

REMOTE SERVICE ERRORS & PERMISSIONS

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Oct 28, 2013 / 1-2 pm

SESSION DESCRIPTION



This session will identify why remote service errors are encountered and what may be done to prevent and/or make them disappear

In addition, we'll talk about Permissions

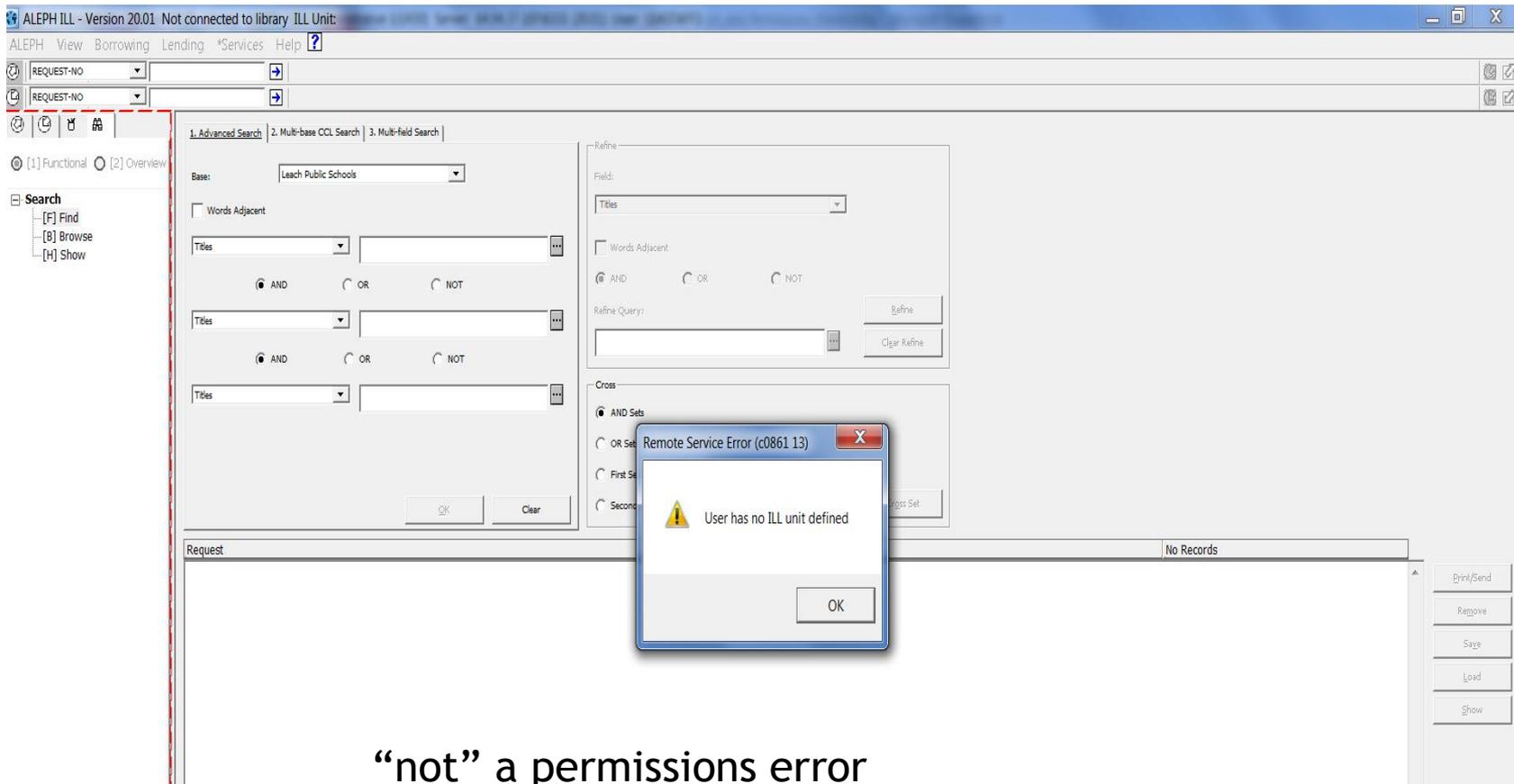


REMOTE SERVICE ERRORS

- ◉ Come from the server
- ◉ Indicates there is a problem on the server
- ◉ The functions you perform on the PC generate service requests for the PC server.
- ◉ The pc_com/pc_server program processes all incoming requests.
- ◉ It checks the license date, user limit, and so on, and passes control to the program specified in the service request.
- ◉ If there is an error, the rhetoric is pulled from the appropriate table in alephe/error_eng using the # shown in the RSE

Remote Service Error (c0861 13) - error wording can be found in the file -
/aleph/error_eng/pc_ill_c0861 - error 0013

User has no ILL unit defined - username not associated with an ILL unit
Notify your system librarian or consortia office



“not” a permissions error
but is corrected
in Staff Privileges/Modify User section

Staff Privileges

Display only users with same user library as connected user

Type a User Name or Select One from the List

LEASTAFF1

User ID

Permitted libraries

LEASTAFF1

LEA40 LEA50 ODN00 ODN01 ODN60

New User

Modify User

Duplicate User

Delete User

Access Rights

User Password Information

User:

LEASTAFF1

Name:

LEA ODIN Office

Password:

Department:

ILL

User Library:

LEA50

Note 1:

Cataloger Level:

99

Note 2:

Function Proxy:

E-mail:

Cataloger Proxy:

Address:

Budget Proxy:

Telephone:

701-777-6346

Order Unit/Sublibraries Proxy:

Expiration Date:

00/00/0000

Cat. OWN ID:

LEA

Last Alert Date:

00/00/0000

Cat. OWN Permission:

LEA

Blocked

Circ. Override Level:

00

Block Reason:

ILL Unit:

ERM User:

ERM Password:

OK

Cancel

Help

Needs an ILL Unit defined!

