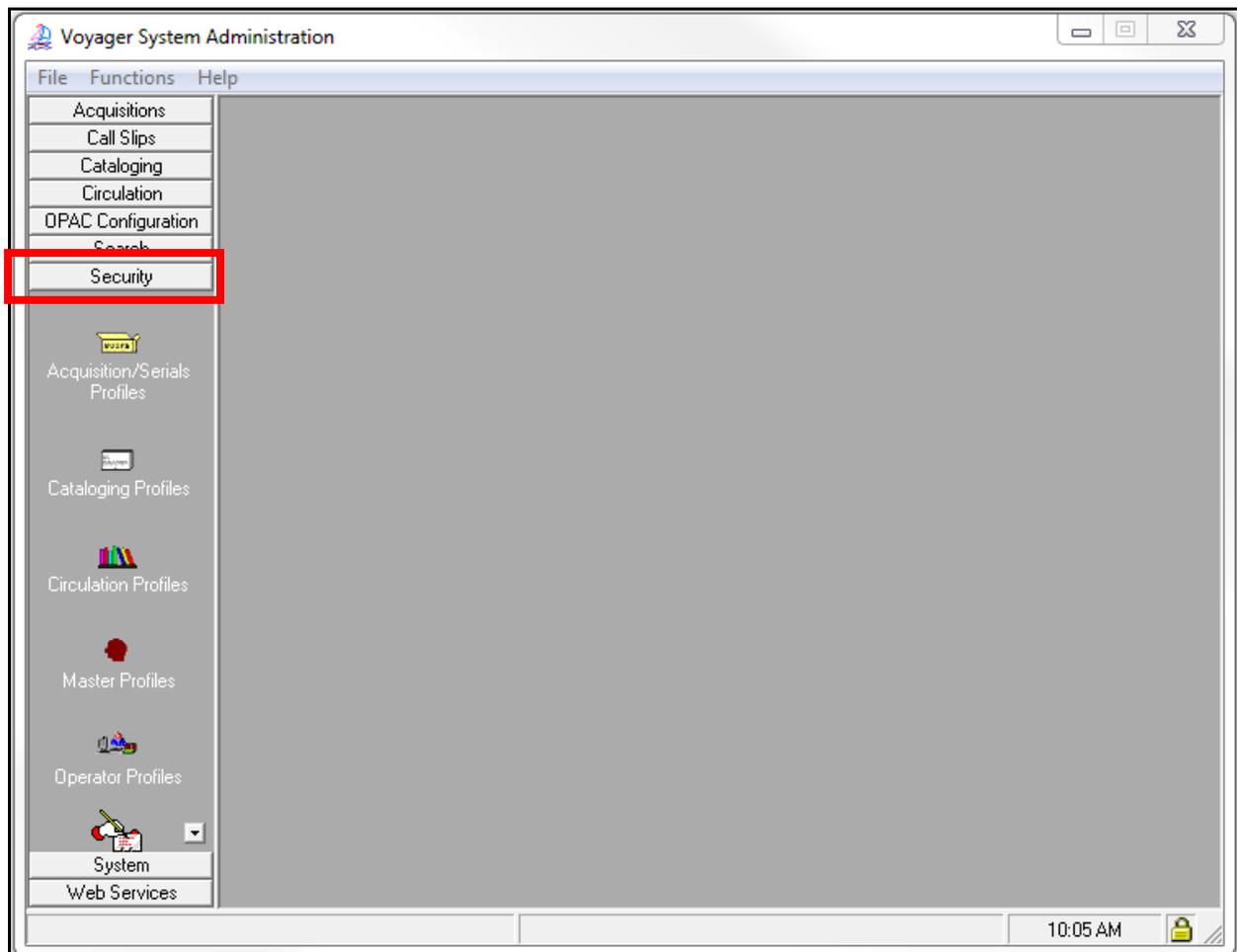


VOYAGER SYSTEM ADMINISTRATION IN I-SHARE LIBRARIES

PART 2: SECURITY



Security System Administration Workspace

Legend:

- ⊕ Consortial Rule for setting value(s)
- ☑ CARLI Recommendation for setting value(s)
- ∅ Does not apply; Or, Do not change this value

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NOTE: Screen shots that appear throughout this document come from a variety of I-Share databases. The settings do not always represent the values your library should be using for your policies.

Page references refer to the *Voyager® 9.1.1 System Administration User’s Guide*.
http://www.carli.illinois.edu/sites/files/i-share/documentation/secure/V_System_Admin_9_1_1.pdf

II. Introduction

This chapter of the I-Share System Administration document is a concise and annotated supplement to the Security portion of the full *Voyager 9.1.1 System Administration User’s Guide*. Use this document to learn the I-Share consortial requirements and recommendations for the settings in the Security portion of Voyager System Administration to guide your profiling and configuring in Voyager.

The *Voyager 9.1.1 System Administration User’s Guide* contains additional information and explanations; consult Chapter 9, page 9-1 through page 9-125 for further detail.

http://www.carli.illinois.edu/sites/files/i-share/documentation/secure/V_System_Admin_9_1_1.pdf

The sections in this chapter are arranged in the order that they should be edited when a library is first implementing Voyager as an I-Share participant. Some parts of Security SysAdmin build upon each other, so doing the initial data entry work in the order outlined in this document should make this process more efficient for library staff.

Legend:

- ⊕ Consortial Rule for setting value(s)
- ☑ CARLI Recommendation for setting value(s)
- ∅ Does not apply; Or, Do not change this value

III. Security Overview

The different sections of Security are listed below in the order they appear on the screen when SysAdmin> Security is opened. Each section will be described in subsequent sections of this chapter in the order they should be edited by a library first implementing Voyager.

 Acquisition/Serials Profiles	Acq/Serials Profiles	This section determines to whom you give various Acquisitions/Serials privileges and for which location(s).
 Cataloging Profiles	Cataloging Profiles	This section determines to whom you give various Cataloging privileges and for which location(s).
 Circulation Profiles	Circulation Profiles	This section determines to whom you give various Circulation privileges and for which location(s).
 Master Profiles	Master Profiles	This section determines to whom you give various System Administration editing privileges.
 Operator Profiles	Operator Profiles	In this section you establish Individuals' names or Generic Account names, e.g., Melvil Dewey, Circ Clerk, circstudent.
 Global Data Change Profiles	Global Data Change Profiles	Not in use. This section determines to whom you give various Global Data Change privileges.
 Security Options	Security Options	This section allows you to implement password requirements for operators at your library.

New I-Share libraries should start by editing the Security Options in SysAdmin> Security, then next creating the Operator Profiles. Once the Operators are defined, the next step is to create the different Profiles in each functional area (e.g., Cataloging Profiles, Circulation Profiles, and Acquisitions Profiles) that determine the level of privileges within each Voyager client.

An individual Operator can be included in only one profile within each of the four functional areas.

- For example, Melvil Dewey's Operator ID cannot be linked to both a "Copy Cataloging" and "Cataloging Supervisor" Cataloging Profile.
- However, Melvil Dewey's Operator ID can be linked to both a "Cataloging Supervisor" Cataloging Profile and "Circulation Supervisor" Circulation Profile.

It is possible to have staff with profiles in the Master, Acq/Serials, Cataloging, and/or Circulation categories. Any combination of these types is possible for one Operator.

Review pages 9-4 through 9-9 of the *Voyager 9.1.1 System Administration User's Guide* for more information about the common elements found in all Security Profiles.

Legend:

- ⊕ Consortial Rule for setting value(s)
- ☑ CARLI Recommendation for setting value(s)
- ∅ Does not apply; Or, Do not change this value

The information about creating Master Profiles is found at the end of this chapter because it is different from the rest of SysAdmin Security. Master Profiles determine the permissions for the System Administration module itself. Master Profiles are very powerful and should be carefully assigned.

IV. Security Options

The Security Options section allows you to implement password requirements for operators at your library. A few password minimum requirements are set; these requirements apply to any NEW or CHANGED password.

A. Password Requirements Tab

The screenshot shows the 'Security - Security Options' dialog box in the Voyager System Administration application. The 'Password Requirements' tab is active. The interface includes a left-hand navigation pane with options like Acquisitions, Call Slips, Cataloging, Circulation, OPAC Configuration, Search, Security, Circulation Profiles, Master Profiles, Operator Profiles, Global Data Change Profiles, Security Options, System, and Web Services. The main area contains the following settings:

- Password Requirements:**
 - New password cannot be same as previous: 3 passwords
 - Minimum password age: 0 Days
 - Maximum password age (expiration): 0 days
 - Alert user: 0 days before password will expire
- Password Length:**
 - Minimum - at least: 8
 - Maximum - at most: 25
- Password may contain:**
 - User's Id
 - User's name
- Password must contain:**
 - All requirements below
 - At least 1 of the requirements selected below
 - At least 0 alphabetic character(s)
 - At least 0 uppercase character(s)
 - At least 0 lowercase character(s)
 - At least 0 number character(s)
 - At least 0 special character/symbol(s)
 - Special / symbols: !@#\$%^&*~!.,=-,

Buttons for 'Save' and 'Cancel' are located at the bottom of the dialog box. The status bar at the bottom shows 'Security: Security Options' and the time '2:15 PM'.

Security- Security Options- Password Requirements Tab

Review pages 9-118 through 9-123 of the *Voyager 9.1.1 System Administration User's Guide* for more information about the Security Options> Password Requirements Tab.

Libraries can determine which password requirements they want to require for their library staff member's operator passwords.

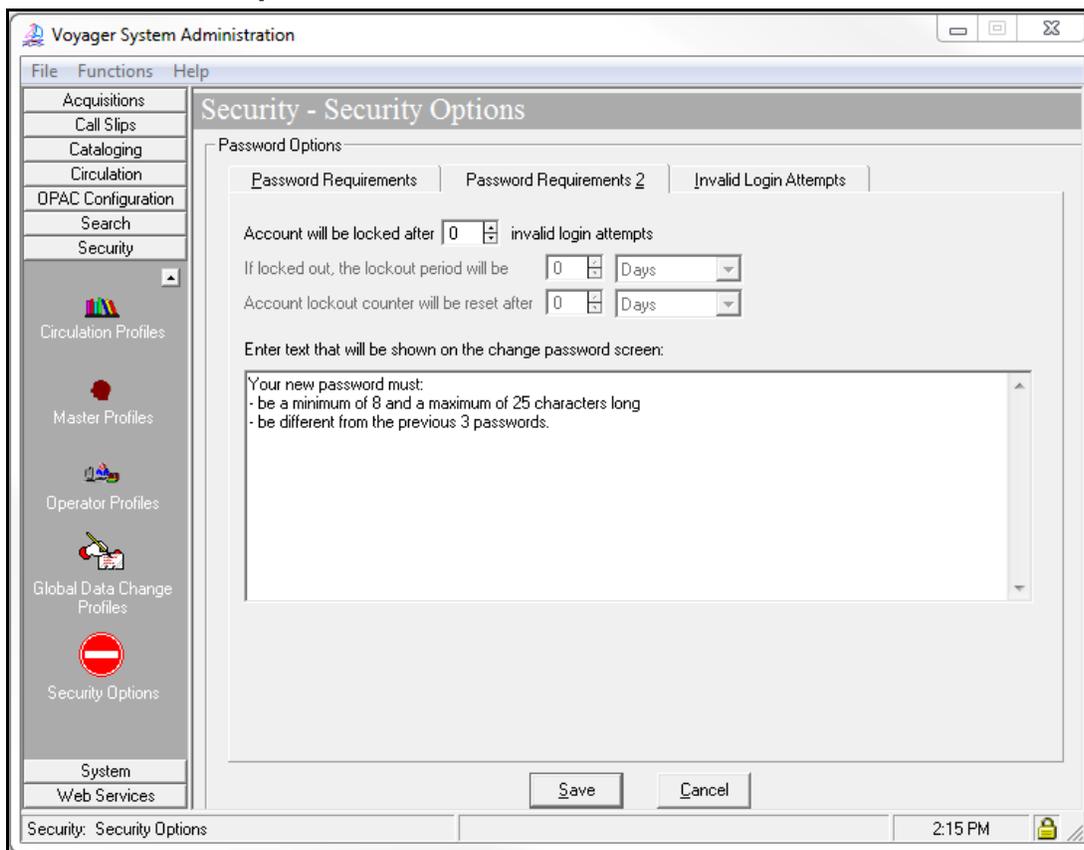
The options are granular in terms of number of alphanumeric, specific case, and special characters; password length; password age; and the ability to contain the operator's name or username.

The only required setting is password length.

Legend:

- ⊕ Consortial Rule for setting value(s)
- ☑ CARLI Recommendation for setting value(s)
- ∅ Does not apply; Or, Do not change this value

B. Password Requirements 2 Tab



Security- Security Options- Password Requirements 2 Tab

Review pages 9-123 through 9-124 of the *Voyager 9.1.1 System Administration User's Guide* for more information about the Security Options> Password Requirements 2 Tab.

Library staff members can change their passwords from within the File Menu of each Voyager client.

- This option does not allow staff members who have forgotten their password to reset it; rather, it allows a staff member who is unsatisfied with their known password to update it, or whose password is set to expire to change it before it does expire.

Most I-Share libraries have a balance of generic and user-specific usernames and passwords (operators).

- Voyager does not discriminate between which usernames can have the passwords changed in the clients. It would be possible for a single library staff member to change the password for one of the generic accounts, for example, "Circstudent".
- Should this happen, a Voyager System Administrator with Master Profile- Security (add, edit, delete) privileges retains the ability to update the password from within the SysAdmin client.

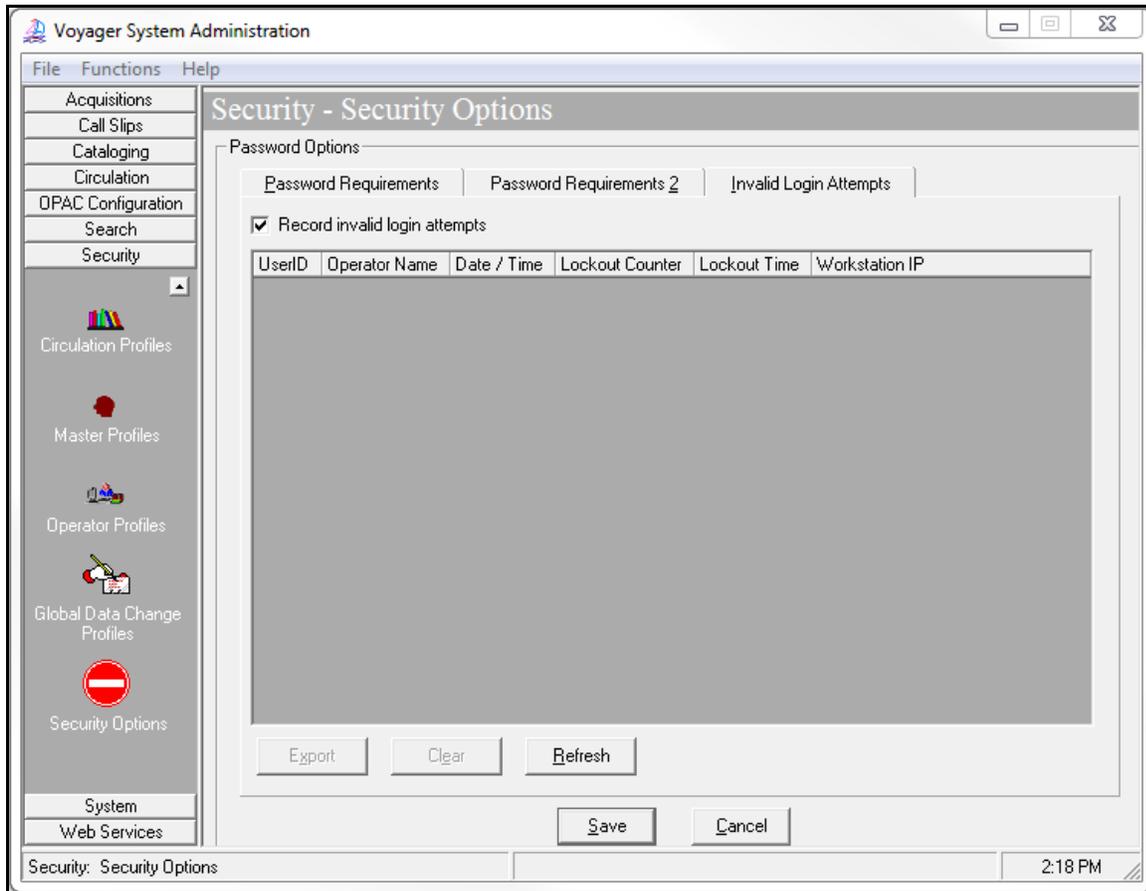
On this tab:

- Enter the text shown on the password change screen in the Voyager clients. You can edit the warning to be appropriate for your library; the same warning shows in all Voyager clients.
- Choose whether an operator will be blocked (and for how long) following incorrect/invalid login attempts. Zero (0) invalid login attempts means that the username will not be blocked.

Legend:

- ⊕ Consortial Rule for setting value(s)
- ☑ CARLI Recommendation for setting value(s)
- ∅ Does not apply; Or, Do not change this value

C. Invalid Login Attempts Tab



Security- Security Options- Blank Logs, Invalid Login Attempts Tab

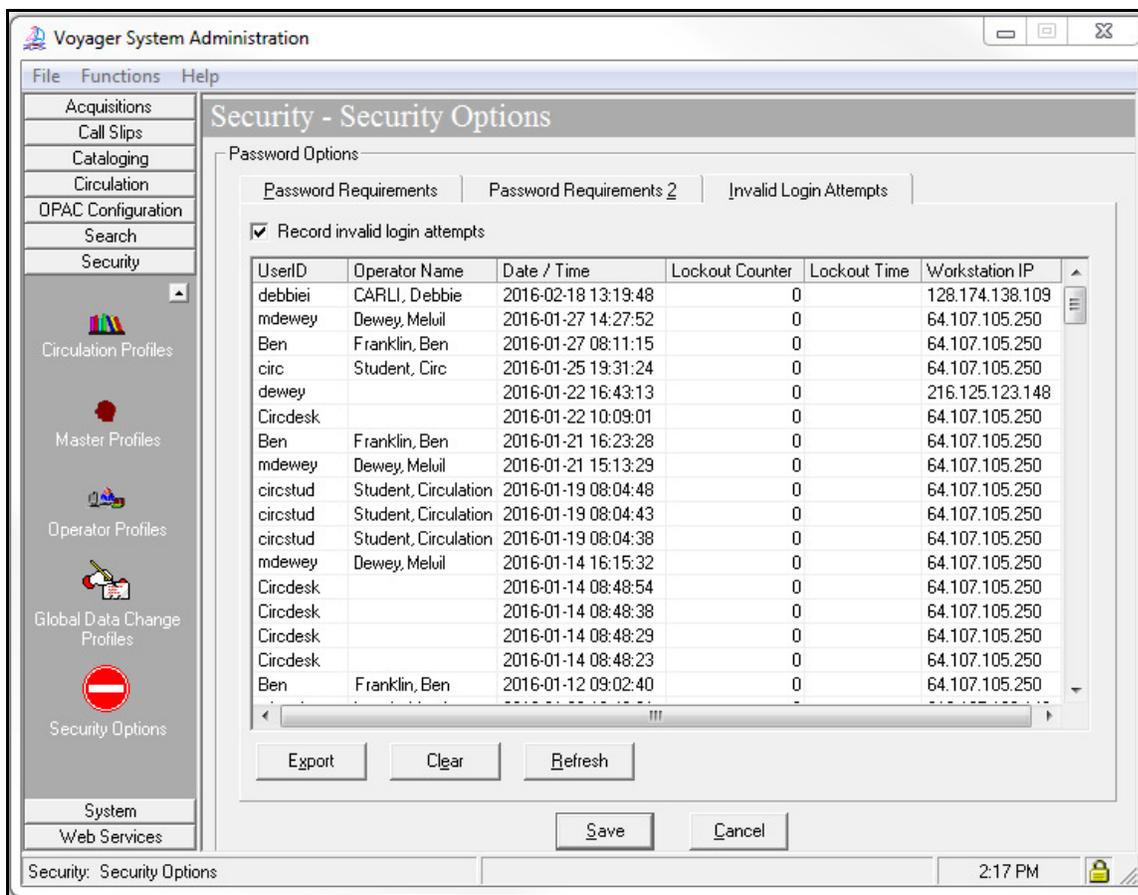
Review pages 9-124 through 9-125 of the *Voyager 9.1.1 System Administration User's Guide* for more information about the Security Options> Invalid Login Attempts Tab.

