

User's Guide



Integrated Library System

Virtua Profiler

Global Settings

VIRTUA ILS – INTEGRATED LIBRARY SYSTEM

Virtua Profiler

Global Settings

Version 16.1

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1. Introduction

The Virtua Profiler lets you customize almost every aspect of the Virtua™ ILS – Integrated Library System. This user's guide provides details on configuring Global Settings, which are parameters that affect your entire system.

Note: From this point on, we will refer to the Virtua ILS – Integrated Library System as simply Virtua or the Virtua system in this guide.

This chapter covers the following topics:

- ⇒ [Using This Guide](#)
- ⇒ [Introduction to Global Settings](#)

1.1 Using This Guide

This user's guide contains step-by-step instructions for configuring the Global Settings for your system. This user's guide is intended for system administrators who have root access to the system.

- Throughout this user's guide, we assume that you are logged in to the Profiler as the Root User.
- If you are NOT logged in as the Root User, some features described in this user's guide may NOT be available to you.
- For details on the Root User profile, see the section “[About Default User Profiles](#)” in this user's guide.

Additionally, throughout this guide, we assume that you have read the *Virtua Profiler Getting Started Primer*, which provides an overview of the Virtua Profiler and its features as well as information on establishing a connection to an Oracle database.

In this user's guide, we describe the Global Settings in the order that they appear in the Virtua Profiler tree. The organization of this guide does NOT suggest a recommended workflow.

You can use the list below and the [Table of Contents](#) to locate specific information in this guide. For your easy reference, this guide also contains a [Table of Figures](#) and an [Index](#). In addition, each chapter in this guide begins with a list of topics that are included in the chapter, and each topic is hyperlinked to the appropriate section.

For:	See:
An introduction to Global Settings in the Virtua Profiler	Section 1.2
Details on setting the Currencies parameter	Chapter 2
Information about the Language Codes parameter	Chapter 3
Details on setting the LC Country Configuration parameter	Chapter 4
Details on setting the LDAP Options parameter	Chapter 5
Details on working with the Library Members parameter	Chapter 6
Details on choosing a sort criterion for location names in the Virtua client using the Location List Sorting parameter	Chapter 7
Details on working with the Location Names parameter (i.e., setting up library locations)	Chapter 8
Details on working with the Override User-Level Location parameter	Chapter 9
Details on working with the Password Management parameter	Chapter 10
Details on disabling user permissions for new Virtua features	Chapter 11
Details on working with the Postal Codes parameter	Chapter 12
Details on working with the Connection History parameter	Chapter 13
Details on working with the Status Displays parameter	Chapter 14
Details on working with the User List	Chapter 15
Details on working with User Profiles	Chapter 16

Details on the changes that were made to update this user's guide from the last version.

[Appendix B](#)

Note: Throughout the *Virtua Profiler/Global Settings User's Guide*, we assume that you are familiar with your Windows® operating system.

1.2 Introduction to Global Settings

Configuring your system involves working with an intricate web of interdependent data. It is important, therefore, that you set up information in a specific order. Configuring the Global Settings is your starting point.

The Global Settings tab (*Figure 1-1*) of the Virtua Profiler contains most of the global parameters and permissions that the Virtua subsystems require for operation.

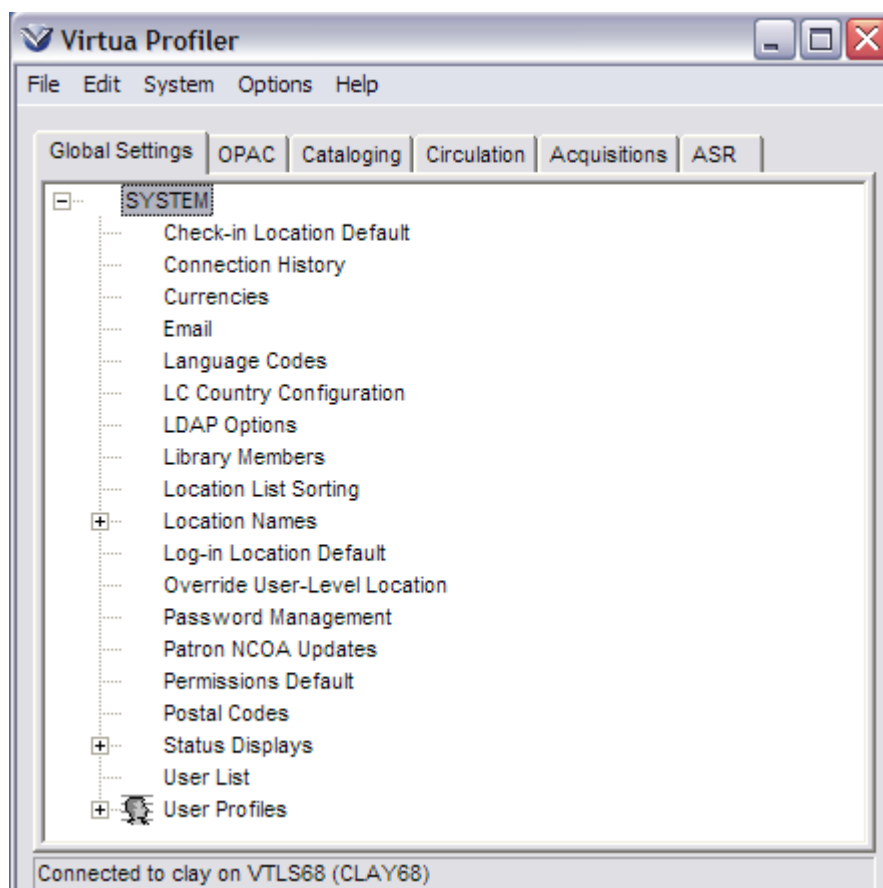


Figure 1-1. Global Settings Tab

Global Settings consist of . . .

- Check-in Location Default
- Currencies
- E-mail
- Language Codes
- LC Country Configuration
- LDAP Options
- Library Members
- Location List Sorting
- Location Names
- Log-in Location Default
- Override User-Level Location
- Password Management
- Patron NCOA Updates
- Permissions Default
- Postal Codes
- Connection History
- Status Displays
- User List
- User Profiles

Important: Because the Global Settings tab provides access to information about users and locations, only a few administrative (Root) users should have permission to access it. Therefore, throughout this user's guide, we assume that you are logged in to the Profiler as the Root User.

2. Working with the Check-in Location Default Parameter

The Check-in Location Default parameter lets you change the default behavior of Virtua with regard to the addition of new locations (see the chapter “[Setting up Locations](#)”). By default, when you add a new location in the Location Names parameter, Virtua automatically selects that location in the Check-in Locations list box on the Main Location window for *every* location that you have previously set up. This feature is provided so that you do not have to select each check-in location manually. If your library wants to turn off this default behavior, the Check-in Location Default parameter gives you the option to do so.

To tell Virtua that you do NOT want new locations to be automatically selected as check-in locations for all previously established locations, select the check box on the Check-in Location Default window ([Figure 2-1](#)).

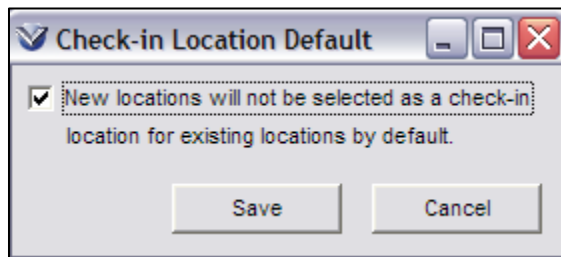


Figure 2-1. Check-in Location Default Parameter

3. Working with the Currencies Parameter

The Currencies parameter lets you view all the currencies and their ISO-4217 codes that are available in Virtua. The parameter specifies the Home Currency and gives you the ability to manage currency use, mainly in the Acquisitions subsystem. Using the Currencies parameter, you can . . .

- View and modify the conversion factor of each currency (except the Home Currency).
- View and modify the name of each currency.
- View and modify eight display elements of each currency.
- Update encumbrances against purchase orders and invoices to reflect current currency conversion rates.
- Schedule automatic updates of currency conversion rates.
- Configure an alternate set of currency conversion factors to be used in conjunction with lost or damaged item processing.

This chapter covers the following topics:

- ⇒ [About the Home Currency](#)
- ⇒ [Configuring Arbitrary Currencies](#)
- ⇒ [Automatic Updates to Currency Exchange Rates](#)
- ⇒ [Viewing Errors Associated with Automatic Updates](#)
- ⇒ [Re-encumbering Accounts After Currency Updates](#)
- ⇒ [Configuring Alternate Conversion Factors](#)

3.1 About the Home Currency

As part of Virtua's installation, a number of scripts are run to set up a permanent "Home" Currency. Virtua uses the Home Currency to display currencies throughout all of the Virtua subsystems and to perform transactions in the Acquisitions subsystem. As shown in the Currencies parameter, the Home Currency's Conversion Factor is always **1** (one).

Important: After you use the Acquisitions subsystem, you must NOT change the Home Currency. If you do, you will corrupt the acquisitions data in your database.

If you use another currency in addition to the Home Currency, in the Currencies parameter you need to . . .

- Set the currency's Conversion Factor relative to the Home Currency's value.
-AND-
- Modify the display formats for the currency as appropriate.

The Home Currency, for example Canada Dollars, is easy to distinguish in the Currencies window (*Figure 3-1*). Its Code and Conversion Factor are highlighted in red. In the Currencies parameter, you can modify any of the Home Currency's fields (see the next section for details) except the Code and Conversion Factor.

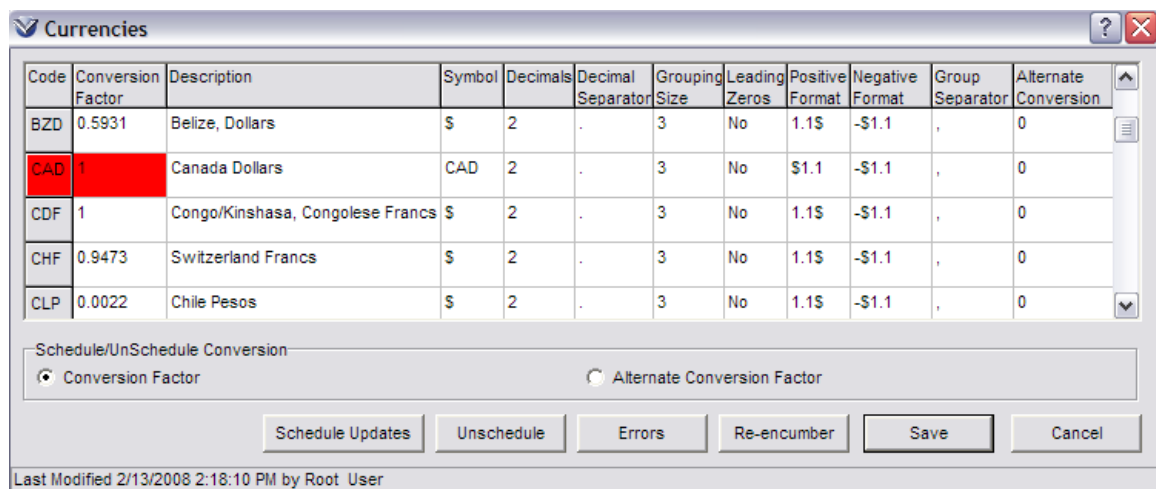


Figure 3-1. Currencies Window (Displaying the Home Currency Highlighted in Red)

3.2 Configuring Arbitrary Currencies

After you have set the Home Currency, you are ready to configure non-home, or arbitrary, currencies. Arbitrary currencies are calculated relative to your Home Currency. In addition to calculating conversion factors, you will be configuring the way the currency values display in your system.

To configure arbitrary currencies,

1. On the Global Settings tab, double-click Currencies.

The Currencies window appears (*Figure 3-2*).

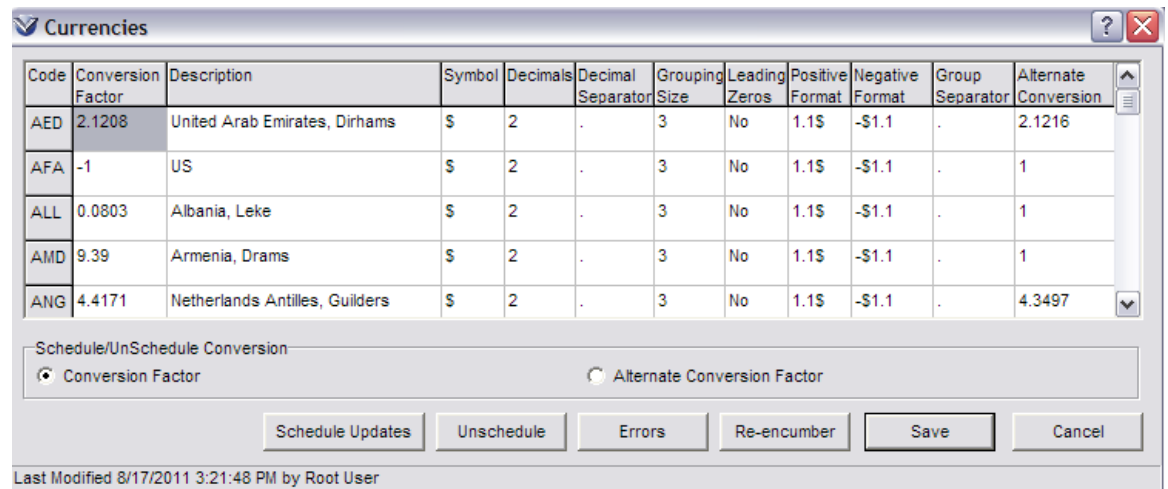


Figure 3-2. Currencies Window

The display table on the Currencies window contains a system-defined list of currencies, sorted in alphabetical order by their ISO-4217 standard codes, which appear in the read-only Code column. The other columns in the table are editable and contain currency-specific information, which you can modify as needed.

2. Scroll down in the table until you find the currency that you want to configure.
3. In the Conversion Factor column, type a number that relates the value of the currency to that of the Home Currency. The Conversion Factor is the number by which you must multiply a currency value to determine its equivalent value in the Home Currency. For example . . .
 - If the Home Currency is USD, and 1.00 USD = 1.94 AUD, then the conversion factor for AUD is 0.52.
 - If the Home Currency is AUD and 1.00 AUD = 0.52 USD, then the conversion factor for USD is 1.94.

Note: The Home Currency's Conversion Factor is always **1** (one) and highlighted in red.

4. In the Description column, modify the default name of the currency as needed.
5. In the Symbol column, modify the default currency symbol as needed.

Note: Commas (,) and periods (.) are not allowed as part of the currency symbol.

6. In the Decimals column, type the number of places to the right of the decimal in the currency display.

Hint: The Decimals column accepts only whole numbers. For example, the number 2 (two) indicates *two* decimal places.

7. In the Decimal Separator column, type the punctuation separating whole currency amounts and fractional units.

Note: The Decimal Separator punctuation mark must be different from the Group Separator punctuation mark.

8. In the Grouping Size column, type the number of digits allowed to the *left* of the decimal before being split by a Group Separator, which is defined in the last column of the table.
9. In the Leading Zeros column, specify whether a zero will precede the decimal when amounts in this currency are less than one. Choose either . . .
 - **Yes** - Leading zeros will appear.
 - **No** - Leading zeros will not appear.
10. In the Positive Format column, specify the format that will be used for any currency amount greater than zero.
11. In the Negative Format column, specify the format that will be used for any currency amount less than zero.
12. In the Group Separator column, specify the character that will be used to divide an amount into groups of appropriate size.

Note: The Group Separator punctuation mark must be different from the Decimal Separator punctuation mark.

13. If you wish to configure an alternate currency conversion factor, type a number in the Alternate Conversion column. Virtua uses the alternate currency conversion factor *exclusively* to calculate the replacement cost of lost or damaged items and billed items that are long overdue. See the section “[Configuring Alternate Conversion Factors](#)” for more information.

Warning: When configuring currencies, do NOT leave any of the following fields blank: Description, Symbol, Decimal Separator, and Group Separator. Currently, this causes a server error.

14. If desired, locate another currency in the table, and repeat steps 5-13 in this procedure to modify its settings as needed.
15. When you have finished configuring all the desired currencies, click the Save button.
 - If you did not change any Conversion Factors, your changes are saved directly to the database.
 - If you changed the Conversion Factor for any currency, the following message appears ([Figure 3-3](#)).

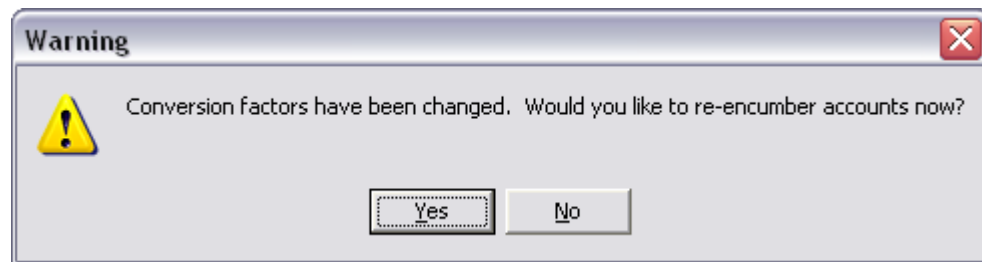


Figure 3-3. “Would You Like to Re-encumber” Message

- ◆ If you click the Yes button, Virtua re-encumbers your Acquisitions accounts for orders and invoices and saves your changes to the database.
- ◆ If you click the No button, Virtua saves your changes to the database but does not re-encumber your Acquisitions data.

Note: If your Acquisitions data is not re-encumbered to reflect changes in the currency conversion factors, you will not be able to save purchase orders or invoices to the database.

3.3 Automatic Updates to Currency Exchange Rates

Your library needs the latest currency exchange rate information to perform acquisitions activities and maintain up-to-date accounting data. Virtua provides a scheduler tool that lets you schedule automatic updates of currency conversion rates. Virtua can use one of two methods to update currency conversion rates automatically:

- Download new rates from *WebserviceX.NET*.
- Access a **.csv** (comma-separated value) file on the database server that contains exchange rates and read in the rates specified there.

A program called **JobScheduler.exe**, which runs in the background, triggers the actual download or reads in the values in the **.csv** file according to the schedule that is specified in the currency update Scheduler.

Upon downloading or accessing the new rates, Virtua updates the currency conversion rates in your system. In addition to performing updates, Virtua automatically re-encumbers your accounts based on the changes to the rates.

Note: After purchase orders and invoices are re-encumbered, the Virtua client connections will need to be restarted for your re-encumbrances to take effect. Keep this in mind when you schedule automatic currency conversion rate updates. We recommend that you schedule the automatic updates during off hours when client connections are shut down. For details about running **JobScheduler.exe**, see the *System Management: Acquisitions User's Guide*.

3.3.1 Setting Up a Currency Exchange Rate .csv File

For Virtua to use a **.csv** file to update currency exchange rates, you will need to create and maintain the file and store it on the server where the database is located.

To create a .csv file that contains currency exchange rates,

1. For each currency to be updated, create a line in the file that contains only the three-letter currency code and the currency exchange rate. For example:

GBP,11.2013
USD,7.8011
Etc.

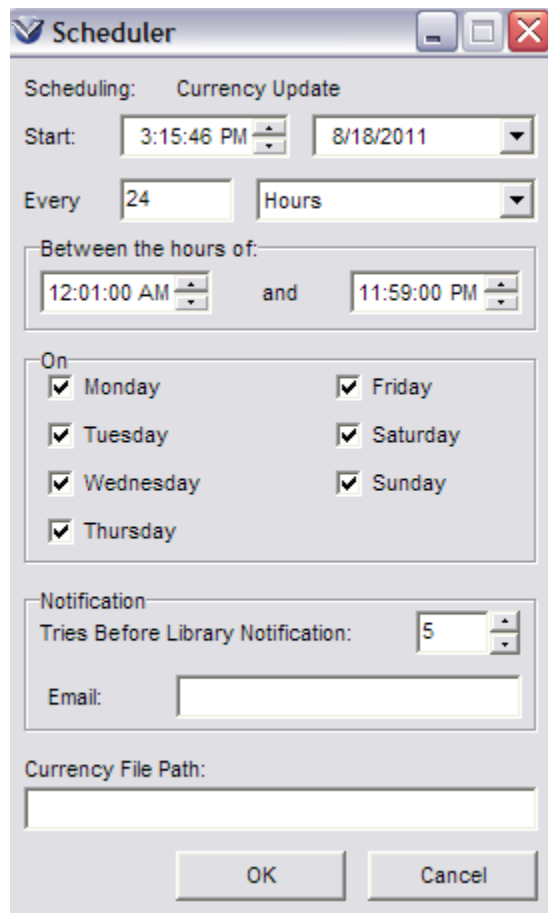
2. Save the file on the server where the database is located.

3.3.2 Scheduling Automatic Currency Updates

To schedule automatic updates to your currency conversion rates,

1. Display the Currencies window ([Figure 3-2](#)).
2. Make sure that the Conversion Factor radio button is selected (see also the section “[Configuring Alternate Conversion Factors](#)”).
3. Click the Schedule Updates button.

The Scheduler window appears ([Figure 3-4](#)).



The image shows a Windows-style dialog box titled "Scheduler". It contains the following fields and controls:

- Scheduling:** Currency Update
- Start:** 3:15:46 PM (time spinner) and 8/18/2011 (date dropdown)
- Every:** 24 (text box) and Hours (dropdown)
- Between the hours of:** 12:01:00 AM (time spinner) and 11:59:00 PM (time spinner), separated by the word "and".
- On:** A group box containing seven days of the week, each with a checked checkbox: Monday, Tuesday, Wednesday, Thursday, Friday, Saturday, and Sunday.
- Notification:** Tries Before Library Notification: 5 (spin box) and Email: (empty text box).
- Currency File Path:** (empty text box).
- Buttons:** OK and Cancel at the bottom.

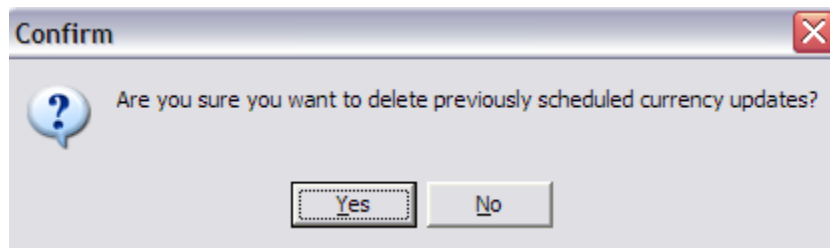
Figure 3-4. Scheduler Window

4. Set the various elements on the Scheduler window. Each group box lets you define specific scheduling information:
 - Start time and start date for downloads/updates.
 - Frequency of the downloads/updates (requires you to type a number and then choose a period)
 - Hours between which downloads/updates are to take place.
 - Days on which downloads/updates are to take place.
 - Tries Before Library Notification: The number of unsuccessful scheduled download/update attempts the system will make before sending a generic notification regarding the problem.
 - E-mail address of the person to be notified.
 - Currency File Path: (*Populate this field only if you want Virtua to update conversion factors per rates defined in a .csv file rather than per downloads from the Web.*) The path on the database server where the .csv file is located.
5. Click the OK button.

To delete the schedule for automatic updates to currency conversion rates,

1. On the Currencies window, click the Unschedule button.

The software will ask for a confirmation of the deletion:



2. Click Yes. The download schedule for automatic currency updates will be deleted.

3.4 Viewing Errors Associated with Automatic Updates

Any errors that may occur during a scheduled automatic update of currency rates will be logged for your review.

To view errors associated with automatic currency updates,

1. On the Currencies window, click the Errors button.

The Currency Update Errors window appears ([Figure 3-5](#)).

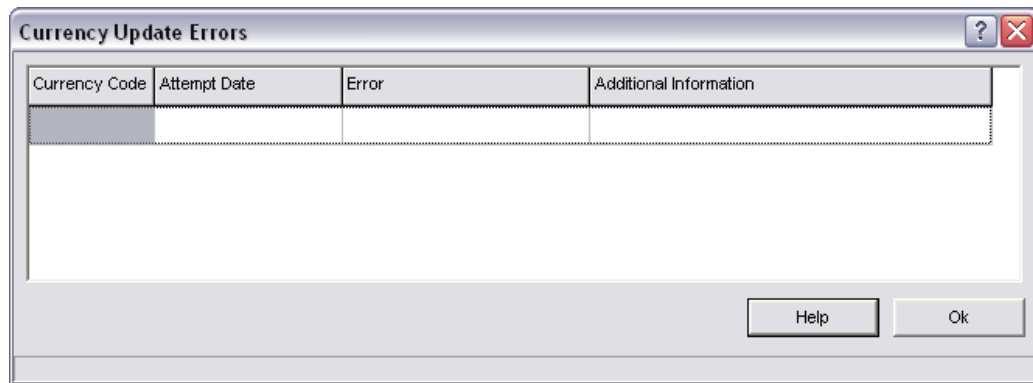


Figure 3-5. Currency Update Errors

The Currency Update Errors window displays the following information about each error that has occurred:

Currency Code – The code of the currency associated with the error.

Attempt Date - The date the update was attempted.

Error - A brief description of the error.

Additional Information – Other information about the error.

2. After viewing the errors, click the OK button.

3.5 Re-encumbering Accounts after Currency Updates

Whenever the conversion factors of non-Home currencies are modified, you will need to update your Acquisitions data to reflect the new exchange rates. If you do not update your Acquisitions data, the system will not let you save any purchase orders or invoices to the database.

The Currencies parameter offers two easy ways to re-encumber orders and invoices after currency conversion factors have been modified:

- Automatic re-encumbrance via the Scheduler (see the previous section “[Scheduling Automatic Currency Updates](#)”).
- Manual re-encumbrance via the Re-encumber button

To re-encumber your Acquisitions data manually,

1. Display the Currencies window ([Figure 3-2](#)).
2. Click the Re-encumber button.

The following message appears ([Figure 3-6](#)), indicating that you must save your currency settings before re-encumbering.

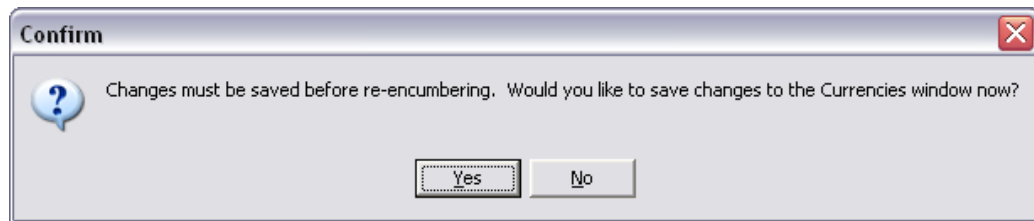


Figure 3-6. Re-encumber Warning

3. Click the Yes button.

Virtua updates all encumbrances against purchase orders and invoices so that they reflect the new exchange rates, based on any changes made to the conversion factors. Virtua then closes the Currencies window.

Note: The Re-encumber button does NOT update account expenditures, as they are fixed values.

3.6 Configuring Alternate Conversion Factors

Using the Alternate Conversion column on the Currencies window ([Figure 3-7](#)), you can configure an alternate set of currency conversion factors for Virtua to use exclusively to calculate the replacement cost of lost or damaged items and billed items that are long overdue. For all other scenarios that use currencies, Virtua will use the value in the Conversion Factor column.

Note: You can configure the alternate conversion factors in the same way as the conversion factors (see the section “[Configuring Arbitrary Currencies](#)”).

The screenshot shows the 'Currencies' window with a table of currency conversion factors. The table has columns for Code, Conversion Factor, Description, Symbol, Decimals, Decimal Separator, Grouping Size, Leading Zeros, Positive Format, Negative Format, Group Separator, and Alternate Conversion. Below the table is a 'Schedule/Unschedule Conversion' section with two radio buttons: 'Conversion Factor' (selected) and 'Alternate Conversion Factor'. At the bottom are buttons for 'Schedule Updates', 'Unschedule', 'Errors', 'Re-encumber', 'Save', and 'Cancel'. The status bar at the bottom indicates 'Last Modified 11/22/2010 11:07:05 AM by Root User'.

Code	Conversion Factor	Description	Symbol	Decimals	Decimal Separator	Grouping Size	Leading Zeros	Positive Format	Negative Format	Group Separator	Alternate Conversion
AED	0.2723	United Arab Emirates, Dirhams	\$	2	.	3	No	1.1\$	-\$1.1	.	0.2723
AFA	1	Afghanistan, Afghanis	\$	2	.	3	No	1.1\$	-\$1.1	,	0.123
ALL	0.01	Albania, Leke	\$	2	.	3	No	1.1\$	-\$1.1	,	0.01
AMD	9.39	Armenia, Drams	\$	2	.	3	No	1.1\$	-\$1.1	,	0
ANG	0.5581	Netherlands Antilles, Guilders	\$	2	.	3	No	1.1\$	-\$1.1	,	0.5581

Schedule/Unschedule Conversion

☒ Conversion Factor ☐ Alternate Conversion Factor

Schedule Updates Unschedule Errors Re-encumber Save Cancel

Last Modified 11/22/2010 11:07:05 AM by Root User

Figure 3-7. Currencies Parameter

Beneath the Currencies table is the Schedule/Unschedule Conversion area, which contains two radio buttons. The Conversion Factor radio button and Alternate Conversion Factor radio button work in conjunction with the Schedule Updates button and Unschedule button as follows:

- If the Conversion Factor radio button is selected, clicking the Schedule Updates button or the Unschedule button will let you schedule or unschedule updates to the exchange rates in the Conversion Factor column.
- If the Alternate Conversion Factor button is selected, clicking the Schedule Updates button or the Unschedule button will let you schedule or unschedule updates to the exchange rates in the Alternate Conversion column.

4. Working with the E-mail Configuration Parameter

The E-mail Configuration parameter ([Figure 4-1](#)) lets you choose whether e-mails sent via the Virtua client are sent through the default e-mail client software on the workstation (which is the default behavior) or through the Virtua server software.

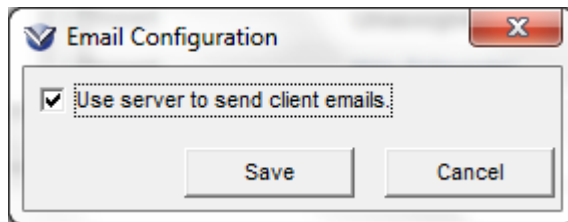


Figure 4-1. E-mail Configuration Window

Note that sending e-mails via the server may eliminate some issues that e-mail clients have with sending UTF-8 data.

Note: In the Virtua client, the E-mail Reply To Address setting on the Cataloging Options window allows you to configure an e-mail address to use as the From address for e-mails sent from the Virtua client.

5. Working with Language Codes

This section explains how to configure the Language Codes parameter. The language codes that you configure here are used to populate the Language keyword search filter in the Virtua client.

Note: For details on using keyword search filters, see the *OPAC Workflow-Based Reference Guide*.

Via the Language Codes parameter, you can . . .

- Add new language codes and associated descriptions.
- Edit existing language codes and descriptions.
- Delete language codes and their associated descriptions.

5.1 Adding a New Language Code

To add a new language code to the list,

1. On the Language Codes window ([Figure 5-1](#)), click the Add button.

A new row appears at the bottom of the list.

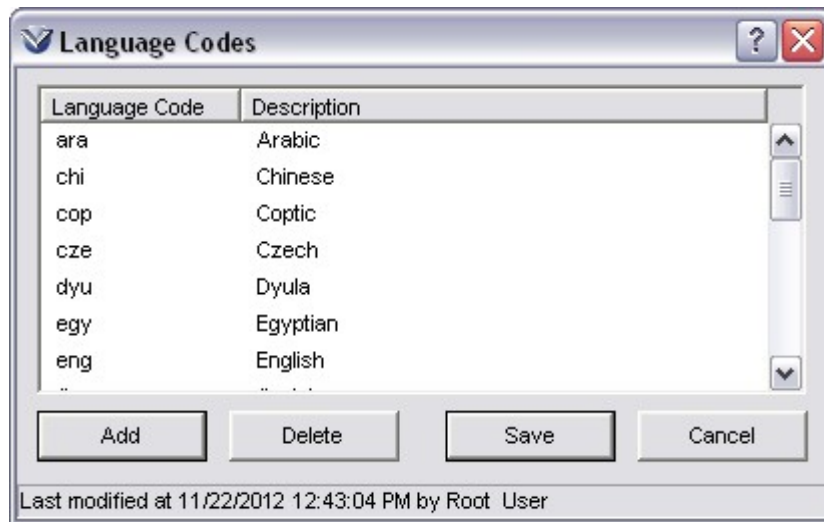


Figure 5-1. Language Codes Window

2. In the Language Code column, type the language code you want to add.

Note: Each code must be unique.

3. In the Description column, type the description that corresponds with the new language code.
4. Click the Save button.

The new language code is saved to the database.

5.2 Deleting a Language Code

To delete a language code from the list,

1. On the Language Codes window, highlight the language code you want to delete.
2. Click the Delete button.

The language code is deleted from the database.

5.3 Editing Language Codes

To edit an existing language code,

1. On the Language Codes window, highlight the language code that you want to edit.
2. Click the value in the Language Code column to edit it.
3. Click the value in the Description column to edit it.
4. Click the Save button.

Your changes are saved to the database.

6. Working with the LC Country Configuration Parameter

This section explains how to configure the LC Country Configuration parameter. The country names that you configure in this parameter are used to populate the Place of Publication keyword search filter in the Virtua client.

Note: For details on using keyword search filters, see the *OPAC Workflow-Based Reference Guide*.

Via the LC Country Configuration parameter, you can . . .

- Add new LC country codes and associated country names.
- Edit existing LC country codes and country names.
- Delete LC country codes and their associated country names.

6.1 Adding a New LC Country Code

To add a new language code to the list,

1. On the LC Country Codes window ([Figure 6-1](#)), click the Add button.

A new row appears at the bottom of the list.

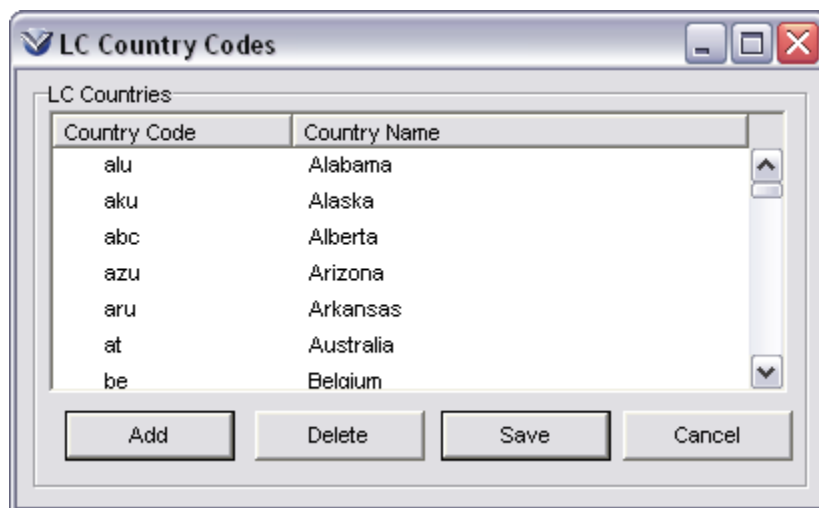


Figure 6-1. LC Country Codes Window

-
2. In the Country Code column, type the country code you want to add.

Note: The country code must be unique, and a maximum of four characters in length.

-
-
3. In the Country Name column, type the country name that corresponds with the new country code.
4. Click the Save button.

The new country code is saved to the database.

6.2 Deleting an LC Country Code

To delete an LC country code from the list,

1. On the LC Country Codes window, highlight the country code you want to delete.
2. Click the Delete button.

The country code is deleted from the database.

6.3 Editing LC Country Codes

To edit an existing LC country code,

1. On the LC Country Codes window, highlight the country code that you want to edit.
2. Click the value in the Country Code column to edit it.
3. Click the value in the Country Name column to edit it.
4. Click the Save button.

Your changes are saved to the database.

7. Authenticating Staff Users using an LDAP Server

Lightweight Directory Access Protocol (LDAP) is an Internet protocol that allows you to store data in a directory and access it later via an LDAP server. You can use LDAP to help manage staff user authentication in Virtua.

With LDAP authentication enabled for a particular user, the password that the user enters at log-in is authenticated against information on an LDAP server rather than against the Password field in the Virtua user profile.

To enable LDAP authentication for a particular user, you must . . .

- Indicate that the user is to be authenticated using LDAP by selecting the LDAP radio button on the Add/Modify User window of the user profile. For details, see the section “[Configuring the Authentication / Authorization Tab](#)” in this guide.
- Configure the LDAP Options parameter (*Figure 7-2*) with information for your LDAP server.
- (Optional) Define an LDAP Group for the user.

This chapter covers the following topics:

- ⇒ [Introduction to LDAP](#)
- ⇒ [Setting the LDAP Server URL](#)
- ⇒ [Setting the Base Distinguished Name](#)
- ⇒ [Setting the User Attribute](#)
- ⇒ [Specifying an LDAP Group](#)

7.1 Introduction to LDAP

If you do not have a good understanding of LDAP, it will be useful for you to understand the LDAP directory structure and understand LDAP terms before configuring the LDAP Options parameter.

An LDAP directory stores data (such as Virtua user information) in a hierarchical tree structure. Each level of the tree structure is represented by a specific code, known as

an LDAP attribute. Each occurrence of an attribute is associated with a name that describes the particular branch or entry in the directory tree structure.

Figure 7-1 shows a sample tree structure for a Virtua library with three locations, each location having multiple Virtua users.

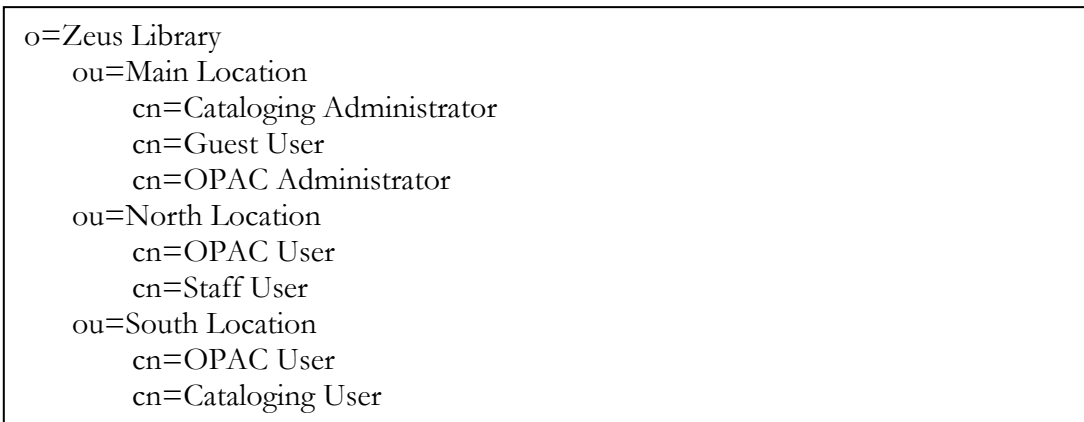


Figure 7-1. Sample LDAP Directory Structure

LDAP directories can be configured in several different ways. In this example, the hierarchical levels of the directory are represented by the attributes **o**, **ou**, and **cn**:

- **o** - Represents the highest level of the directory (in this case, a library with several branches).
- **ou** - Represents the second level of the directory (in this case, the three locations of the Zeus Library).
- **cn** - Represents the lowest level of the directory, the individual Virtua user. In the LDAP directory, the name associated with the **cn** must match the Virtua username used at log-in.

Note: Not all LDAP directories use the attributes **o**, **ou**, and **cn**. Your LDAP directory may use different attributes, such as **dc** or **uid**. When setting the LDAP Options parameter, you must enter values that are appropriate for your LDAP directory.

When working with the LDAP Options parameter, you will need to be familiar with the following LDAP terms:

- **Distinguished name (DN)** - A string that represents a single entry (i.e., a user) and identifies its place in the LDAP directory tree. In the sample tree structure above, the DN for the Guest User is *cn=Guest User,ou=Main Location,o=Zeus Library*. The DN is always written starting with the lowest level of the directory

hierarchy, and ending with the highest level. Note that the name of one directory level and the LDAP attribute of the next level are separated by a comma, but no spaces.

- **Base distinguished name (base DN)** - A string that represents the portion of the DN that all Virtua users have in common. In the example above, the base DN is *o=Zeus Library*, since all entries in the LDAP directory are found under this branch of the tree structure. However, if all the Virtua users in the sample LDAP directory were found under the Zeus Library, Main Location branch of the tree structure, then the base DN would be *ou=Main Location,o=Zeus Library*.
- **User attribute** - The attribute in an LDAP directory that represents the lowest level of the tree structure, the individual Virtua user. In the example above, the user attribute is **cn**.
- **LDAP group** - A term used in Virtua to describe a particular set of Virtua users in an LDAP tree. In the example above, the Guest User belongs to the *ou=Main Location* group. Depending on the structure of your LDAP directory, you may need to specify an LDAP group in the user profile. For details, see the section [“Specifying an LDAP Group”](#) in this chapter.

To perform LDAP user authentication, Virtua must first determine the full DN for the user. Virtua constructs the full DN by linking together the user attribute, the LDAP group(s), and the base DN, in this order. The following sections describe the LDAP Options parameters that make it possible for Virtua to construct a DN and communicate it to the LDAP server.

7.2 Setting the LDAP Server URL

On the LDAP Options window ([Figure 7-2](#)), the LDAP Server URL text box lets you specify the LDAP server to which Virtua will connect during user authentication.

