Learn how to view, create, and edit usernames in Amlib. Also find information about resetting user passwords, user permissions and disabling or enabling access to modules.

Creating new usernames

It is possible to create user-specific logins for the Amlib client which can then be configured to allow access to only certain modules, screens, menu items and buttons.

View existing usernames

1. Launch the Amlib client
2. Go to Main > Supervisor > UserNames – the User Names table will display:

3. A list of existing User Names will be visible with the following settings:

<table>
<thead>
<tr>
<th>FIELD</th>
<th>EXPLANATION</th>
</tr>
</thead>
<tbody>
<tr>
<td>User Name</td>
<td>This is the User Name used when logging onto the Amlib client</td>
</tr>
<tr>
<td>FIELD</td>
<td>EXPLANATION</td>
</tr>
<tr>
<td>-------------------------------------------</td>
<td>-----------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------</td>
</tr>
<tr>
<td>Location</td>
<td>The default location that displays when the User logs into the Amlib client (the user may select a different location)</td>
</tr>
<tr>
<td>Y</td>
<td>This is the User Name used when logging onto the Amlib client</td>
</tr>
<tr>
<td>Circ at this Location Only (Y/N)</td>
<td>The default location that displays when the User logs into the Amlib client (the user may select a different location)</td>
</tr>
<tr>
<td>N</td>
<td>The default location that displays when the User logs into the Amlib client (the user may select a different location)</td>
</tr>
<tr>
<td>Level</td>
<td>An indication of the user’s permissions levels setup. Some of the tasks on the system can also be limited using User Level (for example: Attachment security level, default Authority security level, etc), although it is rarely used.</td>
</tr>
<tr>
<td></td>
<td>An indication of the user’s permissions levels setup. In older versions some of the tasks on the system could also be limited using User Level (for example: Attachment security level, default Authority security level, etc), although it is rarely used. Thus is no longer an indication in versions 5.3 onwards.</td>
</tr>
</tbody>
</table>

**Enter a New User**

1. Click the **F1 New** or **F2 Insert** button – a new entry will appear in the table
2. Type in the following:
   1. User Name – use one word only (for example: **CHRIS** or **CHRISW**)
   2. Location – the default login location of the user
   3. Circ at this Location Only – **Y** or **N**
   4. Level – the level against a User is used only as a guide
1. Click the **F3 Save** button – the Operator Password screen will display:

![Operator Password Screen]

1. Type in a Password and Confirm Password
2. Click the **OK** button when complete
3. Close and restart the **Amlib** client to allow the new User Name to come into effect

**Resetting User Passwords**

1. Launch the **Amlib** client
2. Go to **Main > Supervisor > UserNames** – the User Names table will display
3. Highlight the User Name in the table
4. Click the **F9 Passwd** button – the Operator Password screen will display:

![Operator Password Screen]

1. Type in the new Password and Confirm Password
2. Click the **OK** button when complete
3. Click the **F3 Save** button
4. Close and restart the *Amlib* client to allow the new Password to come into effect

*Please Note:* If the **F9 Passwd** button is not visible – the button will have to be activated for the User who is resetting the password (see below).

**User permissions**

*Amlib* client User Names can be configured to allow access to only certain modules, screens, menu items and buttons. Only Users with full Supervisor permissions can edit the permissions for other Users.

**View existing user permissions**

1. Launch the *Amlib* client
2. Go to **Main > Supervisor > UserNames** – the User Names table will display
3. Highlight a **User Name** in the table – for example: **JOHN**
4. Click the **F8 Choose** button – the User Security screen will display:
Menu options

- **ViewingMenu**: is used to show/hide the buttons that appear on any given screen for the selected User
- **ActualMainMenu**: lists the modules/screens/options available which could possibly be assigned to the selected User
- **CurrentUserMenu**: lists the modules/screens/options actually assigned to the selected User (bold for active, grey for inactive)

When a screen/option is selected from the ActualMainMenu, the **Give** button is used to ENABLE the selection – for example: **MassBorrowerChange**

When a screen/option is selected from the ActualMainMenu, the **Take** button is used to DISABLE the selection – for example: **MassBorrowerChange**

