

Read Me—View Only Access


Tip for January 14, 2019

Has an administrator or principal asked for access to Alexandria to run reports or view patron data? What if you want to give them access, but you don't want them to mess anything up?

Easy. It's all in Security.

Go to Patron Management and open a patron record, then look at the **Security Group** underneath their picture. The group to which this patron is assigned dictates what they can and cannot do in Alexandria. Most of your users will be in a Patron group that allows access to Researcher but not Librarian. Others might be student aides or librarians with various security settings.

For an example, let's create a security group that is limited to View, or read-only, access.

1. Navigate to Tools > Preferences and click on **Security**.
2. On the left are all the security groups in your system. You can modify an existing group or create a new one. At the bottom, click  to add a new group.
3. Give the group a name that reminds you of the kind of access it allows and/or the users to whom it should be assigned. For this example, we'll name it *Read Only*.
4. Preset the security options to **All Off**, then click **Add**.
5. Go through the settings in each tab and, when necessary, change the settings to **View**.

Here are a few examples for this scenario:

- Patron Reports = Reporting tab > Librarian subtab > Patron Reports > View
- Circulation Reports = Reporting tab > Librarian subtab > Circulation Reports > View
- Statistics Reports = Reporting tab > Librarian subtab > Statistics Reports > View
- Patrons = Management tab > Patrons > View

That's it!