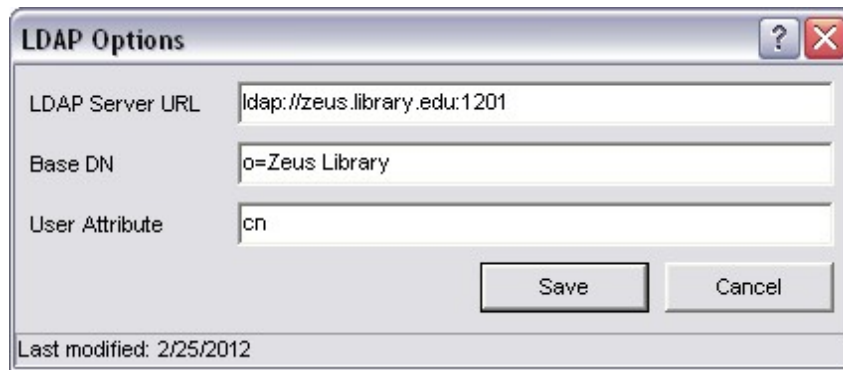


Figure 7-2. LDAP Options Window

The LDAP server URL consists of the following components:

- **Protocol identifier** - Specifies the type of connection Virtua will make with the LDAP server. You can enter a protocol identifier of *ldap://* for a normal connection or *ldaps://* for a Secure Socket Layer (SSL) connection.
- **Host name or IP address** - Identifies the host name or IP address of the server, for example, *zeus.library.edu* or *100.45.54.101*.
- **Port number** - Specifies the port number used for the connection. The port number is optional; if you do not enter a port number, a standard port number will be used. The standard port number for normal connections is 389, and the standard port number for SSL connections is 636.

For example, in [Figure 7-2](#) the specified LDAP server URL is *ldap://zeus.library.edu:1201*. In this case, the protocol identifier is *ldap://*, indicating a normal (non-SSL) connection to the LDAP server. The hostname is *zeus.library.edu*, and the specified port number is *1201*.

To set up the LDAP Server URL,

1. In the LDAP Server URL text box, type the appropriate protocol identifier (*ldap://* for a normal connection, *ldaps://* for an SSL connection).
2. Directly following the protocol identifier, type the host name or IP address of the LDAP server.
3. If you want to specify a port number, type a colon (:) after the host name or IP address, and then enter the desired port number.

7.3 Setting the Base Distinguished Name (Base DN)

On the LDAP Options window ([Figure 7-2](#)), the Base DN text box allows you to specify the base distinguished name that Virtua will use to build the full distinguished name.

Note: For details on distinguished names and base distinguished names, see the section “[Introduction to LDAP](#)” in this chapter.

To set the Base DN,

- In the Base DN text box ([Figure 7-2](#)), type the base DN that is appropriate for your LDAP directory.

Hints:

- The base DN must be entered in the format `[attribute]=[name]` (e.g., `o=Zeus Library`).
- If the base DN consists of more than one level of the LDAP directory tree, use the `[attribute]=[name],[attribute]=[name]` format (e.g., `ou=Main Location,o=Zeus Library`).

7.4 Setting the User Attribute

On the LDAP Options window ([Figure 7-2](#)), the User Attribute text box allows you to specify the code that represents the user attribute in the LDAP directory.

Note: For a description of LDAP user attributes, see the section “[Introduction to LDAP](#)” in this chapter.

To set the User Attribute,

- In the User Attribute text box ([Figure 7-2](#)), type the code for the LDAP attribute that represents the lowest level in your LDAP directory tree.

7.5 Specifying an LDAP Group

The LDAP Group text box, located on the User Information tab of the Add New User window (Figure 7-3), is part of the user profile. It is necessary to enter an LDAP Group only if one is needed to complete the LDAP distinguished name.

The screenshot shows the 'Add New User' window with the 'Authentication / Authorization' tab selected. The 'Authentication Method' section has the 'LDAP' radio button selected and highlighted with a red rectangle. Next to it is a 'Group' text box. Other options in this section include 'Password' (unselected), 'User can change password' (unchecked), 'Set expiration time' (unchecked), 'Password expires immediately' (unchecked), 'Days between expirations' (90), and 'Days until next expiration' (90). Below this, there are 'Valid from' and 'Valid to' date pickers (6/20/2012 and 6/20/2013 respectively), an 'Account Locked' checkbox (unchecked), and an 'Acquisitions super user' checkbox (unchecked). The 'Authorized Modules' section has 'External Z39.50' checked, 'iPortal' unchecked, 'Unrestricted' (radio button), and 'Server' (radio button). The 'Counters / Limits' section has input fields for 'Interactions', 'iPortal Downloads', 'Z39.50 Downloads', and 'Max. Simultaneous Sessions'. At the bottom are 'Templates', 'Print', 'Save', and 'Cancel' buttons. A status bar at the very bottom says 'USER NOT SET!'.

Figure 7-3. LDAP Group Text Box on Add New User Window

See the section “[Configuring the Authentication / Authorization Tab](#)” for more details on configuring this tab.

This section explains how to determine whether you need to enter an LDAP Group for LDAP-authenticated users.

Example 1: When an LDAP Group is Needed

While the **Base DN** and the **User Attribute**—the highest and lowest levels of the LDAP directory tree, respectively—apply to every entry in the LDAP directory, the LDAP Group represents the portion of the full DN that is NOT accounted for by the base DN or the user attribute, and usually applies only to a subset of users, or even a single user.

In the sample LDAP directory tree in [Figure 7-4](#), consider the Guest User.

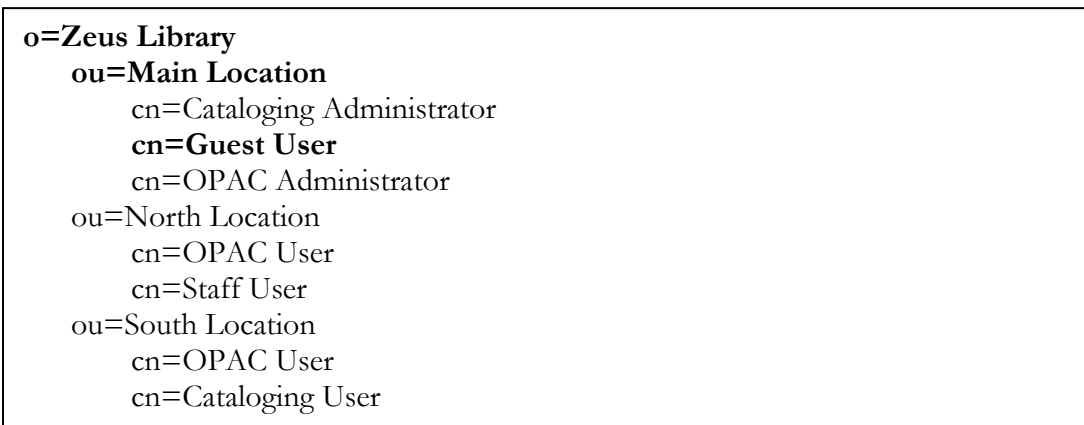


Figure 7-4. Sample LDAP Directory Structure

On the LDAP Options window ([Figure 7-5](#)) . . .

- The User Attribute is *cn=Guest User*.
- AND-
- The Base DN is *o=Zeus Library*.

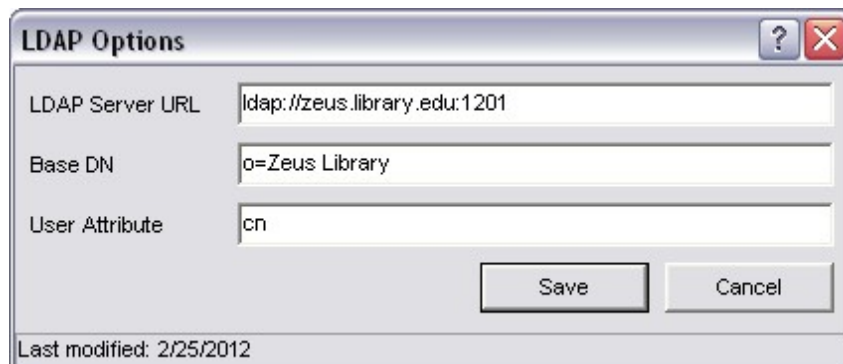


Figure 7-5. LDAP Options Window

Using the directory structure in Figure 7-4, the LDAP Group for this user would be set to *ou=Main Location*. This provides Virtua with the missing LDAP directory path that is necessary to construct a complete DN for the user.

Example 2: When an LDAP Group is Not Needed

Depending on the structure of your LDAP directory, you may not need to specify an LDAP group in the user profile. Consider the sample LDAP directory tree in [Figure 7-6](#):



Figure 7-6. Sample LDAP Directory Structure

Because there is only one location within the Smithfield Library, the complete DN for each user can be formed from the User Attribute (*cn=[user name]*) and the Base DN (*ou=Main Location,o=Smithfield Library*). There is no need to specify an LDAP Group for the Guest User, OPAC User, or Staff User; the information in the LDAP Options window is sufficient ([Figure 7-7](#)).

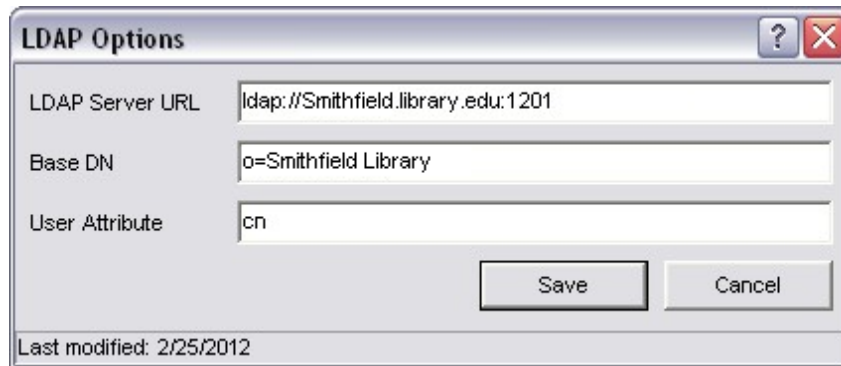


Figure 7-7. LDAP Options Window

8. Working with the Library Members Parameter

In a union catalog environment, it is important to know which member libraries own a copy of a bibliographic record. Via the Library Members parameter, union catalogs can define a name and symbol for each member library and specify the bibliographic tag into which the symbol should be inserted. By inserting a library symbol into a bibliographic record, you indicate that a given member library owns a copy of a particular record.

Note that Virtua prevents you from deleting a bibliographic record if it contains a library symbol. For details on inserting library symbols into bibliographic records, see the *Basic Cataloging Workflow-Based Reference Guide*.

To set up the Library Members parameter,

1. On the Library Members window ([Figure 8-1](#)), click the Add button to add a new library member to the list.

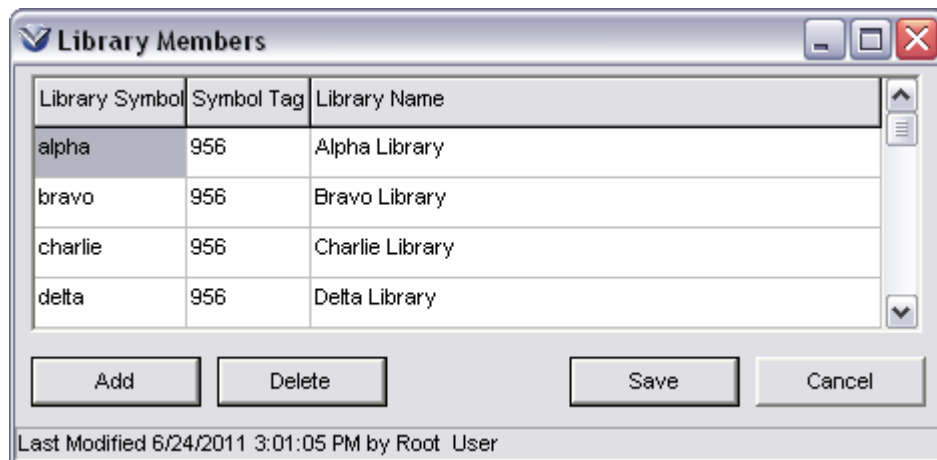


Figure 8-1. Library Members Window

2. A new row appears in the table.

3. In the new row, define the . . .
 - **Library Symbol** - A unique, alphanumeric symbol used to identify the library. By inserting this symbol into a bibliographic record, you can link the record to a library member. The Library Symbol can be up to 12 characters in length.
 - **Symbol Tag** - The bibliographic tag into which the library symbol is inserted.
 - **Library Name** - The name of the member library.
4. If needed, click the Add button to add another row.
5. To delete a row, place your cursor anywhere in that row, and then click the Delete button.
6. When you are finished entering all the information, click the Save button.

The new library member is saved to the database, and the Library Members window closes.

9. Choosing the Sort Order of Location Lists

The Location List Sorting parameter lets you define the sort order of location names in drop-down list boxes in the Virtua client. By default, the Virtua client presents location names in the numeric order of the locations' location codes. However, the Location List Sorting parameter lets you choose to instead sort location names in the Virtua client alphabetically by location name.



Figure 9-1. Location List Sorting Window

If the Location List Sorting parameter is set to . . .

- **Code** - Location names in drop-down list boxes in the Virtua client will be sorted by the locations' numeric location code. This is Virtua's default behavior.
- **Name** - Location names in drop-down list boxes in the Virtua client will be sorted alphabetically by location name.

To determine the sort order for location names in the Virtua client:

1. Select the Code radio button to sort location names in the client using the location code.
-OR-
Select the Name radio button to sort location names alphabetically by location name.
2. Click the Save button.

The Virtua client will display location names in drop-down list boxes using the sort order you choose. Note that if you already have a client open, you will need to restart the client to view any changes in the Location List Sorting parameter.

10. Setting Up Locations

The Location Names parameter lets you define library locations and represent the physical and/or virtual locations of library materials. Locations are used throughout Virtua and are critical to the proper functioning of the system, especially in the Circulation subsystem. Library locations and their codes reside in the Location Names parameter, which is located on the Global Settings tab of the Virtua Profiler. Using the Location Names parameter, you can set up both main locations and sublocations.

Note: A new database may contain some locations by default. Do NOT delete these default locations before you add locations of your own. Rather, delete the default locations *after* you have set up all the locations for your library and *before* you begin using the Virtua client. Default locations cannot be deleted after they have been used (i.e., associated with a record).

The Location Names parameter also contains various settings that are specific to a particular location. At log-in, the Virtua client initializes the library location and establishes the appropriate circulation rules for this user/location combination. This chapter provides details for defining library location settings.

Important: The accuracy of Location Names and codes is paramount. Because they are linked to *each* patron type and item class in your system, they play a critical role in Circulation parameters. *Before you set up any other parameters, be sure that the library names and codes are accurate.*

This chapter covers the following topics:

- ⇒ [Introduction to Locations](#)
- ⇒ [Aspects of the Location Names Parameter](#)
- ⇒ [Adding, Modifying, and Deleting Locations](#)
- ⇒ [Configuring Settings for Library Locations](#)

10.1 Introduction to Locations

Virtua uses two types of locations:

- **Main Location** - Represents a primary organizational unit.
- **Sublocation** - Represents a secondary organizational unit within a main location.

Often, a main location represents a building, and its sublocations represent designated areas within that building. For example, if you set up each branch library as a main location, you can set up each branch library's reference section, media department, and children's section as sublocations within that branch.

The Location Names parameter uses a tree structure to organize main locations and sublocations. When you first expand the Location Names parameter, only main locations appear. For example, [Figure 10-1](#) displays five main locations: Arlington Library, Garcia Research Library, Harris Medical Library, Memorial Archives, and Wilson Library.

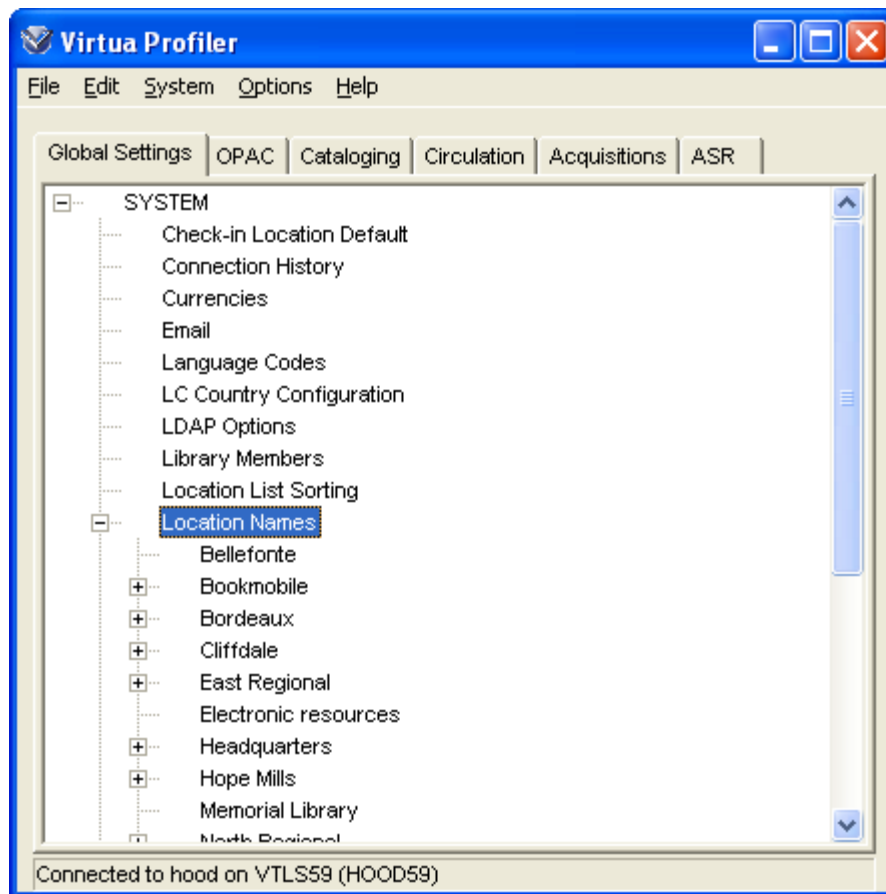


Figure 10-1. Location Names Parameter Displaying Main Locations

Hint: To determine whether locations in the tree are sorted by name or location code, use the Sort Locations By option on the Options menu. In the client, locations are always sorted by location code.

A plus sign (+) appears to the left of a main location if it has sublocations. When you expand a main location, the tree displays the sublocations belonging to that main location. For example, [Figure 10-2](#) displays the sublocations that belong to the Garcia Research Library.

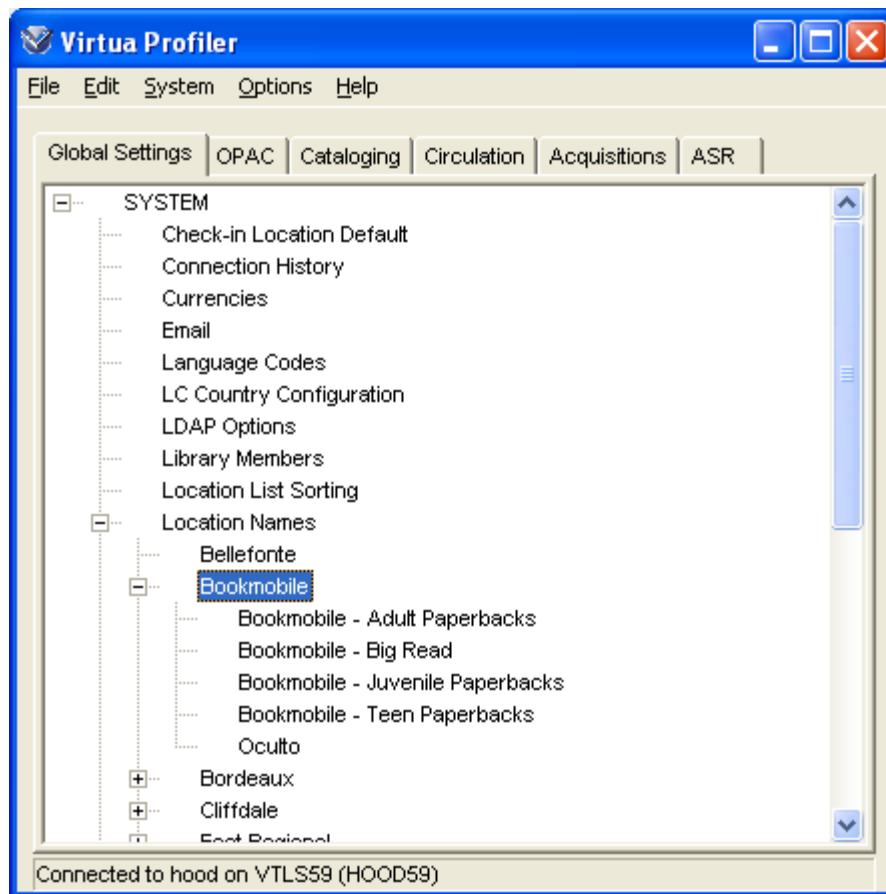


Figure 10-2. Location Names Parameter Displaying Sublocations

You can double-click either a main location or a sublocation to modify the associated settings. For example, if you double-click the Garcia Research Library heading, the Modify Main Location window appears (*Figure 10-3*).

Modify Main Location

General | Inherited Values | ASR

Location Name:

Main Location Code:

Sublocation Code:

Location Code:

Calendar:

Next Receipt Number:

vWorkstation Prefix:

☐ Paging Location

☐ Hide Holdings/Items

☐ Item Booking Pickup Location

☒ Pickup Location

☐ Select a request group for this pickup location:

Additional Location Information

Abbreviated Name:

Alternate Name:

Phone Number:

Mailing Address:

Email Address:

Figure 10-3. Modify Main Location Window

10.2 Aspects of the Location Names Parameter

When you access the Location Names parameter to add or modify a main location or sublocation, the Add New Main Location, Add New Sublocation, Modify Main Location (*Figure 10-3*), or Modify Sublocation window will appear as appropriate. Because these windows are very similar, for the sake of simplicity, this guide refers to these windows collectively as the Add/Modify Location window.

The Location Names parameter offers two tabs that allow you to define settings for main locations only, settings for sublocations only, and settings inherited by sublocations from main locations:

- **General Tab:** Depending on whether you adding/modifying a main location or a sublocation, this tab allows you to define values specific to the main location or the sublocation.
- **Inherited Values Tab:** When you are adding/modifying a main location, this tab allows you to define values that an associated sublocation will inherit. When you are adding/modifying a sublocation, this tab displays inherited values and is read only.

The Add/Modify Location window displays two buttons:

- **Save** - Saves your changes to the database and closes the Add/Modify Location window.

Note: When you add a new location, the Save button becomes enabled only after you specify a location name. For details, see the section “[Setting the Location Name](#)” in this chapter.

- **Cancel** - Cancels any changes and closes the Add/Modify Location window.

10.3 Adding, Modifying, and Deleting Locations

Via the Location Names parameter, you can . . .

- Add new locations.

- Modify the settings for existing locations.
- Delete locations.

This section describes how to add, modify, and delete library locations. For details on setting specific values for each location, see the section “[Configuring Settings for Library Locations](#)” in this chapter.

10.3.1 Adding Locations

The Location Names parameter lets you add either a main location or a sublocation to the system.

10.3.1.1 Adding a Main Location

To add a main location,

1. On the Global Settings tab, highlight Location Names.
2. Right click and then choose Add.

The Add New Main Location window appears (*Figure 10-4*).

Add New Main Location

General | Inherited Values | ASR

Location Name:

Main Location Code:

Sublocation Code:

Location Code:

Calendar:

Next Receipt Number:

☐ Item Booking Pickup Location

☐ Pickup Location

☐ Select a request group for this pickup location:

Workstation Prefix:

☒ Paging Location

☐ Hide Holdings/Items

Item Data

Additional Location Information

Abbreviated Name:

Alternate Name:

Phone Number:

Mailing Address:

Email Address:

Save Cancel

Figure 10-4. Add New Main Location Window – General Tab

3. On the General tab ([Figure 10-4](#)), set the desired values for the main location. For details, see the section “[Configuring Settings for Library Locations](#)” in this chapter.
4. On the Inherited Values tab ([Figure 10-5](#)), set the desired values for the main location. These values will be inherited by any sublocation you add.

Add New Main Location

General **Inherited Values** ASR

☐ Unfiltered Location

☐ Process Denied Loans

Default Item Class: Faculty Audio-Visuals (lc 9)

Default Loan Period (in days): 0

☐ Use Item Record Loan Period

Default Status: None

Default Copy Number: 0

Default PAC Code: None

Default Item Barcode Type: Regular

Reserve Settings

Default Reserve Item Class: Non Library Owned (I.C. 980)

Default Reserve Location: AGRICULTURE & APPLIED ARTS

Default Reserve Start Date: 10/ 8/2014

Default Reserve End Date: 10/ 9/2014

Reserve Pull Period Days: 0

☐ Allow Floating Items
Min item count threshold:

☐ Accept Floating Items
Max item count threshold:

Receipt Header:

Check-in Settings

Check-in Flag 3M: Not Allowed

Check-in Status: None

☒ Use Check-in Date
10/ 8/2014
12:00:00 AM

Check-in Locations

Brenham Campus Library
Bryan Campus Library
Customer Support Library
Guest/portal
Marshall Campus
Schulenburg Campus Library
Sealy Campus

Amnesty Flag: Fines will be assessed

☐ Create Received Items

Item Status: None

Save Cancel

Figure 10-5. Add New Main Location Window - Inherited Values Tab

- Click the Save button.

A confirmation message appears ([Figure 10-6](#)), indicating that the location has been added successfully.

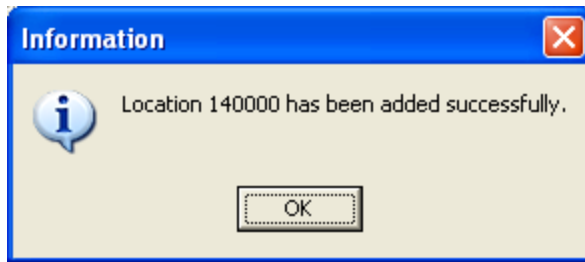


Figure 10-6. Add Location Confirmation Message

10.3.1.2 Adding a Sublocation

To add a sublocation,

1. On the Global Settings tab, double-click Location Names.
2. Highlight the main location under which you want to add a new sublocation.
3. Right click and choose Add.

The Add New Sublocation window appears ([Figure 10-7](#)), displaying the name of the main library location in the title bar.

The screenshot shows a Windows-style dialog box titled "Add New Sublocation for Bryan Campus Library". It has three tabs: "General", "Inherited Values", and "ASR". The "General" tab is active. The form contains the following fields and controls:

- Location Name:** A text input field.
- Main Location Code:** A text input field containing the value "2".
- Sublocation Code:** A text input field containing the value "88".
- Location Code:** A text input field containing the value "20088".
- Calendar:** A dropdown menu with "None" selected.
- Next Receipt Number:** A text input field.
- Workstation Prefix:** A text input field.
- Paging Location:** A checked checkbox.
- Hide Holdings/Items:** An unchecked checkbox.
- Item Booking Pickup Location:** An unchecked checkbox.
- Pickup Location:** An unchecked checkbox.
- Select a request group for this pickup location:** A dropdown menu.
- Additional Location Information:** A section containing:
 - Abbreviated Name:** A text input field.
 - Alternate Name:** A text input field.
 - Phone Number:** A text input field.
 - Mailing Address:** A large text area.
 - Email Address:** A text input field.
- Item Data:** A button.
- Save:** A button at the bottom right.
- Cancel:** A button at the bottom right.

Figure 10-7. Add New Sublocation Window – General Tab

4. On the General tab, set the desired values for the sublocation. For details, see the section [“Configuring Settings for Library Locations”](#) in this chapter.
5. Note that the elements on the Inherited Values tab (Figure 10-8) are grayed out and cannot be edited. These values are inherited from the main location settings.

The screenshot shows a software window titled "Add New Sublocation for Bryan Campus Library". It has three tabs: "General", "Inherited Values" (which is selected), and "ASR".

Values Inherited from the Main Location:

- ☐ Unfiltered Location
- ☐ Process Denied Loans
- Default Item Class: Item Class 0000: (28 /14 day)
- Default Loan Period (in days): 28
- ☐ Use Item Record Loan Period
- Default Status: None
- Default Copy Number: 0
- Default PAC Code: None
- Default Item Barcode Type: Regular

Reserve Settings:

- Default Reserve Item Class: Reserve (I.C. 990) 2 hr
- Default Reserve Location: BRYAN LIBRARY RESERVE
- Default Reserve Start Date: 6/ 1/2003
- Default Reserve End Date: 5/15/2004
- Reserve Pull Period Days: 10

Check-in Settings:

- Check-in Flag 3M: Not Allowed
- Check-in Status: None
- ☐ Use Check-in Date:
 - 12/ 6/2001
 - 12:00:00 AM

Check-in Locations:

- Brenham Campus Library
- Bryan Campus Library
- Customer Support Library
- Guest/portal
- Marshall Campus
- Schulenburg Campus Library
- Sealy Campus

Amnesty Flag: Fines will be assessed

☒ Create Received Items

Item Status: In Cataloging

Allow Floating Items:

- ☐ Allow Floating Items: Min item count threshold
- ☐ Accept Floating Items: Max item count threshold

Receipt Header:

Bryan Campus Receipt Header Profiler

Buttons: Save, Cancel

Figure 10-8. Add New Sublocation Window - Inherited Values Tab

- Click the Save button.

A confirmation message appears (*Figure 10-6*) indicating that the new location has been added successfully.

10.3.2 *Modifying Locations*

To modify a main location or a sublocation,

1. On the Global Settings tab, expand the tree structure until you find the name of the main location or sublocation that you want to modify.
2. Double-click the location name.

The Modify Main Location ([Figure 10-3](#)) or Modify Sublocation window ([Figure 10-9](#)) appears as appropriate, depending on the location that you selected.

Modify Sublocation

General | Inherited Values | ASR

Location Name: Bordeaux - Adult Paperbacks

Main Location Code: 3

Sublocation Code: 3

Location Code: 30003

Calendar: Default

Next Receipt Number:

Workstation Prefix:

☐ Paging Location

☐ Hide Holdings/Items

☐ Item Booking Pickup Location

☐ Pickup Location

☐ Select a request group for this pickup location:

Item Data

Additional Location Information

Abbreviated Name:

Alternate Name:

Phone Number:

Mailing Address:

Email Address:

Save Cancel

Figure 10-9. Modify Sublocation Window

3. Modify the settings as desired. For details, see the section “[Configuring Settings for Library Locations](#)” in this chapter.

Note:

- For main locations, you can modify any setting on the General tab (except the main location code, sublocation code, and location code) and any setting on the Inherited Values tab.
- For sublocations, you can modify any setting on the General tab except the main location code, sublocation code, and location code. You cannot, however, edit the settings that appear on the Inherited Values tab. These values are inherited from the main location.

4. Click the Save button.

Your changes are saved to the database.

10.3.3 Deleting Locations

Via the Virtua Profiler, you can delete most locations, with the following exceptions:

- You cannot delete a main location if one or more sublocations are associated with it. When you highlight a location that has one or more sublocations, the Delete menu item is disabled.
- You cannot delete a main location if it is the last main location defined for the database. When you highlight the only existing main location, the Delete menu item is disabled.

Hint: To delete the only main location defined for the database, create a new location, and then delete the desired location.

- You cannot delete a location if it is associated with any record in the database. Attempting to do so generates the following error message (*Figure 10-10*):

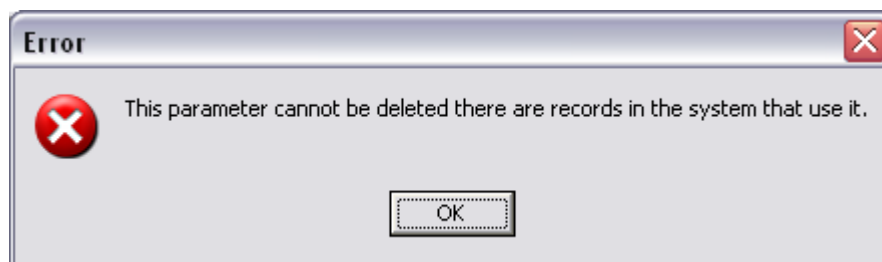


Figure 10-10. Location in Use Error Message

Any location that does not meet these exceptions can be deleted using the instructions provided below.

To delete a location,

1. On the Global Setting tab, expand the tree structure until you find the location that you want to delete.
2. Highlight the location name; click the right mouse button; and then choose Delete

The software prompts you with a confirmation message ([Figure 10-11](#)).

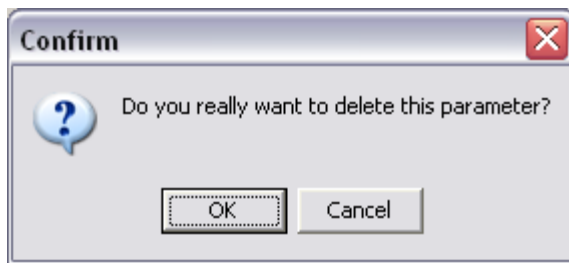


Figure 10-11. Delete Location Confirmation Message 1

3. Click OK.

A confirmation message appears, indicating that the location has been deleted successfully.

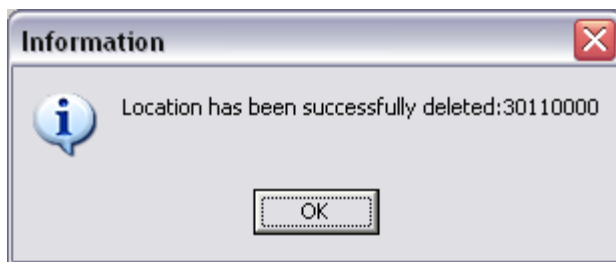


Figure 10-12. Delete Location Confirmation Message 2

10.4 Configuring Settings for Library Locations

The following sections offer guidelines for configuring the settings that appear in the Location Names parameter.

10.4.1 Add/Modify Location Window - General Tab

On the General tab, you can set values for both main locations and sublocations.

10.4.1.1 Setting the Location Name

You can specify the location name in the Location Name text box. The location name is alphanumeric and can be up to 500 characters in length.

Each location name must be unique. If you specify a location name that is already in use, when you try to save the location, Virtua returns the following error message (*Figure 10-13*).



Figure 10-13. Error Message for Duplicate Location Name

When you add a new location, the Save button is disabled until you type a location name in the Location Name text box. You can modify the location name of an existing location, as long as the new name is unique.

10.4.1.2 Setting the Workstation Prefix

The Workstation Prefix setting works in conjunction with the [Override User-Level Location](#) parameter to let you specify how Virtua determines the log-in location each time a user logs in to the Virtua client.

Note: Virtua does not use the Workstation Prefix value unless the Override User-Level Location parameter is enabled. For details on setting this parameter, see the section “[Working with the Override User-Level Location Parameter](#)” in this user’s guide.

If the Override User-Level Location parameter is . . .

- **Disabled** - Virtua sets the log-in location to the location specified in the user profile. The Workstation Prefix value is not used by Virtua.
- **Enabled** - Virtua checks the Computer Name of the workstation where the user is logging in and compares it to the Workstation Prefix values configured for each location.
 - ◆ If the Computer Name of the workstation matches the Workstation Prefix value of any location, then Virtua sets the log-in location to that location.
 - ◆ If the Computer Name of the workstation does NOT match a configured Workstation Prefix, Virtua sets the log-in location to the location specified in the user profile.

Note: You can determine the Computer Name of your Windows® operating system workstation by accessing the System Properties window, available from the Control Panel. The name of your computer will be listed as the “Full computer name.”

The Workstation Prefix is alphanumeric, case insensitive, and can be up to 15 characters in length. When the Profiler compares a Workstation Prefix with a Computer Name, it will use the “best” match.

Each Workstation Prefix must be unique. If you specify a Workstation Prefix that is already in use, when you try to save the location, Virtua returns the following error message ([Figure 10-14](#)).

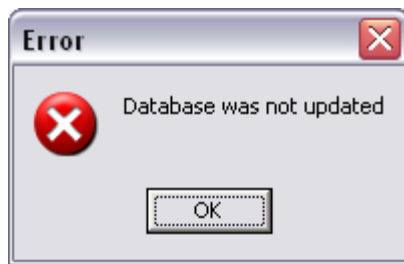


Figure 10-14. Error Message for Duplicate Workstation Prefix

Note that the Workstation Prefix match must occur with the beginning of the Computer Name, for the length of the prefix configured. For example, [Figure 10-3](#) shows that the main location Garcia Research Library has a Workstation Prefix of “ABC” configured. In this situation, if the Override User-Level Location parameter is enabled, any workstation with a Computer Name that starts with “ABC” will have its log-in location set to Garcia Research Library when the user logs in to the Virtua client.

10.4.1.3 Setting the Location Code Values

The Add/Modify Location window displays three fields related to the library location code:

- Main Location Code text box (editable *only* on the Add Main Location window)
- Sublocation Code text box (editable *only* on the Add Sublocation window)
- Location Code field (*read only*)

Virtua uses the values that appear in the Main Location Code text box and the Sublocation Code text box to determine the library location code, which appears in the Location Code field ([Figure 10-15](#)).

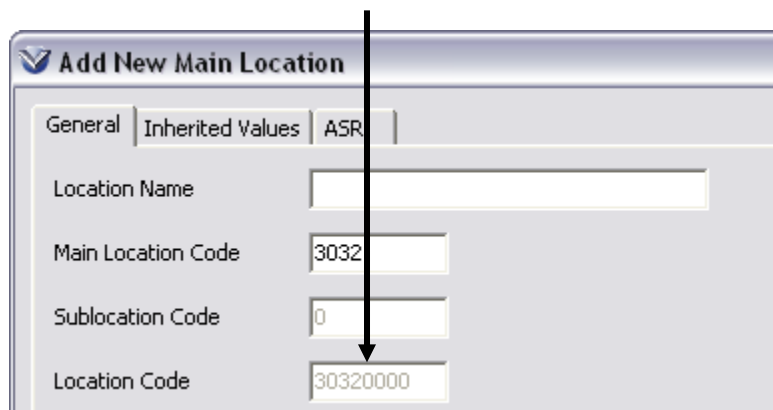


Figure 10-15. Add New Main Location Window - Location Code Field

When you add a new location, Virtua generates the value in the Location Code field automatically by combining the codes specified in the Main Location Code and Sublocation Code fields. You cannot modify the value in the Location Code field.

- On the Add *Main* Location window, you can type a value in the Main Location Code field. A main location *always* has a sublocation code of zero, so on the Add Main Location window, the Sublocation Code field is grayed out.

Note: Zero is NOT a valid value for the Main Location Code. If you attempt to save a location with a Main Location Code value of 0, Virtua returns an error message.

- On the Add *Sublocation* window, you can type a value in the Sublocation Code field. A sublocation inherits its main location codes from its main location, so on the Add Sublocation window, the Main Location Code field is grayed out.

10.4.1.3.1 How Virtua Determines the Location Code

The location code can appear in the Location Code field as any number from five to nine digits in length, but Virtua always stores the code as nine digits. This is described below.

Note: In the following description, the letter *M* represents one digit of the main location code, and the letter *S* represents one digit of the sublocation code.

- The value in the Main Location Code text box can be between one and five digits in length (i.e., M to MMMMM), and the value in the Sublocation Code text box can be between one and four digits in length (i.e., S to SSSS).

Note: Zero is NOT a valid value for the Main Location Code.

- Virtua combines the main location code and the sublocation code to produce the nine-digit location code (e.g., MMMMMSSSS).
- The main location code always holds five places in the location code. While the main location can *appear* as one to five digits in length, Virtua always *stores* the main location code with five digits. So . . .

In the Main Location Code text box, if you type...	Virtua displays the code in the Location Code field as...	And stores the code as...
M	M	0000M
MM	MM	000MM
MMM	MMM	00MMM
MMMM	MMMM	0MMMM
MMMMM	MMMMM	MMMMM

- The sublocation code *always* holds four places in the location code. In the Sublocation Code text box, if you type *fewer* than four digits, Virtua pads the code with zeros to make it four digits in length. The sublocation code is both stored AND displayed with all padded zeros. So . . .

In the Sublocation Code text box, if you type...	Virtua displays the code in the Location Code field as...	And stores the code as...
S	000S	000S
SS	00SS	00SS
SSS	0SSS	0SSS
SSSS	SSSS	SSSS

Note: The sublocation code is not padded with zeros in the Sublocation Code field on the Add/Modify Location window. The added zeros appear only in the Location Code field.

- In this way, while the location code can appear to be from five to nine digits in length, it is always stored as nine digits. For example,

If the Main Location Code text box displays...	And the Sublocation Code text box displays...	The Location Code field displays...	And Virtua stores the location code as...
M	000S	M000S	0000M000S
M	SSSS	MSSSS	0000MSSSS
MM	00SS	MM000S	000MM000S
MM	000S	MM000S	000MM000S
MMMM	SSSS	MMMMSSSS	0MMMMSSSS
MMMM	000S	MMMM000S	0MMMM000S
MMMMM	SSSS	MMMMMSSSS	MMMMMSSSS

For example,

- If the Main Location Code text box contains a **2** and the Sublocation Code text box contains a **3** . . .
 - ♦ The Location Code text box displays **20003**.
 - ♦ Virtua stores the location code as **000020003**.
- If the Main Location Code text box contains a **10** and the Sublocation Code text box contains a **30** . . .
 - ♦ The Location Code text box displays **100030**.
 - ♦ Virtua stores the location code as **000100030**.

10.4.1.3.2 Uniqueness of Location Codes

Each location code must be unique. When you add a new location, Virtua increments the location code automatically, based on those that are already in use. Innovative recommends that you accept the system-assigned codes, as they are always unique.

If the location code is NOT unique, when you try to save the new location, the following error message appears (*Figure 10-16*).

