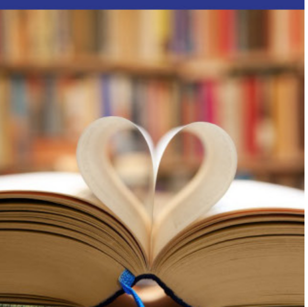
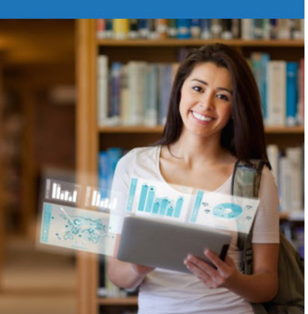
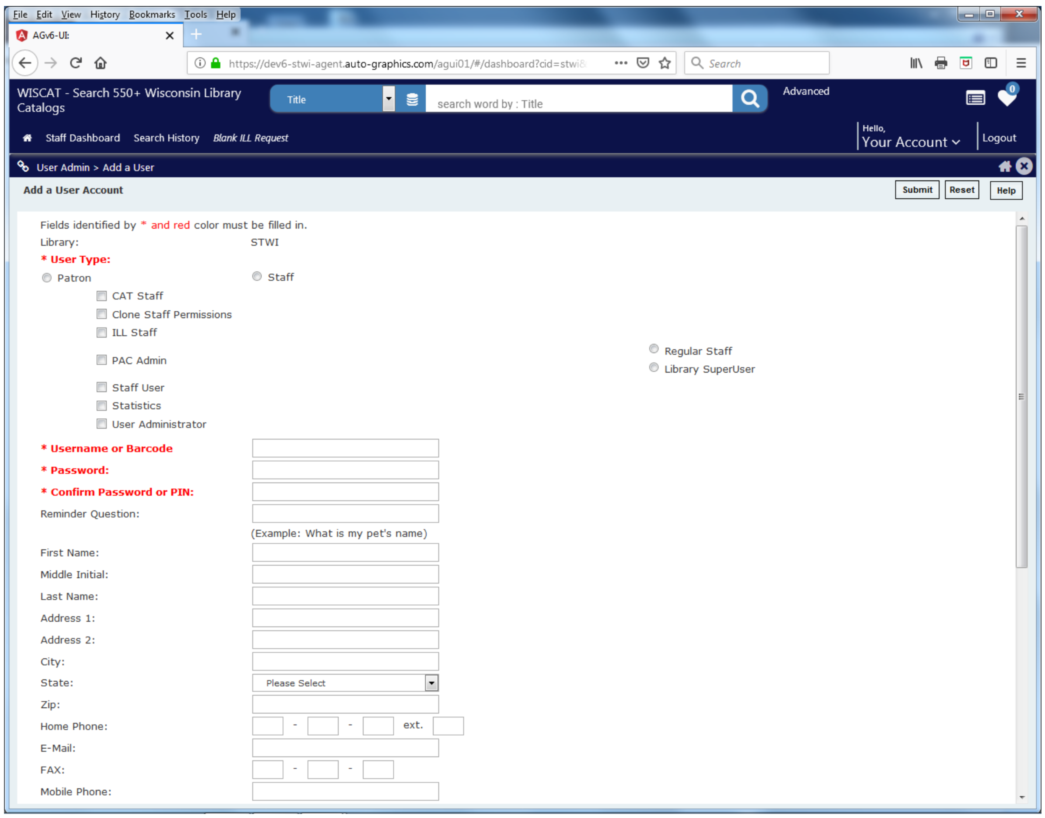




RESEARCHit®
SHAREit®



User Guide

User Administration

Version 6.0

auto-graphics

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Chapter 1. INTRODUCTION

Overview

This User Guide is designed to provide a working understanding of the features and functions of User Administration (for authenticated systems). User Administration is an online application that provides administrative control over your library's database of authenticated users; both library staff and patrons. Using User Administration, you can:

- Add, edit and delete users for your library or consortium
- Generate user reports
- Manage the user database

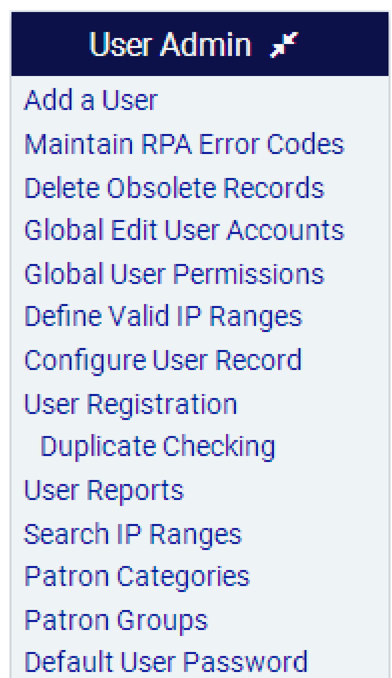
The User Admin Menu

THIS FEATURE IS CURRENTLY UNDERGOING REDESIGN AND MAY NOT FUNCTION AS DESCRIBED. UPDATES WILL BE RELEASED AS AVAILABLE.

The **User Admin** menu provides access to features and functions related to administration of your library's database of authenticated users.

To access the User Admin Menu:

1. Click the **Staff Dashboard** link on *any* screen in the Search interface.
   - The Staff Dashboard screen displays. The Dashboard displays *all* staff menus available for your user account.



User Admin Menu

2. The **User Admin** menu provides access to the following options:

   Depending on the configuration of the system for your library or consortium, some options may not be available.

   - **Add a User** – Lets you add a new authenticated user (patron or staff member) to your library's user database (see ***Adding a User*** on page **9** for details).
   - **Maintain RPA Error Codes** – Lets you define "block" codes (provided by your library's remote ILS) that will prevent patron access to the system (see ***Maintaining RPA Error Codes*** on page **46** for details).
   - **Delete Obsolete Records** – Lets you delete obsolete user records from your library's user database (see ***Deleting Inactive Users*** on page **48** for details).
   - **Edit User Accounts** – Lets you edit or delete an existing user record in your library's user database (see ***Editing User Accounts*** on page **21** for details).
   - **Global Edit User Accounts** – Lets you edit or delete an existing user record for any library within a consortium or collective (see ***Global Edit User Accounts*** on page **51** for details).

*The **Global Edit User Accounts** function is available to Customer SuperUsers only.*

- **Global User Permissions** – Lets you add or delete user permissions for one or more selected users (see ***Global User Permission Maintenance*** on page **28** for details).
- **Define Valid IP Ranges** – Lets you define valid IP ranges for workstations *within your library* through which "generic" patron access to the system will be allowed (see ***Defining Valid IP Ranges*** on page **43** for details).
- **Configure User Record** – Lets you configure the content and arrangement of the *default* user record for your consortium or collective (see ***Configuring the User Record*** on page **53** for details).

  *The **Configure User Record** function is available to Customer SuperUsers only.*

- **User Registration Duplicate Checking** – Aids in minimizing the occurrence of creating more than one user record for a given patron (see ***Configuring User Registration Duplicate Checking*** on page **23** for details).
- **User Reports** – Lets you generate database reports for your library's user database (see ***Generating User Reports*** on page **30** for details).

  *Customer SuperUsers may generate user database reports for any library in a consortium or collective (see **Generating User Reports** on page **54** for details).*

- **Search IP Ranges** – Lets you generate a listing of *all libraries* that have configured a specified IP range as *valid* using the **Define Valid IP Ranges** function (see ***Searching IP Ranges*** on page **56** for details)

  *The **Search IP Ranges** function is available to Customer SuperUsers only.*

- **Patron Categories** – The **Patron Categories** function is associated with the *optional* **ILL Request Limits** feature (see the ***ILL Administration User Guide*** for more information) that lets you create and maintain *one or more* Patron Categories to which patrons may be assigned for the purpose of restricting the number of ILL requests a patron may have active at any given time (see ***Managing Patron Categories*** on page **35** for details).

  *The **ILL Request Limits** feature is optional, and may not be enabled for all systems.*

- **Patron Groups** – The **Patron Groups** function provides an additional level of control over access to specific resources. **Patron Groups** lets you create and maintain *one or more* Patron Groups to which patrons may be assigned (see ***Managing Patron Groups*** on page **36** for details). Once created, access to selected Resources can be restricted, through the PAC Administration module, to *only* those patrons associated with a specified Patron Group (see the ***PAC Administration User Guide*** for more information).
- **Default User Password** – Lets you specify a *default* user password to be applied to all *new* user records (patron and staff) that are created in the User Administration module (see ***Setting the Default User Password*** on page **23** for details).

3. Click the button to return to the Search interface.

Organization of the User Guide

This User Guide is designed to provide an overview of the features and functions of the User Administration module, and includes the detailed procedures to maintain your library's database of authenticated users. The User Guide is divided into three chapters, as follows:

Chapter 1 – Getting Started. This chapter explains how to prepare to use User Administration.

Chapter 2 – Managing Users. This chapter provides the procedures to add, edit and delete authenticated users (library staff or patrons) for your library or consortium, and to generate user reports.

Chapter 3 – Managing the User Database. This chapter provides the procedures to import user records from an external file, to delete obsolete user records from your library's user database, to define valid IP ranges (for IP authenticated systems), to define valid barcode ranges (for access to barcode authenticated databases) and to maintain remote patron authentication (RPA) error codes (for systems utilizing remote patron authentication).

Chapter 4 – Customer SuperUser. This chapter provides procedures specific to Customer SuperUsers to configure the user record, generate user reports for *any library* within a consortium, and search IP ranges.

Optional Features

RESEARCHit and SHAREit are modular in design, and offer libraries a high degree of flexibility in configuring the systems to suit the specific needs of their patrons and staff members. The "basic" RESEARCHit module can be enhanced by adding staff-level functionality to support User Administration and user authentication, PAC Administration, Cataloging and Authority Control, Union Database Management, Statistics, UX Administration and/or ILL Administration (SHAREit).

This manual provides instructions covering all features and functions available through User Administration. Depending on the specific configuration of for your library, some features and functions may not be available to you. For information on enabling optional features and functions for your library, contact Auto-Graphics Sales and Marketing.

Chapter 2. MANAGING USERS

Overview

The User Administration module lets you add, edit or delete authenticated users within your library's database.

This chapter provides the procedures to:

- Add a new authenticated user to the database
- Edit the user account for an existing authenticated user
- Delete an existing authenticated user account
- Generate user reports
- Manage patron categories and patron groups

About Users

The system can be accessed by three types of users: guests, patrons, and library staff.

Guest users are *unauthenticated* users who access your library's system via the Internet from *outside* the library. Guests are generally offered a "limited" set of search resources (see the ***PAC Administration User Guide*** for more information), cannot submit Interlibrary Loan requests, and are not granted access to the "My Account" feature (see the ***Search User Guide*** for more information).

Patron users can be either *unauthenticated* or *authenticated*. **Unauthenticated patrons** are users who access your library's system from an IP-authenticated workstation *inside* the library *without* providing login credentials (**Username or Barcode** and **Password or PIN**). **Authenticated patrons** are users who access your library's system (from either inside *or* outside the library) and provide valid login credentials. Patrons are generally offered an "expanded" set of search resources (see the ***PAC Administration User Guide*** for more information), and *may* be authorized to participate in Interlibrary Loan. Additionally, authenticated patrons are granted access to the "My Account" and "My Preferences" features (see the ***Search User Guide*** for more information).

*Each library is provided with a "generic" patron account. Library staff may log into the system using the "generic" patron account to access the "My Account" and "My Preferences" features to configure several system defaults for unauthenticated users (see the **Search User Guide** for more information). Additionally, the "generic" patron account is used to enable or disable Interlibrary Loan permissions for unauthenticated patrons and to set the default Interlibrary Loan permissions for authenticated patrons (see **Configuring ILL Permissions for Patrons** on page **27** for details).*

Staff users are library staff members who access the system (from either inside *or* outside the library) and provide valid login credentials (**Username or Barcode** and **Password or PIN**). Staff users are granted access to the search interface, and to one or more staff modules (ILL Administration, CAT Administration, etc.). Staff users are also granted access to the "My Account" and "My Preferences" features (see the ***Search User Guide*** for more information).

Adding a User

You can add an authenticated user for your library *only*.

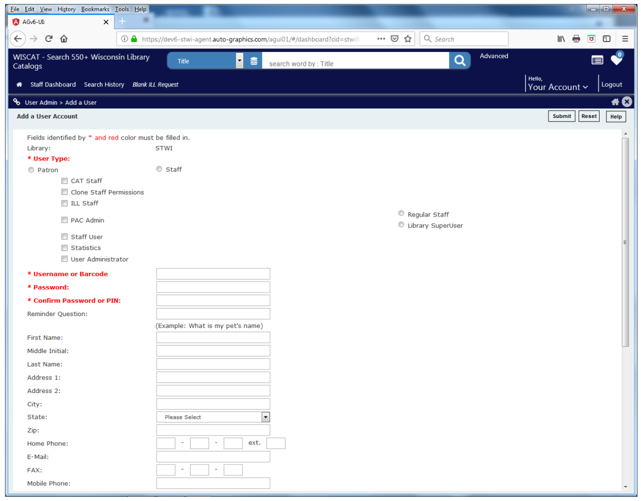
To add a user:

Mandatory fields are shown in red type and indicated by an asterisk ""; all other fields are optional.*

The content and arrangement of the User Record is customer-selectable (see ***Configuring the User Record*** *on page* ***53*** *for details). Depending on the specific configuration of the User Record for your library or consortium, some fields may not be available.*

1. From the **User Admin** menu, select **Add a User**.

   - The Add a User Account screen displays. The **Library** field shows the library code for the library to which the new user account will be added.



Add a User Account Screen

2. Assign the user to *one or more* desired user groups using the **User Type** radio buttons and checkboxes.

   You must assign the user to a user type. If you do not assign the user to a ***User Type****, a dialog displays the message "Please select either a Staff or Patron type" when the record is saved. Click the* ***OK*** *button on the dialog to close the message, and select the desired* ***User Type*** *for the user.*

   - Select *either* the **Patron** *or* the **Staff** radio button.

     - **Patron** – User can access the system as an *authenticated* library patron (see the ***Search User Guide*** for details).

     - **Staff** – User can access the system as an *authenticated* staff member, with access to *one or more* staff modules.

   A user can be either a "patron" or a "staff user". A user cannot be both a "patron" and a "staff user."

   - For **Staff** users, use the **User Type** checkboxes and radio buttons to select *one or more* staff modes to which the user will be granted access. Descriptions of staff modes are provided below.

     If desired, you can use the ***Clone Staff Permissions*** *function to clone staff modes and permissions from an existing user to a new user (see* ***Cloning Staff Permissions*** *on page* ***13*** *for details).*

Staff User Types

Mode	Description
CAT Staff	User can access all functions within the CAT Administration module (see the ***CAT Administration User Guide*** for details). *If your library has purchased the optional AGCat module, the user's AGCat permissions are set to* ***Cannot Update Bib*** *and* ***Cannot Update HLD*** *by default. When you save the record, you are given the opportunity to modify the user's AGCat permissions (see* ***Modifying AGCat Permissions*** *on page* ***16*** *for details).*
Regional Superuser	User can perform various functions throughout the system for *one or more* libraries associated with their User Account (When **Regional Superuser** is selected, user is *automatically* assigned to the **User Administrator** User Type when the User Record is saved.) *The* ***Regional Superuser*** *User Type is available only when accessing the system as a Customer SuperUser. When you save the record, you are given the opportunity to designate the libraries for which the user can perform Global User Permission Maintenance (see* ***Managing Regional SuperUsers*** *on page* ***52*** *for details).*

Mode	Description
ILL Staff	User can access the ILL Administration module; by default, user is granted all permissions *except* **Cancel/Change request**, **Change any library** and **Patron Request Tracking** (see the ***ILL Administration User Guide*** for details). *When you save the record, you are given the opportunity to grant or deny additional ILL permissions (see **Modifying ILL Permissions** on page **13** for details).*
PAC Admin	If the **PAC Admin** checkbox is selected, use the **Regular Staff** and **Library SuperUser** radio buttons to select the features and functions available to the user: • **Regular Staff** - User can access all standard administrative functions within the PAC Administration module (see the ***PAC Administration User Guide*** for details). • **Library SuperUser** – User can access all standard administrative functions within the PAC Administration module, can manage Valid Barcode Ranges, can view the Z39.50 Transaction Error Log (see the ***PAC Administration User Guide*** for details), and can configure ILL Pick Lists (see the ***ILL Administration User Guide*** for details).
Staff User	User can view Database Statistics via the Statistics module. (User *must* also be assigned to the **Statistics** User Type.)
Statistics	User can access the **Statistics** module to view Database Statistics (user *must* also be assigned to the **Staff User User Type**) and/or ILL Statistics (user *must* also be assigned to the **ILL Staff User Type**). *Initially, the user is not granted access to any specified statistics report. When you save the record, you are given the opportunity to select the specific statistics reports to which the user will be granted access (see **Modifying Statistics Permissions** on page **21** for details).*
User Administrator	User can access all functions within the User Administration module (see the ***User Administration User Guide*** for details).

- A checkmark ☑ indicates the user *is* assigned to the associated **User Type**.
- An empty checkbox ☐ indicates the user *is not* assigned to the associated **User Type**.
- Clicking a checkbox repeatedly will toggle it on and off.

3. Enter a name for the new user in the **Username or Barcode** text box.

   - The **Username or Barcode** can contain *any* combination of alphabetic and/or numeric characters, and the underscore character "_". *Do not* include spaces in the **Username or Barcode**.

   *Each user must be assigned a unique **Username or Barcode**. If you attempt to add a user with a **Username or Barcode** that already exists in your library's user database, the message "This Username has already been used. Please use another." displays when you save the user record.*

4. Enter a password for the new user in the **Password** and **Confirm Password or PIN** text boxes.

   - The **Password** may have *any combination* of alphabetic (upper- or lower-case) and numeric characters, and any special characters (such as & * $ # @ , etc.). The **Password** *is not* case-sensitive. *Do not* include spaces in the **Password**. **Enter the password in *exactly* the same way in both text boxes.**

     *If you do not enter the password identically in both the **Password** and **Confirm Password or PIN** text boxes, a dialog displays the message "Passwords do not match. Please reenter." when the record is saved. Click the **OK** button on the dialog to close the message, and reenter the password in the **Password** and **Confirm Password or PIN** text boxes.*

   - If desired, you may enter the *default* password "USERPASS" or "STAFFPASS". Upon logging into the system for the *first time*, the user will be required to provide a *permanent password* of their own choosing to complete the login process.

5. If appropriate, enter a reminder question related to the user's password in the **Reminder Question** text box.

   *In the event a user forgets their password, they may request that their reminder question be e-mailed to them to provide a hint as to their password. When a reminder question is entered in the user record, be sure to include an e-mail address for the user in the **E-mail Address** text box (see step 7, below).*

6. Enter the user's first name, middle initial, and last name in the **First Name**, **Initial** and **Last Name** text boxes.

7. Enter the mailing address for the user using the **Address 1**, **Address 2**, **City, Zip** and **Country** text boxes, and the **State** drop-down menu.

8. Enter the e-mail address, telephone number(s) and fax number for the user in the **E-Mail**, **Home Phone**, **FAX**, **Mobile Phone** and **Work Phone** text boxes.

9. Enter the user's date of birth in the **Date of Birth** text box.

10. If appropriate, enter any unique identifying number for the user in the **Custom Number** text box.

    - The **Custom Number** may have *any combination* of alphabetic (upper- or lower-case) and numeric characters, and any special characters (such as & * $ # @ , etc.). The **Custom Number** can be a maximum of 11 characters.

11. If desired, enter any additional information related to the user in the **Notes** text box.

12. If your library has enabled the *optional* "ILL Request Limits" feature (see the ***ILL Administration User Guide*** for more information), select the category to which you wish to assign the user from the **Patron Category** menu.

13. If your library limits access to certain Resources based on Patron Group assignment, select the group to which you wish to assign the user from the **Patron Group** menu.

