

Access Levels Reference Guide

This guide explains the **Access Levels** option under the **Back Office** tab. Access Levels regulate the functions that users can perform in Destiny's Library Manager. They also determine what the user can see—which tabs at the top, the options on those tabs, the icons on the pages, and even the information available on the pages.

Basic Concepts

Each access level consists of a set of permissions that the Destiny Administrator or the Site Administrator can edit. The Destiny Administrator or Site Administrator then connects the access level to the appropriate patron, assigning a user name and password as needed. At the site level, the Site Administrator is the only person who has the permission to manage access levels.

At installation, Destiny has six default Access Levels:

- Administrator
- Guest
- Library Administrator
- Patron
- Staff
- Teacher

The Destiny Administrator and Site Administrator can change the permissions in these and create additional Access Levels. They can delete any of the defined Access Levels except that of the Administrators and the Guest.

To view a list of Access Levels, choose the **Back Office** tab and the **Access Levels** option. The Access Levels appear in a list.

Basic Concepts



To add an Access Level to the list, click on the **Access Level** button (icon at left) at the bottom of the screen. To edit an existing Access Level, click on the **Edit** icon to the right of the level.

This screen capture shows the six default access levels in Library Manager. The access level of the **Patron** is

Administrator		
Guest		
Library Administrator		
Patron	Default Access Level	
Staff		
Teacher		
Textbook Administrator		

generally used for students. The Site Administrator can change the default by selecting the **Edit** icon next to the desired default access level. The Site Administrator can also delete the **Patron**, **Staff**, or **Teacher** access levels as desired.

The tables in this document examine the permissions available to the Site Administrator, which means, for most sites, *all* permissions. However, the Destiny Administrator may choose *not* to grant certain permissions to the Site Administrator. Some permissions are intentionally not granted by the Destiny Administrator.

When this occurs, the Site Administrator sees a black line through the disabled permission under the Administrator

level and is unable to grant the disabled permissions to another user.



There are three tabs that govern access levels in Library Manager:



In the next section of this document, there is information about permissions under the **Library Materials** tab.

Library Materials Tab

Library Materials Tab

The table that follows explains how to assign or enable Access Levels under the **Library Materials** tab from the viewpoint of the Site Administrator (Administrator access level).

The groups of permissions (with page numbers) are:

- Library Home Page (page 6)
- Library Catalog Search Access (page 7)
- Library Catalog Management (page 12)
- Library Circulation Access (page 20)
- Fine Management (page 23)
- Hold Management (page 24)
- Administrative Access (page 24)

The symbol ‡ denotes a subscription service.

Permissions appearing in gray must be enabled before the permissions in black that follow.

Library Home Page	Details
<input checked="" type="checkbox"/> View home page	Under the Library Materials tab, Library Home Page option, this permission enables the user to view the site's home page.
<input checked="" type="checkbox"/> Edit home page	The Edit Page button on the Home page opens Edit home page , allowing the user to edit the text, and add/edit/delete groups and links on the Home page . This permission also includes the ability to view the home page. If the user has the permission to Edit the home page, they have permission to View the home page.

Library Catalog Search Access	Details
<i>Use Library Search</i>	The user can select the Setup button to configure the order of the search tabs. The tabs are Basic, Power, Visual, Categories, Number, Barcode, and Brief Records. The search permissions must be enabled before the search setup can be configured.
<input checked="" type="checkbox"/> Basic search	<p>This permission, Basic Search, allows the user to search on Keyword, Title, Author, Subject, Series, and One Search (with subscription). The Site Administrator has the ability to set up basic search options for each access level. Selecting the Setup button next to the Basic search permission displays the Basic Search Setup page, where a user can change the order of icons or choose not to display buttons on the Library Search page.</p> <p>Because this permission is access level-specific, the administrator should set up the options for each access level.</p>
<input checked="" type="checkbox"/> Basic search <input checked="" type="checkbox"/> Browse results (by default)	<p>Under the Library Catalog Search Access section, the Browse results (by default) search option causes the following to appear:</p> <ul style="list-style-type: none"> ■ The Browse tab appears first by default with the Searchable Words subtab as another searchable option. ■ For Keyword searches, the Browse tab displays Subjects <p>Disabling Browse results (by default) allows the user to see the title list first, which is what most librarians and users prefer.</p>
<input checked="" type="checkbox"/> Power search	<p>This permission allows the user to use Power searching in the Catalog with the Boolean operators AND-OR-NOT to define the relationship between the words or phrases in a search.</p> <p>Selecting the Power tab offers a user the ability to set up to three search criteria, with options that including Keyword, Title, Author, Subject, Series and Note. A user also has the additional option to search using All these words, Any of these words, Starting with these words, and This phrase.</p>