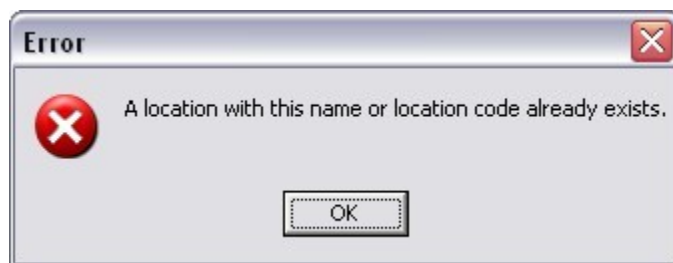


Figure 10-16. Error Message for Duplicate Location Code

10.4.1.4 Specifying the Location as a Paging Location

The Paging Location check box lets you designate the current location as a paging location.

A paging location is any main location or a sublocation from which your library allows page requests.

- Usually, page requests are placed on items in closed stacks.

- A page causes an automated request that alerts staff to retrieve the item from the paging location and hold it for the requester in a specified location.

For details on page requests, see the *Virtua Circulation Control/Introduction and Basic Transactions User's Guide*.

10.4.1.5 Specifying the Location as a Pickup Location

The Pickup Location check box lets you designate the current location is a pickup location.

A pickup location is any main location or sublocation from which your library allows patrons to pick up requested items.

- If you select the Pickup Location check box, the current location will be included in the list of available pickup locations for requests in the Virtua client.
- If you do NOT select the Pickup Location check box, this location will NOT be displayed in the list of available pickup locations for requests.

For details on how pickup locations are used, see the *Virtua Circulation Control/Requests User's Guide*.

10.4.1.6 Selecting a Request Group for the Pickup Location

When the Pickup Location check box is selected, the *Select a request group for this pickup location* check box is enabled. When the *Select a request group for this pickup location* check box is selected, you can choose a request group from the drop-down list to be associated with this pickup location. Setting this parameter has the following effects when request groups are in use at your site:

- When a request is placed in Chamo and the patron selects the pickup location, Virtua satisfies the request using the request group specified in the “Select a request group” setting.
- When a request is placed in the client and the user selects that pickup location in the Request Wizard, Virtua automatically populates the Request From Group drop-down setting with the appropriate request group and disables the setting so that it cannot be modified.

To set the *Select a request group for this pickup location* option,

1. Make sure the Pickup Location check box is selected.

2. Select the *Select a request group for this pickup location* check box.
3. Select a request group from the drop-down list. The drop-down list contains values configured in the Request Groups parameter

10.4.1.7 Specifying the Location as an Item Booking Pickup Location

The Item Booking Pickup Location check box lets you designate the current location as a pickup location for items that have been booked.

An item booking pickup location is any main location or sublocation from which your library allows patrons to pick up booked items.

- If you select the Item Booking Pickup Location check box, the current location will be included in the list of available pickup locations for bookings in the Virtua client.
- If you do NOT select the Item Booking Pickup Location check box, this location will NOT be displayed in the list of available pickup locations for bookings.

For details on item booking functionality, see the *Virtua Circulation Control/Introduction and Basic Transactions User's Guide*.

10.4.1.8 Hiding Holdings and Items

The Hide Holdings/Items check box lets you specify whether holdings and items at the current location are hidden in the OPAC from guest users, or any non-authenticated user. The setting works in conjunction with the Apply Mandatory Filters for Hidden Locations check box on the OPAC Basic Options window in the OPAC parameters (see the *Virtua Profiler/OPAC Parameters User's Guide*).

Note: The Apply Mandatory Filters for Hidden Locations check box MUST be selected in order for the Hide Holdings/Items setting to take effect.

To hide from guest users all holdings and items at this location,

- Select the Hide Holdings/Items check box AND select the Apply Mandatory Filters for Hidden Locations check box on the OPAC Basic Options window.

Notes:

- For details on how to mask individual records from view in the OPAC, see the *Virtua Cataloging User's Guide*.
- If you have FRBR or linked bibliographic records in your database, you should not enable the Hide Holdings/Items option. Instead, you should use item masking to hide records in a FRBR or linked bibliographic record database. For information on masking records, see the *Virtua Cataloging User's Guide*.

10.4.1.9 Choosing a Library Calendar

The Calendar drop-down list setting lets you assign a library calendar to the current location. The library calendar that is associated with a location is used to calculate due dates and fines.

The Calendar drop-down list contains all the library calendars that have been defined via the Library Calendars parameter, plus a “None” option. If the Calendar setting is set to “None” for a sublocation, the sublocation will inherit the calendar assigned to the main location. For a main location, “none” means that there is no calendar assigned yet to that main location.

10.4.1.10 Configuring a Fine Receipt Number

The Next Receipt Number field lets you configure a starting value for an incrementing fine receipt number. If you properly configure the Receipt Number label on the Fine Receipt Setup window in the client or on the Fine tab of the Receipt/Slip Setup parameter in the Profiler, this receipt number will appear on the first printed payment receipt and will be incremented for every subsequent printed payment receipt.

The characteristics of the Next Receipt Number field are as follows:

- The field is optional.
- The value can contain up to 50 alphanumeric characters.
- The value can contain more than one number, but Virtua will always automatically increment only the number at the end of the string.
- You can change the number at any time to suit your needs.

10.4.1.11 Defining Valid Item Class and Collection Code Combinations

The Item Data button lets you define the valid item class and collection code combinations that may be applied to an item shelved at a particular location. In the Virtua client, an error message will be displayed if you attempt to save an item record with an item class/collection code combination that is not one of the valid combinations defined for its shelving location.

Note: If you do not specify any valid item class/collection code combinations for a given shelving location, Virtua will not perform a check for data integrity when an item record with that shelving location is saved.

To define the valid combinations,

- Click the Item Data button in the top portion of the Add/Modify Main Location window to view the Configure Item Data Elements window ([Figure 10-17](#)), where you can define the item class/collection code combinations that may be applied to an item shelved at this location.

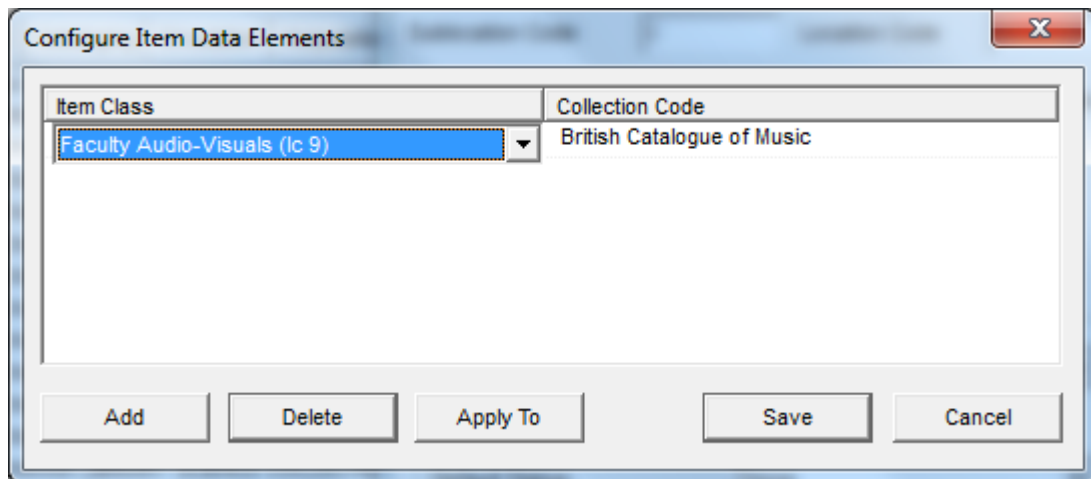


Figure 10-17. Configure Item Data Elements Window

The list box on the Configure Item Data Elements window displays each valid item class/collection code combination that you have defined for this shelving location. You can edit an item class/collection code combination by selecting the line, double-clicking the Item Class or Collection Code value, and selecting a new value from the drop-down list.

Clicking the Apply To button opens the Apply Settings window ([Figure 10-18](#)), where you can apply the item class/collection code combinations you define for one location to other locations.

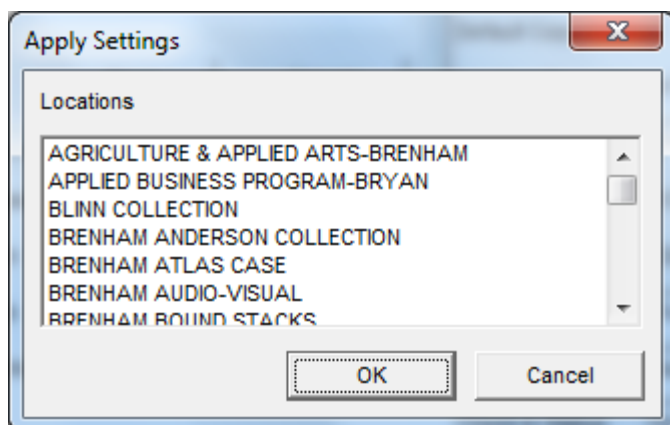


Figure 10-18. *Apply Settings Window*

Note: The InfoStation Item Data Integrity report reports on the validity of items based on the Item Data Elements configuration.

10.4.1.12 Additional Location Information

Four fields on the General tab let you specify additional library location information:

Abbreviated Name – The Abbreviated Name setting lets you specify an abbreviated name for the location or sublocation. The abbreviated name can then be used in place of the full location name data element when printing spine labels.

Alternate Name – The Alternate Name setting lets you specify an alternate name for the location or sublocation.

Phone Number – The Phone Number setting lets you specify a telephone number for the location or sublocation.

Mailing Address – The Mailing Address setting lets you specify a mailing address for the location or sublocation.

Email Address – The Email address lets you specify an e-mail address for the location or sublocation. If purchase request e-mails are enabled, Virtua uses this e-mail address to send an e-mail notification to library staff when a purchase request is added or updated. See the *Virtua Profiler/ Acquisitions Parameters User's Guide* for information about configuring purchase request e-mail notifications.

10.4.2 Add/Modify Location Window – Inherited Values Tab

On the Inherited Values tab you can set values for main locations. These values will be applied to all sublocations of the main location.

10.4.2.1 Setting Default Item Values

You can set default item values for each *main* location. The default item values you set for a main location are used by all its sublocations. Virtua applies default item values as follows:

- To the *first* item record you create for a bibliographic or holdings record.
- When you add an item record to a bibliographic or holdings record without highlighting an existing item on the View Record window.

Default item values consist of the following settings:

- **Default Item Class** - A valid item class, which you select from the Default Item Class drop-down list. For details on configuring item classes, see the *Virtua Profiler/Circulation Parameters User's Guide*.
- **Default Copy Number** - The default copy number of a new item, which you type in the Default Copy Number text box. This value can be any number up to four digits in length.
- **Default Loan Period** - The default loan period of a new item, which you specify in the provided field. You can enter a value up to four digits in length to specify the number of days in the default loan period.
- **Use Item Record Loan Period** - A check box that indicates whether the loan period for a new item is determined by the Default Loan Period (see above) or by the loan rules specified in the Location + Patron + Item Matrix. For details, see the *Virtua Profiler/Circulation Parameters User's Guide*.
- **Default PAC Code** - The default preservation and conservation (PAC) code that will be assigned to new items. Select the code from the drop-down list. The list is populated by those PAC codes defined in the Preservation and Conservation Codes parameter, which appears on the Cataloging tab in the Virtua Profiler. For details, see the *Virtua Profiler/Cataloging Parameters User's Guide*.
- **Default Item Barcode Type** - The default barcode type (Regular, RFID, or Both) that will be assigned to new items created at the location.

- **Default Status** - The item status that will be assigned to new items. Select the status from the drop-down list. The list is populated by those item statuses defined in the Status Displays parameter. For details, see the chapter "[Setting Up Item Statuses](#)" in this user's guide.

10.4.2.2 Setting Default Reserve Values

You can set default reserve values for each *main* location. The default reserve values you set for a main location are used by all its sublocations.

Reserve items are items placed on short-term loan for a specified length of time, usually in a restricted area. For example, academic libraries create reserve lists when faculty members set aside materials for students in a specific class during the semester or quarter that the class is taught. For details, see the *Virtua Circulation Control/Introduction and Basic Transactions User's Guide*.

For each main location, you can set default values for items that are added to a new reserve list. The default reserve values consist of . . .

- **Default Reserve Item Class** - Any valid item class as defined in the Item Class Definitions parameter, which you select from the drop-down list box.

Note: Even if reserves are not activated, Virtua requires a default reserve item class for every main location. If this value is not present, Circulation cannot function correctly.

- **Default Reserve Location** - Any main location or sublocation, which you select from the drop-down list box.

Note: Even if reserves are not activated, Virtua requires a default reserve item location for every main location. If this value is not present, Circulation cannot function correctly.

- **Default Reserve Start Date** - The date the item goes on reserve, or becomes active. You select this date using the calendar that pops up when you click the down arrow.
- **Default Reserve End Date** - The date the item comes off reserve, or becomes inactive. You select this date using the calendar that pops up when you click the down arrow.

- **Reserve Pull Period Days** - The expected number of days that the library needs to process reserve material for the term. You can specify the Pull Period by typing any number in the text box provided.
 - ◆ Virtua calculates a Pull Date based on this period.
 - ◆ Virtua checks the Pull Date in allowing or disallowing check-outs and renewals.
 - ◆ The Pull Date is also used to produce a Pull List for staff to use to search and pull reserve materials from the stacks.

With the exception of the Pull Period, the default reserve values you specify in the Location Names parameter are the values that appear on the Create Reserve Item window in the Virtua client. On the Create Reserve Item window, you can accept the default values or choose other values.

10.4.2.3 Setting the 3M Check-in Flag

You can set the Check-in Flag 3M for each *main* location. The setting you choose for a main location is used by all its sublocations. The setting of the Check-in Flag 3M determines whether you allow patrons to check *in* items with a 3M SelfCheck machine at a given location.

Note: This parameter does not affect a patron's ability to check *out* an item with the 3M SelfCheck machine. As long as the 3M SelfCheck machine is properly logged in to the Virtua server, your patrons can use it to check out items when the Check-in setting is disabled.

You can set the flag to either . . .

- **Allowed** - Your patrons can check in items from a 3M SelfCheck machine at this location.
-OR-
- **Not Allowed** - Your patrons cannot check in items from a 3M SelfCheck machine at this location.

For more information on setting up the 3M SelfCheck machine, see the *Virtua 3M Patron SelfCheck Interface Startup Guide*.

10.4.2.4 Setting the Amnesty Flag

You can set the Amnesty Flag for each *main* location. The setting you choose for a main location is used by all its sublocations.

The Amnesty Flag determines whether fines are assessed to a patron when an overdue item is checked in or renewed at a given location. This setting makes it easy for your library to hold amnesty periods to encourage patrons to return overdue items.

You can set the Amnesty Flag to either . . .

- Fines will NOT be assessed when an overdue item is checked in or renewed.
- OR-
- Fines will be assessed when an overdue item is checked in or renewed.

10.4.2.5 Setting the Check-in Status

The Check-in Status setting lets you specify which status will be assigned to items when they are checked in at a given location. The setting you choose for a main location is used by all its sublocations.

The Check-in Status drop-down list displays those item statuses defined in the Status Displays parameter. You can select any status as long as it has been defined with an Age Threshold other than 0 in the Status Displays parameter. If the status is defined with an Age Threshold of 0, the Check-in status will not be assigned. Instead, items checked in at that location will be set to Available.

If you set the Check-in Status to None, items will become Available immediately after they are checked in.

For details on setting up item statuses, see the chapter [“Setting Up Item Statuses”](#) in this user’s guide.

10.4.2.6 Choosing a Use Check-in Date Setting

The Use Check-in Date setting lets you choose a check-in date and time to be used for all items that are checked in at a given location. This parameter allows you to backdate check-ins. The setting you choose for a main location is used by all its sublocations.

- If you do NOT select the Use Check-in Date check box, Virtua uses the *current* date and time at check-in.
- If you select the Use Check-in Date check box, at check-in Virtua uses the date and time specified in the Use Check-in Date display area.

When you specify a particular check-in date and time . . .

- Fines are calculated from that date and time.
- The Transaction Log window displays the transaction date as the check-in date; the back-dated check-in date appears in the additional information area on the right.

10.4.2.7 Selecting Check-in Locations

The Check-in Locations list box lets you select main locations as “Check-in Locations” for the location that you are configuring. You can check in an item at the location you are configuring ONLY if the item being checked in is shelved at or was checked out from one of the locations selected in the Check-in Locations list.

If you try to check in an item that is not allowed to be checked in based on the Check-in Location selections, Virtua will display an error message, telling you where the item should be checked in.

Note: By default, when you add a new location in the Location Names parameter, Virtua automatically selects that location in the Check-in Locations list box for every previously configured location. If you do not want this to happen, configure the [Check-in Location Default parameter](#).

10.4.2.8 Setting the Create Received Items Setting

You can set the Create Received Items setting for each *main* location. The setting you choose for a main location is used by all its sublocations.

The Create Received Items check box lets you specify whether item records should be created automatically for purchase order line items that are received for a given location. The associated Item Status drop-down lets you select the status to be assigned to those item records.

- If you do NOT select the Create Received Items check box, Virtua does not create item records automatically when purchase order line items are received for this location. You must add item records manually, via the workflow described in the *Virtua Cataloging User’s Guide*.

- If you select the Create Received Items check box, Virtua automatically creates an item record for each purchase order line item copy that is received for this location. The new item record is given the status specified in the Item Status drop-down list box.

Note: Item records are only created for items received with a receipt status of either “Received Satisfactorily” or “Accepted as Duplicate.”

The Item Status drop-down list box is populated with the item statuses defined in the Status Displays parameter.

For details on working with item statuses, see the chapter “[Setting Up Item Statuses](#)” in this user’s guide. For more information on the automatic creation of item records in the Virtua client, see the *Virtua Acquisitions User’s Guide*.

10.4.2.9 Allowing Items to Float

The Allow Floating Items check box and the “Min item count threshold” text box let you enable and configure floating collections for each location.

Important: In addition to the settings on this window, you must run the script **Schedule_FloatingMV_Refresh.sh** to enable floating collections. See the *System Management: Circulation User’s Guide* for information about this script.

- The Allow Floating Items check box lets you determine whether items belonging to the current location are permitted to “float”—i.e., whether these items will take their check-in location to be their shelving location.
- The “Min item count threshold” lets you define the minimum number of items that must have the current location as their shelving location before items belonging to this location can “float” and have different shelving locations assigned. Configuring this setting ensures that there are never so many of this location’s items being shelved at other locations that the current location has an insufficient number of items on the shelves.

Note: When the “Min item count threshold” is set to 0, then items belonging to this location are always allowed to float.

Note that while this setting sets an absolute limit on the number of a location’s items that can float, you can place further limits on floating items based on item class via the Location + Item matrix. See the *Virtua Profiler / Circulation Parameters User’s Guide* for more information. In addition, each item can be individually configured to float or not

float via the Item Information window in the Virtua client; see the *Virtua Circulation Training Guide*.

10.4.2.10 Accepting Floating Items

The Accept Floating Items check box and the “Max item count threshold” text box let you determine whether a location accepts floating items onto its shelves and lets you set limits on accepting floating items.

- The Accept Floating Items check box lets you determine whether the current location will accept floating items that are owned by other locations. When this check box is selected, any floating items checked in to the current location will be assigned this location as the shelving location.
- The “Max item count threshold” defines the maximum number of items that can be shelved at this location and still accept floating items. When this threshold is reached, the location will no longer accept floating items from other locations. Setting a maximum item count limit can ensure that there are never too many items shelved at this location.

Note:

- When the “Max item count threshold” is set to 999 999 999, the location will always accept floating items.
- If a floating item has a given location as its latest shelving location and is checked in to the same location, the item will always be accepted, even if the “Max item count threshold” has been reached.

While these setting sets an absolute limit on the number of floating items that be accepted at each location, you can place further limits on accepting floating items according to item class on the Location + Item matrix. See the *Virtua Profiler / Circulation Parameters User’s Guide* for more information about these settings.

10.4.2.11 Setting the Process Denied Loans Flag

When the Process Denied Loans check box is selected, Virtua will automatically resubmit loan requests that are denied for the location and all of its sublocations. If the loan request is denied again, Virtua will submit the request as a hold request. If the hold request is denied, Virtua will change the request expiration date to that day. When this occurs, the **psdriver.exe** output includes a diagnostic code, along with a reason for the final denial of the request. You do not have to enable Logging Level 1 for this information to be logged.

The Process Denied Loans flag is especially useful for the default location of Chamo, where denied loan requests may not be regularly monitored by library staff. For more information about requests, see the *Virtua Circulation Control/Requests User's Guide*.

10.4.2.12 Setting the Unfiltered Location Flag

When the Unfiltered Location check box is selected, items and holdings belonging to this location, and bibliographic records that have these items or holdings attached, will always appear in Browse search results and be accessible in the OPAC even if location filtering (via the Location button on the Search window) would normally disallow it.

This setting is especially useful for libraries that want a way for their electronic resources to always appear in search results regardless of any location filter that is applied.

10.4.2.13 Defining the Receipt Header

The Receipt Header field lets you create text that will appear at the beginning of each receipt for each main location and its sublocations. When this field is populated, it overrides the Starting Text defined in the Receipt/Slip Setup windows in the Virtua client. If this field is blank, the Starting Text defined in the Receipt/Slip Setup windows in the Virtua client will be printed.

To create a receipt header, type your desired receipt header in the Receipt Header text box.

Note:

- The text configured for this field will appear above the text configured for each receipt or slip configured via the Circulation tab > System Parameters > Receipt/Slip Setup parameter (see the *Virtua Profiler/Circulation Parameters User's Guide*).
- The receipt *footer* is configurable via the Circulation tab > System Parameters > Receipt/Slip Setup parameter, and it will apply to all receipts and slips at all locations (see the *Virtua Profiler/Circulation Parameters User's Guide*).

11. Working with the Log-in Location Default Parameter

The Log-in Location Default parameter ([Figure 11-1](#)) lets you specify Virtua's default behavior with regard to a user's ability to log in to newly created locations. When a library adds a new location to the system, Virtua automatically adds the location to the Log-in Locations list box available in every user's profile. The user can log in (i.e., choose the location from the Choose Location drop-down list in the Virtua client) to only those locations that are *selected* in the Log-in Locations list box. The Log-in Location Default parameter lets you determine if you want Virtua to automatically *select* locations that are newly added to the Log-in Locations list box.

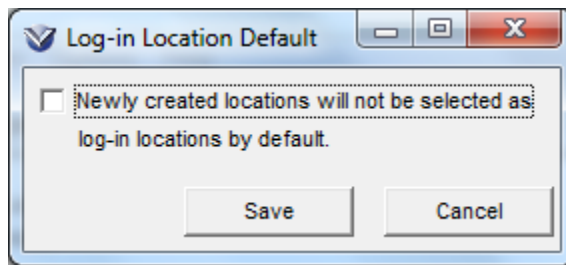


Figure 11-1. Log-in Location Default Window

If the Log-in Location Default parameter is . . .

- **Disabled** – By default, Virtua will select newly created locations when they are automatically added to the Log-in Location list box in a user's profile. In this way, the user will be allowed to log in to the locations.
- **Enabled** – By default, Virtua will NOT select newly created locations when they are automatically added to the Log-in Location list box in a user's profile. In this way, the user will NOT be allowed to log in to the locations.

12. Working with the Override User-Level Location Parameter

The Override User-Level Location parameter allows you to specify how Virtua determines the default log-in location when a user logs in to the Virtua client. If the Override User-Level Location parameter is . . .

- **Disabled** - Virtua sets the log-in location to the location specified in the user profile.
- **Enabled** - Virtua checks the Computer Name of the workstation where the user is logging in and compares it to the Workstation Prefix values configured for each location in the Location Names parameter.
 - ◆ If the Computer Name of the workstation matches the Workstation Prefix value of any location, then Virtua sets the log-in location to that location.
 - ◆ If the Computer Name of the workstation does NOT match a configured Workstation Prefix, Virtua sets the log-in location to the location specified in the user profile.

Notes:

- You can determine the Computer Name of your Windows® operating system workstation by accessing the System Properties window, available from the Control Panel. The name of your computer will be listed as the “Full computer name.”
- For details on specifying the log-in location in the user profile, see the section “[Configuring the User Information Tab](#)” in this user’s guide. For details on configuring the Location Names parameter, see the section “[Setting Up Locations](#)” in this user’s guide.

To set the Override User-Level Location parameter,

1. On the Override User-Level Location window ([Figure 12-1](#)), select the Override User-Level Location check box to override the log-in location specified in the user profile and always check for a matching Workstation Prefix to determine the log-in location.
-OR-
De-select the Override User-Level Location check box to always use the log-in location specified in the user profile when a user logs in to the Virtua client..



Figure 12-1. Override User-Level Location Window

2. Click the Save button.

Your changes are saved to the database.

13. Working with the Password Management Parameter

The Password Management parameter allows you to configure global rules for user passwords. The rules you configure will apply to the passwords of all Virtua users.

Note: User passwords are configured on the Authentication/Authorization tab of the Add/Modify User window. For details, see the section “[Configuring the Authentication/Authorization Tab](#)” in this user’s guide.

You can specify . . .

- A minimum number of characters for the password.
- Whether the password must contain mixed uppercase and lowercase characters.
- Whether the password must contain mixed alphanumeric characters.
- The number of previous passwords that may not be repeated.
- The number of unsuccessful log-in attempts allowed before the account is locked.

Note: Virtua’s password management functionality does NOT apply to users for whom LDAP authentication is enabled. For details on working with LDAP authentication, see the section “[Working with the LDAP Options Parameter](#)” in this user’s guide.

This chapter covers the following topics:

- ⇒ [Setting the Password Management Parameter](#)
- ⇒ [Descriptions of Password Management Settings](#)

13.1 Setting the Password Management Parameter

To set the Password Management parameter,

1. On the Password Management window ([Figure 13-1](#)), enter the number you would like to specify as the minimum number of characters for a user password in the *Minimum password length* text box.



Figure 13-1. Password Management Window

2. Select the *Require mixed case characters* check box to specify that the user password must contain both uppercase and lowercase characters.
3. Select the *Require mixed alphanumeric characters* check box to specify that the user password must contain both letter characters and number characters.
4. In the *Number of previous passwords that may not be repeated* text box, type the number of previous passwords that Virtua will store in its password history for each user.
5. In the *Number of log-in attempts before account is locked* text box, type the number of failed log-in attempts Virtua will allow before the user's account is locked.
6. Click the Save button.

Your password management settings are saved to the database.

13.2 Descriptions of Password Management Settings

The following sections describe each setting on the Password Management window ([Figure 13-1](#)).

13.2.1 About Setting the Minimum Password Length

The *Minimum password length* text box specifies the minimum number of characters allowed for the user password. When a user profile is saved, Virtua verifies that the password specified on the Authentication/Authorization tab of the Add/Modify User window is at least the length specified by this setting. If the password is shorter than the required number of characters, Virtua displays an error message and the user profile is not saved.

If the *Minimum password length* setting is set to zero or is left blank, Virtua does not verify the length of the user password when saving the user profile.

13.2.2 About the Require Mixed Case Characters Flag

The *Require mixed case characters* check box allows you to specify whether or not the user password must contain both uppercase and lowercase characters. If the check box is selected, Virtua verifies that the password contains both uppercase and lowercase characters when the user profile is saved. If the password does not comply, Virtua displays an error message and the user profile is not saved.

13.2.3 About the Require Mixed Alphanumeric Characters Flag

The *Require mixed alphanumeric characters* check box allows you to specify whether or not the user password must contain both letter and number characters. If the check box is selected, Virtua verifies that the password contains both letter and number characters when the user profile is saved. If the password does not comply, Virtua displays an error message and the user profile is not saved.

13.2.4 About Setting the Number of Previous Passwords That May Not Be Repeated

The *Number of previous passwords that may not be repeated* text box allows you to specify the number of previous passwords that Virtua stores in its password history for each user. If this setting is set to 5, for example, when a user password is changed on the Authentication/Authorization tab of Add/Modify User window, Virtua verifies that the new password does not match any of the five previously-saved passwords for this user. If the password does match one of the five previous passwords, Virtua displays an error message and the user profile is not saved.

If this option is set to zero or is left blank, Virtua does not store a password history for users and does not perform any password history checks when a user profile is saved.

13.2.5 About Specifying the Number of Failed Log-ins Before the User Account is Locked

The *Number of log-in attempts before account is locked* text box allows you to specify the number of failed log-in attempts (i.e., the wrong password is provided for a particular user name) Virtua will allow before the user's account is locked. If a user's failed log-in attempts reach the number specified here, the user is locked out of all Z39.50 log-ins (Virtua client and Chamo), and an administrator must unlock the account by de-selecting the Account Locked check box on the [Authentication/Authorization tab](#) of the Add/Modify User window.

Note: Virtua treats password change attempts from the client as log-in attempts. If this option is set to 3, for example, the third failed password change attempt (due to an invalid password only, and not simply a mismatch on new password confirmation) causes the user account to be locked.

14. Working with the Permissions Default Parameter

The Permissions Default parameter lets you choose whether to grant all Virtua staff users the permission to view and use new Virtua features that are permission based. “New features” in this context are those features for which visual permissions have not yet been set in your database.

By default, when Virtua permissions are imported, Virtua enables the appearance and use of new features for ALL groups (and users inherit the settings). The Permissions Default setting (*Figure 14-1*) lets you choose to disable the appearance and use of new features for all groups, which then gives you the option to enable specific features for individual users as required using the User Profiles > Permissions window for that user or their group.

Note: For information about setting user permissions, see the section “[Configuring User Permissions](#)” in this guide.

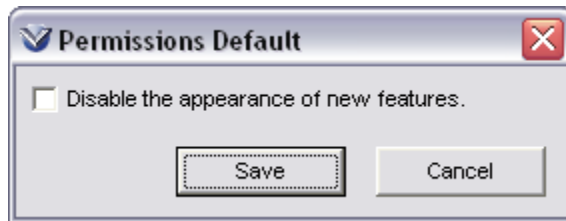


Figure 14-1. Permissions Default Window

To summarize, if the Permissions Default parameter check box is . . .

- **Selected** - Virtua users will NOT have access to new features when new user permissions are imported via the Import New Permissions feature.
- **De-selected** - Virtua users WILL have access to new features when new user permissions are imported via the Import New Permissions feature.

Important: If you want to disable the appearance of new features, you MUST enable this parameter BEFORE you import new permissions for the new version of Virtua. For information on importing new permissions, see “[Importing Files to Update Current User Permissions](#)” in this guide.

To disable the appearance of new features for all Virtua users,

1. Select the *Disable the appearance of new features* check box.
2. Click the Save button.

When you import a new permissions file, new features will be disabled for all users.

15. Working with the Postal Codes Parameter

The Postal Codes parameter allows you to configure a set of postal codes and associated city, state, county, and country names. The postal codes that you configure here can be used to populate the City, State, County, and Country fields on the Patron Editor window in the Virtua client.

Note: For details on working with the Patron Editor window, see the *Virtua Circulation Control/Patron Information User's Guide*.

Via the Postal Codes parameter, you can . . .

- Add new postal codes and associated city, state, county, and country names.
- Edit existing postal codes and associated city, state, county, and country names.
- Delete postal codes and associated city, state, county, and country names.

15.1 Adding a New Postal Code

To add a new postal code to the list,

1. On the Postal Codes window ([Figure 15-1](#)), click the Add button.

A new row appears at the bottom of the list.

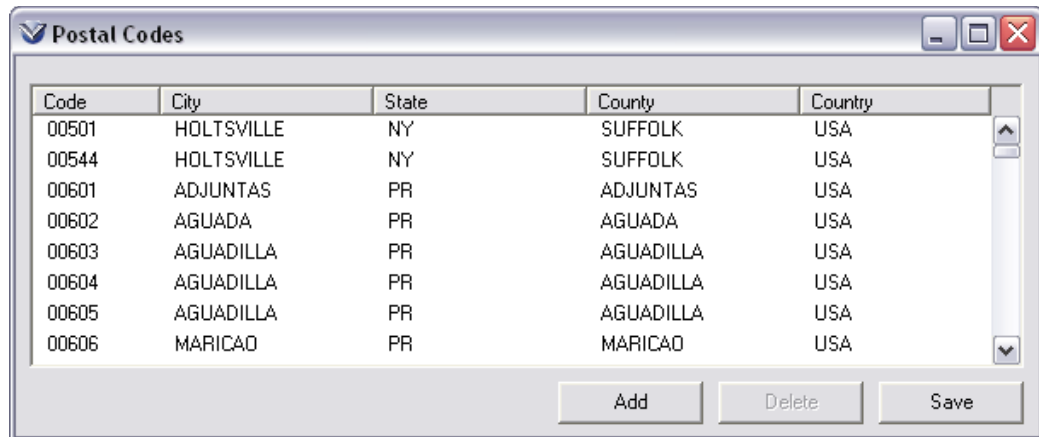


Figure 15-1. Postal Codes Window

2. In the Code column, type the postal code you want to add.
3. In the City column, type the city that corresponds with the new postal code.
4. In the State column, type the state that corresponds with the new postal code.
5. In the County column, type the county that corresponds with the new postal code.
6. In the Country column, type the country that corresponds with the new postal code.
7. Click the Save button.

The new postal code is saved to the database.

15.2 Deleting a Postal Code

To delete a postal code from the list,

1. On the Postal Codes window, highlight the postal code you want to delete.
2. Click the Delete button.

The postal code is deleted from the database.

15.3 Editing Postal Codes

To edit an existing postal code,

1. On the Postal Codes window, highlight the postal code that you want to edit.
2. Click the value in the Code column to edit it.
3. Click the value in the City column to edit it.
4. Click the value in the State column to edit it.
5. Click the value in the County column to edit it.
6. Click the value in the Country column to edit it.
7. Click the Save button.

Your changes are saved to the database.

16. Working with the Connection History Parameter

The Connection History parameter allows you to enable or disable logging of Virtua's connection history. If connection history logging is enabled via this parameter, Virtua records in the operation log the following data about each new server connection that is initiated:

- Session ID - A unique ID code associated with the session/connection.
- User ID - The user ID of the user that logged in to initiate the connection.
- Time and date stamp - The time and date that the connection was initiated.
- Client type - The type of client (Virtua client or third-party client such as SIP and Z39.50) that initiated the connection. Note that Chamo interactions are tracked separately.

This data is used to generate statistics on connection history via reports such as the InfoStation Server Response Times report. For details, see the *InfoStation/OPAC Reports Reference Guide*.

Note: Apart from the Connection History parameter setting, Virtua also records the fully qualified hostname of the machine associated with each transaction that is logged in the Circulation Audit Trail or the Circulation Transaction Log. Host names are available in the following tables (and their associated Ad Hoc views):

ACCTAUDIT2

ACQ_TRANSACTION_LOG

CIRC_TRANSACTION_LOG

OFFLINE_CIRC_TRANSACTION

PATRON_AUDIT_TRAIL

To set the Connection History parameter,

1. On the Connection History window (*Figure 16-1*), select the Collect Connection History check box to enable connection history logging.
-OR-
De-select the Collect Connection History check box to disable connection history logging.

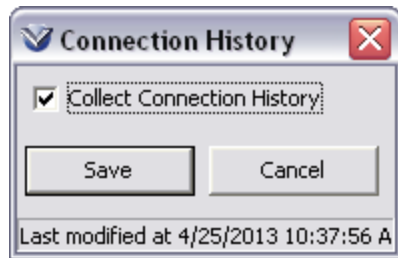


Figure 16-1. Connection History Window

2. Click the Save button.

Your changes are saved to the database.

17. Setting Up Item Statuses

Statuses appear throughout Virtua to indicate the condition, location, or state of items. Virtua uses item statuses to prompt you or to block your action at specific points of activity, such as when you are checking out an item or placing a request.

The Status Displays parameter lets you control various aspects of special and system-assigned statuses. This chapter provides details for working with the Status Displays parameter.

This chapter covers the following topics:

- ⇒ [Introduction to Item Statuses](#)
- ⇒ [Adding, Modifying, and Deleting Statuses](#)
- ⇒ [Configuring Status Settings](#)

17.1 Introduction to Item Statuses

Virtua uses two types of item statuses:

- System-assigned statuses
- Special statuses

Using the Status Displays parameter, you can set up special statuses and modify *some* aspects of system-assigned statuses.

Important: Keep in mind that item *statuses* are different from circulation *states*, which are descriptive conditions established by the software by pre-determined actions. Virtua uses the following circulation states: Available, Due, In-house Due, Reserve Due, and Recallable by.

17.1.1 About System-assigned Item Statuses

System-assigned item statuses and codes are used by Virtua to handle conditions that arise in day-to-day operations. The following table shows the current list of system-assigned statuses and their default settings.

Code	Default Description	Hold	Recall	Loan	Page	Age	Next Status
2700	On Reserve - <i>Added when a reserve is activated for the item. Remains on the item until the reserve is no longer active.</i>	Yes	Yes	Yes	Yes	0	<none>
3700	Damaged Processing - <i>Added when activated for the item via the Damaged button on the Activity tab of the Patron Information window.</i>	No	No	No	No	0	<none>
4600	Billed for Replacement- <i>Added when a bill notice is generated for the item by InfoStation/ CircReport.exe.</i>	Yes	Yes	Yes	Yes	0	<none>
4700	Missing - <i>Added to items found to be missing by the inventory report.</i>	Yes	Yes	Yes	Yes	0	<none>
4705	On Hold - <i>Added when the item has been trapped for a request.</i>	Yes	Yes	Yes	Yes	0	<none>
4710	At Bindery - <i>Added when the item has been sent for binding.</i>	Yes	Yes	Yes	Yes	0	<none>
4715	Lost Processing – <i>Added when activated for the item via the Damaged button on the Activity tab of the Patron Information window.</i>	No	No	No	No	0	<none>
5700	In Transit - <i>Added when an item that is not currently requested needs to be sent from the current location to a different location based on the item's shelving location.</i>	Yes	Yes	Yes	Yes	0	<none>
5705	In Transit Requested - <i>Added when an item with an outstanding request needs to be sent from the current location to a different location based on the request's pickup location.</i>	Yes	Yes	Yes	Yes	0	<none>

Code	Default Description	Hold	Recall	Loan	Page	Age	Next Status
5710	Requested for Hold - <i>Added to the item when placing a loan request (bib level or item level) or an item-level page.</i>	Yes	Yes	Yes	Yes	0	<none>
5720	Shelving - <i>Added to the item when it is checked in at its shelving location, if parameters (i.e., status age threshold and location check-in status) are configured to do so.</i>	Yes	Yes	Yes	Yes	0	<none>

You cannot add or delete system-assigned statuses, and you cannot modify their codes. You can, however, modify the following: description (Status Descriptor field), Age Threshold (Report tab), request and renewal settings (Requests/Circulation tab), and whether to suppress warning messages.

17.1.2 About Special Statuses

Special statuses are library-defined codes and definitions that reflect conditions not handled through the day-to-day operation of the software. A special status indicates a physical condition or location, such as Lost or Damaged, which cannot be predicted or established by the system.

You can create special statuses via the Status Displays parameter in the Virtua Profiler. Additionally, you can modify and delete existing statuses via the Status Displays parameter. Note that you can delete special statuses and modify their codes *only* when they are NOT in use (i.e., not assigned to an item).

Generally, special statuses are assigned to items manually as needed to reflect the item's current condition, location, or state. One exception is the delinquent item status, which you can configure InfoStation's Delinquent Patron Accounts report to assign to delinquent items automatically when you run the report. For InfoStation to use the delinquent item status, it must be defined in the Status Displays parameter and have a status code of **67xx**.

17.2 Adding, Modifying, and Deleting Statuses

Using the Status Displays parameter, you can . . .

- Add special statuses.
- Modify existing statuses, whether special or system-assigned.
- Delete special statuses.

This section provides brief, step-by-step instructions for adding, modifying, and deleting statuses. For details on configuring settings for your statuses, see the section “[Configuring Status Settings](#)” in this chapter.

17.2.1 Adding Special Statuses

To add a special status,

1. On the Global Settings tab, highlight Status Displays.
2. Right click and choose Add.

The Add New Status window appears, displaying the General tab (*Figure 17-1*).

Figure 17-1. Add New Status Window: General Tab

Note: Notice that the status bar at the bottom of the Add New Status window displays NOT SET! This message appears until you configure and save the new status.

3. On the General tab, in the Status Descriptor text box, type a brief description of the status.
4. In the First Digit Descriptor drop-down list box, select the first digit of the item status code.
5. In the Second Digit Descriptor drop-down list box, select the second digit of the item status code.
6. Accept the system-assigned Last Two Digits Code.
7. To suppress status warnings during check-out or check-in, click the Suppress Warning check box.
8. To prevent items with this status from appearing in Chamo, check the Mask Status check box.
9. To indicate that items with this status are “unserviceable” (i.e., not suitable for circulation), check the Unserviceable check box.

Note: The Virtua client has been enhanced to check for the presence of statuses that have been designated Unserviceable when you attempt to delete or save an item. An alert message will be displayed if...

- You try to save an unserviceable item, and no other serviceable items exist for the bibliographic or holdings record.
- OR-
- You try to delete a serviceable item, and no other serviceable items exist for the bibliographic or holdings record.

10. On the Requests/Circulation tab, select the check box for each request type, renewal type, and/or circulation transaction type that you want to allow for an item that carries the current status.
11. On the Reports tab, in the Age Threshold text box, type a value which indicates the amount of time after which the status should expire.
12. In the Age Threshold drop-down list box, select a unit of time, either Hours or Days.
13. If you want the status to be deleted from an item automatically after it has expired, select the Next Status check box.
14. If you selected the Next Status check box, select a status from the drop-down list box.
15. When you have finished configuring all the desired settings, click the Save button.

The new item status is saved to the database.

17.2.2 Modifying Existing Item Statuses

You can modify elements of both special statuses and system-assigned statuses. When you want to modify a status, keep in mind that . . .