14. If your library has enabled the *optional* "Expiration Date" feature, enter the expiration date for the user in the **Expiration Date** text box.

    - Enter the **Expiration Date** using the format "MM/DD/YYYY," *including slashes.*

    *When the date entered in the **Expiration Date** text box is reached, the user will be prohibited from logging into the system.*

15. Select the desired status for the user from the **Account Status** drop-down menu, either **Disable** (account is *inactive*; user *cannot* log into the system) or **Enable** (account is *active*; user *can* log into the system).

    *The default selection for **Account Status** is **Enable**.*

16. If the user account will be used simultaneously by *multiple* users, select the **Is an Institution** checkbox.

    *The **Is an Institution** feature allows an authenticated user to be identified as an "institution" (a single entity that is used to validate one or more individuals affiliated with that institution).*

17. When all desired information for the user has been entered, click the **Submit** button to add the new user to your library's database.

    *If you did not include an **Expiration Date** for the user, an advisory dialog displays the message "No Expiration date was entered" when you submit the record. Click the **OK** button. You will need to edit the user record if you wish to add an **Expiration Date** (see **Editing User Accounts** on page **24** for details).*

    - The status message "User *(Username*) added" displays.

    *If you assigned the user to the **ILL Staff**, **CAT Staff** and/or **Statistics** User Type(s), a "permissions" screen displays when you submit the record. Modify ILL Permissions, CAT permissions, Authority/Translate preferences and Statistics Permissions as appropriate (see **Modifying ILL Permissions** on page **13**, **Modifying AGCat Permissions** on page **16**, **Modifying Web HLD***

*[**Permissions**](#) on page **17**, **Modifying Translate/Authority Preferences** on page **20**, or **Modifying Statistics Permissions** on page **21** as appropriate, for details).*

***For Customer SuperUsers only:** If you assigned the user to the **Regional SuperUser** User Type, a "Select Libraries" screen displays when you submit the record. Select the libraries for which the user may perform various functions throughout the system (see **Managing Regional SuperUsers** on page **52** for details).*

*If you assigned the user to the Patron group, it may be necessary to edit the ILL permissions for the user (see **Configuring ILL Permissions for Patrons** on page **27** for details).*

18. Click the **OK** button on the status message to close the message and return to the Add a User Account screen.

19. Repeat steps **2** through **18** to add *additional* users to your library's database.

*When you add a new patron record to your library's database, default preferences are applied to the user's record according to the default values specified for the "generic" patron record (see **Editing Preferences for "Generic" Users** on **27** for details).*

Cloning Staff Permissions

The **Clone Staff Permissions** checkbox on the Add a User Account screen lets you copy the staff modes and specific permissions from an *existing* staff user to a *new* staff user.

To clone staff permissions:

1. From the **User Admin** menu, select **Add a User**.

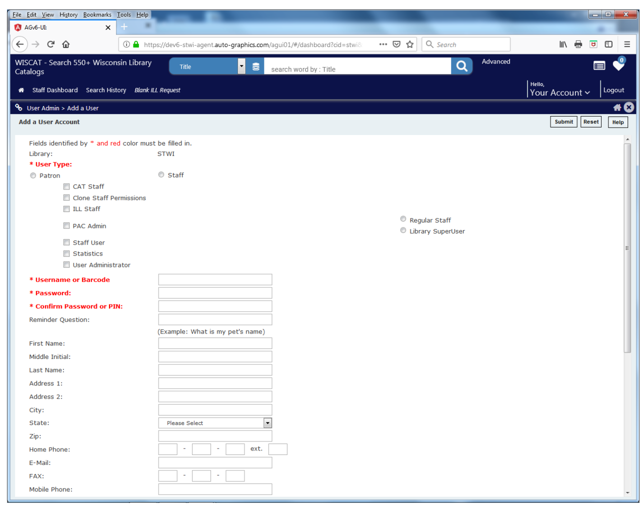
   - The Add a User Account screen displays. The **Library** field shows the library code for the library to which the new user account will be added.

2. Select the **User Type – Staff** radio button.

3. Select the **Clone Staff Permissions** checkbox. Leave *all* other **User Type** checkboxes *unselected.*

4. Complete the remaining form fields as described in steps **3** through **18** for "Adding a User" (see ***Adding a User*** on page **9** for details).

5. When all desired information for the user has been entered, click the **Submit** button to add the user to your library's database.



Add a User Account Screen

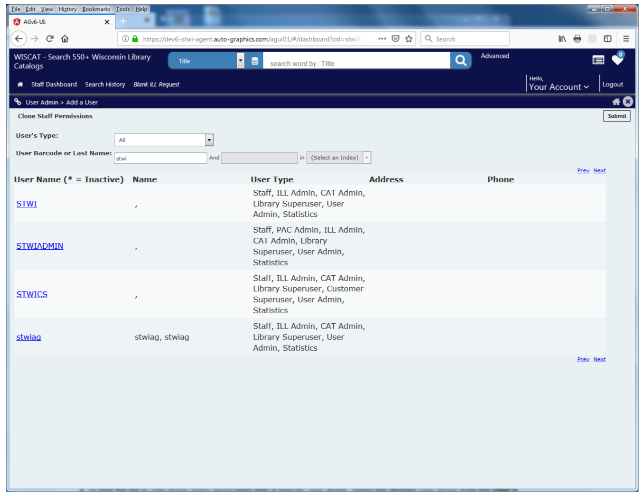
*If you did not include an **Expiration Date** for the user, an advisory dialog displays the message "No Expiration date was entered" when you submit the record. Click the **OK** button. You will need to edit the user record if you wish to add an **Expiration Date** (see **Editing User Accounts** on page **24** for details).*

   - The Select User to Clone screen displays.

6. Enter the desired search criteria:

- To limit the list to *only* those users associated with a specific user group, select the desired user group from the **User's Type** menu, then click the **Submit** button.
  - Select **All** to display users for *all* user groups.
  - Select the desired staff mode (**PAC Admin**, **ILL Admin**, etc.) to display users for the associated mode.
- To locate a specific user by *barcode* or *name*, enter the user's barcode or last name in the **User Barcode or Last Name** text box. To view a list of *all* users associated with the currently specified **User's Type**, leave the **User Barcode or Last Name** text box *blank*.

  When searching by a user's name, you may enter a complete or partial last name.



Select User to Clone Screen

7. Click the **Submit** button to submit your search of the user database.
   - The screen refreshes to display the User Account List. The User Account List shows a listing of *all users* that match your search criteria.
   - Use the **Prev** and **Next** links to view other pages of the list.

   *The **Prev** and **Next** links are active only if the User Account List contains more than 20 users.*
8. Click the **User Name** link for the desired user.
   - The message "Staff permissions from (*user to clone*) have been applied to (*new user*)" displays.
9. Click the **Close** button to close the message.

Modifying User Permissions

When you add a new **Staff** user, depending on the specific group(s) to which a **Staff** user is assigned, an Add User Permissions screen may display when you submit the record. Assign permissions to the user as appropriate:

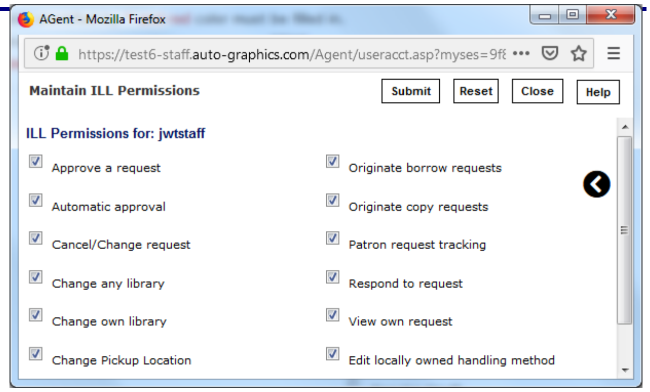
- **ILL Staff** – see ***Modifying ILL Permissions*** on page **14**
- **CAT Staff** – see ***Modifying AGCat Permissions*** on page **16**, ***Modifying Web HLD Permissions*** on page **17**, ***Modifying CAT Admin Permissions*** on page **19**, and ***Modifying Translate/Authority Preferences*** on page **20**
- **Statistics** – see ***Modifying Statistics Permissions*** on page **21**

Modifying ILL Permissions

When you add a *new* user and assign **ILL Staff** permissions (see ***Adding a User*** on page **9** for details), or when you click the **ILL Permissions** link on the Edit User Accounts screen (see ***Editing User Accounts*** on page **21** for details), the ILL Permissions screen displays. The ILL Permissions screen shows the ILL permissions currently granted to the user. You may grant or deny additional permissions as desired.

To modify ILL permissions:

1. Use the checkboxes to select the per-missions you wish to grant to the user.



ILL Permissions Screen

- Clicking the checkbox next to a permission will toggle it on and off.
- A *checkmark* in the checkbox indicates the user is *granted* the associated permission.
- An *empty checkbox* indicates the user is *denied* the associated permission.
- Use the definitions below to determine whether a permission should be granted or denied for a given user.

Permission	Definition
Approve a request	Allows the user to process requests while in Awaiting Approval status for electronic submission to lenders.
Automatic approval	Automatically sends requests to the first lender when the user submits an ILL request using the ILL Request Form or the Blank ILL Request Form.
Cancel/Change request	Allows the user to cancel a request made as a Borrower, or to update fields on a request made as a Borrower.
Change any library	Allows the user to update any participant library record; allows the user to access the Reports and Download feature for any library. *This permission should be reserved for System Administrators only.*
Change own library	Allows the user to update the participant record for their own library; allows the user to access the Reports and Download feature for their own library. *This permission should be reserved for System or Library Administrators only.*
Change Pickup Location	Allows the user to select a Pickup Location for the request other than the Pickup Location specified when the request was submitted. This permission is applicable only to libraries using the optional “Network” pickup location functionality (see the ***ILL Administration User Guide*** for details).
Undo Shipped Item	Allows the user to return the status of an item marked as “shipped” to “Pending.” *This permission is optional and may not be available for all libraries.*
Originate borrow requests	Allows the user to create and submit borrow requests using the ILL Request Form or the Blank ILL Request Form.
Originate copy requests	Allows the user to create and submit photocopy requests using the ILL Request Form or the Blank ILL Request Form.
Patron request tracking	Allows library patrons to view the status of their own ILL requests using the **Items from Other Libraries** option available through **My Account**.
Respond to request	Allows the user to process ILL requests.
View own request	This permission is obsolete.
Edit locally owned handling method	Allows the user to select the desired method for handling ILL requests for “locally owned” titles. This permission is applicable only to libraries using the optional “Network” pickup location functionality (see the ***ILL Administration User Guide*** for details).

2. When all desired changes to ILL permissions have been made, click the **Submit** button to save your changes.

Modifying AGCat Permissions

AGCat Permissions are available only if your library has purchased the optional AGCat module.

When you add a *new* user and assign **CAT Staff** permissions (see ***Adding a User*** on page **9** for details), the AGCat Permissions screen displays automatically when you submit the new user record. When you click the **AGCat Permissions** link on the Edit User Accounts screen (see ***Editing User Accounts*** on page **21** for details), the AGCat Permissions screen displays.

The AGCat Permissions screen shows the AGCat permissions currently granted to the user when performing cataloging maintenance functions using AGCat (see the ***AGCat Client User Guide*** for details). AGCat Permissions determine the specific cataloging functions the user can perform within the Union database. AGCat Permissions determine the type of information the user can upload to the database (bibliographic and/or holdings) and the libraries for which the user can perform database maintenance (their library *only*, selected libraries or all libraries).

You may change AGCat Permissions as desired.

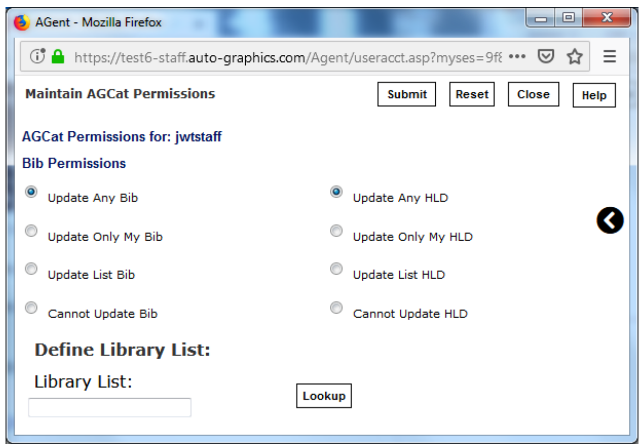
To modify AGCat Permissions:

If any bibliographic update permission is granted, a holding update permission must also be granted.

1. Use the radio buttons to select the permissions you wish to grant to the user.

   - Use the definitions below to determine whether a permission should be granted or denied for a given user.

     Depending on the AGCat Permissions currently granted to your library (by the Customer SuperUser for your consortium or collective), some permissions may not be available for assignment to library staff members.



AGCat Permissions Screen

Bib Permissions:

- ○ **Update Any Bib** - Can upload new/edited bibliographic information or delete bibliographic records for *any* library.
- ○ **Update Only My Bib** - Can upload new/edited bibliographic information or delete bibliographic records for your library *only* (for bibliographic records to which your library is the *only* holder attached).
- ○ **Update List Bib** - Can upload new/edited bibliographic information or delete bibliographic records for multiple *selected* libraries *only* (for bibliographic records to which one or more of the libraries shown in the **Library Codes** list are the *only* holders attached).
- ○ **Cannot Update Bib** - Cannot upload new/edited bibliographic information or delete bibliographic records for *any* library.

HLD Permissions:

- ○ **Update Any HLD** - Can upload added/edited/deleted holdings (locations) information for *any* library.
- ○ **Update Only My HLD** - Can upload added/edited/deleted holdings (locations) information for your library *only* (for bibliographic records to which your library is the *only* holder attached).
- ○ **Update List HLD** - Can upload added/edited/deleted holdings (locations) information for multiple *selected* libraries *only* (for bibliographic records to which one or more of the libraries shown in the **Library Codes** list are the *only* holders attached).

- ○ **Cannot Update HLD** - Cannot upload added/edited/deleted holdings (locations) information for *any* library.

2. If the **Update List Bib** or **Update List HLD** option is selected for *either* the **Bib Permissions** or **HLD Permissions**, enter the library codes for which the user may perform database updates in the **Library List** text box.

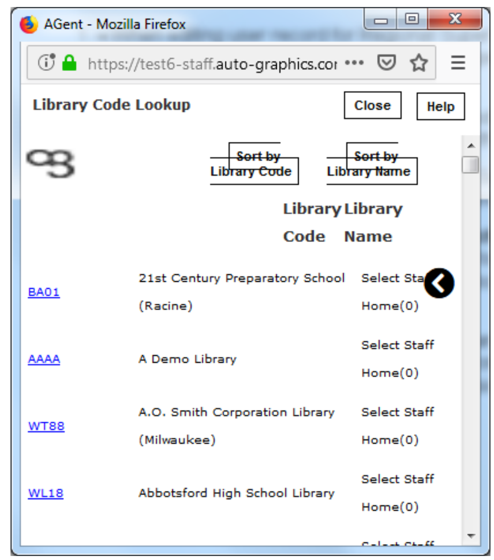
   *If your library has been granted **Update Any Bib** or **Update Any HLD** permissions, the **Library List** option is available. If your library has been granted **Update List Bib** and **Update List HLD** permissions only, the **Library List** field is read-only, and contains the library codes for which you library is authorized to perform cataloging maintenance functions (as established by the Customer SuperUser for your consortium or collective).*

   *The system uses the same **Library List** for both the bibliographic update permission and the holding update permission (when the **by Library codes** option is selected). You cannot specify a different **Library List** for bibliographic and holding update permissions.*

   - Enter the library codes for the libraries for which the user may perform database updates in the **Library List** text box. Separate multiple library codes with commas. *DO NOT* use spaces in the **Library List**.

   - If desired, click the **Lookup** button to use the Lookup feature to locate the desired Library Codes:

     - ○ The Library Code Lookup screen displays in an *additional* browser window. This list shows the **Library Code** and **Library Name** for *all* libraries in your consortium or collective.
     - ○ Click the **Sort by Library Code** button to sort the list alphabetically by **Library Code**.
     - ○ Click the **Sort by Library Name** button to sort the list alphabetically by library name.
     - ○ Click the **Library Code** for a library you wish to add to the **Library List**. The selected code is *automatically* added to the list. Select additional codes as desired.
     - ○ When all desired libraries have been selected, click the **Close** button to close the Library Code Lookup window and return to the AGCat Permissions screen.



Library Code Lookup Screen

3. When all desired changes to AGCat Permissions have been made, click the **Submit** button to save your changes.

Modifying Web HLD Permissions

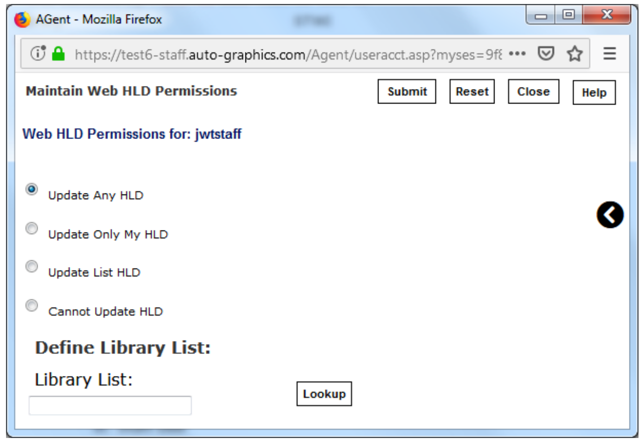
Web HLD Permissions are available only if your library has purchased the optional CAT Administration module.

When you add a *new* user and assign **CAT Staff** permissions (see ***Adding a User*** on page **9** for details), the Web HLD Permissions screens display automatically when you submit the new user record. When you click the **Web HLD Permissions** link on the Edit User Accounts screen (see ***Editing User Accounts*** on page **21** for details), the Web HLD Permissions screen displays.

The Web HLD Permissions screen shows the permissions currently granted to the user when performing locations (holdings) maintenance functions using CAT Administration (see the ***CAT Administration User Guide*** for details). Web HLD Permissions determine the libraries for which the user can perform locations maintenance (their library *only*, selected libraries or all libraries).

You may change Web HLD Permissions as desired.

To modify HLD Permissions:



Web HLD Permissions Screen

1. Use the radio buttons to select the permissions you wish to grant to the user.

   - Use the definitions below to determine whether a permission should be granted or denied for a given user.

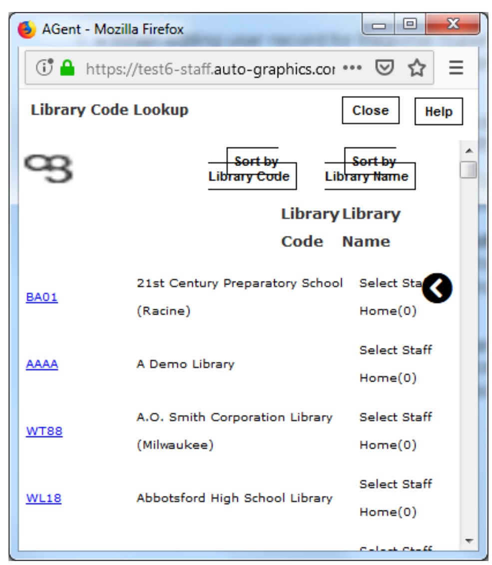
     Depending on the HLD Permissions currently granted to your library (by the Customer SuperUser for your consortium or collective), some permissions may not be available for assignment to library staff members.

     HLD Permissions:

     - **Update Any HLD** - Can upload added/edited/deleted holdings (locations) information for *any* library.
     - **Update Only My HLD** - Can upload added/edited/deleted holdings (locations) information for your library *only* (for bibliographic records to which your library is the *only* holder attached).
     - **Update List HLD** - Can upload added/edited/deleted holdings (locations) information for multiple *selected* libraries *only* (for biblio-graphic records to which one or more of the libraries shown in the **Library Codes** list are the *only* holders attached).
     - **Cannot Update HLD** - Cannot upload added/edited/deleted holdings (locations) information for *any* library.

