



Group Security Manual

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GROUP SECURITY - OVERVIEW

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.

Background

In earlier Versions, Library Groups were optional and could be defined and applied to some or all Locations. For current versions of Amlib every Location is allocated a Library Group. If not already defined, a Library Group of '**LIB**' will be created during the Upgrade and allocated against each Location.

To check whether Library Groups are being used in Amlib:

- 1. Launch the Amlib client
- 2. Go to Main > Supervisor> Location

If the Library Group Code column is displayed before the Location Code, the database is using the Library Group Code.

If some Library Groups had been defined for some Locations, the Groups will need to be entered for the remaining Locations. It may be necessary to create an additional Library Group to assign it to all the existing Locations

😂 Locatior Main Lib	ns - STAFF at (raryMenu	Chelsea Lib	rary						
F1 New	F2 Insert	F3 Save	F4 Delete	F5 Query	F6 Print	F7 NetWk	F8 Plans	F9 Hours	
L	ibrary Group Code		Locn Code			Location Description			 •
LIB		BELM Chei		Belmont Lib Chelsea Libr	_				
LIB			TINGS	Chelsea DIY Hastings Lib	гагу				
LIB			CESSING	Home Librar Library Proc					
LIB		STAC TEST	ſ	Stack Test Library					
LIB	ILE	WEB MOB	·····•	Web Mobile Libra	ry				
									 •
									NUM

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

3 Installation - STAFF at Chelsea Library				
Main LibraryMenu Installation				
F3 Save F5 Query				
<u>All</u> <u>B</u> orrower Catalogue <u>C</u> irculation <u>Stockitem</u>	System Other			
DEFAULT				
Description	Value			
Database containing the Amlib Statistics	STATS			
Database containing the Amlib Web Session Data Tables	WEB			
Default attachment security level	0			
Default authority security level	0			
Default catalogue security level	0			
Default search cache size	60			
Default tag security level	0			
Fixed Window offset position fromTop & Left (numeric in the form TTT-LLL)	120-080			
Group Restrictions? (Y/N)	N			
Group Supervisor	LIB			
If price includes tax, the tax is removed before depr and recalc after	Y			
Item cost on new financial entry to (C)Charge(P)Paid(B)Both(N)None	С			
Play a sound when a notepad message is received? (Y/N).				
Read only cache (Y/N)	N			
Read only OPAC (Y/N)	Υ -			
	NUM			

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

lew F2 Insert F3 Save F4	Delete F5 Query	F6 Print		
Give To Group	Action	Table	Give From Group	
MOBILE	View	Borrowers	LIBRARY	
MOBILE	View	Catalogue	LIBRARY	
MOBILE	Attach	Documents	LIBRARY	
MOBILE	View	Documents	LIBRARY	
MOBILE	Update	Orders	LIBRARY	
MOBILE	View	Orders	LIBRARY	
MOBILE	View	Periodicals	LIBRARY	

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

Periodical									
F1 Clear	F2 Insert	F3 Update	F4 Delete	5 Query	F6 Table	F7 << 1	8 < F9 >	F10 >>	
Title:				ISSN:		Lib Gro Form	up: 0 Stats Code D	▼ efault Call No	_
Supplier: Brief Holdings Statement					×	Retain Freq	Cat Ref Except ie SU	Circ List JNDAY, MARCH	
	Issue Date	- Desc	- All Coj	pies	Received	OverDue	Future Copie	Ref:	
-Copies L	Locn	Issue Details	Bar Code or R for received	Date Received	Claim Comme Instructi		Likely Date	Cost Cal Numi	
									Li
									Lil Gi