Staff Privileges

Display only users with same user library as connected user

Type a User Name or Select One from the List

LEASTAFF1

User ID

Permitted libraries

LEASTAFF1

LEA40 LEA50 ODN00 ODN01 ODN60

New User

Modify User

Duplicate User

Delete User

Access Rights

User Password Information

User:

LEASTAFF1

Name:

LEA ODIN Office

Password:

Department:

ILL

User Library:

LEA50

Note 1:

Cataloger Level:

99

Note 2:

Function Proxy:

E-Mail:

Cataloger Proxy:

Address:

Budget Proxy:

Telephone:

701-777-6346

Order Unit/Sublibraries Proxy:

Expiration Date:

00/00/0000

Cat. OWN ID:

LEA

Last Alert Date:

00/00/0000

Cat. OWN Permission:

LEA

Blocked

Circ. Override Level:

00

Block Reason:

ILL Unit:

LEAUT

ERM User:

ERM Password:

OK

Cancel

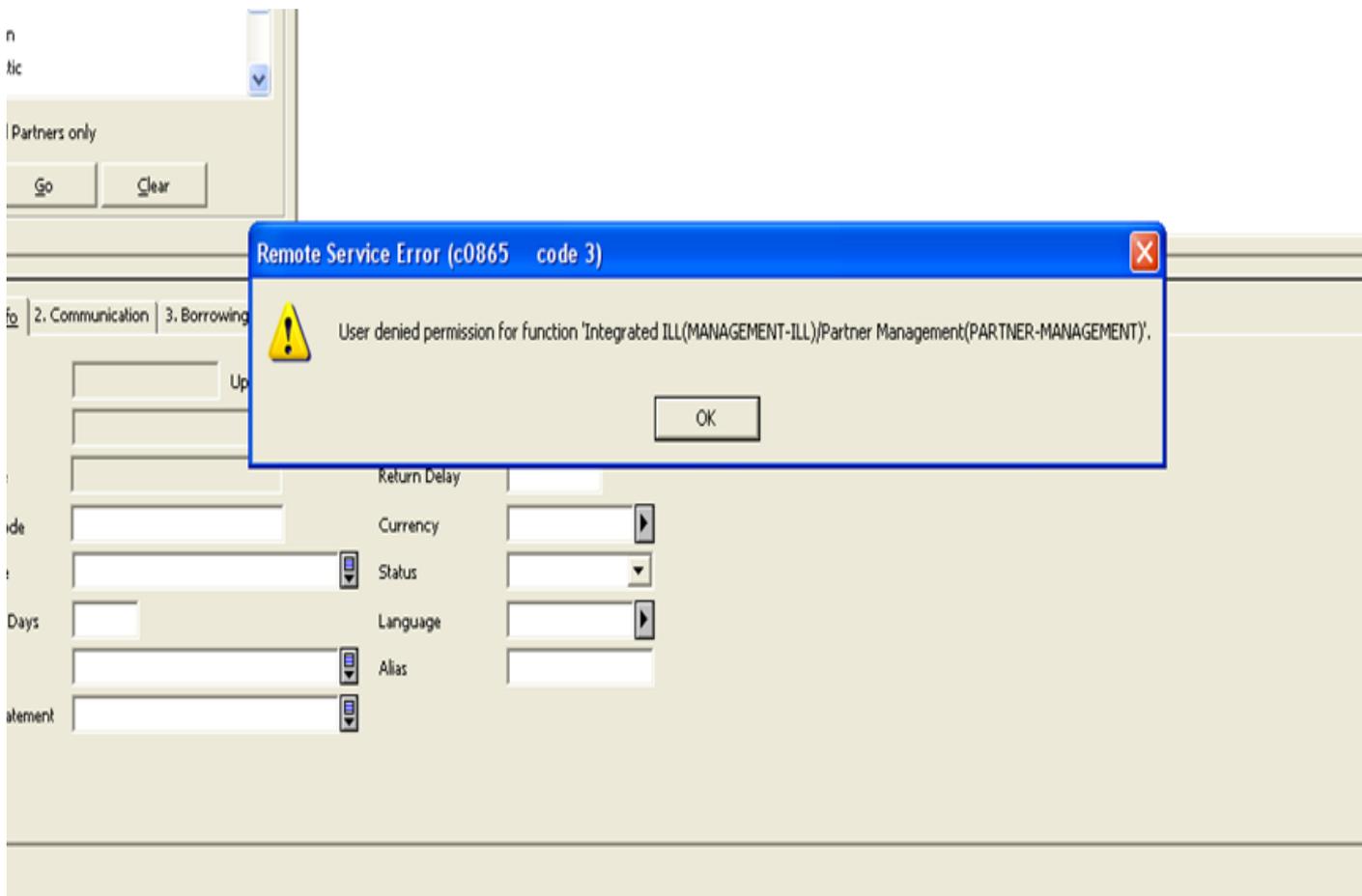
Help

Sort

Now the ILL unit is in place & error will go away!