- For a special status, you can modify the . . .
 - ◆ Name of the status (i.e., the Status Descriptor)
 - ◆ Status Code
 - ◆ Requests/circulation transactions allowed
 - ◆ Age Threshold
 - ◆ Next Status

Note: You can modify the status code of a special status *only* if it is NOT in use (i.e., not assigned to an item).

- For a system-assigned status, you can modify the . . .
 - ◆ Name of the status (i.e., the Status Descriptor)
 - ◆ Requests/circulation transactions allowed
 - ◆ Age Threshold
 - ◆ Next Status

Important: You cannot modify the code of a system-assigned status. System-assigned status codes are included in the parameter table initialization for new databases, migrations, and updates.

To modify an existing status,

1. On the Global Settings tab, double-click Status Displays.
2. Double-click the status that you want to modify.

The Modify Status window appears, displaying the General tab ([Figure 17-2](#)).

Modify On Order Status

General | Requests/Circulation | Reports

Status Descriptor: On Order

First Digit Descriptor: 3 Display warning to operator

Second Digit Descriptor: 7 Check-out, check-in, and renew

Last Two Digits Code: 02

Status Code: 3702

☐ Suppress Warning

☒ Mask Status

☐ Unserviceable

Save Cancel

Last modified at 12/29/2010 12:46:03 PM by Root User

Figure 17-2. Add/Modify Status Window: General Tab

The last modified date/time appears in the status bar at the bottom of the Modify Status window.

3. Modify the status setting as needed. For details, see the section “[Configuring Status Settings](#)” in this chapter.
4. When you are finished modifying the status values, click the Save button.

Virtua saves your changes to the database.

17.2.3 Deleting Special Statuses

You can delete a special status *only* when it is not in use (i.e., not assigned to an item). You cannot delete system-assigned statuses, regardless of whether they are in use.

To delete a Special Status,

1. On the Global Settings tab, double-click Status Displays.
2. Highlight the status you want to delete, right click, and then choose Delete.
 - If the status is not a system-assigned status AND if the status is NOT in use, it is deleted from the database.
 - If the status is a system-assigned status OR if the status is currently assigned to an item, an error message appears ([Figure 17-3](#)), and the status is not deleted:

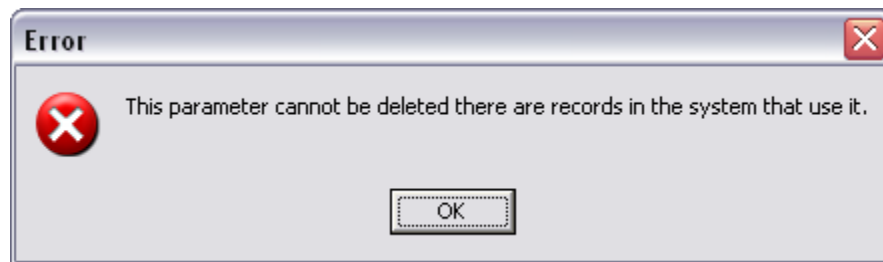


Figure 17-3. Error Message When Deleting a System-assigned or In-use Status

17.3 Configuring Status Settings

On the Add/Modify Status window, you can configure a number of settings for both special and system-assigned statuses.

- For a special status, you can configure the . . .
 - ◆ Name of the status (i.e., the Status Descriptor)
 - ◆ Status Code
 - ◆ Requests/circulation transactions allowed
 - ◆ Age Threshold
 - ◆ Next Status

You can configure these setting when you add a special status, or you can modify these settings for an existing status.

- For a system-assigned status, you can configure the . . .
 - ◆ Name of the status (i.e., the Status Descriptor)
 - ◆ Requests/circulation transactions allowed
 - ◆ Age Threshold
 - ◆ Next Status

The following sections describe in detail the elements that you can configure in the Status Displays parameter.

17.3.1 About General Settings

General settings appear on the General tab of the Add/Modify Status window ([Figure 17-4](#)).

Add New Status

General | Requests/Circulation | Reports

Status Descriptor:

First Digit Descriptor: 2 No action

Second Digit Descriptor: 1 Check-out

Last Two Digits Code: 15

Status Code: 2115

☐ Suppress Warning

☐ Mask Status

☐ Unserviceable

Save Cancel

NOT SET!

Figure 17-4. Add/Modify Status Window: General Tab

General settings consist of the following settings:

- **Status Descriptor** - A brief, alphanumeric description of the status which will appear throughout the system to identify the status to Virtua users.
- **First Digit Descriptor** - The first digit of the four-digit Status Code. It describes the *action* that will be taken when a transaction is performed on items with the status. Each item status must be assigned one of the following action codes.

Code	Action
2	No action.
3	Display warning to operator.
4	Display warning and clear status
5	Clear status without warning.
6	Warn during all transactions.
7	Display warning to operator.

Note: Most system-assigned statuses follow the status code conventions described above. However, there are several exceptions to these conventions:

- One exception is the In Transit status. Typically, a 5xxx status clears the status without warning. Status 5700 (In Transit), however, warns the user and deletes the status.
- Another exception applies to 6xxx statuses. A 6xxx status always causes Virtua to display a warning, regardless of the type of transaction or the second digit descriptor. However, in the following special cases, a warning is displayed AND the status is deleted:
 - ◆ Check-out transaction on an item with a 61xx status
 - ◆ Check-in transaction on an item with a 62xx status
 - ◆ Renewal transaction on an item with a 63xx status
 - ◆ Check-in OR check-out transaction on an item with a 64xx status
 - ◆ Check-out OR renewal transaction on an item with a 65xx status
 - ◆ Check-in OR renewal transaction on an item with a 66xx status
 - ◆ Any type of transaction on an item with a 67xx status

- **Second Digit Descriptor** - The second digit of the four-digit Status Code. It defines the transaction that will *trigger* the action defined by the first digit. Each item status must be assigned one of the following trigger codes.

Code	Trigger Transaction(s)
1	Check-out
2	Check-in
3	Renewal
4	Check-out and check-in
5	Check-out and renewal
6	Check-in and renewal
7	Check-out, check-in, and renewal
8	Reserved for acquisitions

- **Last Two Digits Code** - The last two digits of the Status Code. They are predicted and assigned by the system. These digits let you set up to 99 statuses with the same action and trigger. You can edit these digits if you like, but Innovative recommends that you use the default code.

- **Status Code** - A read-only field, which the system populates automatically based on the values in the First Digit Descriptor, Second Digit Descriptor, and Last Two Digits Code.

Important: The Status Code *must* be unique for each status. If it is not, when you click the Save button, the software returns an error message indicating that the code already belongs to an existing status.

17.3.2 About Request/Circulation Settings

On the Requests/Circulation tab ([Figure 17-5](#)) of the Add/Modify Status window, you can select the check box of each type of request, renewal, and/or circulation transaction that you want to allow for items that carry the current status.

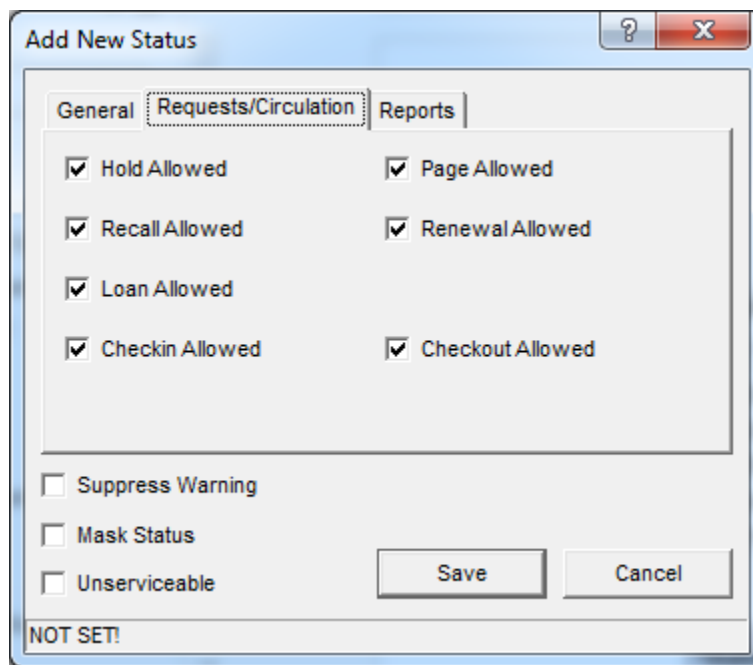


Figure 17-5. Add/Modify Status Window: Requests/Circulation Tab

The following check boxes are available on the tab: Hold Allowed, Recall Allowed, Loan Allowed, Page Allowed, Renewal Allowed, Check-in Allowed, Check-out Allowed and Stack Request Allowed (ASR functionality only).

17.3.3 Working with the Reports Tab

Using the Reports tab ([Figure 17-6](#)), you can define a period of time after which an item status will expire and can be automatically deleted or updated to a new status.

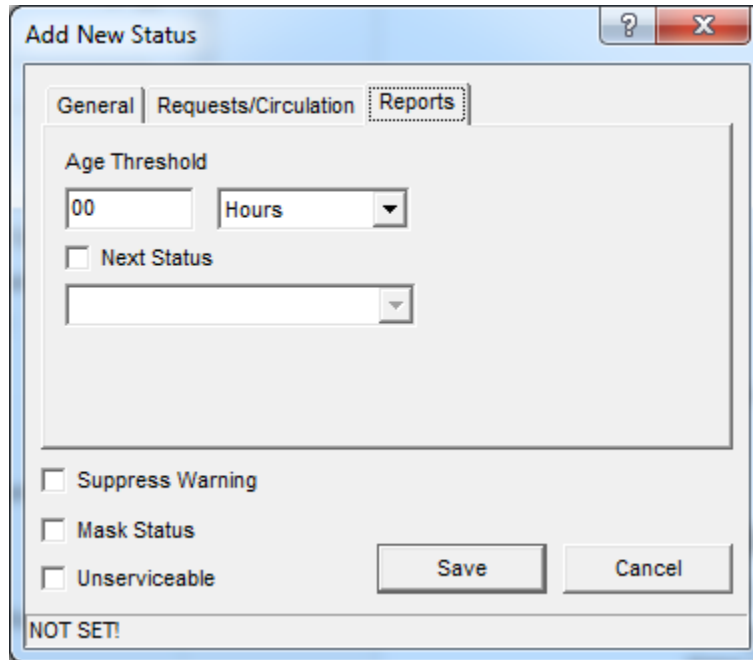


Figure 17-6. Add/Modify New Status Window: Reports Tab

The Reports tab displays two settings, Age Threshold and Next Status:

- **Age Threshold** - The amount of time in which an item status will expire. The Age Threshold setting consists of two parts:
 - ◆ A value, which you type in the text box to specify the number of days or hours after which a given status should expire.
 - ◆ A unit of time, either Hours or Days, which you select from the drop-down list to define the value that you typed in the text box.

For example, you might set the Age Threshold to 24 Hours, which means that the item status would expire 24 hours after it had been assigned to an item.

Note: If you set the Age Threshold to zero, the status will *never* expire and will be deleted from an item only if you delete it manually or perform a transaction that triggers its removal.

- **Next Status** - Lets you specify what will happen after the item status has expired according to the Age Threshold. For a given item status . . .
 - ♦ If you select the Next Status check box and you select a Next Status from the drop-down list, when the status expires, it will be deleted, and the Next Status will automatically be assigned to the item.
 - ♦ If you select the Next Status check box and you select NONE from the drop-down list, when the status expires, it will be deleted, but a new status will NOT be assigned to the item. If no other statuses are assigned to the item, it will become Available.
 - ♦ If you do NOT select the Next Status check box, when the status expires, it will not be deleted from the item automatically.

For an item status to be deleted and replaced with the designated Next Status, you must be running **ItemStatusMonitor.exe**. For details, see the *Virtua System Management/Cataloging User's Guide*.

18. Working with the User List

The User List parameter lets you view information about each user that has been configured in the Virtua Profiler. You can filter the list of users displayed on the User List window (*Figure 18-1*) by using the Search feature.

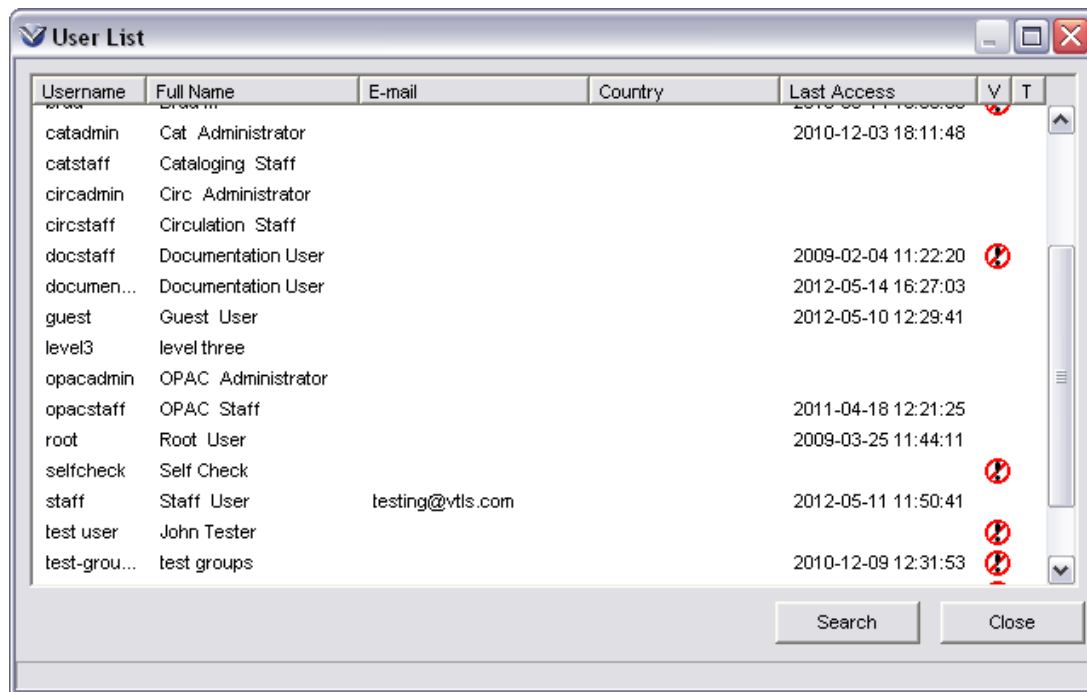


Figure 18-1. User List Window



This chapter covers the following topics:

- ⇒ [Aspects of the User List Window](#)
- ⇒ [Searching by User](#)

18.1 Aspects of the User List Window

The display panel on the User List window (*Figure 18-1*) contains a one-line entry for every user that has been configured in the Virtua Profiler.

The display panel contains the following columns of information:

- **Username** - Displays the username for this user that was specified on the User Information tab of the Add/Modify User window.
- **Full Name** - Displays the full name of this user. The full name is formed by combining the following values from the User Information tab of the Add/Modify User window: Prefix + First Name + Last Name.
- **E-mail** - Displays the user's e-mail address, as specified on the Additional Information tab of the Add/Modify User window.
- **Country** - Displays the country associated with this user, as specified in the ISO Country field on the Additional Information tab of the Add/Modify User window.
- **Last Access** - Displays the date and time when the user last logged in to Virtua.
- **V** - Indicates whether this user is a valid Virtua user, as specified by the Valid From and Valid To dates defined on the User Information tab of the Add/Modify User window. The V column is blank for valid users, and displays  if the user is not valid.
- **T** - Indicates whether this user is a test user. The T column displays  if the user is a test user, and is blank for all other users.

The User List window also displays two buttons:

- **Search** - Displays the Search User window, where you can initiate a search for Virtua users. For details, see the section “[Searching by User](#)” in this chapter.
- **Close** - Closes the User List window.

18.2 Searching by User

The Search Users window (*Figure 18-2*) allows you to filter the user information that is displayed on the User List window (*Figure 18-1*).

Figure 18-2. Search Users Window

To search by user,

1. From the User List window, click the Search button.

The Search Users window appears ([Figure 18-2](#)).

2. On the Search Users window, enter the user information in the desired fields.

Note: You can use the asterisk symbol (*) as a “wild card” character in any of the text fields on the Search Users window.

3. Click the OK button to execute the search.

The users that meet your search requirements are displayed on the User List window ([Figure 18-1](#)).

19. Working with User Profiles and Permissions

User Profiles let you define the username, password, description, default log-in location, and group membership for each Virtua user. Additionally, the User Profiles parameter lets you configure user permissions, which determine which functions, actions, and controls each Virtua user or group of users has permission to access or execute.

Important: To perform ALL the functions described in this chapter, you must log in to the Profiler as the Root User.

This chapter covers the following topics:

- ⇒ [Introduction to User Profiles and Permissions](#)
- ⇒ [Adding, Modifying, and Deleting Users and Groups](#)
- ⇒ [Configuring the User Information Tab](#)
- ⇒ [Configuring User Permissions](#)
- ⇒ [Configuring the Additional Information Tab](#)
- ⇒ [Configuring the Authorization Tab](#)
- ⇒ [Working with User Templates](#)

19.1 Introduction to User Profiles and Permissions

A user profile stores information about a person or group of people allowed to use the Virtua System. A user profiler consists of the following components:

- **User Information** - Identifying information, such as the username and password, which authenticates the user in the system. When you log in to the Virtua client, the Virtua Profiler, or InfoStation, Virtua asks for a username and password, which the systems use to determine which permissions are applicable to the user.
- **Permissions** - Settings that determine which functions are available to individual users or groups of users. Permissions can be assigned in two ways:

- ◆ **Individual Profiling** - Lets your library set permissions for *individual* users who may be granted, for example, permission to create and edit profiles for other users.
- ◆ **Group Profiling** - Lets your library assign user permissions across a *group* of users. Your library can specify the permissions granted to each user group. As you create individual users, they are assigned to a primary group and automatically inherit the permissions from that group.
- **Additional Information** - Additional information about the user, including e-mail address, telephone number, and the address of the user's institution.
- **Authorization Information** - Settings that determine which modules of the software the user is authorized to access, and also allow you to specify session limits for the user and limits on the number of interactions the user may have with the software.

User profiles appear in the Virtua Profiler on the Global Settings tab under the User Profiles heading (*Figure 19-1*).

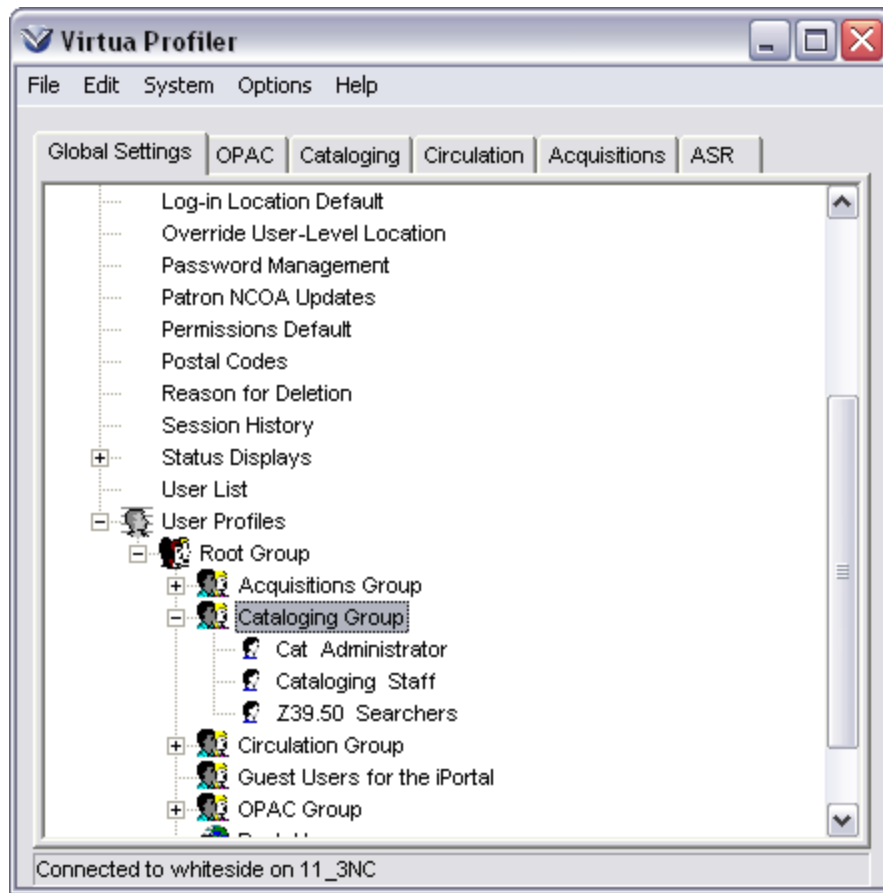




Figure 19-1. User Profiles Parameter Expanded

Via the User Profiles parameter, you can manage profiles for individual users and for groups of users. Within the Virtua Profiler tree . . .

- Group profiles are denoted with a group icon .
- Individual profiles are denoted with a user icon .

You can double-click any user or group to access the corresponding profile.

19.1.1 About Default User Profiles

Virtua offers a set of default user groups, each with its own default user profile(s). These default users and groups are listed in the following table:

Note: By default, when your library imports a new permissions file ([Import New Permissions feature](#)), Virtua enables the appearance and use of ALL new features for ALL groups, whether user-defined or system-defined (although you can change this behavior via the [Permissions Default parameter](#)).

Default Group	Default User	Default Username	Default Password
Root Group	Root User	root	root
Acquisitions Group	Acqs Administrator	acqadmin	acqadmin
Cataloging Group	Cat Administrator	catadmin	catadmin
Circulation Group	Circ Administrator	circadmin	circadmin
OPAC Group	OPAC Administrator	opacadmin	opacadmin
	Guest User	guest	guest
	Staff User	staff	staff
VSC Group	VSC Administrator	vscadmin	vscadmin

Important: To prevent unauthorized access to your system, you will want to change the password for each default user profile. For all users *except* the Root User, you can change the password via the Modify User window (see the section “[Modifying User Profiles](#)”). For details on changing the password for the Root User, see the *Virtua Installation User’s Guide*.

19.1.1.1 About the Root Group and Root User

The Root Group represents the highest level in the User Profiles hierarchy. All users and groups are members of the Root Group. You can add groups directly to the Root Group, and you can add users to groups within the Root Group, but you cannot add users directly under the Root Group.

You cannot delete the Root Group or modify its permissions.

The default member of the Root Group is the Root User. You cannot delete the Root User profile or modify its permissions. The *only* configurable element of the Root User profile is the password. For details on changing the Root User password, see the *Virtua Installation User's Guide*.

Only members of the Root Group can add groups to the Root Group. Therefore, when only the default user profiles exist, you can add users and groups *only* when you log in to the Profiler as the Root User. You can modify the profile and permissions for members of the Root Group as needed.

Important: Never create a group that has the word *root* in the name.

Throughout this chapter, it is assumed that you are logged in to the Profiler as the Root User and therefore have permission to add, modify, and delete users and groups of users.

19.1.1.2 About Group “Administrators”

By default, five subgroups belong to the Root Group: Acquisitions Group, Cataloging Group, Circulation Group, OPAC Group, and VSC Group. Each of these groups contains a default group administrator.

Each group administrator has permissions appropriate for the particular subsystem. In addition, the group administrators have permission to add, modify, and delete users and groups within their *primary* group (i.e., the group with which they are most *closely* associated). For example, the OPAC Administrator can add, modify, and delete users and groups within the OPAC Group.

Group administrators cannot add, modify, or delete users and groups *outside* of their primary groups. For example, the OPAC Administrator cannot add, modify, and delete users and groups within the Circulation Group. In addition, members of subgroups cannot add, modify, and delete members within the Root Group.

19.1.1.3 About the Guest User Profile

By default, the OPAC Group includes a Guest User profile. This profile allows users to log in to the Virtua client without authentication.

On the Virtua Access dialog box (*Figure 19-2*), if you select the Guest radio button and click the OK button, you log in to the Virtua client as Guest User.



Figure 19-2. *Virtua Access Dialog Box*

The Guest User profile is a *required* system profile. You cannot delete the Guest User profile. When you highlight the Guest User heading on the Profiler main window and click the right mouse button, the Delete option is disabled on the pop-up menu. For details, see the section “[Using the Pop-up Menu](#)” in this chapter.

The username of the Guest User profile must be exactly **guest**. In addition, the profile name must be **Guest User**. Therefore, when you access the Modify User window for the Guest User profile, the Username and Full Name fields are grayed out.

Although you cannot delete this user profile, you can modify its permissions. By following the instructions in the section “[Configuring User Permissions](#),” you can enable or disable most Virtua features for the Guest User. If you want to disable the Guest User, you can disable all permissions for the Guest User profile. Disabling all permissions for a user removes all buttons and menu items, leaving a blank window in the Virtua client.

Note that certain permissions are hard coded and are automatically denied to the Guest User regardless of the settings in the Guest User profile. These include:

- **Use of function keys** - In the Virtua client, the Guest User can use only three function keys: F1 (What’s This? Help), F9 (Title Browse Search), and F12 (Keyword Search). The Guest User cannot access the functions associated with other function keys, either via menu items or via the function keys themselves.
- **Ability to view and edit MARC data** - The MARC tabs of the View Record and View Holdings Record windows are not displayed to the Guest User. In addition, the Edit and the Add Item buttons on these windows are disabled.

19.1.1.4 About the Staff User Profile

By default, the OPAC Group also contains the Staff User profile. The staff user has access to all the resources for the Acquisitions, Cataloging, Circulation, and Serials groups. Like other user profiles, the Staff user profile is fully configurable. The staff user can be granted or denied permission to access any feature in the Virtua client and Virtua Profiler.

19.1.2 Understanding the Concept of Inheritance

When you add a new user to the system, the user inherits the permissions of their *primary* group, i.e., the group to which the user is directly added. (In other words, although Virtua allows for nesting groups, users will inherit permissions only from the group to which they are directly associated. Users will not inherit permissions from a group that is, say, one level up from their assigned group.) The rules of inheritance establish group permissions as a common starting point for each user added to the group. You can then modify the individual permissions as needed.

For example, if you add a new user to the OPAC Group, the new user inherits the permissions assigned to the OPAC Group. In this way, the OPAC Group permissions serve as default permissions for all new OPAC users.

Note: Keep in mind that the permissions for a group—for example the OPAC group—may include permissions for any of the Virtua subsystems, not just the OPAC subsystem.

On the Permissions tab of the Add/Modify User window, inherited permissions are designated with a gray check box. For example, [Figure 19-3](#) displays the inherited permissions for the View Holdings Record window.

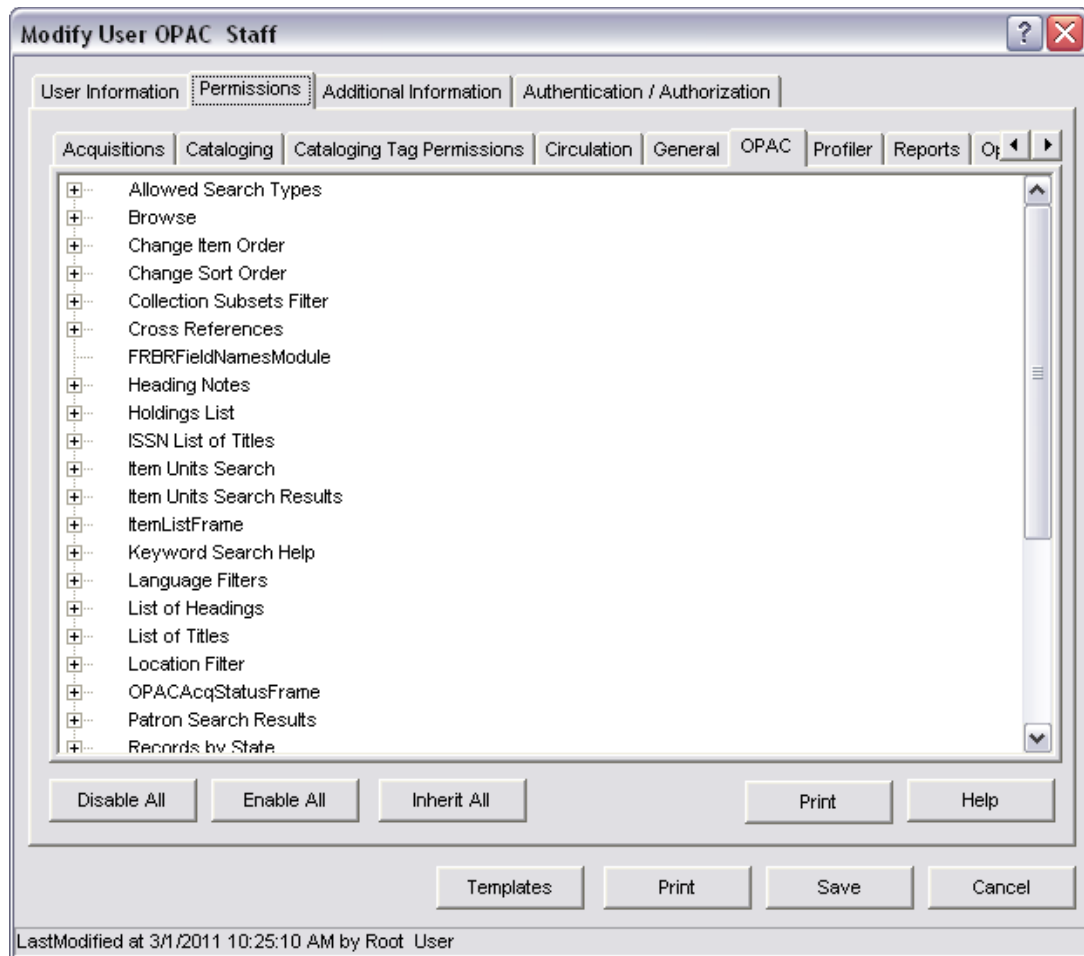


Figure 19-3. Modify User Window Displaying Inherited Permissions

Although group permissions serve as the starting point for each new user's permissions, you can choose whether an individual user's permissions are updated each time the group's permissions change.

Each permission setting on the Permissions tab of the Add/Modify User window is either . . .

- **Inherited (designated by a gray check box)** - always inherits its setting from the corresponding primary group permission setting. If you modify the group permission, then the corresponding user permission will be automatically inherited to match.
-OR-
- **Independent (designated by a clear check box)** - does NOT inherit its setting from the group permissions. This means that once you save the new user profile,

these independent permission settings are no longer affected by group permissions. If you modify the group permissions, independent permissions for the member users will not be affected.

Note: The Add/Modify User window can contain both inherited permissions and independent permissions. You can click a check box repeatedly to change the permission from inherited to independent.

When you add a new user to two or more groups, there may be a difference in the permission value assigned by each group for any given function. As long as any ONE group grants the permission (i.e., the permission is set to YES), the new user inherits the granted permission. For additional information on user and group permissions, see the section “[Configuring User Permissions](#)” in this chapter.

Hint: On the Add/Modify User window, you can click the Inherit All button, which causes the user to re-inherit the current group permissions for the selected tab.

19.2 Adding, Modifying, and Deleting Users and Groups

When you are logged in to the Virtua Profiler as a root user, you can use the User Profiles parameter to . . .

- Add user groups.
- Add individual users to groups.
- Modify group profiles.
- Modify individual profiles.
- Delete groups of users.
- Delete individual users.

The following sections provide details on performing these tasks. For details on setting specific permissions for each user or group of users, see the section “[Configuring User Permissions](#)” in this chapter.

19.2.1 Using the Pop-up Menu

The User Profiles parameter offers a pop-up menu, which you can use to manage your user profiles.

To access the pop-up menu,

1. On the Global Settings tab, expand the User Profiles parameter.
2. Highlight a user or group.
3. Click your right mouse button.

The pop-up menu appears (*Figure 19-4*).

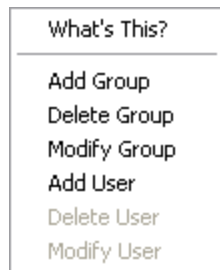


Figure 19-4. User Profiles Pop-up Menu

The pop-up menu offers the following options:

- **Add Group** - Displays the Add New Group window, where you can add a new user group.
- **Delete Group** - Deletes the selected user group.
- **Modify Group**- Displays the Modify Group window, where you can modify the settings for the selected group.
- **Add User** - Displays the Add New User window, where you can add a new user profile.
- **Delete User** - Deletes the selected user.

Note: The Delete User option inactivates the selected user and removes the user from your Profiler display. However, the deleted user profile remains stored in the database.

- **Modify User** - Displays the Modify User window, where you can modify the settings for the selected user.

19.2.2 Working with User Groups

The following sections describe how you can . . .

- Add new user groups.
- Modify profiles for existing user groups.
- Delete groups of users.

For details on setting permissions for user groups, see the section “[Configuring User Permissions](#)” in this chapter.

19.2.2.1 Adding User Groups

Your library can add any number of users and user groups to your system. Each user must belong to at least one group.

Important: Never create a group that has the word *root* in the name.

To add a new group of users,

1. On the Global Settings tab, expand the User Profiles parameter.
2. Highlight the group under which you want to add a new group.
3. Right click and choose Add Group.

The Add New Group window appears ([Figure 19-5](#)).

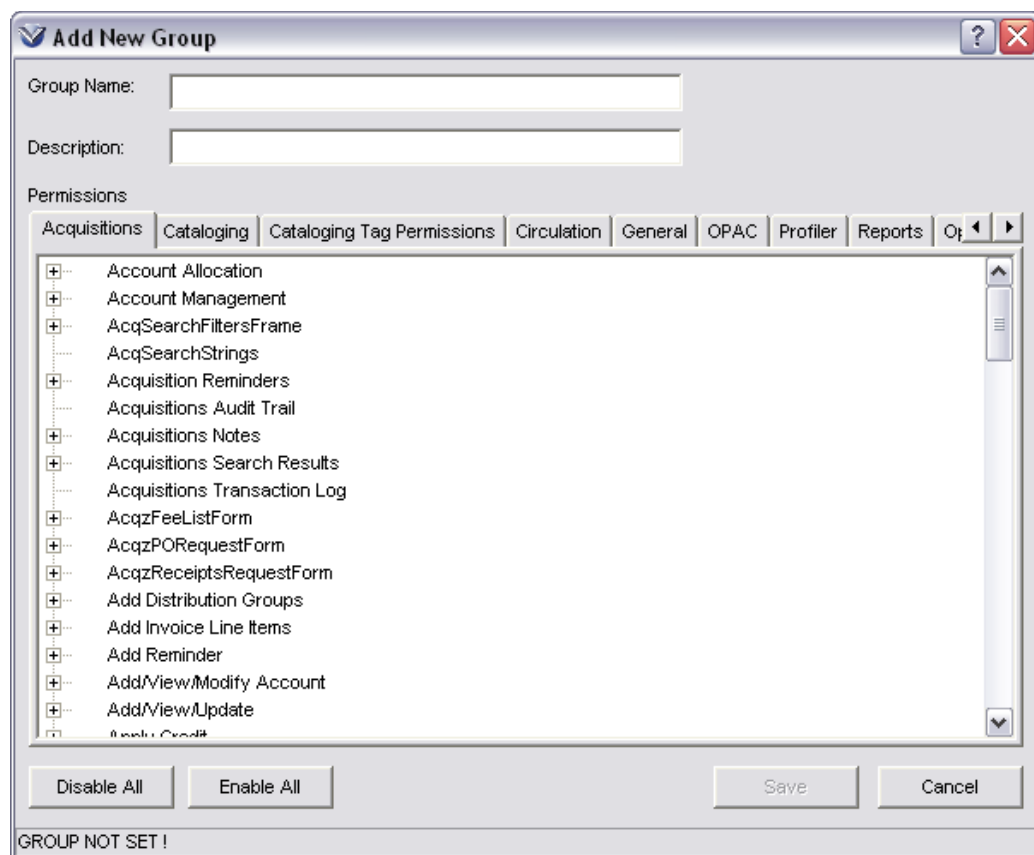


Figure 19-5. Add New Group Window

At the bottom of the window, the status bar displays GROUP NOT SET! until you save the group to the database.

4. In the Group Name text box, type a name for the new group.

Notes:

- Do NOT name a group “root” or use the word “root” in a Group Name. The Root group that comes with the Profiler should be the only group with the name “root” in the Group Name.
- It is recommended that you do NOT use the ‘&’ character in any Group Name.

5. In the Description text box, type a description of the new group.
6. Assign permissions to the group. For details, see the section “[Configuring User Permissions](#)” in this chapter.

7. Click the Save button.

The Add New Group window closes, and the new user group is saved to the database.

19.2.2.2 Modifying Group Profiles

To modify a group profile,

1. On the Global Settings tab, expand the User Profiles parameter until you locate the group you want to modify.
2. Double-click the group name.

The Modify Group window appears (*Figure 19-6*).

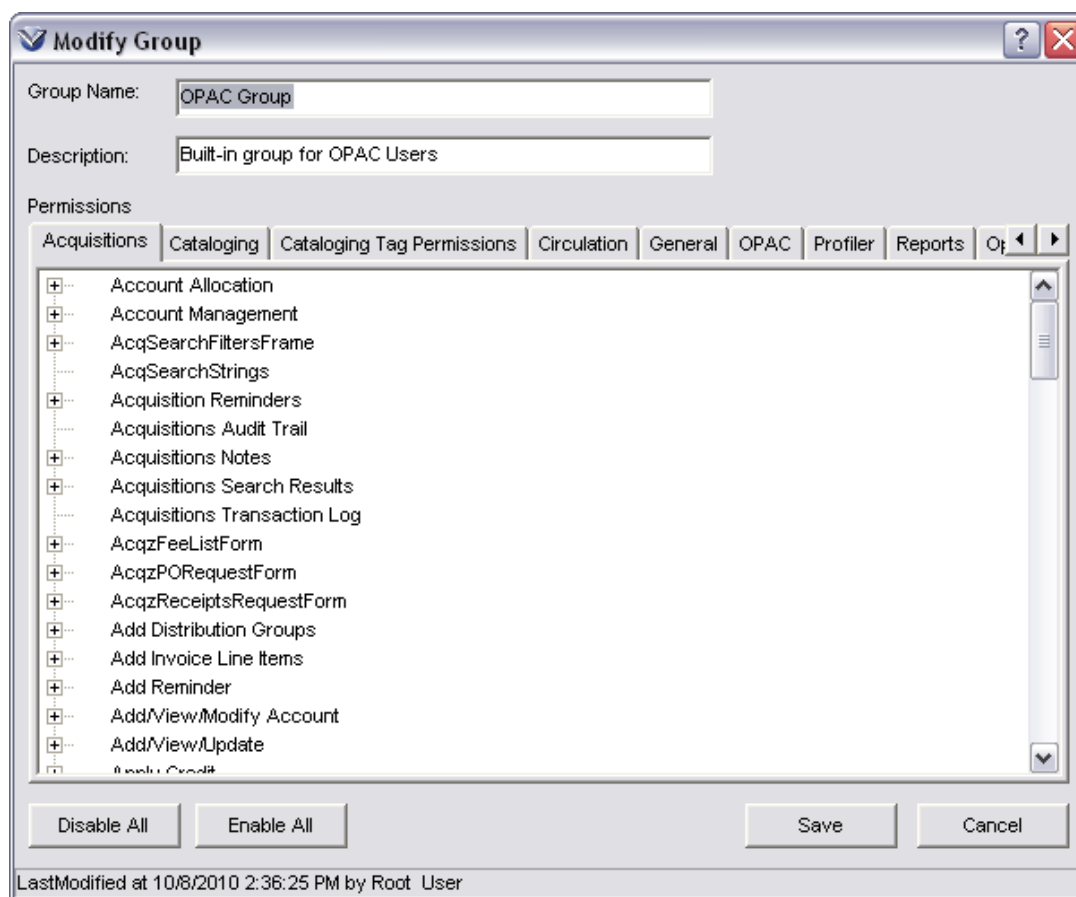


Figure 19-6. Modify Group Window

3. Modify the Group Name and Description as needed.
4. Modify the group permissions as needed. For details, see the section “[Configuring User Permissions](#)” in this chapter.

Note: When you modify the permissions for a particular group, the changes are automatically applied to the inherited permissions (designated by a gray check box) of all users or subgroups belonging to that group. A user’s or subgroup’s independent permissions (designated by a clear check box) are not affected by changes to the group’s permissions.

5. Click the Save button.

Your changes are saved to the database.

19.2.2.3 Deleting User Groups

You can delete any user group that does NOT have associated users or subgroups. Before you can delete a group that has users or subgroups, you must first delete each individual user and subgroup.

To delete a user group from the database,

1. On the Global Settings tab, expand the User Profiles parameter until you locate the group that you want to delete.
 2. Highlight the group name; click the right mouse button; and then choose Delete Group.
- If the group has user or subgroups associated with it, the following message appears (*Figure 19-7*), and the deletion is canceled when you click the OK button.

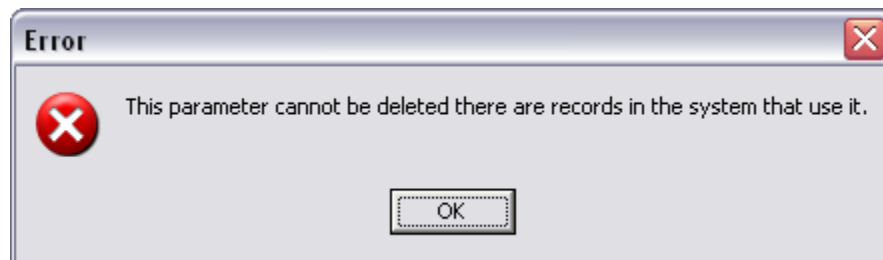


Figure 19-7. Error Message When Deleting Groups with Users or Subgroups

- Otherwise, the following confirmation message appears (*Figure 19-8*), and when you click the OK button, Virtua deletes the group from the database.