2. If the **Update List Bib** or **Update List HLD** option is selected for *either* the **Bib Permissions** or **HLD Permissions**, enter the library codes for which the user may perform database updates in the **Library List** text box.

   *If your library has been granted **Update Any HLD** permissions, the **Library List** option is available. If your library has been granted **Update List HLD** permissions, the **Library List** field is read-only, and contains the library codes for which your library is authorized to perform locations maintenance (as established by the Customer SuperUser for your consortium or collective).*



Library Code Lookup Screen

   - Enter the library codes for the libraries for which the user may perform database updates in the **Library List** text box. Separate multiple library codes with commas. *DO NOT* use spaces in the **Library List**.
   - If desired, click the **Lookup** button to use the Lookup feature to locate the desired Library Codes:
     - The Library Code Lookup screen displays in an *additional* browser window. This list shows the **Library Code** and **Library Name** for *all* libraries in your consortium or collective.
     - Click the **Sort by Library Code** button to sort the list alphabetically by library code.
     - Click the **Sort by Library Name** button to sort the list alphabetically by library name.
     - Click the **Library Code** for a library you wish to add to the **Library List**. The selected code is *automatically* added to the list. Select additional codes as desired.

- When all desired libraries have been selected, click the **Close** button to close the Library Code Lookup window and return to the CAT Permissions screen.

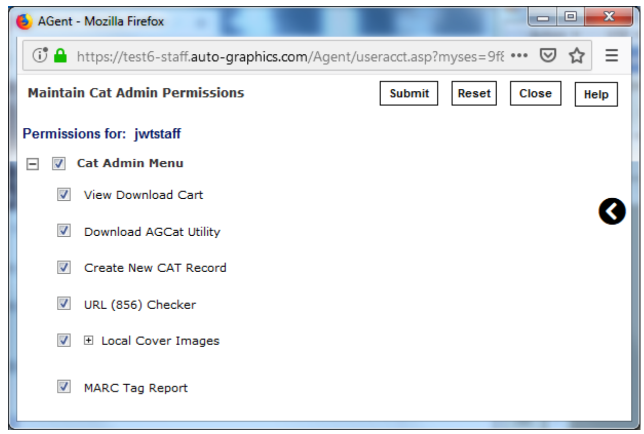
3. When all desired changes to CAT Permissions have been made, click the **Submit** button to save your changes.

Modifying CAT Admin Permissions

When you add a *new* user and assign **CAT Staff** permissions (see ***Adding a User*** on page **9** for details), the CAT Admin Permissions screen displays automatically when you submit the new user record. When you click the **CAT Admin Permissions** link on the Edit User Accounts screen (see ***Editing User Accounts*** on page **21** for details), the CAT Admin Permissions screen displays. The CAT Admin Permissions screen shows the CAT Administration permissions currently granted to the user. You may grant or deny additional permissions as desired.

To modify CAT Admin Permissions:

- The CAT Admin Permissions screen shows a listing of *all* submenus, features and functions available through the **CAT Admin** menu. Click the icon next to a submenu name to view a hierarchical listing of all features and functions available within the associated submenu. (Click the icon next to the submenu name to close the listing.)
    - Permissions granted to the current user are indicated by a checkmark next to the permission name.



CAT Admin Permissions Screen

- Use the checkboxes associated with each feature and function to *grant* or *deny* access to the function.
    - A checkmark indicates the user is granted the associated permission.
    - An empty checkbox indicates the user is denied the associated permission.
    - Clicking a checkbox repeatedly will toggle it on and off.

    To grant a user access to a feature or function within a given submenu, you must select the checkbox for the associated submenu.

- Use the definitions below to determine whether a permission should be granted or denied for a given user.

Permission	Definition
View Download Cart	Allows the user to view, manage and download the contents of the Download Cart for their user account.
Download AGCat Utility	Allows the user to download the *optional* AGCat Client to a local workstation.
Create New CAT Record	Allows the user to access the Create New Cataloging record screen, from which the AGCat client can be launched to allow for creation of a *new* bibliographic record.
URL (856) Checker	Allows the user to validate URLs in MARC tag 856 $u for *all records* in your library's A-G database(s).
Local Cover Images	Allows the user to view the **Local Cover Images** submenu. User may be selectively granted permissions for the following functions:
Add Local Cover	Allows the user to add a local cover image for a specified bibliographic record.
Delete Local Cover	Allows the user to delete a previously uploaded local cover image from a specified bibliographic record.

Permission	Definition
MARC Tag Report	Allows the user to generate MARC Tag Reports.
Authority Database Connection	Allows the user to specify the parameters for connection to the desired authority database.
Authority Heading Report	Allows the user to generate a report showing authority heading usage in your library's Main A-G database.

- When all desired submenus, feature and functions have been selected, click the **Submit** button to submit your changes to CAT Admin Permissions.

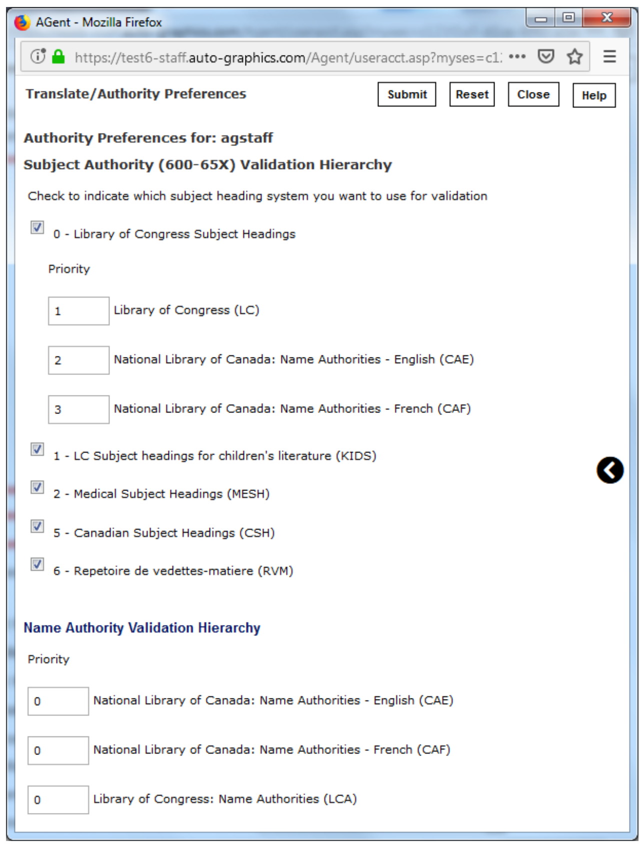
Modifying Translate/Authority Preferences

Translate/Authority Preferences are available only if your library has purchased the optional Translate/Authority module.

When you add a *new* user and assign **CAT Staff** permissions (see ***Adding a User*** on page **9** for details), the Translate/Authority Preferences screen displays automatically when you submit the new user record. When you click the **Edit Translate/Authority Preferences** link on the Edit User Accounts screen (see ***Editing User Accounts*** on page **21** for details), the Translate/Authority Preferences screen displays.

Authority Preferences are used to configure the authority validation hierarchy for the user. The authority validation hierarchy determines the order in which authority records are searched during authority control processing (see the ***Authority User Guide*** for details). The validation hierarchy may include records from sources such as the Library of Congress, National Library of Canada, Medical Subject Headings, etc.

During authority control processing, the system searches authority records from the top of the validation hierarchy down, until a match is found. When a match for a bibliographic heading is found in an authority record at the top of the validation hierarchy, the bibliographic heading is flagged as "**VALIDATED**" and the remaining authority records are not searched.



Translate/Authority Preferences Screen

Translate Preferences are used to enable or disable Translation functionality for the user.

Translation functionality is not currently implemented.

1. Use the **Subject Authority (600-65X) Validation Hierarchy** checkboxes to select the authority files you wish to use for "subject" validation.
   - A *checkmark* indicates the associated authority file *will be* used for subject validation.
   - An *empty checkbox* indicates the associated authority file *will not be* used for subject validation.
   - Clicking a checkbox repeatedly will toggle it on and off.

2. If the **Library of Congress Subject Headings** option has been selected, use the **Priority** text boxes to specify the priority (order of preference) for the authority files listed, beginning with "**1**."
   - You must enter a *unique* preference number in *each* **Priority** text box.
3. Use the **Name Authority Validation Hierarchy – Priority** text boxes to specify the priority (order of preference) for the authority files listed, beginning with "**1**."
   - You must enter a *unique* preference number in *each* **Priority** text box.
4. When all desired changes to authority/translate preferences have been made, click the **Submit** button to save your changes.

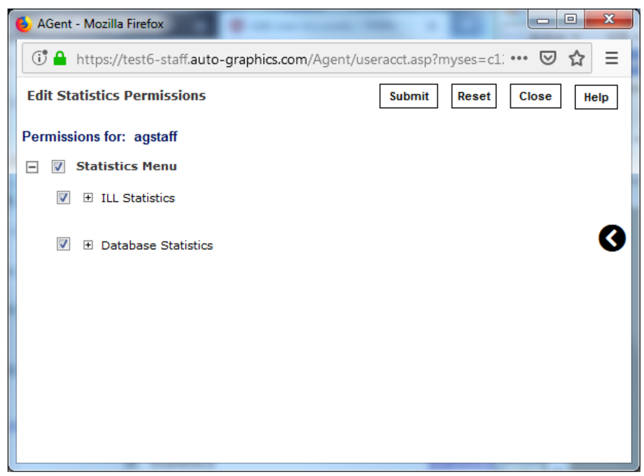
Modifying Statistics Permissions

THIS FEATURE IS CURRENTLY UNDERGOING REDESIGN AND MAY NOT FUNCTION AS DESCRIBED. UPDATES WILL BE RELEASED AS AVAILABLE.

When you add a *new* user and assign **Statistics** permissions (see ***Adding a User*** on **9** for details), or when you click the **Statistics Permissions** link on the Edit User Accounts screen (see ***Editing User Accounts*** on **24** for details), the Statistics Permissions screen displays. The Statistics Permissions screen shows the Statistics permissions currently granted to the user. You may grant or deny additional permissions as desired.

To modify Statistics permissions:

- Click the ⊞ icon next to the **Statistics Menu** heading to view a hierarchical listing of all submenus, features and functions available within the module. (Click the ⊟ next to the **Statistics Menu** heading to close the listing.)
  - Click the ⊞ next to a submenu name to view a hierarchical listing of all features and functions available within the submenu. (Click the ⊟ icon next to the submenu name to close the listing.)
- Permissions granted to the current user are indicated by a checkmark ☑ next to the permission name.



Statistics Permissions Screen

- Use the checkboxes associated with each submenu, feature and function to grant or deny access to the function. A *checkmark* ☑ indicates the user is granted the associated permission; an *empty checkbox* ☐ indicates the user is denied the associated permission.

  To grant a user access to a feature or function within a given submenu, you must select the checkbox for the associated submenu. When you select the checkbox for a submenu, the checkboxes for all features and functions within the submenu are selected automatically.

- Use the following definitions to determine whether a permission should be granted or denied for a given user.

Permission	Definition
Ill Statistics	Allows the user to view the **ILL Statistics** submenu. User may be selectively granted permissions for the following functions:
Activity and Request Reports	Allows the user to generate ILL activity reports (borrowing activity, lending activity, net activity), and download request records and/or lender response records.

Permission	Definition
Summary Report	Allows the user to generate a report showing summary statistics for the number of completed ILL requests processed by *all libraries* in a consortium or collective, as a *borrower from* other participant libraries and as a *lender to* other participant libraries. *The **Summary Report** is available to Customer SuperUsers only.*
CONTU Copyright Tracking Reports	Allows the user to generate reports related to Copyright Tracking.
Download Participant Records	Allows the user to export selected data fields from the Participant Records of one or more selected libraries within a consortium or collective.
Borrower Statistics	Allows the user to generate statistical reports that provide snapshots of ILL requests submitted *as a borrower*, under various fulfillment headings.
Borrower Record Counts	Allows the user to generate a report that shows the total number of active and completed ILL requests submitted *as a borrower*, grouped according to current status category.
Borrower Days to Receive Report	Allows the user to generate a report that summarizes the amount of time, including time in transit, it took to receive requested materials from lenders for a given time period.
Lender Statistics	Allows the user to generate statistical reports that provide snapshots of ILL requests received *as a lender*, under various fulfillment headings.
Lender Record Counts	Allows the user to generate a report that shows the total number of in-process ILL requests received *as a lender*, grouped according to current status category.
Lender Days to Supply Report	Allows the user to generate a report that summarizes the amount of time it took to provide and ship requested materials to borrowers for a given time period.
Stayed Too Long Report	Allows the user to generate a report that lists all active ILL requests that have remained "idle" at a selected status for greater than a specified number of days.
Staff Login Activity Report	Allows the user to generate a report that shows the most recent login date for qualifying staff users (based on a specified cutoff date) at one or more selected libraries within a consortium or collective. *The **Staff Login Activity Report** is available to Customer SuperUsers only.*
Patron Lookup Report	Allows the user to generate a report related to lookups performed using the optional Patron Lookup Tool. *The **Patron Lookup Report** is available to Customer SuperUsers only.*
Batch Status Update	Allows the user to perform a batch update of up to 200 selected ILL requests in a single status across multiple libraries. *The **Batch Status Update** function is available to Customer SuperUsers only.*
Searches with Zero Results	Allows the user to view a list of searches for a specified time period that returned zero results.
Database Statistics	Allows the user to view the **Database Statistics** submenu. User may be selectively granted permissions for the following functions:
Database Index Stats	Allows the user to view and download general statistics (index statistics, qualifier statistics and holdings statistics) for the Union catalog.
Database Field Stats	Allows the user to view general information related to the number of bibliographic and locations (holdings) record in your library's A-G database, and detailed MARC Field statistics for the entire database for your library.
System Activities	Allows the user to view summary information related to your library's system for a specified report period; displayed statistics include login data, search data, ILL request data and cataloging data.
Statistics Report	Allows the user to generate detailed statistics reports based on user-specified parameters.
Graphical Statistics Report	Allows the user to view summary information related to your library's system for a specified report period in a graphical format; available statistics include login data, search data, ILL request data and cataloging data.

- When all desired submenus, feature and functions have been selected, click the **Submit** button to submit your changes to Statistics permissions.

Setting the Default User Password

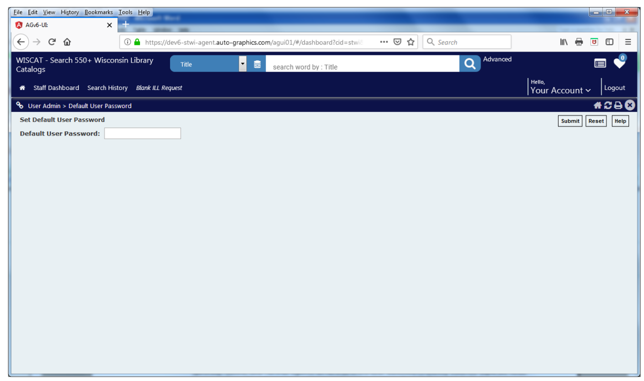
You can pre-configure the User Record with a *default* user password to be applied to all *new* user records (patron and staff) that are created in the User Administration module. Additionally, the system supports the use of two *specialized* default password, “USERPASS” and “STAFFPASS.” When a user assigned the password “USERPASS” or “STAFFPASS” logs into the system for the *first time*, the Permanent Password screen displays. The user *must* provide a permanent password to complete the login process.

It is recommended that only the password “USERPASS” or “STAFFPASS” by used as the default user password. Use of any other password will not trigger display of the Permanent Password screen.

To set the default user password:

1. From the **User Admin** menu, select **Default User Password**.
    - The Set Default User Password screen displays.
2. Enter the desired default user password in the **Default User Password** text box.
3. Click the **Submit** button to save your changes.

The specified **Default User Password** will be applied to all *new* user records (patron and staff) that are created in the User Administration module.

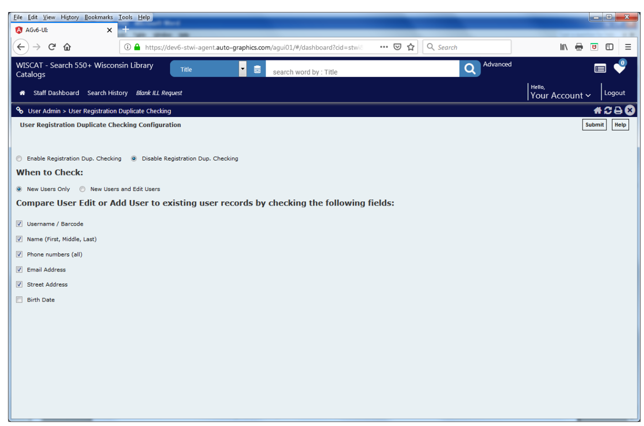


Set Default Password Screen

*The default user password will display in the **Password** and **Confirm Password or PIN** fields of the Add a User Account screen (see **Adding a User** on page **9** for details) as a series of asterisks.*

Configuring User Registration Duplicate Checking

The **User Registration Duplicate Checking** function aids in minimizing the occurrence of creating more than one user record for a given patron. When a user record is saved, the system compares new (and, optionally, edited) user records against all records in the user database to identify selected duplicate fields (username/barcode, patron name, address, and/or contact information). In the event duplicate values are detected between the added/edited record and any other existing record in the user database, notification is provided to permit staff to determine the proper disposition for the new/edited record.



User Registration Duplicate Checking Configuration Screen

To configure User Registration Duplicate Checking:

1. From the **User Admin** menu, select **User Registration Duplicate Checking**.
    - The User Registration Duplicate Checking Configuration screen displays.

2. Select the **Enable Registration Dup. Checking** radio button to *enable* registration duplication detection functionality.
   - Select the **Disable Registration Dup. Checking** radio button to *disable* registration duplication detection functionality.
3. Use the **When to Check** radio buttons to specify *when* registration duplication detection should be performed.
   - Select the **New Users Only** radio button to perform registration duplication detection *only* when adding *new* users.
   - Select the **New Users and Edit Users** radio button to perform registration duplication detection when adding *new* users or editing *existing* users.
4. Use the **Compare User Edit or Add User to existing user records by checking the following fields** checkboxes to select the *specific* field(s) to be checked for duplicate entries. You can check for duplicates by **Username / Barcode**, **Name (First, Middle, Last)**, **Phone numbers (all)**, **Email Address**, **Street Address** and/or **Birth Date**.
   - A *checkmark* ☑ indicates the associated field in the User Record *will be* checked for duplicates.
   - An *empty checkbox* ☐ indicates the associated field in the User Record *will not be* checked for duplicates.
   - Clicking a checkbox repeatedly will toggle it on and off.

   *When duplicate checking by **Birth Date** is enabled, records with duplicate birthdates are identified only when at least one additional selected duplicate field is identified in the records. When the **Birth Date** checkbox is selected, you must select at least one other field for inclusion in duplicate checking.*
5. When all desired parameters have been selected, click the **Submit** button to save your changes.
   - The message "The settings above have been saved" displays at the bottom of the screen.

   *If the **Enable Registration Dup. Checking** radio button is selected, and you have not selected at least one **Compare User Edit or Add User to existing user records by checking the following fields** checkbox, the message "Please select at least one check box above" displays at the bottom of the screen. Repeat step **4** to selected the desired fields for comparison, then click the **Submit** button to save your changes.*

   *If the **Birth Date** checkbox is selected and no other **Compare User Edit or Add User to existing user records by checking the following fields** checkbox has been selected, the message "Please select at least one check box in addition to Birth Date" displays at the bottom of the screen. Repeat step **4** to selected the desired fields for comparison, then click the **Submit** button to save your changes.*

Editing User Accounts

You can edit the user record for *any* current authenticated user for your library *only*.