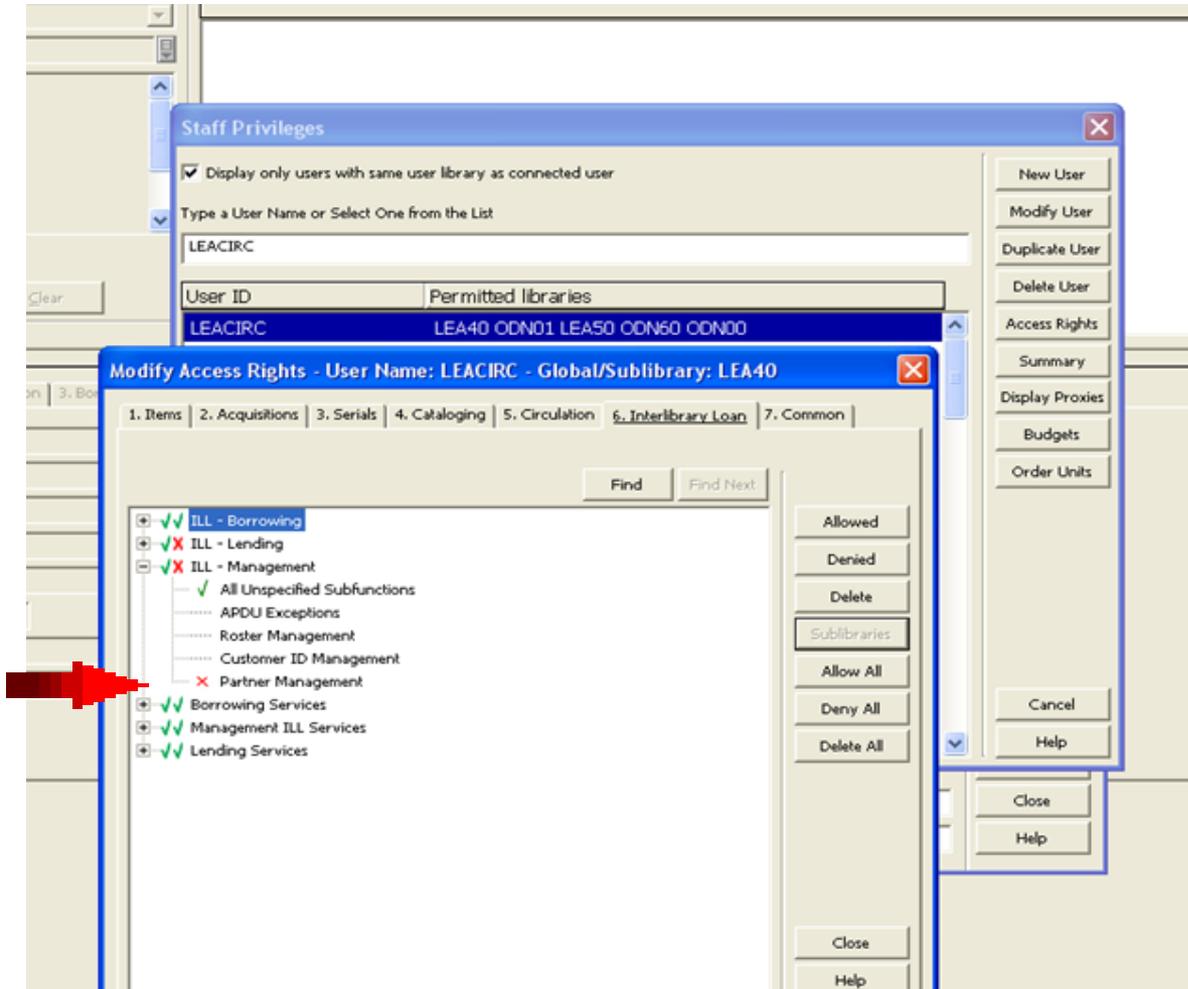
Remote Service Error (c0865 code 3) - indicates it's a permissions thing -

User denied permission for function... - record exact text of the "what" and notify your system librarian or consortia office



'Integrated ILL(MANAGEMENT-ILL)/Partner Management(PARNTER-MANAGEMENT)'

In this case, the function is denied - maybe no change in necessary - e.g. at ODIN/North Dakota, we do not allow the units to change Partner Management info



NOTE: most times an ILL user will not encounter this message as their work is mainly in the Borrowing and Lendings tabs

Aleph keeps track of where you were when you exit the client so if you end your session in lending, when you come back into the client, you will come into lending

These values are kept in the GuiSys file within the Aleph GUI client and adjust as you use client!



Remote Service Error (c0125 replace 3) - it's a permissions thing -

User denied permission for function... - record exact text of the "what" and notify your system librarian or consortia office

The screenshot shows a web application interface with a light beige background. At the top left, there is a "Help" link with a question mark icon. Below it, the text "32001122336)" is displayed in blue. A table-like structure is visible with a "Valid from" label and the date "02/04/06". Below this, there is a blue bar with the text "ffice M" and a dashed line. A red dashed line is also present. An error dialog box is overlaid in the center, titled "Remote Service Error (c0125 replace 3)". The dialog contains a yellow warning icon and the text: "User denied permission for function 'Patrons, Global(PATRON-MANAGE)/Addresses - Update(ADDRESS-PUT)'." Below the text is an "OK" button. At the bottom left of the interface, the text "i@und.nodak.edu" is visible.

'Patrons, Global(PATRON-MANAGE)/Addresses-Update(ADDRESS-PUT)'

If staff can update addresses, highlight the line and then click Allowed

The screenshot displays a library system interface with several overlapping windows. The background window shows 'Office M (ID37307/23132001122336)' and 'Address' information for 'ODIN, Office M' with a 'Valid from' date of '02/04/06'. A 'Staff Privileges' dialog box is open, showing a search for 'LEACIRC' and a list of permitted libraries including 'LEA40 ODN01', 'LEA50 ODN60', and 'ODN00'. A 'Modify Access Rights - User Name: LEACIRC - Global/Sublibrary: LEA50' dialog box is also open, with the 'Circulation' tab selected. In this dialog, the 'Addresses - Update' option is highlighted with a red arrow. Another red arrow points to the 'Allowed' button on the right side of the dialog. The list of access rights includes 'Patrons, Global' (checked), 'All Unspecified Subfunctions', 'Patron Record - Display' (checked), 'Patron Record - Update' (checked), 'Patron Record - Picture - Update/Add' (checked), 'Patron Record - Picture - Delete' (checked), 'Patron Record - Delete' (unchecked), 'Patron Record - prepare for delete (cir-' (checked), 'Addresses - Display' (checked), 'Addresses - Update' (checked and highlighted), 'Addresses - Delete' (checked), 'IDs - Display list' (checked), 'ID - Display' (checked), 'ID - Update' (checked), 'ID - Delete' (checked), 'Patron, Local - Display' (checked), 'Patron, Local - Renew registration' (checked), 'Patron, Local - Update' (checked), 'Patron, Local - Delete' (unchecked), 'PATRON, Global - Display' (checked), and 'Patron Profiles'.