The Invalid Login Attempts Tab records invalid login attempts (incorrect username or password).

The "Record invalid login attempts" checkbox is checked by default. Uncheck the checkbox if you do not wish to log this information.

Legend:

- ⊕ Consortial Rule for setting value(s)
- ☑ CARLI Recommendation for setting value(s)
- ⊘ Does not apply; Or, Do not change this value



Security- Security Options- Example logs, Invalid Login Attempts Tab

A few comments about the logs:

- The logs can be useful when library staff report login issues.
 - If the Operator Name column is blank, it means the entered UserID did not match an existing Operator, so the entered username was incorrect.
 - If the Operator Name column contains a name, it could either mean that the library staff member entered the incorrect password, or their account was already locked from previous login errors. Check the Lockout Counter column for the latter.
- The data from the log can be exported to Excel for local evaluation, if desired.
- You can clear the log as desired using the "Clear" button.
- You may occasionally see CARLI Staff usernames in the list ☺

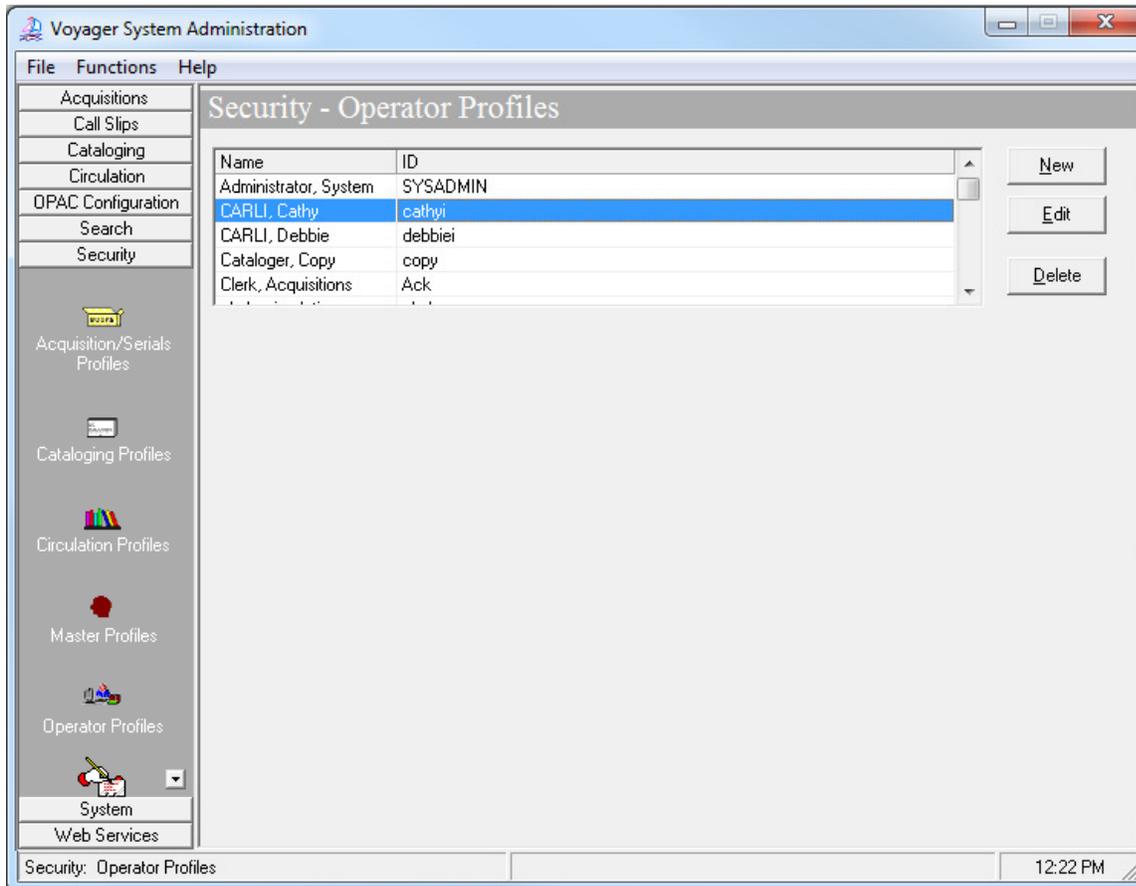
Legend:

- ⊕ Consortial Rule for setting value(s)
- ☑ CARLI Recommendation for setting value(s)
- ∅ Does not apply; Or, Do not change this value

V. Operator Profiles

Libraries performing their initial SysAdmin work for Security should next create *Operator Profiles* (i.e., accounts, or aka usernames/passwords) for all appropriate staff in the library.

⊕ **Libraries should create as many Operator accounts as needed to support local operations.**



Security- Operator Profile Workspace

When you click the *Operator Profiles* icon, the display includes both the full name and the login ID (username) for the accounts created previously.

Review pages 9-15 through 9-23 of the *Voyager 9.1.1 System Administration User's Guide* for more information about Operator Profiles.

Legend:

- ⊕ Consortial Rule for setting value(s)
- ☑ CARLI Recommendation for setting value(s)
- ⊘ Does not apply; Or, Do not change this value

Overview

Your library can create a unique operator for each individual staff member, or you can create generic operators used by multiple staff members. You can also combine both approaches.

- Balance the security needs and the transaction history functions in Voyager with the effort required to maintain the operator accounts.
- CARLI recommends that functional area profiles with higher levels of privileges be linked to individual operator accounts rather than generic accounts.

Information about Specific Operators in Voyager

∅ When Ex Libris (ExL) creates a new Voyager database, Ex Libris staff add a default operator of "SYSADMIN".

- This operator is intended for use by ExL staff only; most of its values cannot be edited.
- CARLI staff will change the default password associated with the SYSADMIN operator upon the library's formal acceptance of their production bib load.
- ∅ Do NOT change the password for the SYSADMIN operator locally.

⊕ When Ex Libris (ExL) creates a new Voyager database, they usually add two operators for the data review process: "test" and "demo."

- ⊕ You should delete these two operators once the library is live in production for all modules.
- ExL uses the same Operator ID and password for these accounts for all Voyager customers, and as a result, these Operators are inherently insecure and should be deleted.

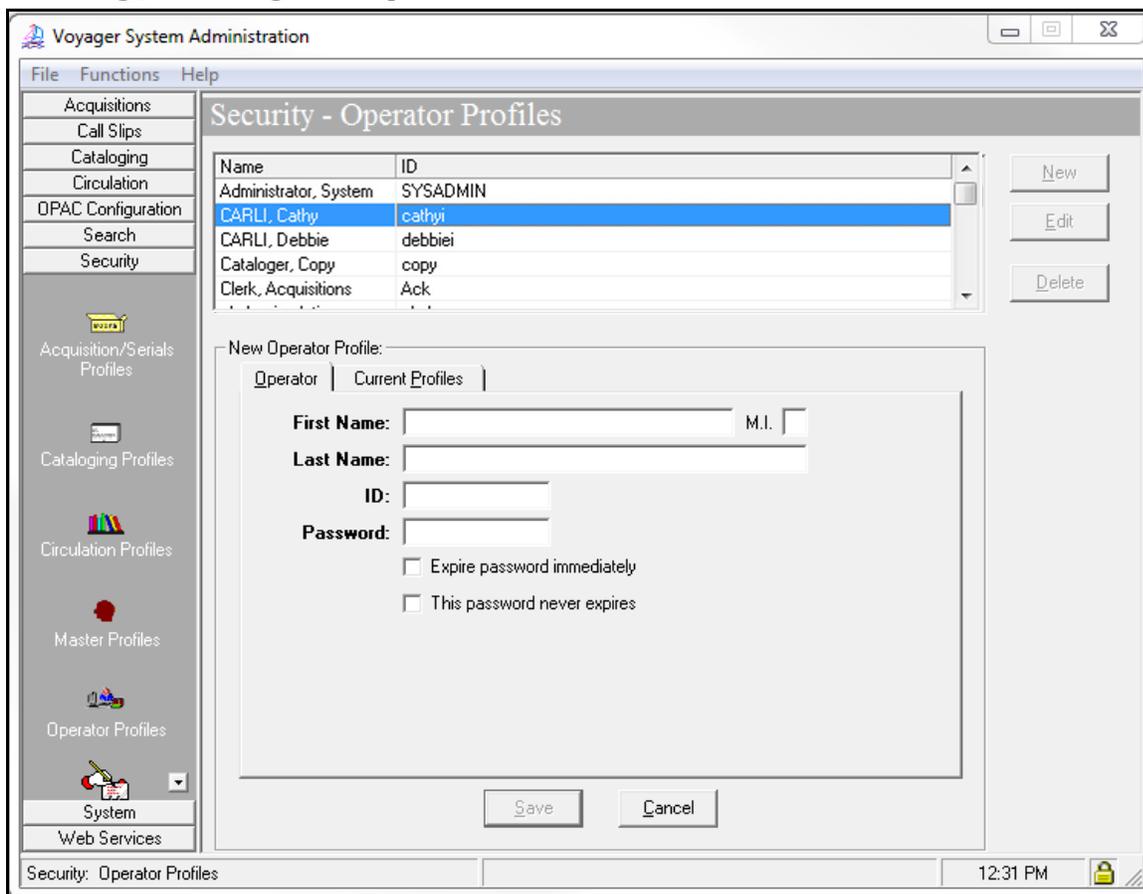
∅ CARLI staff will create operators in each I-Share library's database to be used by CARLI staff only, for troubleshooting purposes.

- ∅ Do NOT edit any operators with a last name of "CARLI" (or "ILCSO" in older I-Share databases), including editing or deleting any profiles to which these operators are linked.

Legend:

- ⊕ Consortial Rule for setting value(s)
- CARLI Recommendation for setting value(s)
- ∅ Does not apply; Or, Do not change this value

Adding/Editing an Operator



Security- Operator Profiles- New Profile, Operator Tab

In Voyager SysAdmin> Security> Operator Profiles

- To Add a new operator, click [New].
- To Edit an existing operator's record, highlight the name and click [Edit].
- To Delete an operator, highlight the name and click [Delete].

Adding a New Operator:

1. On the Operator tab, enter the operator information:
 - Each of these may include alphanumeric characters, punctuation, and spaces.
 - Alphabetic characters are case-sensitive (e.g., mdewey is different from MDewey).
 - First Name (25 characters maximum)
 - Middle Initial, if desired (1 character maximum)
 - Last Name (25 characters maximum)
 - ID (10 characters maximum; this is the username that the operator enters when logging into Voyager)
 - Password (minimum of 8 characters, maximum of 25 characters); other criteria may apply as set in the SysAdmin> Security> Security Options section.
 - Decide whether the checkboxes for *Expire password immediately* or *This password never expires* should be checked.

Legend:

- ⊕ Consortial Rule for setting value(s)
- ☑ CARLI Recommendation for setting value(s)
- ∅ Does not apply; Or, Do not change this value

- *Expire password immediately* forces the staff member to change their password upon their next login to a Voyager client.
- *This password never expires* prevents an operator's password from expiring even if the criteria for expiration set in the *Security Options* have been met (see page 4 of this document).
- When finished entering a new Operator, click [Save].

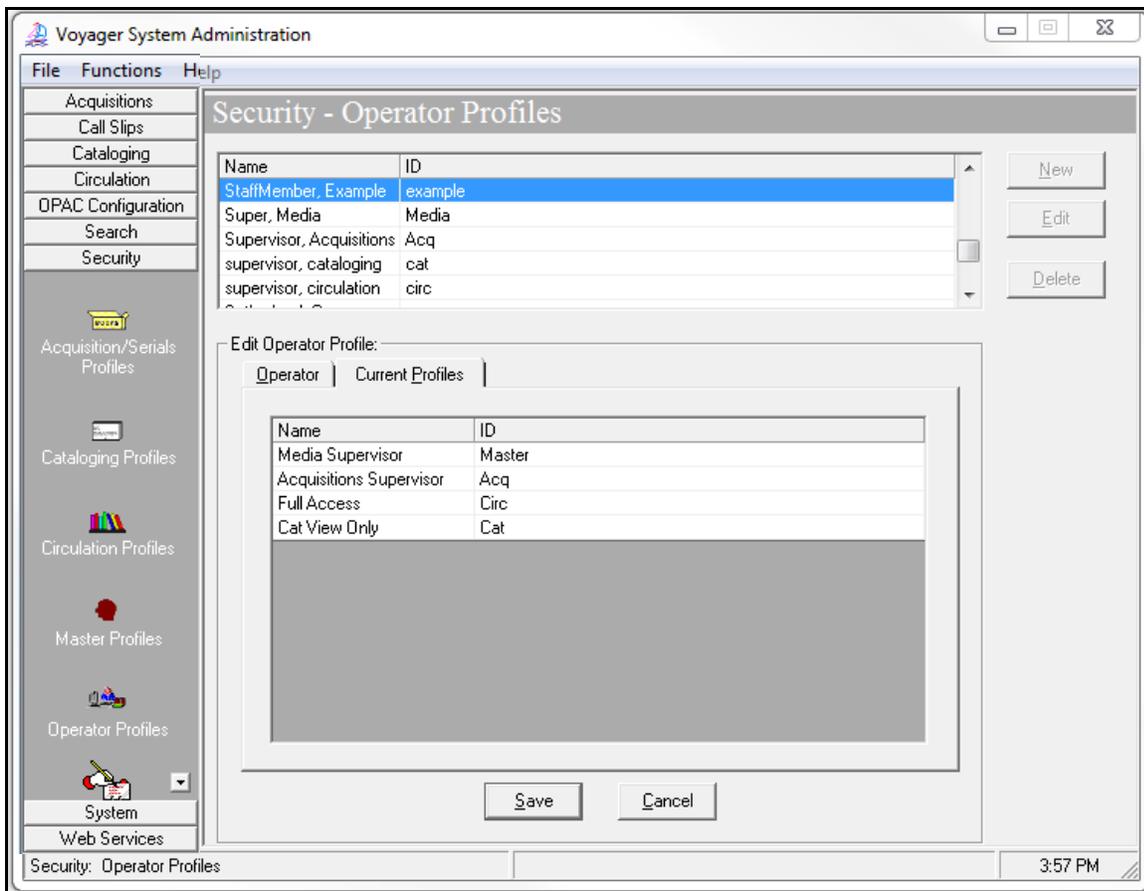
Passwords:

- can be changed by the operator in any Voyager client. The File menu in each client has a "Change Password" option.
- should be changed regularly by your library's Sys Admin person for generic accounts.
- is masked and cannot be viewed within SysAdmin.

Reviewing an Operator's Voyager Permissions

After this Operator is linked with the appropriate functional area profiles, the Current Profiles tab will show the various profiles to which this account is linked.

Check the permissions established by the Operator's assigned profiles to determine that operator's privileges in Voyager. **Note:** Any operator entered in SysAdmin may use the Voyager Slip Daemon or Voyager Reporter Client, even if they have no current Profiles Assigned.



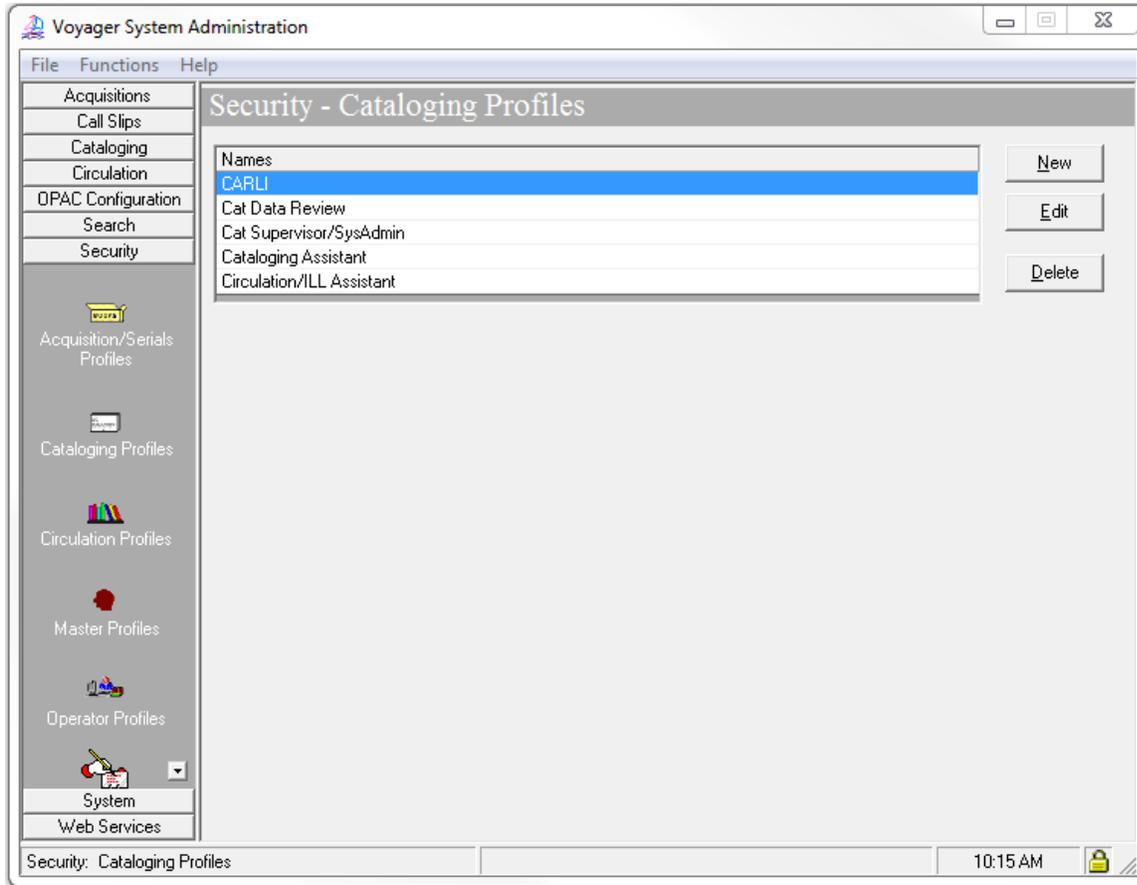
Security- Operator Profiles- Example operator, Current Profiles Tab

Legend:

- ⊕ Consortial Rule for setting value(s)
- ☑ CARLI Recommendation for setting value(s)
- ∅ Does not apply; Or, Do not change this value

VI. Cataloging Profiles

⊕ Libraries should create as many Cataloging Profiles as needed to support local operations.