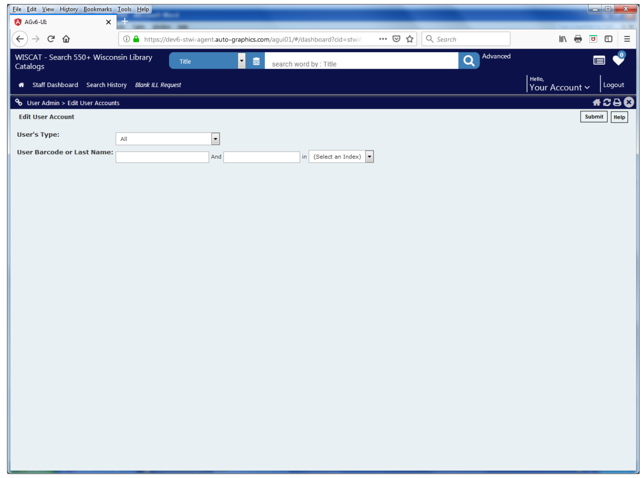
*You cannot change the **Username or Barcode** for a current authenticated user.*

Viewing the User Account List

The User Account List shows *all* current authenticated users for your library, in alphabetic order by **Name** (last name first), and includes the **User Name**, **Name** and **User Type** (user group assignments) for each user. *Disabled users* are indicated by an asterisk "*" following the **User Name**. From the User Account list, you may choose to edit the record for a current authenticated user (see ***Editing User Records*** on **25** for details) or delete an authenticated user from your library's database (see ***Deleting Users*** on page **29** for details).

To view the User Account list:

1. From the **User Admin** menu, select **Edit User Accounts**.
   - The Edit User Account Search Screen displays.

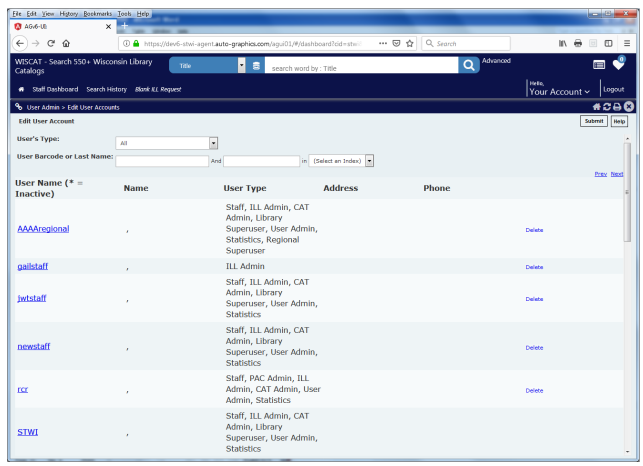


Edit User Account Search Screen

2. Enter the desired search criteria:
   - To limit the list to *only* those users associated with a specific user group, select the desired user group from the **User's Type** menu, then click the **Search** button.
     - Select **All** to display users for *all* user groups.
     - Select **Patron** or the desired staff mode (**PAC Admin**, **ILL Admin**, etc.) to display users for the associated mode.
   - To locate a specific user by *barcode* or *name*, enter the user's barcode or last name in the **User Barcode or Last Name** text box. To view a list of *all* users associated with the currently specified **User's Type**, leave the **User Barcode or Last Name** text box *blank*.

   When searching by a user's name, you may enter a complete or partial last name.

   - To search *other fields* of the user records, enter the desired search term in the **And** text box, and select the desired search index (**City**, **Email Address**, etc.) from the **in** menu.



User Account List

3. Click the **Submit** button to submit your search of the user database.
   - The screen refreshes to display the User Account List. The User Account List shows a listing of *all users* that match your search criteria.
   - Use the **Prev** and **Next** links to view other pages of the list.

*The **Prev** and **Next** links are active only if your library's user database contains more than 20 users.*

Editing User Records

You can edit the user records for authenticated users for your library *only*.

To edit a user record:

1. Access the User Account list, and locate the user for whom you wish to edit the user record (see ***Viewing the User Account List*** on **24** for details).

If a user account for the desired user does not exist, *select* ***Add a User*** *from the* ***User Admin Staff Menu*** *to add a new user record. The Add a User Account screen displays in an* additional *browser window (see* **Adding a User** *on* *9* *for details).*

2. Click the **User Name** link for the desired user.

    - The Edit User Account screen displays in an *additional* browser window.

    - The Edit User Account screen is pre-filled with the current data for the associated user.

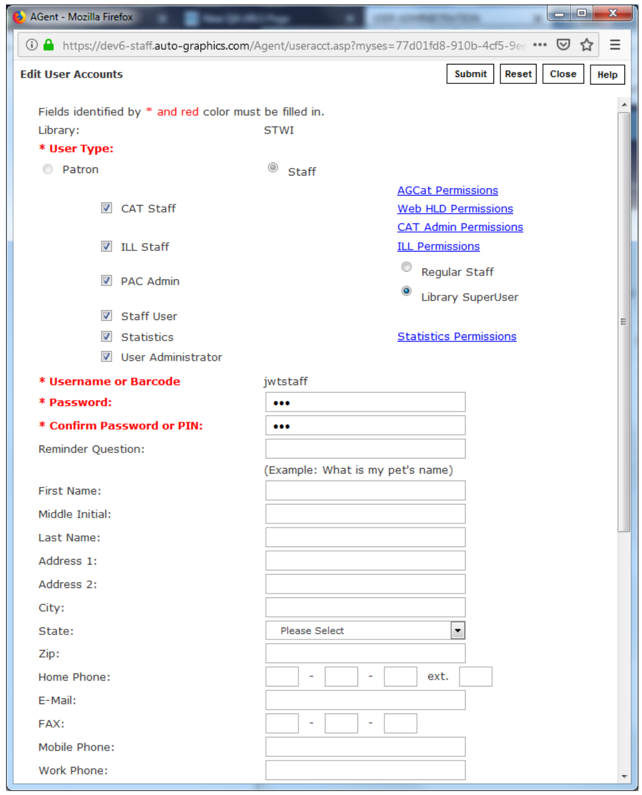
3. Add, change or delete information as desired (see ***Adding a User*** on **9** for details).

    Depending on the specific configuration of the system for your library or consortium, some User Record fields may not be available.

    - To add or delete a patron photograph, click the Manage User Photo link (see *Error! Reference source not found.* on page Error! Bookmark not defined. for details).

    Patron photograph support is a purchasable enhancement, and may not be enabled for all systems.

    - Click the AGCAT Permissions link to modify cataloging permissions for the user when using AGCAT (see ***Modifying AGCat Permissions*** on **16** for details).



Edit User Account Screen

- Click the **Edit Translate/Authority Preferences** link to configure the authority validation hierarchy and enable or disable Translation functionality for the user when using the *optional* Translate/Authority module (see ***Modifying Translate/Authority Preferences*** on **20** for details).

- Click the **Web HLD Permissions** to modify locations (holdings) permissions for the user when using CAT Administration (see ***Modifying Web HLD Permissions*** on **17** for details).

- Click the ILL Permissions link to modify ILL permissions for the user (see ***Modifying ILL Permissions*** on **13** for details).

- Click the Statistics Permissions link to modify Statistics permissions for the user (see ***Modifying Statistics Permissions*** on **21** for details).

- For Customer SuperUsers *only*: Click the Select Libraries link to modify the libraries for which the user can perform Global User Permission Maintenance (see ***Managing Regional SuperUsers*** on page **52** for details).

4. When all desired changes have been made, click the **Submit** button to submit your changes to the user record.

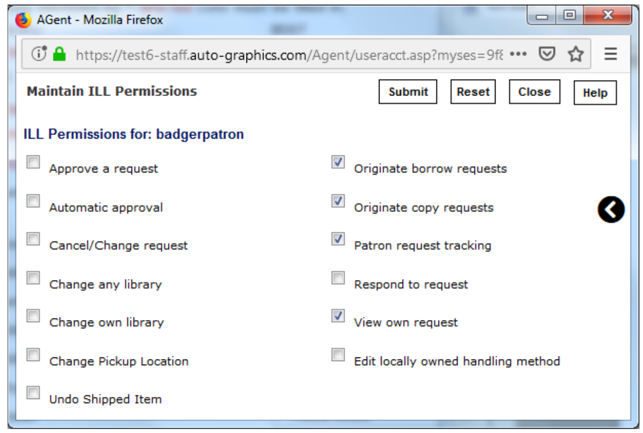
    - The Edit User Account screen closes *automatically*.

5. Repeat steps **2** through **4** to edit *additional* users.

Configuring ILL Permissions for Patrons

If your library participates in Interlibrary Loan, you may wish to allow library patrons to submit ILL requests, and to track the progress of their in-process requests. The “generic” patron account (see ***About Users*** on **9** for details) lets you enable or disable Interlibrary Loan permissions for *unauthenticated* patrons. Additionally, when you add an *authenticated* patron to your library’s user database, the patron *automatically* “inherits” the Interlibrary Loan permissions assigned to the “generic” patron. If you wish to change the Interlibrary Loan permissions for a given *authenticated* patron, you must edit the permissions manually.

To configure ILL permissions for patrons:



ILL Permissions Screen

1. From the User Account List (see ***Viewing the User Account List*** on **24** for details), click the **Username** link for the user for whom you wish to edit ILL Permissions. To edit ILL permissions for *unauthenticated* users, select the **Username** “patron.” To edit ILL permissions for library guests, select the **Username** “guest.”
   - The Edit User Account screen displays in an *additional* browser window.
2. Click the **ILL Permissions** link.
   - The ILL Permissions screen displays in an *additional* browser window.
3. Use the checkboxes to select the permissions you wish to grant to the user.
   - Clicking the checkbox next to a permission will toggle it on and off. A *checkmark* indicates the user is *granted* the associated permission. An *empty checkbox* indicates the user is *denied* the associated permission.
   - To allow the user to submit *borrow* requests, select the **Originate borrow requests** checkbox.
   - To allow the user to submit *copy* requests, select the **Originate copy requests** checkbox.
   - To allow the user to track their in-process ILL requests, select the **Patron request tracking** checkbox.
4. Click the **Submit** button on the ILL Permissions screen to save your changes.
   - The ILL Permissions screen closes *automatically*.
5. Click the **Close** button on the Edit User Account screen.

Editing Preferences for “Generic” Users

The system is configured with “generic patron” and “generic guest” user records. These records let you configure a number of system defaults for *unauthenticated* users that access your library’s system as either a “generic patron” or as a “guest.” You may edit the “generic patron” and “generic guest” user records to:

- Set general user preferences
- Set favorite search sources
- Show or hide search resources

Editing User Preferences

THIS FUNCTIONALITY IS UNDERGOING REDESIGN AND IS NOT CURRENTLY IMPLEMENTED.

Editing Favorite Search Sources

THIS FUNCTIONALITY IS UNDERGOING REDESIGN AND IS NOT CURRENTLY IMPLEMENTED.

Showing and Hiding Search Sources

THIS FUNCTIONALITY IS UNDERGOING REDESIGN AND IS NOT CURRENTLY IMPLEMENTED.

Global User Permission Maintenance

This **Global User Permissions** function lets you globally modify (add or remove) permissions granted to multiple selected staff members.

The libraries for which you can perform Global User Permissions maintenance depends on the PAC Staff permissions granted to your account (Customer SuperUser, Regional SuperUser, or Staff User). Customer SuperUsers can perform Global User Permissions maintenance for all libraries within a consortium or collective. Regional SuperUsers can perform Global User Permissions maintenance for the libraries associated with their accounts (see ***Managing Regional SuperUsers*** *on page* ***52*** *for details). PAC Staff Users can perform Global User Permissions maintenance only for the library with which their user account is associated.*

To perform Global User Permission maintenance:

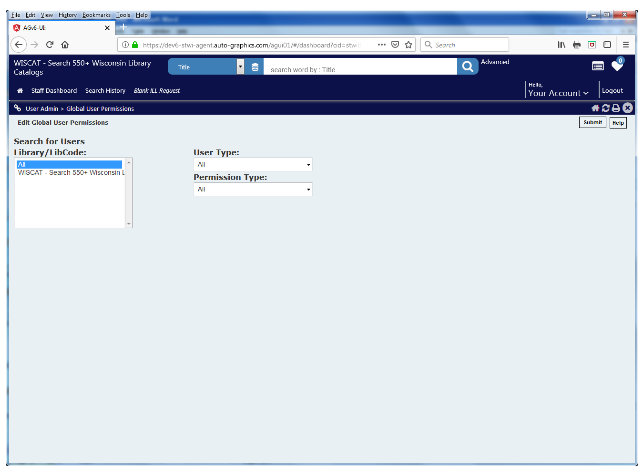
1. From the **User Admin** menu, select **Global User Permissions**.

   - The Edit Global User Permissions search screen displays.

2. Locate the users for whom you wish to perform Global User Permissions maintenance:

   - Select the libraries for which you wish to perform Global User Permission maintenance from the **Search for Users Library/LibCode** menu.

     The ***Search for Users Library/LibCode*** *menu is available to Customer Superusers and Regional Superusers only.*

     Edit Global User Permissions Search Screen

     ○ To select a *single* library, click the name of the desired library.

     ○ To select *multiple* libraries, press and hold the **<Ctrl>** key and click the name of each desired library. When all desired libraries have been selected, release the **<Ctrl>** key.

     ○ To select *all* libraries, select **All** from the **Search for Users Library/LibCode** menu.

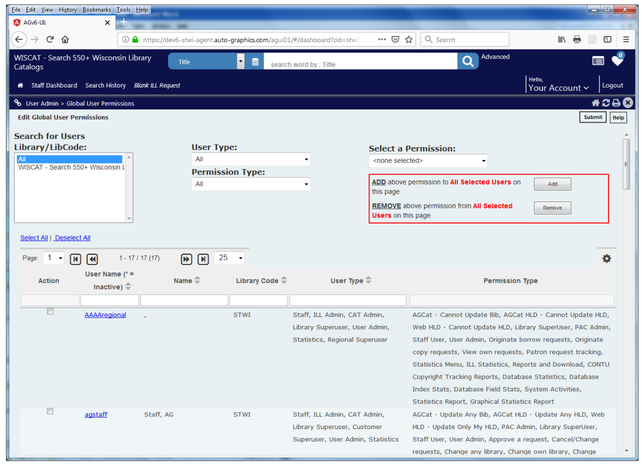
   - To perform Global User Permission maintenance for a specific user type, select the desired user type from the **User Type** menu.

     ○ If you do not wish to limit your search results by user type, select **All** from the **User Type** menu.

- To perform Global User Permission maintenance for users granted a specific user permission, select the desired permission from the **Permission Type** menu.
    - If you do not wish to limit your search results by permission type, select **All** from the **Permission Type** menu.

3. When all desired search criteria has been entered, click the **Submit** button to submit your search.

- The screen refreshes to display a list of users that match your search criteria.
- Each line in the list shows the **User Name** and **Name** of the user, the **Library Code** with which the user is associated, the **User Type**(s) with which the user is associated, and the specific **Permission Type**(s) granted to the user.
- If desired, you can reconfigure, sort and filter table content (see the ***System Basics User Guide*** for more information).



Edit Global User Permissions Results Screen

4. Use the checkboxes to select the users for whom you wish to modify permissions.

- A *checkmark* indicates permissions *will be* modified for the associated user.
- An *empty checkbox* indicates permissions *will not be* modified for the associated user.
- Clicking a checkbox repeatedly will toggle it on and off.
- To *select* the checkboxes for *all users*, click the **Select All** link.
- To *deselect* the checkboxes for *all users*, click the **Deselect All** link.

5. To *add* a permission:

- Select the desired permission from the **Select a Permission** menu.
- Click the **Add** button.
    - The screen refreshes with the **Permission Type** field for each selected user updated to include the added permission.

6. To *remove* a permission:

- Select the desired permission from the **Select a Permission** menu.
- Click the **Remove** button.
    - The screen refreshes with the permission removed from the **Permission Type** field for each selected user.

7. Repeat steps **4** through **6**, as appropriate, to add or remove additional permissions for the current user list. Repeat steps **2** through **6**, as appropriate, to add or remove permissions for a new group of users.

Deleting Users

You can delete authenticated users for your library *only*. You *cannot* delete the “generic patron” or “generic guest” users.

*Resource Sharing systems are configured with the default user accounts (**XXXX**) and (**XXXXADMIN**), where XXXX is the library's Library Code. These accounts can be deleted only by Customer SuperUsers.*

To delete a user:

1. Access the User Account list, and locate the user for whom you wish to delete the user record (see ***Viewing the User Account List*** on **24** for details).
2. Click the **Delete** link for the desired user.
   - The message "Continue to Delete (*Username*)?" displays.
3. Click the **OK** button to delete the user. (Click the **Cancel** button to cancel the deletion and return to the Select User Account list.)
4. Repeat steps **2** through **3** to delete *additional* users.

Generating User Reports

The **User Reports** function lets you generate a *customized* listing of *authenticated* users for your library, based on the criteria you specify. Reports may be displayed on-screen, or downloaded (as a tab-delimited file) to a local workstation.

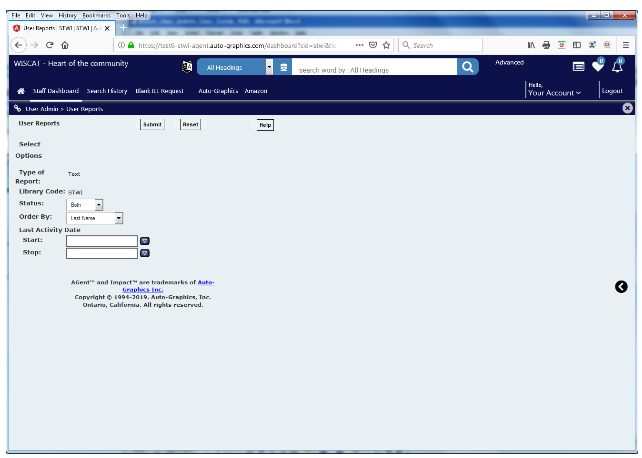
*Customer SuperUsers may generate user reports for any single library in the consortium or collective, or a combined report for all libraries in the consortium or collective (see **Chapter 4, CUSTOMER SUPERUSER** for details).*

To generate a user report:

1. From the **User Admin** menu, (see ***The User Admin Menu*** on page **5** for details), select **User Reports**.
   - The User Reports screen displays.
   - The **Library Code** field shows the library code for the library under which you logged in.
2. Select the desired current account status for users you wish included in the report from the **Status** menu; either **Enabled**, **Disabled** or **Both**.

   Account status is set in the User Record for each authenticated user (patron or staff member).

   - The *default* selection for **Status** is **Both**.
3. Select the desired sort order for the report from the **Order By** menu; either alphabetically by **Last Name**, alphabetically by **Username**, chronologically by **Last Activity Date** or alphabetically by **Library Code**.



User Reports Screen

   - The *default* value for **Order By** is **Last Name**.
4. If desired, use the **Last Activity Date** text boxes to limit the report to users who last logged into the system on a specified day (or range of days).
   - Click the button to enter a **Start** date using the Date Entry Calendar (see the ***System Basics User Guide*** for details).

- Click the button to enter a **Stop** date using the Date Entry Calendar (see the ***System Basics User Guide*** for details).

- To limit the last activity date range to a *single* day, enter the *same date* in *both* the **Start** and **Stop** text boxes.

5. When all desired report parameters have been specified, click the **Submit** button to submit your report request.

   - The system generates an Extract Report file in **.csv** (comma separated value) format suitable for use with a "spreadsheet" application such as Microsoft Excel. An "Export to File" screen displays in an *additional* browser window or tab while the file is being created. A confirmation message display when file creation is completed.

6. To download the Extract Report to a your local workstation:

   - Click the **Save** button on the “file download” screen to save the file to your workstation.
     - A File Download dialog displays.
   - Select the “save” option on the File Download dialog.
     - A standard Save As dialog displays.
   - Use the standard procedures for your web browser to save the file to your local workstation.
     - Click the **Close** button to close the “file download” screen.
     - Open the file using a suitable “spreadsheet” application such as Microsoft Excel (see ***Viewing User Reports*** on **31** for details).