'Patrons, Global(PATRON-MANAGE)/Addresses-Update(ADDRESS-PUT)'

The screenshot displays a library system interface with several overlapping windows. At the top, a table shows user information:

| Address | Valid from | Valid to |
|----------------|------------|----------|
| ODIN, Office M | 02/04/06 | 03/04/06 |

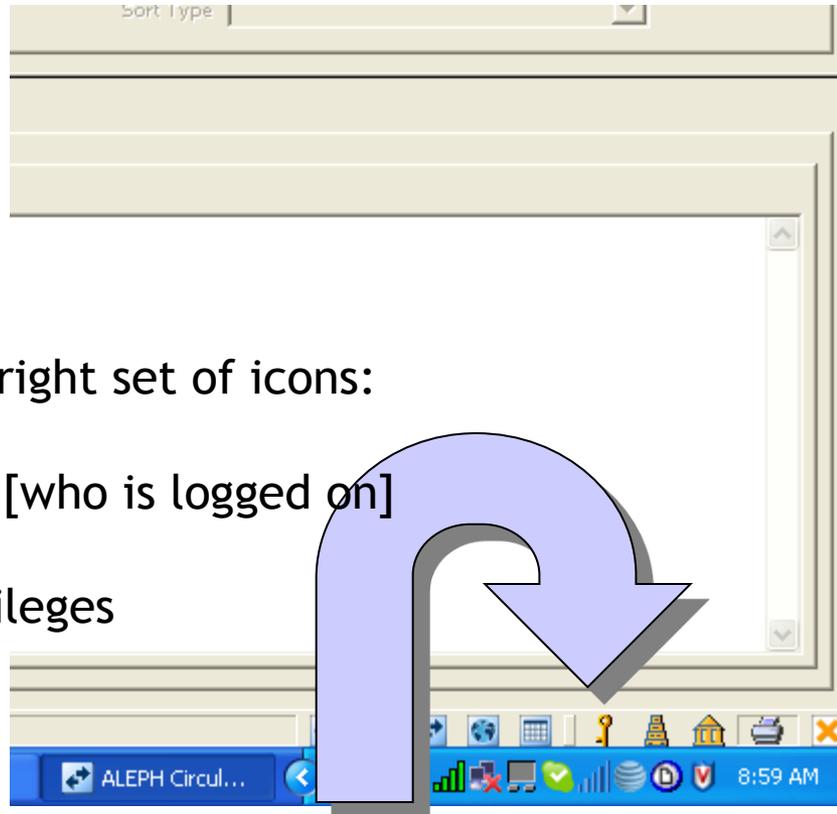
Below this, a blue bar indicates the current user: "ODIN, Office M".

The main window is titled "Staff Privileges". It has a checkbox for "Display only users with same user library as connected user" which is checked. Below this is a search field containing "LEACIRC". A table lists users and their permitted libraries:

| User ID | Permitted libraries |
|---------|-------------------------------|
| LEACIRC | LEA40 ODN01 LEA50 ODN60 ODN00 |

A second window, "Modify Access Rights - User Name: LEACIRC - Global/Sublibrary: LEA50", is open. It has tabs for "1. Items", "2. Acquisitions", "3. Serials", "4. Cataloging", "5. Circulation", "6. Interlibrary Loan", and "7. Common". The "5. Circulation" tab is active. A tree view on the left shows a list of permissions under "Patrons, Global". A red arrow points to the "Addresses - Update" item, which is checked. Other items include "Patron Record - Display", "Patron Record - Update", "Patron Record - Picture - Update/Add", "Patron Record - Picture - Delete", "Patron Record - Delete", "Patron Record - prepare for delete (circulation)", "Addresses - Display", "Addresses - Delete", "IDs - Display list", "ID - Display", "ID - Update", "ID - Delete", "Patron, Local - Display", "Patron, Local - Renew registration", "Patron, Local - Update", "Patron, Local - Delete", and "PATRON, Global - Display". On the right side of this window, there are buttons for "Allowed", "Denied", "Delete", "Sublibraries", "Allow All", "Deny All", "Delete All", "Cancel", and "Help".

So, how do those System Librarians & Consortia Offices Handle permissions?



Click on the Key icon in lower right set of icons:
if you hover,
It'll say: Profile: default-user: [who is logged on]

Right-click & choose Staff Privileges

Type a Username or pick one from list
Or
Duplicate User or create a New User:

Staff Privileges

Display only users with same user library as connected user

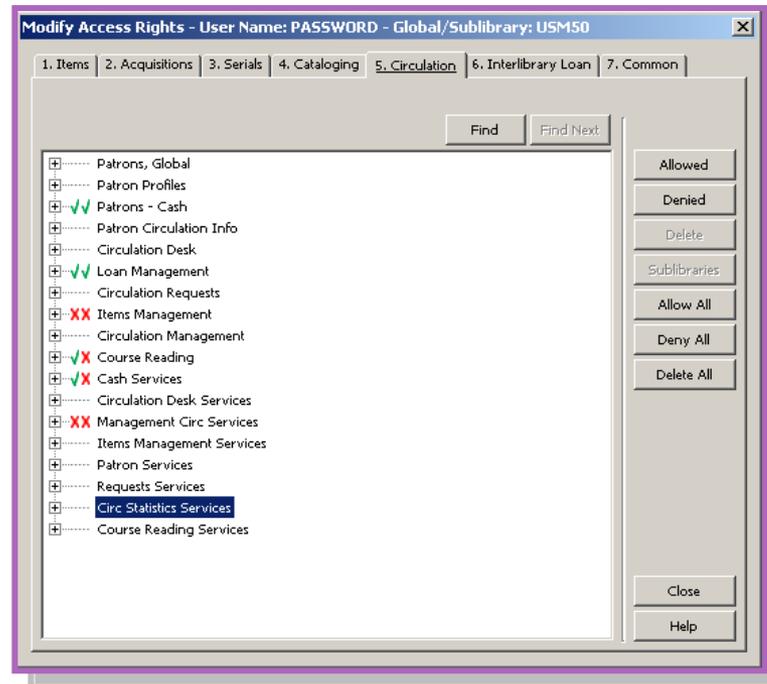
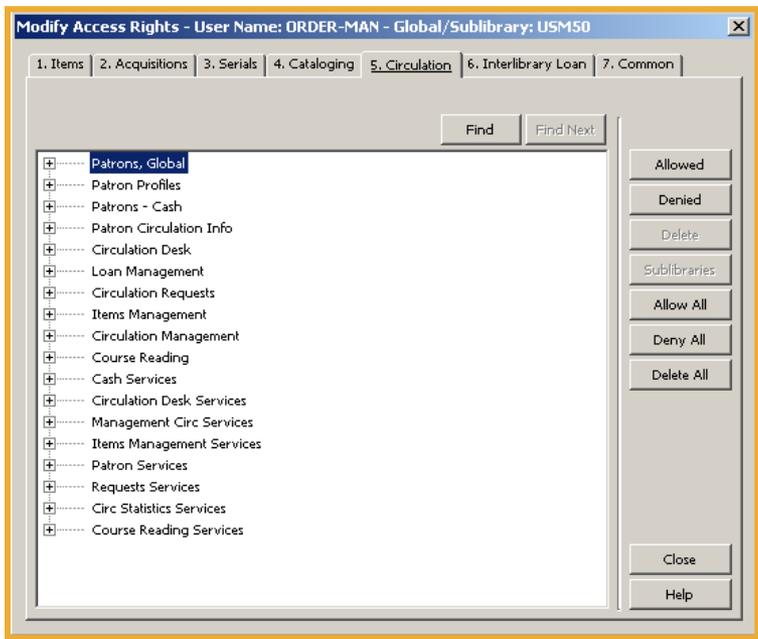
Type a User Name or Select One from the List

