Security

[Tools](#)

- [Authority Control](#)
- [Inventory](#)
- [Sites](#)
- [Routes](#)
- [Subscriptions](#)
- [Calendars](#)
- [Policies](#)
- [Security](#)
- [Activity](#)
- [Offline Mode](#)
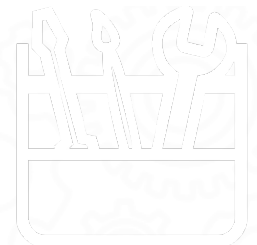- [Self-Service](#)
- [Textbook Tracker](#)

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> ⓘ this page has been moved to https://support.goalexandria.com/tools/security/

Security

Security preferences allow operators (with the appropriate authority) to modify existing or create their own custom security groups by manipulating lists of permissions; these include Management (patrons/items), Tools, Circulation, Preferences, Reporting/Operations, and Researcher/Account settings. In turn, these Security Groups (assigned to individuals in Patrons Management) determine what actions operators or patrons are permitted to perform. By default, Administrator-level access are the only security groups that allows you to do this.

Sec

Security Groups

- District Administrator (0)
- **Library Administrator (1)**
- Textbook Administrator (1)
- Librarian (2)
- Textbook Manager (2)
- Library Staff (3)
- Library Aide (4)
- Bulletin Board Manager (5)
- Patron (5)
- Patron Limited (5)
- Self–Service (5)
- Student Aide (5)

Last Upd

Account | Management | Circulation | Tools | Operations | Preferences

Security Level	1 – Administrator ▾
Password Strength	Regular ▾
Patron Status	Edit Username and Password ▾
Holds	Manage ▾
Reservations	Manage ▾
Renewals	Perform ▾
Charges	Make Payment ▾
Reviews	Add – Always Approved ▾
Show Reviewer As	Full First and Full Last Name ▾

\+ − ⚙

New patrons will be automatically assigned to the Patron security group with minimal permissions. However, if the patron needs more access to Alexandria, you can change their assigned group to one that grants more appropriate permissions. You can change any security group, with the exception of Patron, to allow the user to log in as an operator.

The very first operator that you should create is the District or Library Administrator. Don't forget to set up a strong username and password for this person, since it must be used to examine, edit, add or delete other patrons or operators.

If you haven't yet created a District Administrator for your union site, the very first time that you attempt to access the program or one of its online components (e.g. /preferences), you'll be tasked with creating an Administrator-level operator that may be later edited, but never removed. Your first operator needs to be a District Administrator with the equivalent Security Group. The District Administrator security group is only meaningful for multi-library collection licenses (Centralized Catalog, WAN, etc.). For all other licenses, the District Administrator security group is analogous to the Library Administrator.

Want to see how it works? Check out our Security Preferences video.

Security Groups

The Security Groups pane on the left side of the screen lists each of the default and custom security groups that are set up for your site. These can be assigned to your operators and patrons in Patrons Management. Operators with the appropriate authority can add, duplicate, edit, or remove any of the custom security groups for your site.

Each group is assigned different default settings. Default security groups, listed below, can be edited but cannot removed or renamed.

District Administrator

Full access to every control and setting within Alexandria, including the ability to examine and change registered operators. Operators at this level can edit district-level preferences and have access to all library preferences. All other access levels can only modify records from their assigned library collections. The District Administrator security group cannot be removed or modified.

Library Administrator

Full access to every control and setting within Alexandria, including the ability to examine and change registered operators. Operators with this security group can only edit preferences for their assigned collection.

Librarian

Full access to every control and setting within Alexandria and Textbook Tracker, except the ability to examine registered operators and Address Books.

Textbook Library Administrator

Full access to every control and setting to manage textbooks within Alexandria. Operators with this security group can only edit preferences for their assigned collection.

Textbook Librarian

Full access to nearly every control and setting to manage textbooks within Alexandria. They do not have access to SIF,

Library Staff

Access to all system functions and reports, except for Preferences, Imports, and Utilities.

Library Aide

Access to Alexandria Librarian capabilities and standard circulation commands, with the authority to allow restricted actions. For example, if a patron has too many books issued, a warning message appears when the patron tries to check out another book. With this security group, the library aide can override the message and allow the patron to check out another book.

Bulletin Board Manager

Patron-level access with the ability to manage holds, reservations, perform renewals, and add reviews.

Patron (default)

This is the default security group for all newly created patrons. The only settings that can be modified in this security group are permissions for their own patron account, such as the ability to place holds and reservations when using Researcher.

Patron Limited

For convenience, this is essentially the same as the Patron security group, but you are able to modify most permissions.