selections

SUMMARY OF RELEVANT FUNCTION

Supervisor	Group / Locations enhancements enable sub-groups of Libraries to be grouped
32	together for security and viewing options.
	Different Installation Parameters based on Locations
	 Ability to set Loan Parameters based on Locations or Groups in Installation, Circulation
	Level of Security at User Name Level (1-100)
	Option to turn Group Security On/Off
	Group Security Permissions
	Setting of actual Groups
Authority	Security Level for Tasks
s:	Default Security Level is set in Supervisor, Installation – Attachment, New Authority, Tag Security Levels
	Searches of Authorities based on Groups (Select ALL Groups, Select Query Group(s), Select only My Own Group)
Borrower	Searches of Borrowers based on Groups (Select ALL Groups, Select Query Group(s), Select only My Own Group)
	Borrower Type Loans settings can be based on Groups or Locations
Catalogue	Security Level for Tasks
12	Default Security Level is set in Supervisor, Installation – New Catalogue Security Level (Select ALL Groups, Select Query Group(s), Select only My Own Group)
	Searches of Catalogues based on Groups
Circulation	Only able to Circulate based on Group Security
V	View items/patrons based on Group Security
Periodicals	View Periodicals based on Groups (Select ALL Groups, Select Query Group(s), Select only My Own Group)
Reports	Access to Reports based on Groups High
Stock item	 Searches of Items based on Groups (Select ALL Groups, Select Query Group(s), Select only My Own Group)

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:

	Signature Contract Co											
-	F1 New F2 Insert F3 Save F4 Delete F5 Query F6 Print											
		Library Group	Return Status If set to Y - items returned at a group momber will be pro-	For a return of an item that belongs to a locn within the ourset group	Allow Non Group Return							
			at a group member will have temp Locn set to this group name	within the current group Do you want a message ?	for Items not belonging to group are disallowed Unless Issued by a group mem							
	E	EN	Y	Y	Y							
	C)	Y	Y	Y							
		NS	N	Y	N							

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

Note: If setting Library Groups to populated Library Groups for Locations, the following are suggested settings:

- a. Library Group LIB
- b. Return Status N
- c. Do you want a message Y
- d. Allow Non Group Return Y

Return to the Supervisor, Locations screen and assign the Library Group **LIB** for all Locations with a blank Library Group.

	ocatio Librar	ns - STAFF yMenu	at Eastvi	lle							
F1	New	F2 Insert	F3 Save	F4 Delete	F5 Query	F6 Print	F7 NetWk	F8 Plans	F9 Hours		
	Li	brary Group Code	ı	Locn Code			Location Descriptior	1		 	
	EN		EAS		Eastville						
	EN		ELH		Eastville LH						
	EN		NOF		Northbay						
	EN		WK		WORKROOM	1 - ASK STA	VFF			 	
	0				armada					 	
	0		СОТ		Cotts - ch					 	
	WS		SOL		Southtown					 	
	WS		WEE		Web					 	
	WS		WES		Westway					 	
	WS		WLI	1	Westway LH	1				 	
	<u> </u>		1							 	×
											NUM

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:
 - <u>Group Restriction? (Y/N)</u> = Y
 - <u>Group Supervisor = LIB</u>
- 4. Click on the F3 Save button
- 5. Exit and restart *Amlib* client

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

😹 Installation - STAFF at Chelsea Library	
Main LibraryMenu Installation	
F3 Save F5 Query	
<u>All</u> <u>B</u> orrower <u>Catalogue</u> <u>Circulation</u> <u>Stockiter</u>	m Syste <u>m O</u> ther
DEFAULT	
Description	Value
Default search cache size	60
Default tag security level	0
Fixed Window offset position fromTop & Left (numeric in the form TTT-LLL)	120-080
Group Restrictions? (Y/N)	N
Group Supervisor	LIB
If price includes tax, the tax is removed before depr and recalc after	Y
Item cost on new financial entry to (C)Charge(P)Paid(B)Both(N)None	С
Play a sound when a notepad message is received? (Y/N).	
Read only cache (Y/N)	N
Read only OPAC (Y/N)	Y
System supplied Receipt No (Y/N)	Υ
Use double entry accounting (Y/N)	Υ
Use global memory to reduce network traffic	Y
Use Windows authentication for database connections (SQL Server only)? (Y/N)	N
	CAPS NUM