LEACIRC

| User ID | Permitted libraries |
|------------|---|
| LEACIRC | LEA40 ODN01 LEA50 ODN60 ODN00 |
| LEACREATE | ODN00 |
| LEASARAHM | FUNCTION PROXY - LEASTACEY |
| LEASTACEY | ODN01 LEA50 ODN60 |
| LEASTAFF1 | LEA40 ODN01 LEA50 ODN00 ODN60 |
| LEASTEPHAN | FUNCTION PROXY - LEASTACEY |
| LESLIEP | FUNCTION PROXY - CIRCSENIOR |
| LHENDERSON | FUNCTION PROXY - UNFCIRCEVE |
| LIBTEST | DH250 FGK50 NAP50 NBJ50 NCR50 NDW50 NWQ50 UND50 UNE50 UNF50 DKT50 GFH50 LRJ50 TB150 VSP50 DZF50 NDV50 NWQ30 WFP50 CPS50 MPS50 NDI50 NGF50 UND30 ZNE50 DIP50 DMB50 HIZ50 HND50 JSH50 MDW50 NDJ50 ODN01 BSF50 LEA50 MTM50 NDS50 NM150 NMY50 VAH50 ZNF50 ZNG50 HPC50 NFG50 ODN60 BQR50 DIZ50 DKP50 FSH50 SA350 UNW50 |
| LIBTEST2 | NM150 |
| LIBAC | FUNCTION PROXY - BRANCHMCP |

New User
Modify User
Duplicate User
Delete User
Access Rights
Summary
Display Proxies
Budgets
Order Units
Cancel
Help

CLICK ACCESS RIGHTS AND THEN CHOOSE “LIBRARY” TO GET THE
TABBED PERMISSIONS SCREEN WHICH ALLOWS YOU TO MODIFY
ACCESS RIGHTS.



EXPAND TREE TO ALLOW ALL/SOME OR DENY/SOME

Modify Access Rights - User Name: PASSWORD - Global/Sublibrary: USM50

1. Items | 2. Acquisitions | 3. Serials | 4. Cataloging | **5. Circulation** | 6. Interlibrary Loan | 7. Common

Find Find Next

- Patrons, Global
- Patron Profiles
- ✓ Patrons - Cash
- Patron Circulation Info
- Circulation Desk
- ✓ Loan Management
- Circulation Requests
- ✗ Items Management
- Circulation Management
- ✓ Course Reading
- ✓ Cash Services
- Circulation Desk Services
- ✗ Management Circ Services
- Items Management Services
- Patron Services
- Requests Services
- Circ Statistics Services**
- Course Reading Services

Allowed
Denied
Delete
Sublibraries
Allow All
Deny All
Delete All

Close
Help

Modify Access Rights - User Name: PASSWORD - Global/Sublibrary: USM50

1. Items | **2. Acquisitions** | 3. Serials | 4. Cataloging | 5. Circulation | 6. Interlibrary Loan | 7. Common

Find Find Next

- Order-index
- Ordering
- ✓✗ Order-Claim
 - All Unspecified Subfunctions
 - Order - Claims - Display list
 - Order - Claim - Display
 - Order - Claim - Update
 - ✗ Order - Claim - Delete**
- Material-Arrival
- Invoicing
- Vendor Maintenance
- Budget Maintenance
- Currency utilities
- Info Services
- Maintenance Services
- Budget Services
- Vendor Services
- Claim Services
- Currency Services
- Invoicing Services
- Ordering Services
- EDI Services

Allowed
Denied
Delete
Sublibraries
Allow All
Deny All
Delete All

Close
Help

Some privileges can be limited to specific sublibraries

The image shows two overlapping dialog boxes from a library management system. The main dialog, titled "Modify Access Rights - User Name: PASSWORD - Global/Sublibrary: USM50", has tabs for "1. Items", "2. Acquisitions", "3. Serials", "4. Cataloging", "5. Circulation", "6. Interlibrary Loan", and "7. Common". It features a tree view on the left with "View Subscription information" selected, and a vertical stack of buttons on the right: "Allowed", "Denied", "Delete", "Sublibraries", "Allow All", "Deny All", and "Delete All". A red arrow points to the "Sublibraries" button. A second dialog, "Modify Permitted Sublibraries", is overlaid on the bottom left. It shows "Library: USM50", "Function: Overview Tree", and "Sub-function: View Subscription information". It contains a table with columns "Available" and "Sublibraries", and a "Permitted Sublibs" list. A red arrow points from the "View Subscription information" item in the main dialog to this sub-dialog.