Library Materials Tab

Library Catalog Search Access	Details
<input checked="" type="checkbox"/> Visual Search	Instead of a search box and search buttons, Visual Search displays groups of pictorial action icons that perform pre-configured searches. There are over forty default icons that are pre-configured. If these icons do not meet a user's needs, they can be reconfigured, deleted, or a user can add new ones. The permission to set up Visual Searches appears under the Administrative Access grouping of permissions covered later in this document.
<input checked="" type="checkbox"/> Copy Categories Search	This permission allows the user to search using the Copy Categories tab. Categories are similar to a book list and consist of a Copy Category Description list with links to lists of the titles and copies. A permission that adds functionality to Search using Copy Categories is Add/edit/delete/assign Copy Categories under the Library Catalog Management group of permissions.
<input checked="" type="checkbox"/> ‡Search One Search as: - Student - Staff	If the One Search subscription applies, enabling this permission allows the user to take advantage of searching multiple databases at one time. Some One Search administrators select and limit the databases that students may search. Enable the radio button next to Student or Staff to choose the set of databases that Destiny searches. The Basic search and Power search permissions must be enabled to view this option.
<input checked="" type="checkbox"/> Standard/control number searches	Enabling this permission gives the user the ability to search by Control Number , Library of Congress Catalog Number , International Standard Book Number , and International Standard Serial Number . The tab for Number search appears on the Library Search page. A user can scan the ISBN and ISSN but cannot use wildcards in this field.
<input checked="" type="checkbox"/> Call number search	Enabling this permission gives the user the ability to search by Call Number . If a user has both Use standard/control number searches and Use call number search permissions, the Number tab offers a combined list containing Call Number, LCCN, ISBN, ISSN and Control Number.
<input checked="" type="checkbox"/> Barcode search	This permission enables the user to search by barcode by scanning or manually entering the barcode of the copy. A user must enter the complete barcode number; wildcard characters (* and ?) are not valid.

Library Catalog Search Access	Details
<input checked="" type="checkbox"/> Brief records search	Enabling this permission gives a user the ability to search for Brief Records . Destiny considers a title record that does not contain tags 305 to 899 (inclusive) to be a brief record. The Brief Records search enables a user to find titles that have incomplete MARC records. Destiny assumes that any 3-digit number entered in the From and to Call Number fields is a Dewey number, and anything else, a call number prefix. This is generally enabled for Library staff who can update titles.
<input checked="" type="checkbox"/> Search using Destiny Quest	This permission allows the use of Destiny Quest as a search alternative to standard search methods such as Basic, Power, etc. This permission must be set in order to use Destiny Quest as the default search, or to toggle between the standard search methods and Destiny Quest.
<input checked="" type="checkbox"/> Search using Destiny Quest <input checked="" type="checkbox"/> Search all library sites through Quest	With the Search using Destiny Quest permission set, this permission is used to expand a Destiny Quest search to include all libraries in the district. Titles in the local collection will be given highest priority, but others will display as well.
<input checked="" type="checkbox"/> Search using Destiny Quest <input checked="" type="checkbox"/> Use Quest by default	This permission sets Destiny Quest as the default search tool. Users who have this permission set will be immediately placed in the Destiny Quest search tool. The Search using Destiny Quest permission must be set prior to selecting this one.
<input checked="" type="checkbox"/> ‡Search Standards	If this subscription service applies, this permission enables a user to Search or Browse for Standards for a state or province under the Catalog tab. The Standards page provides a single, time-saving method for finding the desired information.
<input checked="" type="checkbox"/> ‡Search WebPath Express	If this subscription service applies, this permission allows the user to access WebPath Express under the Catalog tab. When searching for web sites and library materials about a certain subject, the WebPath Express page helps find the needed information. A user can find the subject in any one of three ways: searching, browsing, or clicking through the Visual Search pictures. Using any of these methods, a user can view, print, or add the lists of web sites and library materials to My Personal Lists or another Resource List .

Library Materials Tab

Library Catalog Search Access	Details
<input checked="" type="checkbox"/> Access My Lists for library	<p>The Resource Lists option under the Catalog tab gives a user the ability to create and maintain multiple lists of items grouped together for various purposes. Access level permissions control the ability to create multiple lists. Depending upon the number and kind of permissions granted, a user may have the ability to create private and public lists and see all other users' public lists. A user can choose to make a list viewable by all local users of the product who have a user name and password. Other lists remain private.</p>
<input checked="" type="checkbox"/> Access My Lists for library <input checked="" type="checkbox"/> Scan library items into My List	<p>This permission enables the user to scan specific library materials into a predefined list that the user establishes. In order to Scan library items into My List, a user must have Access My Lists for library permission.</p>
<input checked="" type="checkbox"/> Search all library sites <p>Note: In order to conduct a search of all library sites, a user must have at least one permission to search the Library Catalog. A user can gain access under any of the Search permissions discussed above.</p>	<p>A user can search locally or other library sites by selecting the drop-down list next to Look in on the Library Search page. This permission allows the user to search the library sites in the district. This can be limited by an entire district and site type.</p>
<input checked="" type="checkbox"/> Always show all library materials in the district	<p>With this permission enabled, a search will produce results locally and from all sites in the district <i>if</i> the user's site contains the item.</p>
<input checked="" type="checkbox"/> Show all title details (by default)	<p>This permission enables the user to see all title details (by default) during a library catalog search. The user must have at least one of the Library Search permissions selected to use this permission. Note the circled area in the screen capture on the next page. If this permission is disabled, the user will need to use an extra step (clicking the Show More link circled below) to see more title details.</p>