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:

	r ary Group Per LibraryMenu	rmits - STAFF at	t Eastville					
F1 N	ew F2 Insert	F3 Save F4 D)elete F5 Quer	ry	F6 Print			
	Give T	fo Group	Action		Table	Give From Group		
→	0			-	l			
	WS		View Insert	^	Items	EN		
	ws		Update		Borrowers	EN	 Scro	oll down to
	WS		Delete Batch	=	Items	EN	 see	full list of
			Attach	=				
			Hold Loan		-		 Act	ions:
			Checkin					
			Transfer	~			 •	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:

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:	Borrowers
	Authority, Borrowers, Catalogue, Catalogue Tags, Items, Periodicals, Documents or Orders	
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	0

*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.

New	F2 Insert F3 Save	F4 Delete	F5 Query	F6 Print		
	Give To Group		Action	Table	Give From Group	~
W	EST	Inse	ert	Authority	EAST	
w	EST	Upd	ate	Authority	EAST	
w	EST	Vie	N	Authority	EAST	
W	EST	Atta		Borrowers	EASI	
W	EST	Inse		Borrowers	EAST	
W	EST	Upd		Borrowers	EAST	
W	EST	Bat	ch	Borrowers	EAST	
W	EST	Atta		Borrowers	EAST	
W	EST	Hole		Borrowers	EAST	
W	EST		ckin	Borrowers	EAST	
W	EST		nsfer	Borrowers	EAST	
W	EST	Ren	ate 🞽	Borrowers	EAST	
w	EST	Vie	N	Borrowers	EAST	
w	EST	Atta	ich	Catalogue	EAST	
w	EST	Bat	ch	Catalogue	EAST	
w	EST	Dele	ete	Catalogue	EAST	
W	EST	Inse	ert	Catalogue	EAST	
w	EST	Upd	ate	Catalogue	EAST	
w	EST	Vie	N	Catalogue	EAST	V

6. 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.

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Actions

The Actions that can be permitted include:

ACTION	EXPLANATION	EXAMPLE
View	Search, Report and display	View Borrower details
Insert	Add new	Create new Borrowers
Update	Modify and Save	Change Borrower details
Delete	Remove from the Database	Delete Borrowers
Batch	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
Attach	Attach Images or Documents	Attach photos to Borrower
Hold	Ability to reserve items	Reserve items for Borrowers
Loan	Use Circulation	Loan items to Borrowers
CheckIn	Use Returns	Return items from Borrowers
Transfer	Use Transfer to change Permanent and/or Temporary Locations of items	Transfer items between Branches
Renew	Ability to Renew items currently on loan	Renew only items from certain Groups

Tables

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

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

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

ew	F2 Insert	F3 Save	F4 Delete	F5 Query	F6 Print	F7 NetWk	F8 Choose		
	ι	lser Name			sword isible)		Location	Circ at this Location Only (Y/N)	Level
1	ANNE					EAS		N	96
(CATNET				١	EAS		N	92
(CHRIS				\	EAS		N	100
1	DEBBIE					WES		N	100
(GAYE					EAS		N	100
J	IOHN					EAS		N	100
J	IOLA					EAS		N	100
L	OANS					EAS		Y	93
5	SAM					NOR		N	100
9	SIMON					EAS		N	100
5	STAFF					EAS		N	93
1	гом					\ sou		N	100
						1			
						1			
						N			~
									NUM
								Lo	cation
								Lik	orary Gi
								Lo	gin

CATALOGUE & AUTHORITY

An Owning Library and Security Groups are applied to:

Authority	Α
Catalogue	С
Non Authority Tags	Т
Image & Documents attached	D

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:

APPLICATION	PERMISSION NEEDED
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:

Authorities - STAFF at Hastings Library
F1 Clear F2 Insert F3 Update F4 Delete F5 Query F6 Table F7 < F8 < F9 > F10 >>
Subject - Topical term Image War stories. Image WAR STORIES Actual DB
Key Security 0 Group LIBRARY Tag No 650 Ind 1 Ind 2 TREVOR 16/01/1996 1:44:15
Sub Data a War stories. a War stories. b Data c Data c Data c Data Add Sf Insert Delete Format Insert Note Hide
Any Authority Ref: 4260 WAR Seq Set ?Size 8 37 300 Authority Search Term

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

Select Group(s)
Group
LIBRARYA
→ MOBILE
Hold Ctrl for Multiple selections
Clear
J
OK Cancel

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

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-	- STAFF at Hasti ation Authorit	-		3)					
F1 Clear	F2 Insert F3	Update	F4 Delete	F5 Query	F6 Table	F7 << F8 <		F9 >	F10 >>
War stor								J. Audio	Image
WAR ST							÷	K	alDB Key -3 -4 -5
Security Tag No	0 Grou 650 Ind 1	-	Ind 2		STAFF	Previous Qu 06/09/20	eries	-1 -2	-3 -4 -5
Sub a V	Var stories.			Data					Add Sf
									Delete
									Format Insert Note
								-	Hide
Any Auth	ority					Ref: 4260		Seq Se 8 3	t?Size 37 300
, Authority Indic	ator 2								

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 <u>Authority</u> and <u>Non Authority</u> 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:

-			elsea Library talogue XReferences File			
Clear	Dupl	icate	F3 Update F4 Delete F5 Query F6 Table F7 <	>	F1	0 >>
	eauty	ele	0-1878. ctronic resource] / Anna Sewell. ershire, England] : W.F. Howes Ltd. ; [Prince Frederick, Md.] : [Distribut	ed bː	Au	
ecurity pac Viev	0 v Res		Ibroup Ibroup<	-5		/08/2012 4:29:20 /08/2012 4:29:20
Tag	1	2	Data	AGro	*	
500			"First published in 1877."			Î I
520			A horse in nineteenth-century England recounts his experiences with both			Insert
521			8 years and up.			insert
650		0	Horses	LIBR		Replace
650		0	Horses	LIBR		Modify
655		4	Downloadable audio books.			
700	1		Gibson, Flo.	LIBR		Delete
856	4	0	http://victoriapark.oneclickdigital.eu/Products/ProductDetail.aspx?skuid=26	LIBR	-	Hide
•				4		
	S.Ke	vwo	rd) Ref: 41571	Seq	Set	?Size
Subject (,			
Subject (4	24	200

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

Select Group(s)	х
Group	
LIBRARYA	
→ MOBILE	
	J
Hold Ctrl for Multiple selections	
Clear	
Cieal	
	_
OK Cancel	
Califer	

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

	Duplicat	F3 Update F4 Delete F5 Query F6 Table F7 <	F9 >	F10 >>
	uty [e	20-1878. ectronic resource] / Anna Sewell. ershire, England] : W.F. Howes Ltd. ; [Prince Frederick, Md.] : [Dist	ributed b <u>;</u>	Audio Image
ecurity bac View		Group MOBILE	PETER PETER	14/08/2012 4:29:2 14/08/2012 4:29:2
Tag	1 2	Data	AGro	*
500		"First published in 1877."		Û Į
520		A horse in nineteenth-century England recounts his experiences with	both (Incent
521		8 years and up.		Insert
	0	Horses	LIBR	Replace
650	0	Horses	LIBR	Modify
650 650		Downloadable audio books.		
	4			Delete
650	4	Gibson, Flo.	LIBR	
650 655	4 1 4 0	Gibson, Flo. http://victoriapark.oneclickdigital.eu/Products/ProductDetail.aspx?sku		
650 655 700	1			
650 655 700 856	1 4 0	http://victoriapark.oneclickdigital.eu/Products/ProductDetail.aspx?sku		

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.