Self-Service

Supports Student Aide privileges with the addition of the Check In and Bookdrop circulation commands. The Circulation window is allowed for Bookdrop mode only. At this security level, overdue fines are automatically recorded with no opportunity to accept payment or forgive/adjust fines. Fines are still displayed in the transaction log.

Student Aide

Access to Alexandria Librarian capabilities and standard circulation commands, but no authority to allow restricted actions

Controls

The controls for your security groups are at the bottom of the list. Only users with the appropriate security group settings can add, remove, or duplicate security groups.

Add a new security group that isn't based on an existing group.

Specify a Security Group name.

Would you like to preset the security options to all on or all off?

All On. *Each preference will be set to the option with the least restricted access.*

All Off. *Each preference will be set to No Access or the option with the most restricted access. Users will not have access to:*

- *Management tab > Patron Passwords, Library Copies, and Textbook Copies*
- *Preferences tab > Security, Z39.50 Server, Policies, and Calendar*

Remove the currently selected security group. Default groups cannot be removed. If the security group is still in use, you'll be prompted to choose a replacement security group for the impacted patrons.

Actions to rename or duplicate the security group you've selected.

Permissions

On the right side of the window, security settings are grouped by tabs.

- Management
- Tools
- Circulation
- Preferences
- Reporting
- Account

Use the dropdown menus in each tab to enable or disable security preferences for the group you've selected. For each permission, users assigned to that security group will have access to/can perform the functions they've they've been assigned *plus* all lower-level actions/functions listed above.

Account
Account

These settings define what a user assigned to this security group will have access to. Settings in the dropdown menus are listed top to bottom from least to most access.

- 5- Patron
- 4- Aide
- 3- Staff
- 2- Librarian
- 1- Administrator
- 0- District Administrator

When set, patron passwords must meet the following requirements:

- **None**: no requirements
- **Weak**: At least 6 characters.
- **Regular**: At least 8 characters, including at least one letter (a-z) and one number (0-9).
- **Strong**: At least 10 characters, including at least one letter (a-z), one number (0-9), and one symbol (!@#$%^&*-=+.,).

Passwords are not case sensitive.

- No Access
- Basic Access currently this means you can not view contact /password information at all.
- View Contact Information can view your Account tab with contact information but can not edit it.
- Edit Contact Information
- Edit Username and Password
- Edit

- No Access
- Manage edit and remove your own holds

- No Access
- Manage edit and remove your own reservations

- No Access
- Make Payment

  - *A patron can pay charges with their available credit.*

- No Access
- Perform renew your library items out (does not apply to Textbooks Out)

- View can see reviews but can not Add or Edit their own reviews

- Add - Requires Approval also allows user to Edit their own reviews
- Add - Always Approved also allows user to Edit their own reviews

- Anonymous
- Initials
- Full First Name and Last Name Initial
- Full First and Full Last Name

Management
Management

These settings define what a user assigned to this security group will have access to. Settings in each dropdown menu are listed top to bottom from least to most access.

- No Access
- Restart
- Quit
- Database Utilities
- Export
- Update
- Manage

- No Access
- View
- Manage Notes
- Edit
- Add
- Remove
- Import, Export, and Utilities

- No Access
- Edit

- No Access
- View
- Edit
- Add
- Remove
- Import, Export, and Utilities

- No Access
- View
- Manage Notes
- Edit
- Add
- Remove

- No Access
- View
- Manage Notes
- Edit
- Add
- Remove

- No Access
- View
- Manage Notes
- Edit
- Add
- Remove

- No Access
- Manage

- No Access
- View
- Edit
- Remove

Account	**Management**	Circulation	Tools	Operations	Preferences

Data Station Management	Update
Patrons	Import, Export and Utilities
Patron Passwords	Edit
Library Items	Import, Export and Utilities
Library Copies	Remove
Textbook Items	No Access
Textbook Copies	View
Builder	Manage
Reviews	Remove
Maps	Remove
Explore Builder	Import and Export
Bulletin Builder	Remove

- Remove
- View
- Edit
- Add
- Remove

- No Access
- View
- Edit
- Add
- Remove
- Import, Export, and Utilities
- Import and Export

- No Access
- View
- Edit
- Add
- Remove

> ✓ Security Level controls which security groups a user can modify. For example, patrons assigned a security group with Security Level 2 can only modify groups with a Security Level of 3 or lower (3, 4, 5). However, this rule does not apply to District Administrators (Level 0).

Circulation
Circulation

These settings define what a user assigned to this security group will have access to. Settings are listed top to bottom from least to most access.