Library Catalog Search Access	Details
<div style="border: 1px solid black; padding: 10px;"> <div style="display: flex; justify-content: space-between; align-items: center;"> Show More Publication Info </div> <hr/> <p>Publication Info</p> <p>Published New York : Children's Press, c1998.</p> <p>Format 47 p. : ill. (some col.), col. map ; 22 cm.</p> <p>LCCN 97-8232 /ac</p> <p>ISBN 0-516-20623-0</p> <p style="text-align: right;">Top</p> </div>	
<input checked="" type="checkbox"/> View titles in MARC format	Enable this permission for patrons needing to view the complete MARC record for a title. Note the MARC View tab appears when this permission is enabled.
<input checked="" type="checkbox"/> See hidden materials	This permission enables the user to view search results with a Circulation Type that is designated as hidden in Site Configuration . Copies do not appear on search results lists of those patrons without See hidden materials enabled in their access levels. The materials are also hidden from patrons of other libraries.
<input checked="" type="checkbox"/> Submit library review ratings	This permission enables the user to rate library materials using a rating scale of 1 to 5 stars.
<input checked="" type="checkbox"/> Submit library review ratings <input checked="" type="checkbox"/> Submit library review comments	This permission enables the user to enter comments when submitting a library review. Reviews that contain comments must first be approved by a user with Approve/delete library reviews permission before they will be posted.
<input checked="" type="checkbox"/> Submit library review ratings <input checked="" type="checkbox"/> Upload digital content to review	This permission allows the user to add digital content when posting a review. The content may be an audio or video file. Like review that contain comments, these must also be approved before they will be posted.

Library Materials Tab

Library Catalog Management	Details
<p><i>Manage Titles</i></p> <p><input checked="" type="checkbox"/> Add title from search results</p>	<p>This permission enables a user to only add a title from search results including district titles, Alliance Plus, or Z-Sources.</p>
<p><input checked="" type="checkbox"/> Add title from search results</p> <p><input checked="" type="checkbox"/> Add new title after searching</p>	<p>This permission allows original cataloging of a title after a search has been performed allowing the Add the Title hyperlink to appear. The user can add a title using a simple MARC editor.</p>
<p><input checked="" type="checkbox"/> Add title from search results</p> <p><input checked="" type="checkbox"/> Add new title after searching</p> <p><input checked="" type="checkbox"/> Add new title without searching</p>	<p>This permission allows the user to perform original cataloging without first searching for the record in the database. The user can add a title using a simple MARC editor.</p>
<p><input checked="" type="checkbox"/> Duplicate</p>	<p>This permission enables the user to duplicate titles that already exist in their district Catalog. This permission also includes the ability to view a title in MARC format. If the collection contains a record similar to another record, the user can duplicate the record so it can be modified for ease of editing.</p>
<p><input checked="" type="checkbox"/> Edit</p>	<p>This permission allows the user to Edit MARC records in the Catalog. On the Search Results page, locate the title and click its Details option. The Edit Title button on the Title Details page opens the Edit Title page, where this access level gives a user the ability to Edit the title. This permission includes the Access Catalog View titles in MARC format. This permission also includes the ability to view a title in MARC format.</p>

Library Catalog Management	Details
<p><i>Manage Titles</i></p> <p><input checked="" type="checkbox"/> Delete</p>	<p>This permission allows the user to delete the MARC record and its associated copies. This permission includes the ability to delete copies even if the user does not have the Manage Copies – delete permission.</p> <p>When a user chooses to delete a title, if another site in the district is also using the title record, the user will receive a confirmation message. Clicking Yes on the message causes Destiny to disassociate the title from the collection and deletes all local copies. The title record remains in the district catalog. If no other site in the district is using the title record, Destiny gives the choice whether to remove the title from the local collection or to delete the title from the district catalog.</p>
<p><i>Manage Copies</i></p> <p><input checked="" type="checkbox"/> Add/Duplicate</p>	<p>This permission enables the user to Add or duplicate copies in the Catalog. The Add Copies page allows a user to enter copy-specific information for the materials in the collection. The information can be as brief or complete as needed. The only required fields are Barcode and Call Number. Use the remainder of the fields as needed. After entering the appropriate copy information, click Save Copies.</p> <p>The Duplicate button is next to an existing copy on the Copies tab. After selecting Duplicate, a user will see the add copy form with the same information completed except the barcode number will not be entered.</p>
<p><input checked="" type="checkbox"/> Edit</p>	<p>This permission enables the user to Edit copies under the Catalog tab in these locations: Edit Copy on a Copy Status page in the circulation, Edit button next to an existing copy on the Copies tab of a Title Details page, Global Update and Individual Update tabs in update copies in the catalog. This permission includes the Access Catalog View titles in MARC format permission. After a user clicks on the Edit button, this permission enables the ability to change the details of the copy.</p>

