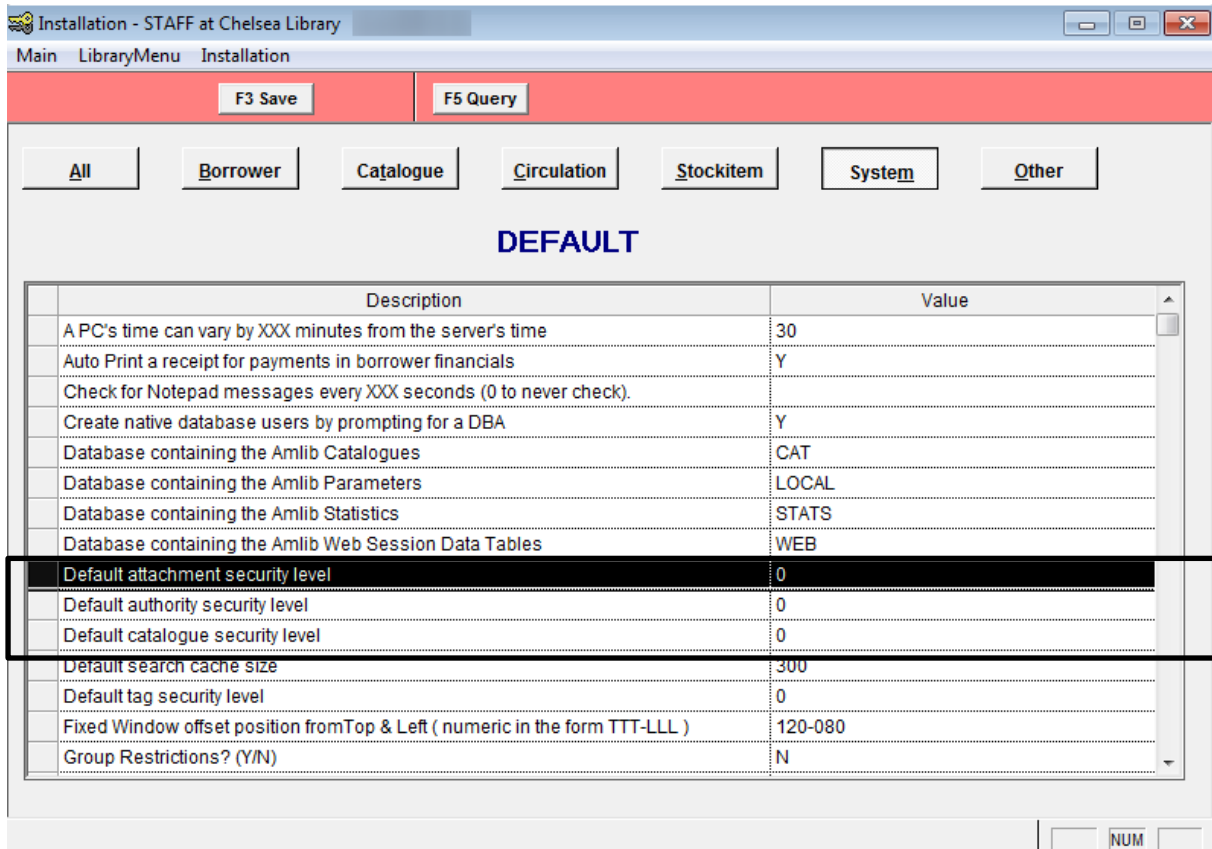
### Example

During a Marc Take-up the Default Catalogue Security Level in Supervisor is set to 100, however the User security level is set to 96 and gets prompted a message that this activity cannot be continued.



