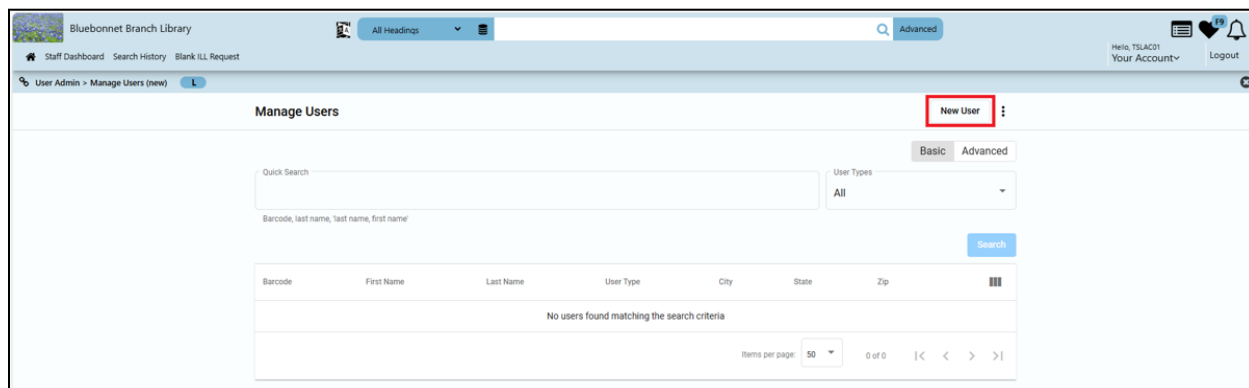


Managing Library Staff Accounts in SHAREit

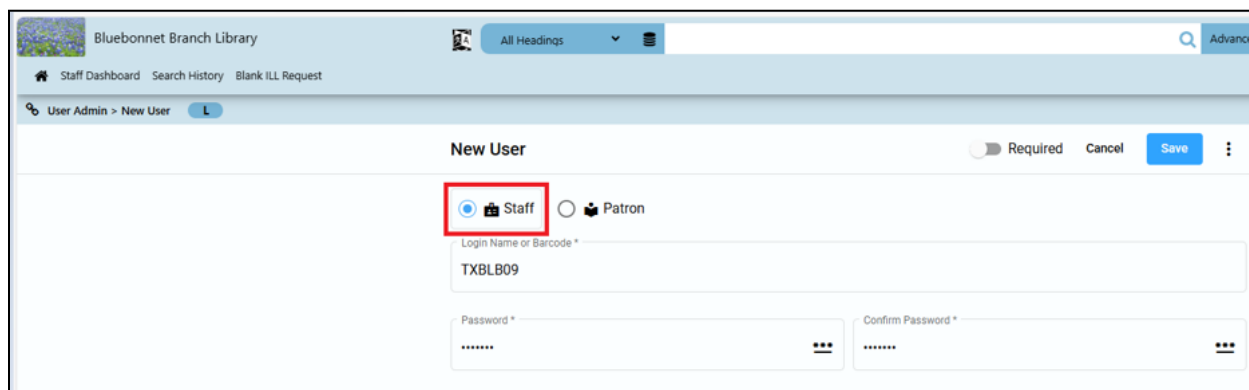
Adding a library staff account

1. From the Staff Dashboard, open the User Admin menu and select Manage Users.
 - a. The Manage Users screen displays with a New User option in the upper right hand corner



The screenshot shows the 'Manage Users' interface. At the top right, there is a 'New User' button highlighted with a red box. Below it are 'Basic' and 'Advanced' tabs. A search bar is present with a 'Search' button. A table below the search bar shows no results. The bottom of the page has pagination controls.

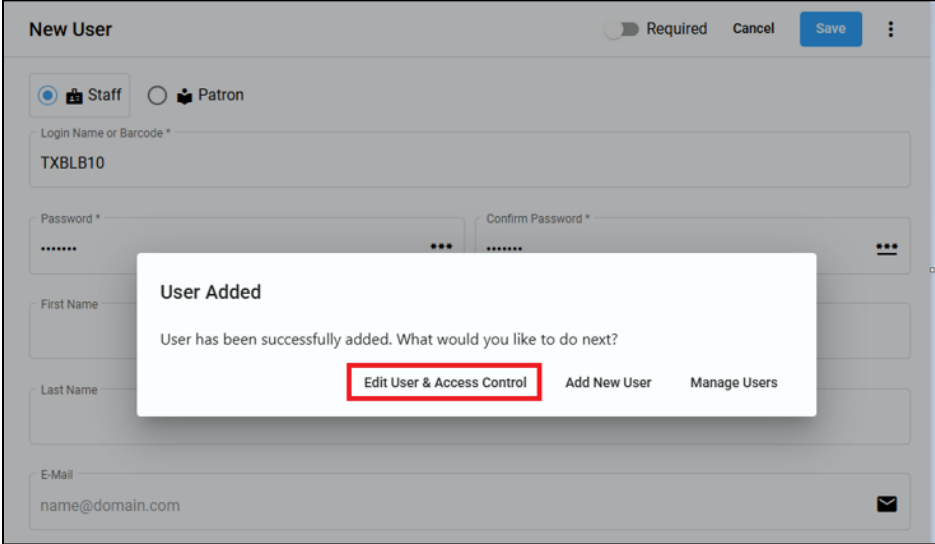
2. Select Staff from the Staff/Patron option.
 - a. Staff user definition: User can access the system as an authenticated staff member, with access to one or more staff modules (see the System Basics User Guide for details)
 - b. Please note: A user can be either a Staff or Patron user. A user cannot have access as both types of user