Library Materials Tab

Library Catalog Management	Details
<p><i>Manage Copies</i></p> <p><input checked="" type="checkbox"/> Delete</p>	<p>This permission enables the user to Delete copies in the Catalog. Individual Delete lets a user remove copies from the collection by entering their barcode numbers one by one. Use this feature when weeding materials from the collection. A user can either delete copies Individually or by Batch Delete in Update Copies under the Catalog tab.</p>
<p><input checked="" type="checkbox"/> Add to purchasing wish list</p>	<p>This permission lets the user add a title to the purchasing Wish List which appears under the Processing Needed flag. Users can request the purchase of titles/copies not in the current collection.</p>
<p><input checked="" type="checkbox"/> View/delete wish list entries</p>	<p>This permission allows the user to view the purchasing Wish List and remove any titles that appear in the list.</p>
<p><input checked="" type="checkbox"/> Add/Edit/Delete digital resources</p>	<p>This permits the user to add digital content such as audio or video files to a MARC record. The link to the file is stored in the 856 tag.</p>
<p><input checked="" type="checkbox"/> Add/edit/delete site-specific subjects</p>	<p>This permission enables the user to Add/edit/delete site specific subjects to any title records in the Catalog, but, these are subjects that appear <i>only</i> locally in Destiny. At other sites in the district, site-specific subjects are ignored in searches and do not appear in any search results, Title Details pages, or reports. Enabling this permission causes the Site Subjects button to appear on the Title Details page.</p> <p>When a user saves a site-specific subject, the following information is displayed in the MARC record, 69X tag:</p> <p>_a Local Subject Heading</p> <p>_5 Destiny(<Site ID>)</p> <p>Without this permission, catalogers can still create site-specific subject tags on the MARC view tab.</p>

Library Catalog Management	Details
<input checked="" type="checkbox"/> Add/edit/delete/assign copy categories	<p>This permission enables a user to group copies for many different purposes. These include supporting curricula, tracking vendors and funding sources, producing bibliographies and reading lists, and promoting special collections or new materials. A user can also use a category as a temporary holding area for Resource List contents. Installation provides an empty, numbered list. This permission enables a user to edit the list, add to the list, and assign copies to a category.</p>
<input checked="" type="checkbox"/> Approve/delete library reviews	<p>This permission allows the users to approve reviews submitted by their patrons. When a review requires approval, a user with this permission will see the Processing Needed flag in the Reviews Needing Approval page.</p>
<input checked="" type="checkbox"/> Approve/delete library reviews <input checked="" type="checkbox"/> Edit library review contents	<p>Users that have Approve/delete library reviews permissions will also have the ability to edit comments or digital content during the approval process.</p>
<input checked="" type="checkbox"/> Merge copies from duplicated library titles	<p>Merge copies enables the user to combine copies from duplicated library titles. After importing vendor records and adding title records, a user may find that the database contains several title records for the same item. The user must have the Access My Lists for library permission enabled to use this feature.</p> <p>The merge process affects the database in three ways:</p> <ul style="list-style-type: none"> ■ After merging the copies into one title record, the process permanently deletes the other title records. ■ Any local tags on the “other record” are added to the “best title.” ■ The copy records retain any holds, reserves, or fines that they had before the merge. <p>In the centralized Destiny database, titles are shared with all sites. Once a title is merged it affects all sites. This does not apply to single site Destiny installations.</p>

Library Materials Tab

Library Catalog Management	Details
<input checked="" type="checkbox"/> Update Z39.50 sources	This permission enables access to the Update Z-Sources tab under the Add Titles option. A user must set up each Z-Source (library) for Library Manager to search and retrieve MARC records from libraries around the world that have Z39.50 servers.
<input checked="" type="checkbox"/> Import titles and copies	This permission enables the user to import titles and copy records in the MARC21/852 holdings format. A user will need to select the manner in which Destiny handles duplicate records for both MARC records and copies, determine which library the copies belong to (if the user is a district materials manager), and add information to the incoming copy records, if desired. The user can also preview the import or add the imported records to a Resource List . A user with this permission will have access to the Job Manger for viewing the job summaries only.
<input checked="" type="checkbox"/> Import titles and copies <input checked="" type="checkbox"/> Import titles by control number	This permission allows the user to import a file that has updated title and copy records into the database. The titles must be exported from <i>this</i> installation of Destiny and must have the same Destiny-generated control number.
<input checked="" type="checkbox"/> Export titles/copies	This permission enables the user to Export Titles in the Catalog .
<input checked="" type="checkbox"/> Import authority <input checked="" type="checkbox"/> Manage authority	<p>These two permissions enable the user to import or change authority records.</p> <p>Authority records:</p> <ul style="list-style-type: none"> ■ Provide consistency for terms that serve as access points to the MARC records. ■ Generate cross-references. Cross-references (see and see also) lead patrons from unauthorized to authorized headings while searching the catalog. <p>In the centralized Destiny database, records are shared with all sites so importing authority records affects all sites. This does not apply to single site Destiny installations.</p>