- No Access
- Perform
- Import, Export and Utilities

- No Access
- Perform
- Import, Export and Utilities

- No Access
- Perform

- No Access
- Use

- No Access
- View
- Manage

- No Access
- Perform

- No Access
- View
- Manage

| Account | Management | **Circulation** | Tools | Operations | Preferences |

Library Circulation	Import, Export and Utilities ▾
Textbook Circulation	Import, Export and Utilities ▾
Circulation Override	Perform ▾
System Patrons	Use ▾
Reservations	Manage ▾
Advanced Bookings	Perform ▾
Holds	Manage ▾
Charges	Charge Fee ▾
Payments	Refund ▾
Cash Drawer	Use ▾
In Transit	Add ▾
Self Service	Check In and Out ▾

- No Access Cannot view charges or make payments.
- View Can view charges, but cannot make payments.
- Make Payment Can make a payment.
- Forgive Charges Can forgive (waive) all or part of any outstanding balance for fees and fines.
- Charge Fee Can charge an additional fee.

- No Access Cannot view charges or history, process refunds, or add credit. When a lost item is bookdropped, any charges will be posted to the patron's account automatically.
- View Can view charges in Circulation > History subtab. Cannot process refunds or add credit. When a lost item is bookdropped, any charges will be posted to the patron's account automatically.
- Add Credit Can add credit in the Circulation > History subtab. Cannot refund previous payments to credit.
- Refund Can refund previous payments.

- No Access

- Use

- No Access
- Edit
- Add

- No Access
- Check In Only
- Check Out Only
- Check In and Out

Tools
Tools

These settings define what a user assigned to this security group will have access to. Settings are listed top to bottom from least to most access.

- No Access
- Remove

- No Access
- View
- Edit
- Add
- Remove

- No Access
- View
- Edit
- Add
- Remove

- No Access
- View
- Edit
- Add
- Remove

- No Access
- Manage

- No Access
- Perform

- No Access
- View

- No Access
- View
- Edit
- Add
- Remove
- Import, Export and Utilities

- No Access
- View
- Edit
- Add
- Remove
- Import, Export, and Utilities

Operations
Operations

These settings define what a user assigned to this security group will have access to. Settings are listed top to bottom from least to most access.

Librarian

- No Access
- View Personal
- View All
- Manage All

- No Access
- View
- Edit
- Add
- Remove

- No Access
- View
- Edit
- Add
- Remove

- No Access
- View
- Edit
- Add
- Remove

- No Access
- View
- Edit
- Add
- Remove

- No Access
- View
- Edit
- Add
- Remove

- No Access
- View
- Edit
- Add
- Remove

- No Access
- View
- Edit
- Add
- Remove

- No Access
- View
- Edit
- Add
- Remove

Account	Management	Circulation	Tools	Operations	Preferences

Librarian	Textbook Tracker

Operations	Manage All
General Notices	Remove
General Labels	Remove
Patron Labels	Remove
General Reports	Remove
Patron Reports	Remove
Circulation Reports	Remove
Special Reports	Remove
Legacy Reports	Remove

Textbook Tracker

- No Access
- View
- Edit
- Add
- Remove

- No Access
- View
- Edit
- Add
- Remove

- No Access
- View
- Edit
- Add
- Remove

- No Access
- View
- Edit
- Add
- Remove

Account | Management | Circulation | Tools | **Operations** | Preferences

Librarian | Textbook Tracker

General Notices — No Access
General Labels — No Access
Patron Labels — No Access
General Reports — No Access
Patron Reports — No Access
Circulation Reports — No Access
Special Reports — No Access
Legacy Reports — No Access

- No Access
- View
- Edit
- Add
- Remove

- No Access
- View
- Edit
- Add
- Remove

- No Access
- View
- Edit
- Add
- Remove

- No Access
- View
- Edit
- Add
- Remove

Preferences
Preferences

These settings define what a user assigned to this security group will have access to. Settings are listed top to bottom from least to most access.

- No Access
- Edit
- Import and Export

- No Access
- View
- Edit
- Add
- Remove

- No Access
- Edit
- Import and Export

- No Access
- Manage

- No Access
- Manage

⚠ This setting defaults to **No Access** for security levels 2, 3, 4, and 5, and **Manage** for security levels 1 and 0.

- No Access
- Edit

- No Access
- Edit

- No Access
- Edit

Account | Management | Circulation | Tools | Operations | **Preferences**

Library System Preferences — Import and Export
Z39.50 Server — Remove
Textbook System Preferences — No Access
SIS Integrations — Manage
Setup — Manage
Library Site Preferences — Edit
Textbook Site Preferences — No Access
Browser Preferences — Edit