The screenshot shows the 'New User' form. At the top, there are 'Required', 'Cancel', and 'Save' buttons. Below them are two radio buttons: 'Staff' (selected and highlighted with a red box) and 'Patron'. Below the radio buttons are three text input fields: 'Login Name or Barcode *' (containing 'TXBLB09'), 'Password *' (masked with dots), and 'Confirm Password *' (masked with dots).

3. Create and enter a username for the new user in the Login Name or Barcode text box.
4. Enter a password for the new user in the Password and Confirm Password text boxes.
5. Additional fields are optional:

- a. If the Library Staff account will be associated with one specific individual, suggested fields to fill out are: First Name, Last Name, E-Mail, and Work Phone
 - b. If this same Library Staff account will be used simultaneously by multiple users, select the “Is an Institution” checkbox
 - c. Ensure Enable is selected from the Account Status drop-down menu
6. When all desired information for the user has been entered, click the Save button to add the new user to your library’s database.
 - a. The User Added confirmation dialog box displays the message “User has been successfully added. What would you like to do next?”
7. Select the desired option from the User Added dialog:
 - a. Click Edit User and Access Control to display the Edit User screen for the newly added user (see Editing User Records on page 17 for details)
 - b. Click Add New User to display the New user form. Repeat the above steps to add another user
 - c. Click Manage Users to return to the Manage Users screen (see Manage Users on page 9 for details)



The screenshot shows a web interface for adding a new user. The main form is titled "New User" and includes fields for "Login Name or Barcode" (containing "TXBLB10"), "Password", "Confirm Password", "First Name", "Last Name", and "E-Mail" (containing "name@domain.com"). There are radio buttons for "Staff" (selected) and "Patron". At the top right of the form are buttons for "Required", "Cancel", and "Save". A white modal dialog box titled "User Added" is centered over the form. It contains the text "User has been successfully added. What would you like to do next?" and three buttons: "Edit User & Access Control" (highlighted with a red rectangle), "Add New User", and "Manage Users".

Access Control

1. On the Edit User screen for the desired staff user, select Change User Type to assign access to features and functions. All staff users will have Support access and permission by default.

- a. For ILL Staff accounts, we suggest selecting: ILL Staff, User Admin, Statistics (if applicable), CAT Admin (if applicable)
- b. For Public Service/Circulation Staff accounts, we suggest selecting: ILL Staff

Change User Type

User Types control access to Patron or Staff features and functions

User Type *

Staff

Select All

Deselect All

Library Superuser	☐
CAT Staff	☐
ILL Staff	☒
PAC Admin	☐
Patron Admin	☐
Staff Admin	☒
Statistics	☐

Cancel

Save

2. On the Edit User screen, select Access Control to edit permissions and settings within each staff mode assigned to the user. Permissions granted to the current user are indicated by a checkmark next to the permission name. By default, staff users are initially granted permission to all features and functions for a user type (staff mode) to which they are assigned.
3. Refer to the following paragraphs to determine whether a permission should be granted or removed for a given user.
 - a. **CAT Admin** – see [Modifying CAT Admin Permissions](#) on page 24 and [Modifying CAT Admin Settings](#) on page 25
 - b. **ILL** – see [Modifying ILL Admin Permissions](#) on page 28 and [Modifying ILL Admin Settings](#) on page 30
 - c. **PAC Admin** – see [Modifying PAC Admin Permissions](#) on page 31
 - d. **Statistics** – see [Modifying Statistics Permissions](#) on page 33

- e. **User Admin** – see Modifying User Admin Permissions on page 34
- 4. When permissions for all desired user types (staff modes) for the active user have been configured, click Save to submit your changes to permissions and close the Access Control screen. Click Cancel to discard your changes and close the Access Control screen.
- 5. The message “User settings updated successfully” displays briefly at the bottom of the screen.

Example of ILL Staff Account Settings for Circulation Staff

Circulation staff include those that will perform functions like submitting requests, receiving items from other libraries, return borrowed items, and supply lending requests.

Users can access all functions within the ILL Administration module. By default, ILL settings are limited to Automatic approval, Change own library, Originate borrow requests, Originate copy requests, Respond to own request and View own request permissions only.

CAT Admin

This module has a Permissions section and Settings Section.

We suggest circulation staff do not have access to Cat Admin permissions. We suggest CAT Admin settings are set to none.