[Menu options](https://help.oclc.org/Library_Management/Amlib/Supervisor/Usernames)
When a screen/option is selected from the ActualMainMenu, the **green Title** button is used to ENABLE access to the module as a whole – for example: Borrower module

When a screen/option is selected from the ActualMainMenu, the **red Title** button is used to DISABLE access to the module as a whole – for example: Borrower module

- If access to certain Titles (modules) is DISABLED, the selected User will see fewer icons on the Top Bar once they log in (the module names will also be greyed out):

![Module Icons](https://help.oclc.org/Library_Management/Amlib/Supervisor/Usernames)

**Enabling a single username permission**

1. Go to **Main > Supervisor > UserNames** – the User Names table will display:
2. Highlight the **User Name** you would like to grant a permission to and click the **F8 Choose** button – the User Security screen will display.

3. Navigate to the **CurrentUserMenu** to see the permissions that the user currently has ENABLED (any options that appear in **grey** in the menu are permissions that the user does not currently have):
4. To enable a permission, navigate to the ActualMainMenu and then to the menu option you wish to grant- this example uses Stockitem > Mass Change

![Image of the User Security - STAFF at Chelsea Library interface showing the ActualMainMenu and User Permissions]

5. The chosen menu item will then display in the Menu Chosen box – for example: Stockitems.MassChange

![Image of the User Security - STAFF at Chelsea Library interface showing the Menu Chosen and User Permissions sections]

https://help.oclc.org/Library_Management/Amlib/Supervisor/Usernames
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6. Click the green **Give** button
7. You can then recheck the setting in the CurrentUserMenu to see if it has been ENABLED (it will be **bolded**)
8. Then close out of the window and restart the *Amlib* client for the change to have effect

**Disabling a single username permission**

1. Go to **Main > Supervisor > UserNames** – the User Names table will display:

![User Names table]

2. Highlight the **User Name** you would like to grant a permission to and click the **F8 Choose** button – the User Security screen will display

3. Navigate to the **CurrentUserMenu** to see the permissions that the user currently has ENABLED (any options that appear in **bold** in the menu are permissions that are enabled):

![CurrentUserMenu screenshot]

4. To disable a permission, navigate to the **ActualMainMenu** and then to the menu option you wish to grant- this example uses **Stockitem > Mass Change**
5. The chosen menu item will then display in the Menu Chosen box – for example: **Stockitems.MassChange**
6. Click the red Take button
7. You can then recheck the setting in the CurrentUserMenu to see if it has been DISABLED (it will be greyed out)
8. Then close out of the window and restart the Amlib client for the change to have effect

Enabling access to an entire module

It is possible to control a user’s access to entire module.

1. Go to Main > Supervisor > UserNames – the User Names table will display:

2. Highlight the User Name you would like to grant a permission to and click the F8 Choose button – the User Security screen will display

https://help.oclc.org/Library_Management/Amlib/Supervisor/Usernames
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3. Navigate to the **CurrentUserMenu** to see the permissions that the user currently has – any module names that appear in **grey** in the menu are permissions that the user does not currently have – for example: **Authorities**, **Borrowers** and **Periodicals** amongst others are not permitted for the **CIRC** Username login example below:

![CurrentUserMenu Diagram](image1)

4. To enable a module, navigate to the **ActualMainMenu** and then to the menu option you wish to grant – for example: **Borrowers > Borrower**

![ActualMainMenu Diagram](image2)

5. The chosen menu item will then display in the Menu Chosen box – for example: **Borrowers.Borrower**

![Menu Chosen Box Diagram](image3)
6. Select the green **Give** button and then the green **Title** button

7. Selecting the **Current User Menu** at this stage will show that you have granted access to the Borrower screen only – you still need to add individual menu screen permissions – for example: **History** and **Memos** using the steps outlined above.

8. Then close out of the window and restart the **Amlib** client for the change to have effect.

## Disabling access to an entire module

1. Go to **Main > Supervisor > UserNames** – the User Names table will display:

   ![User Names - STAFF at Chelsea Library](https://help.oclc.org/Library_Management/Amlib/Supervisor/Usernames)

   2. Highlight the **User Name** you would like to grant a permission to and click the **F8 Choose** button – the User Security screen will display.