## Setting Default Security Level

1. Go to Main > **Main** > **Supervisor** > Installation, click the **System** tab
2. Insert the security level for:
  - **Default attachment security level**
  - **Default authority security level**
  - **Default catalogue security level**



Installation - STAFF at Chelsea Library

Main LibraryMenu Installation

F3 Save F5 Query

All Borrower Catalogue Circulation Stockitem **System** Other

**DEFAULT**

| Description   | Value    |
|---|----------|
| A PC's time can vary by XXX minutes from the server's time                  | 30       |
| Auto Print a receipt for payments in borrower financials                    | Y        |
| Check for Notepad messages every XXX seconds (0 to never check).            |          |
| Create native database users by prompting for a DBA                         | Y        |
| Database containing the Amlib Catalogues                                    | CAT      |
| Database containing the Amlib Parameters                                    | LOCAL    |
| Database containing the Amlib Statistics                                    | STATS    |
| Database containing the Amlib Web Session Data Tables                       | WEB      |
| <b>Default attachment security level</b>                                    | <b>0</b> |
| <b>Default authority security level</b>                                     | <b>0</b> |
| <b>Default catalogue security level</b>                                     | <b>0</b> |
| Default search cache size   | 300      |
| Default tag security level  | 0        |
| Fixed Window offset position fromTop & Left ( numeric in the form TTT-LLL ) | 120-080  |
| Group Restrictions? (Y/N)   | N        |

NUM

3. Click the **F3Save** button when you have finished entering the new default security level setting

**Note:** Changes won't be applied until you have completely shut-down and restart Amlib.

Security Levels for the individual Users are set in Usernames and can be set to a maximum of 100 – see [User Security Levels](#) section of this guide.

## Searching Authorities

### Authority Security Greater Less

Authorities can be searched by security level by defining a security range in the query field and using the **AuthoritySecurityGreaterLess** function.

1. Got to **Main > Authorities > Authorities** - the Authorities screen will display
2. In the Authorities menu, select **Authority > Authority Query**, and select the authority query option (for example: Subject heading) – the table will then close and selected query option will be updated

The screenshot shows a search interface with the title "Subject headings ( 600-699 )". Below the title is a search term field containing a vertical bar "|". To the right of the field is a "Ref:" label and a "Seq Set ? Size" section with values "0 0 200". At the bottom left, the text "Authority Search Term" is visible, and at the bottom right, there is a "NUM" button.

3. Type in security range in the query field separated by comma (for example: 0,50)

The screenshot shows the same search interface as above, but the search term field now contains "0,50". The "Ref:" label and "Seq Set ? Size" section remain the same, showing "0 0 200". The "Authority Search Term" label and "NUM" button are also present.

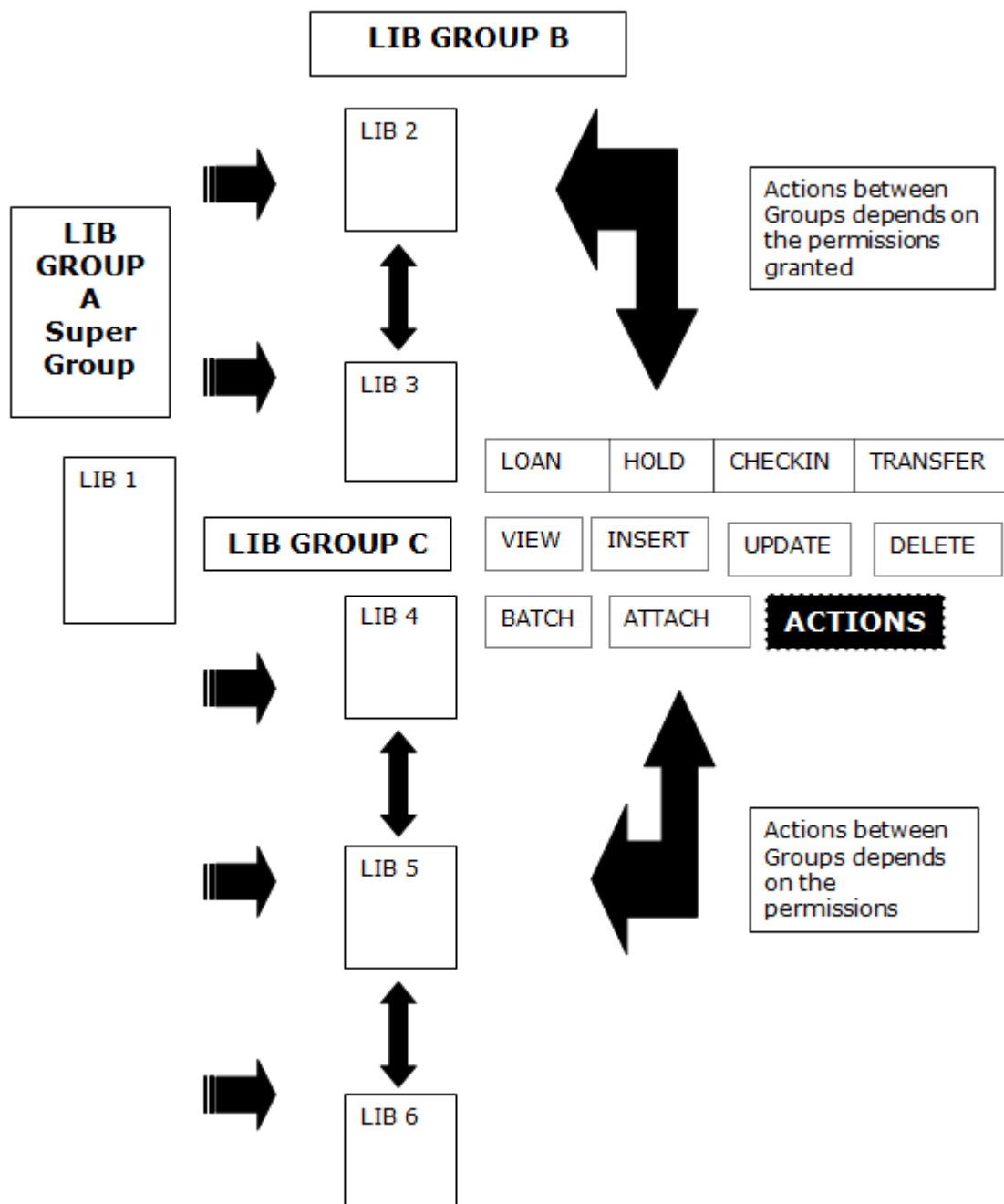
4. In the Authorities menu, select **Authority > AuthoritySecurityGreaterLess**, a search on authority using the security level defined is initiated – a Authority List will display:

The screenshot shows a window titled "Authority List - 200 rows" with a menu bar (Main, Table, XReferences, File) and a table of authority records. The table has columns for Seq, Authority, Cat, Note, Tag, and Operator. The first row is highlighted in purple, and the rest are green.

| Seq | Authority             | Cat | Note | Tag | Operator |
|-----|-----------------------|-----|------|-----|----------|
| 1   |                       | 1   | N    | 20  | TREVOR   |
| 2   |                       | 1   | N    | 20  | TREVOR   |
| 3   |                       | 1   | N    | 20  | TREVOR   |
| 4   |                       | 0   | N    | 100 | CATE     |
| 5   |                       | 0   | N    | 100 | CATE     |
| 6   |                       | 1   | N    | 100 | CATE     |
| 7   | 0                     | 5   | N    | 906 | TREVOR   |
| 8   | 100 greatest batsmen. | 1   | N    | 740 | TREVOR   |
| 9   | 0000-0019             | 1   |      | 22  | PETER    |
| 10  | 000000281064          | 1   | N    | 1   | TREVOR   |
| 11  | 000008100661          | 1   | N    | 1   | TREVOR   |
| 12  | 000010946630          | 1   | N    | 1   | TREVOR   |
| 13  | 000013186777          | 1   | N    | 1   | TREVOR   |
| 14  | 000013349486          | 1   | N    | 1   | TREVOR   |
| 15  | 000013818733          | 1   | N    | 1   | TREVOR   |
| 16  | 000014008756          | 1   | N    | 1   | TREVOR   |
| 17  | 000014465721          | 1   | N    | 1   | TREVOR   |
| 18  | 000014514813          | 1   |      | 1   | TREVOR   |
| 19  | 000015011490          | 1   |      | 1   | STAFF    |
| 20  | 000015011556          | 1   | N    | 1   | TREVOR   |
| 21  | 000015038857          | 1   |      | 1   | STAFF    |
| 22  | 000015050624          | 1   | N    | 1   | TREVOR   |
| 23  | 000015069029          | 1   | N    | 1   | TREVOR   |

## APPENDIX A - SAMPLE GROUP SECURITY CONFIGURATION

### Group Security Configuration (A)





## Group Security Configuration (B)