Security- Cataloging Profile- Current Profiles Tab

Overview

The Cataloging Profiles determine the assigned operators' permissions within the Cataloging Client. You should create cataloging profiles based on levels of permissions. Multiple operators can be assigned to the same Cataloging Profile.

Information about Specific Cataloging Profiles in Voyager

- ⊕ When Ex Libris (ExL) creates a new Voyager database, Ex Libris staff may add a Cataloging Profile called "data review" for the data review process.
 - ⊕ You should delete this Cataloging Profile once the library is in production for Cataloging.
- ∅ CARLI staff will create a Cataloging Profile in each I-Share library's database to be used by CARLI staff only, for troubleshooting purposes.
 - ∅ Do NOT edit any settings in the Cataloging Profile with the name of "CARLI" (or "ILCSO" in older I-Share databases), including editing or adding/deleting any operators linked to these profiles.

Legend:

- ⊕ Consortial Rule for setting value(s)
- ☑ CARLI Recommendation for setting value(s)
- ∅ Does not apply; Or, Do not change this value

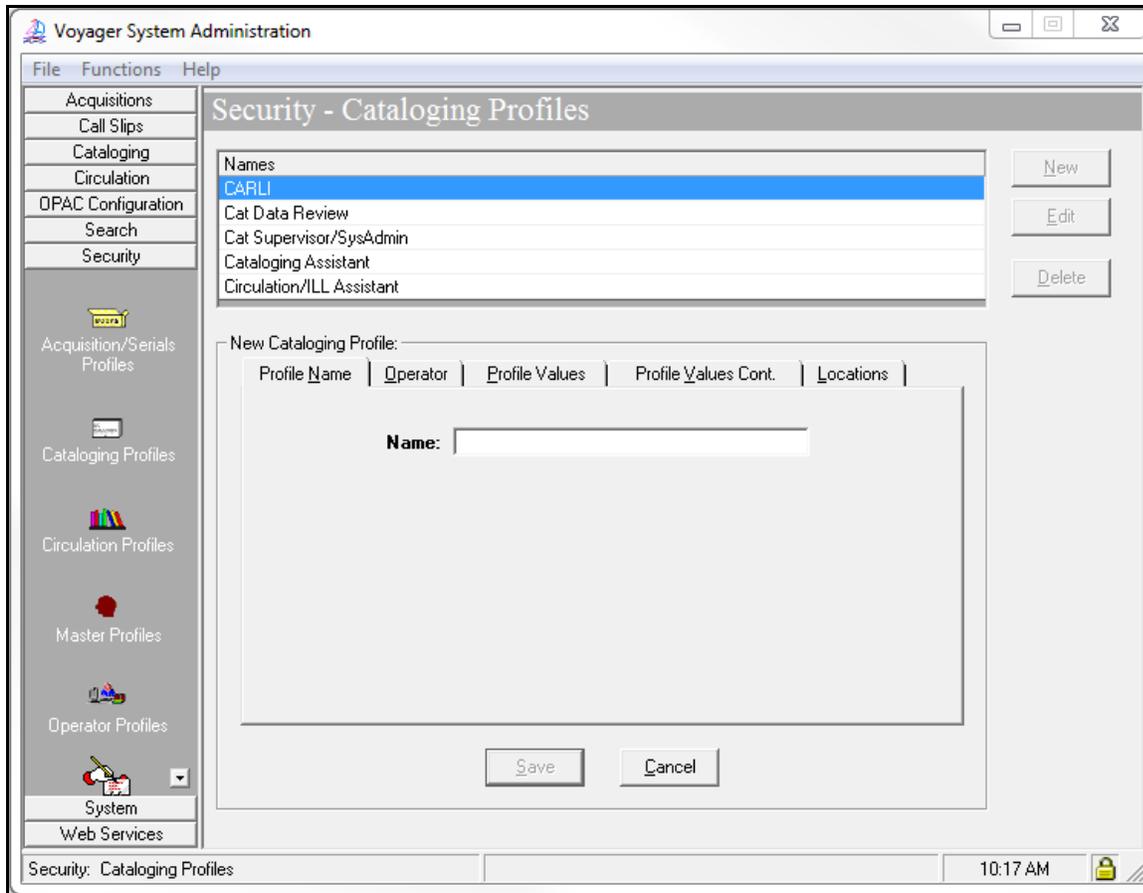
Adding/Editing a Cataloging Profile

In Voyager SysAdmin> Security> Cataloging Profiles

- To Add a new Cataloging Profile, click [New].
- To Edit an existing Cataloging Profile, highlight the name and click [Edit].
- To Delete a Cataloging Profile, highlight the name and click [Delete].

When adding a new Cataloging Profile, complete all 5 tabs in the order described below, and then click [Save].

A. Profile Name Tab



Security- Cataloging Profile- New Profile, Profile Name Tab

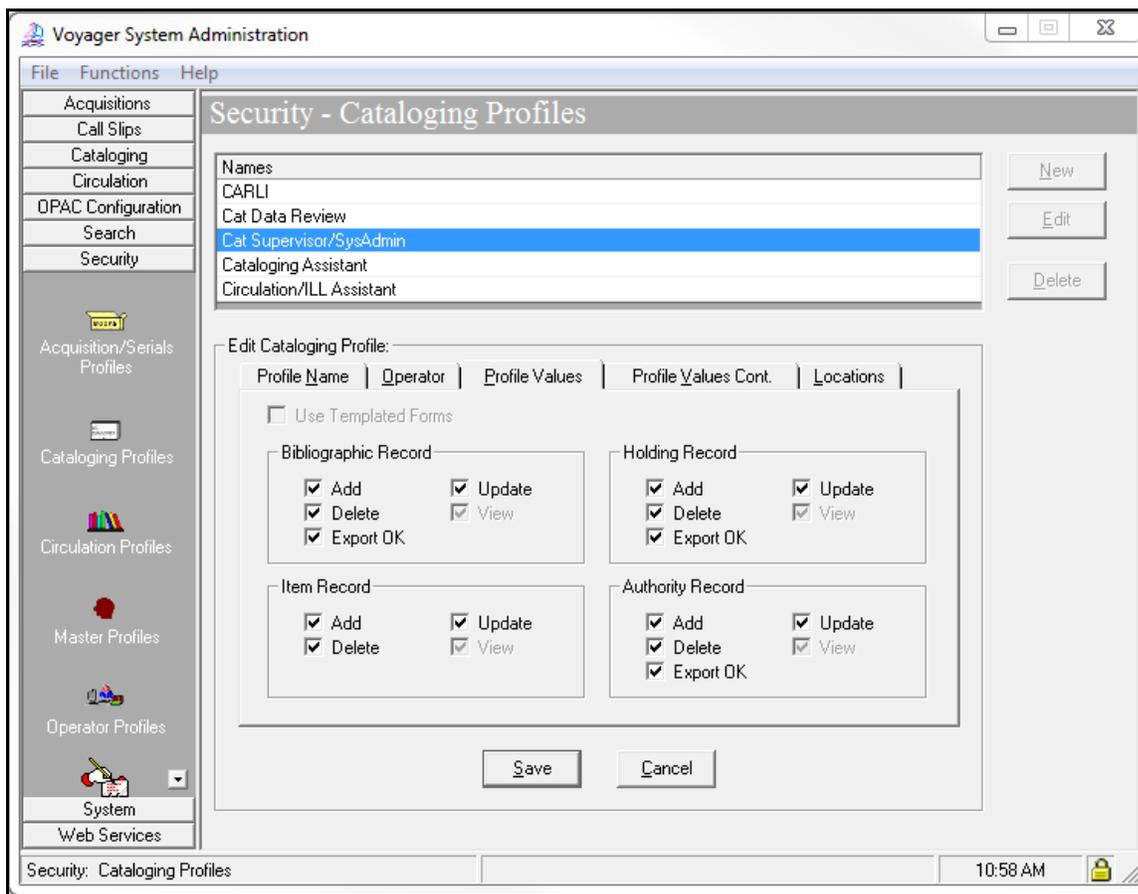
⊕ **Give the new Profile a Name that is indicative of the authorization levels associated with it (examples include: Cat Supervisor, Cat Student, Cat View Only).**

- There is a 25 character limit to the profile name.
- If the profile will be limited to specific locations within the library, name the profile to denote the location distinction. For example, if the library has both a Main and Law library, and the cataloging profiles include limitations based on locations, the library may wish to create both a *Cat Main Supervisor* and a *Cat Law Supervisor* profile.

Legend:

- ⊕ Consortial Rule for setting value(s)
- ☑ CARLI Recommendation for setting value(s)
- ∅ Does not apply; Or, Do not change this value

B. Profiles Values Tab



Security- Cataloging Profile- New Profile, Profile Values Tab

Review pages 9-54 through 9-67 of the Voyager 9.1.1 System Administration User's Guide for more information about Cataloging Profiles > Profile Values Tab.

Click the corresponding check boxes as appropriate to activate the particular authorized activity for each type of record (bib, MFHD, item, authority). The View option is automatically grayed out (i.e., deactivated) if the profile has Add, Delete, and/or Update checked/enabled.

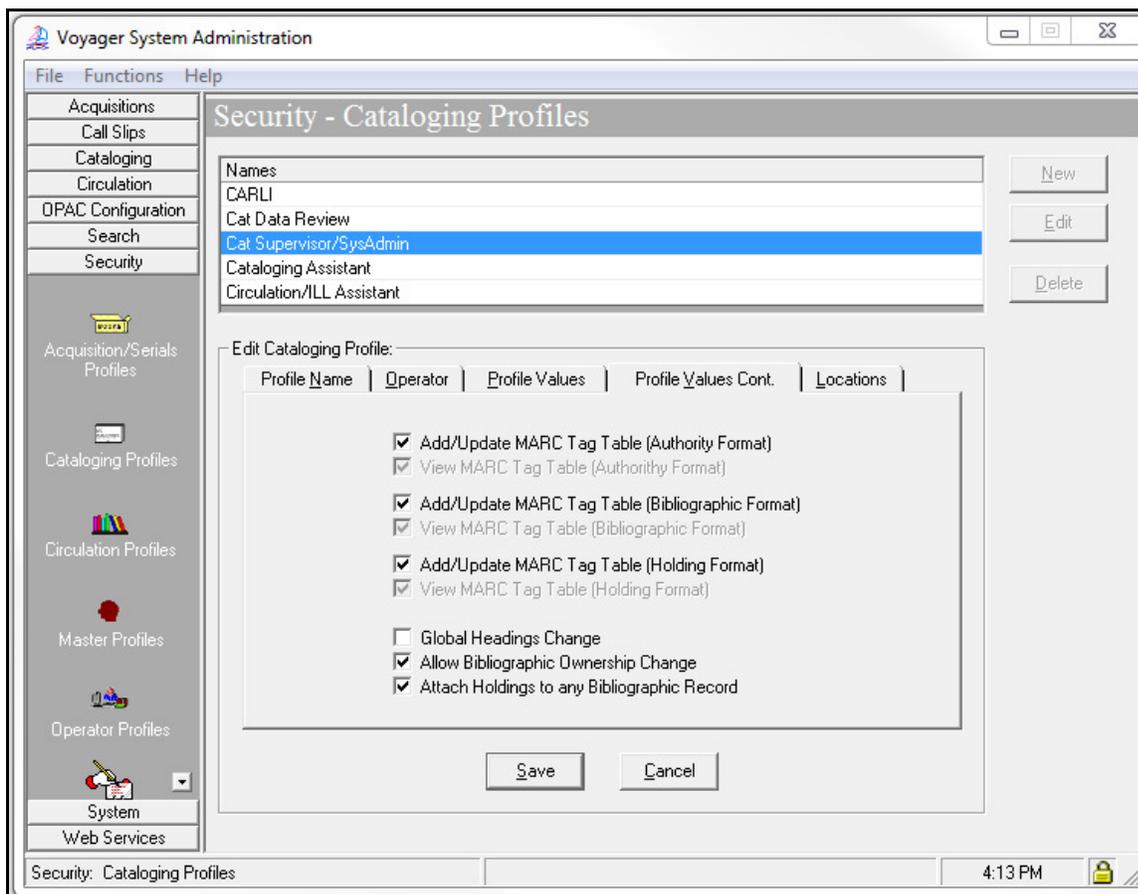
Cataloging profiles that are intended for staff that will copy ("Add") bib records from the I-Share Universal Catalog should have the *Export OK* option enabled.

- In the I-Share environment, Voyager's Export capability is typically used in association with Bibliographic records, for "backloading" functionality.
- When a bib record is marked as "OK to Export" in the Voyager cataloging client, that bib is later copied from the database and sent to OCLC to set the institution's holding symbol in WorldCat.

Legend:

- ⊕ Consortial Rule for setting value(s)
- ☑ CARLI Recommendation for setting value(s)
- ∅ Does not apply; Or, Do not change this value

C. Profiles Values Cont. Tab



Security- Cataloging Profile- New Profile, Profile Values Cont. Tab

Review pages 9-54 through 9-67 of the Voyager 9.1.1 System Administration User's Guide for more information about Cataloging Profiles> Profile Values Cont. Tab.

- ☑ In Voyager Cataloging, there are MARC Tag Tables (per record type) that are used to validate the structure of the MARC record when it is added to or edited within the database.
 - For example, a bib record tag table would indicate that the 245 field (for main title) is mandatory in each record, and that it is not a repeatable field.
 - ☑ CARLI recommends that only staff with high-level privileges have the option(s) to Add/Update any of the three record formats enabled.

If your library only has one Voyager Owning Library established:

- ☑ recommended do not check "Allow Bibliographic Ownership Change" for appropriate profiles.
- ☑ recommended check "Attach Holdings to any Bibliographic Record" for appropriate profiles.

If your library has more than one Voyager Owning Library established:

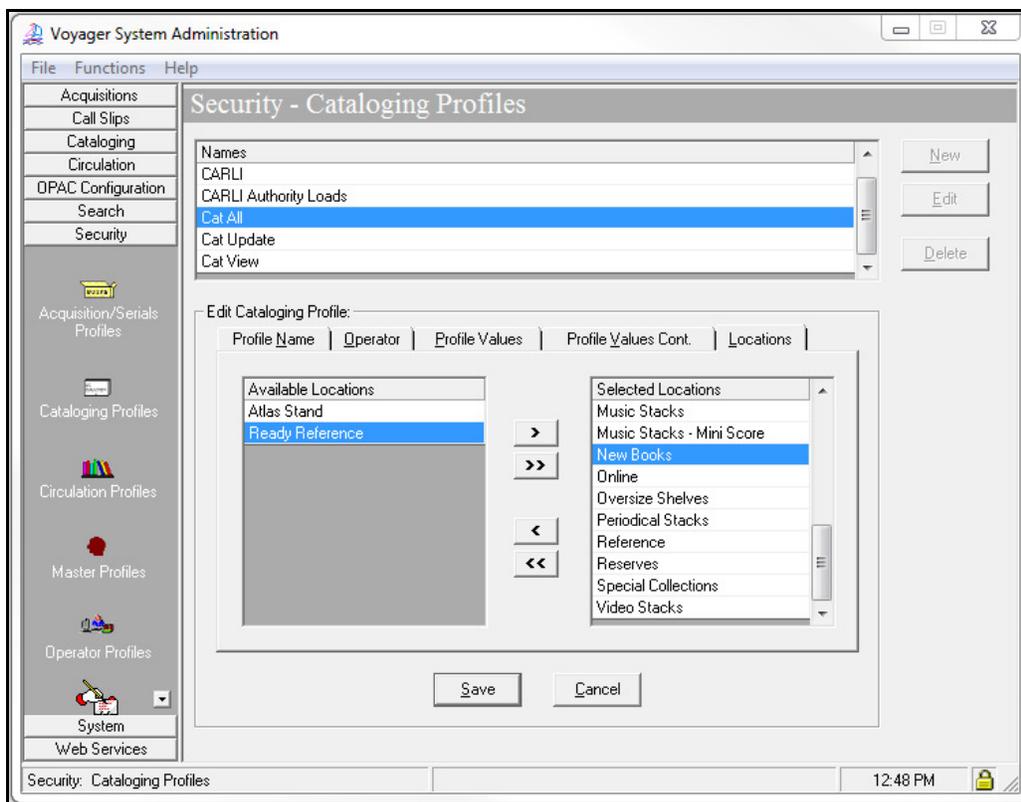
- ☑ recommended check "Allow Bibliographic Ownership Change" for appropriate profiles.
- ☑ recommended do not check "Attach Holdings to any Bibliographic Record" for appropriate profiles.

Legend:

- ⊕ Consortial Rule for setting value(s)
- ☑ CARLI Recommendation for setting value(s)
- ∅ Does not apply; Or, Do not change this value

CARLI recommends that the "Global Headings Change" option be disabled/unchecked. Most I-Share libraries do not use Global Headings Change. Contact CARLI Support to discuss recommended settings if your library does use Global Heading Change.

D. Locations Tab



Security- Cataloging Profile- New Profile, Locations Tab

Review pages 9-9 through 9-11 of the *Voyager 9.1.1 System Administration User's Guide* for more information about location limits.

The values entered on this tab determine which holding and HAPPENING locations are valid for the profile.

- The Available Locations box contains the locations that are not selected for this Cataloging Profile. Operators assigned to this Cataloging Profile are restricted from working with MFHDS/items in these locations.
- The Selected Locations box contains locations that have been selected for this Cataloging Profile. Operators assigned to this Cataloging Profile are able to work with MFHDS/items in these locations.

