The Staff Privileges function enables you to add new staff members, or users, to the ALEPH system and to assign them passwords and access rights. Information may be modified and permissions added or deleted. Passwords are always changed to uppercase.
Staff Permissions

Staff Privileges are accessed by right-clicking the gold key icon located in the lower right portion of the Circulation, Acquisitions, Cataloging or Interlibrary Loan modules. You must be logged on to ALEPH with a specially assigned user ID that is permitted to work with permissions.
Staff Permissions

After selecting Staff Privileges from the menu, the staff privileges window is displayed. Here you will see a list of all users associated with your library.
Staff Permissions

Unchecking the ‘Display only users with same user library as connected user’ box will provide a list of all users in the System but you are only permitted to add, update and delete users associated with your library.
Staff Permissions

The right portion of the staff privileges box offers several ways to work with permissions.
Staff Permissions

- **New User** – To add a new staff member to the list of users, click ‘New.’
- **Modify User** – To modify a user’s password or other information, highlight the user and click ‘Modify User.’
- **Duplicate User** – To add a new user by copying an existing user’s details, highlight the user and click ‘Duplicate User.’
- **Delete User** – To delete a user, highlight the user and click ‘Delete User.’ Take care to NOT delete the user account that has permissions to work with staff privileges (e.g., NDSCREATE)
- **Access Rights** – To view or modify a user’s privileges, highlight the user and click ‘Access Rights.’ Note: if a user has been assigned a proxy, access rights must be modified on the proxy user.
- **Summary** – To view a listing of all privileges in all libraries for a user, highlight the user and click ‘Summary.’
Staff Permissions

- Display Proxies – To display the list of usernames assigned to a specific proxy username, highlight the proxy username and click ‘Display Proxies.’
- Budgets – To assign budget permissions, highlight the user and click ‘Budgets.’
- Order Units – To assign order units, highlight the user and click ‘Order Units.’
New Users

To add a new user, click ‘New Users.’
New Users

A dialog box appears where we input the user’s information.
New Users

- **User** *(mandatory & no spaces)*: The user name is the unique name that identifies the user, and can be up to 10 alphanumeric characters.

- **Password** *(mandatory & no spaces)*: The user’s associated password is used to log on to each of the GUI modules, and can be up to 10 alphanumeric characters.

- **User Library** *(mandatory)*: Use the drop down menu to select the user’s associated library.

- **Cataloger Level**: Used only in Cataloging. When a catalog record is edited and saved on the server, the level of cataloger is assigned to the record. Staff may not edit records previously saved at a higher level than the level indicated in their user record.

- **Proxy Fields (optional)**: Proxy Fields include Function Proxy, Cataloger Proxy, Budget Proxy and Order Unit/Sublibraries Proxy. These fields can be used to assign the users the same privileges in the given area as another user in the ADM. The user will automatically receive the same privileges as the proxy, and cannot be assigned individual privileges.
New Users (con’t)

- **Cat OWN ID** (mandatory): Select the OWN ID code from the drop down menu. This code is automatically written in the OWN field of catalog records this user creates.

- **Cat OWN Permission** (mandatory): Select the OWN permission code from the drop down menu. This code determines which cataloging records the user is allowed to update based on the record OWN field.

- **Circ Override Level**: Used only in Circulation. In order to override a specific error message, a staff member must have a level equal to or higher than the level assigned to the error message.

- **ILL Unit**: Used only in ILL. Select the ILL Unit from the drop down menu.

- **Name**: (preferred) Enter the user’s name.

- **Department** (Optional): Enter the user’s department.

- **Note 1/2** (Optional): use as needed
New Users

- Email: Enter the user’s email address.
- Address (optional): Enter the user’s address.
- Telephone: Enter the user’s telephone number.
- Expiration Date (optional): Enter the date upon which the user’s password will expire. The user will be blocked from logging into ALEPH after this date.
- Last Alert Date (optional): This is the last date the user was altered concerning an upcoming block.
- Blocked/Blocked Reason (only when necessary): Check the box and enter a reason why a user has been blocked from logging into the system.
- ERM User/Password (optional): Used only for electronic resource management.
New Users

After user information has been added, click ‘OK’ to save.
New Users

The newly created user appears in the list of users.
Modify Users

To modify or change a user record, highlight the user ID and click ‘Modify User.’
Modify Users

You are presented with the user password information form where you are able to make changes. Click ‘OK’ to save.
Duplicate Users

To duplicate a user record, highlight the user ID and click ‘Duplicate User.’ It is important to note that you are not duplicating user information, but rather the permissions that are assigned to the user.
Duplicate Users

You are presented with the user password information form where you are able to enter user information. When you click ‘OK’ to save, the permissions will be added to user.
Deleting Users

To delete a user, highlight the user and click ‘Delete.’ You will be asked to confirm if you wish to delete the user record.
Access Rights

To grant a user permissions, highlight their user ID and click ‘Access Rights.’
Access Rights