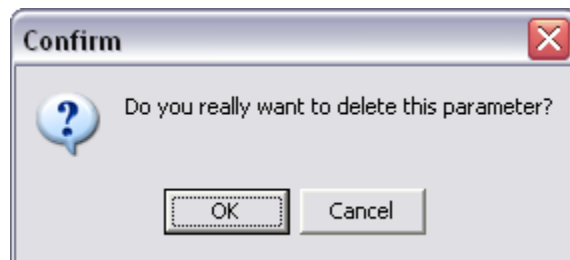


Figure 19-8. Delete Group Confirmation Message

19.2.3 Working with Individual Users

The following sections describe how you can . . .

- Add individual user profiles.
- Modify individual user profiles.
- Delete user profiles.
- Move a user profile from one primary group to another.

The following sections provide details on performing these tasks.

19.2.3.1 Adding Individual User Profiles

To add a new user profile,

1. On the Global Settings tab, expand the User Profiles parameter until you locate the group to which you want to add the new user.

Note: You can add new users to any user group, but you cannot add new users directly to the Root Group. Each user *must* belong to a primary group, from which the user will inherit default user permissions.

2. Right click and choose Add User.

The Add New User window appears ([Figure 19-9](#)).

Figure 19-9. Add New User Window

At the bottom of the Add New User window, the status bar displays USER NOT SET! until you save the user profile to the database.

3. Configure the settings on the User Information tab. For details, see the section [“Configuring the User Information Tab”](#) in this chapter.
4. Configure the permission settings on the User Permissions tab. For details, see the section [“Configuring User Permissions”](#) in this chapter.
5. Configure the settings on the Additional Information tab. For details, see the section [“Configuring the Additional Information Tab”](#) in this chapter.
6. Configure the settings on the Authentication/Authorization tab. For details, see the section [“Configuring the Authentication/Authorization Tab”](#) in this chapter.

- When you are finished configuring the user profile and permissions, click the Save button.

The new user profile is saved to the database.

19.2.3.2 Modifying User Profiles

To modify an existing user profile,

- On the Global Settings tab, expand the User Profiles parameter until you locate the user you want to modify.
- Double-click the user name.

The Modify User window appears (*Figure 19-10*).

Figure 19-10. Modify User Window

3. Modify the settings on the User Information tab as needed. For details, see the section “[Configuring the User Information Tab](#)” in this chapter.
4. Modify the permission settings on the User Permissions tab as needed. For details, see the section “[Configuring User Permissions](#)” in this chapter.
5. Modify the settings on the Additional Information tab as needed. For details, see the section “[Configuring the Additional Information Tab](#)” in this chapter.
6. Modify the settings on the Authorization tab as needed. For details, see the section “[Configuring the Authorization Tab](#)” in this chapter.
7. When you are finished modifying the user profile, click the Save button.

Your changes are saved to the database.

Note that (non-root) users are prevented from modifying their own profiles.

19.2.3.3 Deleting User Profiles

To delete a user from the database,

1. On the Global Settings tab, expand the User Profiles parameter until you locate the user that you want to delete.
2. Highlight the user name; click the right mouse button; and then choose Delete User.

Virtua displays a confirmation message, verifying that you want to delete the user ([Figure 19-11](#)).

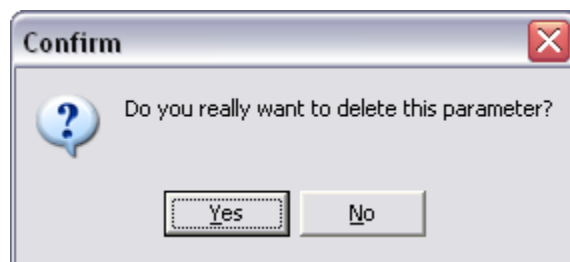


Figure 19-11. Confirmation Message (Displayed Upon Deleting User)

3. Click the Yes button to delete the user from the database.

The user is deleted from the database.

Note that (non-root) users are prevented from deleting their own profiles.

19.2.3.4 Moving a User Profile to a Different Primary Group

To move an existing user profile to a different primary group,

1. On the Global Settings tab, expand the User Profiles parameter until you locate the user whose primary group you want to change.
2. Highlight the user name; click the right mouse button; and then choose Modify User.

The Modify User window appears (*Figure 19-12*).

Figure 19-12. Modify User Window

3. In the Member Groups area, click to highlight the group *to which* you want to move the user profile.
4. Click the Set Primary button.

PRIMARY appears next to the new group, indicating the user has been successfully moved to a new primary group.

5. Click the Save button to save your changes.

Note: If multiple member groups are highlighted, the *last* member group you highlighted will be set as the primary group when you click the Set Primary button. If ALL member groups are already highlighted, to change the primary group, click to un-highlight the desired member group, and then click again to re-highlight that group before clicking the Set Primary button.

19.3 Configuring the User Information Tab

On the Add/Modify User window, the User Information tab ([Figure 19-13](#)) lets you enter user-specific information, library locations from which the user can log in, and member groups.

Add New User

User Information | Permissions | Additional Information | Authentication / Authorization

Username: Prefix:

First Name: Last Name:

Description:

Log-in Locations: DEFAULT

Member Groups:

Templates Print Save Cancel

USER NOT SET!

Figure 19-13. User Information Tab of the Add/Modify User Window

To configure the settings on the User Information tab,

1. In the Username text box, type a username for the new user. This is the name that the user will use when logging in to the Virtua client, Profiler, or InfoStation®. The username is alphanumeric and case-sensitive.
2. In the Prefix text box, type a prefix that applies to the user's name (i.e., Ms., Mr., Dr., etc.).
3. In the First Name text box, type the user's first name.
4. In the Last Name text box, type the user's last name.
5. In the Description text box, type a brief description for the user profile.
6. In the Log-in Locations list box, select the locations that you want to allow this user to log in to in the Virtua client. Both main locations and sublocations appear in the list.
 - To select all locations, click the Select All button.
 - To select a single location, click that location with your mouse.
 - To de-select ALL locations, click the Clear All button.

Note: The locations that you select here determine which locations are available when the user accesses the Choose Location icon in the Virtua client (see also the [Log-in Location Default](#) parameter).

7. Set the user's default log-in location. To do so, highlight the desired default log-in location, and then click the Set Default button. By default, the first location in the list is designated the DEFAULT log-in location.
8. In the Member Groups list box, select the user groups in which you want this user to be a member. The user is a member of any highlighted group. You can select and de-select groups by clicking them with your mouse.

Note: By default, the user's primary group is highlighted and labeled PRIMARY in the Member Groups list box. The primary group is the user group under which you added this user in the Virtua Profiler tree. You cannot de-select the primary group.

9. Using the drop-down list box labeled *Type of access for primary group*, choose the type of access you want this user to have regarding the other user profiles in the primary group. The choices are . . .

- **None** - The user cannot view, modify, create, or delete other user profiles.
 - **Read** - The user can view other user profiles but cannot modify or delete them.
 - **Change** - The user can view and modify the other user profiles but cannot delete them.
 - **Create/Delete** - The user can view, modify, create, and delete user profiles.
10. When you are finished configuring the settings on the User Information tab, click one of the other tabs on the Add New User window to continue configuring the user profile. See the sections “[Configuring User Permissions](#),” “[Configuring the Additional Information Tab](#),” and “[Configuring the Authorization Tab](#)” in this user’s guide.

For information about the Templates button, see the section “[Working with User Templates](#).”

19.4 Configuring User Permissions

Via the User Profiles parameter, you can set permissions for individual users and groups of users that are part of your system.

Important: There are some permissions in the Profiler that correspond to features only available to select users. The entries for these permissions are marked accordingly in the Permissions Help document. Likewise, some permission settings do not have any effect on the Virtua interface, and these are ignored by the Permissions help. If you have any questions about specific permissions not addressed by the Permissions help, contact Innovative Customer Support.

19.4.1 Accessing User Permissions

You can set permissions for a *group* of users in the Permissions area of the Add/Modify Group window ([Figure 19-14](#)). For details on accessing the Add/Modify Group window, see the section “[Working with User Groups](#)” in this chapter.

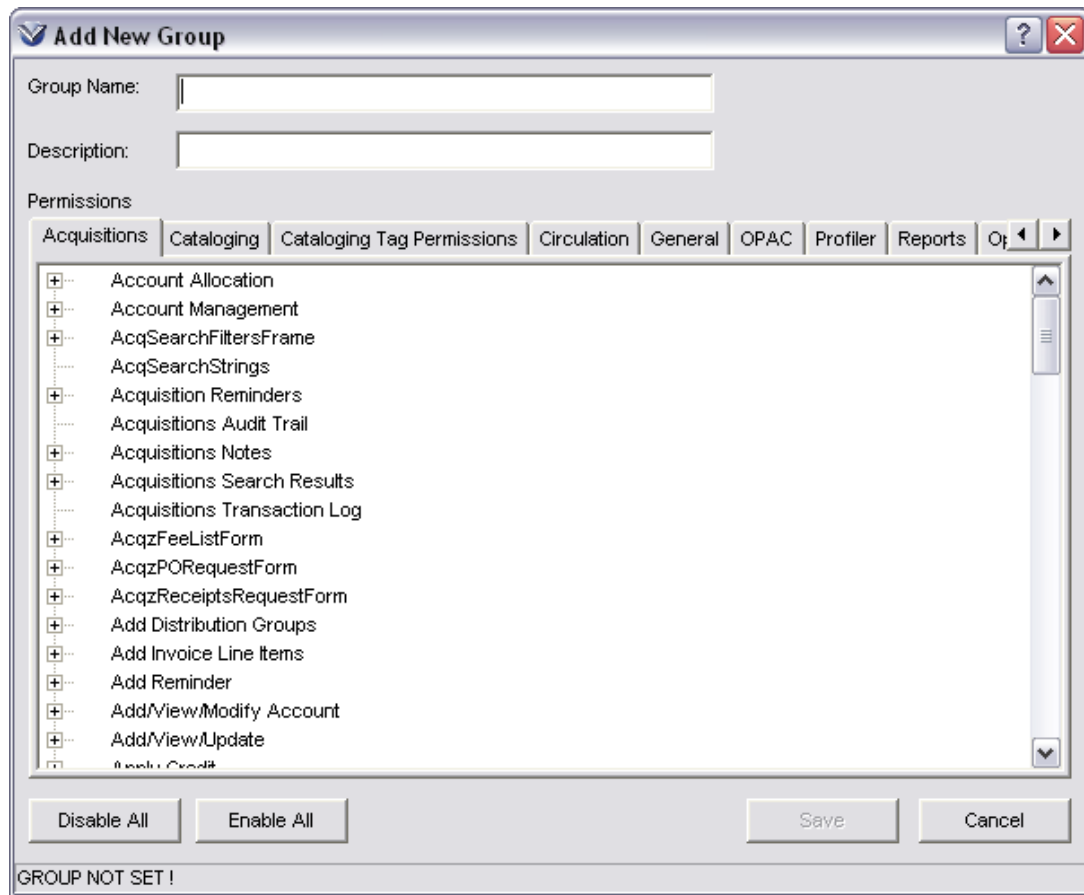


Figure 19-14. Add/Modify Group Window

You can set permissions for an individual user on the Permissions tab of the Add/Modify User window (Figure 19-15). For details on accessing the Add/Modify User window, see the section “[Working with Individual Users](#)” in this chapter.

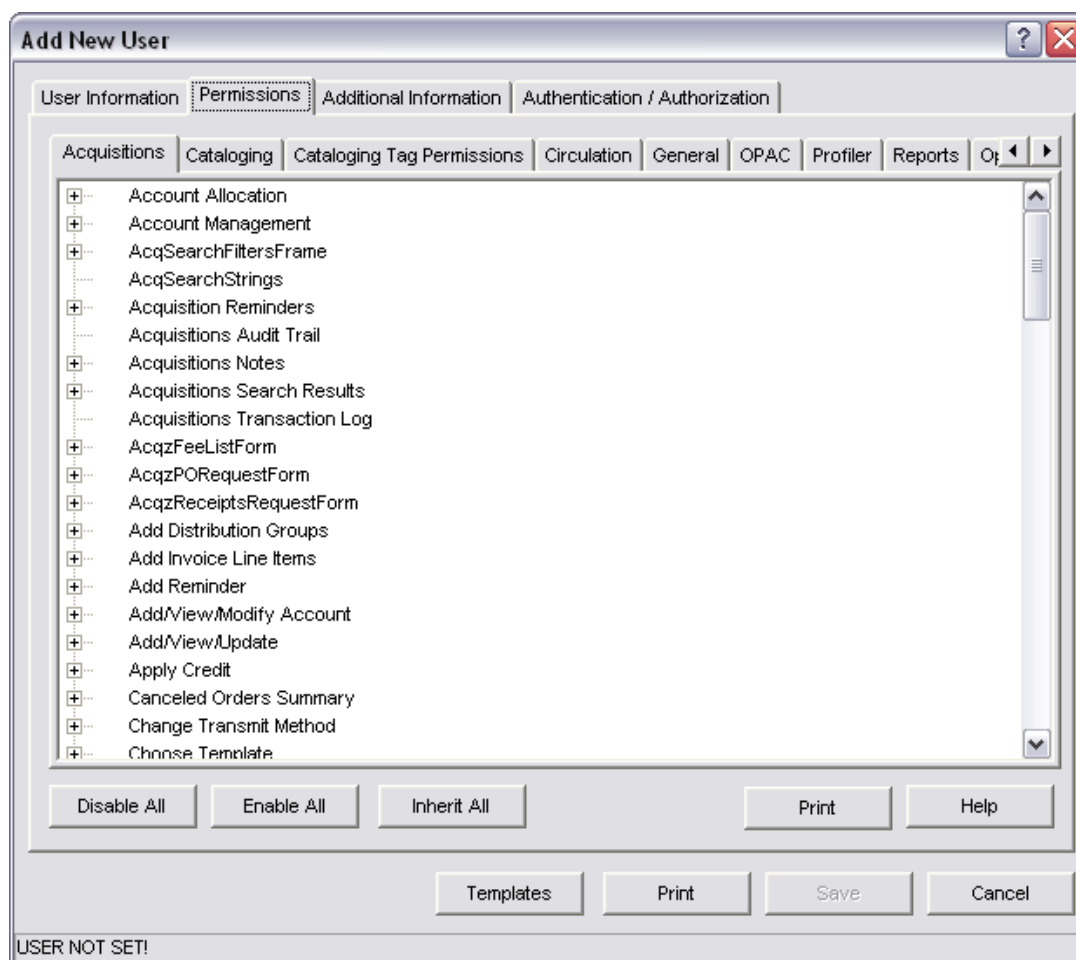


Figure 19-15. Permissions Tab of the Add/Modify User Window

Notice that the Permissions tab of the Add/Modify User window contains the same permissions data as the Add/Modify Group window. For simplicity, the following sections use the Permissions tab of the Add/Modify User window in the examples. In general, you can use the same guidelines for setting group permissions as you use for setting user permissions. note exceptions where appropriate.

The sections below outline the different types of user permissions and describe how they are organized on the tabs of the Add/Modify User or Add/Modify Group window.

19.4.2 Printing User Permissions

You can print all the user permission settings via the Print button on the Permissions tab. The printout will contain more than 40 pages. The brief excerpt below shows the formatting convention used in the printout:

Cataloging Options

Save To File Validation Option

[!] Change Save To File Validation Option

[!] Save To File Validation Option is ON

Save To Database Validation Option

[Y!] Change Save To Database Validation Option

[Y!] Save To Database Validation Option is ON

Use Bib Rule File Validation Option

[] Change Bib Rule File Validation Option

[] Use Bib Rule File Validation Option is ON

Edit Fixed Fields Option

[Y] Change Edit Fixed Fields Option

[Y] Edit Fixed Fields Option is ON

...where

[!] means “denied explicitly for this user” (i.e., empty/white check box).

[Y!] means “granted explicitly for this user” (i.e., checked/white check box).

[] means “denied by group inheritance” (i.e., empty/gray check box).

[Y] means “granted by group inheritance” (i.e., checked/gray check box).

19.4.3 Working with “Access” Permissions

Each function that is available in the Virtua client (e.g., Search, Check In, Check Out) has various points of access. For example, the Check Out function is accessible from the Circulation drop-down menu, the Item Information menus, the Patron Information menus, and the Circulation toolbar.

In the Virtua Profiler, each of these access points has a corresponding user permission. In this way, you can control a user’s ability to perform various functions by granting or denying the user permission to see various elements of the Virtua client interface (e.g., buttons, menu items, and toolbars). For example, to deny a user permission to perform check-outs, you might deny the user permission to see the Check Out menu item on the Circulation drop-down menu, the Item Information menus, the Patron Information menus, and the Circulation toolbar.

Access permissions appear on the Acquisitions, Cataloging, Circulation, General, OPAC, and Profiler tabs of the Permissions tab of the Add/Modify User window. Permissions are arranged on these tabs in a tree structure similar to that which appears

on the Virtua Profiler main window. You can use the plus (+) and minus (-) signs to expand and collapse the tree ([Figure 19-16](#)).

Note: Other tabs on the Permissions tab are Cataloging Tag Permissions, Reports, Operational Security, and State Permissions. These tabs offer permissions on a broader scale than just access and involve permissions for editing, saving, and executing. For details, see the section in this chapter that deals specifically with the tab in question.

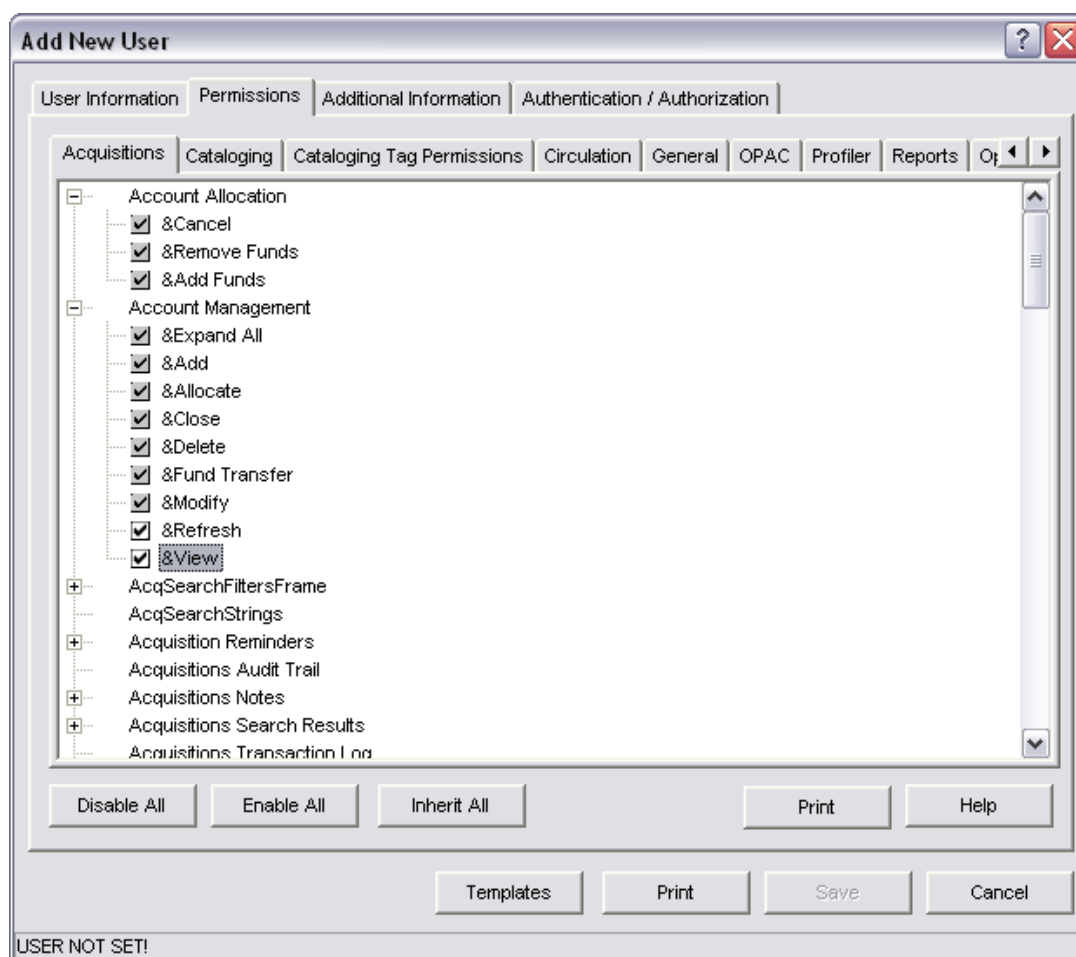


Figure 19-16. Permissions Tab of the Add/Modify User Window - Tree Expanded

Each access permission has a corresponding check box, the setting of which determines whether the user can see the corresponding feature in the Virtua client.

Note: Headings in the tree that do not have check boxes (e.g., Account Allocation in [Figure 19-16](#)) are NOT access permissions. For additional information, see the section “[Setting Permissions for Entire Windows and Tabs](#)” in this chapter.

On the Permissions tab of the Add/Modify User window, each access permission can have one of three types of settings:

- **Gray and Checked OR Unchecked** - Designates the inherited setting, either allowed (checked) or NOT allowed (unchecked). The gray check boxes let you see at a glance, which permissions are inherited and which permissions are specific to the user.

Note: Permissions are inherited from the user’s member group(s) when the user is first created and can be modified as needed. If you click the Inherit All button, the user re-inherits all group permissions for the current tab. Notice that when you click the Inherit All button, all check boxes become gray, indicating the inherited settings for all permissions.

-OR-

- **Clear and Checked** - Indicates that the permission is NOT inherited, and that the user CAN access the feature (i.e., the corresponding feature appears for the user on the client interface).

-OR-

- **Clear and Unchecked** - Indicates that the permission is NOT inherited, and that the user CANNOT access the feature (i.e., the corresponding feature does NOT appear for the user on the client interface).

Hint: You can click each check box repeatedly to cycle through these settings.

On the Add/Modify Group window, each access permission has only two possible settings: checked or unchecked. Permission boxes are never gray on the Add/Modify Group window because user groups do NOT inherit permission settings.

19.4.3.1 Setting Access Permissions

To set access permissions,

1. On the Permissions tab of the Add/Modify User window or on the Add/Modify Group window, click the tab containing the permissions that you want to set.

2. Set the permissions as appropriate.

- If you want to set specific permissions, expand the tree, and select or de-select the permissions as appropriate.
- If you want to grant ALL permissions on the tab, click the Enable All button.
- If you want to deny ALL permissions on the tab, click the Disable All button.
- If you want a user to re-inherit ALL permissions on the tab, click the Inherit All button.

Note: This option is not available on the Add/Modify Group window.

3. Continue setting permissions on other tabs as needed.

4. When you are finished setting permissions, click the Save button.

The permissions are saved to the database.

19.4.3.2 Hints for Setting Access Permissions

When you set access permissions in the Virtua Profiler, you will want to keep some important rules and exceptions in mind. The following sections provide tips and hints that you can use for setting access permissions.

19.4.3.2.1 Finding Access Permissions in the Permissions Tree

Most access permissions are organized according to the subsystem with which you would normally associate the corresponding function. For example, you would find permissions for the Search window on the OPAC tab of the Permissions tab of the Add/Modify User window. On each tab, permissions are sorted alphabetically.

Most permissions are grouped under a heading that represents the window or menu on which the feature appears. For example, permissions associated with the Search window are organized on the OPAC tab under the heading Search. You can expand the Search heading to see the permissions for specific features of the Search window (*Figure 19-17*).

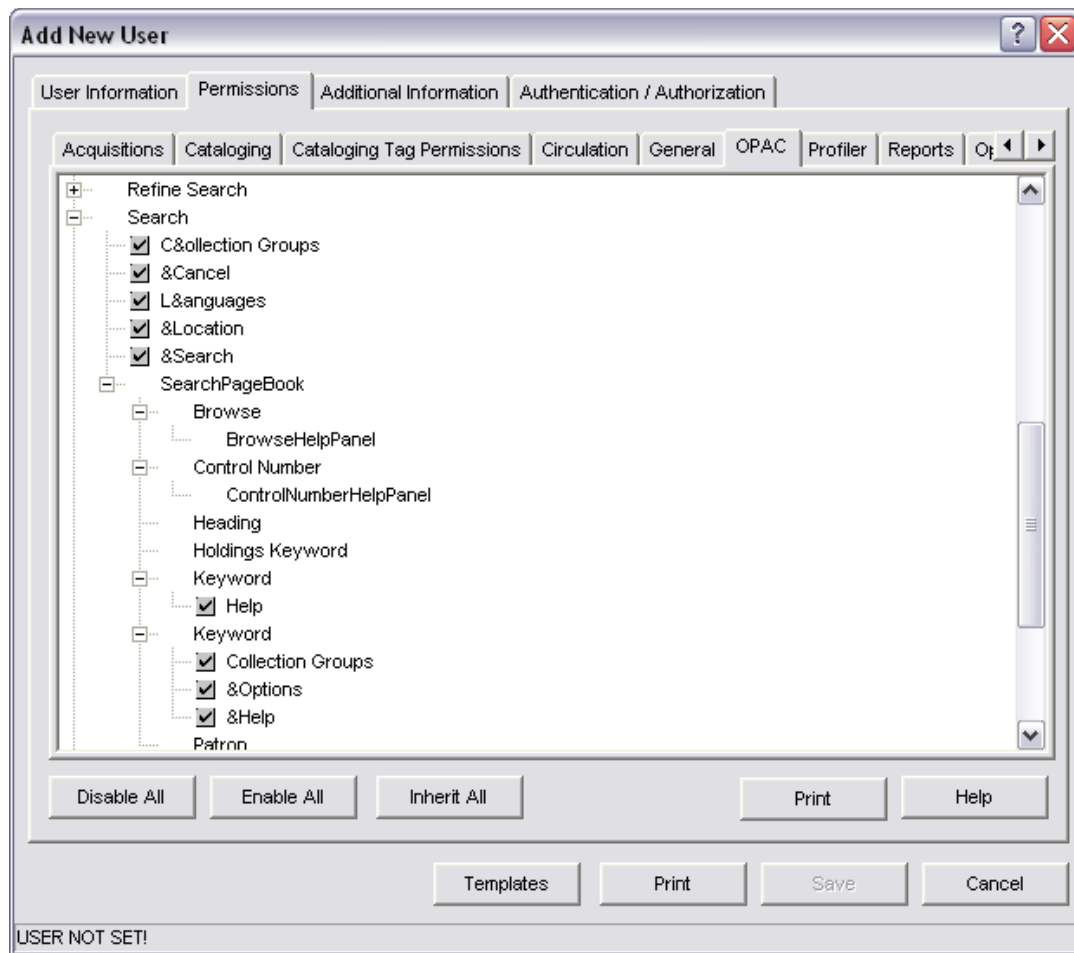


Figure 19-17. Permissions Tab - OPAC Tab: Search Window Permissions Expanded

Some permissions cannot be classified under one specific subsystem and instead appear on the General tab ([Figure 19-18](#)), which is essentially a catch-all category for permissions that cannot be specifically classified.

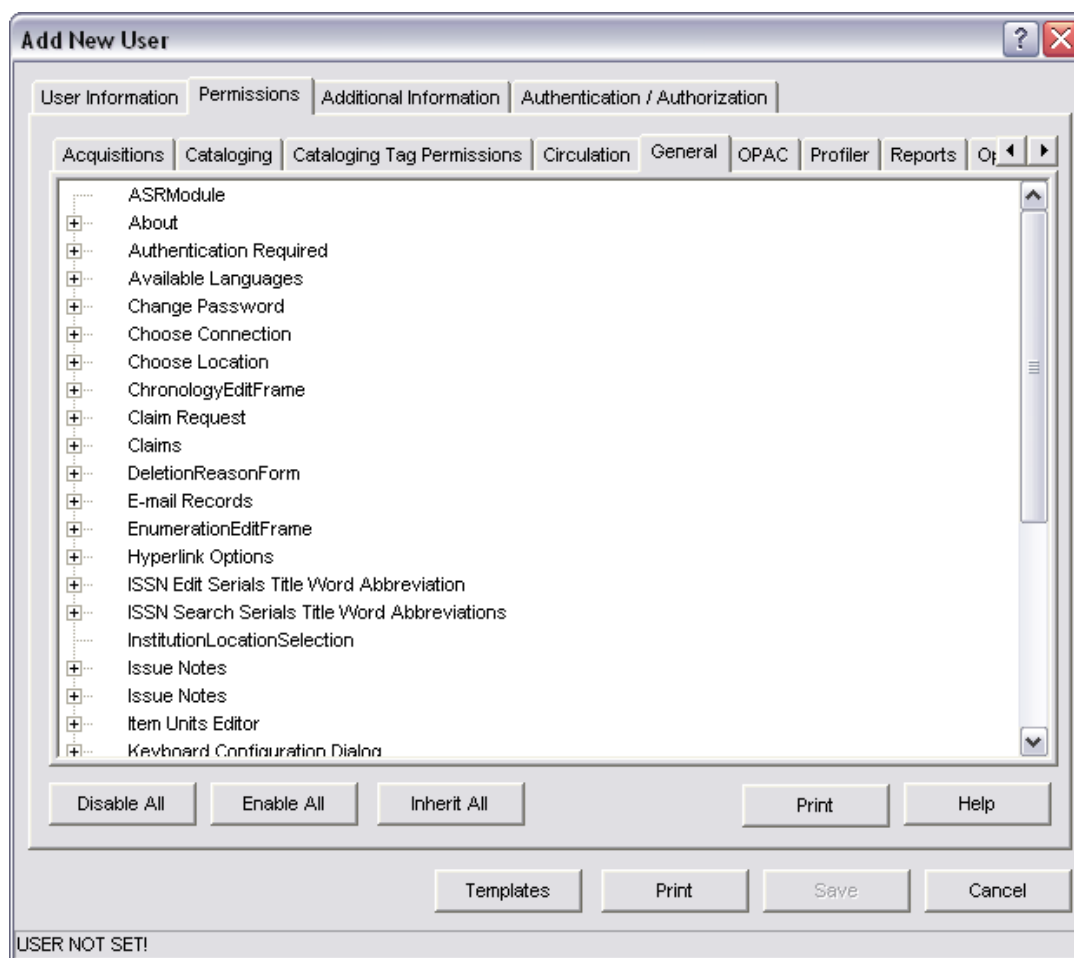


Figure 19-18. Permissions Tab - General Tab

The General permissions category contains permissions for . . .

- Menus and toolbars available on the Virtua main window.
- Patron routing features.
- Print and e-mail dialog boxes.
- Server connection features.

Because permissions for standard drop-down menus are organized on the General tab, one might assume that permissions for supplementary drop-down menus (i.e., drop-down menus that appear on the Virtua menu bar only when certain windows are active) also appear on the General tab. This, however, is not the case.

Permissions for supplementary drop-down menus are grouped with their corresponding window. For example, permissions for the View Record drop-down

menu, which appears when the View Record window is active, appear on the OPAC tab under the View Record heading.

19.4.3.2.2 Setting Permissions for Entire Windows and Tabs

It is not possible to set permissions for entire windows and tabs (i.e., you cannot deny a user permission to see an entire window or tab). On the Permissions tab of the Add/Modify User window and on the Add/Modify Group window, note the absence of check boxes next to aspects of the Virtua client interface for which you cannot grant or deny permissions. For example [Figure 19-19](#) shows the access permissions for the Check Out/Renew window.

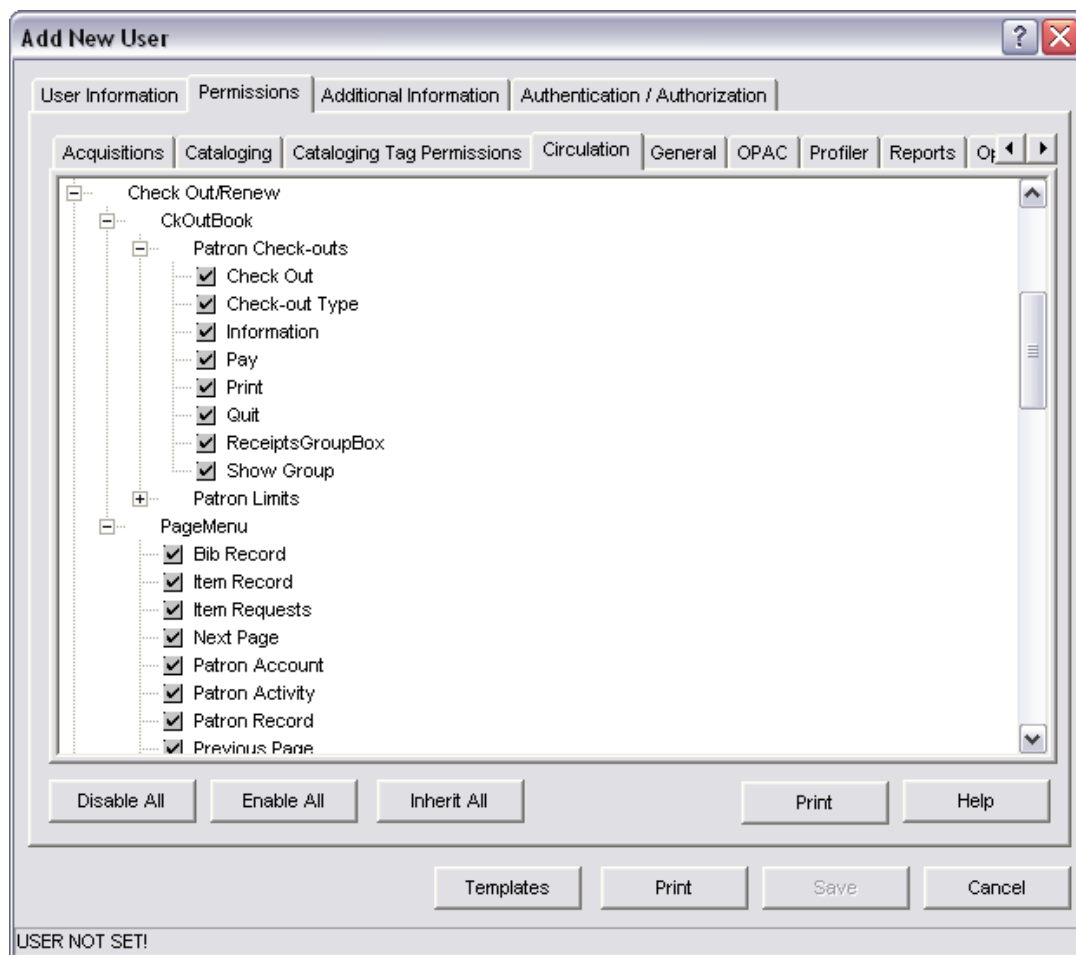


Figure 19-19. Access Permissions for the Check Out/Renew Window

In [Figure 19-19](#), note the absence of a check box next to the Check Out/Renew heading. This means that you cannot set user permissions for the entire Check Out/Renew window. You can set permissions only for specific features of the Check Out/Renew window, such as buttons and group boxes.

Any heading that does not have a corresponding check box represents a unit of the Virtua client interface for which permissions cannot be set.

Hint: You can deny the user access to a window by disabling ALL access points for the window. For an additional level of security, you can deny the user access to all aspects of that window. In this way, if the user does access the window (e.g., if you overlook one of the access points), when the window appears, it will be empty.

19.4.3.2.3 About Shortcut Keys and Keyboard Functions

Shortcut key combinations and keyboard function keys are not among the functions for which you can assign permissions.

Permissions for ALT+[letter] shortcut key combinations are controlled by the permission for their corresponding menu items. For example, if you deny a user permission to access the Title menu item on the Search menu, the user will also NOT be able to perform a Title browse search by pressing ALT+S+T.

Permissions for the CTRL+[letter] shortcut key combinations are NOT controlled by the permission for their corresponding menu item. For example, if you disable the Print function via menu items, users will be able to access the Print function by pressing the CTRL+P keys.

Note: Some shortcut key combinations are NOT available to the Guest User. For example, the Guest User cannot use the CTRL + C (Copy Heading) and CTRL + V (Merge Heading) OPAC shortcut key combinations. These permissions are hard coded and are automatically denied to the Guest User regardless of the settings in the Guest User profile.

Permissions for function keys are NOT controlled by the permission for their corresponding menu items. For example, if you deny a user permission to access the Title menu item on the Search menu, the user will be able to initiate a Title browse search by pressing the F9 key.

Note: The Guest User can use only three function keys: F1 (What's This? Help), F9 (Title Browse Search), and F12 (Keyword Search). The Guest User cannot access the functions associated with the other function keys, either via menu items or via the function keys themselves. These permissions are hard coded and are automatically denied to the Guest User regardless of the settings in the Guest User profile.

19.4.3.2.4 A Note about Multiple Access Points

When setting user permissions, keep in mind that most windows and functions have multiple points of access. For example, in the Virtua client, you can initiate a check-in from the . . .

- Check In menu item on the Circulation drop-down menu.
- Check In button on the Circulation toolbar.
- Check In button the Activity tab of the Patron Information window.
- Check In menu item on the Item Information right-click and pop-up menus.

To deny a user permission to check in items, you will want to disable ALL of these access points.

19.4.4 Setting Cataloging Tag Permissions

Using the settings available under the Cataloging Tag Permissions tab, permissions may be set for a user or group for editing specific tags in Authority, Bibliographic, Holdings, or Patron 2709 format records. Tag permissions set here apply to fixed fields and the special BI Profile 998 tag used by Library of Congress.

This window will be blank until you click the Add button (*Figure 19-20*).

Note: When configured for record type Patron, Cataloging Tag Permissions apply only to the MARC Editor and not to the Patron Editors.

I	Tag	Record Type	Disallow Add	Disallow Edit	Disallow Delete
	1xx	Bibliographic	<input type="radio"/>	<input checked="" type="radio"/>	<input checked="" type="radio"/>
✓	500	Bibliographic	<input checked="" type="radio"/>	<input checked="" type="radio"/>	<input checked="" type="radio"/>

Figure 19-20 - Cataloging Tag Permissions

When you click the Add button, a new entry will appear with the default values of a 1xx tag for a Bibliographic record type, with Disallow Add, Disallow Edit, and Disallow Delete all selected.

- By clicking on the value in the Tag field, you can edit this field to define a tag or range of tags, e.g. 1xx, 11x, or 110.
- You may click on the Record Type field to choose a Record Type from a drop-down list box; these include Bibliographic, Authority, Holdings, or Patron. You can hold down the CTRL key to select more than one type of record.
- There are then radio buttons to choose to Disallow Add, Disallow Edit, or Disallow Delete for the user or group. You may add as many permission rules as you wish.

A check mark in the I column indicates that a cataloging tag permission entry has been inherited from the group's permissions settings.

Note: Settings for a specific tag will override permissions for that range of tags. For example, if a user is not allowed to edit the 1xx range of tags, but the permissions allow the user to edit the 110 tag, then the user *will* be allowed to edit the 110 tag but will *not* be permitted to edit other 1xx tags. Settings for a user will override settings for that user's group.

Once you have completed choosing your settings, click the Save button.

19.4.5 Setting Search Category Permissions

Most of the permissions that appear on the OPAC tab are standard access permissions; they determine a user's ability to access specific windows, menu items, and controls in the OPAC subsystem. The Allowed Search Types permissions ([Figure 19-21](#)), however, are slightly different from other access permissions.

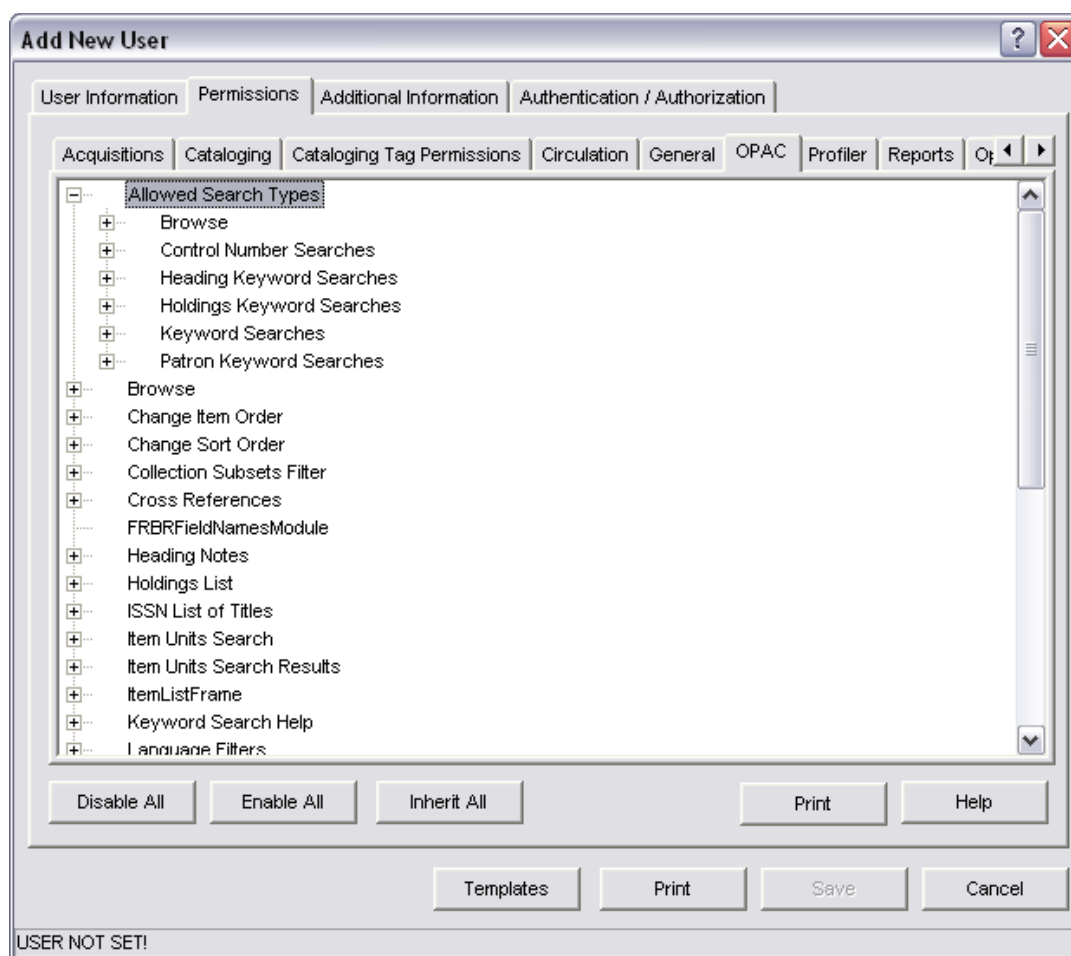


Figure 19-21. Allowed Search Types Permissions

Allowed Search Types permissions let you determine for each user the search categories that are available in the search category drop-down lists on the Browse, Heading, Keyword, and Control Number tabs of the Search window.

