



## **How To Limit Staff to Specific Budgets Based on Sub-library**

**Releases 12.2 – 12.4**

**Last update: 18 September, 2000**

## Table of Contents

<b>LIMITING BUDGETS TO SPECIFIC SUB-LIBRARIES .....</b>	<b>4</b>
<b>PAYING ORDER RECORDS .....</b>	<b>7</b>
<b>PROXY .....</b>	<b>7</b>

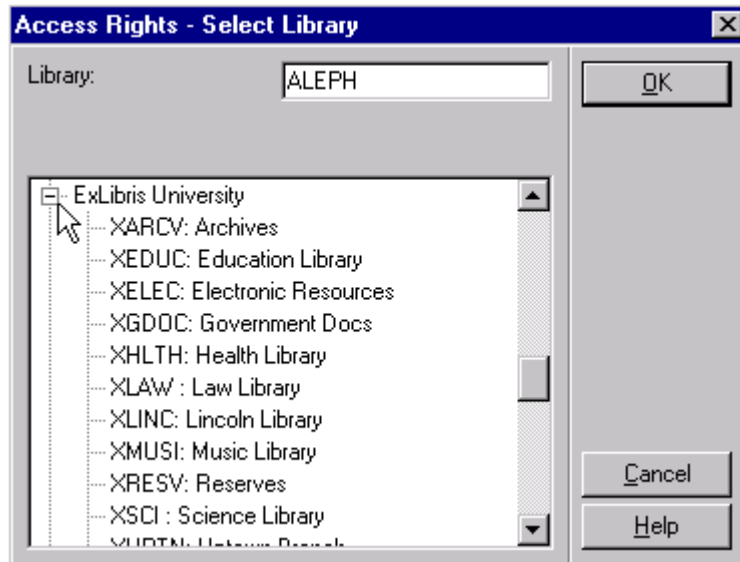
## **How to Limit Staff to Specific Budgets Based on Sub-library**

It is possible to prohibit library staff from one sub-library from editing, deleting and paying from the budget of another sub-library.

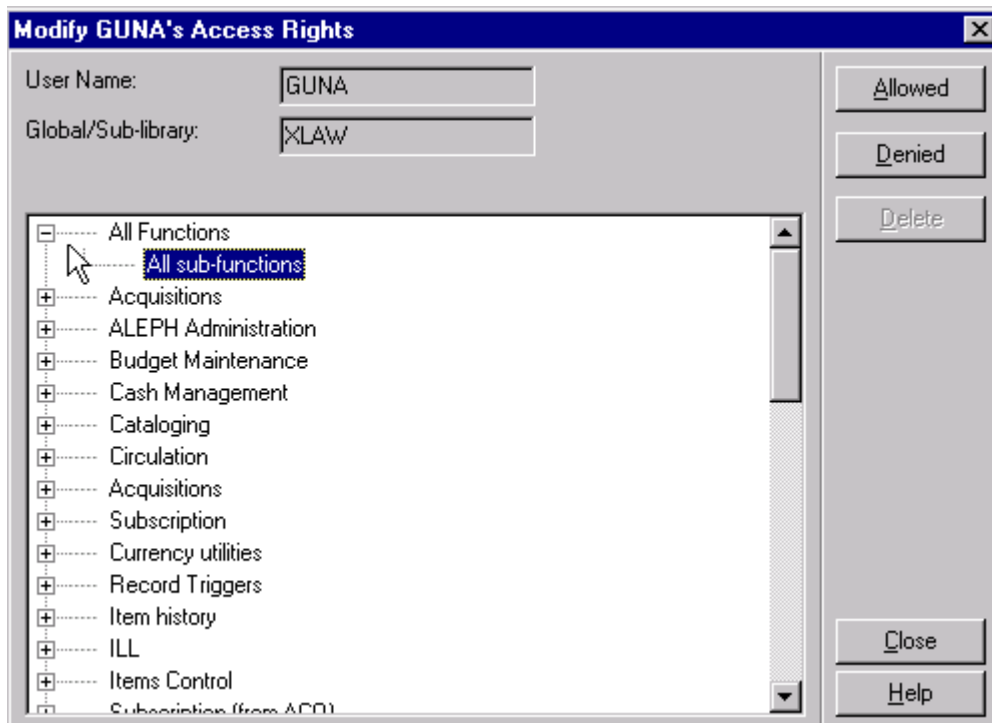
To limit a budget's access, you must assign a sub-library to that budget. However, those budgets which are open to all libraries do not have to be assigned to sub-libraries.