7. To close the “file download” screen *without* saving the Extract Report:

   - Click the **Close** button on the “file download” screen. An advisory dialog displays the message “Are you sure you want to close and lose any report information you chose?”

   - Click the **Cancel** button on the advisory dialog to close the dialog and return to the “file download” screen. (Click the **OK** button on the advisory dialog to close the dialog *and* the “file download” screen *without* saving the Extract Report.)

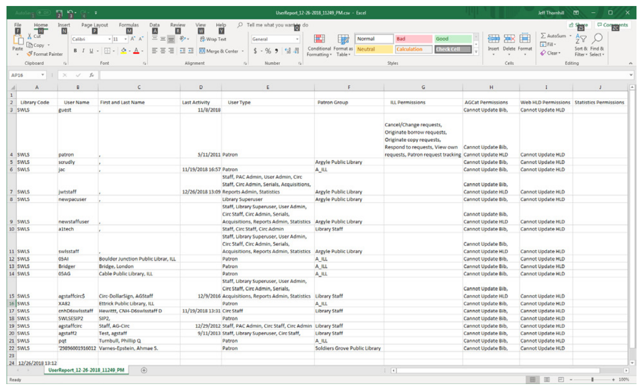
Viewing User Reports

The system generates an Extract Report file in **.csv** (comma separated value) format suitable for use with a “spreadsheet” application such as Microsoft Excel.

To view the User Report:

The User Report provides the following information:

- **Library Code** - The Library Code for the library with which the user is associated.
- **User Name** - The *unique* username assigned to the patron or staff member.
- **First and Last Name** - The user’s first and last name (last name, first name, middle initial).
- **Last Activity** - The date and time at which the user last logged in to the system.



Typical User Report

- **User Type** - The User Type categories to which the user is assigned.
- **Patron Group** - The Patron Group to which the user is assigned.
- **ILL Permissions** – For Staff users assigned to the ILL Staff User Type, lists the *detailed* ILL Permissions granted to the user (see ***Modifying ILL Permissions*** on page **14** for more information).
- **AGCat Permissions** – For Staff users assigned to the CAT Staff User Type, lists the *detailed* Cataloging Permissions granted to the user (see ***Modifying AGCat Permissions*** on page **16** for more information).
- **Web HLD Permissions** – For Staff users assigned to the CAT Staff User Type, lists the *detailed* Web HLD Permissions granted to the user (see ***Modifying Web HLD Permissions*** on page **17** for more information).
- **Statistics Permissions** – For Staff users assigned to the Statistics User Type, lists the *detailed* Statistics Permissions granted to the user (see ***Modifying Statistics Permissions*** on page **21** for more information).

Managing Patron Categories

Two options are available for “classifying” library patrons: **Patron Categories** and **Patron Groups.**

- **Patron Categories** is an *optional* feature used with ILL Request Limits. Using **Patron Categories**, you can create *one or more* categories to which patrons may be assigned. Each category is designated an “ILL Request Limit” (the *maximum* number of *active* ILL Requests allowed for a patron assigned to the category) through the ILL Administration module. Library patrons are assigned to patron categories through the User Administration module.
- **Patron Groups** lets you create *one or more* groups to which users may be assigned for accessing resources. Access to *specific* resources can be limited to *only* those users associated with a given group. Linking Resources to patron groups is accomplished through the PAC Administration module.

To access Patron Categories:

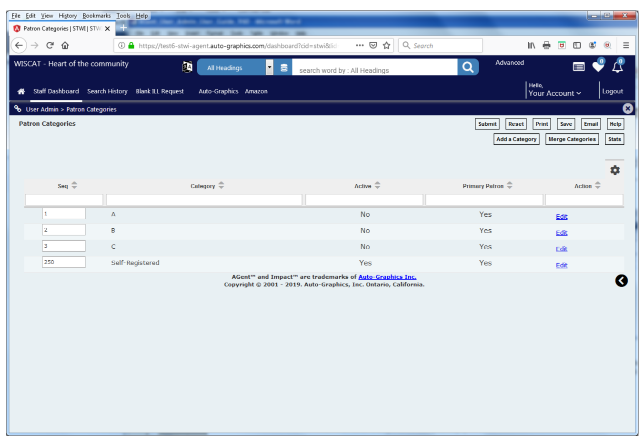
- From the **User Admin** menu, select **Patron Categories**.
  - The Patron Categories screen displays.
  - The Patron Categories screen lists the currently established Patron Categories for your library, and provides the following information for each category:

    Seq - the display sequence for the Patron Category in the **Patron Category** menu on the Add and Edit User Account screens

    Category - the name of the Patron Category

    Active - indicates whether or not the associated Patron Category is currently active (shown in the **Patron Category** menu on the Add and Edit User Account screens); either **Yes** (the associated Patron Category *is* active) or **No** (the associated Patron Category *is not* active)

    Primary Patron – TO BE DETERMINED



Patron Categories Screen

- If desired, you can reconfigure, sort and filter table content (see the ***System Basics User Guide*** for more information).
- From the Patron Categories screen, you may:
  - Set the display sequence for Patron Categories

- ○ View Patron Category statistics
- ○ Add a new Patron Category
- ○ Modify an existing Patron Category
- ○ Merge *two* Patron Categories into a *single* Patron Category
- ○ Print a copy of the Patron Categories list
- ○ Save a copy of the Patron Categories list to your local workstation
- ○ Email a copy of the Patron Categories list to yourself or to another party

Setting the Patron Category Display Sequence

You can specify the order in which patron categories are listed in **Patron Category** menus throughout the system.

To set the display sequence:

- On the Patron Categories screen, use the **Seq** text boxes to enter the desired display sequence for each patron category.
  - ○ You can enter any number from “**0**” to “**999999**” as a display sequence number.
  - ○ You can enter a *unique* display sequence number for *each* patron category, or, you can use *the same* display sequence number for *multiple* patron categories.

    If the same display sequence number is used for more than one patron category, the associated patron categories are displayed in alphabetic order.
  - ○ You can enter display sequence numbers in *numeric order* (1, 2, 3, etc.), or, you can *skip numbers* (10, 20, 30, etc.) to allow for insertion of added patron categories between existing patron categories without the need to re-sequence the entire list.
- When display sequence numbers have been entered for *all* listed patron categories, click the **Submit** button to save your changes.

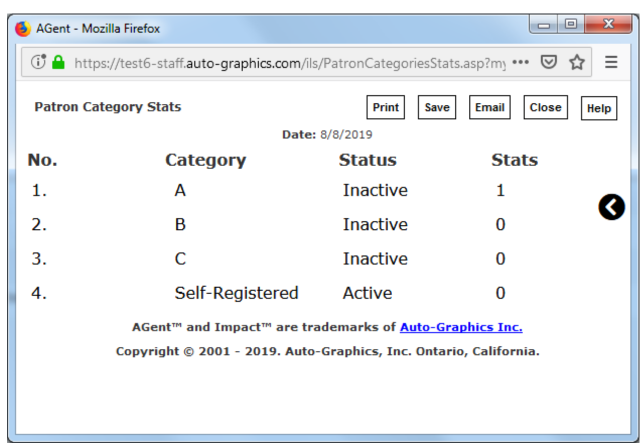
  You must enter a display sequence number for all *listed patron categories. If you* do not *enter a display sequence number for a given patron category, the display sequence value for the patron category will revert to “**0**” when you submit your changes.*

Viewing Patron Category Statistics

Patron Category statistics show the current number of patrons assigned to *each* patron category.

To view patron category statistics:

- On the Patron Categories screen, click the **Stats** button.
  - ○ The Patron Category Statistics screen displays in an *additional* browser window. The date on which the statistics report was requested is shown at the top of the screen.
- The Patron Category Statistics screen provides the following information:



Patron Category Stats Screen

  - **No.** - the sequence number of the associated patron **Category**.
  - **Category** - the name of the patron category.
  - **Status** - the current status of the associated **Category**; either **Active** or **Inactive**.
  - **Stats** - the *total number* of patrons currently assigned to the associated **Category**.
- If desired, you may:
  - Print a copy of the Patron Category statistics report (see ***Printing Patron Category/Group Parameters*** on page **40** for details)
  - Save a copy of the Patron Category statistics report to your local workstation (see ***Saving Patron Category/Group Parameters*** on page **41** for details)
  - Email a copy of the Patron Category statistics report to yourself or to another party (see ***Emailing Patron Category/Group Parameters*** on page **41** for details)
- Click the **Close** button to close the Patron Category Stats screen and return to the Patron Categories screen.

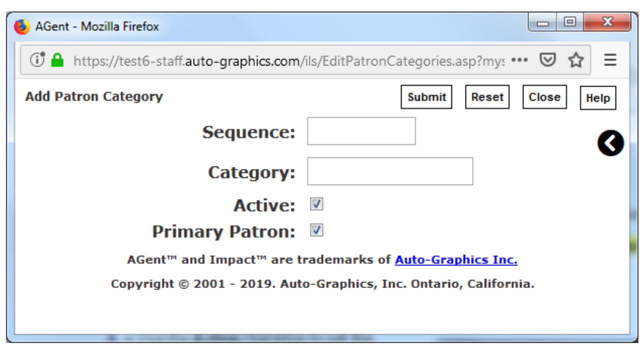
Adding a Patron Category

You can add a *new* patron category for your library.

*Once a patron category has been added to the system, it cannot be deleted. If a patron category is no longer used by your library and you wish to remove the patron category from the **Patron Category** menus throughout the system, you must set the status for the patron category to "inactive." Additionally, all patrons associated with the "inactive" category will retain the association, and the ILL limits set for the category while active.*

To add a patron category:

1. From the Patron Categories screen, click the **Add a Category** button.
   - The Add Patron Category screen displays in an *additional* browser window.
2. Enter the desired display sequence for the new patron category in the **Sequence** text box.
   - The **Sequence** number determines the order in which the category is displayed in the Patron Categories screen (see ***Setting the Patron Category Display Sequence*** on page **33** for additional information).
   - You can enter *any* number from "**0**" through "**999999**" as the display **Sequence** number.



Add Patron Category Screen

3. Enter a name for the patron category in the **Category** text box.

   *The **Category** name cannot exceed 50 characters (including spaces).*
4. Use the **Active** checkbox to set the desired status for the patron category:
   - A *checkmark* indicates the patron category is *active* (*is* available in the **Patron Category** menu on the Add and Edit User Account screens).
   - An *empty checkbox* indicates the patron category is *inactive* (*is not* available in **Patron Category** menu on the Add and Edit User Account screens).

- Clicking the checkbox repeatedly will toggle it on and off.

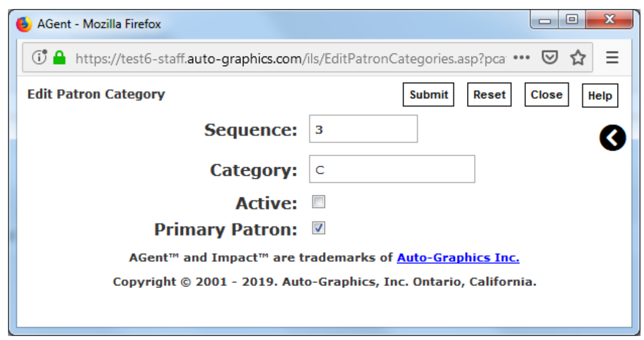
5. Use the **Primary Patron** checkbox to indicate if patrons associated with the category are "primary" patrons to the library:
   - A *checkmark* indicates patrons associated with the category *are* "primary" patrons to the library.
   - An *empty checkbox* indicates patrons associated with the category *are not* "primary" patrons to the library.
   - Clicking the checkbox repeatedly will toggle it on and off.
6. Click the **Submit** button on the Add Patron Category screen to submit the new patron category. (Click the **Close** button to close the Add Patron Category screen *without* adding the new patron category.)
   - The Add Patron Category screen closes *automatically*, and the Patron Categories screen refreshes to display the new patron category.

Editing Patron Categories

You can edit a currently defined patron category for your library.

To edit a patron category:

1. On the Patron Categories screen, click the **Edit** button for the desired patron category.
   - The Edit Patron Category screen displays in an *additional* browser window. The screen is pre-filled with current information for the selected patron category.
2. Edit the display **Sequence**, **Category**, **Active** status and **Primary Patron** designation as desired.



Edit Patron Category Screen

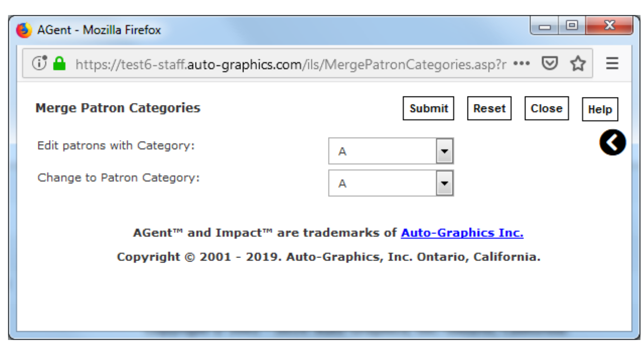
3. Click the **Submit** button on the Edit Patron Category screen to save your changes. (Click the **Close** button to close the Edit Patron Category screen *without* saving your changes.)
   - The Edit Patron Category screen closes *automatically*, and the Patron Categories screen refreshes to display your changes.

Merging Patron Categories

You can combine *two* individual patron categories into a *single* patron category by merging the contents of one category into another.

To merge patron categories:

1. On the Patron Categories screen, click the **Merge Categories** button.
   - The Merge Patron Categories screen displays in an *additional* browser window.



Merge Patron Categories Screen

2. Select the patron category you wish to *merge into* another category from the **Edit patrons with Category** drop-down menu.

   *The **Edit patrons with Category** menu lists all patron categories currently defined for your library.*

3. Select the patron category *into which* you wish to merge the previously selected category from the **Change to Patron Category** drop-down menu.

   *The **Change to Patron Category** menu lists all patron categories currently defined for your library.*

4. Click the **Submit** button on the Merge Patron Categories screen to merge the selected patron categories. (Click the **Close** button to close the Merge Patron Categories screen *without* merging the selected patron categories.)

   Be sure *to select the patron categories you wish to merge in the correct order. Patrons associated with the patron category selected in the **Edit patron with Category** menu will be* reassigned *to the patron category selected in the **Change to Patron Category** menu.*

   - The Patron Categories screen refreshes to reflect your changes.

*If the "merged" patron category (selected from the **Edit patrons with Category** menu) will no longer be used by your library, set the status for the patron category to "inactive."*

Managing Patron Groups

Two options are available for "classifying" library patrons: **Patron Categories** and **Patron Groups.**

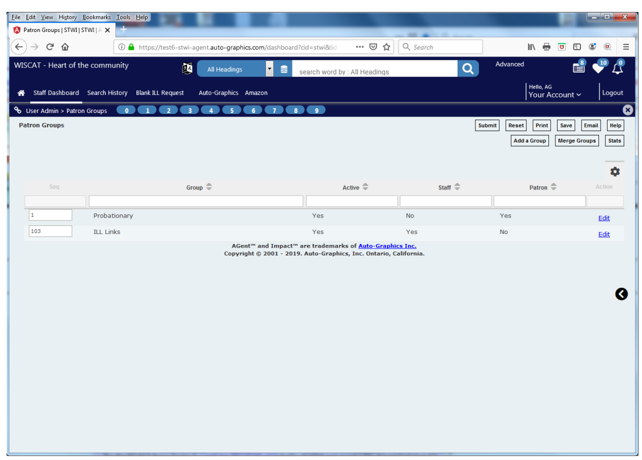
- **Patron Categories** is an *optional* feature used with ILL Request Limits. Using **Patron Categories**, you can create *one or more* categories to which patrons may be assigned. Each category is designated an "ILL Request Limit" (the *maximum* number of *active* ILL Requests allowed for a patron assigned to the category) through the ILL Administration module. Library patrons are assigned to patron categories through the User Administration module.
- **Patron Groups** lets you create *one or more* groups to which users may be assigned for accessing resources. Access to *specific* resources can be limited to *only* those users associated with a given group. Linking Resources to patron groups is accomplished through the PAC Administration module.

To access patron groups:

- From the **User Admin** menu, select **Patron Groups**.
  - The Patron Groups screen displays.
  - The Patron Groups screen lists the currently established patron groups for your library, and provides the following information for each category:

    Seq - the display sequence for the patron group in the **Patron Group** menu on the Add and Edit User Account screens

    Group - the name of the patron group



Patron Groups Screen

    Active - indicates whether or not the associated patron group is currently active (shown in the **Patron Group** menu on the Add and Edit User Account screens); either **Yes** (the associated patron group *is* active) or **No** (the associated patron group *is not* active)

Staff- indicates whether or not library staff can be assigned to the patron group; either **Yes** (library staff *can* be assigned to the patron group) or **No** (library staff *cannot* be assigned to the patron group)

Patron- indicates whether or not library patrons can be assigned to the patron group; either **Yes** (library patrons *can* be assigned to the patron group) or **No** (library patrons *cannot* be assigned to the patron group)

- If desired, you can reconfigure, sort and filter table content (see the ***System Basics User Guide*** for details).
- From the Patron Groups screen, you may select to:
  - Set the display sequence for patron groups
  - View patron group statistics
  - Add a *new* patron group
  - Edit an *existing* patron group
  - Merge *two* patron groups into a *single* patron group
  - Print a copy of the patron groups list
  - Save a copy of the patron groups list to your local workstation
  - Email a copy of the patron groups list to yourself or to another party

Setting the Patron Group Display Sequence

You can specify the order in which patron groups are listed in **Patron Group** menus throughout the system.

To set the display sequence:

- On the Patron Groups screen, use the **Seq** text boxes to enter the desired display sequence for each patron group.
  - You can enter any number from "**0**" to "**999999**" as a display sequence number.
  - You can enter a *unique* display sequence number for *each* patron group, or you can use *the same* display sequence number for *multiple* patron groups.

    If the same display sequence number is used for more than one patron group, the associated patron groups are displayed in alphabetic order.

  - You can enter display sequence numbers in *numeric order* (1, 2, 3, etc.), or you can *skip numbers* (10, 20, 30, etc.) to allow for insertion of added patron groups between existing patron groups without the need to re-sequence the entire list.
- When display sequence numbers have been entered for *all* listed patron groups, click the **Submit** button to save your changes.

  You must *enter a display sequence number for* all *listed patron groups. If you* do not *enter a display sequence number for a given patron group, the display sequence value for the patron group will revert to "**0**" when you submit your changes.*

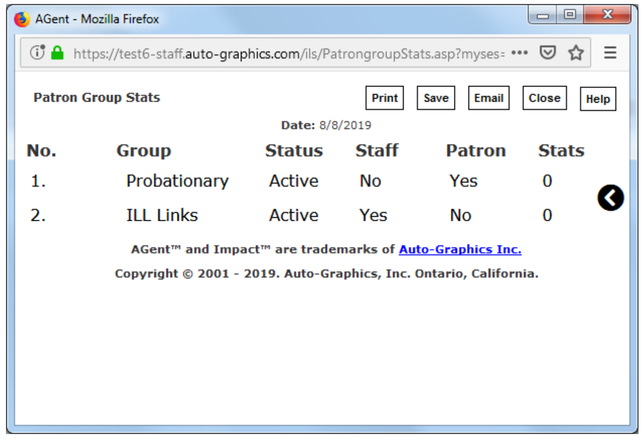
Viewing Patron Group Statistics

Patron Group statistics show the current number of patrons assigned to *each* patron group.

To view patron group statistics:

- On the Patron Groups screen, click the **Stats** button.
  - The Patron Group Statistics screen displays in an *additional* browser window. The date on which the statistics report was requested is shown at the top of the screen.