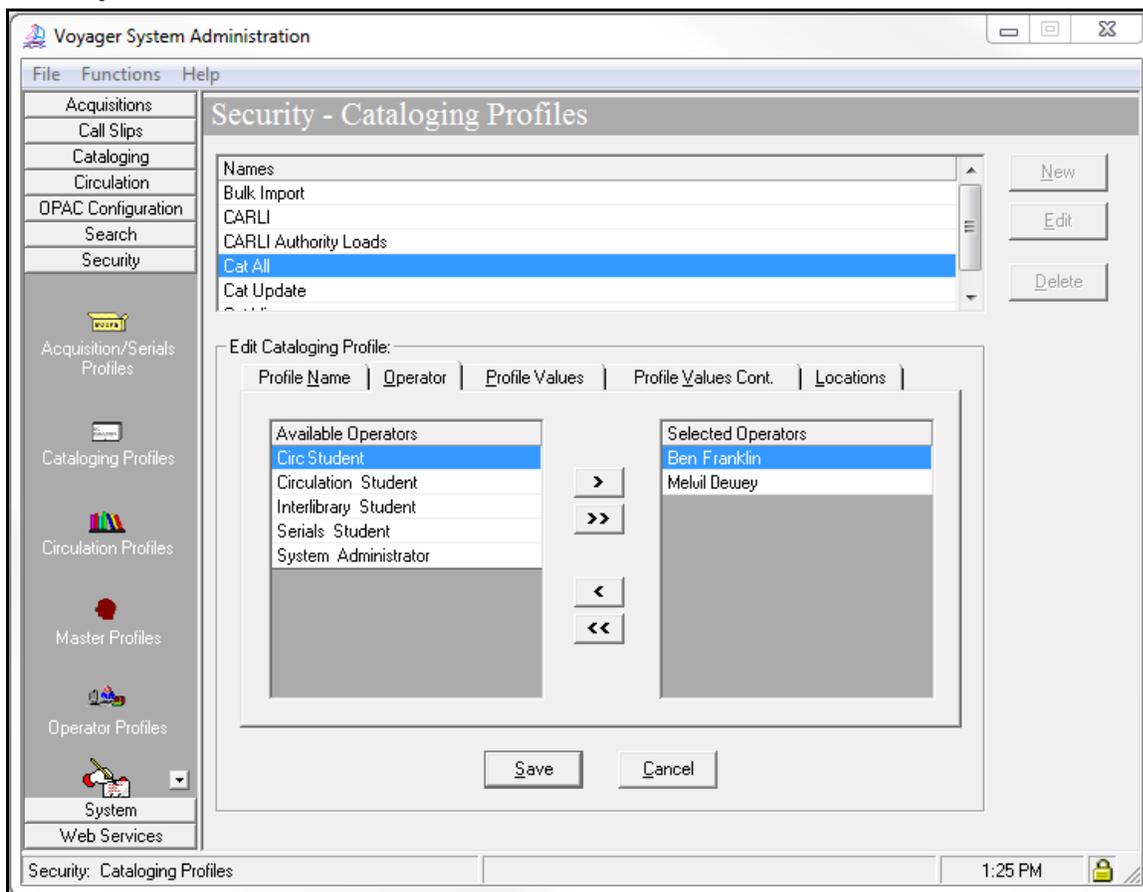
Use the arrow buttons to move the locations between the Available and Selected boxes. Individual locations can be selected for use in more than one Cataloging profile.

Libraries that have no need to restrict cataloging activities based on holding locations should select all locations for that profile.

Legend:

- ⊕ Consortial Rule for setting value(s)
- CARLI Recommendation for setting value(s)
- ∅ Does not apply; Or, Do not change this value

E. Operator Tab



Security- Cataloging Profile- Example Profile, Operator Tab

This is where individual Operators are linked to their appropriate Cataloging profile. Use the arrow buttons to move the operators between the Available and Selected boxes.

An individual Operator can only be associated with one Cataloging profile.

- In other words, the list of Available Operators includes accounts that have not been selected for any other Cataloging Profile.
- If you do not see the operator you are looking for in the Available list, look at the operator's current profile tab in their SysAdmin> Security> Operator Profile to see which profile they currently belong to. Deselect them from that profile, to make them available for the new profile.

It is NOT necessary to assign every operator to a cataloging profile, depending on your library's workflow.

- For example, it is common for Circulation Student operators to not be linked to any cataloging profiles in SysAdmin Security, which means this operator will always remain in the *Available Operators* box.

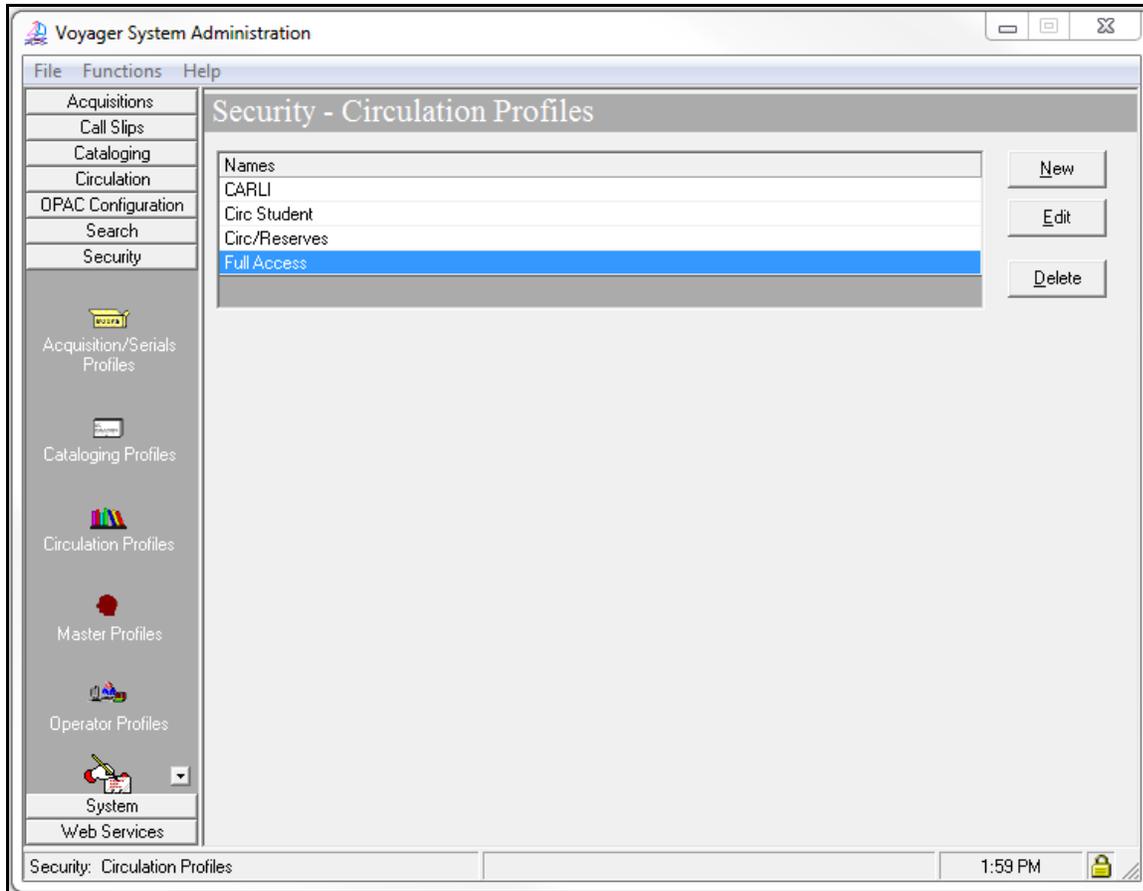
F. After all tabs have been populated for this profile, click Save.

Legend:

- ⊕ Consortial Rule for setting value(s)
- ☑ CARLI Recommendation for setting value(s)
- ∅ Does not apply; Or, Do not change this value

VII. Circulation Profiles

⊕ Libraries should create as many Circulation Profiles as needed to support local operations.



Security- Circulation Profile- Current Profiles Tab

Overview

The Circulation Profiles determine the assigned operators' permissions within the Circulation Client. You should create circulation profiles based on levels of permissions. Multiple operators can be assigned to the same Circulation Profile.

Information about Specific Cataloging Profiles in Voyager

- ☑ When Ex Libris (ExL) creates a new Voyager database, Ex Libris staff may add two Circulation Profiles called "Full Access" and "Restricted."
 - ☑ You can either edit these profiles to meet your library's needs, or delete them and create new Circulation Profiles that better suit your library's policies.
- ∅ CARLI staff will create a Circulation Profile in each I-Share library's database to be used by CARLI staff only, for troubleshooting purposes.
 - ∅ Do NOT edit any settings in the Circulation Profile with the name of "CARLI" (or "ILCSO" in older I-Share databases), including editing or adding/deleting any operators linked to these profiles.

Legend:

- ⊕ Consortial Rule for setting value(s)
- ☑ CARLI Recommendation for setting value(s)
- ∅ Does not apply; Or, Do not change this value

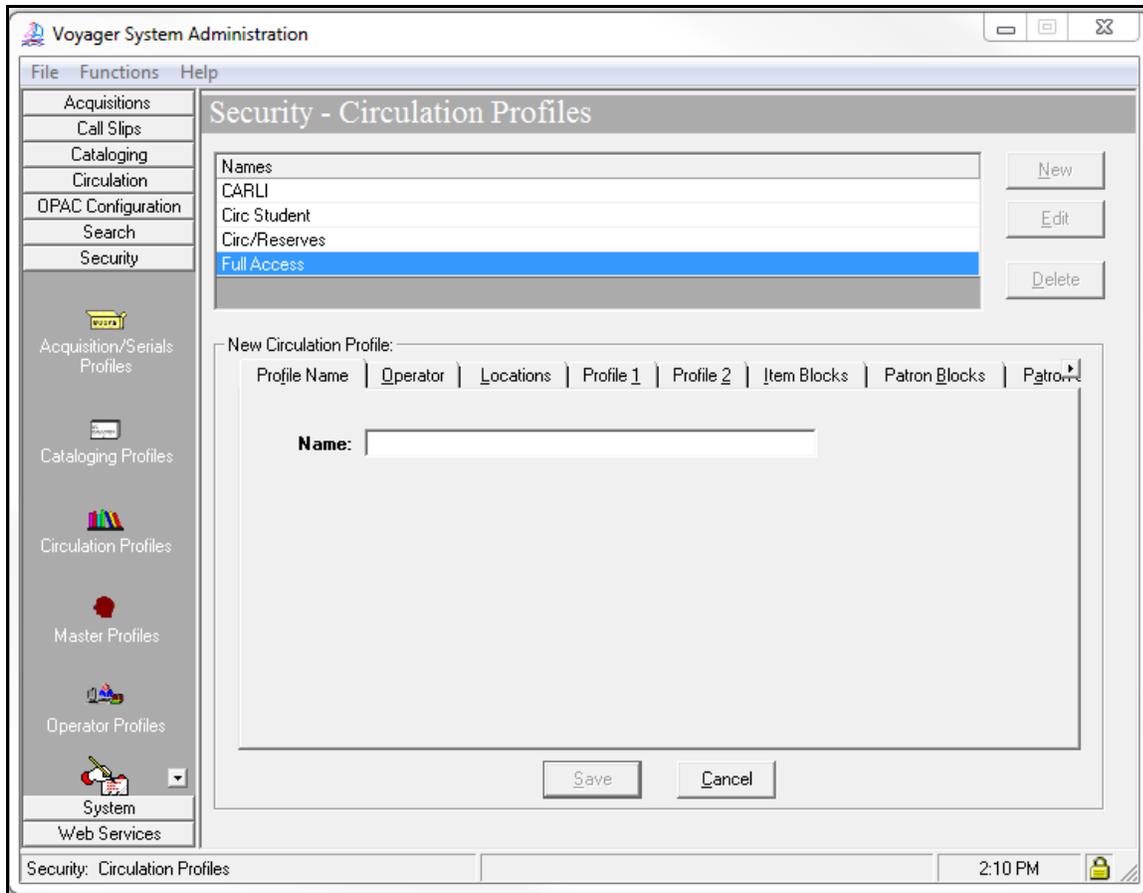
Adding/Editing a Circulation Profile

In Voyager SysAdmin> Security> Circulation Profiles

- To Add a new Circulation Profile, click [New].
- To Edit an existing Circulation Profile, highlight the name and click [Edit].
- To Delete a Circulation Profile, highlight the name and click [Delete].

When adding a new Circulation Profile, complete all 8 tabs in the order described below, and then click [Save].

A. Profile Name Tab



Security- Circulation Profile- New Profile, Profile Name Tab

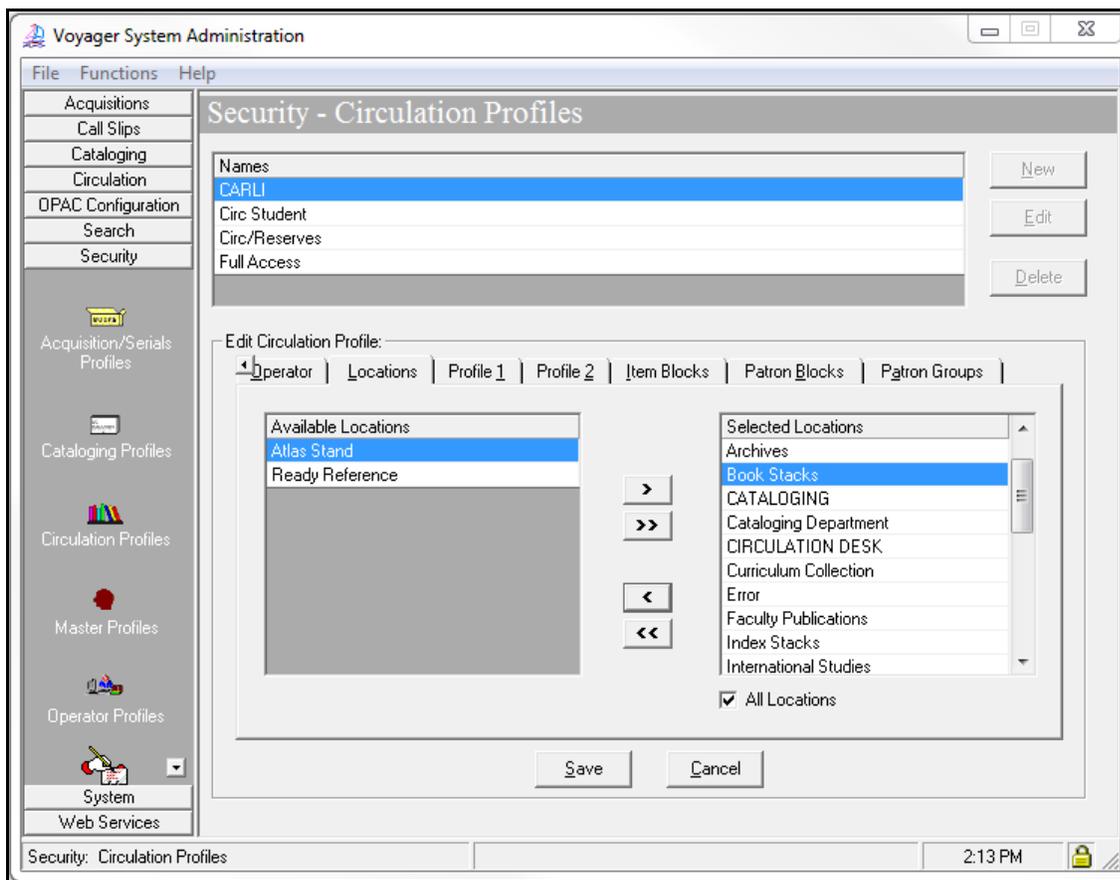
⊕ **Give the new Profile a Name that is indicative of the authorization levels associated with it (examples include: Circ Supervisor, Circ Student, Reserve Clerk).**

- There is a 25 character limit to the profile name.
- If the profile will be limited to specific locations within the library, name the profile to denote the location distinction. For example, if the library has both a Main and Branch library, and the circulation profiles include limitations based on locations, the library may wish to create both a *Circ Main Supervisor* and a *Circ Branch Supervisor* profile.

Legend:

- ⊕ Consortial Rule for setting value(s)
- ☑ CARLI Recommendation for setting value(s)
- ∅ Does not apply; Or, Do not change this value

B. Locations Tab



Security- Circulation Profile- Locations Tab

Review pages 9-9 through 9-11 of the *Voyager 9.1.1 System Administration User's Guide* for more information about location limits.

The values entered on this tab determine which circulation locations are valid for the profile.

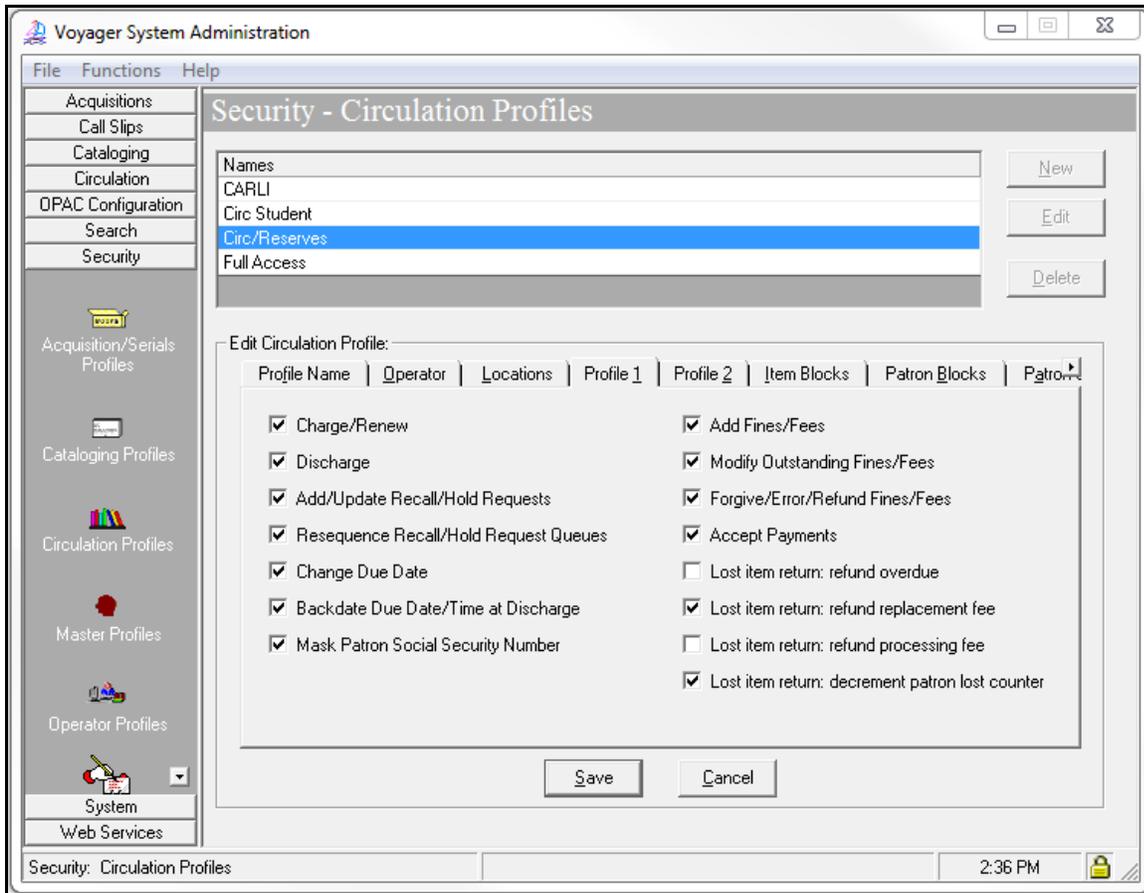
- The Available Locations box contains the locations that are not selected for this Circulation Profile. Operators assigned to this Circulation Profile are restricted from working with resources from these locations.
- The Selected Locations box contains locations that have been selected for this Circulation Profile. Operators assigned to this Circulation Profile are able to work with resources from these locations.
- The *All Locations* checkbox means that all existing locations, whether selected or not, are to be considered part of this profile. This includes any future locations that might be added.
 - Libraries that have no current or future need to restrict circulation activities based on holding or HAPPENING locations should check the *All Locations* checkbox for that profile.
 - If the *All Locations* box is checked, removing a location from the *Selected Locations* box will have no effect.

Use the arrow buttons to move the locations between the Available and Selected boxes. Individual locations can be selected for use in more than one Circulation profile.

Legend:

- ⊕ Consortial Rule for setting value(s)
- ☑ CARLI Recommendation for setting value(s)
- ∅ Does not apply; Or, Do not change this value

C. Profile 1 Tab



Security- Circulation Profile- Profile 1 Tab

Review pages 9-73 through 9-85 of the Voyager 9.1.1 System Administration User's Guide for more information about Circulation Profiles > Profile 1 and Profile 2 Tabs.