The screenshot shows the 'Access Control' window with three tabs: 'Cat Admin', 'Permissions', and 'Settings'. The 'Cat Admin' tab is selected and highlighted with a black border. On the left side of the 'Cat Admin' tab, there is a list of user types: 'ILL Admin', 'Pac Admin', 'Statistics', 'Support', and 'User Admin'. The 'Permissions' tab is also highlighted with a black border. Below the 'Permissions' tab, there is a text instruction: 'To remove all access, remove the corresponding User Type.' Below this instruction, there is a list of permissions with checkboxes: 'Cat Admin', 'View Download Cart', 'Download AGCat Utility', 'Create New CAT Record', 'Set Workstation Printer', and 'Set Workstation Printer'. At the bottom right of the window, there are 'Cancel' and 'Save' buttons.

ILL Admin

This module has a Permissions section and Settings Section.

Suggested permissions to select are

- Request Manager
- Borrower Requests
- Lender Requests
- Search by Request Number
- Blank Request Form
- ALA Form
- Print Shipping Labels
- Print Bookstraps
- Search Library Information

Suggested settings to select are

- Approve a request
- Automatic approval
- Change pickup location
- Undo Request Statuses
- Originate borrow requests
- Originate copy requests
- Respond to Request

Access Control

Cat Admin

ILL Admin

Pac Admin

Statistics

Support

User Admin

Permissions

Settings

To remove all access, remove the corresponding User Type.

☒ ILL Admin

- ☒ Request Manager
- ☒ Borrower Requests
- ☒ Lender Requests
- ☒ Search by Request Number
- ☐ Participant Record
- ☒ Blank Request Form
- ☒ ALA Form
- ☒ Print Shipping Labels
- ☒ Print Bookstraps
- ☒ Search Library Information
- ☐ ILL Request Limits
- ☐ Set Workstation Printer
- ☐ Configuration

Access Control

Cat Admin

ILL Admin

Pac Admin

Statistics

Support

User Admin

Permissions

Settings

ILL Permissions

- ☐ Check/Uncheck All
- ☒ Approve a request
- ☒ Automatic approval
- ☐ Cancel/Change request
- ☐ Change own library
- ☒ Change Pickup Location
- ☒ Undo Request Statuses
- ☒ Originate borrow requests
- ☒ Originate copy requests
- ☐ Patron request tracking
- ☒ Respond to request
- ☐ View own request
- ☐ Edit locally owned handling method

PAC Admin

This module only has a Permissions section.

We suggest circulation staff do not have access to PAC Admin permissions.

Access Control

Cat Admin

ILL Admin

Pac Admin

Statistics

Support

User Admin

Permissions

To remove all access, remove the corresponding User Type.

- ☐ Pac Admin
 - ☐ Modify My Library Profile
 - ☐ Lists
 - ☐ Full Record Display Profiles
 - ☐ Define Resource Headings
 - ☐ Search Resources
 - ☐ Define/Maintain Scoping Levels
 - ☐ Define/Maintain Location Groups
 - ☐ Select Library Search Indexes

Cancel Save

Statistics

This module only has a Permissions section.

Suggested permissions to select are

- Reports (New)

Access Control

Cat Admin

ILL Admin

Pac Admin

Statistics

Support

User Admin

Permissions

To remove all access, remove the corresponding User Type.

- ☒ Statistics
 - ☒ Reports (new)
 - ☐ ILL Statistics
 - ☐ Activity and Request Reports
 - ☐ CONTU Copyright Tracking Reports
 - ☐ Borrower Statistics
 - ☐ Borrower Record Counts
 - ☐ Borrower Days to Receive Report
 - ☐ Lender Statistics
 - ☐ Lender Record Counts
 - ☐ Lender Days to Supply Report
 - ☐ Stayed Too Long Report
 - ☐ Searches with Zero Results
 - ☐ Database Statistics

Cancel Save

Support

This module only has a Permissions section.

All options are selected by default and cannot be changed.

Access Control

Cat Admin

ILL Admin

Pac Admin

Statistics

Support

User Admin

Permissions

To remove all access, remove the corresponding User Type.

- ☒ Support
 - ☒ User Guides and Videos
 - ☒ MONTAGE
 - ☒ RESEARCHit
 - ☒ SHAREit
 - ☒ VERSO
 - ☒ Release Notes & Bulletins
 - ☒ Utility Downloads
 - ☒ Customer Care

Cancel Save

User Admin

This module only has a Permissions section.

We suggest circulation staff do not have access to User Admin permissions.

Access Control

Cat Admin

ILL Admin

Pac Admin

Statistics

Support

User Admin

Permissions

To remove all access, remove the corresponding User Type.

- ☐ User Admin
 - ☐ Manage Users (new)
 - ☐ Maintain RPA Error Codes
 - ☐ Delete Obsolete Records
 - ☐ User Registration Duplicate Checking
 - ☐ User Reports
 - ☐ Patron Categories
 - ☐ Patron Groups
 - ☐ Default User Password

Cancel Save