- The Patron Group Statistics screen provides the following information:
  - **No.** - the sequence number of the associated patron **Group.**
  - **Group** - the name of the patron group.
  - **Status** - the current status of the associated **Group;** either **Active** or **Inactive.**
  - **Staff** - A **Yes**/**No** value indicating whether the **Group** is available to staff.
  - **Patron** - A **Yes**/**No** value indicating whether the **Group** is available to patrons.
  - **Stats** - the *total number* of users (patrons and staff) currently assigned to the associated **Group.**



Patron Group Statistics Screen

- If desired, you may:
  - Print a copy of the Patron Group statistics report (see ***Printing Patron Category/Group Parameters*** on page **40** for details)
  - Save a copy of the Patron Group statistics report to your local workstation (see ***Saving Patron Category/Group Parameters*** on page **41** for details)
  - Email a copy of the Patron Group statistics report to yourself or to another party (see ***Emailing Patron Category/Group Parameters*** on page **41** for details)
- Click the **Close** button to close the Patron Group Statistics screen and return to the Patron Groups screen.

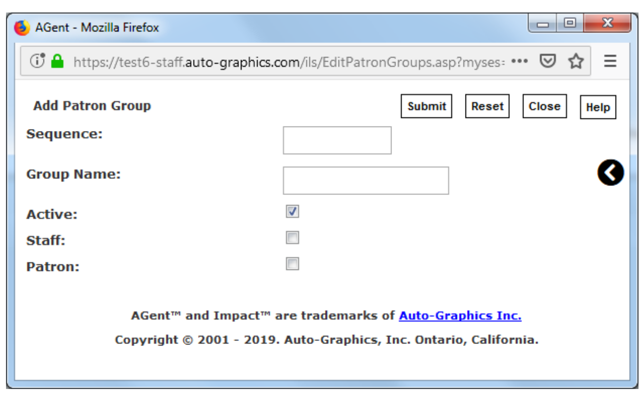
Adding a Patron Group

You can add a *new* patron group for your library.

Once a patron group has been added to the system, it cannot be deleted. If a patron group is no longer used by your library and you wish to remove the patron group from the ***Patron Group*** *menus throughout the system, you must set the status of the patron group to "inactive."*

To add a patron group:

1. On the Patron Groups screen, click the **Add a Group** button.
   - The Add Patron Group screen displays in an *additional* browser window.
2. Enter the desired display sequence number for the new patron group in the **Sequence** text box.
   - The **Sequence** number determines the order in which the group is displayed in the Patron Groups screen (see ***Setting the Patron Group Display Sequence*** on page **37** for additional information).



Add Patron Group Screen

- You can enter *any* number from "**0**" through "**999999**" as the display **Sequence** number.

3. Enter a name for the new patron group in the **Group Name** text box.

   *The **Group Name** cannot exceed 50 characters (including spaces).*

4. Use the **Active** checkbox to set the desired status for the patron group:

   - A *checkmark* indicates the patron group is *active* (is available in patron group menus throughout the system).
   - An *empty checkbox* indicates the patron group is *not active* (is *not* available in patron group menus throughout the system).
   - Clicking a checkbox repeatedly will toggle it on and off.

5. Use the **Staff** checkbox to indicate whether library staff can be assigned to the patron group.

   - A *checkmark* indicates library staff *can* be assigned to the patron group.
   - An *empty checkbox* indicates library staff *cannot* be assigned to the patron group.
   - Clicking a checkbox repeatedly will toggle it on and off.

6. Use the **Patron** checkbox to indicate whether library patrons can be assigned to the patron group.

   - A *checkmark* indicates library patrons *can* be assigned to the patron group.
   - An *empty checkbox* indicates library patrons *cannot* be assigned to the patron group.
   - Clicking a checkbox repeatedly will toggle it on and off.

7. Click the **Submit** button on the Add Patron Group screen to submit the new patron group. (Click the **Close** button to close the Add Patron Group screen *without* adding the new patron group.)

   - The Patron Groups screen refreshes to display the new patron group.

Editing Patron Groups

You can change the name, display sequence, or status of *any* existing patron group.

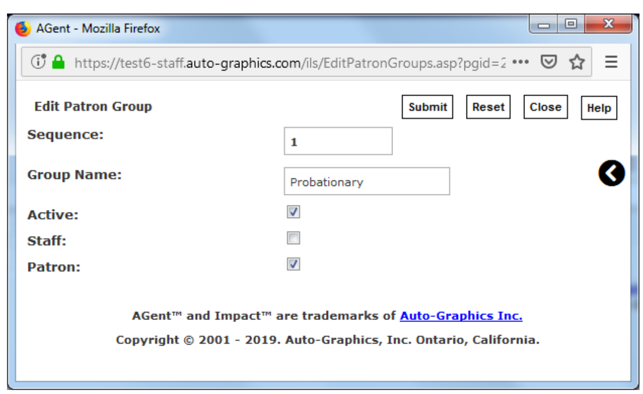
To edit a patron group:

1. On the Patron Groups screen, click the **Edit** button for the patron group you wish to edit.

   - The Edit Patron Group screen displays in an *additional* browser window. The screen is pre-filled with the current values for the selected **Group**.

2. Edit the display **Sequence**, **Group Name**, **Active**, **Staff**, and **Patron** status as desired.

   - If *one or more* library patrons or staff members are currently assigned to the patron group, the **Active** and **Staff** and/or **Patron** fields are *read only*, and cannot be changed.



Edit Patron Group Screen

3. Click the **Submit** button on the Edit Patron Group screen to submit your changes. (Click the **Close** button to close the Edit Patron Group screen *without* saving your changes.)

   - The Patron Groups screen refreshes to display your changes.

Merging Patron Groups

You can combine *two* individual Patron Groups into a *single* patron group by merging the patrons from one group into another.

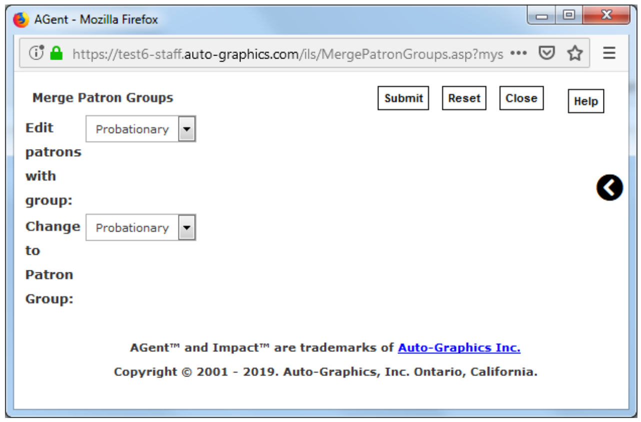
To merge patron groups:

1. On the Patron Groups screen, click the **Merge Groups** button.

   - The Merge Patron Groups screen displays in an *additional* browser window.

2. Select the patron group you wish to *merge into* another group from the **Edit patrons with group** drop-down menu.

   *The **Edit patrons with group** menu lists* all *patron groups currently defined for your library.*



Merge Patron Groups Screen

3. Select the patron group *into which* you wish to merge the previously selected Group from the **Change to Patron Group** drop-down menu.

   *The **Change to Patron Group** menu lists all patron groups currently defined for your library.*

4. Click the **Submit** button on the Merge Patron Groups screen to merge the selected groups.

   Be sure *to select the patron groups you wish to merge in the correct order. Patrons in the group selected from the **Edit patrons with group** menu will be* re-identified *as patrons of the group selected from the **Change to Patron Group** menu.*

   - The Patron Groups screen refreshes to display your changes.

*If the "merged" patron group (selected from the **Edit patrons with group** menu) will no longer be used by your library, set the status for the patron group to "inactive."*

Printing Patron Category/Group Parameters

You can print a copy of the Patron Category/Group list or Patron Category/Group Stats.

To print Patron Category/Group parameters:

1. On the desired parameters screen, click the button to display the staff screen toolbar.

2. Click the **Print** button to print the current screen.

   - A standard Windows Print dialog displays.

3. Make the appropriate selections on the Print dialog, then click the **OK** or **Print** button, as applicable. (Click the **Cancel** button to cancel the print request.)

Saving Patron Category/Group Parameters

You can save a copy of the Patron Category/Group list or Patron Category/Group Stats to your local workstation.

To save Patron Category/Group parameters:

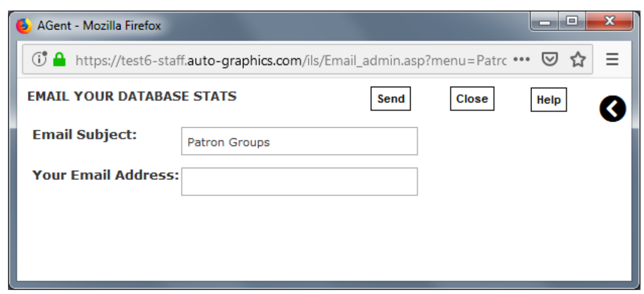
1. On the desired parameters screen, click the **Save** button.
   - A File Download dialog displays.
2. Select the “save” option on the File Download dialog.
   - A standard Save As dialog displays.
3. Use the standard procedures for your web browser to save the file to your local workstation.

Emailing Patron Category/Group Parameters

You can email a copy of the Patron Category/Group list or Patron Category/Group Stats to yourself or another staff member.

To email Patron Category/Group parameters:

1. On the desired parameters screen, click the **Email** button.
   - The Email Address screen displays in an *additional* browser window.
2. Enter a subject line for the email in the **Email Subject** text box.
3. Enter your email address (or the email address of the person to whom you wish to send the statistics report) in the **Your Email Address** text box.
4. Click the **Send** button to send of copy of the selected circulation parameters to the specified email address.
   - The message “An Email was sent to: (*email address*)” displays. Click the **Close** button to close the message.



Email Address Screen

Chapter 3. MAINTAINING THE USER DATABASE

Overview

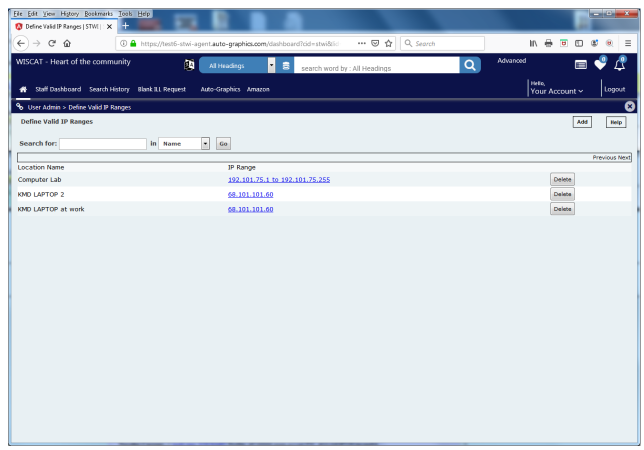
User Administration lets you define valid IP ranges for authenticated access to the system, and to maintain RPA error codes. You may also delete obsolete (inactive) users from the database.

Defining Valid IP Ranges

If your library utilizes "IP authentication," you can use the **Define Valid IP Ranges** function to define the IP ranges for which "generic" patron access to the system will be granted.

To view IP ranges:

1. From the **User Admin** menu, select **Define Valid IP Ranges**.
   - The Define Valid IP Ranges screen displays. The screen lists *all currently defined* IP Ranges for your library, in alphabetic order, by **Location Name**. If *multiple* IP addresses have been assigned the *same* **Location Name**, the IP addresses with the same **Location Name** are sorted in numeric order.
   - The screen shows the **Location Name** and **IP Range** for *all* currently established IP ranges for your library.



Define Valid IP Ranges Screen

2. Use the **Previous** and **Next** links to view other pages of the list.
   - The **Previous** and **Next** links are active *only* when the list of Valid IP ranges contains *more than 20* defined address/ranges.
3. Use the **Search for** function to locate a *specific* IP Range in the list. You may search for IP Ranges by **Location Name** or **IP Address**.
   - Enter the desired **Location Name** or **IP Address** in the **Search for** text box.
     - When searching the Valid IP Ranges list, the system reads the **Search for** term as a string of characters (rather than as separate words), reading each character from left to right. You may enter either a partial *or* complete **Location Name** or **IP Address** as the search criteria.
   - Select **Name** or **IP Address** from the **in** menu, as appropriate.
   - Click the **Go** button.

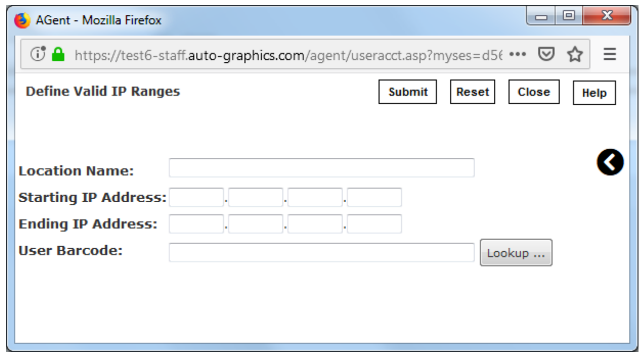
     *When searching by **IP Address**, the list of Valid IP Ranges is automatically resorted, in numeric order, by **IP Range**.*
     - The Define Valid IP Ranges screen refreshes.

- If an *exact* match *is* located, the first occurrence of the **Location Name** or **IP Address**, as appropriate, appears as the first entry in the list.
- If an *exact* match *is not* located, the first entry in the list which *immediately* follows the **Location Name** alphabetically, or **IP Range** numerically, as appropriate, appears as the first entry in the list.

*To resort the list by either **Location Name** or **IP Address**, leave the **Search for** text box blank, select the desired sort format from the **in** menu (either **Name** or **IP Address**), then click the **Go** button.*

To add an IP range:

1. From the Define Valid IP Ranges screen, click the **Add** button.
   - The Add IP Range screen displays in an *additional* browser window.
2. Enter a name to identify the IP address range in the **Location Name** text box.
   - The **Location Name** may include both alphabetic and numeric characters. The **Location Name** may be a *maximum* of 50 characters in length, *including spaces*.



Add IP Range Screen

3. Enter the desired IP address (or address range) in the **Starting IP Address** and **Ending IP Address** text boxes.
   - To enter an *IP address range*, enter the desired *starting* IP address in the **Starting IP Address** text boxes; enter the desired *ending* IP address in the **Ending IP Address** text boxes.

     *The **Ending IP Address** must be greater than the **Starting IP Address**. You may use only the third and fourth bytes of the IP Addresses to specify an IP address range; e.g., 208.193.**118.1** to 208.193.**119.255**.*
   - To enter a *single IP address*, enter the desired address in the **Starting IP Address** text box.
4. To associate the IP range with a specific user, enter the user's barcode in the **User Barcode** text box.
   - If desired, you can use the Lookup feature to locate the desired User Barcode (see ***Using User Barcode Lookup*** on page **45** for details).
5. Click the **Submit** button to add the specified IP address(es) to the list of valid IP ranges for your library.
   - The Add IP Range screen closes *automatically*, and the Define Valid IP Ranges screen refreshes to display your changes.

     *If you enter an improperly formatted IP address in the **Starting IP Range** or **Ending IP Range** text boxes, an error dialog displays the message "Invalid (Starting/Ending) IP Address. Please reenter." Click the **OK** button to close the message, and re-enter the **Starting IP Address** or **Ending IP Address**, as appropriate.*

     *If the **Starting IP Address** is greater than the **Ending IP Address**, an error dialog displays the message "Ending IP MUST be greater than Starting IP." Click the **OK** button to close the message, and re-enter the **Starting IP Address** and/or **Ending IP Address**, as appropriate.*
6. Repeat steps **1** through **5** to add *additional* IP addresses.

To edit a current IP address:

1. From the Define Valid IP Ranges screen, click the **IP Range** link for the IP range you wish to edit.
   - The Edit IP Range screen displays in an *additional* browser window.
   - The screen is pre-filled with the current values for the selected IP range.
2. Edit the **Location Name**, **Starting IP Address**, **Ending IP Address** and **User Barcode** as desired.
3. Click the **Submit** button to submit your changes to the IP range.
   - The Edit IP Range screen closes *automatically*, and the Define Valid IP Ranges screen refreshes to display your changes.

     *If you enter an improperly formatted IP address in the **Starting IP Range** or **Ending IP Range** text boxes, an error dialog displays the message "Invalid (Starting/Ending) IP Address. Please reenter." Click the **OK** button to close the message, and re-enter the **Starting IP Address** or **Ending IP Address**, as appropriate.*

     *If the **Starting IP Address** is greater than the **Ending IP Address**, an error dialog displays the message "Ending IP MUST be greater than Starting IP." Click the **OK** button to close the message, and re-enter the **Starting IP Address** and/or **Ending IP Address**, as appropriate.*
4. Repeat steps **1** through **3** to edit *additional* IP addresses.

To delete a current IP range:

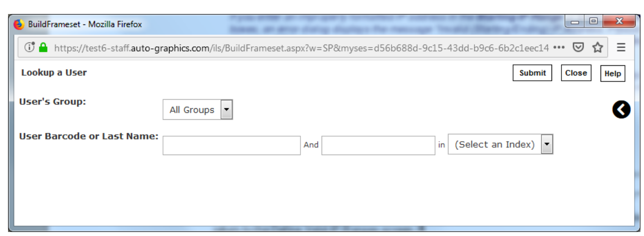
1. From the Define Valid IP Ranges screen, click the **Delete** button for the IP range you wish to delete.
   - A confirmation dialog displays the message "Are you sure you want to delete this Range?"
2. Click the **OK** button to delete the selected IP Range. (Click the **Cancel** button to cancel the deletion and return to the Define Valid IP Ranges screen.)
   - The Define Valid IP Ranges screen refreshes with the selected IP Range removed from the list.
3. Repeat steps **1** and **2** to delete *additional* IP ranges.

Using User Barcode Lookup

If you are not sure of the **User Barcode** for which you wish to search, you can use the user barcode **Lookup** feature to locate the desired user barcode.

To use User Barcode Lookup:

1. Click the **User Barcode - Lookup** button on Search IP Ranges screen.
   - The Lookup a User screen displays in an *additional* browser window.
2. Enter the desired search criteria:
   - To limit the list to *only* those users associated with a specific user group, select the desired user group from the **User's Group** menu, then click the **Search** button.
     - Select **All Groups** to display users for *all* user groups.



Lookup a User Screen

  - Select the desired user group to display users for the associated group *only*.

- To locate a specific user by *barcode* or *name*, enter the user's barcode or last name in the **User Barcode or Last Name** text box. To view a list of *all* users associated with the currently specified **User's Group**, leave the **User Barcode or Last Name** text box *blank*.

When searching by a user's name, you may enter a complete *or* partial *last name.*

- To search *other fields* of the user records, enter the desired search term in the **And** text box, and select the desired search index (**City**, **Email Address**, etc.) from the **in** menu.

3. Click the **Submit** button to submit your search of the user database.

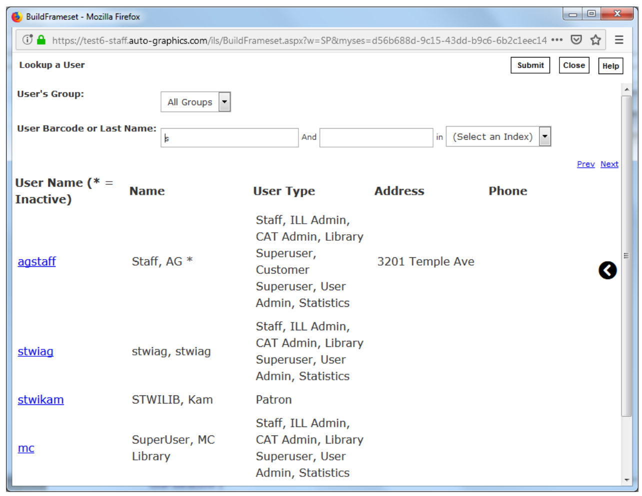
- The screen refreshes to display the User Account List. The User Account List shows a listing of *all users* that match your search criteria.

- Use the **Prev** and **Next** links to view other pages of the list.