Click each check box as appropriate to enable that particular authorized activity.

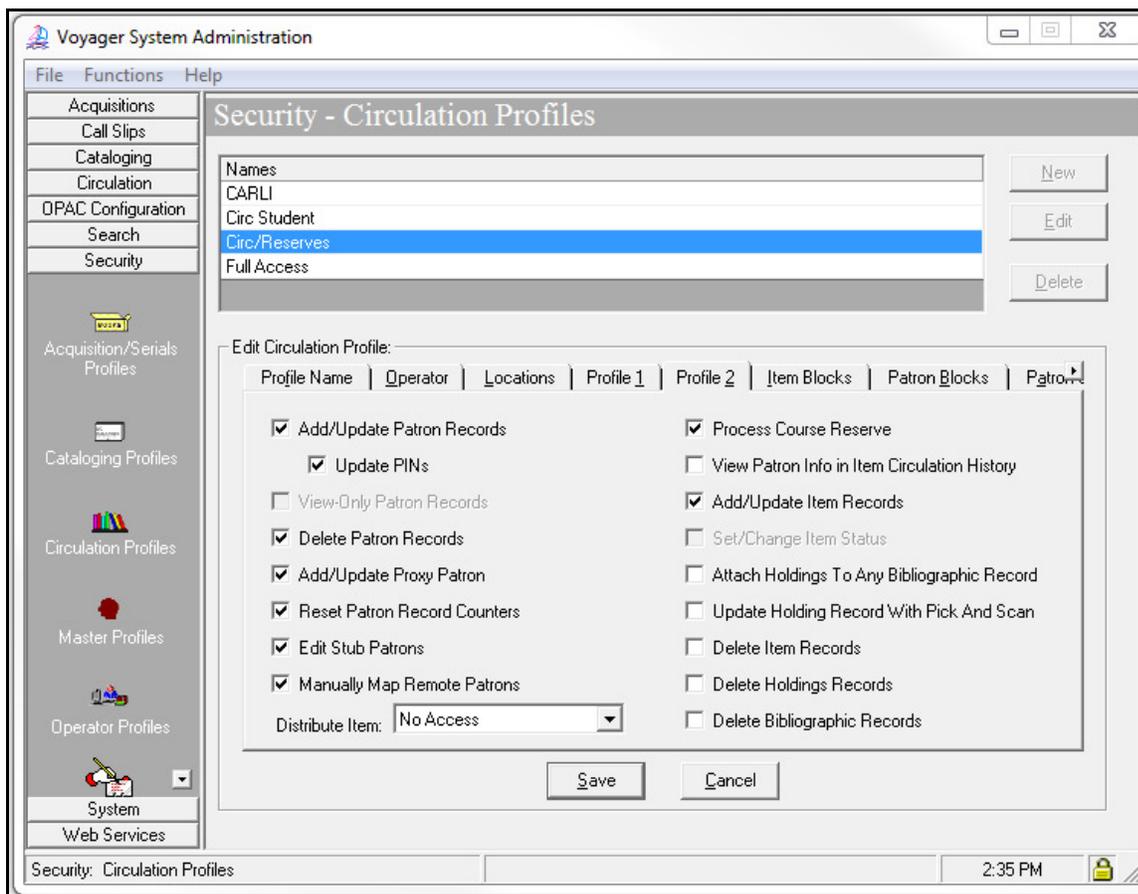
⊕ All circulation profiles must have the *Mask Patron Social Security Number* option checked/enabled, for patron privacy purposes. There is a consortial policy prohibiting storing SSNs in patron records. Enabling masking of the SSN is an extra level of security to prevent unauthorized use of the SSN field in patron records.

There are no other required default Circulation Operator settings, although it makes sense that each profile (other than View-only profiles) have the "Charge/Renew" option enabled.

Legend:

- ⊕ Consortial Rule for setting value(s)
- ☑ CARLI Recommendation for setting value(s)
- ⊘ Does not apply; Or, Do not change this value

D. Profile 2 Tab



Security- Circulation Profile- Profile 2 Tab

Review pages 9-73 through 9-85 of the Voyager 9.1.1 System Administration User's Guide for more information about Circulation Profiles > Profile 1 and Profile 2 Tabs.

Click each check box as appropriate to enable that particular authorized activity.

⊕ All circulation profiles must have the *View Patron Info in Item Circulation History* option unchecked/disabled, for patron privacy purposes. There is a consortial policy prohibiting the retention of the patron's Circulation History. Disabling the ability to view the patron's Circulation History is an extra level of security.

There are no other required default Circulation Operator settings on the Profile 2 tab.

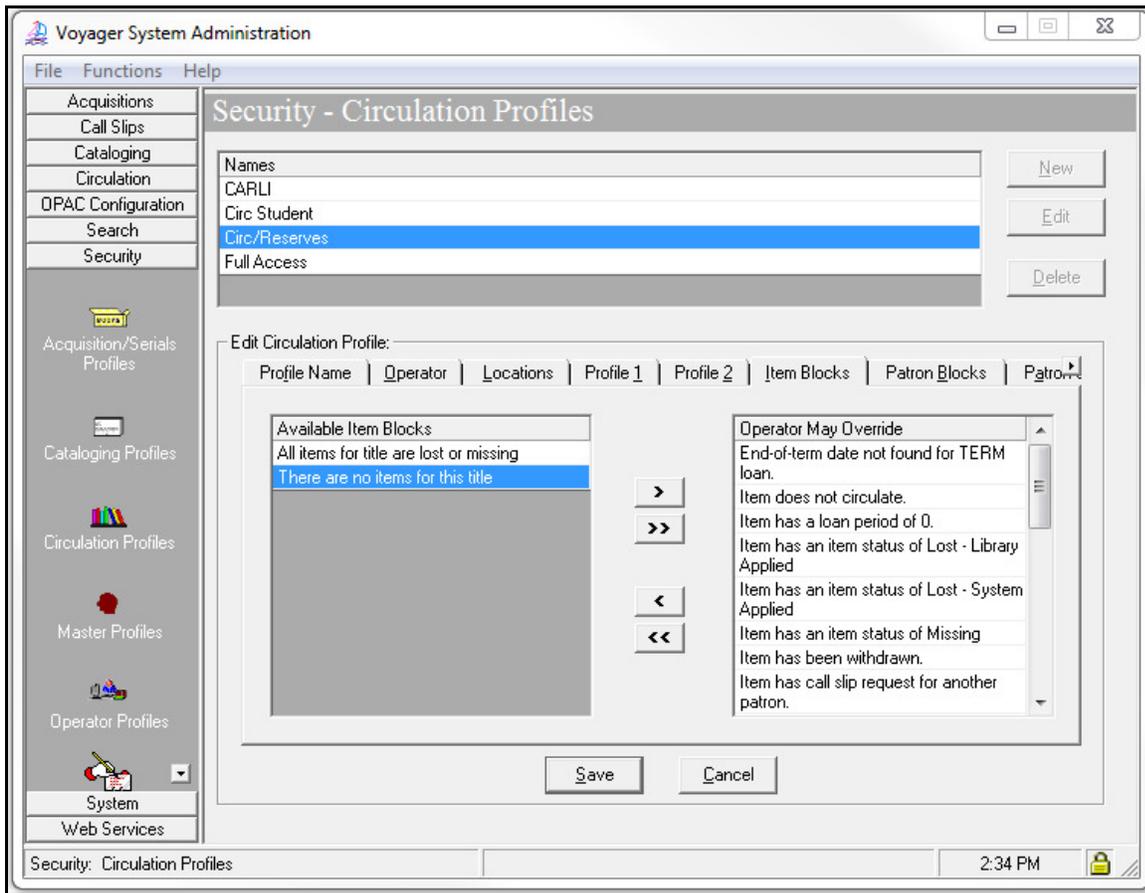
If library staff will be able to use Pick and Scan in the Voyager Circulation client, it may make sense to check (enable) these settings:

- Add/Update Item Records
- Update Holdings Record With Pick And Scan
- Delete Item Records
- Delete Holdings Records
- Delete Bibliographic Records

Legend:

- ⊕ Consortial Rule for setting value(s)
- ☑ CARLI Recommendation for setting value(s)
- ⊘ Does not apply; Or, Do not change this value

E. Item Blocks Tab



Security- Circulation Profile- Item Blocks Tab

Review pages 9-85 through 9-89 of the Voyager 9.1.1 System Administration User's Guide for more information about Circulation Profiles > Item Blocks Tab.

The Item Blocks tab specifies which item-related blocks an operator linked to the profile is able to override during a circulation transaction.

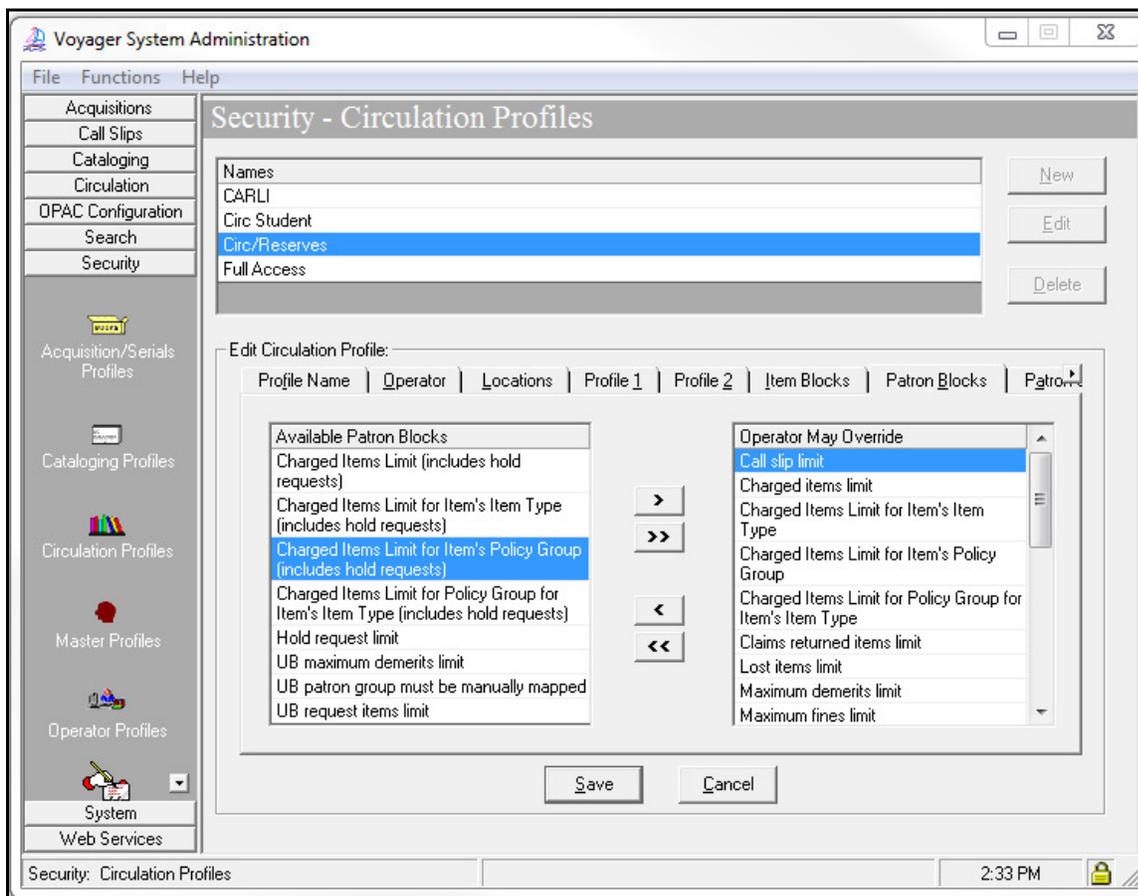
Use the arrow buttons to move the item blocks between the *Available Item Blocks* and *Operator May Override* boxes.

Individual item blocks can be enabled for override in more than one Circulation profile.

Legend:

- ⊕ Consortial Rule for setting value(s)
- ☑ CARLI Recommendation for setting value(s)
- ∅ Does not apply; Or, Do not change this value

F. Patron Blocks Tab



Security- Circulation Profile- Patron Blocks Tab

Review pages 9-89 through 9-92 of the Voyager 9.1.1 System Administration User's Guide for more information about Circulation Profiles > Patron Blocks Tab.

The Patron Blocks tab specifies which patron-related blocks an operator linked to the profile is able to override during a circulation transaction.

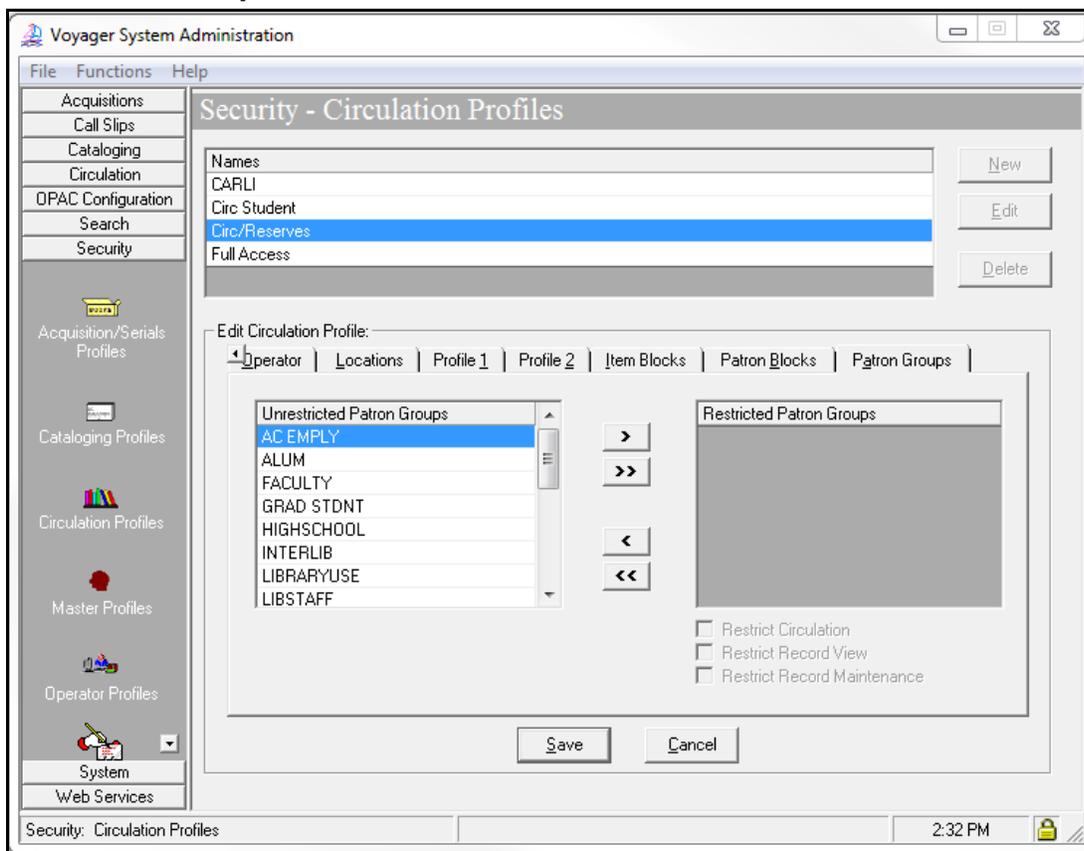
Use the arrow buttons to move the patron blocks between the *Available Patron Blocks* and *Operator May Override* boxes.

Individual patron blocks can be enabled for override in more than one Circulation profile.

Legend:

- ⊕ Consortial Rule for setting value(s)
- ☑ CARLI Recommendation for setting value(s)
- ∅ Does not apply; Or, Do not change this value

G. Patron Groups Tab



Security- Circulation Profile- (Restricted) Patron Groups Tab

Review pages 9-92 through 9-94 of the Voyager 9.1.1 System Administration User's Guide for more information about Circulation Profiles > Patron Groups Tab.

The Patron Groups tab allows you three options for restricting library staff interactions with Voyager Patron Records: *Restrict Record Maintenance*, *Restrict Record View*, and *Restrict Circulation*.

Restrict Record Maintenance prevents the library staff members associated with the Circulation Security Profile from:

- editing the patron records associated with the Restricted Patron Groups.
- viewing the Outstanding Fines on an item, if the fines are associated with a patron from the Restricted Patron Group.

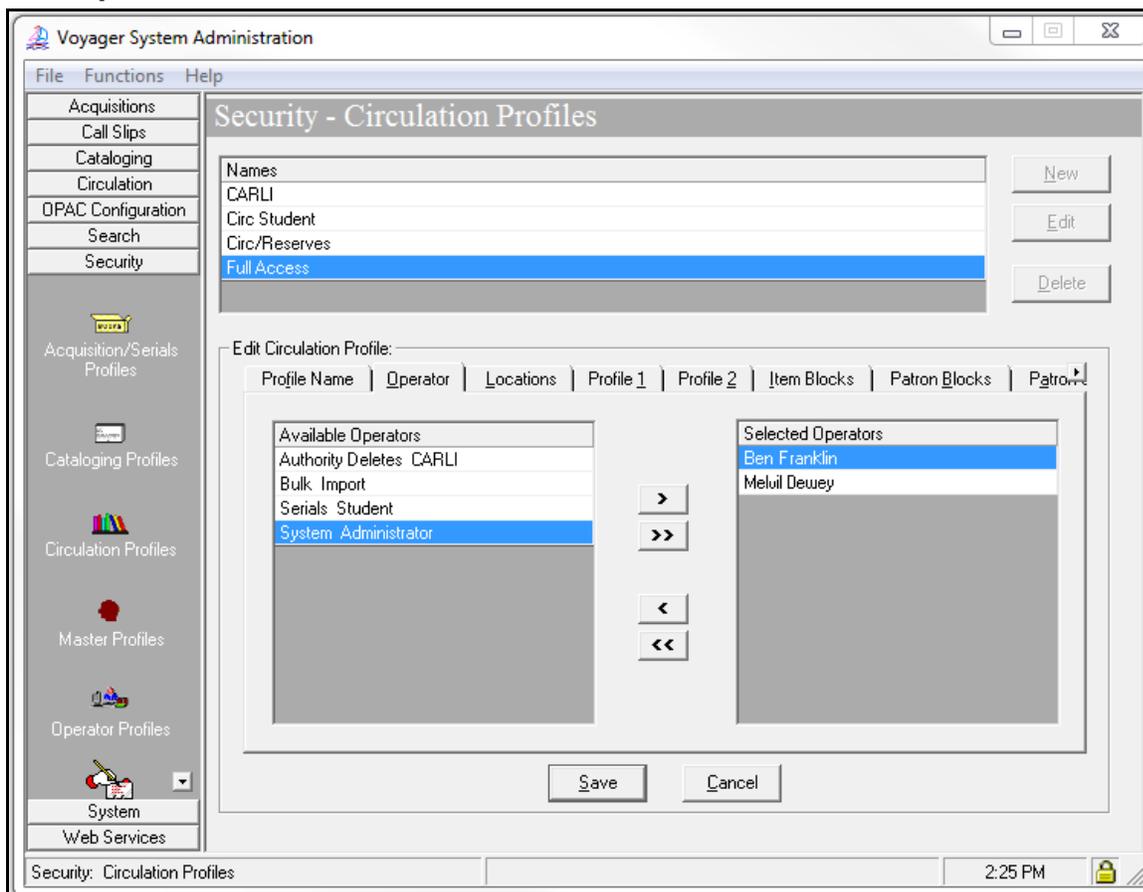
⊕ Do not check *Restrict Circulation* or *Restrict Record View*. These settings are problematic because they prevent library staff members associated with the Circulation Security Profile from being able to search for a patron record from the Restricted Patron Group.