When you expand the Browse, Heading, Control Number, or Keyword heading, you see a list of all the categories that are available for that search type. For example, if you expand the Browse heading, [Figure 19-22](#) appears.

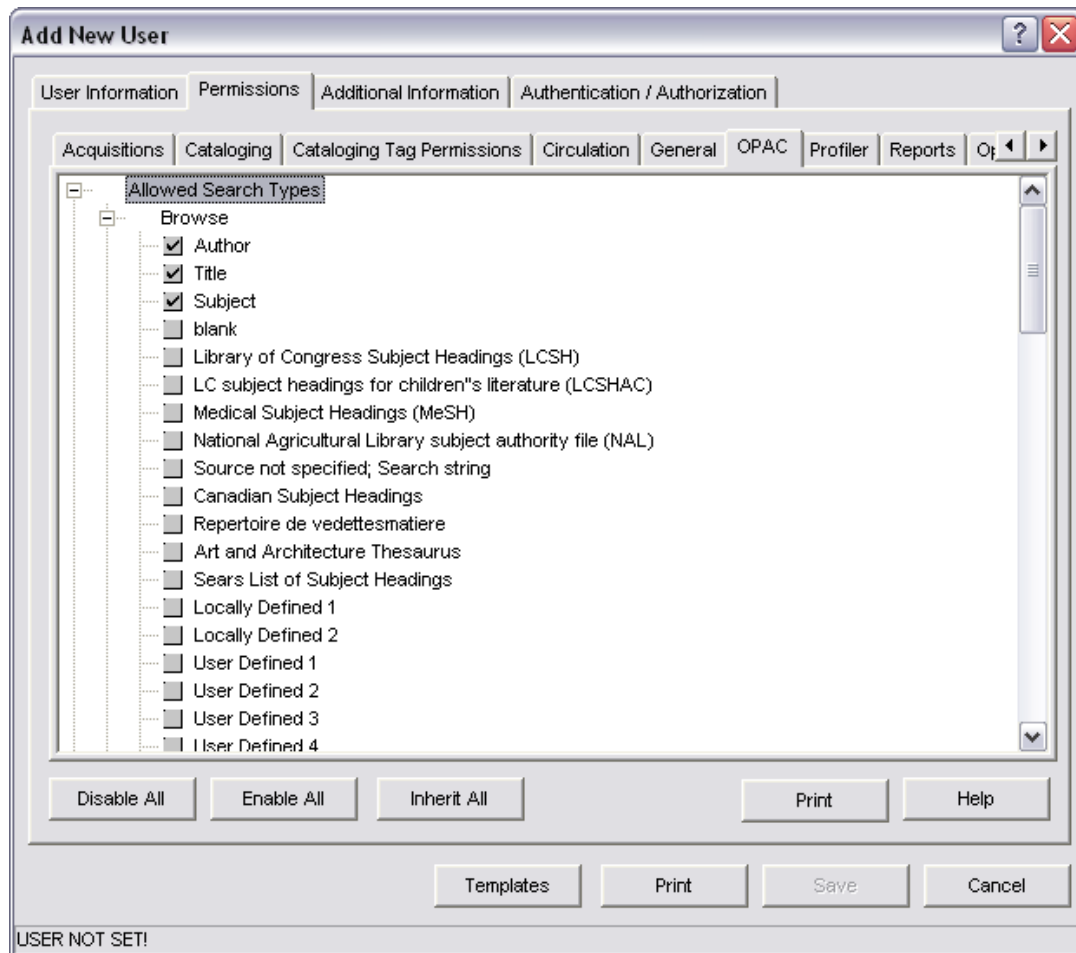


Figure 19-22. Browse Permissions Expanded

The list that appears in [Figure 19-22](#) matches the list of search categories that appears in the drop-down list on the Search window ([Figure 19-23](#)).

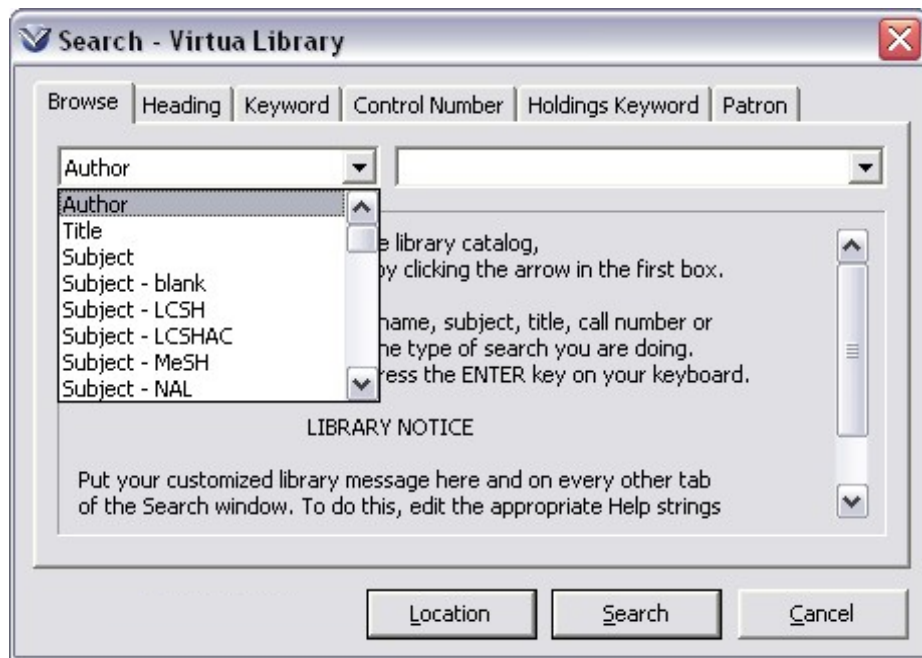


Figure 19-23. Virtua Client Search Window - Browse Tab - Search Categories Drop-down List

Similarly, the lists that appear under the Keyword and Control Number headings in the Virtua Profiler match the categories that appear in the drop-down lists on the Keyword and Control Number tabs of the Search window in the Virtua client.

You can set user permissions in the Profiler to determine which categories appear in the drop-down lists on the Search window. For example, if you de-select *Author* under the Browse heading in the Virtua Profiler, *Author* will NOT appear in the drop-down list on the Browse tab of the Search window in the client.

19.4.5.1 Setting Category Permissions for Browse Searches

To set category permissions for browse searches,

1. Access the Permissions tab of the Add/Modify User window for the appropriate user.
2. Click the OPAC tab.
3. Expand the Allowed Search Types heading.
4. Expand the Browse heading.

The list of available search categories appears ([Figure 19-24](#)).

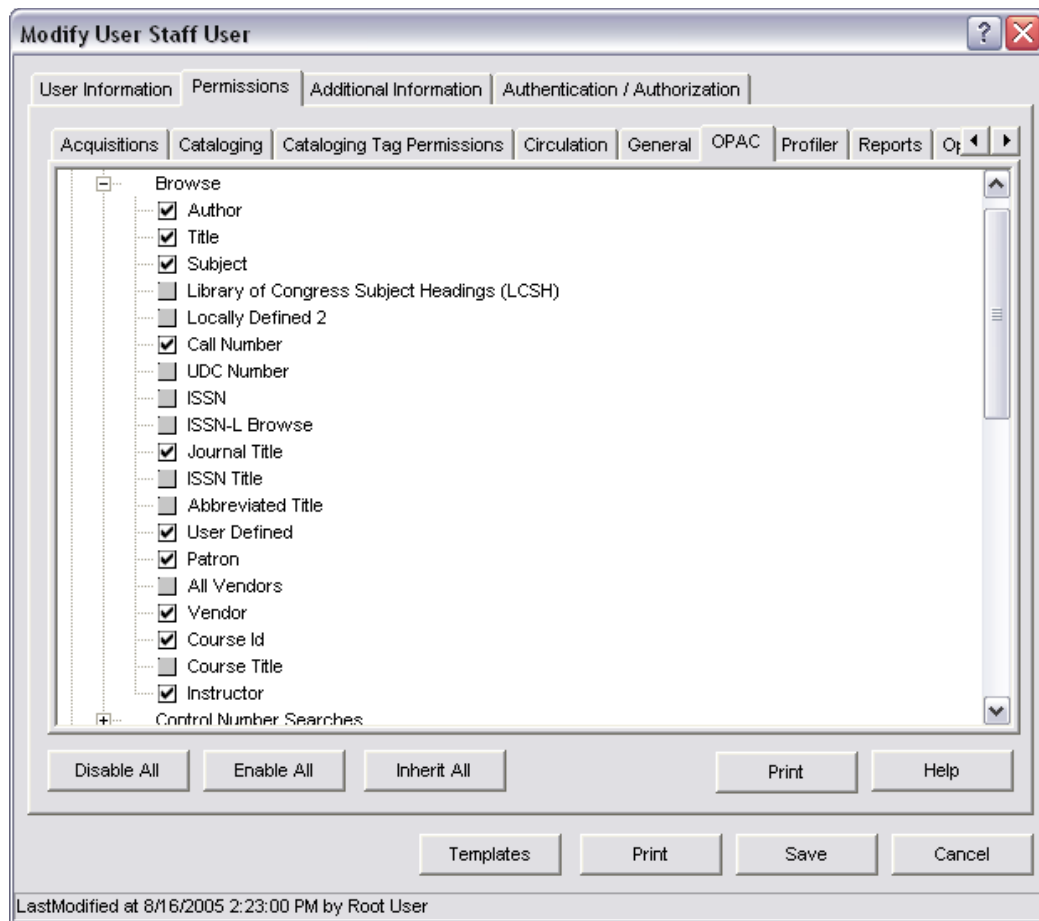


Figure 19-24. Virtua Profiler - Browse Search Permissions Expanded

When the Multiple Subject Headings parameter is not enabled, you will probably see a Browse search category permissions list that looks like [Figure 19-24](#), where Subject is the only type of subject category that is selected.

However, when the Multiple Subject Headings parameter is enabled, you might see a Browse search permissions list that looks like [Figure 19-25](#).

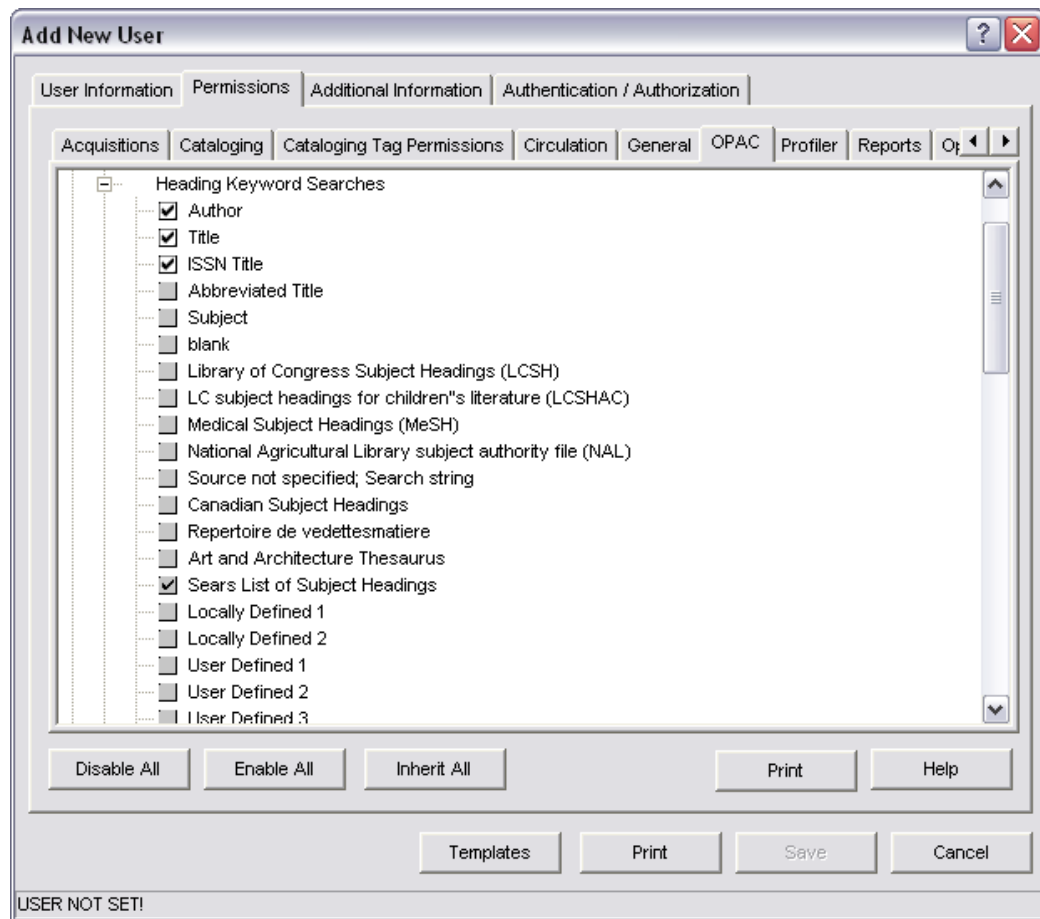


Figure 19-25. Virtua Profiler - Browse Search Permissions Expanded

5. Select the check box for each search category you want to appear in the drop-down list on the Browse tab of the Search window.

Note: Each user can search *only* on the categories that appear in the drop-down list on the Search window.

6. De-select the check box for each category you do NOT want to appear in the drop-down list on the Browse tab of the Search window.
7. Click the Save button.

The permissions are saved for this user. On the Search window in the client, only the categories that you selected for this user will appear in the drop-down list on the Browse tab.

Hint: When working with category permissions for browse searches . . .

- Unless the Multiple Subject Headings parameter is enabled, select Subject as the only subject search category. If you select, say, Library of Congress Subject Headings (LCSH), it will appear in the drop-down list on the Browse tab of the Search window, but choosing it for a browse search will never return any search results.
- The Locally Defined 1 and Locally Defined 2 permissions correspond to the locally-defined subject heading types configured in the Multiple Subject Headings parameter, located on the Cataloging tab of the Virtua Profiler.
- The User Defined 1 through User Defined 10 permissions correspond to the user-defined subject heading types configured in the Multiple Subject Headings parameter, located on the Cataloging tab of the Virtua Profiler. See the *Virtua Profiler/Cataloging Parameters User's Guide* for more information about this parameter.
- The User Defined permission corresponds to the library-defined search configured in the Tags Indexed for User Defined Search parameter, located on the Cataloging tab of the Virtua Profiler. See the *Virtua Profiler/Cataloging Parameters User's Guide* for more information about this parameter.

19.4.5.2 Setting Category Permissions for Heading Keyword Searches

To set category permissions for heading keyword searches,

1. Access the Permissions tab of the Add/Modify User window for the appropriate user.
2. Click the OPAC tab.
3. Expand the Allowed Search Types heading.
4. Expand the Heading Keyword Searches heading.

The list of available search categories appears ([Figure 19-26](#)).

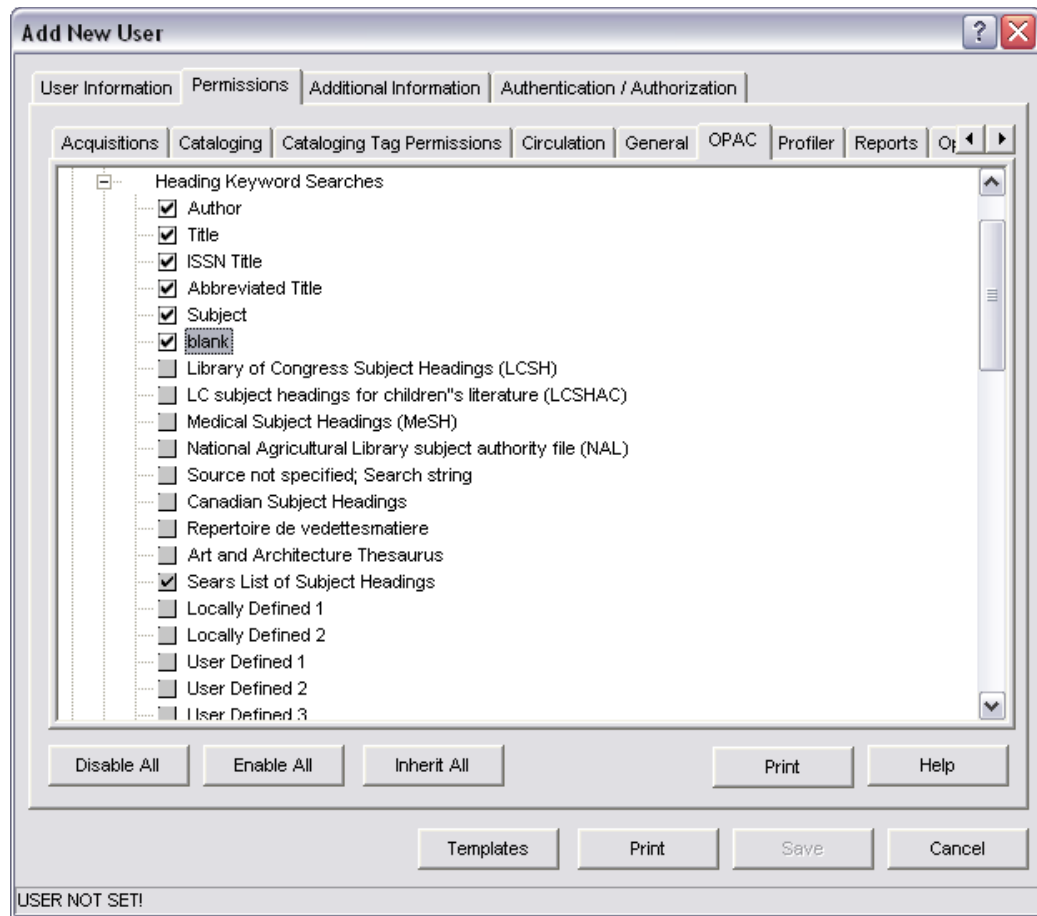


Figure 19-26. Virtua Profiler - Heading Keyword Search Permissions Expanded

5. Select the check box for each category you want to appear in the search categories drop-down list on the Heading tab of the Search window.

Note: Each user can search *only* on the categories that appear in the drop-down list on the Search window.

6. De-select the check box for each category you do NOT want to appear in the drop-down list on the Heading tab of the Search window.
7. Click the Save button.

The permissions are saved for this user. On the Search window in the client, only the categories that you selected for this user will appear in the drop-down list on the Heading tab.

Hint: When working with category permissions for heading keyword searches . . .

- The Locally Defined 1 and Locally Defined 2 permissions correspond to the locally-defined subject heading types configured in the Multiple Subject Headings parameter, located on the Cataloging tab of the Virtua Profiler.
- The User Defined 1 through User Defined 10 permissions correspond to the user-defined subject heading types configured in the Multiple Subject Headings parameter, located on the Cataloging tab of the Virtua Profiler. See the *Virtua Profiler/Cataloging Parameters User's Guide* for more information about this parameter.
- The User Defined permission corresponds to the library-defined search configured in the Tags Indexed for User Defined Search parameter, located on the Cataloging tab of the Virtua Profiler. See the *Virtua Profiler/Cataloging Parameters User's Guide* for more information about this parameter.

19.4.5.3 Setting Category Permissions for Bibliographic Keyword Searches

To set category permissions for bibliographic keyword searches,

1. Access the Permissions tab of the Add/Modify User window for the appropriate user.
2. Click the OPAC tab.
3. Expand the Allowed Search Types heading.
4. Expand the Keyword Searches heading.

The list of available search categories appears ([Figure 19-27](#)).

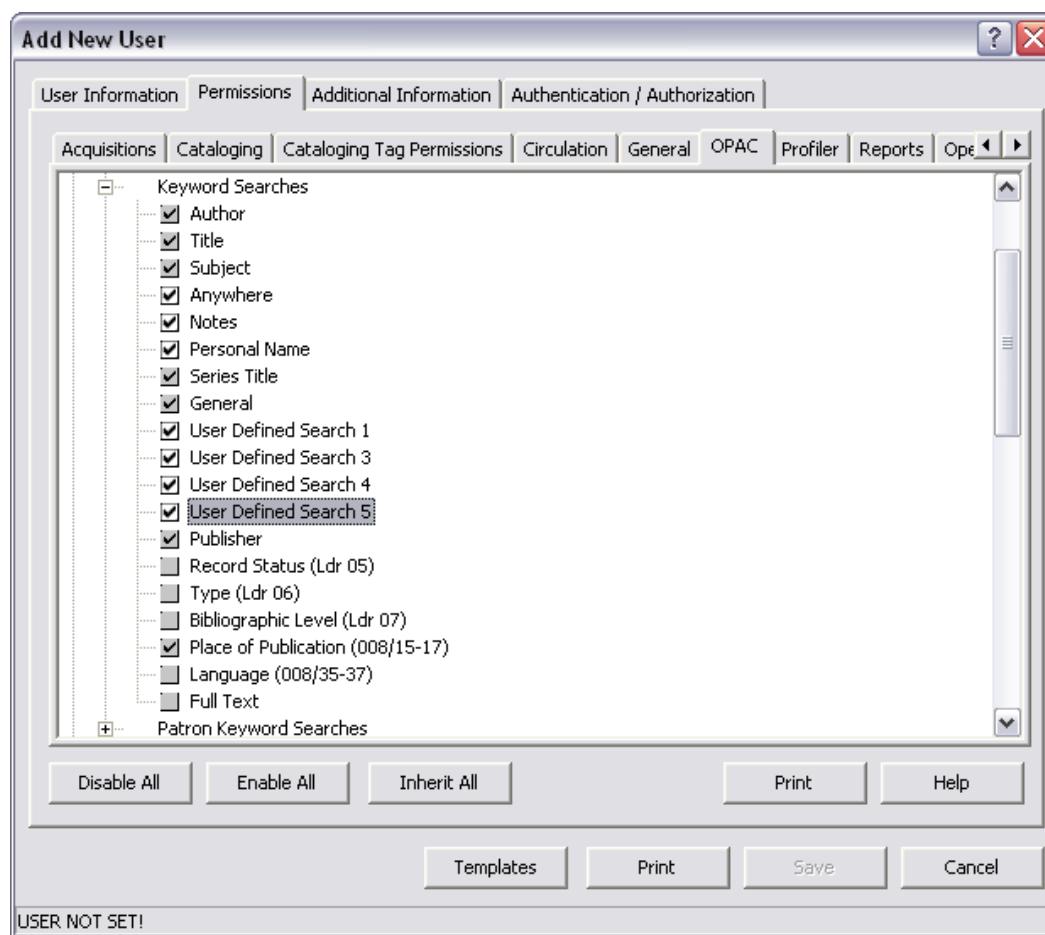


Figure 19-27. Virtua Profiler - Keyword Search Permissions Expanded

5. Select the check box for each category you want to appear in the search categories drop-down lists on the Keyword tab of the Search window.

Note: You cannot display the Location search category in the Category drop-down list.

6. De-select the check box for each category you do NOT want to appear in the search categories drop-down lists on the Keyword tab of the Search window.
7. Click the Save button.

The permissions are saved for this user. On the Search window in the client, only the categories that you selected for this user will appear in the search categories drop-down lists on the Keyword tab. The user permissions you set apply to ALL search categories drop-down lists on the Keyword tab of the Search window.

Note: User permissions do NOT affect the categories that appear on the Categories tab of the Keyword Search Help window.

- ALL indexed categories and category codes appear on the Categories tab of the Keyword Search Help window.
- Users can use category codes to perform a precision search on *any* category, regardless of user permissions.

Hint: When working with category permissions for bibliographic keyword searches, the User Defined Search 1 through User Defined Search 50 permissions correspond to the user-defined search categories configured in the Keyword Indexing Catalog parameter. Note that permissions are only available for search categories that have already been defined. For more information on the Keyword Indexing Catalog parameter, located on the Cataloging tab of the Virtua Profiler, see the *Virtua Profiler/Cataloging Parameters User's Guide*.

19.4.5.4 Setting Category Permissions for Control Number Searches

To set category permissions for control number searches,

1. Access the Permissions tab of the Add/Modify User window for the appropriate user.
2. Click the OPAC tab.
3. Expand the Allowed Search Types heading.
4. Expand the Control Number Searches heading.

The list of available search categories appears ([Figure 19-28](#)).

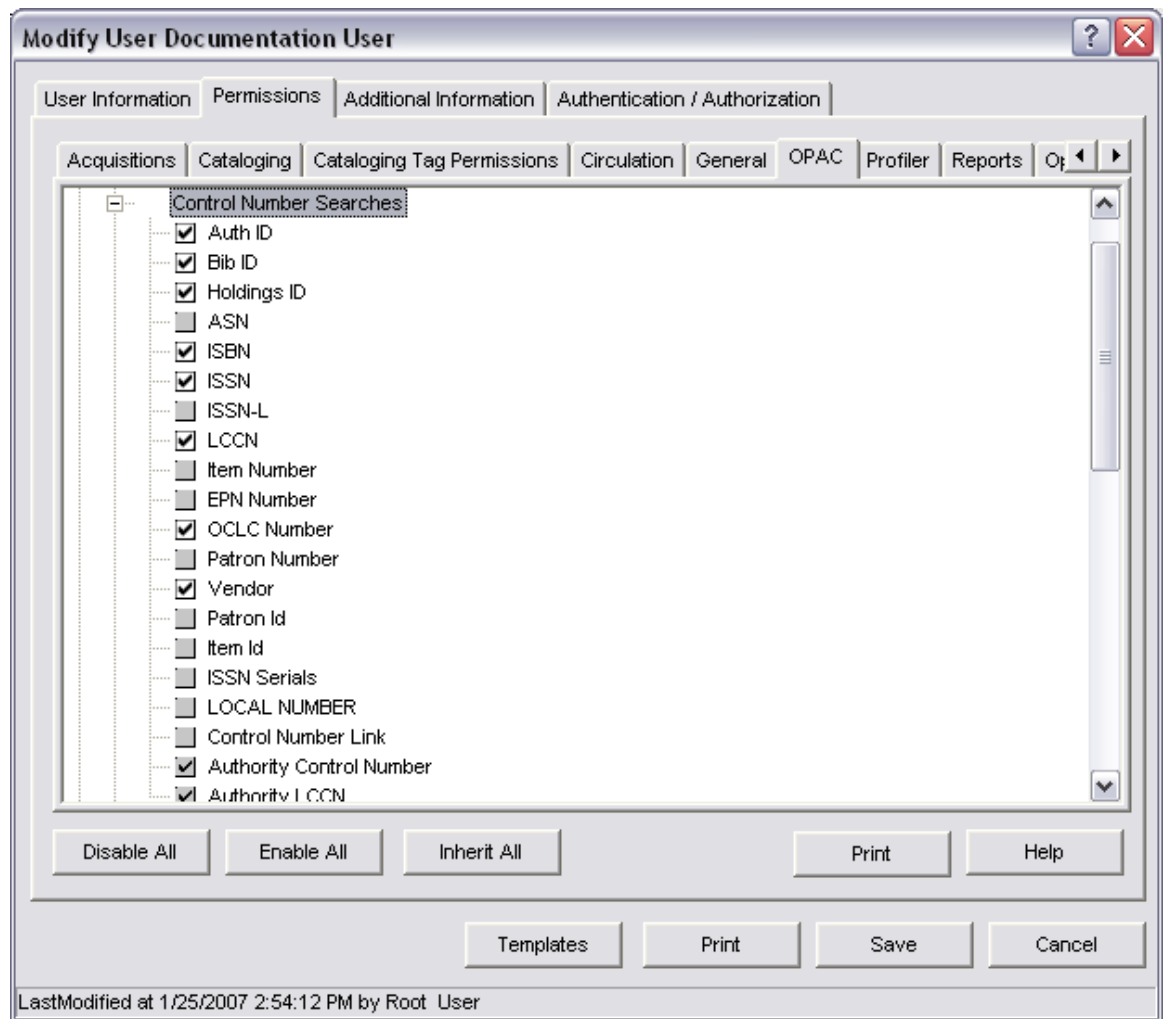


Figure 19-28. Virtua Profiler - Control Number Search Permissions Expanded

5. Select the check box for each category you want to appear in the drop-down list on the Control Number tab of the Search window.
6. De-select the check box for each category you do NOT want to appear in the drop-down list on the Control Number tab of the Search window.
7. Click the Save button.

The permissions are saved for this user. On the Search window in the client, only the categories that you selected for this user will appear in the drop-down list on the Control Number tab.

Note: Each user can search *only* on the categories that appear in the drop-down list on the Search window.

19.4.6 Setting Permissions for InfoStation

On the Permissions tab of the Add/Modify User window or on the Add/Modify Group window, the Reports tab ([Figure 19-29](#)) allows you to set permissions for InfoStation®, Virtua's Web-reporting subsystem.

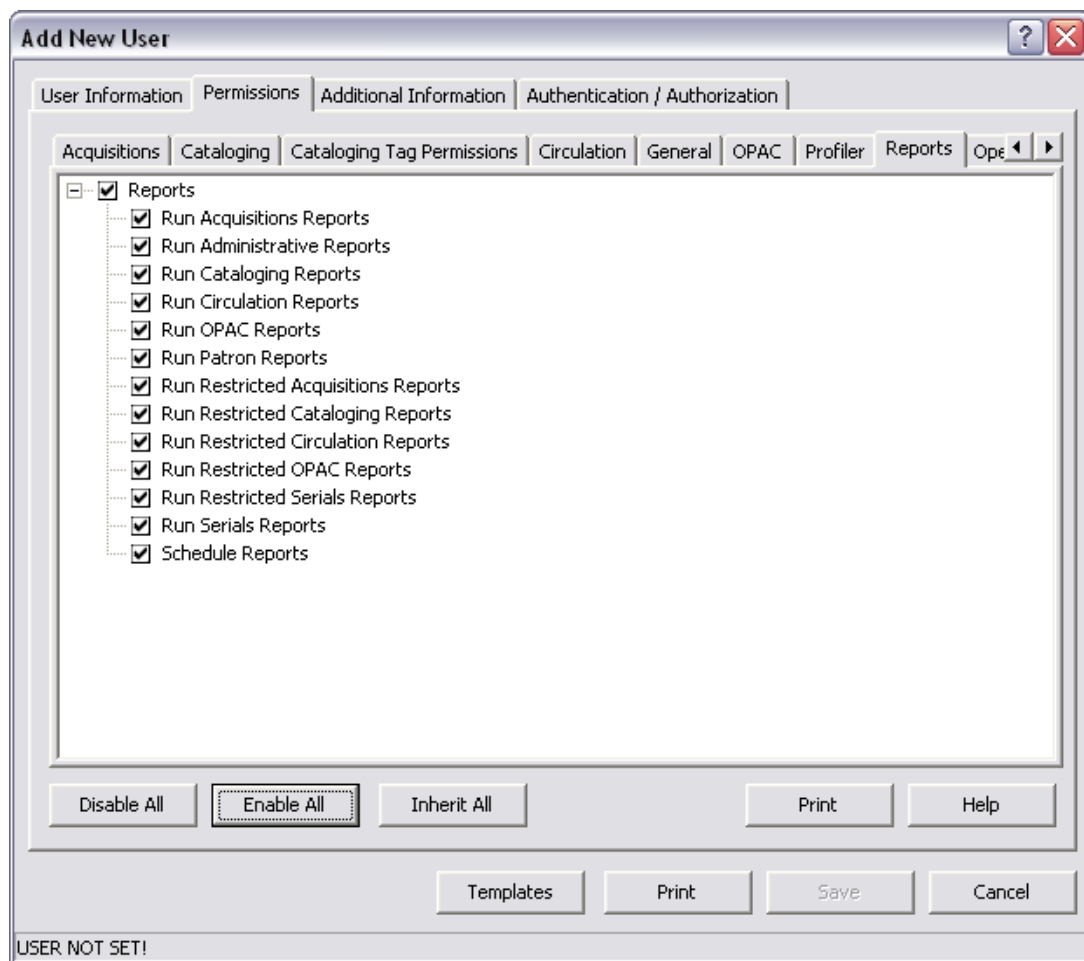


Figure 19-29. Permissions Tab of the Add/Modify User Window - Reports Tab

The Reports tab contains two types of permissions: permission to run reports and permission to schedule reports.

- If you give users permission to run reports in a given Report Group, they can . . .
 - ◆ Run ALL report configurations belonging to that Report Group.
 - ◆ Add, edit, and delete ALL report configurations belonging to that Report Group.
- If you do NOT give users permission to run reports for a Report Group, the user cannot . . .
 - ◆ Configure report Templates belonging to that Report Group.
 - ◆ Add, edit, or delete any report configurations belonging to that Report Group.
- If you give users permission to schedule reports, they can . . .
 - ◆ Schedule report configurations to run automatically.
 - ◆ Schedule *only* the configurations that belong to Report Group(s) for which they have permission to run reports.
 - ◆ View the task log for ALL jobs in the Scheduled Jobs List.
 - ◆ Edit and delete ALL jobs that appear on the Scheduled Jobs List screen.

Important: Keep in mind that if you give a user permission to schedule reports, that user has unrestricted access to ALL scheduled jobs.

To set InfoStation permissions,

1. On the Permissions tab or Add/Modify Group window, click the Reports tab.
2. Set report-scheduling permissions.
 - If you want to let the user schedule reports, select the Schedule Reports check box.
 - If you do NOT want the user to schedule reports, do not select the Schedule Reports check box.
3. Set report-running permissions.
 - If you want to let the user run reports belonging to a certain Report Group, select the check box for that Report Group.
 - If you do NOT want the user to run reports belonging to a certain Report Group, do not select the check box for that Report Group.

Note: The Reports check box at the top of the list does not affect the behavior of the permissions for Report Groups except when the Reports check box is not selected AND when none of the Report Group check boxes is selected. In that case, the user will not even be able to log in to InfoStation, let alone run any reports.

4. When you are finished setting user permissions, click the Save button.
 - If you are setting permissions on the Permissions tab of the Add/Modify User window, when you click the Save button, the window closes, revealing the Add/Modify User window. You must click the Save button on the Add/Modify User window to save the permissions to the user profile.
 - If you are setting permissions on the Add/Modify Group window, when you click the Save button, the window closes, and the entire group profile is saved to the database.

19.4.7 Setting Operational Security Permissions

On the Permissions tab of the Add/Modify User window or on the Add/Modify Group window, the Operational Security tab ([Figure 19-30](#)) allows you to set permissions to ensure operational security in 10 areas of operation.

Note: Be aware that all users inherit new permissions from their group(s), and the new operational security permissions for ALL groups are set to OFF or ON according to your settings. See the section “[Working with the Permissions Default Parameter](#)” for more information.

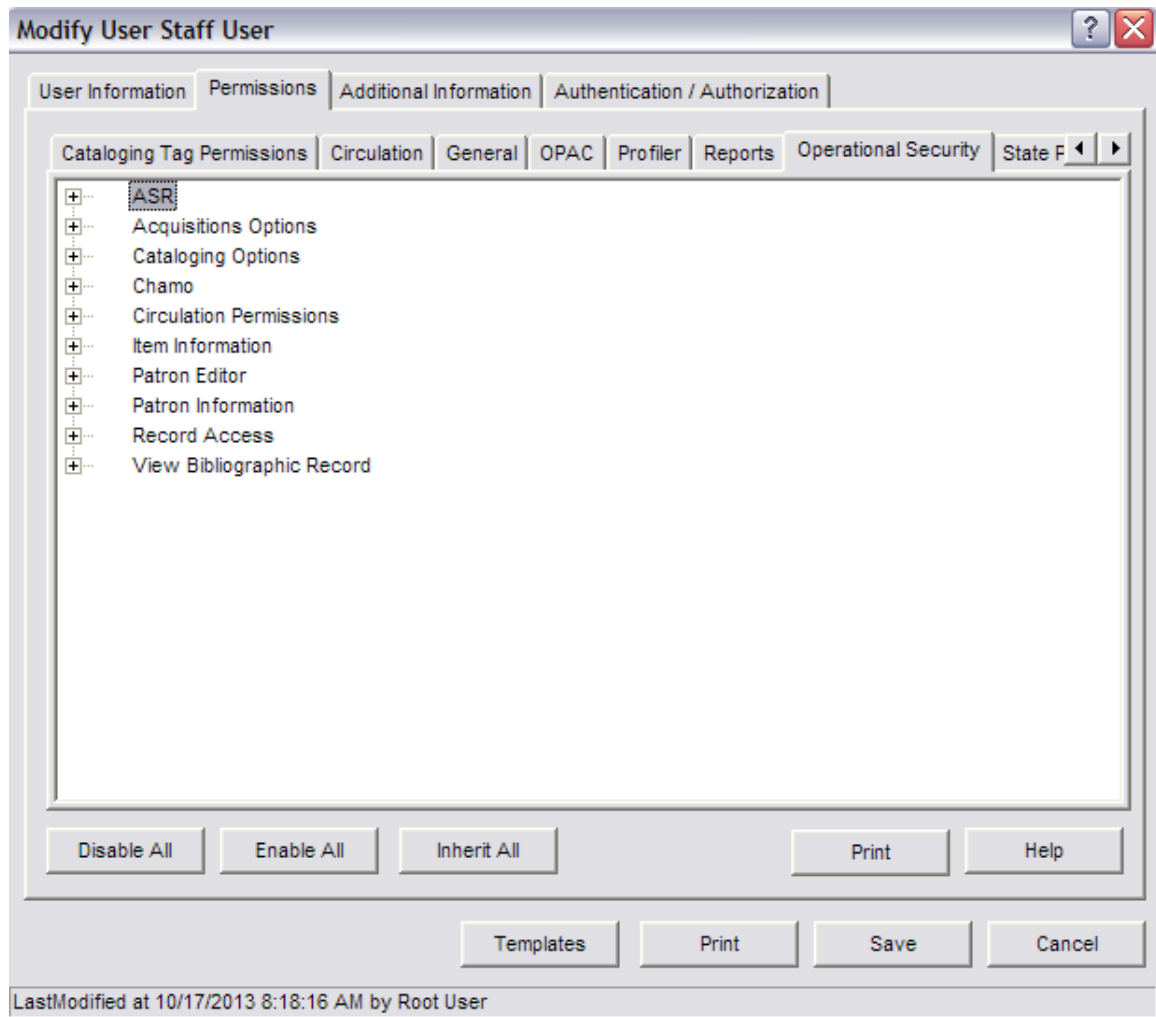


Figure 19-30. Permissions Tab of the Add/Modify User Window - Operational Security Tab

The types of Operational Security permissions are:

- ASR

Note: ASR permissions are for use by ASR users only.

- [Acquisitions Options Permissions](#)
- [Cataloging Options Permissions](#)
- [Circulation Permissions](#)
- [Chamo](#)
- [Item Information Permissions](#)
- [Patron Editor](#)
- [Patron Information Permissions](#)
- [Record Access Permissions](#)
- [View Bibliographic Record Permissions](#)

19.4.7.1 Working with Circulation Permissions

Operational Security - Circulation permissions determine which circulation options the current user or group of users is permitted to perform.

To set the Circulation permissions,

1. On the Permissions tab or Add/Modify Group window, click the Operational Security tab, and then expand the Circulation Permissions heading to see the subheadings (*Figure 19-31*).

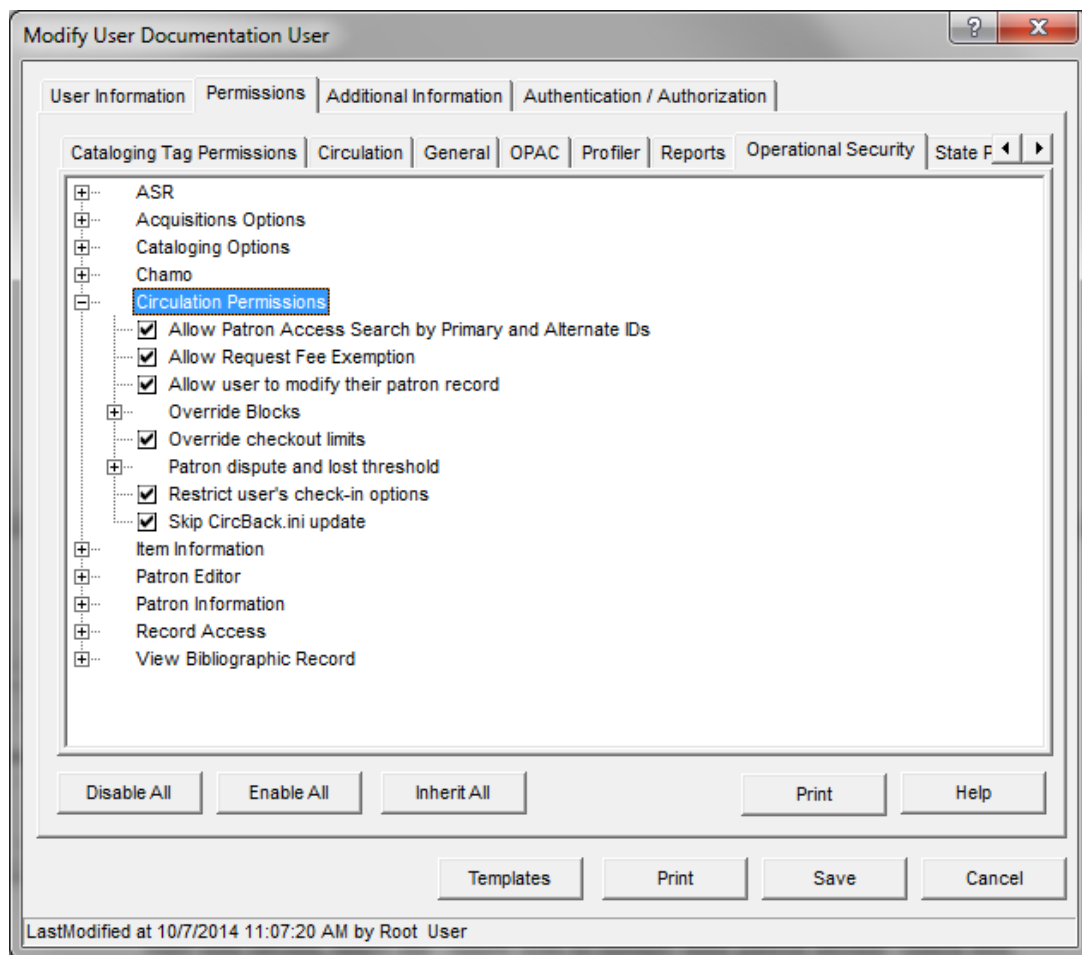


Figure 19-31. Permissions Tab of the Add/Modify User Window - Operational Security: Circulation Permissions

2. If you want to enable a Both button on the Patron Access window in the client so that staff can search both primary and alternate barcode fields with a single search, select the “Allow patron access search by primary and alternate ids” check box.