Library Catalog Management	Details
<input checked="" type="checkbox"/> Manage subjects	<p>This permission enables the user to choose the sources of subject headings for central MARC records. The user can choose to discard headings from one or more of the sources, or moving forward, not import specific subject headings.</p> <p>In the centralized Destiny database, records are shared with all sites so managing subjects in the title record affects all sites. This does not apply to single site Destiny installations.</p>
<input checked="" type="checkbox"/> Edit MARC templates	<p>This permission gives the user the ability to change the MARC record template used to catalog title records. A user can add, edit and delete tags.</p> <p>In the centralized Destiny database, MARC templates are shared with all sites. This does not apply to single site Destiny installations.</p>
<input checked="" type="checkbox"/> Receive library copies	<p>This permission allows users to receive books cataloged at the district level and transferred to the destination school. The receiving site can accept copies that have already been barcoded or barcodes can be assigned upon receipt. Enabling the check box displays the Receive tab under the Update Copies option (Catalog tab).</p>
<input checked="" type="checkbox"/> View library copy notes	<p>This permission enables to user to see any copy-specific notes added to the copy record. To view copy notes, the user must also have either View library item status or Check out library materials permission under the Library Circulation Access. For example, if a copy has sustained water damage and the record has a note about the damage, the user will be able to view the note. When a note exists for a copy and this permission is enabled, the note icon appears next to the barcode in Check Out, Check In and Renew under the Circulation tab. A user can read the text of the note by clicking the barcode number or switching to the Copy Status page if the permission is enabled.</p> <p>The Notes section shows any notes that have been added to the copy record. A regular note appears only on the Copy Status page. For a note, a user can enter up to 1000 characters.</p>


Library Materials Tab

Library Catalog Management	Details
<input checked="" type="checkbox"/> View library copy notes <input checked="" type="checkbox"/> Add/edit/hide/delete library copy notes	<p>The ability to manage library copy notes (add/edit/hide/delete) is dependent upon the permission to view the notes. It is also dependent upon Add/Duplicate or Edit copies.</p>
<input checked="" type="checkbox"/> ‡Enhance records with AR/ RC information	<p>If a site has subscribed to one of the Reading Program Services, this permission allows enhancement of MARC records with Accelerated Reader or Reading Counts quiz information. If the site has not subscribed to these services, they have the option of manually updated the quiz info. Users with this permission will see the Edit Quiz Info icon on the Title Details page allowing them to manually add Quiz info. Also, the user will see the Reading Programs option under the Catalog tab. With the permission, a user can upload and download files for enhancement.</p> <p>This permission also depends upon the user having one of the Library Search permissions (Basic, Power, Number, Barcode, Visual, Categories, or Brief Records).</p>
<input checked="" type="checkbox"/> ‡Enhance records with Lexile measure	<p>This permission enables the user to enhance the title records with Lexile information from the Follett Software Reading Programs Service. This permission also depends upon the user having one of the Library Search permissions (Basic, Power, Number, Barcode, or Brief Records).</p>


Library Catalog Management	Details
<input checked="" type="checkbox"/> ‡Enhance records with AllianceRecon	<p>This permission enables the user to enhance MARC records with information from Alliance Plus. The user has the choice to enhance only the brief library records or all library records through a retrospective conversion (Recon). A retrospective conversion is an automated process that enhances existing records with the following types of information:</p> <ul style="list-style-type: none"> ■ Reading and interest levels (521) ■ Subject headings (65X) ■ Review sources (510) ■ Publication dates (260_c) ■ Physical descriptions (300) ■ Notes (500,505,520) ■ Added entries (7xx)
<input checked="" type="checkbox"/> Update headings	<p>Enabling this permission causes the Global Update tab to appear under the Update Titles option (Catalog tab). The user will be able to use this feature to quickly find and update author, series, and subject headings in the bibliographic records. It then allows the user to find headings and edit headings already in the database to provide consistency and ease of searching for patrons. To be able to update headings, the user must also have the Manage Titles—Edit permission.</p>
<input checked="" type="checkbox"/> Globally update material type	<p>This permission gives the user the ability to globally update material types in the title record. The screen is located in the Global update sub tab, Update Titles in the Catalog tab. The user must also have the Manage Titles - Edit permission enabled.</p>
<input checked="" type="checkbox"/> Remove titles without copies	<p>This permission empowers a user to delete a title record that does not have local copies attached. In a centralized database, if other sites have copies in their database, the title will remain in the district database. This permission must be enabled along with Monitor/delete jobs under Administrative Access. The user will see the Update Titles option and the Remove Titles tab (Catalog tab).</p>