- Instead of receiving a warning that the patron record is restricted and cannot be viewed, library staff receive the error "Unable to find patron name" followed by "Unable to find patron."
- Example of problem: If you Restrict Record View for the "Problem Patron" patron group, and library staff search for a patron assigned to that patron group, they will not retrieve the patron's record. They will not know the patron is already entered in the system, and may manually add a new record for the patron, thus allowing that Problem Patron borrowing privileges.

Legend:

- ⊕ Consortial Rule for setting value(s)
- ☑ CARLI Recommendation for setting value(s)
- ∅ Does not apply; Or, Do not change this value

H. Operator Tab



Security- Circulation Profile- Operator Tab

This is where individual Operators are linked to their appropriate Circulation profile. Use the arrow buttons to move the operators between the Available and Selected boxes.

An individual Operator can only be associated with one Circulation profile.

- In other words, the list of Available Operators includes accounts that have not been selected for any other Circulation Profile.
- If you do not see the operator you are looking for in the Available list, look at the operator's current profile tab in their SysAdmin> Security> Operator Profile to see which profile they currently belong to. Deselect them from that profile, to make them available for the new profile.

It is NOT necessary to assign every operator to a circulation profile, depending on your library's workflow.

- For example, it is common for Acquisitions Student operators to not be linked to any circulation profiles in SysAdmin Security, which means this operator will always remain in the "Available Operators" box.

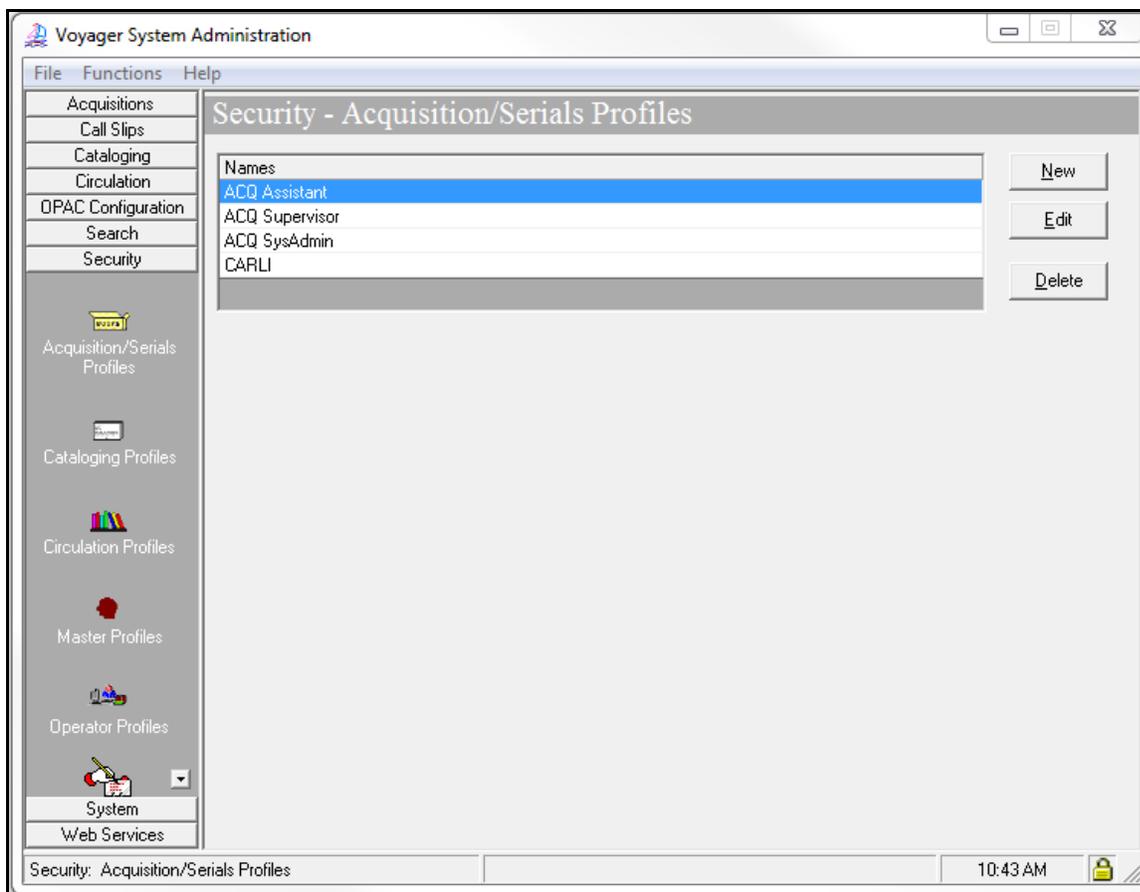
I. After all tabs have been populated for this profile, click Save.

Legend:

- ⊕ Consortial Rule for setting value(s)
- ☑ CARLI Recommendation for setting value(s)
- ∅ Does not apply; Or, Do not change this value

VIII. Acquisition/Serials Profiles

⊕ Libraries should create as many Acquisition Profiles as needed to support local operations.



Security- Acquisitions Profile- Current Profiles Tab

Overview

The Acquisitions Profiles determine the assigned operators' permissions within the Acquisitions Client. You should create acquisitions profiles based on levels of permissions. Multiple operators can be assigned to the same Acquisitions Profile.

Information for New I-Share Libraries

- For a new I-Share library's Voyager implementation, the library can begin to use Acquisitions/Serials as soon after the formal acceptance of the production bib load as desired.
- However, many I-Share libraries wait to begin using Acq/Ser until after the beginning of a new fiscal period, which for many libraries is after they are live on Voyager for Circulation.
- In addition, some I-Share libraries never choose to use Voyager Acq/Serials, as it is considered an optional Voyager component.

Legend:

- ⊕ Consortial Rule for setting value(s)
- ☑ CARLI Recommendation for setting value(s)
- ∅ Does not apply; Or, Do not change this value

Information about Specific Acquisitions Profiles in Voyager

∅ Because none of the new I-Share libraries in recent years have elected to convert any types of Acquisitions data to Voyager, there are no Acquisition/Serials profiles created by default by Ex Libris.
∅ CARLI staff will create an Acquisitions Profile in each I-Share library's database to be used by CARLI staff only, for troubleshooting purposes.

- ∅ Do **NOT** edit any settings in the Acquisitions Profile with the name of "CARLI" (or "ILCSO" in older I-Share databases), including editing or deleting any operators linked to these profiles.

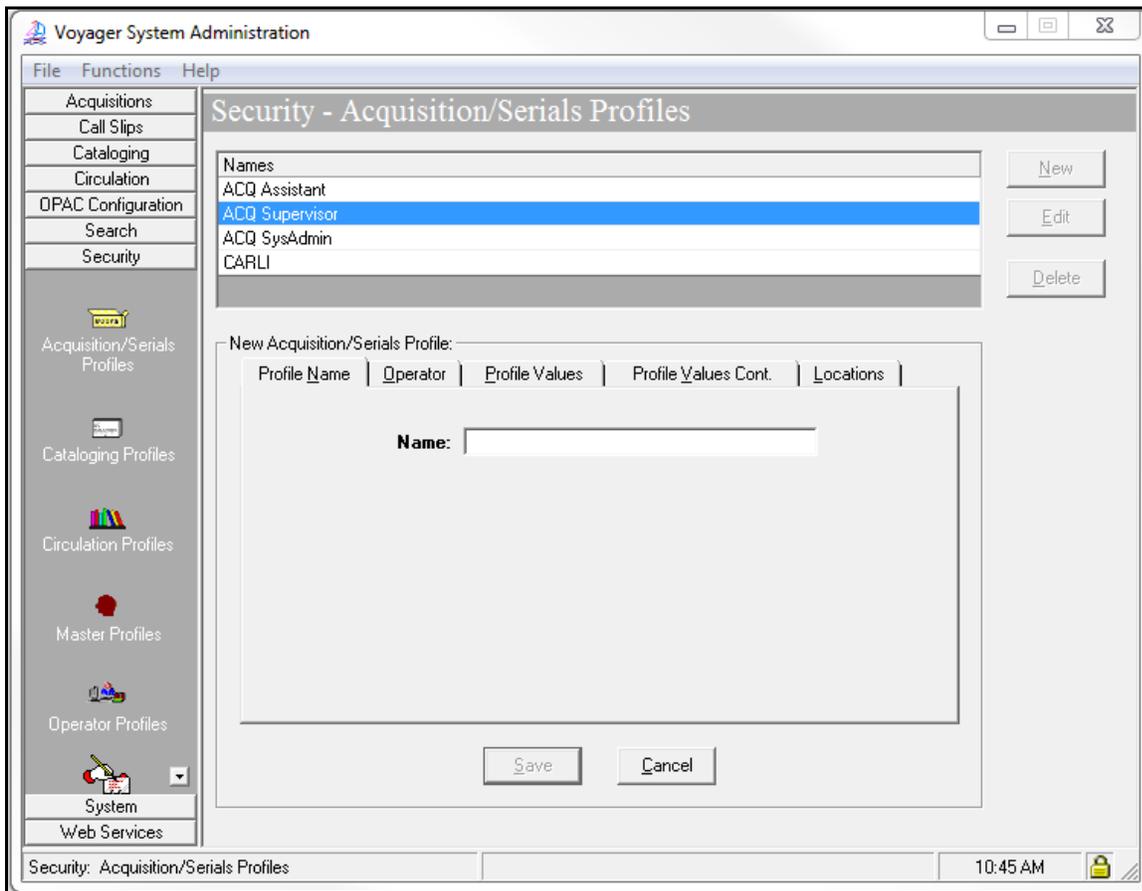
Adding/Editing an Acquisitions Profile

In Voyager SysAdmin> Security> Acquisitions Profiles

- To Add a new Acquisitions Profile, click [New].
- To Edit an existing Acquisitions Profile, highlight the name and click [Edit].
- To Delete an Acquisitions Profile, highlight the name and click [Delete].

When adding a new Acquisitions Profile, complete all 5 tabs in the order described below, and then click [Save].

A. Profile Name Tab



Security- Acquisitions Profile- New Profile, Profile Name Tab

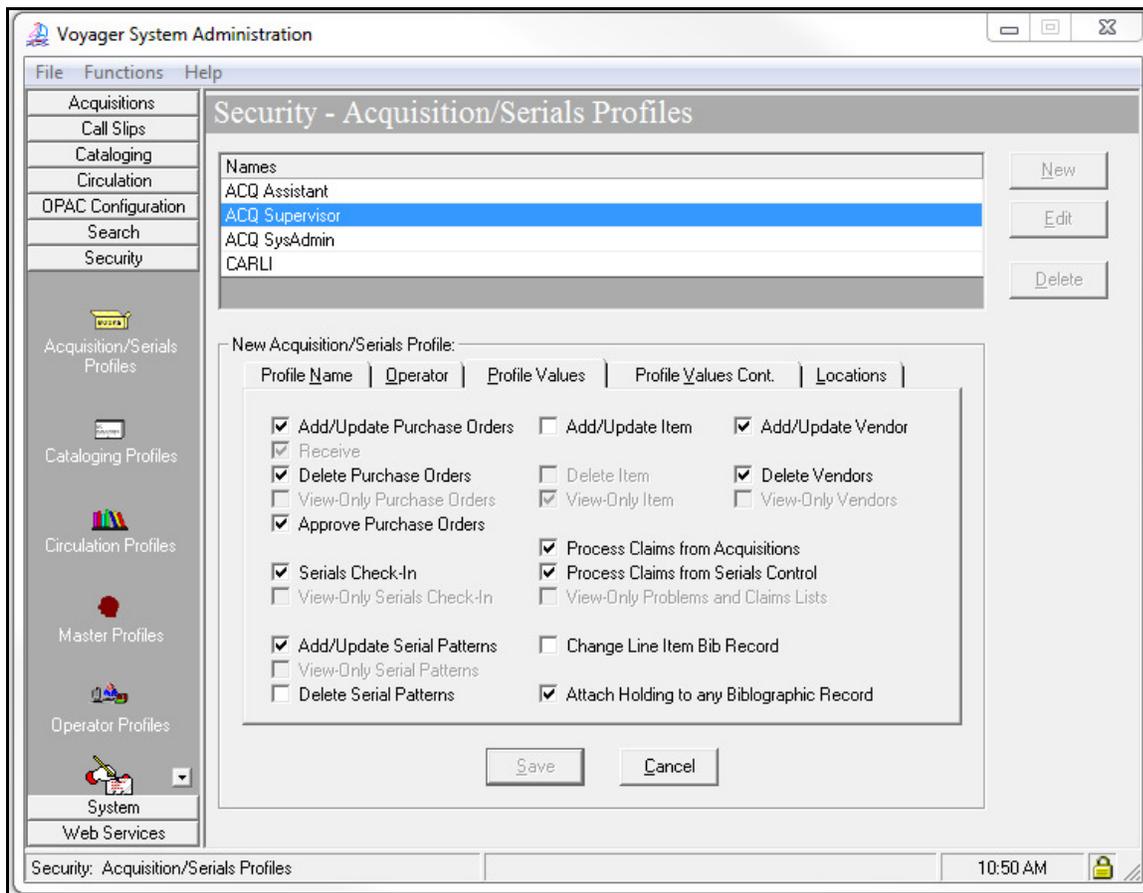
Legend:

- ⊕ Consortial Rule for setting value(s)
- ☑ CARLI Recommendation for setting value(s)
- ∅ Does not apply; Or, Do not change this value

⊕ **Give the new Profile a Name that is indicative of the authorization levels associated with it (examples include: Acq Supervisor, Acq Student, Serials Student).**

- There is a 25 character limit to the profile name.
- If the profile will be limited to specific locations within the library, name the profile to denote the location distinction. For example, if the library has both a Main and Branch library, and the acquisitions profiles include limitations based on locations, the library may wish to create both a *Acq Main Supervisor* and a *Acq Branch Supervisor* profile.

B. Profile Values Tab



Security- Acquisitions Profile- New Profile, Profile Values Tab

Review pages 9-40 through 9-48 of the Voyager 9.1.1 System Administration User’s Guide for more information about Acquisitions Profiles> Profile Values and Profile Values Cont. Tabs.

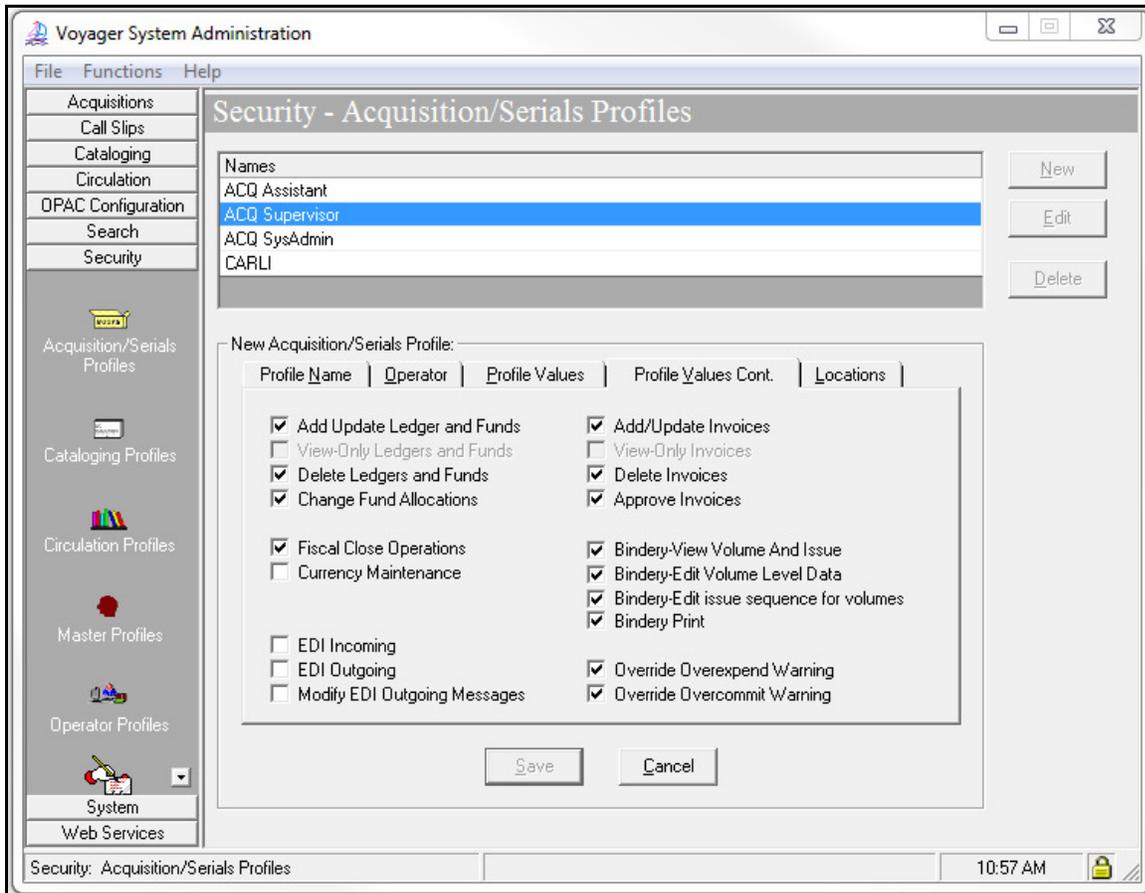
Click each check box as appropriate to enable that particular authorized activity.

When a new profile is being created, by default the View-Only options are always automatically grayed out (i.e., de-activated) if the profile has Add, Delete, and/or Update checked/enabled for each corresponding type of record. If Add, Delete, and/or Update is not checked/enabled for a record type, the View-Only option will remain greyed out, but will be considered activated.

Legend:

- ⊕ Consortial Rule for setting value(s)
- ☑ CARLI Recommendation for setting value(s)
- ∅ Does not apply; Or, Do not change this value

C. Profile Values Cont. Tab



Security- Acquisitions Profile- New Profile, Profile Values Cont. Tab

Review pages 9-40 through 9-48 of the Voyager 9.1.1 System Administration User's Guide for more information about Acquisitions Profiles > Profile Values and Profile Values Cont. Tabs.