👯 P	atron Detai	ils - STAF	F at Library								
<u>M</u> ain	Application	<u>B</u> orrower	XReferences	Eile							
	F1 Clear	F2 Insert	F3 Update	F4 Delete	F5 Query	F6 Table	F7 <<	F8 <	F9 >	F10 >>	
	BarCode			Pin		Prev	ious Querie	s -1	-2 -3	-4	-5
	Scope	'SL'				Give	n Name		Middle	Name	
<u>ب</u> ا	Surname										
	Title			s	ex 🗌	Balance:		Pi	cture		

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 <u>Borrower</u> menu, select **Borrower**> **SelectQueryGroup(s)** the <u>Select Group(s)</u> screen will display
- 4. Highlight to select group required in the Search 'Scope'

Select Group(s)
Group
LIBRARY
MOBILE
Hold Ctrl for Multiple selections
Clear
]
OK Cancel

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'

	tails - STAFF at Chelsea Library tion Borrower XReferences File					- • •
F1 Clear	F2 Insert F3 Update F4 Delete	F5 Query	F6 Table	F7 <<	F8 < F9	> F10 >>
BarCode	Piu		Previo	us Querie	s -1 -2	-3 -4 -5
Scope	'LIBRARY','MOBILE'		Given N	lame	M	iddle Name
Surname	Ī		ļ			
Title		Sex 🗌	Balance:		Picture	
BirthDate	<=>		Potential Charge	s?	AlwaysShow	
Туре	Group		Class			
Status						
Status Date						
Location						
	Business Phone		ID			Loan Memo
Ref1		Ref2	<u> </u>		_	Count
Email				Use for I	lotices	0 0
Mobile/Cell		Use Mobile/(Cell for Notices	Lib.	Group :	
Excl	lude from Debt Collection			Enc	quiry Security L	_evel (00-99)
Joined	At		Modified			Seq Set ?Size
Reg Exp.	Last Active		by			0 0 200
						NUM

Note:

- Selection will remains 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 Searche	S	View				
Saved Where Se	earches	View				
Borrower	Inserting New Borrowers	View, Insert and Update				
Maintenance	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 Transa	action	View & Update				
Loan Parameter	rs	View for Lookup				
		Update for modifications				

STOCKITEM

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
- From the <u>Stockitem</u> menu, select Item> SelectQueryGroup(s) the <u>Select Group(s)</u> screen will display
- 4. Highlight to select group required in the Search 'Scope'

Select Group(s)
Group
LIBRARYA
MOBILE
Hold Ctrl for Multiple selections
Clear
<u>]</u>
OK Cancel

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'

	FF at Chelsea Library						
Main Application	Item XReferences	; File					
F1 Clear F2 II	nsert F3 Update	F4 Delete F	5 Query F6 Tabl	e F7 <<	F8 <	F9 > F10	>>
Item No		Са	t Ref No	01	y Via tem Cat	• Keyword	Any
Title							
Author							
Publisher							
Series/ISBN				Vol		Ed	
Subject							
Call Number			Sts C	ode	Form	Call Set	
Description				Copy No / Co	onvert		
Location		T		Floor	J		
Perm		Temp		FIOOT		Origin/Source	e
For Loan (Y/N)	Loan Type	Opac?	Alert	Process			
Received			Accessioned		Current	t Cost	
Group	LIBRARY','MOBILE	· · · ·					
ILL Library:	I	LL Ren:	ILL Due:		ITEM TYPE:	МЕМО	S: 0
On Loan		Due		On Order	Res	Seq Set	
Last Modified	l .	by			Issues 0	0 0	200
AMLIB CATALOGUE	IDENTIFIER						NUM

Note:

- Selection will remains 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 Searche	S	View				
Saved Where Se	earches	View				
Stockitem	Inserting New Item	View, Insert and Update				
Maintenance	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				

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 <u>Lib Group</u> drop down box.