Library Materials Tab

Library Circulation Access	Details
<input checked="" type="checkbox"/> Check out library materials	This permission allows the user to check out library materials by typing and scanning barcodes. To retrieve a patron record, enable the following permission under the Access Levels option, Patrons tab: Patron Circulation Info Access/Barcode not required to find patrons .
<input checked="" type="checkbox"/> Check out library materials <input checked="" type="checkbox"/> Check out by homeroom	This permission allows the user to check out library materials by selecting a patron assigned to that homeroom.
<input checked="" type="checkbox"/> Check in library materials	This permission enables the user to check in materials under the Circulation tab.
<input checked="" type="checkbox"/> Renew library materials	This permission enables the user to renew materials under the Circulation tab.
<input checked="" type="checkbox"/> Change library due dates	<p>This permission enables the user to change the library due dates on materials checked to patrons. The permission enables the user to see the Calendar icon next to the item in the Checked Out section of the Check Out and Renew pages under the Circulation tab.</p> <p>To change due dates, a user must also have one of the following permissions:</p> <ul style="list-style-type: none"> ■ Renew library materials ■ Check out library materials
<input checked="" type="checkbox"/> Override library blocks	<p>This permission enables the user to override blocked transactions. A blocked condition occurs when a patron reaches one of the limits for the patron type. During a transaction, Destiny displays a message that begins with “[Action] Blocked:” and lists the limit(s) reached.</p> <p>The user must address the block condition or override it before continuing with the transaction. Users can proceed with the transaction if they have this permission. To override blocks during checkouts, the user must also have the Check out library materials permission. To override blocks during renewals, the user must also have Renew library materials permission.</p>

Library Circulation Access	Details
<input checked="" type="checkbox"/> Check out library materials <input checked="" type="checkbox"/> Add temporary titles during checkout	<p>Enabling this permission along with the Check out library materials permission allows the user to add temporary titles. A user with both the Manage Catalog – Manage titles – Add title options and the Check out library materials permissions can add temporary and permanent title, in Check Out under the Circulation tab. This also allows the message, “Copy is not cataloged. Do you want to check it out?” to appear when the user enters an unrecognized copy barcode. Clicking Yes allows the user to create a record. The Add Title button appears on the Check Out page next to the Find Copy button after the user retrieves a patron’s record.</p>
 <p>The screenshot shows a search interface with a 'Find' text box, a 'Go!' button, and three buttons: 'Find Patron' (with a person icon), 'Find Copy' (with a book icon), and 'Add Title' (with a book icon and a plus sign). The 'Add Title' button is circled in red. Below the buttons are checkboxes for 'Only my patrons' (checked) and 'Only search' (unchecked), and a dropdown menu set to 'Patron Names'.</p>	
<input checked="" type="checkbox"/> View library item status	<p>This permission enables the user to access and view library copy records from the Copy Status option under the Circulation tab.</p>

Library Materials Tab

Library Circulation Access	Details
<p><input checked="" type="checkbox"/> Mark library copies “lost”</p> 	<p>This permission enables the user to change a copy’s status to “Lost”. The user will see the Mark Lost button in Circulation and the Mark “Lost” hyperlink in the Copies unaccounted for list under Inventory option.</p> <p>The user must also have permission to view at least one of the following pages under the Circulation tab:</p> <ul style="list-style-type: none"> ■ Check Out ■ Check In ■ Copy Status ■ Patron Status
<p><input checked="" type="checkbox"/> View library information</p>	<p>This permission enables the user to access the Library Info option under the Circulation tab.</p> <p>Under the Due Dates tab, the user can view information for each patron type:</p> <ul style="list-style-type: none"> ■ Circulation Types ■ Loan Periods ■ Due Dates ■ Grace Dates ■ Fine Increments <p>Under the Statistics tab, the user can view Current Library Statistics for:</p> <ul style="list-style-type: none"> ■ Circulations (checked out, overdue, lost) ■ Materials (counts) ■ Holds (ready, pending, expired) ■ Patrons (counts) ■ Unpaid Fines (library and other fines) ■ Top Patrons ■ Top Homerooms/Grades ■ Top Titles

Fine Management	Details
<input checked="" type="checkbox"/> View library fines	<p>This permission enables the user to view library copy-specific fines from the Fines section in the patron record and view specific reports in the Job Manager.</p>
<input checked="" type="checkbox"/> View library fines <input checked="" type="checkbox"/> Add library fines	<p>This permission allows the user to assess library specific fines and the management of copy specific fine types. A user must have the View library fines permissions in order to Add library fines. The Add Fine button appears in the Fines section of a patron's record. This permission also enables viewing reports in the Job Manager.</p>
<input checked="" type="checkbox"/> View library fines <input checked="" type="checkbox"/> Pay library fines	<p>This permission enables the user to pay copy specific library fines. A user must have the View library fines permissions in order to Add library fines. Enabling this permission causes the Edit Fines and Update buttons to appear in the Fines section of a patron's record. (The Update button updates an edited total on a fine.) This permission also enables viewing reports in the Job Manager.</p>
<input checked="" type="checkbox"/> View library fines <input checked="" type="checkbox"/> Waive library fines	<p>This permission enables the user to Waive library fines. A user must have the View library fines permissions in order to Add library fines. Enabling this permission causes the Edit Fines button to appear in the Fines section of a patron's record. After selecting this button the Waive field will be editable. This permission also enables viewing reports in the Job Manager.</p>
<input checked="" type="checkbox"/> View library fines <input checked="" type="checkbox"/> Delete library fines	<p>This permission enables the user to Delete copy specific library fines. A user must have the View library fines permissions in order to Add library fines. Enabling this permission causes the Edit Fines button to appear in the Fines section of a patron's record. After selecting this button the Trash icon will be editable. This permission also enables viewing reports in the Job Manager.</p>