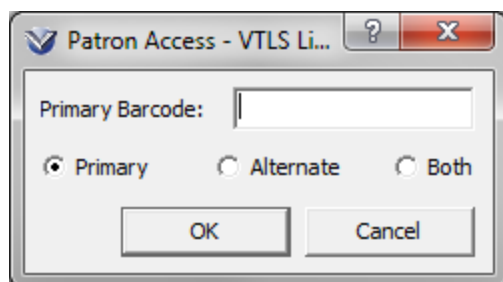


Figure 19-32. Patron Access Window Showing Both Radio Button

3. If you want the user to have access to the Fee Exempt check box in the Request Wizard, select the Allow Request Fee Exemption check box. This will let the staff user waive patron fees associated with requests.
4. If you want the user to be able to modify the patron record associated with their staff user record, select the “Allow user to modify their patron record” check box.
5. If you want the user to be able to override specific patron blocks, expand the Override Blocks subheading and select each specific block as desired. Note that the individual Override Blocks permission settings require that the Permissions > Circulation tab > Blocks > Override permission check box is selected ([Figure 19-33](#)).

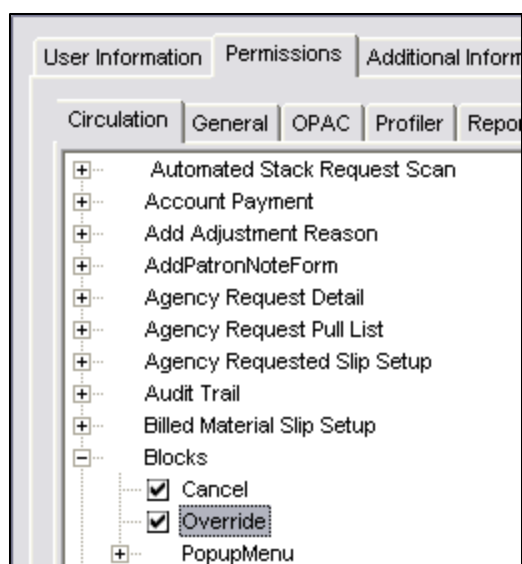


Figure 19-33. Permissions Tab: Circulation - Override Permission

6. If you want the user to be able to override a block on a transaction because the patron has too many items checked out, select the “Override checkout limits.”
7. If you want the user to be able to override or change the count or threshold for a patron’s lost or disputed items, expand the Patron dispute and lost threshold subheading and select each specific item as desired.
8. If you want the Virtua client to skip the update of the **CircBack.ini** file (used by Virtua’s Circulation Backup System) when the user connects to a database from the Virtua client, select the “Skip CircBack.ini update” check box. This setting is particularly useful if your system has a very large number of locations, which can cause a delay as the **CircBack.ini** file is updated when the Virtua client connects to the database. Note that to modify a patron’s record, the Record Access permission Edit Patron Records must be enabled for the user (*Figure 19-34*).

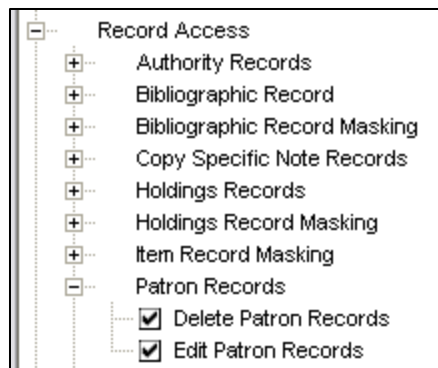


Figure 19-34. Record Access Operational Security Permissions - Patron Records

9. If you want to restrict which options are available to the user on the Check-in window, select the “Restrict user’s check-in options” check box. Enabling this option means that the user will have a very limited number of options available on the Check In window in the Virtua client ([Figure 19-35](#)). This can be useful if a large number of check-in transactions are being processed at a time.

The screenshot shows a window titled "Check In - Wilson Library". It contains three main sections: Information, Settings, and Items.

Information: Check-in Date: N/A, Amnesty Flag: Off.

Settings: A checked checkbox labeled "Select Time:" is followed by a time dropdown menu showing "2:20:23 PM". Below it is a date dropdown menu showing "5/13/2013".

Items: Labeled "Requested by:" and "Route to:". It contains a table with the following headers: Line, Item Barcode, Due Date/Time, Fine, New Status, and Loca... (truncated). The table is currently empty.

At the bottom left, there is a label "Item Barcode:" followed by an empty text input field. At the bottom right, there is a "Check In" button.

Figure 19-35. Check In Window with Restricted Options

Even though most options do not appear when the “Restrict user’s check-in options” check box is enabled, the following options are enabled automatically:

- Print:
 - ◆ Requested slip
 - ◆ In-transit slip
 - ◆ Requested in-transit slip
 - Skip fines notification
 - Suppress patron notes
 - Skip requested activity info
10. When you are finished setting the permissions, click the Save button.
- If you are setting permissions on the Permissions tab of the Add/Modify *User* window, when you click the Save button, the window closes, revealing the Add/Modify User window. You must click the Save button on the Add/Modify User window to save the permission to the user profile.
 - If you are setting permissions on the Add/Modify *Group* window, when you click the Save button, the window closes, and the entire group profile is saved to the database.

19.4.7.2 Working with Record Access Permissions

Operational Security Record Access permissions give you granular control over record handling by letting you grant or deny permission to edit and delete bibliographic, authority, holdings, patron, vendor, and item records.

Unlike other access permissions, which let you grant or deny permission to access specific controls, such as an Edit button, Operational Security record access permissions let you set permissions for editing and deleting based on the specific *type* of record. For authority records, you can also set permissions for editing and deleting authority records with a specific authority bib level.

Using Operational Security record access permissions, you can control a user's ability to...

- Edit specific *types* of records, causing the Edit button to appear or not to appear on the View Record window, depending on the type of record the user is viewing. For example, you can give a user permission to edit bibliographic records but not authority records. For authority records, you can also give a user permission to edit or delete records based on the record's authority Bib Level.

Note: When you deny a user the permission to edit records, you also deny that user the ability to save records back to the source database. By enabling the Save Copy to Database function, however, you can give users who do NOT have permission to edit records the ability to save copies of records to another database. For details, see the *Virtua Union Catalog Reference Guide*.

- Delete specific *types* of records by causing the Delete Record from Database function to appear on the File menu as appropriate, depending on the user's permissions and the type of record that appears in the MARC Editor.

Note: The Delete Record from Database function is enabled on the File menu *only* when a record is open in the MARC Editor. You can open a record in the MARC Editor *only* if you have permission to edit records. Therefore, if you want to give a user permission to delete records, you must ALSO give that user permission to edit records.

- Alter and/or view masked bibliographic, holdings and item records in the Virtua client. For details on record masking, see the *OPAC Workflow-Based Reference Guide*.
- View items that carry a status that has been flagged as masked in the Virtua client.

To set record access permissions,

1. On the Permissions tab or Add/Modify Group window, click the Operational Security tab, and then expand the Record Access heading (*Figure 19-36*).

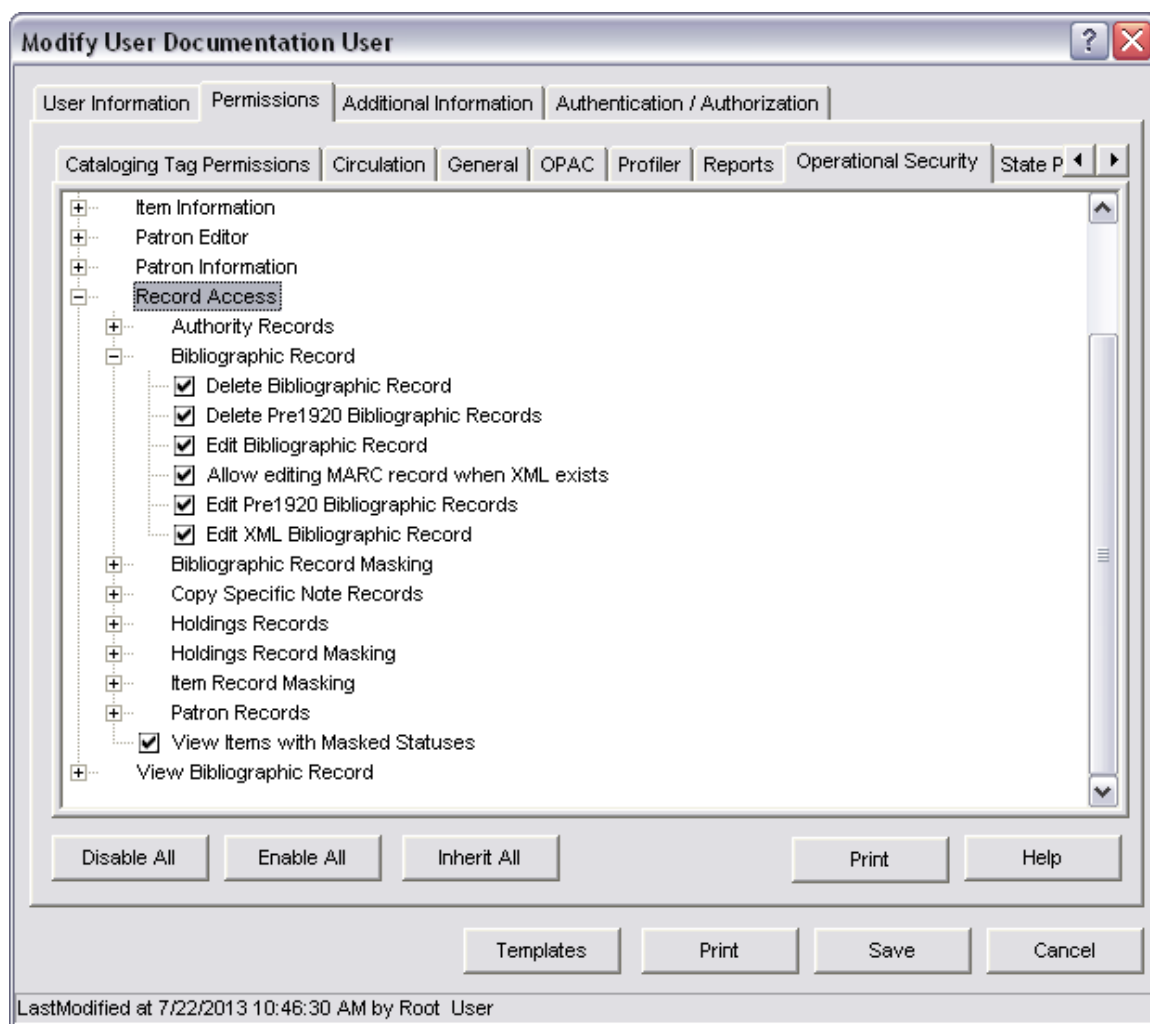


Figure 19-36. Permissions Tab of the Add/Modify User Window - Operational Security: Record Access

2. Assign Record Access permissions to different types of records as desired. To do this, expand the tree for the desired record type, and select or de-select the permissions as desired.

Example 1: Bibliographic Records

To assign a user permission to edit and delete bibliographic records,

1. Select both the Delete Bibliographic Records check box and Edit Bibliographic Records check box.

Example 2: Holdings and Patron Records

To assign a user permission to edit and delete holdings or patron records,

- Follow the steps for assigning permission to edit and delete bibliographic records, except expand the Holdings Records tree or the Patron Records tree instead of the Bibliographic Records tree.

Example 3: Masked Records

To assign a user permission to edit (alter) and view masked records,

1. Expand the Record Masking tree for the desired record type.
2. Select both the Alter Masking of Records check box and View Masked Records check box.

Example 4: Authority Records

To assign a user permission to delete ALL authority records,

1. Expand the Delete Authority Records check box.
2. Select *All – (Any Bib Level)*
3. Do NOT select any other check box in the branch.

To deny a user permission to delete ALL authority records,

1. Expand the Delete Authority Records check box.
2. De-select each check box in the branch.

To assign a user permission to edit ALL authority records,

1. Expand the Edit Authority Records check box.
2. Select *All – (Any Bib Level)*
3. Do NOT select any other check box in the branch.

To deny a user permission to edit ALL authority records,

1. Expand the Edit Authority Records check box.
2. De-select each check box in the branch.

To assign a user permission to delete only specific types of authority records,

1. Expand the Delete Authority Records check box.
2. Select the check box for each specific type of authority record for which you want to give permission.
3. Do NOT select *All – (Any Bib Level)*

To assign a user permission to edit only specific types of authority records,

1. Expand the Edit Authority Records check box.
 2. Select the check box for each specific type of authority record for which you want to give permission.
 3. Do NOT select *All – (Any Bib Level)*
4. Set the View Items with Masked Statuses permission as desired.

To save record access permissions,

- When you are finished setting the permissions, click the Save button.
 - ♦ If you are setting permissions on the Permissions tab of the Add/Modify User window, when you click the Save button, the window closes, revealing the Add/Modify User window. You must click the Save button on the Add/Modify User window to save the permission to the user profile.
 - ♦ If you are setting permissions on the Add/Modify Group window, when you click the Save button, the window closes, and the entire group profile is saved to the database.

19.4.7.3 Working with Patron Information Permissions

Operational Security Patron Information permissions ([Figure 19-37](#)) consist of one element: MARC Format Tab. This permission determines whether a user has the ability to see the MARC Format tab of the Patron Information window in the Virtua client.

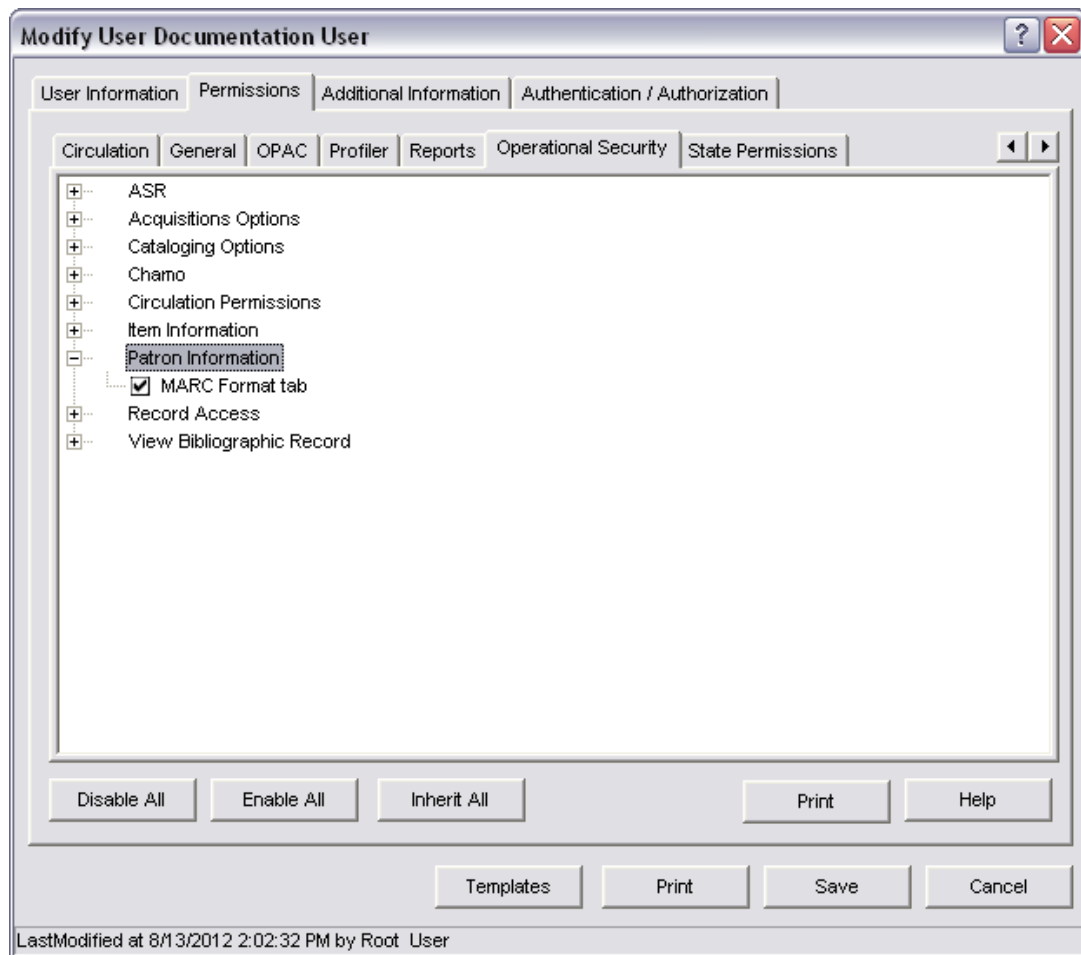


Figure 19-37. Permissions Tab of the Add/Modify User Window - Operational Security: Patron Information

If the MARC Format Tab check box is not selected on the Operational Security tab, the MARC Format tab of the Patron Information window will not appear in the Virtua client for that user.

19.4.7.4 Working with Cataloging Options Permissions

Operational Security - Cataloging Options permissions ([Figure 19-38](#)) determine 1) whether a user has permission to override a block when trying to check in a serial issue that does not belong to the current location, and 2) whether a user has the ability to change specific settings on the Other Options tab of the Cataloging Options window in the Virtua client. In addition, for each cataloging option permission, the root user can determine the default setting, i.e., whether it is ON or OFF. Thus, based on the permissions set for cataloging options, the associated settings in the client for a given user will be in one of three states: enabled, disabled, or enabled/pre-selected.

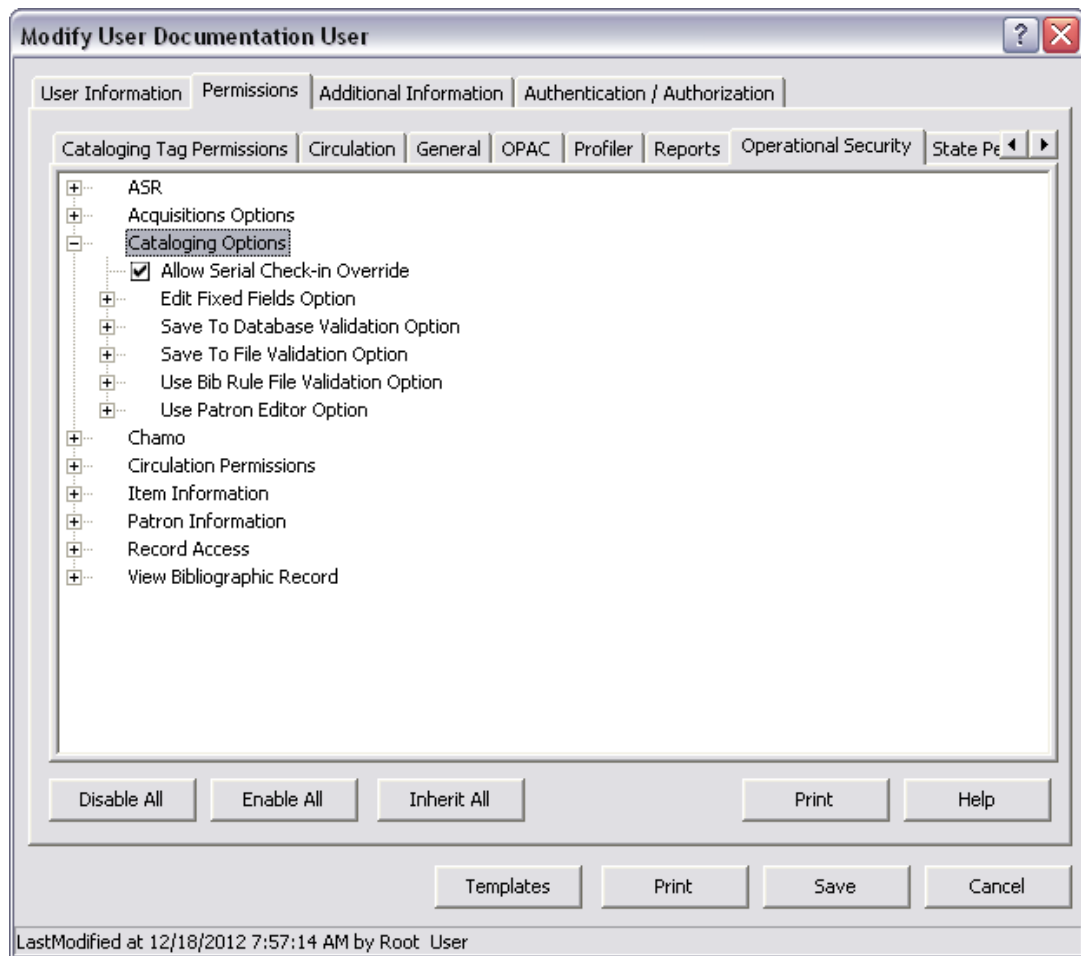


Figure 19-38. Permissions Tab of the Add/Modify User Window - Operational Security: Cataloging Options

The Allow Serial Check-in Override permission allows a user—who is otherwise restricted by log-in location from being able to check in serials—to override the restriction by clicking the Override button and check in serials.

Aside from the Allow Serial Check-in Override permission, the other Cataloging Options permissions shown in [Figure 19-38](#) correspond to the following check boxes on the Other Options tab of the Cataloging Options window in the client:

- Edit 006, 007, 008 in Editor
- Validate when Saving to Database
- Validate when Saving to File
- Use Specific Bibliographic Rule Files
- Use Patron Editor.

To set Cataloging Options permissions and configure default values for settings in the client,

1. On the Permissions tab or Add/Modify Group window, click the Operational Security tab, and then expand the Cataloging Options heading (*Figure 19-39*).

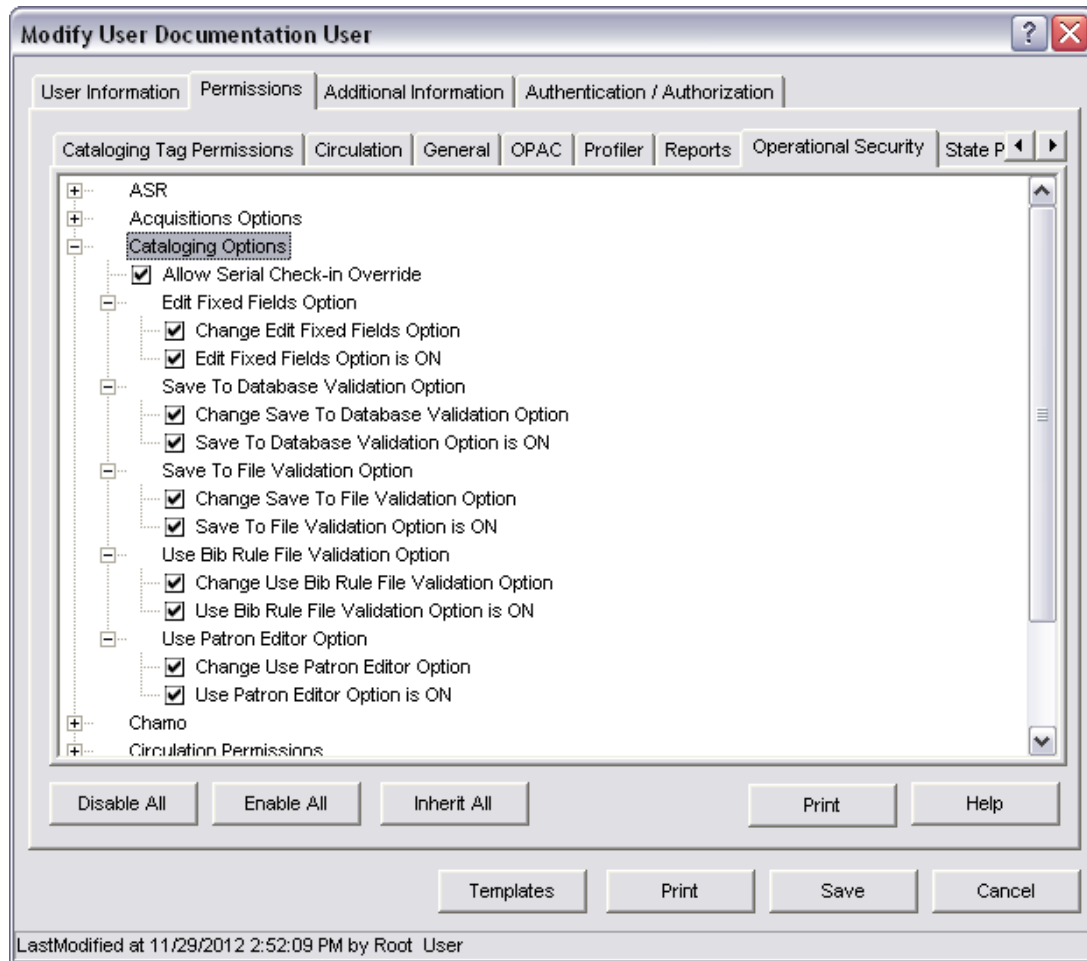


Figure 19-39. Permissions Tab of the Add/Modify User Window - Operational Security: Cataloging Options

2. Set the Allow Serial Check-in Override as desired.
3. For each Cataloging Option subheading, e.g., Save To File Validation Option, assign permission as appropriate.
 - If you want to give the user permission to *change* the option setting, select the check box labeled “Change...Option”
 - If you want the option pre-selected in the client by default, select the check box whose label ends in “is ON.”

4. When you are finished setting the Cataloging Options permissions, click the Save button.

Important: If a user has used the Virtua client on a workstation before changing these settings, Virtua will use that user's pre-existing values as set in the registry to determine whether the option is pre-checked IF the corresponding "Change xxx Option" in the Profiler allows the user to change that option.

19.4.7.5 Working with Acquisitions Options Permissions

Operational Security Acquisitions Options permissions ([Figure 19-37](#)) control a user's ability to perform certain actions related to the Acquisitions module in Virtua. These elements are explained briefly below.

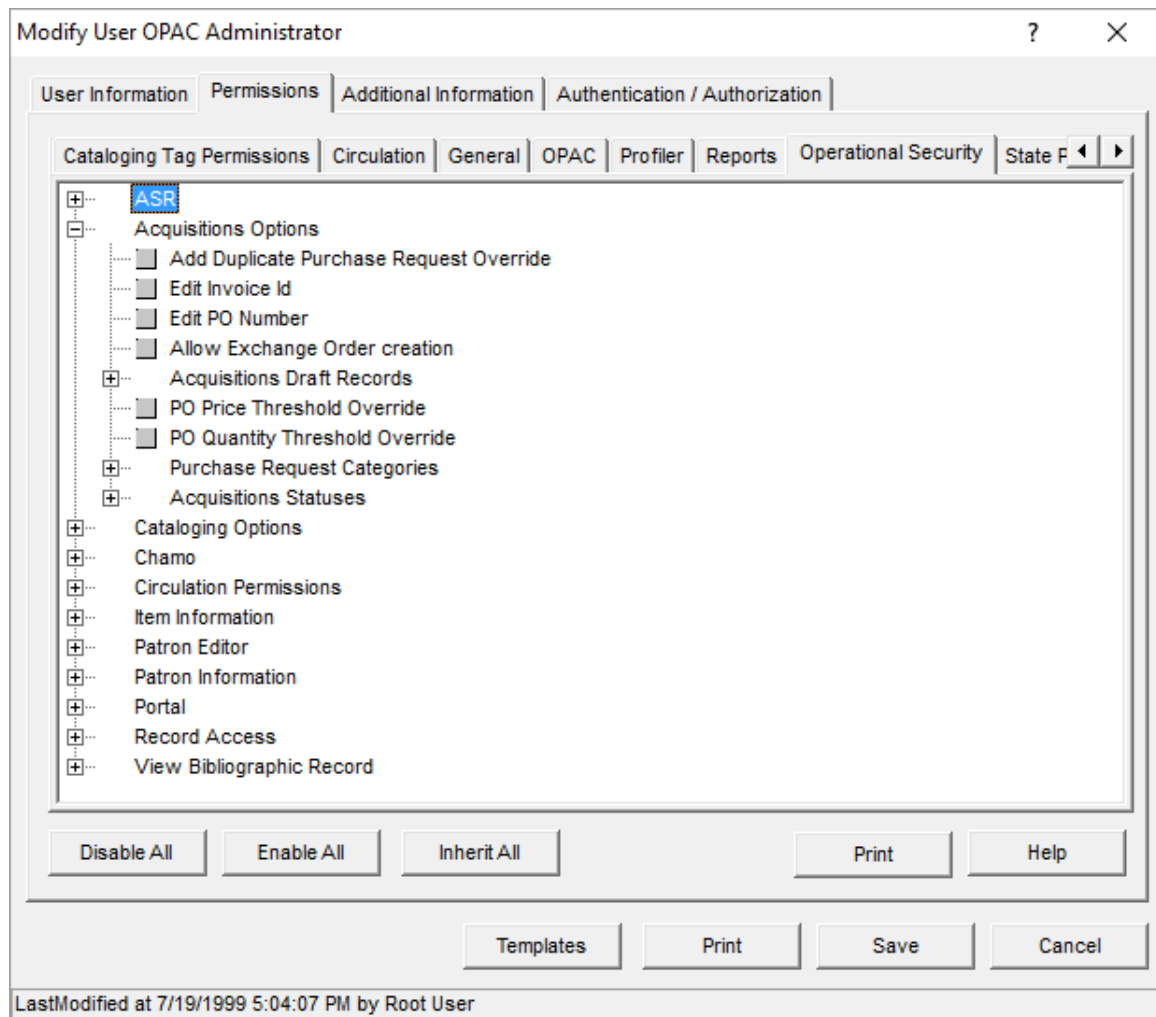


Figure 19-40. Permissions Tab of the Add/Modify User Window - Operational Security: Acquisitions Options

- **Add Duplicate Purchase Request Override** - Determines whether the staff user can create a purchase request that is a duplicate of an existing purchase request.
- **Edit Invoice ID** - Determines whether a user has permission to edit the invoice number of an invoice that has not yet been paid or partially paid.
- **Edit PO Number** - Determines whether a user has permission to edit the order number of a purchase order that has not yet been paid or partially paid.
- **Allow Exchange Order creation** - Determines whether the Exchange Order check box will appear on the Add PO Request screen.

- **Acquisitions Draft Records** - Determines whether the user can edit or view draft acquisitions records that were created by other users.
- **PO Price Threshold Override** - Determines whether the user can override the alert that appears when the price on a purchase order exceeds the Total PO Price Threshold as determined on the Acquisitions Basic Options window. See the *Virtua Profiler/ Acquisitions Parameters User's Guide* for information about this setting.
- **PO Quantity Threshold Override** - Determines whether the user can override the alert that appears with the number of items on a purchase order exceeds the Total PO Quantity Threshold as determined on the Acquisitions Basic Options window. See the *Virtua Profiler/ Acquisitions Parameters User's Guide* for information about this setting.
- **Purchase Request Categories** - Determines the user's level of access for purchase requests for materials of different categories. The categories that appear here are those configured in the Purchase Request Categories parameter (see the *Virtua Profiler/ Acquisitions Parameters User's Guide* for information about this parameter).
- **Acquisition Statuses** - Determines the user's level of access to acquisition records with different statuses

If you want a user to be able to override Virtua's notifications in the client with regard to any of these elements, select the appropriate check box(es).

19.4.7.6 Working with Item Information Permissions

Operational Security Item Information permissions (*Figure 19-41*) consist of the following elements:

- Item Acquisitions tab
- Allow an item barcode to be modified
- Allow an item owning location to be modified
- Allow item status to be edited at any location

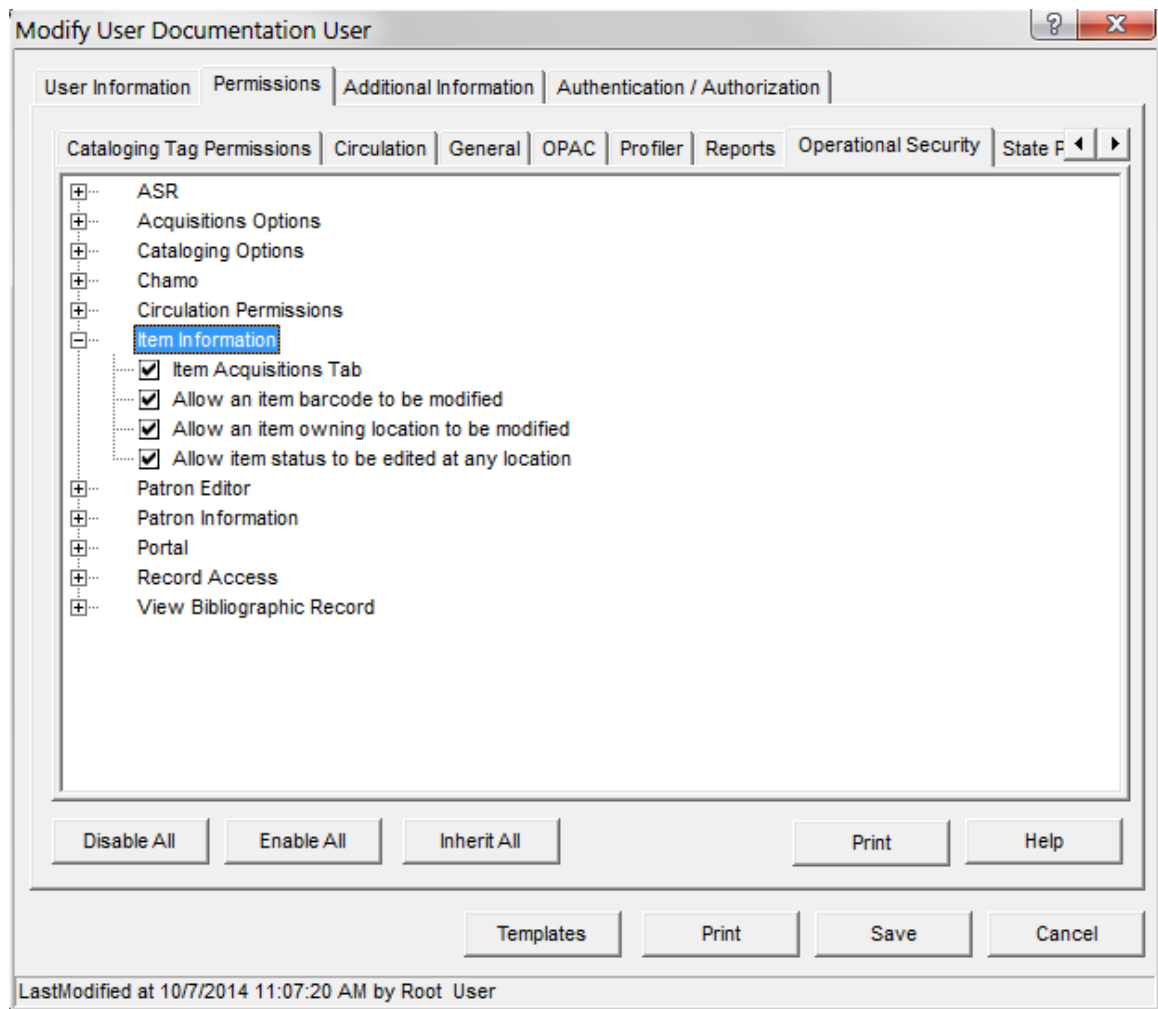


Figure 19-41. Permissions Tab of the Add/Modify User Window - Operational Security: Item Information

- **Item Acquisitions tab** - This permission determines whether a user has the ability to see the Item Acquisitions tab on the Item Information window in the Virtua client.

If the Item Acquisitions Tab check box is not selected on the Operational Security tab, the Item Acquisitions tab of the Item Information window will not appear in the Virtua client for that user.

- **Allow an item barcode to be modified** - This permission determines whether a user has the ability to modify barcodes for item records.

If the “Allow an item barcode to be modified” check box is not selected, the user will not be able to modify an item barcode.

- **Allow an item owning location to be modified** - This permission determines whether a user has the ability to modify the owning location for item records.

If the “Allow an item owning location to be modified” check box is not selected, the user will not be able to modify the Location field for the item.

- **Allow item status to be edited at any location** - This permission determines whether a user has the ability to modify the status for item records even when the user does not have permission to modify items at the owning location.

If the “Allow item status to be edited at any location” check box is not selected, the user will not be able to modify the Status field for items that belong to a location that is not a log-in location for the user.

19.4.7.7 Working with View Bibliographic Record Permissions

Operational Security View Bibliographic Record permissions consist of one element: Statuses tab. This permission determines whether a user has the ability to see the Statuses tab on the View Bibliographic Record window in the Virtua client.

If the Statuses Tab check box is not selected on the Operational Security tab, the Statuses tab of the View Bibliographic Record window will not appear in the Virtua client for that user.

19.4.7.8 Working with Chamo Permissions

Operational Security – Chamo permissions (*Figure 19-42*) consist of three elements:

- Allow Login
- Saved List Superuser
- View Patron Information.

These settings are enabled by default for *existing* groups, but for any new user groups added after the update to the 2011.2.1 Virtua Profiler, you will need to enable them manually.

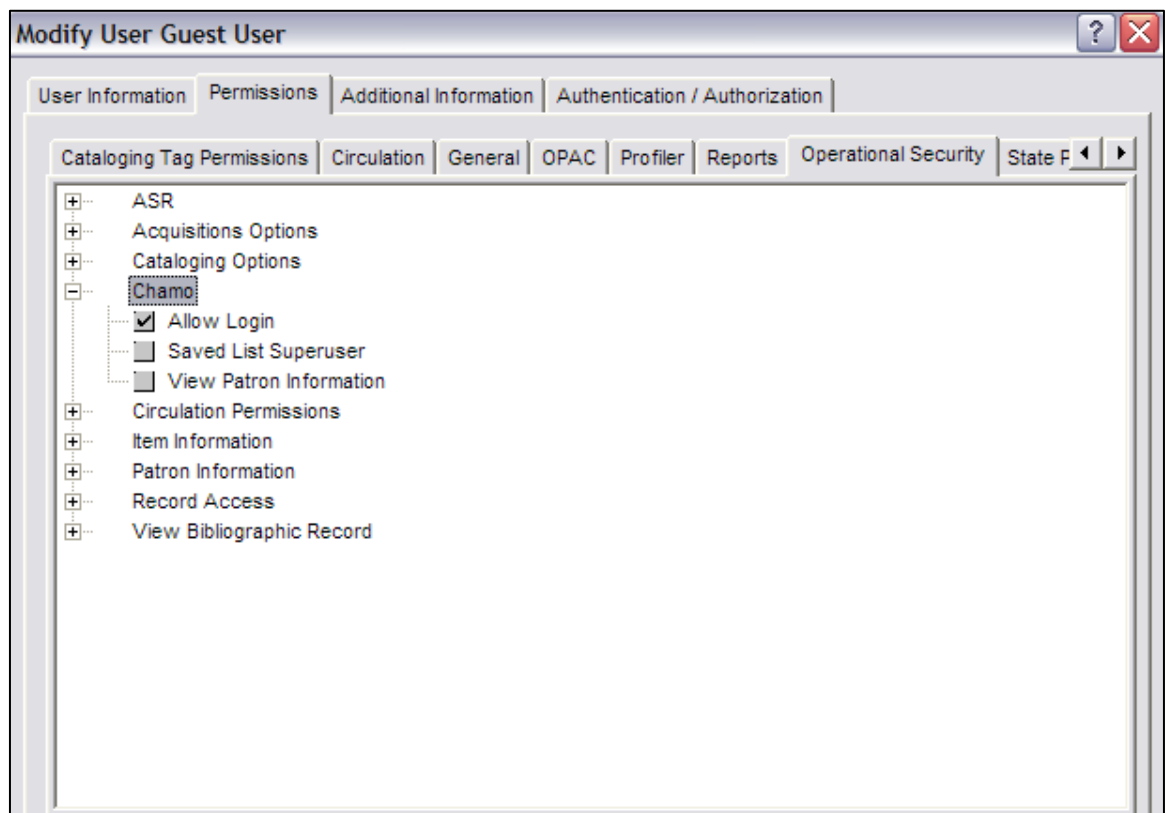


Figure 19-42. Permissions Tab of the Add/Modify User Window - Operational Security: Chamo

- **Allow Login permission** - Determines whether a user can log in to Chamo.
- **Saved List Superuser permission** - Determines whether a user is a Saved List Superuser.
- **View Patron Information permission** - Determines whether a user has permission to view patron records when they log in to the Chamo staff interface.