*The **Prev** and **Next** links are active* only *if your library's user database contains* more than 20 *users.*

4. Click the **User Name** for the user barcode for which you wish to search.

- The Lookup a User screen closes, and the selected **User Name** is entered in the **User Barcode** text box on the Search IP ranges screen *automatically*.



User Account List

Maintaining RPA Error Codes

*This feature is applicable to systems utilizing remote patron authentication based on a **Username or Barcode** and **Password or PIN** retrieved from a library's remote Standard Interchange Protocol (SIP2) user database.*

Remote patron authentication in RESEARCHit is accomplished by passing the **Username or Barcode** and **Password or PIN** from the login screen, as a query, to a library's *remote* Integrated Library System using the Standard Interface Protocol (SIP2). The SIP2 protocol supports the transmission of patron and other circulation data between systems. The RESEARCHit query is used to search the *remote* ILS user database, and to return the appropriate patron record to RESEARCHit. If the retrieved patron record shows the patron as being "in good standing", RESEARCHit permits an *authenticated* login to the system. If the patron record shows the patron as being "blocked" (based on patron codes returned by the *remote* ILS system), RESEARCHit permits *unauthenticated* login to the system as either a "generic" patron or as a guest.

A copy of each patron record returned by the remote ILS system is also added to the RESEARCHit database. In the event the remote ILS database is unavailable, or if the SIP interface is not functioning, RESEARCHit queries the RESEARCHit database for login to the system. The granting or denying of authenticated access is accomplished in a manner similar to that described above.

The **Maintain RPA Error Codes** function lets you define which patron error codes (returned in the patron record from the *remote* ILS user database) will result in a patron being "blocked" from *authenticated* access to the system. You may also provide a text message to be displayed to "blocked" users, and to determine the appropriate *unauthenticated* access mode for "blocked" users; either **Patron** or **Guest**.

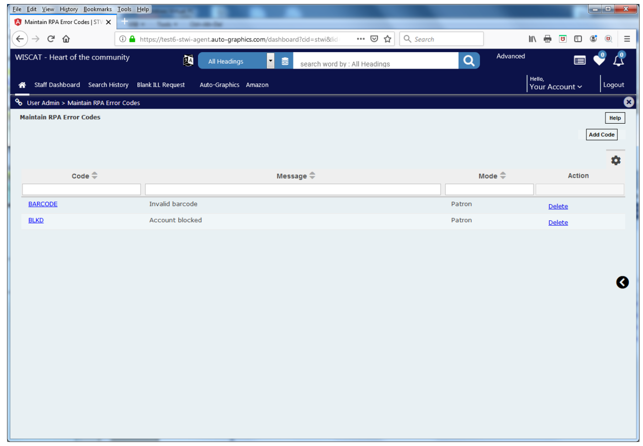
*You must know the specific error codes returned by your library's ILS in order to use the **Maintain RPA Error Codes** function.*

Adding a "Block" Code

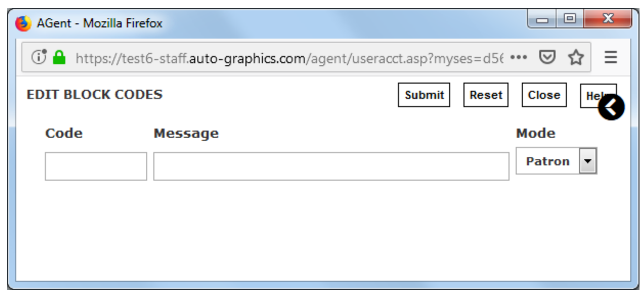
You can add a *new* "block" code to your library's database.

To add a "block" code:

1. From the **User Admin** menu, select **Maintain RPA Error Codes**.
   - The Maintain RPA Error Codes screen displays.
   - The Maintain RPA Error Codes screen lists all *currently defined* "block" codes for your library.
   - If desired, you can reconfigure, sort and filter table content (see the ***System Basics User Guide*** for details).
2. Click the **Add Code** button.
   - The Edit Block Codes screen displays in an *additional* browser window.
3. Enter the code you wish to trigger a "patron block" in the **Code** text box.
4. Enter the message you wish to be displayed to patrons who are "blocked" from *authenticated* access to the system as a result of the associated **Code** in the **Message** test box.
5. Select the desired *unauthenticated* login mode for patrons who are "blocked" from *authenticated* access to the system as a result of the associated **Code** from the **Mode** menu; either **Guest** or "generic" **Patron**.



Maintain RPA Error Codes Screen



Edit Block Codes Screen

6. Click the **Submit** button to add the "block" code to your library's database. (Click the **Cancel** button *before* submitting to cancel the addition.)
   - The Edit Block Codes screen closes *automatically*, and the Maintain RPA Error Codes screen refreshes to display the added code.
7. Repeat steps **1** through **6** to add *additional* codes.

Editing "Block" Codes

You can edit an *existing* "block" code for your library.

To edit a "block" code:

1. From the **User Admin** menu, select **Maintain RPA Error Codes**.
   - The Maintain RPA Error Codes screen displays.
   - The Maintain RPA Error Codes screen lists all *currently defined* "block" codes for your library.

2. Click the **Code** you wish to edit.
    - The Edit Block Codes screen displays in an *additional* browser window.
    - The Edit Block Codes screen is pre-filled with current information for the code.
3. Edit the **Code**, **Message** and login **Mode**, as desired (see ***Adding a "Block" Code*** on **47** for details).
4. Click the **Submit** button to submit your changes to the "block" code. (Click the **Cancel** button *before* submitting to cancel your changes.)
    - The Edit Block Codes screen closes *automatically*, and the Block Codes screen refreshes to display your changes.
5. Repeat steps **2** through **4** to edit *additional* codes.

Deleting "Block" Codes

You can delete an *existing* "block" code from your library's database.

To delete a "block" code:

1. From the **User Admin** menu, select **Maintain RPA Error Codes**.
    - The Maintain RPA Error Codes screen displays.
    - The Maintain RPA Error Codes screen lists all *currently defined* "block" codes for your library.
2. Click the **Delete** button for the code you wish to delete.
    - A confirmation dialog displays the message "Continue to Delete Code (*code*)?".
3. Click the **OK** button on the confirmation dialog to delete the "block" code from your library's database. (Click the **Cancel** button to cancel the deletion.)
    - The Block Codes screen refreshes with the deleted code removed from the list.
4. Repeat steps **2** and **3** to delete *additional* "block" codes.

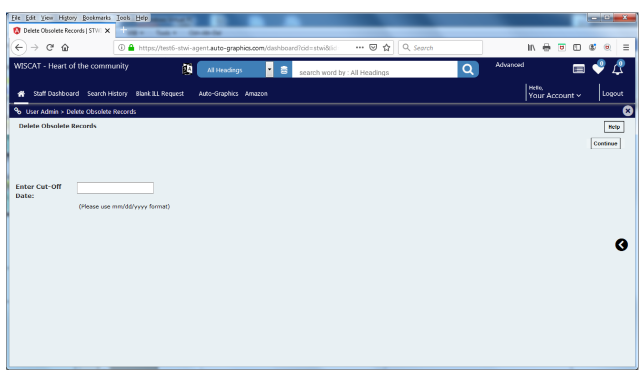
Deleting Inactive Users

You can delete inactive (obsolete) user records from your library's database based on a specified cutoff date. User records for all users who *have not* logged into the system from the specified date to the current date are deleted from your library's database.

The User Administrator and "generic" patron user records will not be deleted from the database under any circumstances.

To delete inactive users:

1. From the **User Admin** menu, select **Delete Obsolete Records**.
    - The Delete Obsolete Records screen displays.
2. Enter the desired cutoff date in the **Enter Cut-Off Date** text box.



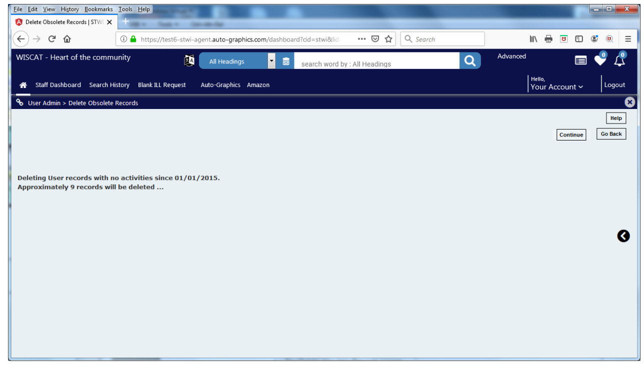
Delete Obsolete Records Screen

*Enter the cutoff date using the format **mm/dd/yyyy**.* Be sure *to include the slashes "/" when entering the cutoff date.*

- For example, to delete user records for all users that have not logged into the system since January 1, 2002, enter **01/01/2012** in the **Enter Cut-Off Date** text box.

3. Click the **Continue** button. (Click the **Cancel** button to cancel the deletion and close the Delete Obsolete Records window.)

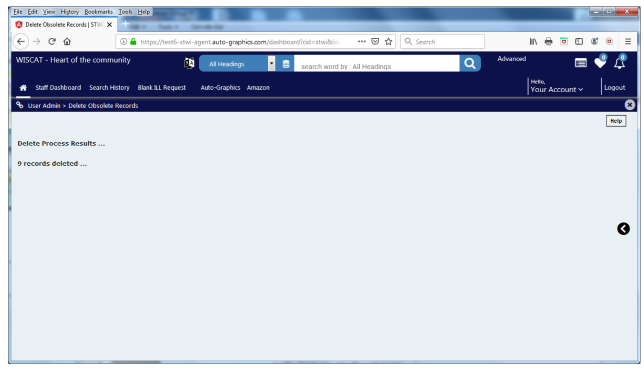
   - The Delete Obsolete Records screen refreshes to display a confirmation message indicating the *estimated* number of user records that will be deleted from your library's database.



Confirmation Message

4. Click the **Continue** button to delete the inactive records. (Click **Go Back** if you wish to enter a *different* cutoff date.)

   - The Delete Obsolete Records screen refreshes to display a status message indicating the *actual* number of user records deleted from your library's database.



Status Message

5. Click the **Close** button to close the status message.

Chapter 4. CUSTOMER SUPERUSER

Overview

In addition to the standard features and functions available to *all* User Administrators, Customer SuperUsers can use the User Administration module to maintain the *default* user record form, and to generate user database reports for a *selected* library or for *all libraries* within a consortium or collective.

This chapter provides the procedures to:

- Edit user accounts for all libraries
- Manage Regional SuperUsers
- Configure the default user record form
- Generate user reports
- Search IP ranges

Global Edit User Accounts

The **Global Edit User Accounts** function lets you access and edit the user record for *any* current authenticated user for any library within your RESEARCHit or SHAREit system.

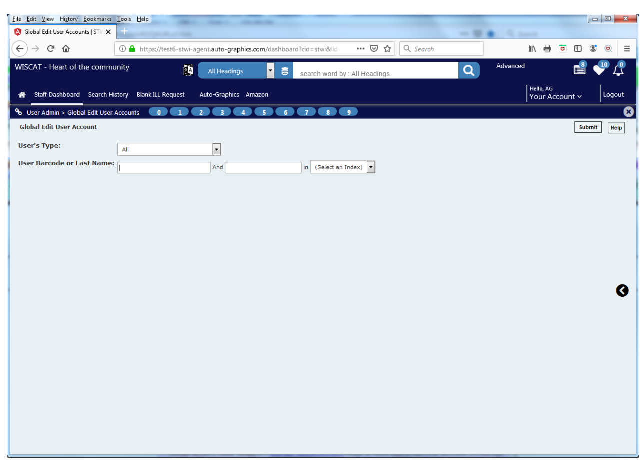
*You cannot change the **Username or Barcode** for a current authenticated user.*

Viewing the User Account List

The User Account List shows *all* current authenticated users for your RESEARCHit or SHAREit system, in alphabetic order by **Name** (last name first), and includes the **User Name**, the **Library ID** under which the user is registered, the user's full **Name** and **User Type** (user group assignments) and the **Address** and **Phone** number for each user. *Disabled users* are indicated by an asterisk "*" following the **User Name**. From the User Account list, you may choose to edit the record for a current authenticated user (see ***Editing User Records*** on **25** for details) or delete an authenticated user from your library's database (see ***Deleting Users*** on page **29** for details).

To view the User Account list:

1. From the **User Admin** menu, select **Global Edit User Accounts**.
   - The Global Edit User Account Search Screen displays.
2. Enter the desired search criteria:
   - To limit the list to *only* those users associated with a specific user group, select the desired user group from the **User's Type** menu, then click the **Search** button.
     - Select **All** to display users for *all* user groups.



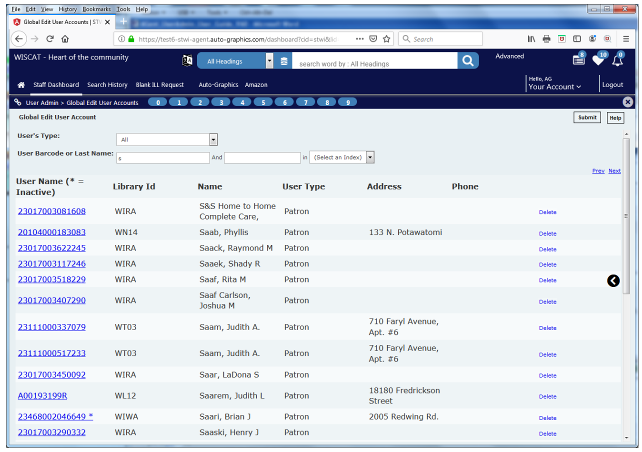
Global Edit User Account Search Screen

- ○ Select **Patron** or the desired staff mode (**PAC Admin**, **ILL Admin**, etc.) to display users for the associated mode.

- To locate a specific user by *barcode* or *name*, enter the user's barcode or last name in the **User Barcode or Last Name** text box. To view a list of *all* users associated with the currently specified **User's Type**, leave the **User Barcode or Last Name** text box *blank*.

When searching by a user's name, you may enter a complete or partial last name.

- To search *other fields* of the user records, enter the desired search term in the **And** text box, and select the desired search index (**City**, **Email Address**, etc.) from the **in** menu.



User Account List

3. Click the **Submit** button to submit your search of the user database.

- The screen refreshes to display the User Account List. The User Account List shows a listing of *all users* that match your search criteria.
- Use the **Prev** and **Next** links to view other pages of the list.

Managing Regional SuperUsers

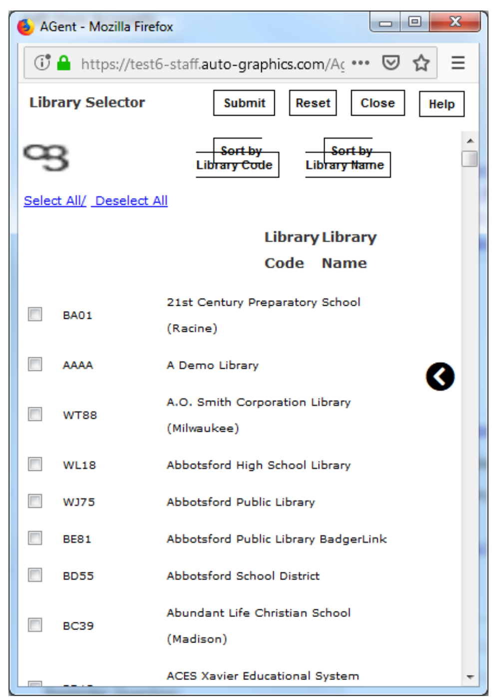
When you add a *new* user and assign **Regional SuperUser** permissions (see ***Adding a User*** on **9** for details), the Add User Permissions - Library List screen displays. You must add the libraries with which the Regional SuperUser will be associated. The **Select Libraries** button displays the Library Selector screen. The screen shows a list of all libraries for your consortium or collective from which you may make library selections.

*When editing a User Record, the Library Selector is accessed using the **Regional SuperUser - Select Libraries** link from an active User Record.*

To select libraries for a Regional SuperUser:

1. Click the **Select Libraries** button on the Add User Permissions - Library List screen (when adding a new user) or click the **Regional SuperUser - Select Libraries** link on an active User Record (when editing an existing user).

- The Library Selector screen displays in an *additional* browser window.
- The Library Selector screen shows a list of all libraries for your consortium or collective from which you may make library selections.



Library Selector Screen

- Click the **Sort by Library Code** button to sort the list alphabetically by **Library Code**.

- Click the **Sort by Library Name** button to sort the list alphabetically by **Library Name**.

2. Use the checkboxes to select the libraries for which the user can perform Global User Permissions Maintenance functions.

   - A *checkmark* indicates the user *can* perform Global User Permissions Maintenance functions for the associated library.
   - An *empty checkbox* indicates the user *cannot* perform Global User Permissions Maintenance functions for the associated library.
   - Clicking a checkbox repeatedly will toggle it on and off.
   - To *select* the checkboxes for *all libraries*, click the **Select All** link.
   - To *deselect* the checkboxes for *all libraries*, click the **Deselect All** link.

3. When all desired library selections have been made, click the **Submit** button to save your changes.

   - The Library Selector closes *automatically*, and the previous screen refreshes to display your changes.

Configuring the User Record

The User Record is comprised of *up to 23* preset data fields. The **Configure User Record** function lets you establish the *specific* fields you wish included in the user record, configure "variable content" data fields, determine the order in which the selected fields are displayed, and configure the User Record display shown to *authenticated* users via the **My Account** function (see the ***Search User Guide*** for more information).

To configure the *default* user record form:

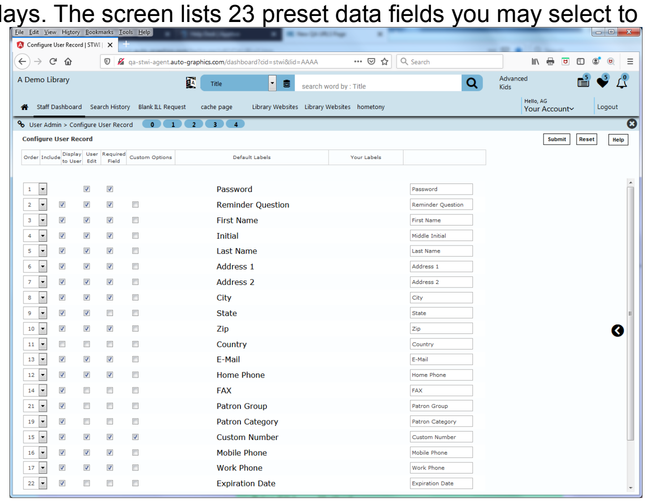
The default user record form is used by all libraries within a consortium or collective. The form cannot be modified by individual libraries.

*The **Language** function on the Configure User Record screen is available only for those libraries, consortia or collectives that have purchased the optional multi-language functionality.*

1. From the **User Admin** menu, select **Configure User Record**.

   - The Configure User Record screen displays. The screen lists 23 preset data fields you may select to include in the *default* User Record form for your consortium or collective.

     *The **Username** field (not included on the Configure User Record screen) is mandatory, and is always included in the User Record form.*



Configure User Record Screen

2. Use the **Include** and **Required Field** checkboxes to select the data fields you wish to include in the *default* User Record form.

   - A *checkmark* indicates the associated option *is* selected; an *empty checkbox* indicates the associated option *is not* selected. Clicking a checkbox repeatedly will toggle it on and off.

- Select the **Include** checkbox for each data field you wish to include in the *default* User Record form.

  *The **Password** field is always included in the User Record form, and cannot be deselected.*

- Select the **Required Field** checkbox for each data field you wish to configure as a "mandatory entry" field.

  *If a data field is selected as a **Required Field**, a User Record cannot be saved unless data is entered in the field.*

  *The **Password** field is always a "mandatory field", and cannot be deselected.*

3. Use the **Display to User** and **User Edit** checkboxes to configure the User Record displayed to patrons or staff members using the **Your Account** function.