Library Materials Tab

Hold Management	Details
<input checked="" type="checkbox"/> View any patron's holds	This permission enables the user to view patron's library hold information. To access a patron's hold information, type or scan the patron's barcode in the Find Patron box and click Go! or press Enter to view the patron's record.
<input checked="" type="checkbox"/> View any patron's holds <input checked="" type="checkbox"/> Add/edit/delete holds for a patron	This permission enables the user to view, create, edit and delete holds. A user must have the View any patron's holds permissions in order to use this permission. The permission enables viewing reports in the Job Manager . To perform interlibrary loans (ILLs), a user must select the Allow library materials to circulate to all patrons in the district check box on the Catalog/Circulation tab in Site Configuration in the Back Office .
Administrative Access	Details
<input checked="" type="checkbox"/> Generate library collection reports	This permission enables the user to generate and view library reports.
<input checked="" type="checkbox"/> Generate library collection reports <input checked="" type="checkbox"/> Add/edit/delete Report Builder - library reports	This permission enables the user to create and manage custom library reports. The Report Builder has a wizard that guides a user through the creation of a customized report that may not be available under the Reports option. There are three Report Builder permissions--this one, Report Builder - patrons, and Report Builder - general. The patrons and general Report Builder permissions are enabled independently of the materials Report Builder.
<input checked="" type="checkbox"/> Add/edit/delete library policies	This permission enables the user to use the Library Policies option under the Back Office tab to customize library policies. Library policies define the circulation periods for library materials. They are based on a combination of Patron Types and Circulation Types . They are used by Destiny to automatically monitor and control checkouts, renewals, fine calculations, refunds, and holds.

Administrative Access	Details
<input checked="" type="checkbox"/> Change library site preferences	<p>This permission enables the user to edit the site configuration options that pertains to cataloging and circulation. It enables the option Site Configuration in the Back Office tab.</p> <p>Some of the configuration options include:</p> <ul style="list-style-type: none"> ■ Configuring searches including reading programs, language, visual search display, sorting of search results ■ Title Detail Configuration ■ Inventory configuration ■ Circulation or items to other sites ■ Patron picture display ■ Reserve/hold time perimeters ■ Barcode symbologies ■ User Defined fields ■ Circulation sounds
<input checked="" type="checkbox"/> Inventory library collection	<p>This permission enables the user to Inventory the library collection. Destiny accounts for copies each time a user adds to the collection, checks out, or marks them lost.</p>
<input checked="" type="checkbox"/> Inventory library collection <input checked="" type="checkbox"/> Start new/finalize library inventory	<p>This permission enables the user to start and configure a new inventory, and open an existing inventory and to finalize a library inventory. The user must have the Inventory library collection permission enabled.</p>
<input checked="" type="checkbox"/> ‡Set up One Search	<p>This permission enables the user to serve as the One Search administrator for the site. This person will be able to set up and choose the databases that students and staff can access using the One Search button on the Library Search page and the Power Search page. The administrator will also be able to generate a database usage report. The permission causes the Search Setup option under the Back Office tab to appear with a One Search tab.</p>

Library Materials Tab

Administrative Access	Details
<input checked="" type="checkbox"/> ‡Set up WebPath Express	This permission enables the user to serve as the WebPath Express administrator for the site. This person will be able to customize the content that WebPath Express displays to patrons at the elementary, middle, or high school level. The permission causes the Search Setup option under the Back Office tab to appear with a WebPath Express tab.
<input checked="" type="checkbox"/> Set up Visual Search	This permission enables the user to serve as the Visual Search administrator for the site. This person will be able to customize the icons and links that display to patrons using Visual Search under the Catalog tab. The permission causes the Search Setup option under the Back Office tab to appear with a Visual Search tab.

Patrons Tab

The next table explains how to assign or enable the permissions under the **Back Office** tab, **Access Levels** option, under the **Patrons** tab. The Access Levels that grant maintenance permissions for patron records are sensitive with reference to legal and security issues that may arise out of the improper release of certain records.

The groups of permissions (with page numbers) are:

- Patron Management (page 27)
- Patron Circulation Info Access (page 29)
- Administrative Access (page 29)
- Fine Management (page 30)
- Self-Empowered Patron Access (page 30)

Note: Permissions appearing in gray are similar to prerequisites. They must be enabled before the permissions in black that follow. Otherwise, Library Manager returns an error message.

Patron Management	Details
<input checked="" type="checkbox"/> Find/add/edit/delete patrons	This permission enables the Find Patron and Add Patron options under the Back Office tab and allows the management of patron records. It also <i>omits</i> access to the following fields in the patron record: Access Level , User Name , and Password . Library Manager will assign the Default access level selected by the administrator to the new patron record. A user with the Edit patrons/passwords permission will be able to fill the User Name and Password fields. An administrator may want to consider granting both Find/add/edit/delete patrons and Edit patrons/passwords permissions at the same time.
<input checked="" type="checkbox"/> Find/add/edit/delete patrons <input checked="" type="checkbox"/> Merge duplicated patron records	This permission allows the user to retrieve duplicate patron records, select the preferred record and merge the duplicates into one record. Destiny retains the preferred record and its current transactions and statistics. Destiny then merges the current transactions, statistics and other information from the deleted patron record. Destiny does not retain the patron notes from the deleted patron record.