   3. Navigate to the **CurrentUserMenu** to see the permissions that the user currently has – any module names that appear in **grey** in the menu are permissions that the user does not currently have – for example: **Authorities**, **Borrowers** and **Finance** amongst others are not permitted for the **CIRC** Username login example below:
4. To disable a module, navigate to the `ActualMainMenu` and then to the menu option you wish to remove – for example: `Borrowers > Borrower`

5. The chosen menu item will then display in the `Menu Chosen` box – for example: `Borrowers.Borrower`

6. Select the red `Take` button and then the red `Title` button

7. Selecting the `Current User Menu` at this stage will show that you have disabled access to the Borrower module
8. Then close out of the window and restart the Amlib client for the change to have effect

Enabling/Disabling Buttons

It is possible to show/hide the buttons the user sees on any given screen – this can be used to restrict the user's ability to perform certain tasks – for example: perform updates or delete records

1. Go to Main > Supervisor > UserNames – the User Names table will display:

<table>
<thead>
<tr>
<th>User Name</th>
<th>Location</th>
<th>Circ at this Location Only (Y/N)</th>
<th>Level</th>
</tr>
</thead>
<tbody>
<tr>
<td>CHRIS</td>
<td>HASTINGS</td>
<td>N</td>
<td>100</td>
</tr>
<tr>
<td>CIRC</td>
<td>CHELSEA</td>
<td>N</td>
<td>100</td>
</tr>
<tr>
<td>DIY1</td>
<td>CHELSEADY</td>
<td>Y</td>
<td>1</td>
</tr>
<tr>
<td>FIONA</td>
<td>BELMONT</td>
<td>N</td>
<td>90</td>
</tr>
<tr>
<td>JOHN</td>
<td>CHELSEA</td>
<td>N</td>
<td>100</td>
</tr>
<tr>
<td>NETOPACS</td>
<td>WEB</td>
<td>N</td>
<td>100</td>
</tr>
</tbody>
</table>

2. Highlight the User Name you would like to grant a permission to and click the F8 Choose button – the User Security screen will display:
3. Navigate to the ViewingMenu and then to the menu option you wish to enable/disable buttons for – for example: Borrowers > Borrower – the Borrower buttons menu will display:

The enabled (and therefore visible) buttons will be displayed in **green**, the disabled (and therefore hidden) buttons are in **red**.

4. To enable (show) a button, simply click a **red** button with your mouse – the button will then turn **green** – in the following example, the **DELETE** button has been enabled:

5. Similarly, to disable (hide) a button, simply click a **green** button with your mouse – the button will then turn **red**

6. Then close out of the button menu, the User Security window and restart the Amlib client for the changes to take effect

**Enabling the F9 passwd button on the User Names screen**

1. Go to Main > Supervisor > UserNames – the User Names table will display:
2. Highlight the **User Name** you would like to grant a permission to (this will be the operator who is ALLOWED to reset User passwords) and click the **F8 Choose** button – the User Security screen will display:

3. From the menu, select **ViewingMenu > Supervisor > UserNames** – the Sup_UserNames button menu will display:

The enabled (and therefore visible) buttons will be displayed in **green**, the disabled (and therefore hidden) buttons are in **red**.

4. Click the red **PASSWD** button with your mouse – the button will turn **green**:

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https://help.oclc.org/Library_Management/Amlib/Supervisor/Usernames

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5. Then close out of the button menu, User Security window and restart the *Amlib* client for the changes to take effect.
6. The button will now be visible on the User Names screen when the selected User is logged in.

### Copying permissions from one user to another

It is possible to copy the permissions from another User – for example: copy JOHN’s permissions to CHRIS.

1. Go to **Main > Supervisor > UserNames** – the User Names table will display:

![User Names table](image)

2. Highlight the **User Name** you would like to copy the permissions to (for example: CHRIS) and click the **F8 Choose** button – the User Security screen will display:

![User Security screen](image)

3. Click the **Copy From**… button – a Copy From list will display with all the other Users listed:
4. Highlight the Operator whose permissions you would like to copy – for example: JOHN

5. Then click the Copy button – a prompt with the following message will display: XXXXX now has the same Menu and Button Security as XXXXX.

6. You can review the permissions now enabled for this User by selecting the CurrentUserMenu – bolded selections are enabled, disabled selections are greyed out

7. Then close out of the window and restart the Amlib client for the changes to have effect