Modify Access Rights - User Name: PASSWORD - Global/Sublibrary: USM50

1. Items | 2. Acquisitions | 3. Serials | 4. Cataloging | 5. Circulation | 6. Interlibrary Loan | 7. Common

Find | Find Next

- All Functions
- Overview Tree
 - All Unspecified Subfunctions
 - View Item information
 - View Loan information
 - View Order information
 - View Subscription information
 - Mex
 - Item-Show
- Record Triggers

Allowed
Denied
Delete
Sublibraries
Allow All
Deny All
Delete All

Close
Help

Modify Permitted Sublibraries

Library: USM50
Function: Overview Tree
Sub-function: View Subscription information

| Permitted Sublibs | Allowed | Available | Sublibraries |
|-------------------|-------------------------------------|-----------|--------------------|
| | <input type="checkbox"/> | MED | Medicine Library |
| | <input type="checkbox"/> | HYL | East Asian Library |
| | <input checked="" type="checkbox"/> | HIL | Humanities Library |
| | <input type="checkbox"/> | LAM | Main Undergraduate |
| | <input type="checkbox"/> | LAW | Law Library |
| | <input type="checkbox"/> | LIT | Economics Library |

OK
Cancel
Help

SUMMARY Screen -
only shows what
the particular
username has
permissions for →

The screenshot displays the 'Staff Privileges' dialog box. At the top, there is a checked checkbox for 'Display only users with same user library as connected user'. Below this is a search field containing 'PASSWORD'. A table lists users with their permitted libraries:

| User ID | Permitted libraries |
|----------|---------------------|
| PASSWORD | USM01 USM50 USR00 |

An inset window titled 'Summary of Access Rights - User Name: PASSWORD' shows a tree view of permissions:

- Items Control
 - Item - Update
 - USM50 (marked with a red X)
 - Item - Display form
 - USM50 (marked with a red X)
- Services Interface
 - All Unspecified Subfunctions
 - USM01 (marked with a green checkmark)
 - USM50 (marked with a green checkmark)
- Staff Privileges (Passwords)
 - All Unspecified Subfunctions
 - USR00 (marked with a green checkmark)
- Staff Services
 - All Unspecified Subfunctions
 - USR00 (marked with a green checkmark)

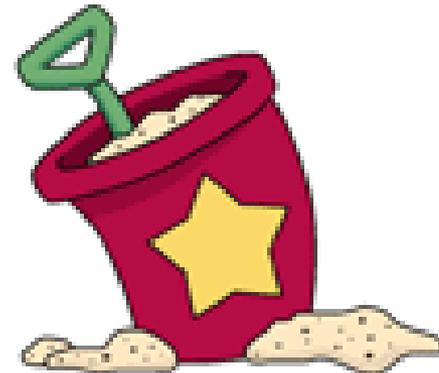
The main dialog box has a vertical toolbar on the right with buttons: New User, Modify User, Duplicate User, Delete User, Access Rights, Summary, Display Proxies, Budgets, Order Units, Cancel, and Help. The bottom of the dialog box has 'Cancel' and 'Help' buttons.

NEW USERNAME

Decide which libraries (xxx50, xxx01, xxx60, xxx40, xxx30, etc) to configure new staff member into!

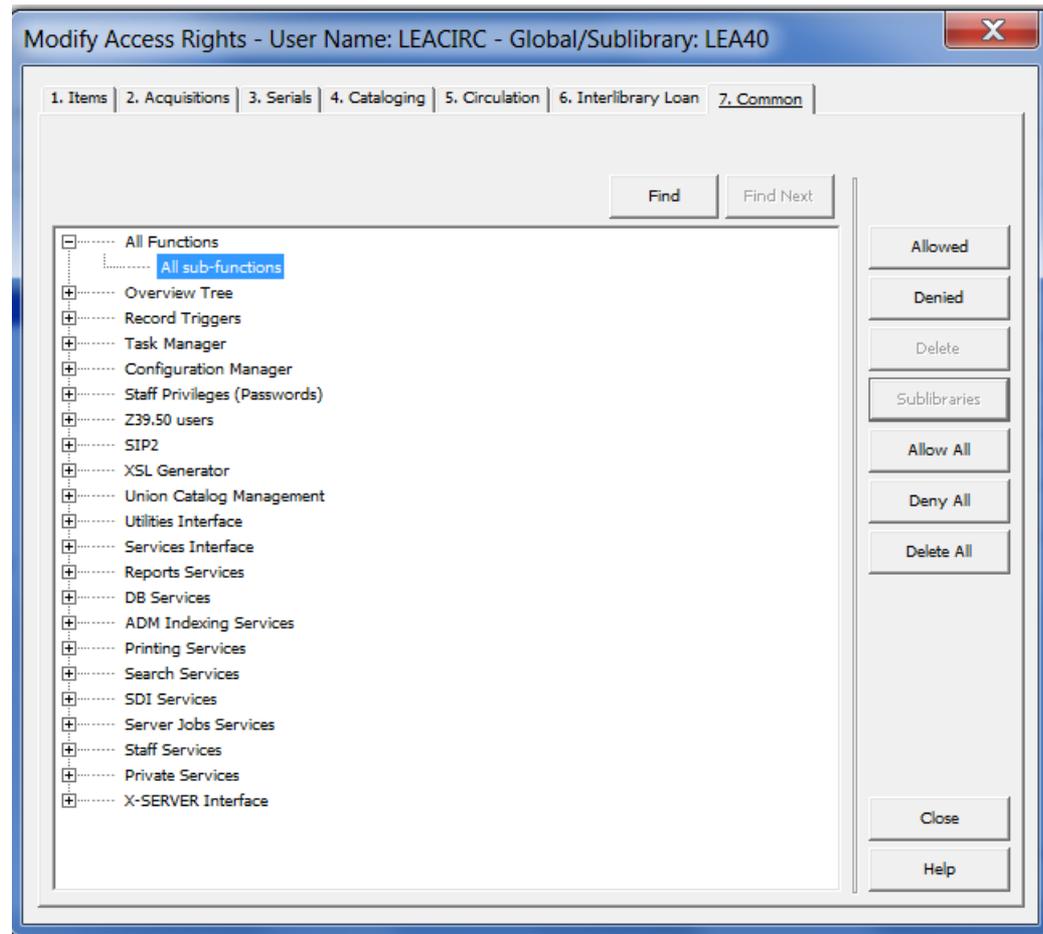
Decide if staff member is “like” someone or a new user type

