Ongoing use of permissions

Learn how to modify the default permissions supplied with OLIB. Permissions are used to determine where in the system, a user has access. A default set of permissions are provided when OLIB is first set up but these can be fine tuned on an ongoing basis by the system manager and to a lesser extent, other staff users, e.g. privilege level 6.

Permissions can be set on these 'objects' in OLIB: Annotations, Folders, Records, Saved Searches, Workspaces, Domains, Methods, Layouts, Sheets.

The following lists the various actions you can carry out using the permissions system. The examples use 'Folders' but the same permissions options are available to all 'objects'.

View my permissions

For any of the objects in OLIB Web that you have access to, you can view your own permissions.

For example:

1. Open a Folder.
2. At the top of the screen, click on Permissions: My Permissions.
3. This displays your permissions on that 'object' e.g:

Permissions for "Sue" on folder "Reclassify (17)"

I am the owner

Change owner of an object

Users are allowed to change ownership of an object if they themselves are the owner or if they have a privilege level of System Administrator. You can use a search box to find the user by surname.

For example:

1. Open a Folder.
2. At the top of the screen, click on Permissions: Change Owner.
3. In the Change Owner popup enter the surname of the new owner.
4. As you type, a list of possible matches displays. Select the new owner and click Save:

Change owner of folder: "Reclassify (17)"

Current owner is "Janet"
New Owner:

WRIGHT, Sue

Start typing a user name or group name to get a list of possible matches.

**Simplified sharing of an object**

You can 'share' objects like folders or saved searches with other users. For example you may create a saved search on a particular subject and want to share the list of results with other cataloguers. OLIB Web has a streamlined way to grant View or Modify permissions and a more advanced share method (if you are the owner of a User Group).

For example:

1. Open a Folder.
2. At the top of the screen, click on Permissions: Share.
3. In the Share popup, in user/group enter the surname of the new owner to display a list of possible matches.
4. Select the user or group you want to share with and click Save.

**Allow Viewing / Modifying of folder "Reclassify (17)" by**

- the user/group

HIGGINS, Lindsey

Start typing a user name or group name to get a list of possible matches.

When that user next logs in to OLIB Web they will have access to the folder and will be able to modify it.

If you are the owner of a User Group, a slightly different popup allows you to allocate permissions to a group more easily:

**Allow Viewing / Modifying of folder "Reclassify (17)" by**

- the group
- the user/group

Cataloguers

Start typing a user name or group name to get a list of possible matches.

**Advanced management of an object's permissions**

This option allows all permissions to be managed - not just View / Modify. You can also Revoke permissions. It allows full control of exactly what permission is granted to which specific users. Advanced permissions are possible if the current user is able to grant or revoke any permissions on the 'object' at all.
To add a user or group that is not currently in the list, start typing the surname / name of the user / group and select it from the possible matches.

Simply toggle the tick box for the relevant permission / user combination:

For example:

1. Open e.g. a Folder.
2. At the top of the screen, click on Permissions: Advanced.
3. Any existing permissions are shown, users / groups are displayed in bold with permissions listed for each.
4. If for example the required group is not displayed, start typing the name in New Entry and select it from the matches found.
5. Alternatively, to search for an individual user, start typing the Surname, %Forename or %Barcode in New Entry and select it from the matches found. (Forename, Barcode require a preceding wildcard%. OLlib displays the barcode in any matches, to uniquely identify users.)
6. In Advanced Permissions use the tick boxes to apply the correct permissions and save the changes:

<table>
<thead>
<tr>
<th>PERMISSIONS ON RECORD</th>
<th>REVOKE</th>
<th>GRANT</th>
<th>MODIFY</th>
<th>ACCESS</th>
<th>CREATE RECORD</th>
<th>DELETE RECORD</th>
<th>GRANT ALL</th>
<th>REVOKE ALL</th>
<th>RESET</th>
</tr>
</thead>
<tbody>
<tr>
<td>ALL USERS GROUP</td>
<td>☐</td>
<td>☐</td>
<td>☐</td>
<td>☐</td>
<td>☐</td>
<td>☐</td>
<td>+</td>
<td>-</td>
<td>✗</td>
</tr>
<tr>
<td>Acquisitions</td>
<td>☐</td>
<td>☐</td>
<td>☑</td>
<td>☑</td>
<td>☑</td>
<td>☑</td>
<td>+</td>
<td>-</td>
<td>✗</td>
</tr>
<tr>
<td>Cataloguers</td>
<td>☐</td>
<td>☐</td>
<td>☑</td>
<td>☑</td>
<td>☑</td>
<td>☑</td>
<td>+</td>
<td>-</td>
<td>✗</td>
</tr>
<tr>
<td>Librarians</td>
<td>☐</td>
<td>☐</td>
<td>☑</td>
<td>☑</td>
<td>☑</td>
<td>☑</td>
<td>+</td>
<td>-</td>
<td>✗</td>
</tr>
</tbody>
</table>

Start typing a user name or group name to get a list of possible matches.

Grant All inserts all permissions except Grant and Revoke, for that user / group.

Revoke All removes all permissions for that user / group.

Reset to revert to original settings.

See also how this way of granting permissions is used to set permissions in Domains.