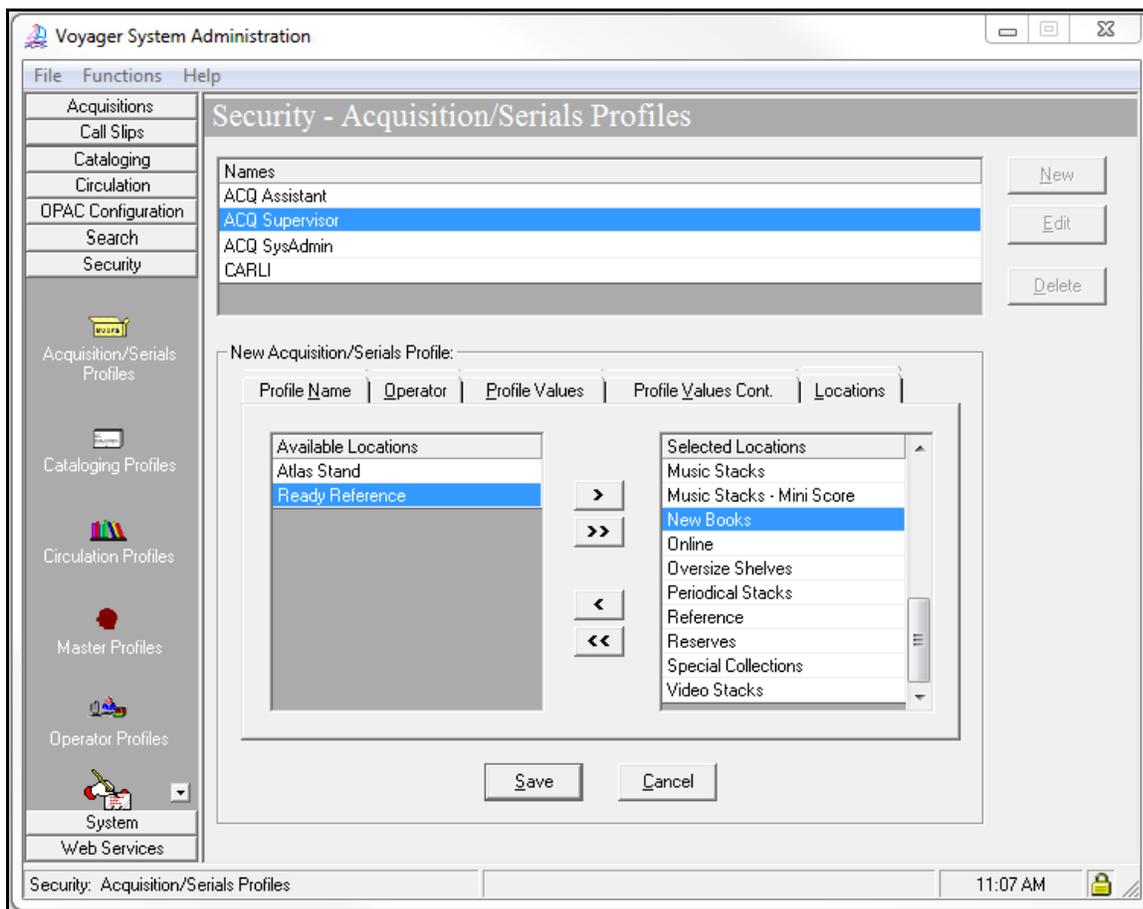
Click each check box as appropriate to enable that particular authorized activity.

Note that the View-Only options are automatically grayed out (i.e., de-activated) if the profile has Add, Delete, and/or Update checked/enabled for each corresponding type of record.

Legend:

- ⊕ Consortial Rule for setting value(s)
- ☑ CARLI Recommendation for setting value(s)
- ∅ Does not apply; Or, Do not change this value

D. Locations Tab



Security- Acquisitions Profile- New Profile, Locations Tab

Review pages 9-9 through 9-11 of the *Voyager 9.1.1 System Administration User's Guide* for more information about location limits.

The values entered on this tab determine which holding and HAPPENING locations are valid for the profile.

- The Available Locations box contains the locations that are not selected for this Acquisitions Profile. Operators assigned to this Acquisitions Profile are restricted from processing materials in Acquisitions for that location.
- The Selected Locations box contains locations that have been selected for this Acquisitions Profile. Operators assigned to this Acquisitions Profile are able to work with MFHDS/items in these locations.

Use the arrow buttons to move the locations between the Available and Selected boxes.

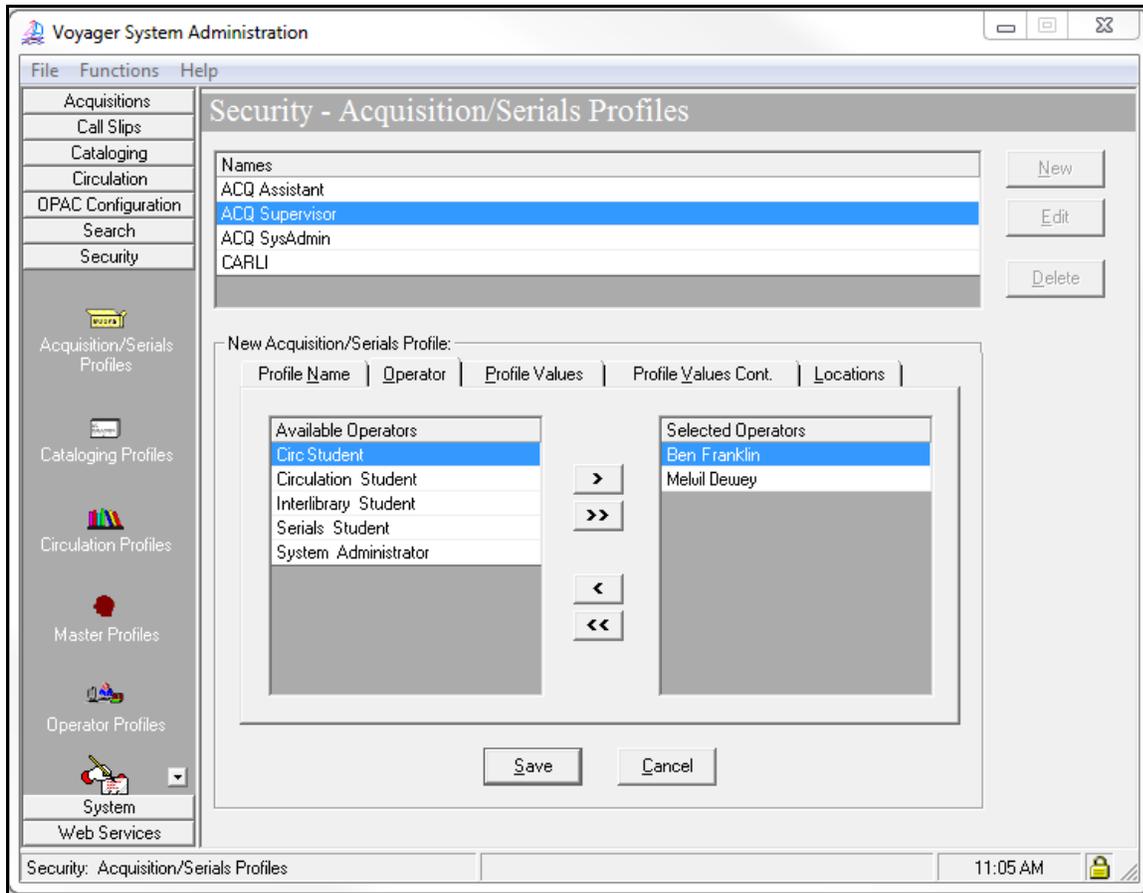
Individual locations can be selected for use in more than one Acquisitions profile.

Libraries that have no need to restrict acquisitions activities based on holding locations should select all locations for that profile.

Legend:

- ⊕ Consortial Rule for setting value(s)
- CARLI Recommendation for setting value(s)
- ∅ Does not apply; Or, Do not change this value

E. Operator Tab



Security- Acquisitions Profile- Operator Tab

This is where individual Operators are linked to their appropriate Acquisitions profile. Use the arrow buttons to move the operators between the Available and Selected boxes.

An individual Operator can only be associated with one Acquisitions profile.

- In other words, the list of Available Operators includes accounts that have not been selected for any other Acquisitions Profile.
- If you do not see the operator you are looking for in the Available list, look at the operator's current profile tab in their SysAdmin> Security> Operator Profile to see which profile they currently belong to. Deselect them from that profile, to make them available for the new profile.

It is NOT necessary to assign every operator to an acquisitions profile, depending on your library's workflow.

- For example, it is common for Circulation Student operators to not be linked to any acquisitions profiles in SysAdmin Security, which means this operator will always remain in the "Available Operators" box.

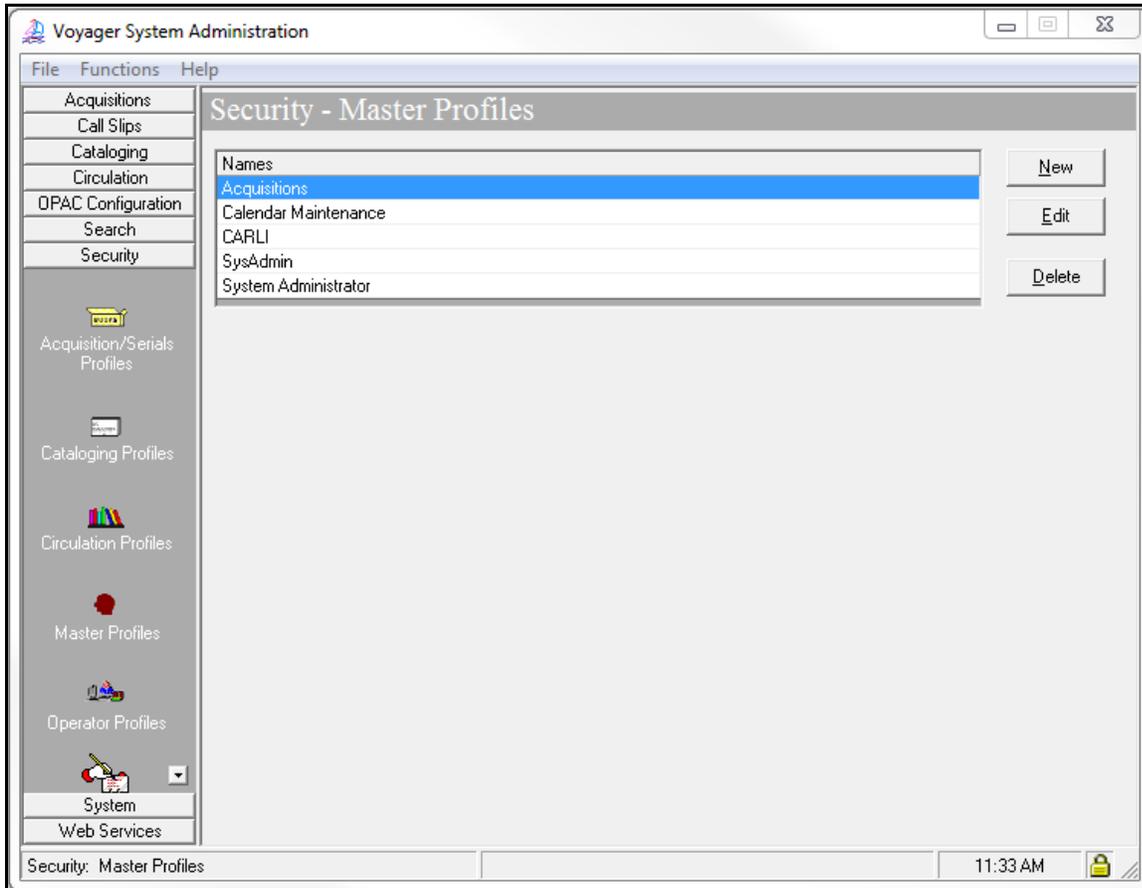
F. After all tabs have been populated for this profile, click Save.

Legend:

- ⊕ Consortial Rule for setting value(s)
- ☑ CARLI Recommendation for setting value(s)
- ∅ Does not apply; Or, Do not change this value

IX. Master Profiles

⊕ Libraries should create **ONLY** as many Master Profiles as needed to support local operations.



Security- Master Profile- Current Profiles Tab

Review pages 9-23 through 9-38 of the *Voyager 9.1.1 System Administration User's Guide* for more information about Master Profiles.

Overview

Master Profiles determine access privileges to the different areas within System Administration itself (e.g., the ability to add/edit Acq/Ser Profiles, Cat Profiles, Circ Profiles, Call Slip queues and rules, System Locations, Security settings, etc...). You should create master profiles based on levels of permissions. Multiple operators can be assigned to the same Master Profile.

Information about Specific Master Profiles in Voyager

∅ When a new Voyager database is created, a default Operator of "SYSADMIN" is created by ExL, and it is always associated with a Master Profile called "System Administrator."

Legend:

- ⊕ Consortial Rule for setting value(s)
- ☑ CARLI Recommendation for setting value(s)
- ∅ Does not apply; Or, Do not change this value

- This master profile is intended for use by ExL staff only, and its Operator and Profile values tabs cannot be edited.
- ∅ CARLI staff will create a Master Profile in each I-Share library's database to be used by CARLI staff only, for troubleshooting purposes.
- ∅ Do NOT edit any settings in the Master Profile with the name of "CARLI" (or "ILCSO" in older I-Share databases), including editing or adding/deleting any operators linked to these profiles.

Adding/Editing a Master Profile

In Voyager SysAdmin> Security> Master Profiles

- To Add a new Master Profile, click [New].
- To Edit an existing Master Profile, highlight the name and click [Edit].
- To Delete a Master Profile, highlight the name and click [Delete].

Library staff should create at least one new Master Profile that allows access to all parts of System Administration, and then link the appropriate library operator(s) to this high level master profile.

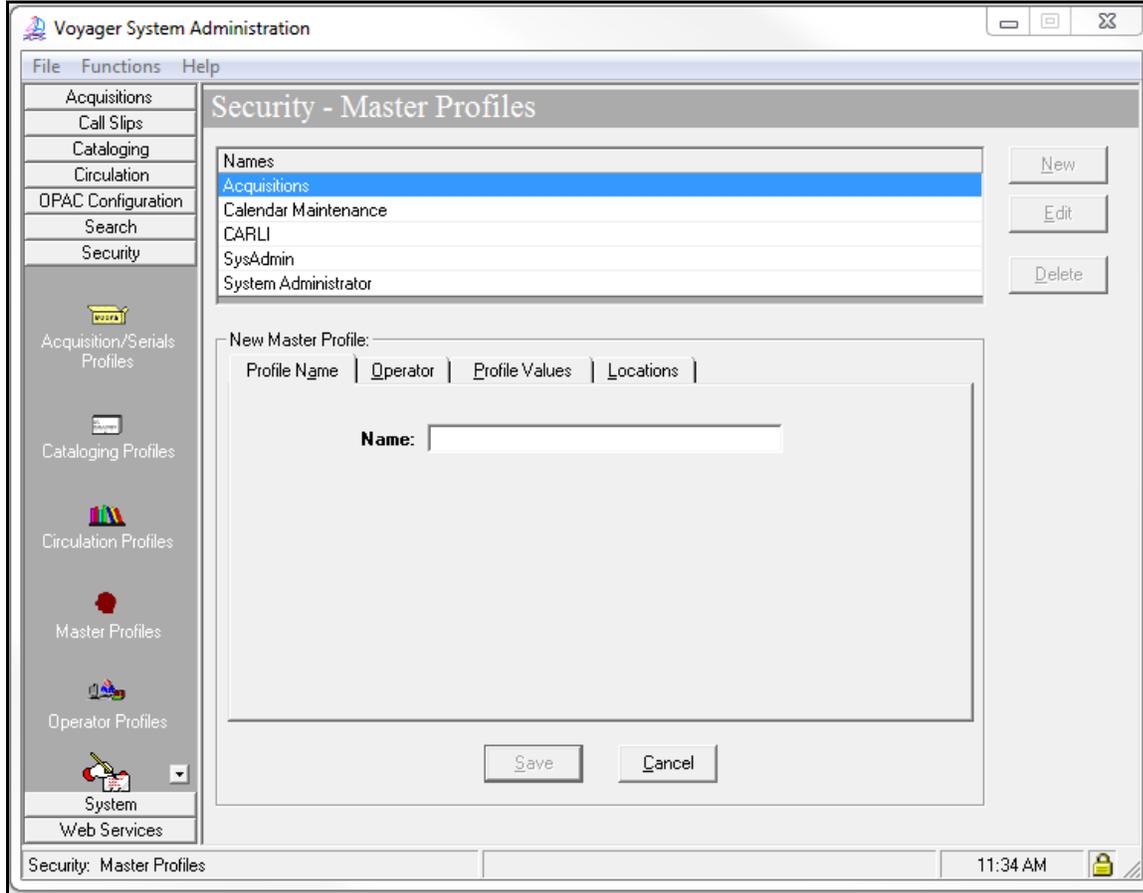
- The library may also create additional master profiles as needed to allow access to specific parts of System Administration by library staff.
- For example, the library might create a master profile called "Circulation SysAdmin" that would have Profile values enabled for "Circulation Policy Groups" (and perhaps other values), but not "Cataloging Policy Groups". This would allow the operators associated with this profile to edit the library's Circulation Policy Definitions in SysAdmin, but prevent these operators from accessing the Cataloging section of SysAdmin.

When adding a new Master Profile, complete all 4 tabs in the order described below, and then click [Save].

Legend:

- ⊕ Consortial Rule for setting value(s)
- CARLI Recommendation for setting value(s)
- ∅ Does not apply; Or, Do not change this value

A. Profile Name Tab



Security- Master Profile- New Profile, Profile Name Tab

⊕ **Give the new Profile a Name that is indicative of the authorization levels and SysAdmin modules associated with it (examples include: AllSysAdmin, CircSysAdmin, CatSysAdmin).**

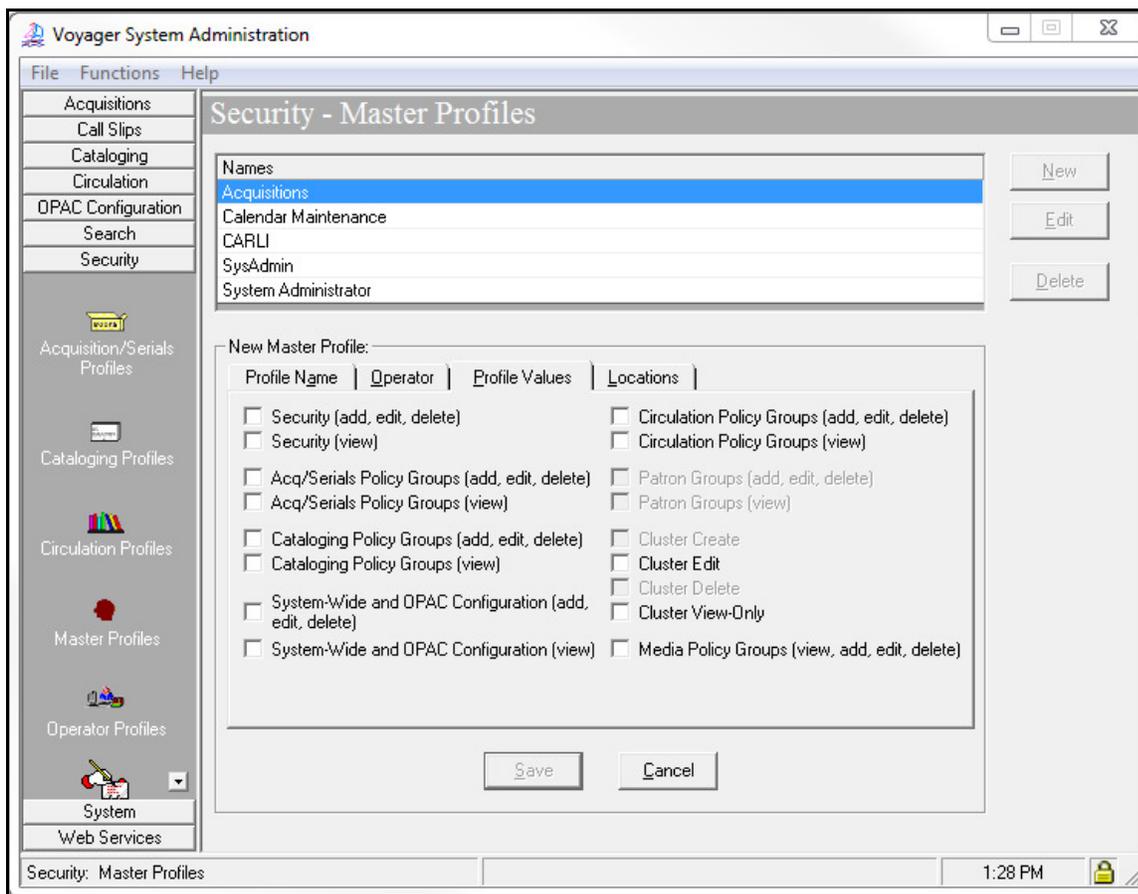
- There is a 25 character limit to the profile name.
- If the profile will be limited to specific locations within the library, name the profile to denote the location distinction. For example, if the library has both a Main and Branch library, and the Master profiles include limitations based on locations, the library may wish to create both a *MainCircSysAdmin* and a *BranchCircSysAdmin* profile.
- If the master profile is being created for an individual or staffing level, the name should be indicative of these titles (e.g., *Library Director*, *Circ Supervisor*).