19.4.7.9 Working with Patron Editor Permissions

Operational Security – Patron Editor permissions (*Figure 19-43*) consist of four elements for display on the Patron Editor window:

- **Disable Keep Checkout History** (The Keep Checkout History check box is displayed on the Card Number/Password tab.)
- **Show Country**
- **Show County**
- **Show Title** (On the Name tab, the Title field values are Dr., Miss, Mr., Mrs., or Ms.)

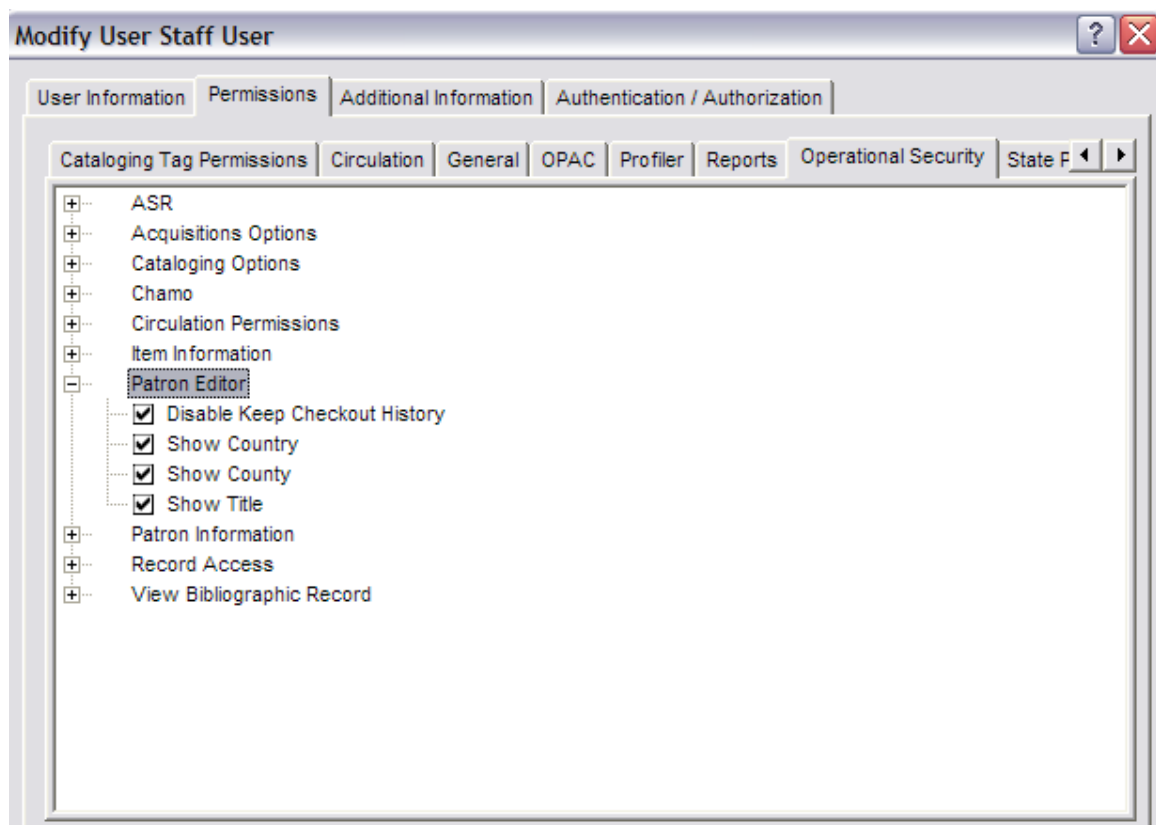


Figure 19-43. Permissions Tab of the Add/Modify User Window - Operational Security: Patron Editor

19.4.8 Working with Record State Permissions

On the State Permissions tab ([Figure 19-44](#)) of the User Permissions and Add/Modify Group windows, you can set permissions for viewing, editing, and saving state records.

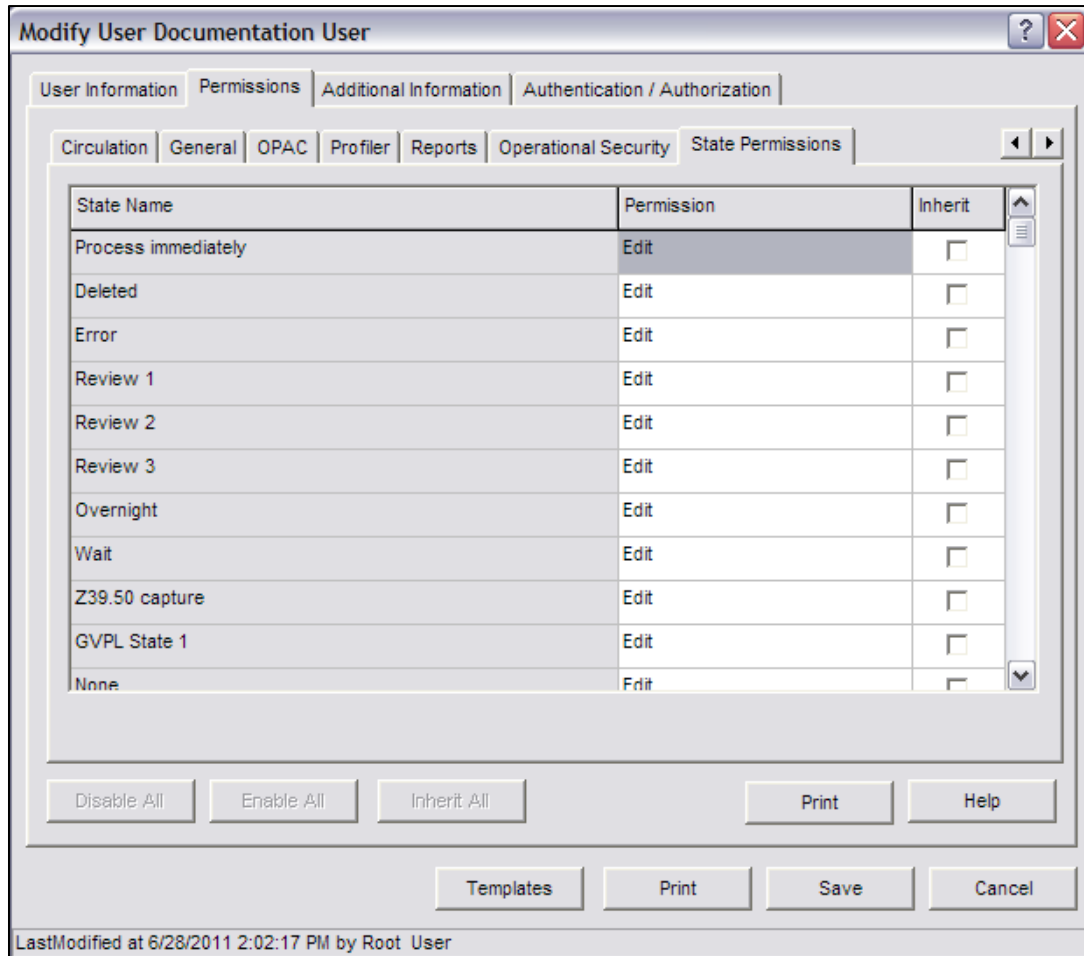


Figure 19-44. Permissions Tab of the Add/Modify User Window - State Permissions Tab

19.4.8.1.1 Aspects of the State Permissions Tab

The State Permissions tab contains a list box, which displays a list of record states defined for the database. The list box displays three columns of information:

- **State Name** - The name of the record state. You can define record states via the Record States parameter, which appears on the Cataloging tab in the Virtua Profiler. For details, see the *Virtua Profiler/Cataloging Parameters User's Guide*. In addition to any library-defined record states that may be available, the following system-defined record states always appear:
 - ◆ **Process Immediately**

Note: Permissions for the Process Immediately record state work somewhat differently than permissions for other record states. For details, see the section “[A Note about Permissions for the Process Immediately Record State](#)” in this chapter.
 - ◆ **Deleted**
 - ◆ **Error**
- **Permission** - For a given record state, the level of permission granted to the user or group. You can set the permission to one of the following levels:
 - ◆ **View** - The user can view records in a given state but cannot edit or save them. For example, if a user's permission is set to View for the Overnight record state . . .
 - Records in the Overnight state will appear in the user's browse, keyword, and control number search results in the Virtua OPAC.
 - The user can use a Search by State to search for records in the Overnight state.
 - The user cannot edit records currently in the Overnight state.
 - The user cannot assign the Overnight state to records saved to the database.
 - ◆ **Edit** - The user can view, edit, and save records in a particular state. For example, if a user's permission is set to Edit for the Overnight state . . .
 - Records in the Overnight state will appear in the user's browse, keyword, and control number search results in the Virtua OPAC.
 - The user can use a Search by State to search for records in the Overnight state.
 - The user can edit records currently in the Overnight state.
 - The user can assign the Overnight state to records saved to the database.

- ◆ **None** - The user cannot view, edit, or save records in a particular record state. For example, if a user's permission is set to None for the Overnight state . . .
 - Records in the Overnight state will NOT appear in OPAC search results. If a corresponding base record exists, the base record appears.
 - Records in the Overnight state are omitted from the Search by State results.
 - If the user tries use a Search by State to search specifically for records in the Overnight state, the user receives an error message indicating that he is not authorized to search for records in that state.
- **Inherit** - Contains a check box, which indicates whether the user inherits state permissions from group permissions. For details, see the section [“Setting a User's State Permissions to Be Inherited from the Group”](#) in this chapter.

Note: The Inherit column does NOT appear on the State Permissions tab of the Add/Modify Group window.

19.4.8.2 Setting State Permissions

You can set state permissions in two ways.

- You can set the permissions to be specific to the individual user or group.
- You can set a user's state permissions to be inherited from the group.

19.4.8.2.1 Setting State Permissions Specific to the User or Group

To set state permissions specific to a user or group,

1. On the User Permissions or Add/Modify Group window, click the State Permissions tab.
2. Highlight the Permission cell for the desired record state.
3. Click the cell again.

A drop-down list box appears in the cell ([Figure 19-45](#)).

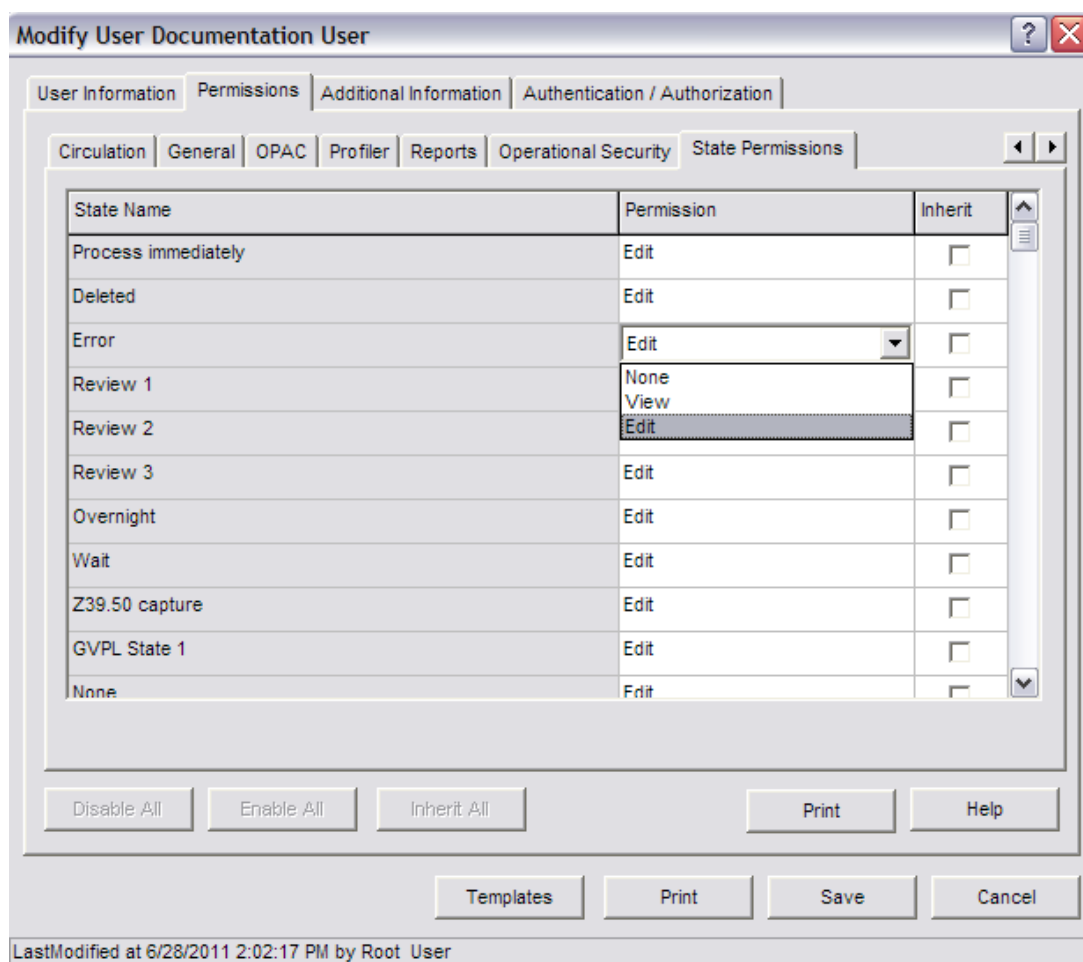


Figure 19-45. State Permissions Tab - Drop-down List Box

4. From the drop-down list box, choose a permission level: None, View, or Edit.
5. If the check box in the Inherit column is selected, de-select it. The Inherit check box appears only on the Permissions tab of the Add/Modify User window. It does not appear on the Add/Modify Group window.

Important: If the Inherit check box is selected, the user's state permissions will NOT be saved.

6. When you are finished setting permissions, click the Save button
 - If you are setting permissions on the Permissions tab of the Add/Modify User window, when you click the Save button, the window closes, revealing the

Add/Modify User window. You must click the Save button on the Add/Modify User window to save the permission to the user profile.

- If you are setting permissions on the Add/Modify Group window, when you click the Save button, the window closes, and the entire group profile is saved to the database.

19.4.8.2.2 Setting a User's State Permissions to Be Inherited from the Group

Inheritance of state permissions works differently than inheritance of other user permissions in that you have the option of allowing *continued* inheritance.

For all user permissions, when you add new users, they inherit all the permissions of the group to which they are assigned, including state permissions. You can then modify the individual user permissions as needed.

After you edit and save the permissions for a new user, the user becomes independent of the group and does not inherit changes to the group permissions. State permissions, however, give you the option of allowing *continued* inheritance.

This means that when you set state permissions, if you select the Inherit option, the user continues to inherit the group state permissions even after you save the user's individual permissions. In this way, changes to the *group's* state permissions affect the *user's* state permissions.

Note: If you select the Inherit option, users who belong to more than one group inherit the *highest* permission level allowed. For example, if a user belongs to two groups, one that allows View permissions and one that allows Edit permissions, the user inherits the Edit permissions.

To set a user's state permissions to be inherited from group permissions,

1. On the Permissions tab of the Add/Modify User window, click the State Permissions tab.
2. In the Inherit column, select the Inherit check box for the permission you want the user to inherit.

Note: When you select the Inherit check box, the permission does not change immediately. The user permission reflects the group permission only after you save your changes to the database.

3. When you are finished setting the user's state permissions, click the Save button.

The user permissions are saved, and the Permissions tab of the Add/Modify User window closes, revealing the Modify User window.

19.4.8.2.3 A Note about Permissions for the Process Immediately Record State

Permissions for the Process Immediately record state must be interpreted somewhat differently than permissions for other record states.

You can flag records with a particular record state using Cataloging load options. For example, you can set the Virtua client Load Options to assign the Overnight record state to records that you save to the database. In this way, when you save a record to the database via the Virtua client, it is flagged with the Overnight record state. For additional details on client Load Options, see the *Virtua Cataloging User's Guide*.

When you load a record using the Process Immediately record state, any existing record state flag is removed, and the resulting base record retains NO record state designation. Whereas other record states are used to flag records, the Process Immediately record state is used to un-flag state records.

Because records that are saved with the Process Immediately Load Option do NOT retain the Process Immediately flag, the View and None permission levels do NOT apply to the Process Immediately record state. Since Process Immediately records cannot exist, then they cannot be viewed or modified.

The Edit permission level, however, does apply to the Process Immediately record state and determines whether a user is allowed to *save* records using the Process Immediately Load Option.

If you do NOT want users to be allowed to save records with the Process Immediately record state, then set their Process Immediately record state permissions to View or None.

Note: Records with no explicit record state are base records. Operational Security permissions determine each user's ability to edit base records. For details, see the section "[Setting Operational Security Permissions](#)" in this chapter.

19.4.9 Importing Files to Update Current User Permissions

To ensure that your database is up to date while maintaining its customized aspects, you *must* use the Import New Permissions feature to import the file of current permissions associated with a given version of Virtua. The permissions file is generated for each version of Virtua and is packaged with the corresponding version of the Virtua Profiler.

After you import the new permissions, you will need to save the permissions file so that you can refer to it when configuring the new settings.

When you use the Import New Permissions function, you *keep* the permissions already set in your database. This means that after you import new permissions, you need only set the *new* permissions for each user. All pre-existing permissions retain their previous settings.

Note: By default...

- When Virtua permissions are imported, Virtua enables the appearance and use of any new permission-based features for ALL groups (and users inherit the settings). If you do not want Virtua to do this, set the [Permissions Default parameter](#).
- Virtua disables new operational security permissions for all groups (and users inherit the settings).

To import the user permissions associated with the latest version of Virtua,

1. On the Virtua Profiler menu bar, click File.
2. Choose Import New Permissions.

The Open dialog box appears ([Figure 19-46](#)), displaying a file name such as **Release xx_xpermissions.prf**.

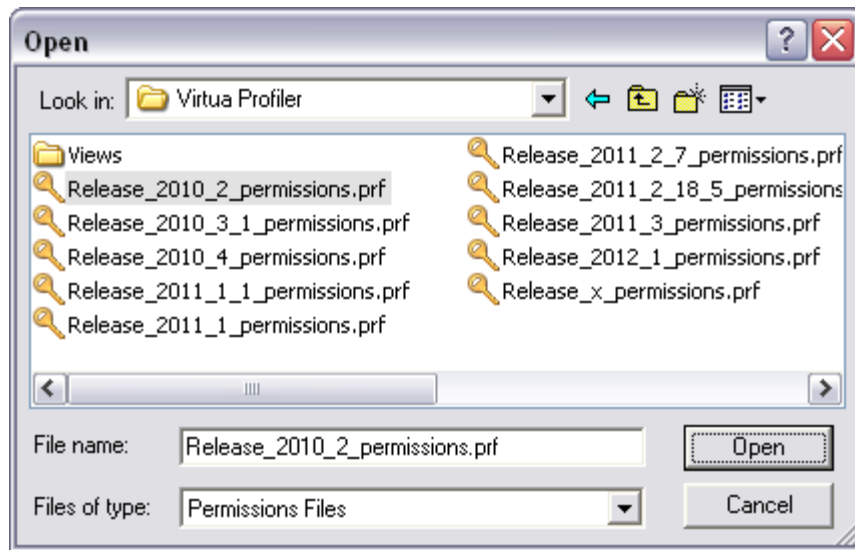


Figure 19-46. Open Dialog Box (Importing User Permissions [Constructive])

The **Release xx_x permissions** file contains the latest permissions for the Virtua client release xx_x.

3. Select the file.
4. Click the Open button.

The following message appears:

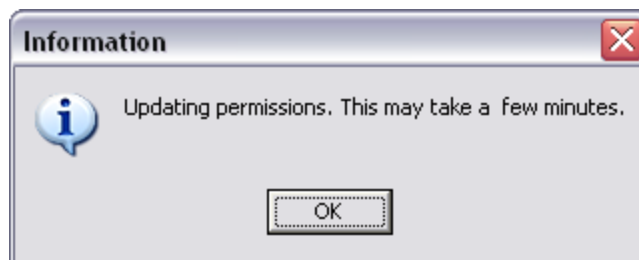
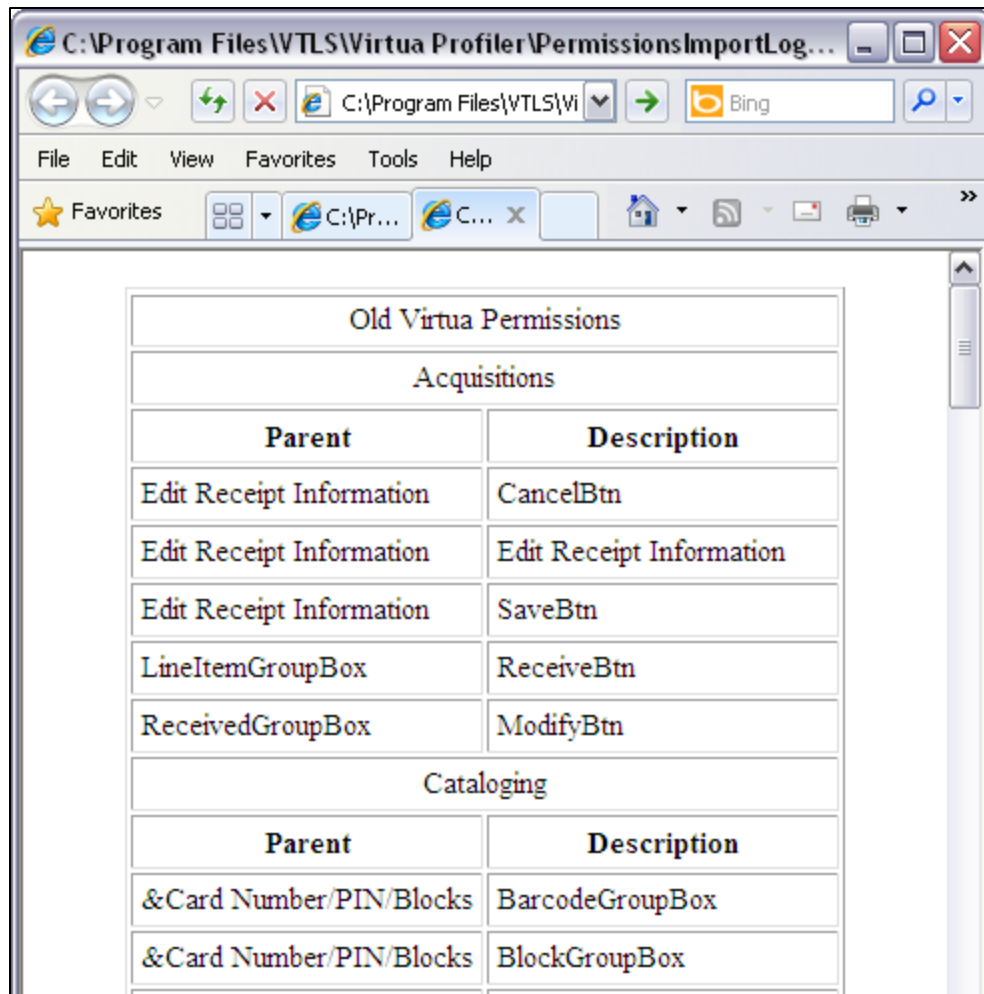


Figure 19-47. Message Displayed When You Begin Importing New Permissions

5. Click OK.


The process of updating the database begins. Depending on the size of the database, it may take several minutes. When Virtua is finished updating the permissions, a browser window opens showing the Permissions changes ([Figure 19-48](#)).



Old Virtua Permissions	
Acquisitions	
Parent	Description
Edit Receipt Information	CancelBtn
Edit Receipt Information	Edit Receipt Information
Edit Receipt Information	SaveBtn
LineItemGroupBox	ReceiveBtn
ReceivedGroupBox	ModifyBtn
Cataloging	
Parent	Description
&Card Number/PIN/Blocks	BarcodeGroupBox
&Card Number/PIN/Blocks	BlockGroupBox

Figure 19-48. Permission Changes Window

The browser window displays permissions that will be removed from the database (old permissions) and permissions that will be added to the database (new permissions). After you have completed the import procedure, you will need to set values for the new permissions for all the users in the database.

6. To print the contents of the browser window, use the tools in your browser. In Microsoft Internet Explorer, you can begin this process by clicking the Print icon .
7. When the Import New Permissions utility is finished, Virtua prompts you with a Save dialog box so that you can save the report file on your local PC.

Virtua saves the list, completing the update process and returning you to the Virtua Profiler main window.

Note: It is necessary to import new permissions only *once*, for the most recent version, at the end of a multiple upgrade process. For example, say you are upgrading from version 2010.1 to version 2011.1, and then to version 2012.1. When the upgrade to 2012.1 is complete, you will need to import new permissions for version 2012.1 only.

19.5 Configuring the Additional Information Tab

The settings on the Additional Information tab ([Figure 19-49](#)) are *optional* settings that allow you to store additional data about the user in the user profile.

Modify User Documentation User

User Information | Permissions | **Additional Information** | Authentication / Authorization

E-mail: Title:

Institution: Language:

Address: Patron Barcode:

City:

State: Postal Code:

ISO Country:

Telephone: Fax:

Hostnames:

Host IP Addresses:

Add Delete Add Delete

Templates Print Save Cancel

LastModified at 7/5/2012 12:39:26 PM by Root User

Figure 19-49. Additional Information Tab of the Add/Modify User Window

To configure the settings on the Additional Information tab,

1. In the E-mail text box, type the e-mail address for this user.
2. In the Title text box, type the title associated with this user.
3. In the Institution text box, type the institution with which this user is associated.
4. In the Language text box, type the language that is primarily used by this user.
5. In the Patron Barcode text box, type the patron barcode associated with this user.
6. In the Address text box, type the street address associated with this user.
7. In the City text box, type the city associated with this user.

8. In the State text box, type the state associated with this user.
9. In the Postal Code text box, type the postal code associated with this user.
10. Using the ISO Country drop-down list, select the ISO country associated with this user. The list box contains a list of all ISO countries configured in the ISSN Countries parameter. For details, see the *ISSN Centre User's Guide*.
11. In the Telephone text box, type the telephone number for this user.
12. In the Fax text box, type the fax number for this user.
13. In the Hostnames list, enter the hostnames from which the user is allowed to log in.

Note: If no hostnames are specified, the user can log in from any hostname that is not restricted by the settings in the Host IP Addresses list.

- To add a hostname, click the Add button and type the hostname into the new line that appears in the list. You must enter the exact hostname; no wildcard characters may be used. If the hostname entry begins with a period (i.e., *.library.iii.com*), any host from the *library.iii.com* domain will be allowed.
- To delete a hostname, highlight the desired hostname in the list and click the Delete button.

14. In the Host IP Addresses list, enter the IP addresses from which the user is allowed to log in. The Host IP Addresses list can contain single IP addresses, IP address ranges, or IP address patterns.

Note: If no IP addresses or address ranges are specified, the user can log in from any IP address that is not restricted by the settings in the Hostnames list.

- To add a single host IP address, click the Add button to display the Add IP Hosts window (Figure 19-50). Select the Single/Pattern check box. Type the IP address into the provided text boxes and click the Save button to close the Add IP Hosts window. The new host IP address is displayed in the Host IP Addresses list.
- To add an IP address pattern, click the Add button to display the Add IP Hosts window (Figure 19-50). Select the Single/Pattern check box. Using the asterisk (*) as a wildcard character (i.e., 198.17.*.*), type the IP address pattern into the provided text boxes. Click the Save button to close the Add IP Hosts window. The new IP address pattern is displayed in the Host IP Addresses list.
- To add an IP address range, click the Add button to display the Add IP Hosts window (Figure 19-50). Select the Group check box. In the text boxes labeled *First*, type the IP address that marks the beginning of the range. In the text boxes labeled *Last*, type the IP address that marks the end of the range. Click the Save button to close the Add IP Hosts window. The new IP address range is displayed in the Host IP Addresses list.
- To delete an IP address or IP address range, highlight the desired line in the list and click the Delete button.

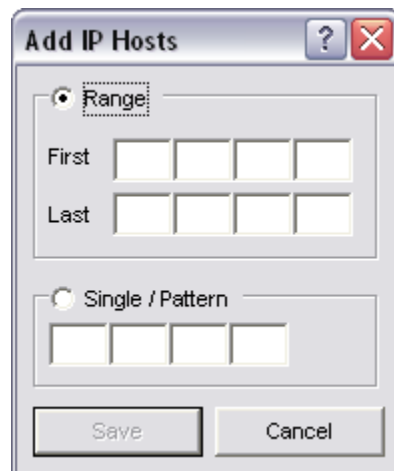


Figure 19-50. Add IP Hosts Window

15. When you are finished configuring the settings on the Additional Information tab,

- Click one of the other tabs on the Add/Modify User window to continue configuring the user profile. See the sections “[Configuring the User Information Tab](#),” “[Configuring User Permissions](#),” and “[Configuring the Authorization Tab](#)” in this user’s guide.
- OR-
- Click the Save button.

The new user profile is saved to the database.

19.6 Configuring the Authentication/Authorization Tab

The Authentication/Authorization tab (*Figure 19-51*) allows you to...

- Specify methods of authentication.
- Specify the period for which the user profile is valid.
- Specify a locked user account.
- Determine whether the user can access Virtua via select modules.
- Configure limits to apply to this user.
- Flag this user as an Acquisitions Super User.

Figure 19-51. Authorization Tab of Add/Modify User Window

To configure the settings on the Authentication/Authorization tab,

1. In the Password text box, type a password for the user. This is the password that the user will enter at log-in. The password is alphanumeric and case-sensitive.

Note: This password is not used if the LDAP Authenticated check box is selected. For LDAP-authenticated users, the password entered at log-in is authenticated against an LDAP server, rather than against the Password field.

Important: Once a password is saved, it is encrypted. This means that you cannot find it in the database. The only way to recover from a lost password is to set a new one.

2. In the Confirm Password text box, re-type the password that you typed in the Password text box.
3. To permit the user to change his or her password from the Virtua client, select the *User can change password* check box.
 - If the check box is selected, the user password may be changed via the Password Change window in the client, without accessing the user profile in the Profiler.
 - If the check box is NOT selected, only an administrator may change the user password, by modifying the Password setting described above. For details on the Password Change window, see the *Virtua Client Getting Started Primer*.
4. To specify the period after which the user password expires and must be reset, select the *Set expiration time* check box. Selecting this check box enables the following two fields beside it:
 - **Days between expirations** - This text box allows you to specify the number of days until the user's password expires. The default value is 90. If a value less than one or a non-numeric value is entered, the value is immediately changed to 90.

Note: If the *Set expiration time* check box is not selected, the user's password does not expire.

- **Days until next expiration** - Only the field label becomes enabled. The field itself is non-editable and displays the number of days that currently remain until the user's password expires.
5. To have the user's password expire immediately upon saving the user profile, select the *Password expires immediately* check box. Selecting this check box automatically selects the *User can change password* and *Set expiration time* check boxes. In this way, the next time the user logs in, their password will be expired, and the system will prompt the user to change their password, which they can do from the client. Virtua will start counting down the number of days until the new password expires as defined in the *Days between expirations* text box, and will de-select the *Password expires immediately* check box.

Note: If a user's password has expired due either to a legitimate expiration or because the *Password expires immediately* check box was selected previously and the user has not yet reset the password, then the *Password expires immediately* check box will be checked. De-selecting the check box and saving the user profile will have the effect of un-expiring the password.

6. If you want to enable LDAP authentication for this user, select the LDAP Authenticated check box. When this check box is selected, the password that this

user enters at log-in is authenticated against an LDAP server rather than against the Password field. For more information on LDAP user authentication, see the section “[Working with the LDAP Options Parameter](#)” in this user’s guide.

7. If you have enabled LDAP authentication and you want to specify the LDAP group to which this user belongs, type the desired group name into the LDAP Group text box.

Note: The structure of your LDAP directory determines whether you will need to enter an LDAP group. For details, see the section “[Specifying an LDAP Group](#)” in this user’s guide.

8. If you wish to let the user sign in to the database automatically using the Username only option of the Automatic Login feature, leave the Password field blank. For more information on Automatic Login in the Virtua client, see the *Getting Started with the Virtua Client Primer*.
9. Using the pop-up calendar setting labeled *Valid from*, select the date upon which you want this user profile to become valid (i.e., the start of this user’s valid period).
10. Using the pop-up calendar setting labeled *Valid to*, select the date upon which you want this user profile to become invalid (i.e., the end of this user’s valid period).

Note: Virtua checks the *Valid from* and *Valid to* dates as part of the authentication process when a user logs in to the Virtua client. If the valid period has elapsed, an error message is displayed and the user is not allowed to log in to Virtua.

11. To give this user Acquisitions Super User privileges, check the *Acquisitions super user* check box. A Super User is granted special access to perform acquisitions transactions for locations to which they are not currently logged in.

Note: Super Users may perform acquisitions transactions at different locations *without* manually changing the log-in location via the Virtua client’s Change Location feature. However, Super Users are still limited to performing acquisitions transactions only at valid log-in locations, as specified on the User Information tab of the user profile. For more information, see the *Virtua Acquisitions User’s Guide*.

12. To lock this user’s account and prevent the user from logging in to the Virtua client, select the Account Locked check box.

Note: A user’s account may be locked – and the Account Locked check box selected – automatically if the user has exceeded the *Number of log-in attempts before*

account is locked value. For details, see the section “[About Specifying the Number of Failed Log-ins Before the User Account is Locked](#)” in this user’s guide.

-OR-

To unlock the user’s account and permit the user to log in to Virtua, de-select the Account Locked check box.

13. In the Authorized Modules box, select the **External Z39.50** check box if you want the user to be able to log in to the system using an external Z39.50 client.
14. In the Counters/Limits box, specify the Interactions limit for this user. To specify the limit, type the number of interactions that are allowed for the user in the Interactions text box. Virtua increments the Interactions counter each time the user . . .
 - Executes a search (regardless of whether the search is successful).
 - Accesses the List of Titles window.
 - Views a record directly from the Browse search results list (i.e., without the List of Titles window being displayed).

Note: The gray field next to the Interactions text box displays a count of the number of interactions performed by this user to date.

15. In the Counters/Limits box, specify the Z39.50 Downloads limit for this user. To specify the limit, type the number of Z39.50 downloads that are allowed for this user in the Z39.50 Downloads text box. Virtua increments the Z39.50 Downloads counter . . .
 - Once for each record that is displayed when the user accesses the List of Titles window.
 - Once each time the user views a record.

Note: The gray field next to the Z39.50 Downloads text box displays the number of Z39.50 downloads performed by this user to date.

16. In the Counters/Limits box, specify the Maximum Simultaneous Sessions limit for this user. To specify the limit, type the number of maximum simultaneous sessions that are allowed for this user in the Max. Simultaneous Sessions text box.

Note: When a user logs off a session in the client, it takes 60 seconds for the session to be considered released. Thus, if a user's maximum simultaneous sessions limit is 1, and the user logs in to the client and then logs off, the user will not be able to log back in until 60 seconds have elapsed.

17. When you are finished configuring the settings on the Authentication/Authorization tab,

- Click one of the other tabs on the Add/Modify User window to continue configuring the user profile. See the sections “[Configuring the User Information Tab](#),” “[Configuring User Permissions](#),” and “[Configuring the Additional Information Tab](#)” in this guide.
- OR-
- Click the Save button.

The new user profile is saved to the database.

19.7 Working with User Profile Templates

The Manage User Templates window allows you to add and delete user profile templates and apply existing templates to user profiles. User profile templates consist of specific user profile settings.

The following sections describe . . .

- Aspects of the user template.
- How to add a new user template.
- How to delete a user template.
- How to apply settings from a user template to a user profile.

19.7.1 Aspects of the User Profile Template

A user template is based on certain settings configured in an existing user profile. The template lets you apply the settings for an existing user profile to another user profile.

A user template consists of the following settings from the user profile:

- Login Locations
- Member Groups
- ISO Country
- User Type (for ISSN Centre users only)
- Authorized Modules
- Counters / Limits

Note: The user template contains ONLY the settings listed above. You must configure the other settings in your new user profile as usual.

19.7.2 Adding a User Profile Template

To add a new user template,

1. Navigate to the Add/Modify User window ([Figure 19-9](#)) of the user profile from which you want to create a user template.
2. Click the Templates button.

The Manage User Templates window appears ([Figure 19-52](#)).

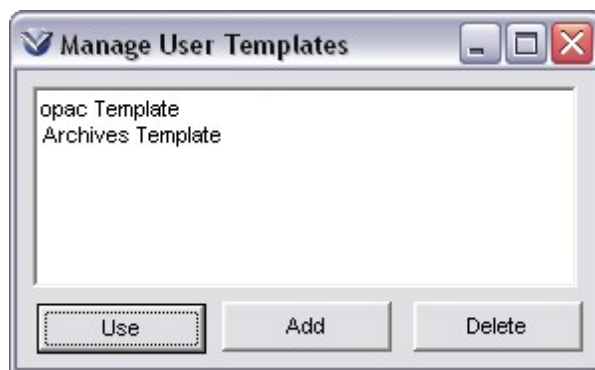


Figure 19-52. Manage User Templates Window

3. Click the Add button.

A new line appears in the list ([Figure 19-53](#)).

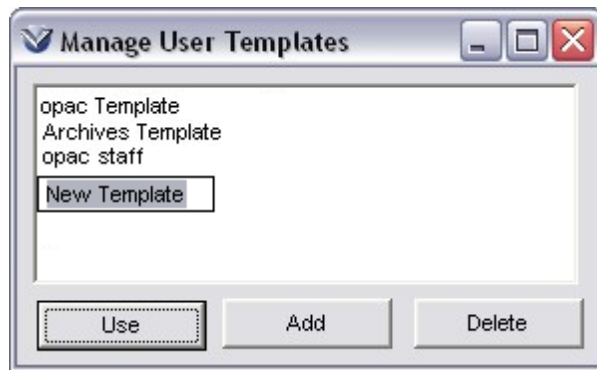


Figure 19-53. Manage User Templates Window

4. Click on the new line and enter a name for the new user template.

The new template is added, based on settings from the current user profile.

5. Close the window to return to the current user profile.

19.7.3 Deleting a User Profile Template

To delete a user template,

1. On the Add/Modify User window, click the Templates button.

The Manage User Templates window appears, displaying a list of the user templates that have already been added ([Figure 19-54](#)).

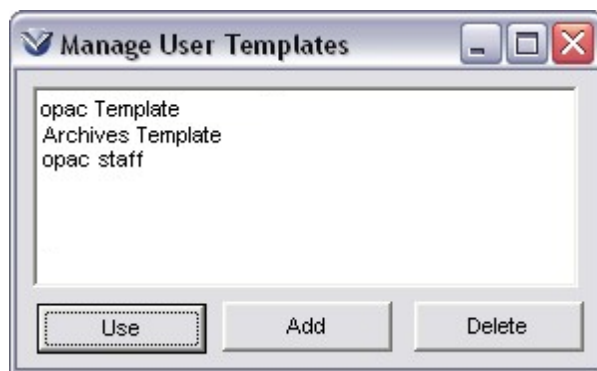


Figure 19-54. Manage User Templates Window

2. Highlight the user template you want to delete.

3. Click the Delete button.

A pop-up message appears, asking you to confirm that you want to delete the user template (*Figure 19-55*).

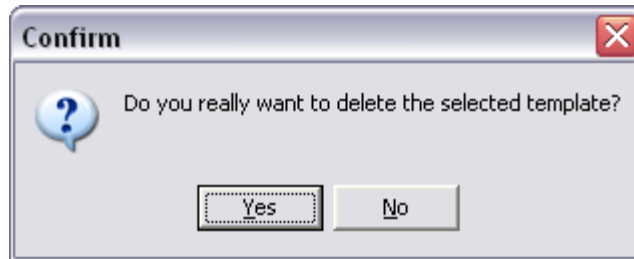


Figure 19-55. Deleting User Templates - Confirmation Message

4. Click the Yes button.

The user template is deleted from the list.

5. To delete additional user templates, repeat steps 2 and 3.

-OR-

To return to the current user profile, close the window.

19.7.4 Applying a User Template to a User Profile

To apply a user template to a user profile,

1. Navigate to the Add/Modify User window of the user profile *to which* you want to apply settings from a user template.

Note: You can apply settings from a user template to a new user profile OR to an existing user profile.

2. Click the Templates button.

The Manage User Templates window appears, displaying a list of the user templates that have already been added (*Figure 19-54*).

3. Highlight the user template you want to apply to the current user profile.
4. Click the Use button.

A pop-up message appears, asking you to confirm that you want to apply the selected user template to the current user profile ([Figure 19-56](#)).



Figure 19-56. Applying User Templates - Confirmation Message

5. Click the Yes button.

The user template settings are applied to the current user profile.

6. Close the Manage User Templates window to return to the current user profile.

20. Appendix A - Parameters Specific to the Hong Kong Public Library

20.1 Patron NCOA Updates Parameter

The Patron NCOA Updates parameter lets you determine whether to log NCOA updates, and if so, at what interval to delete the logs.

When NCOA patron update logging is enabled, Chamo will log NCOA update information in the Patron_Detail_v Ad Hoc view.

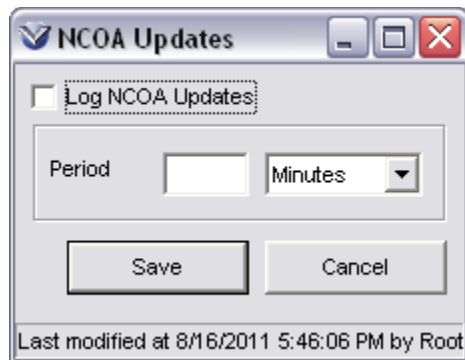


Figure 20-1. NCOA Updates Window

21. Appendix B - Changes in this Guide

21.1 Changes for Version 16.1

No changes were made.

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