Security

When you as an Administrator first start using Alexandria, and as you continue to add operators, or users, you will assign each operator a Security Group that dictates what they can and can not do.

Overview

Security options are found in Preferences under Configuration, the keyhole badge here.

Several Security Groups are already set up for you, and you can use them as they are or change them to fit your needs — with two exceptions.

The top group of security is that of District Administrator; a District Administrator has access to everything, and you need a group and operator with that option to make sure you won't ever get locked out of changing something critical. Also, only District Administrators can restore an archive. For these reasons, you cannot edit the District Administrator group.

The Patron group, the default Security Group assigned to your patrons, is not allowed any access to Alexandria. You can only change the Researcher tab for this group.

Library Administrator is like a District Administrator, but at the library level, and you can edit their permissions. Library Administrators only have full access to libraries assigned to them.

For each Security Group, except District Administrator and Patron, there are several tabs where you set access permissions: Management, Tools, Circulation, Preferences, Reporting, and Researcher.

Management gives control over things like Data Station Management, Patrons, Items, Routes, and Subscriptions.

Tools allow access to the Tools such as Inventory, Authority Control, Explore Builder, the Bulletin Board, and Review Management.

Circulation gives permissions to perform various Circulation activities, Preferences gives or restricts access to Preferences, Reporting for reports, and Researcher we'll cover in a minute.

Default Settings

At the current settings, the Library Administrator has full access to most all of these, with exceptions being (*Tools* >) Sites, (*Management* >) Data Station Management, and a Library Administrator can only edit Security Groups of Administrator and below.

Note these menus are hierarchical, so for example, Items, Import Export & Utilities will also allow everything in the menu before it.

A Librarian will have the ability to do most things, but has no access to Security and Z39.50 preferences, or SIF, and has limited access to Sites.

Library Staff can perform most Circulation, but cannot access System Preferences, and can't perform Imports and Exports on some Management modules or any Reports.

A Library Aide can't access reports at all, has no or limited access to Management modules, Preferences, and Tools, but can reasonably perform Circulation.

Student Aides can perform minimal Circulation, but while a Library Aide can Perform a Circulation Override— such as checking out more than the maximum number of items — a Student Aide cannot.

Self-Service… by default has nothing but Check In Only selected, so the person using the Self-Service mode only has the ability to check in items.

Patron and Patron Limited: When you create a Patron record, that patron will automatically be assigned the Patron Security Group. Again, patrons

with this Group have no access to the Alexandria program, you can only edit their permissions for the Researcher.

That covers whether or not they can manage their own holds and reservations, view and edit their own information, renew their items, if they can add reviews and if those reviews require approval or are automatically approved, and how the patron names appear on reviews.

Keep in mind that the Policy settings for a patron will override their Security settings.

You can use Patron Limited for a group of patrons who, for example, aren't allowed to write reviews.

Edit, Rename, Add, Remove

To edit a Security Group, select the group (like Library Staff), change a preference, and save.

You will notice under Preferences some of the options are grayed out; these are the System Preference options that the Library Staff has No Access to.
If you wish to allow them access to one of these preferences, you will have to allow access to System Preferences (*Edit*), and then to the particular preference.

To add a group, you can either duplicate a current group by selecting 'Duplicate' from the the Actions menu, or create an entirely new group with the add icon.

Name the group, and it will ask if you want all the security options to start On or Off. In most cases you'll choose All Off and hand-pick which options this group has access to.

Save the window.

To rename a group, select it and choose Rename from the Actions menu.

Create as many Security Groups as you will need, and if you wish to delete any of them, select the group, and click the remove icon at the bottom, and save your changes.

Applying the Security Group

To apply a security group to a user, open Patron Management, locate that patron record, and change the Security Group drop-down menu. To give the patron access to multiple Sites, in the bottom right, click on Site Access. Save the record, and you are finished.

That covers the Security Preferences.