## Limiting Budgets to Specific Sub-libraries

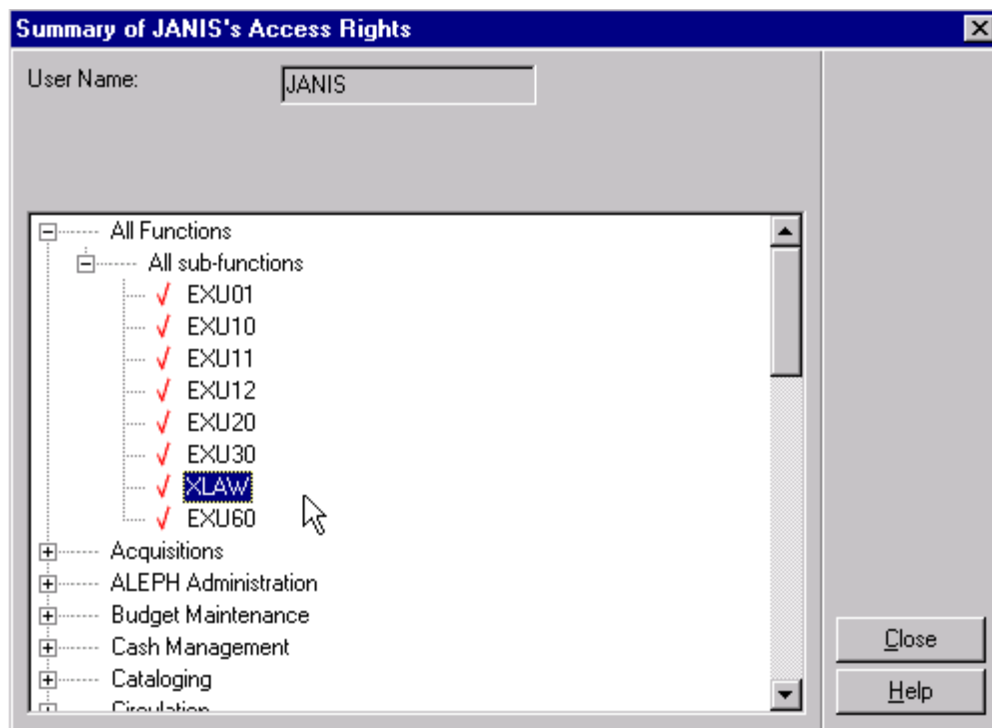
To limit a budget to a certain sub-library, you must first limit a user's permissions to those sub-libraries to which he/she has access rights. This is done in the Administration module in the **User Permissions**. Select an existing user to modify or create a new user and press the “**Access Rights**” button to access the following window:



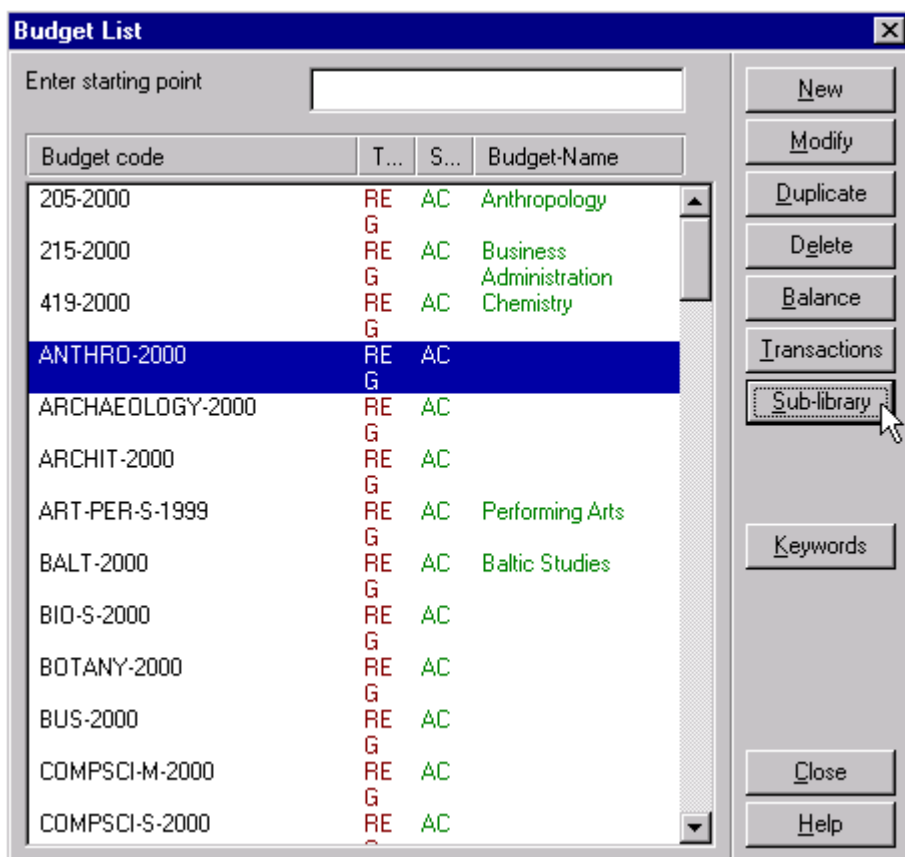
Select the libraries (i.e., iow01, iow50, etc.) and sub-libraries (law, music, etc.) you want this user to have access to. Press **OK** and the **Modify Access** window will appear:




