Limiting Access to User Information

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Limiting access to user information

• It is possible to limit operators with certain user roles from accessing other users' information by blocking the operators' ability to search for patron information.

• When this function is enabled, the standard user search field is replaced by a text entry field.

• This means that the ID can still be entered or scanned in, but the auto complete function on the following functions are hidden:
  • Name search
  • Find and Manage Users pickup list
  • Recent searches button
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• Operators with the following roles can be restricted:
  • Circulation Desk roles - Manager, Operator, and Operator - Limited
  • Fulfillment Services roles - Manager and Operator
  • Requests Operator

• By default, this function is disabled. To enable it, contact Ex Libris Support.
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- Currently user Donald Draper has role “Circulation Desk Operator” for the “Main Library” for the “Main Desk” in institution ‘YILIS Institute of Library and Information Science’
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- From the repository search Donald can search for user “Alicia Chen” by the “primary identifier”
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- From the repository search Donald can search for user “Alicia Chen” by the name
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• From the manage patron services Donald can search for user “Alicia Chen” by the “primary identifier”
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• From the manage patron services Donald can search for user “Alicia Chen” by the name
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• From the manage patron services pickup list Donald can search for user “Alicia Chen” by the “primary identifier”
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- From the manage patron services pickup list Donald can search for user “Alicia Chen” by the name.
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• As a result of an institution requesting from Ex Libris support to limit this functionality one or more of these roles may be changed:
  • Circulation Desk roles - Manager, Operator, and Operator - Limited
  • Fulfillment Services roles - Manager and Operator
  • Requests Operator
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- Here we have changed the role “Circulation Desk Operator” (the role which Donald Draper has) and removed the check next to “Allow Users Search”
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• Now in the manage patron services there is no longer a link to the pickup list

• Previously Donald Draper had this

This pickup list link to search for the users has disappeared.
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- Now in the manage patron services the name cannot be used to retrieve the patron
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• And now in the manage patron services the name cannot be used to cause the AJAX to bring suggestions
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- And now in the manage patron services only the ID can be used to retrieve the patron

![Patron Identification](image)

![Patron Services](image)

- Chen, Alicia
  - Active balance: 0.00 GBP
  - ID: AliciaC613
  - User group: Alumni

- Scan item barcode: Look-up or select

- Loan Display: Loans of this session
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• But ... Donald can still search for Users from the repository search

<table>
<thead>
<tr>
<th>Name</th>
<th>Account Type</th>
<th>Record Type</th>
<th>Job Category</th>
<th>User Group</th>
<th>Status</th>
<th>Expiration date</th>
</tr>
</thead>
<tbody>
<tr>
<td>Chen, Alicia</td>
<td>Internal</td>
<td>Public</td>
<td>-</td>
<td>Alumni</td>
<td>Active</td>
<td>01/08/2037</td>
</tr>
</tbody>
</table>
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• If we want to remove the repository search of patrons then we also need to have the “User List View” removed from the “Circulation Desk Operator”
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- Now Donald Draper has no option to search the repository for users.

No option here to search by user