-		FF at Chelsea Library									×		
		n Transactions XRefere								1		_	Library
F1 Clear	F	F3 Update	F4 Delete F	5 Query	F6 Tal		F7 << F8	< F9>	F10 >>				Group
Title:	Au	stralian Personal Comput	er				Lib Group	1		•			Drop Down
Prev Title	e:			ISSN:	07254	115	Stats Code	Form [Default Ca	all No	_		Box to
Curr Suppl	lier: D	M Dyn	nocks Bookshop						_				
Bri		rrent 3 years on shelf. Pre	vious in stack			<u>~</u>	Retain 25	С	at Ref 🛛	4484	_		select
Holding Statemer						-	Frequency M	1	Re	ef: 66			other
Sort .			1		1			Subs –			_		groups
By: Issu	ie Date	Desc All Copi		OverDue			L	d Group	LIBRARY		_	l	
	Loo	n Issue Details	Bar Code or R for received	Date Received	Claim	Comment Instruction		Likely Date	Cost	Call Numb			
Сору	CH	EL Australian Personal Computer December			Ν	Copy 1	12/12/1998	12/12/1998	\$4.57	PER			
Paste	СН	EL Australian Personal Computer November			N	Copy 1	12/11/1998	12/11/1998	\$4.57	PER			
Update	СН	EL Australian Personal Computer October			N	Сору 1	12/10/1998	12/10/1998	\$4.57	PER			
Delete	СН	EL September 1998	·	•	Ν	To Branch	12/09/1998	12/09/1998	\$4.57	PER			
Print	СН	EL August 1998			N	To Branch	12/08/1998	12/08/1998	\$4.57	PER			
	•									•	-		
Title										NUM			

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

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.

	er - STAFF at Che ation Orders 1	-	XReference	ec.									×
F1 Clear			Delete	_	5 Quer	y	F6 Table	F7 <	< F	B <	F9 > F1	10 >>	
Order No:	???????????	(AMR	EF1)		Or	der Gr	oup:		_ L	ib Grou			-
Summary: Supplier:		(AMREF2) Invoiced: 0											
	Supplier's Refe	rence							(E)	(TREF1)	Orde	red: 0	
Forex Code:	AUD	Forex R	ate: 1.0	000			Forex Date	e: 01/01/199	95 F	orexAm	ount:	AU\$(0.00
Date Placed:	17/09/2012	Date Expec	ted:				Date Printeo	t:	L	ocal Am	ount:	AU\$(0.00
Туре:	NORM	Condi	tion: NC	DRM			Date to Clai	m:	S	tatus:	PE	ENDING	
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	ltem Stats	Account	Alloc.	^
<u> </u>		<u> </u>			<u>.</u>							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

≍ ₿In:	stallation - S	TAFF at AmlibNet Lib	rary					
Main	LibraryMenu	Installation						
		F3 Save	F5 Qu	егу				
	ĀII	Borrower	Ca <u>t</u> alogue	<u>C</u> irculation	<u>S</u> tockitem	Syste <u>m</u>	Other	
				DEFAULT				

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 – <u>Installation</u> window.

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

Code	Details	Group
DEFAU	LT DEFAULT	
ARM	Armadale	EAST
С	Council library	EAST
EAS	Eastville	EAST
EAST	EAST	EAST
INET	Inet	LG
KMS	Kelmscott	LG
KWS	Kelmscott extra	LN
LIB	AmlibNet Library	LG
LW	LW	LW
LWST	Lower West	LW