A list of libraries is displayed in which you are able to grant privileges. Highlight the library for which you wish to assign permissions, and click ‘OK.’
Access Rights

The library you select is dependent upon which rights you wish to assign. Most privileges (especially in Circulation, Acquisitions, Serials) are assigned in the XXX50 library, Cataloging privileges in ODN01, and ILL privileges in XXX40. Some areas overlap – for example, some course reserve permissions are granted in XXX50, and others in XXX30. Additionally, when looking at work done in the Cataloging module, working with bibliographic records requires permissions in ODN01, holdings records in ODN60, and item records in XXX50. Interlibrary Loan requires permission in both XXX40 and ODN00.
Access Rights

A dialog listing all permissions is displayed, divided, by tabs, into seven functional sections.
Access Rights

Within each tab is a list of privileges specific to functionality in that area. Click on the ‘+’ to expand or ‘-’ to collapse the list.
Access Rights

To allow a particular privilege, highlight the entry and click ‘Allowed.’ To allow all the privileges in a given tab, click ‘Allow All.’ You will be prompted with a dialog box asking you to verify the action.
Access Rights

Green checks next to a function indicate permission has been granted.
Access Rights

To deny a particular privilege, highlight the entry and click ‘Denied.’ To deny all the privileges in a given tab, click ‘Deny All.’ You will be prompted with a dialog box asking you to verify the action.
Access Rights

Red ‘x’ s next to a function indicate permission has been denied.
Access Rights

If a permission is not allowed, the system assumes the user is denied the functionality, so it is not necessary to deny all privileges in the system a user is not permitted to do.
Access Rights

The deny feature is a handy tool when you wish to allow most of the functions in an area, but not all. Allow all sub-functions, and then select the few functions you wish to deny. In this example, the system understands the user has been allowed all Item Control functions except global changes.
Access Rights

To delete a particular privilege, highlight the entry and click 'Delete.' To delete all the privileges in a given tab, click 'Delete All.' You will be prompted with a dialog box asking you to verify the action.
Access Rights

To grant permission for an individual sublibrary, click the ‘Sublibraries’ button. This button is only active if the function is sublibrary sensitive. The vast majority of permissions granted in ODIN libraries are at the XXX50 level, and not the sublibrary level.
Access Rights

A dialog box is presented where you are able to allow or deny the permission by sublibrary. Highlight the sublibrary in the right pane, and choose the “X” or “checkmark” to deny or allow the function.
Access Rights

In section two of the Staff User’s Guide – Staff Privileges version ## document, Ex Libris has outlined each ALEPH user privilege in each of the seven tabs. **Note:** this document may not contain all privileges as Ex Libris does add more throughout a version’s life. The document may be found on the ODIN webpage in the section: Training/System Librarian/Exlibris:

http://www.odin.nodak.edu/training/systemslibrarian
Summary

A Summary of a user’s privileges in all libraries can be viewed by highlighting the user and clicking ‘Summary.’
Summary

Note the variety of libraries in the list.
Display Proxies

To display a list of accounts a user is proxied to, highlight the user and click ‘Display Proxies.’
Display Proxies

In the example below, the user BSFELLY is connected to BSFELLEN by proxy. This is a good tool to use prior to deleting user accounts. You can use ‘Display Proxies’ to be certain no other user is proxied to the account you wish to delete.
Budgets

When new budgets are created, the user must be given permission to view, allocate, encumber, or expend from them. To grant budget permissions to a user, highlight the user and click ‘Budgets.’

![Staff Privileges dialog box showing user permissions and budget selection options.](image)
Budgets

You are prompted to select the ADM code of the library. Click ‘OK.’
Budgets

In the Budget Permissions box, click ‘Add’ to add a new budget.
Budgets

In the Budget’s Transaction Permissions, enter the budget name in the budget code field, or use the ellipse button to retrieve a list of budgets. Indicate in the check boxes which permissions are allow, and click ‘OK.’

**TIP:** enter *-* in the Budget Code field to grant permission for all budgets, including those created in the future. That is a hyphen between the asterisks!
Budgets

The budgets that the user has rights to are now listed in the Budget Permissions box. You are able to change the permissions associated with a particular budget by clicking ‘Modify,’ or delete permissions for a particular budget by clicking ‘Delete.’
Services

Two services are available to assist in working with staff privileges. The services can be found in the Circulation, Cataloging and Acquisitions modules. On the menu bar in any of these modules, go to Services | Staff.
Services

The Staff Privileges Report (staff-01) produces a report of staff users and their privileges based on filters input in the workform.
Services

The Staff Users Report (staff-02) also produces a report of staff users and their privileges based on filters input in the workform.
Additional Documentation

Additional documentation, including this PowerPoint and Ex Libris Release Notes listing all new features involving Staff Privileges can be found on the ODIN webpage @

http://www.odin.nodak.edu/node/52