Perhaps the new staff member is replacing a staff member, if so, it’s a good practice to “duplicate” the old username thereby creating a new username for new staff but retaining old permission profile, then delete old staff username



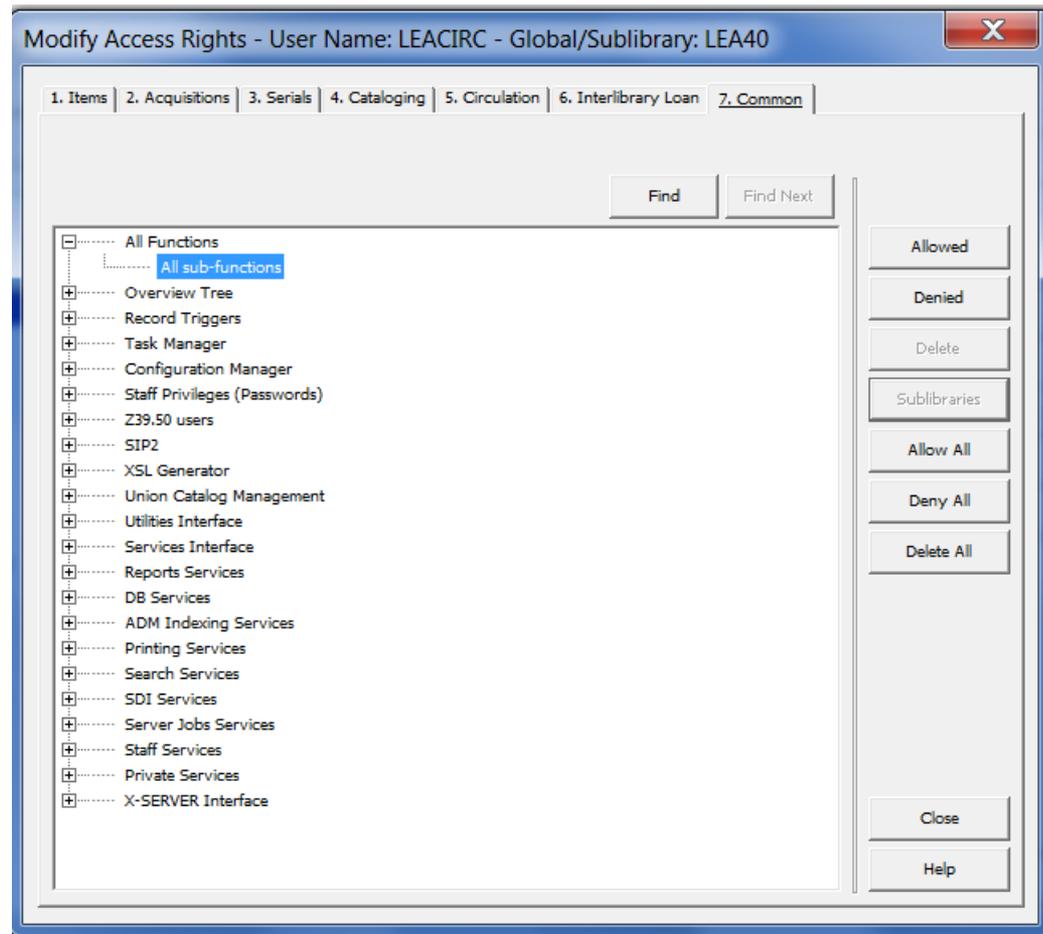
BEST PRACTICES

- If staff has almost “all” permissions, click All Functions, then All sub-functions and click ALLOWED
- Then DENY



BEST PRACTICES

- If staff has “limited” permissions, click All Functions, then All sub-functions and click DENIED
- Then ALLOW



FUNCTION PROXY

- ◉ If you want the selected user to have exactly the same access rights as another user, enter the user name of the other user in the Function Proxy
 - referred to as the "proxy" for your selected user
 - if you assign a proxy to the selected user, you will not be able to define access rights for the selected user. Rather, s/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

- ◉ Note: Budgets need to be set up on “each” username regardless of proxy rights if function proxy is used
- ◉ **Note:** In a Multi-ADM environment a proxy can be assigned only for a staff user belonging to the same ADM library.

CATALOGER PROXY

- Used to define that the user has exactly the same allowed/denied tag permissions and the same OWN definitions as another user.
- If a cataloger proxy is assigned, there is no need to create entries for the user in the permission.dat table (a table used to define cataloging allowed and denied tags for users)
 - ODIN does not use this table
- There is also no need to fill in the OWN definition fields because the proxy's definitions are used.

- **Note:** In a Multi-ADM environment a proxy can be assigned only for a staff user belonging to the same ADM library.

BUDGET PROXY

- Used to specify that the user has exactly the same allowed/denied budget permissions as another user.
 - There is no need to create budget permissions for the user. Instead, the
 - proxy's definitions are used.
-
- **Note:** In a Multi-ADM environment a proxy can be assigned only for a staff user belonging to the same ADM library.

ORDER UNIT/SUBLIBRARIES PROXY

- **Usually** labeled Order Unit Proxy or Sublibraries Proxy, depending on system setup
 - If your Acquisitions system is set to work with order units, this field should be named Order Unit Proxy.
 - If your Acquisitions system is set to work with sublibraries, then this field should be named Sublibraries
- **Unit Proxy.**
 - contains the user name of the order unit proxy
 - used to define that the user has exactly the same order units/sublibraries privileges as another user.
 - There is no need to create order unit/sublibraries permissions for the user. Instead, the proxy's definitions are used.
- **Note:** In a Multi-ADM environment a proxy can be assigned only for a staff user belonging to the same ADM library.