- 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 <u>Advance</u> <u>Parameter Copy</u> screen will display

nced Pa	rameter Copy	
	F5 Query F6 Copy	
opy Opt		
pp op	013	
Parame	ter Set Catalogue Source Location	DEFAULT
_		
Сору	Description	Value
_	Allow Catalogues to be restricted from viewing in NetOpacs (Y/N)	Y
	Allow tags to be sequenced anywhere within a Catalogue (Y/N) Automatically 'Show' the Catalogue details after a search (Y/N)	Y
	Automatically Show the Catalogue details after a search (Y/N) Automatically 'Tick' the Worksheet button in Catalogue Create (Y/N)	Y
	Catalogue deletion level (1-4) (1=least severe,, 4=most severe)	1
	Default for catalogue Opac Restrict (Y/N)	N
	Display Tag Description in Catalogue instead of Tag No	N
	Enter % to adjust price of item on Marc Import (eq 10 = +10%)	0.00
Π	Only match an AOL if the incoming record has the same location	Y
	tion Location(s) Varn when copying blank parameters	Select All Select Non
Сору	Art Department	
	Belmont Library	
		-1
	Chelsea Diy Module Select All	
Г	Hastings Library	-1
	Home Library Service	le
		Do

- 4. Select Parameter Set and Source Location
 - a. In the <u>Parameter Set</u> dropdown, select the area specific to the installation parameters you wish to copy, or select 'All'
 - b. In the <u>Source Location</u> 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

Сору	Description	Value	
	Allow Catalogues to be restricted from viewing in NetOpacs (Y/N)	Y	
	Now tags to be sequenced anywhere within a Catalogue (Y/N)	Ŷ	
	utomatically 'Show' the Catalogue details after a search (Y/N)	Y	
	utomatically 'Tick' the Worksheet button in Catalogue Create (Y/N)	Y	
	Catalogue deletion level (1-4) (1=least severe,, 4=most severe)	1	
	Default for catalogue Opac Restrict (Y/N)	N	
	Display Tag Description in Catalogue instead of Tag No	N	
	Enter % to adjust price of item on Marc Import (eg 10 = +10%)	0.00	
	Dnlv match an AOL if the incoming record has the same location	Y	*

6. In the <u>Destination Location(s)</u> 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.

ew	F2 Insert	F3 Save	F4 Delete	F5 Query	F6 Print	F7 NetWk F8 Choose	F9 Passwd		
		User I	Name			Location	Circ at th Location C (Y/N)		ć
	CHRIS				HASTING	3	N	100	
	CIRC				CHELSEA		N	100	
	DIY1				CHEL SEA		N	91	
	FIONA				BELMONT		N	90	
	JOHN				CHELSEA		N	100	
	NETOPACS				WEB		N	100	
	OPAC1				CHELSEA		N	91	
	STAFF				CHELSEA		N	100	
	TARA				CHELSEA		N	100	
	TREVOR				HASTING	5	N	100	
									_

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- <u>Setting Group Permits</u>. 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.
--	---------------------------------------

😂 In	stallation - STAFF at Chelsea Library	
Mair	LibraryMenu Installation	
	F3 Save F5 Query	
	<u>All</u> <u>B</u> orrower Catalogue <u>C</u> irculation <u>S</u> tockiten	n Syste <u>m O</u> ther
_	DEFAULT	
	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)II	Α
		NUM

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 <u>SMTP Parameters by Location</u> 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
Example	Hasting	RepCirculation	Continuous (E-Mail)	library@oclc.org	manager@oclc.org
Comments	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 form 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

New	F2 Insert	F3 Save F4 Delete	F5 Query F6 Print			
	Location	Report Screen	Report Type	Sender's Email	Carbon Copy Email	
H/	ASTINGS	RepCirculation	Continuous (E-Mail)	library@oclc.org	manager@oclc.org	
				1		
-				-		
				-		
				+		

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 <u>Catalogue & Authority</u> section of this guide.

Import	X
	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
	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
	All the imported records can be placed into a Saved File. Use the 'Browse' button to choose a Saved File.
	Z39.50 import 14/09 LI Browse
	OK Cancel

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.