Select the functions and sub-functions to which the user should have access. In the testing process, a user was created who had access only to Law library budgets. This hypothetical user was given access to EXU01, EXU10, EXU20, EXU30, EXU60 and only the sub-library XLAW in the EXU50 library. The following example gives a summary of this user's access rights:

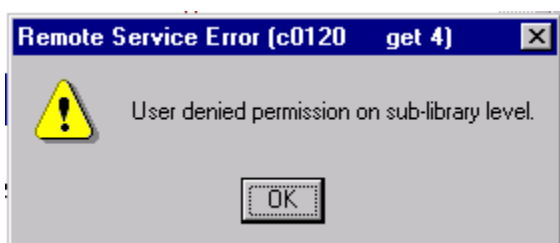


Once you have defined permission for a user, you must then limit which sub-libraries have access to which budgets. This is also done from the Administration module. Select a budget from the **Budget List** and click the **Sub-library** button.



This will open the **Sub-library Management** window. Here you can select a sub-library to assign to the selected budget. To assign the sub-library, highlight the sub-library in the right-hand column and press the  button. This will move the sub-library to the left-hand column and also will assign the budget to that sub-library.

Once you have completed these steps, you should be able to limit sub-library access to budgets. For example, the user Janis has access only to the law sub-library. If I log on as Janis and try to access a budget which is assigned to a different sub-library, the system will display the following error message:



**Note:**

In order to limit access, every budget must be assigned to a sub-library, except for those budgets to which all sub-libraries are permitted access.

## Paying Order Records

In addition, by setting up user permissions in this way and by assigning a budget to a sub-library, you can limit paying orders from acquisitions to a specific sub-library. For example, user Janis, who has access only to Law budgets, may create an order and encumber a law library budget. He is able to encumber the budget and send the order. On the other hand, user Guna, who does not have access to law library budgets, may attempt to create an order, select the archives sub-library and encumber a law budget. However, he will be unable to complete the order and subsequently he will receive the following error message:

The screenshot shows a window titled "Order Form - Architecture in the family way : doctors, houses, and women 1870-1900 / A...". The window has three tabs: "Order Information", "Vendor", and "Quantity and Price". The "Order Information" tab is active. It contains the following fields and controls:

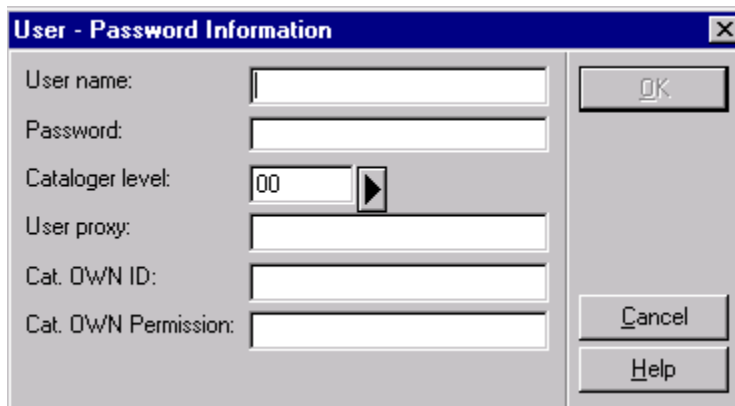
- Order quantity: (label)
- Number of units:
- Unit price:
- Total price:
- Quantity note:
- ☒ Create Item Records
- Item collection:
- Estimated price: (label)
- Currency:
- List Price:
- Terms sign (+/-):
- Terms percent:
- Final Price:
- Local price:
- Price note:
- Encumber budget:

Buttons on the right side of the form include: OK, Save Def, Refresh, Cancel, and Help.

At the bottom of the form, a red error message is displayed: "Budget ANTHRO-2000 sub-library does not match orders."

## Proxy

Finally, it is possible to create a single user for each sub-library, e.g., a Law – Acquisitions user, a Music – Acquisitions user, etc, and then link an individual user to the user record as a proxy. When you create a new user, if you want him or her to have exactly the same access rights as another user, you must enter the proxy name in the **Proxy** field of the **User – Password Information** form.



The image shows a Windows-style dialog box titled "User - Password Information". It contains several input fields and buttons. The fields are: "User name:" with a text box, "Password:" with a text box, "Cataloger level:" with a text box containing "00" and a right-pointing arrow button, "User proxy:" with a text box, "Cat. O'WN ID:" with a text box, and "Cat. O'WN Permission:" with a text box. On the right side of the dialog, there are three buttons: "OK", "Cancel", and "Help".

Note that if you assign a proxy to the selected user, you will not be able to define access rights for that user. Rather, he will automatically receive the same access rights as the proxy. In order to change access rights for the selected user, you must change the access rights for the proxy. Any number of users may be assigned the same proxy. If you change the access rights for the proxy, the access rights of all users having this proxy will also be changed.