Click on the Profile Values tab next. We'll come back to the Operator tab later.

Legend:

- ⊕ Consortial Rule for setting value(s)
- ☑ CARLI Recommendation for setting value(s)
- ∅ Does not apply; Or, Do not change this value

B. Profile Values Tab



Security- Master Profile- New Profile, Profile Values Tab

Review pages 9-24 through 9-30 of the *Voyager 9.1.1 System Administration User's Guide* for more information about Master Profiles > Profile Values Tab.

When you create a new Master Profile, by default, all options are unchecked/disabled. Check the options that are applicable to the new master profile. Master profiles can be set up to include any combination of these options.

☑ CARLI recommends that a library have a minimum of two Operators with the Master *Profile Value* of *Security (add, edit, delete)* options enabled. However, enabling this value for more than two Operators should be carefully considered.

- The *Security (add, edit, delete)* option is extremely powerful and should not be assigned to many people.
- This authorization allows the operator to create, change, and delete individual Operator accounts in the database. It also has permission to change all Operators' passwords.

Legend:

- ⊕ Consortial Rule for setting value(s)
- ☑ CARLI Recommendation for setting value(s)
- ∅ Does not apply; Or, Do not change this value

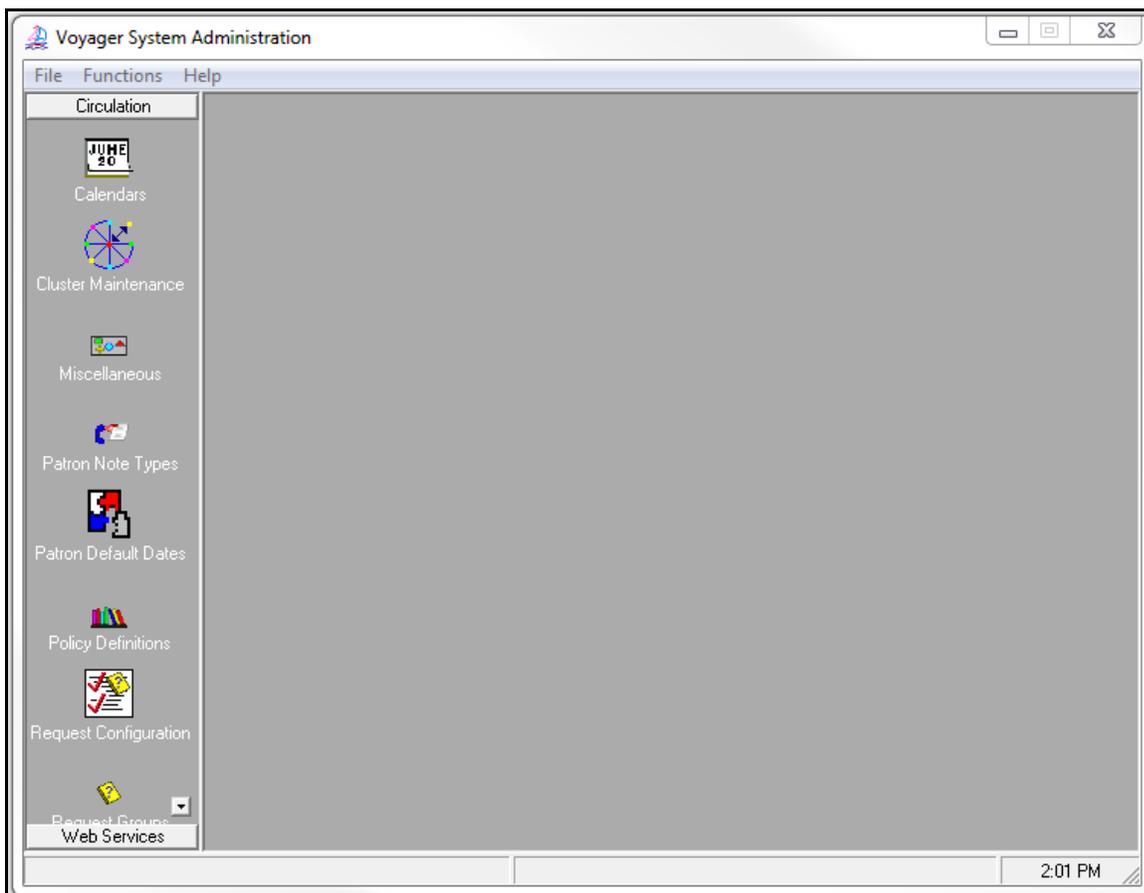
If an Operator's login is not associated with any Master Profile (i.e., their account is not authorized to have access to any parts of System Administration), if they attempt to log in to the SysAdmin client, their connection fails.

- No error message is generated in this case; the SysAdmin client just closes automatically after the login and password are entered.

If an Operator's login is associated with a master profile that allows access to some, but not all, parts of System Administration, when they log in to the SysAdmin client, their resulting screen display will only include the parts of SysAdmin to which their master profile grants access.

- For example: The "Media Supervisor" master profile in a generic Voyager training database has the following profile values selected:
 - Circulation Policy Groups
 - Cluster View-Only
 - Edit Patron Groups
 - Media Policy Groups

When an operator linked to this "Media Supervisor" master profile logs into SysAdmin, she sees the following display in her SysAdmin client.



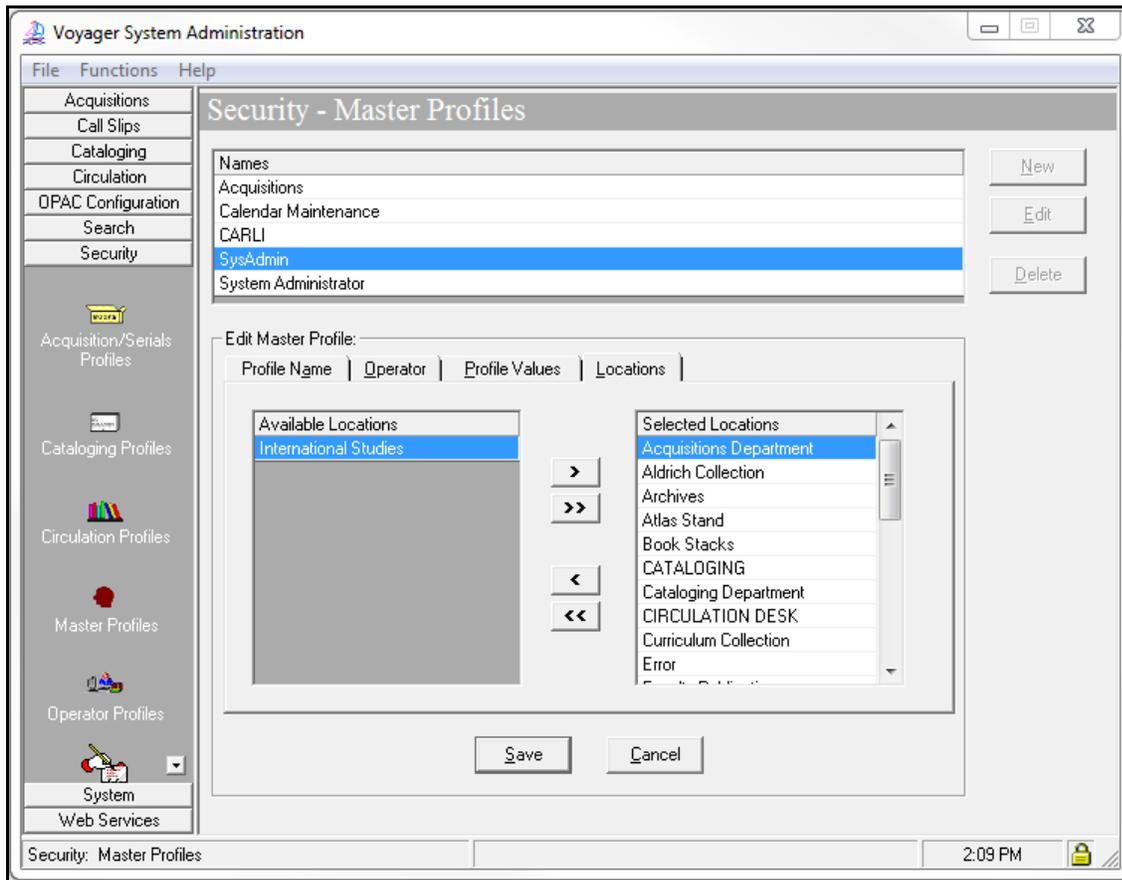
System Administration options for an operator with limited Master Profile permissions.

Note that this display contains many fewer options than the first screen shot in this document, which shows the display for an operator with access to all parts of SysAdmin.

Legend:

- ⊕ Consortial Rule for setting value(s)
- ☑ CARLI Recommendation for setting value(s)
- ∅ Does not apply; Or, Do not change this value

C. Locations Tab



Security- Master Profile- New Profile, Locations Tab

Review pages 9-9 through 9-11 of the *Voyager 9.1.1 System Administration User's Guide* for more information about location limits.

Assigning Locations in the Master Profiles allows an individual location to be included in the list of *Available Locations* in the other parts of SysAdmin.

- An example may be the best way to describe this functionality:
 - The library created a master profile named *Circ-SysAdmin* that on the Profile Values tab only has the *Circulation Policy Groups (add/edit/delete)* option checked/enabled.
 - On the Location Tab, the *International Studies* location, as pictured above, is not included in the *Selected Locations* box for this master profile.
 - Any operator linked to this profile, who is doing the *Circ SysAdmin* configuration, will not see the *International Studies* location listed in the *Available Locations* listing for the *Circulation Policy Groups* settings.
- The Available Locations box contains the locations that are not selected for this Master Profile. Operators assigned to this Master Profile are restricted from seeing this location listed in other sections of Voyager SysAdmin.
- The Selected Locations box contains locations that belong to the Master Profile currently being defined. Operators assigned to this Master Profile are will see these locations listed in other sections of Voyager SysAdmin.

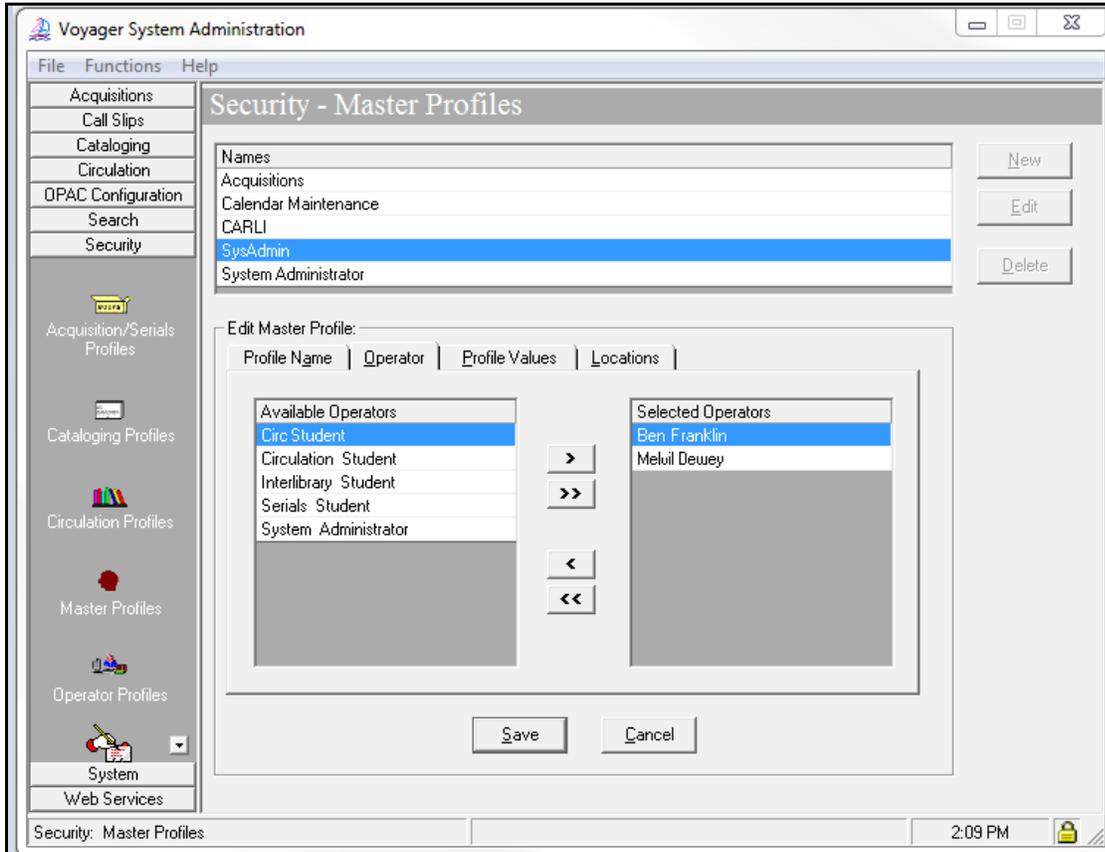
Legend:

- ⊕ Consortial Rule for setting value(s)
- ☑ CARLI Recommendation for setting value(s)
- ∅ Does not apply; Or, Do not change this value

Use the arrow buttons to move the locations between the Available and Selected boxes. Individual locations can be selected for use in more than one Acquisitions profile.

Libraries that have no need to restrict access to the individual parts of SysAdmin by location should select all locations for that profile.

D. Operator Tab



Security- Master Profile- New Profile, Operator Tab

This is where individual Operators are linked to their appropriate Master Profile. Use the arrow buttons to move the operators between the Available and Selected boxes.

IMPORTANT NOTE: not all Operators in a database should be included in a Master Profile. Only those staff who should have access to SysAdmin should be associated with a Master profile.

An individual Operator can only be associated with one Master Profile.

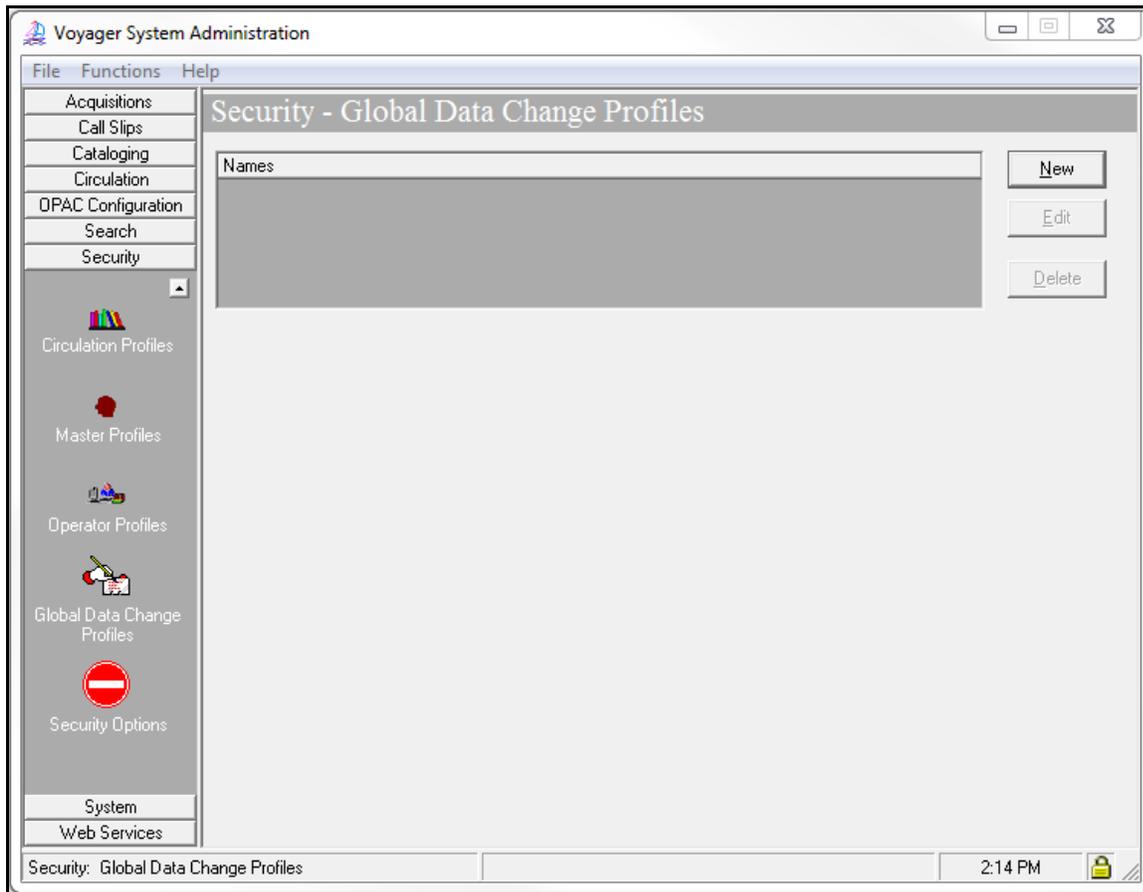
- In other words, the list of Available Operators includes accounts that have not been selected for any other Master Profile.
- If you do not see the operator you are looking for in the Available list, look at the operator's current profile tab in their SysAdmin> Security> Operator Profile to see which profile they currently belong to. Deselect them from that profile, to make them available for the new profile.

E. After all tabs have been populated for this profile, click Save.

Legend:

- ⊕ Consortial Rule for setting value(s)
- CARLI Recommendation for setting value(s)
- ∅ Does not apply; Or, Do not change this value

X. Global Data Change Profiles



Security- Global Data Change Profile- Current Profiles Tab

CARLI does not currently support Voyager's Global Data Change functionality.

∅ **CARLI recommends that you leave this section blank.**

Legend:

- ⊕ Consortial Rule for setting value(s)
- ☑ CARLI Recommendation for setting value(s)
- ∅ Does not apply; Or, Do not change this value