INDIVIDUAL SUBLIBRARY

- ◉ Selecting an individual sublibrary, one may modify access rights for that one sublibrary only.
- ◉ **Sublibrary Sensitivity**
 - Create permissions for creation, deletion or update on the sublibrary level (and not only on the ADM level) for the following:
 - ◉ In both Cataloging and Circulation, records that have sublibrary identification - Local Patron Records, items and all item-related actions
 - ◉ In Circulation, some of the actions on a patrons list of loans (sublibrary is checked for Delete, Declare lost, Claim returned, and Renew but not for Change date)
 - ◉ In Circulation and Acquisitions, some of the batch services receive sub-library as a parameter. This is in order to display only permitted sub-libraries in the list in the service's form dialog box.
- ◉ **Note:** The **Sublibrary** button is accessible only if the highlighted permission is sublibrary sensitive.

REMINDERS

- tab100 provides options for username
- **Note:** Denying the **All Unspecified Subfunctions** action forces a denial on all of the group's actions, even if they have been explicitly allowed
- **All Functions** refers to every function EXCEPT User Passwords and User Profiles
- In ALEPH, the loan and return of items from a specific sublibrary is not controlled via the staff user names and passwords but rather via the IP identification of the PC. This is done in the \$xxx50/tab/tab_attr_sub_library table

REMINDERS

- In the Budget column, an asterisk (*) can be displayed to represent a group of budgets
 - For example:
 - If *-2002 is displayed in the budget column, this refers to all budgets that end with -2002.
 - If HISTORY-*, is displayed in the budget column, this refers to all budgets that start with HISTORY.
 - If * is displayed in the budget column, this refers to all budgets.
- **Staff Privileges Report (staff-01)** - This service produces a report of staff users and their privileges according to various filters that may be placed on both which staff users will be retrieved and on what staff privileges will be reported.
- • **Staff Users Report (staff-02)** - This service produces a report of staff users according to various filters. The filters may be placed on staff user information or on the privileges that the user has.

- *Can set an expiration date for user account
- *To immediately block a user's account, click the "Blocked" field
- * You can also add a Block Reason

User Password Information

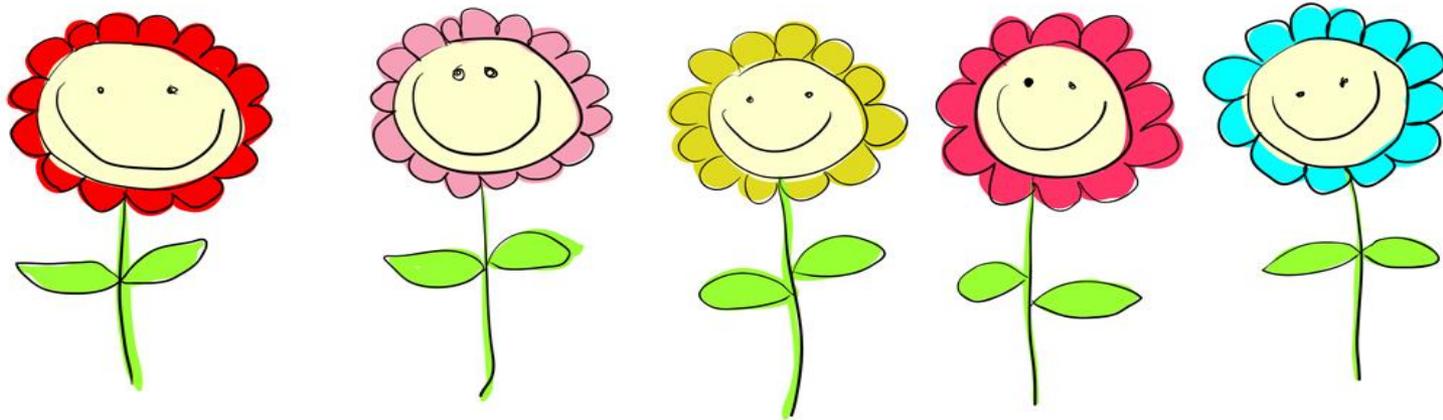
| | | | | |
|-------------------------|--------|----------------------------------|------------|----|
| User: | BINDER | Name: | Binder | OK |
| Password: | | Department: | | |
| User Library: | USM50 | Note 1: | | |
| Cataloger Level: | 00 | Note 2: | | |
| Function Proxy: | | E-Mail: | | |
| Cataloger Proxy: | | Address: | | |
| Budget Proxy: | | Telephone: | | |
| Order Unit/Sublibraries | | Expiration Date: | 00/00/0000 | |
| Cat. OWN ID: | | Last Alert Date: | 00/00/0000 | |
| Cat. OWN Permission: | | <input type="checkbox"/> Blocked | | |
| Circ. Override Level: | 00 | Block Reason: | | |
| ILL Unit: | | ERM User: | | |
| | | ERM Password: | | |

Cancel
Help

/TAB/TAB100 - CHOICES

- ◉ *tab100 / **PASSWORD-NO-USE-PERIOD=nnn** - block staff if password has not been used in nnn of days
- ◉ *tab100 / **PW-EXPIRY-WARNING=nn** - defines # of days (before password expiration) that you will get a notification
- ◉ *tab100 / **PASSWORD-CHANGE-PERIOD=nnn** - defines # of days before password must be changed (note: 15 days before you have to change you will receive notification)
- ◉ *tab100 / **MINIMUM-PASSWORD-LENGTH=nn** - set a minimum password length (max is 10 characters)
- ◉ *tab100 / **ALPHA-NUMERIC-PASSWORD=Y/N** - combination of alpha & numeric characters required or not
- ◉ *tab100 / **FIRST-LOGIN-PASS-CHANGE =Y/N** - change password on first log in or not
- ◉ *tab100 / **PASSWORD-FAIL-BLOCK =Y/N** - block user after 3 failed login attempts or not

Thank you for your attention!



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