Marc Details	Litem Defaults
We think the file contains	Please specify default values for each item in the fields below
Total Bibliographic records 150	Form BK
Total Authority records	Location EAS
Each bibliographic record contains:	Lib Group EN
C <u>C</u> ataloque data oniv	SUM aho' stet?
Ful Marc Import - Bibliographic Option	s 🛛 🔀
C Bri Vou cannot create catalogues w	ith a higher security level than your level of 93.
When di	ок
• All L_	MIII. THEE OF AIT LETT \$ \$ 0.00
○ Only tags defined in Amlib	Appreciate items by 0.00%
New Catalogue Security Level 95	Depreciate old stockitems

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	
<u>A</u> ll <u>B</u> orrower <u>Catalogue</u> <u>Circulation</u> <u>Stockitem</u>	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
Default attachment security level	0
Default authority security level	0
Default catalogue security level	0
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 <u>User Security Levels</u> 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
- 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

Subject headings (600-699)	Ref:	Seq \$ 0	Set ?s	Size 200	
Authority Search Term				NUM	

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

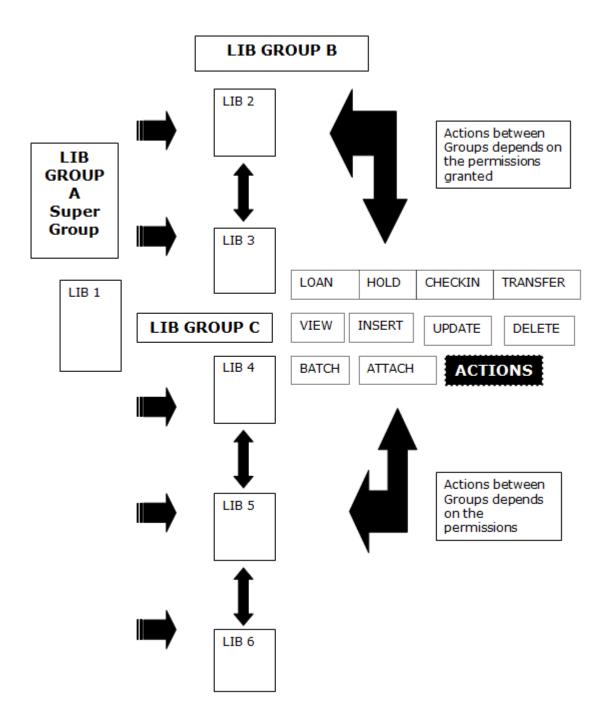
Subject headings (600-699)	Ref:	Seq 3	Set?s	iize
0,50		0	0	200
Authority Search Term				NUM

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

Ma	in Table XReferences File					
Seq	Authority	Cat	Note	Tag	Operator	
1		1	N	20	TREVOR	
2		1	Ν	20	TREVOR	
3		1	Ν	20	TREVOR	
4		0	Ν	100	CATE	
5		0	Ν	100	CATE	
6		1	Ν	100	CATE	
7	0	5	Ν	906	TREVOR	
8	100 greatest batsmen.	1	Ν	740	TREVOR	
9	0000-0019	1		22	PETER	
10	00000281064	1	Ν	1	TREVOR	
11	000008100661	1	Ν	1	TREVOR	
12	000010946630	1	Ν	1	TREVOR	
13	000013186777	1	Ν	1	TREVOR	
14	000013349486	1	Ν	1	TREVOR	
15	000013818733	1	Ν	1	TREVOR	
16	000014008756	1	Ν	1	TREVOR	
17	000014465721	1	N	1	TREVOR	
18	000014514813	1		1	TREVOR	
19	000015011490	1		1	STAFF	
20	000015011556	1	Ν	1	TREVOR	
21	000015038857	1		1	STAFF	
22	000015050624	1	Ν	1	TREVOR	
23	000015069029	1	N	1	TREVOR	

APPENDIX A - SAMPLE GROUP SECURITY CONFIGURATION

Group Security Configuration (A)



Group Security Configuration (B)