   - A *checkmark* ☑ indicates the associated option *is* selected; an *empty checkbox* ☐ indicates the associated option *is not* selected. Clicking a checkbox repeatedly will toggle it on and off.
   - Select the **Display to User** checkbox for each field that will be displayed to patrons or staff members when viewing their User Record using the **Your Account** function.
     - The **Include** checkbox must be selected for any field for which you have selected the **Display to User** checkbox.
   - Use the **User Edit** checkboxes to select the fields that may be edited by patrons or staff members when viewing their User Record using the **Your Account** function.
     - The **Include** and **Display to User** checkboxes *must* be selected for any field for which you have selected the **User Edit** checkbox.

4. Use the **Order** menus to establish the order in which selected fields will be listed in the User Record.

   - Each **Included** field *must* be assigned a *unique* **Order** (display sequence) number.

5. The **Default Labels** fields show the *default* names for the associated User Record fields. If desired, use the **Your Labels** text boxes to specify a *different* name for the associated field.

6. When all desired information has been entered, click the **Submit** button to save your changes.

   - The User Administration "Welcome" screen displays.

*If you assign the same **Order** (display sequence) to two or more fields, an error dialog displays the message "You cannot have 2 fields with the identical order" when you submit your changes. Click the **OK** button on the error dialog to close the dialog and return to the Configure User Record screen. Make sure each **Included** field has a unique **Order** (display sequence) number, then resubmit the form.*

*If you select the **Display to User**, **User Edit** and/or **Required Field** checkbox(es) for a field for which the **Include** checkbox is not selected, an error dialog displays the message "(field name) - Include must be checked in order for others to be checked" when you submit your changes. Click the **OK** button on the error dialog to close the dialog and return to the Configure User Record screen. Select the **Include** checkbox, or unselected the **Display to User**, **User Edit** and/or **Required Field** checkbox(es) for the affected fields, as desired, then resubmit the form.*

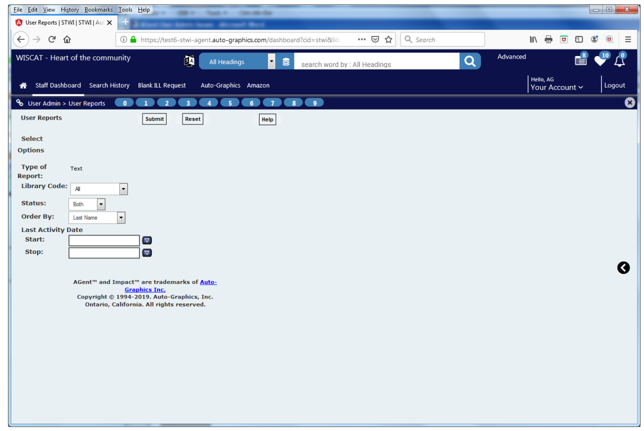
*If you select the **User Edit** for a field for which the **Display to User** checkbox is not selected, an error dialog displays the message "(field name) - If User Edit is Checked, then Display to User must also be checked" when you submit your changes. Click the **OK** button on the error dialog to close the dialog and return to the Configure User Record screen. Select the **Display to User** checkbox, or unselected the **User Edit**, checkbox for the affected fields, as desired, then resubmit the form.*

Generating User Reports

The **User Reports** function lets you generate a *customized* listings of *authenticated* users for *any* single library in the consortium or collective, or a combined report for *all* libraries in the consortium or collective, based on the criteria you specify. Reports are displayed on-screen.

To generate a user report:

1. From the **User Admin** menu, (see ***The User Admin Menu*** on page **5** for details), select **User Reports**.
   - The User Reports screen displays.
2. Select the library for which you wish to generate the report from the **Library Code** menu.
   - The **Library Code** menu lists the library codes for *all* libraries in your consortium or collective. You may generate a report for a *single* selected library, or for **All** libraries combined.
   - The *default* selection for **Library Code** is **All**.



User Reports Screen

3. Select the desired current account status for users you wish included in the report from the **Status** menu; either **Enabled**, **Disabled** or **Both**.

   Account status is set in the User Record for each *authenticated user (patron or staff member).*

   - The *default* selection for **Status** is **Both**.
4. Select the desired sort order for the report from the **Order By** menu; either alphabetically by **Last Name**, alphabetically by **Username**, chronologically by **Last Activity Date** or alphabetically by **Library Code**.
   - The *default* value for **Order By** is **Last Name**.
5. If desired, use the **Last Activity Date** text boxes to limit the report to users who last logged into the system on a specified day (or range of days).
   - If desired, click the button to enter a **Start** date using the Date Entry Calendar (see the ***System Basics User Guide*** for details).
   - If desired, click the button to enter a Stop date using the Date Entry Calendar (see the ***System Basics User Guide*** for details).
   - To limit the last activity date range to a *single* day, enter the *same date* in *both* the **Start** and **Stop** text boxes.
6. When all desired report parameters have been specified, click the **Submit** button to submit your report request.
   - The system generates an Extract Report file in **.csv** (comma separated value) format suitable for use with a "spreadsheet" application such as Microsoft Excel. An "Export to File" screen displays in an *additional* browser window or tab while the file is being created. A confirmation message display when file creation is completed.
7. To download the Extract Report to your local workstation:
   - Click the **Save** button on the “file download” screen to save the file to your workstation.
     - A File Download dialog displays.
   - Select the “save” option on the File Download dialog.
     - A standard Save As dialog displays.

- Use the standard procedures for your web browser to save the file to your local workstation.
  - Click the **Close** button to close the "file download" screen.
  - Open the file using a suitable "spreadsheet" application such as Microsoft Excel (see ***Viewing User Reports*** on **31** for details).

8. To close the "file download" screen *without* saving the Extract Report:
   - Click the **Close** button on the "file download" screen. An advisory dialog displays the message "Are you sure you want to close and lose any report information you chose?"
   - Click the **Cancel** button on the advisory dialog to close the dialog and return to the "file download" screen. (Click the **OK** button on the advisory dialog to close the dialog *and* the "file download" screen *without* saving the Extract Report.)

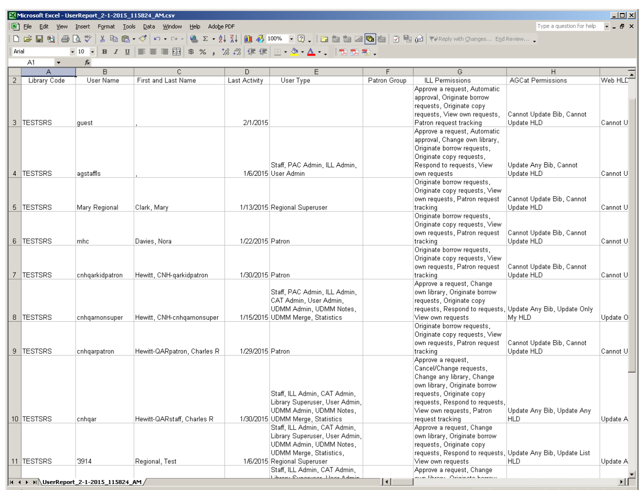
Viewing User Reports

The system generates an Extract Report file in **.csv** (comma separated value) format suitable for use with a "spreadsheet" application such as Microsoft Excel.

To view the User Report:

The User Report provides the following information:

- **Library Code** - The Library Code for the library with which the user is associated.
- **User Name** - The *unique* username assigned to the patron or staff member.
- **First and Last Name** - The user's first and last name (last name, first name, middle initial).
- **Last Activity** - The date and time at which the user last logged in to the system.
- **User Type** - The User Type categories to which the user is assigned.
- **Patron Group** - The Patron Group to which the user is assigned.



Typical User Report

- **ILL Permissions** – For Staff users assigned to the ILL Staff User Type, lists the *detailed* ILL Permissions granted to the user (see ***Modifying ILL Permissions*** on page **14** for more information).
- **AGCat Permissions** – For Staff users assigned to the CAT Staff User Type, lists the *detailed* Cataloging Permissions granted to the user (see ***Modifying AGCat Permissions*** on page **16** for more information).
- **Web HLD Permissions** – For Staff users assigned to the CAT Staff User Type, lists the *detailed* Web HLD Permissions granted to the user (see ***Modifying Web HLD Permissions*** on page **17** for more information).
- **Statistics Permissions** – For Staff users assigned to the Statistics User Type, lists the *detailed* Statistics Permissions granted to the user (see ***Modifying Statistics Permissions*** on page **21** for more information).

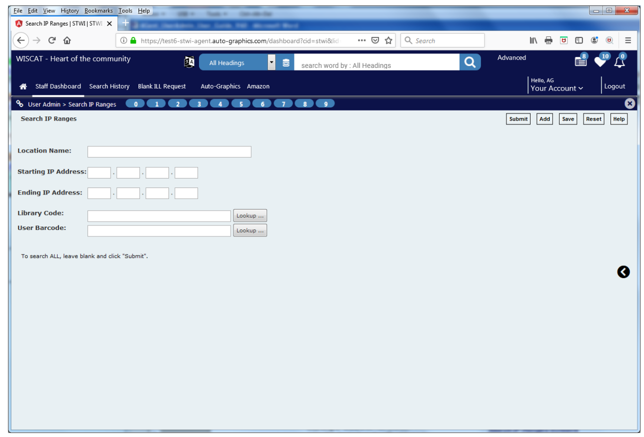
Searching IP Ranges

The **Search IP Ranges** function lets you generate a listing of *all libraries* that have configured a specified IP range as *valid* using the **Define Valid IP Ranges** function. You can search by location name, IP address range, library code, and/or user barcode. You can also define a *new* valid IP range (see ***Defining Valid IP Ranges*** on **43** for details).

*The **Search IP Ranges** function is available to Customer SuperUsers only.*

To search IP ranges:

1. From the **User Admin** menu, select **Search IP Ranges**.
   - The Search IP Ranges screen displays.



Search IP Ranges Screen

2. To limit your search by location name, enter the desired location name in the **Location Name** text box. You may enter a *complete* or *partial* **Location Name**.
3. To limit your search by IP address, enter the desired IP address (or address range) in the **Starting IP Address** and **Ending IP Address** text boxes.
   - To enter an *IP address range*, enter the desired *starting* IP address in the **Starting IP Address** text boxes; enter the desired *ending* IP address in the **Ending IP Address** text boxes.

   *The **Ending IP Address** must be greater than the **Starting IP Address**. You may use only the third and fourth bytes of the IP Addresses to specify an IP address range; e.g., 208.193.**118.1** to 208.193.**119.255**.*

   - To enter a *single IP address*, enter the desired address in the **Starting IP Address** text box.
4. To limit your search by library code, enter the desired library code in the **Library Code** text box. You must enter a *complete* library code. You may enter a *single* library code only.
   - If desired, you may use the **Lookup** feature to locate the code for the library for which you wish to search (see ***Using Library Code Lookup*** on **58** for details).
5. To limit your search by user barcode, enter the desired user barcode in the **User Barcode** text box. You must enter a *complete* user barcode. You may enter a *single* user barcode only.
   - If desired, you may use the **Lookup** feature to locate the barcode for the user for which you wish to search (see ***Using User Barcode Lookup*** on **58** for details).
6. To display a list of *all* currently defined valid IP ranges, leave *all* text boxes *blank*.
7. Click the **Submit** button.
   - The screen refreshes to display a list of *all* valid IP ranges that match your search criteria.

   If there are no matches to your search criteria, the message "No Libraries found" displays.

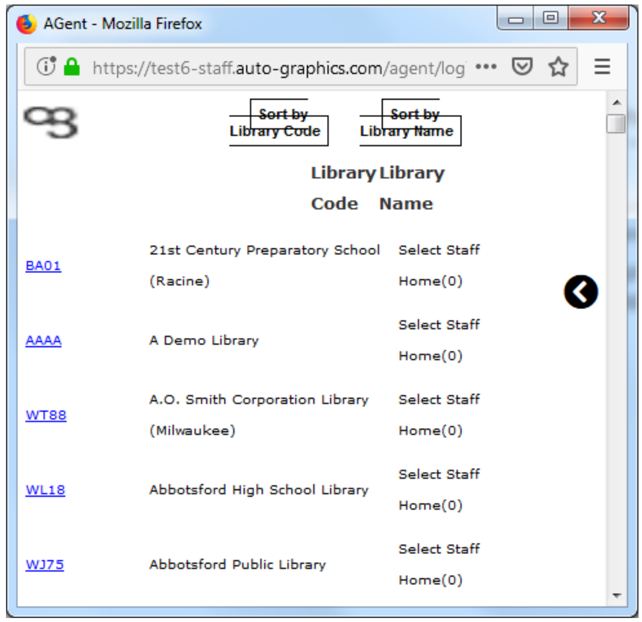
   - If desired, click the **Edit** link for an IP range to edit the current values for the IP range (see ***Defining Valid IP Ranges*** on **43** for details).
   - If desired, click the Delete link for an IP range to delete the IP range (see ***Defining Valid IP Ranges*** on **43** for details).
   - If desired, you can save a copy of your search results to a file on your local workstation (see ***Saving Search Results*** on **59** for details).

Using Library Code Lookup

If you are not sure of the **Library Code** for which you wish to search, you can use the library code **Lookup** feature to locate the desired library code.

To use Library Code Lookup:

1. Click the **Library Code - Lookup** button on Search IP Ranges screen.
    - The Library Code Lookup screen displays in an *additional* browser window. This list shows the **Library Code** and **Library Name** for *all* libraries in your consortium or collective.
    - Click the **Sort by Library Code** button to sort the list alphabetically by **Library Code**.
    - Click the **Sort by Library Name** button to sort the list alphabetically by **Library Name**.
2. Click the **Library Code** link for the library for which you wish to search.
    - The Library Code Lookup screen closes, and the selected library code is entered in the **Library Code** text box on the Search IP ranges screen *automatically*.



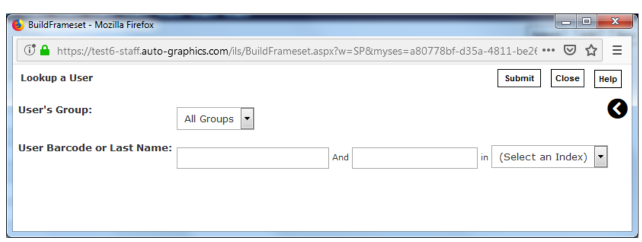
Library Code Lookup Screen

Using User Barcode Lookup

If you are not sure of the **User Barcode** for which you wish to search, you can use the user barcode **Lookup** feature to locate the desired user barcode.

To use User Barcode Lookup:

1. Click the **User Barcode - Lookup** button on Search IP Ranges screen.
    - The Lookup a User screen displays in an *additional* browser window.
2. Enter the desired search criteria:



Lookup a User Screen

- To limit the list to *only* those users associated with a specific user group, select the desired user group from the **User's Group** menu, then click the **Search** button.
    - Select **All Groups** to display users for *all* user groups.
    - Select the desired user group to display users for the associated group *only*.
- To locate a specific user by *barcode* or *name*, enter the user's barcode or last name in the **User Barcode or Last Name** text box. To view a list of *all* users associated with the currently specified **User's Group**, leave the **User Barcode or Last Name** text box *blank*.

When searching by a user's name, you may enter a complete *or* partial *last name.*

- To search *other fields* of the user records, enter the desired search term in the **And** text box, and select the desired search index (**City**, **Email Address**, etc.) from the **in** menu.

3. Click the **Submit** button to submit your search of the user database.

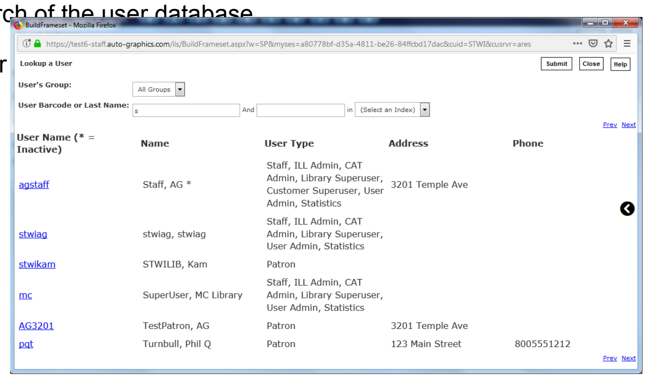
    - The screen refreshes to display the User *users* that match your search criteria.

    - Use the **Prev** and **Next** links to view other pages of the list.

   *The **Prev** and **Next** links are active* only *if your library's user database contains* more than 20 *users.*

4. Click the **User Name** link for the user barcode for which you wish to search.

    - The Lookup a User screen closes, and the selected **User Name** is entered in the **User Barcode** text box on the Search IP ranges screen *automatically.*



User Account List

Saving Search Results

You can save a copy of your search results to your local workstation.

To save Search IP Ranges search results:

1. On the Search IP Ranges screen, click the **Save** button.

    - A File Download dialog displays.

2. Select the "save" option on the File Download dialog.

    - A standard Save As dialog displays.

3. Use the standard procedures for your browser to save the file to your local workstation.

Adding a Valid IP Range

You can use the **Add** function from the Search IP Ranges screen to define a valid IP range for *any* library in your consortium or collective.

To add a valid IP range:

1. On the Search IP Ranges screen, click the **Add** button.

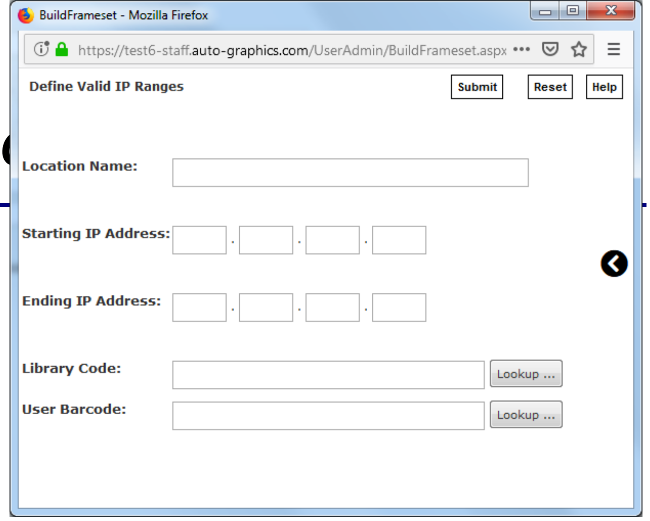
    - The Define Valid IP Ranges screen displays in an *additional* browser window.

2. Enter a name to identify the IP address range in the **Location Name** text box.

    - The **Location Name** may include both alphabetic and numeric characters. The **Location Name** may be a *maximum* of 50 characters in length, *including spaces*.

3. Enter the desired IP address (or address range) in the **Starting IP Address** and **Ending IP Address** text boxes.

    - To enter an *IP address range*, enter the desired *starting* IP address in the **Starting IP Address** text boxes; enter the desired *ending* IP address in the **Ending IP Address** text boxes.



*The **Ending IP Address** must be greater than the **Starting IP Address**. You may use only the third and fourth bytes of the IP Addresses to specify an IP address range; e.g., 208.193.**118.1** to 208.193.**119.255**.*

- To enter a *single IP address*, enter the desired address in the **Starting IP Address** text box.

4. Enter the library code with which the IP address range is associated in the **Library Code** text box. You may enter a *single* library code only.

   - If desired, you may use the **Lookup** feature to locate the desired library code (see ***Using Library Code Lookup*** on page **58** for details).

5. If you wish the IP range to be associated with a *specific* user, enter the user's barcode in the **User Barcode** text box. You may enter a *single* user barcode only.

   - If desired, you may use the **Lookup** feature to locate the desired user's barcode (see ***Using User Barcode Lookup*** on page **58** for details).

6. Click the **Submit** button to add the specified IP address(es) to the list of valid IP ranges for your library.

   - The Define Valid IP Ranges screen closes *automatically*, and the Search IP Ranges screen refreshes to display the added IP range.

   *If you an improperly formatted or invalid information, or if you omit mandatory information, an error dialog displays, identifying the error Click the **OK** button to close the message, and re-enter the information, as appropriate.*

7. Repeat steps **1** through **6** to add *additional* IP addresses.