Patrons Tab

Patron Management	Details
<input checked="" type="checkbox"/> Find/add/edit/delete patrons <input checked="" type="checkbox"/> Update patrons	<p>The Update patrons permission is not valid unless the Find/add/edit/delete patron permission is enabled. This permission adds the Update Patrons option under the Back Office tab. A user will have the ability to update and delete patron records individually, by batch, and globally.</p>
<input checked="" type="checkbox"/> Import patrons	<p>This permission enables the Import Patrons, Upload Pictures, and Job Manager options under the Back Office tab. If the districts imports data at the district level, an administrator may not want to enable this permission at the site level. Import patrons includes the option for importing an ASCII comma delimited text file.</p> <p>The user with Import patrons permission must be able to apply the matching logic required on the screen. This permission also enables the Upload Pictures option, enabling the user to add single images or a batch to patron records. This permission enables the Job Manager, which grants access to view all reports at the site level.</p>
<input checked="" type="checkbox"/> Export patrons	<p>This permission allows a user to export all or a portion of the patron database by creating a downloadable XML file. This permission does <i>not Delete Patrons</i>. This permission enables the Job Manager, which grants access to view all reports at the site level. The permission View Patron Status must be enabled to view this feature.</p>
<input checked="" type="checkbox"/> View patron notes	<p>This permission allows the user to view a note previously added to the patron record when the patron's record is accessed.</p>
<input checked="" type="checkbox"/> View patron notes <input checked="" type="checkbox"/> Add/edit/delete/ hide patron notes	<p>Add/edit/hide/delete patron notes enable the user to manage remarks made on a patron's record. If the user has this has permission, he or she will be able to create, edit, hide and delete a note. Notes appear in the record with the most recently created at the top of the list. If the note contains sensitive information, the user can hide the note so that it will appear only on the Patron Status screen and not during circulation of materials. During circulation, if there is a hidden note, a Note icon appears on the screen.</p>

Patron Circulation Info Access	Details
<input checked="" type="checkbox"/> Barcode not required to find patrons	<p>This permission enables a user to search for patrons by keyword and retrieve patrons by browsing a list of all patrons. The user must have at least one of the following permissions to access this feature:</p> <ul style="list-style-type: none"> ■ Check out library materials ■ Check in library materials ■ View library fines ■ View any patron holds ■ View Patron Status
<input checked="" type="checkbox"/> View patron status	<p>This permission allows the retrieval and viewing of patron information. The user will be able to search by barcode only. This permission does not give the user the ability to see the checkout history.</p>
<input checked="" type="checkbox"/> View patron status <input checked="" type="checkbox"/> View library items out	<p>This permission enables the user to view the library items that a patron has checked out. It requires the View patron status permission as a prerequisite. This permission does not give the user the ability to see the checkout history.</p>
Administrative Access	Details
<input checked="" type="checkbox"/> Generate patron reports	<p>This permission enables the user to create all the reports listed under the Patrons tab of the Reports option. This permission enables the local user full access to the Job Manager and all reports created at the site.</p> <p>To be able to delete reports, the user must have the Monitor/delete site's jobs permission under the General tab.</p>
<input checked="" type="checkbox"/> Add/edit/delete Report Builder - patron reports	<p>This permission enables the user to see the Patron drop down option in the Report Builder tab under the Back Office tab, Reports option. The Report Builder has a wizard that guides the user through the creation of a customized report that may not be available under the Reports option. There are three Report Builder permissions--this one, Report Builder - library materials, and Report Builder - general. The library materials and general Report Builder permissions are enabled independently of the patrons Report Builder..</p>

Patrons Tab

Administrative Access	Details
<input checked="" type="checkbox"/> Edit patron passwords/logins	This permission enables the user to change the User Name, New Password, and Confirm Password fields in the patron record. Find/add/edit/delete patrons must be enabled for this permission to be valid.
<input checked="" type="checkbox"/> Change patron site preferences	This permission enables the user to edit or configure patron-related preferences under the Back Office tab, Site Configuration option. These preferences are: <ul style="list-style-type: none"> ■ Display patron pictures ■ Preferred (patron) Barcode Symbologies ■ Customize User-Defined Patron Field Names ■ When searching for patrons during circulation, display patron fields
Self-Empowered Patron Access	Details
<input checked="" type="checkbox"/> View own status	This permission enables users to view current transactions under the My Info tab. The screen has a Printable button. The screen lists: <ul style="list-style-type: none"> ■ Checkouts ■ Fines ■ Holds ■ Bookings
<input checked="" type="checkbox"/> View own status <input checked="" type="checkbox"/> Renew own library materials	This permission enables user to see Renew and Renew All buttons on the Patron Status page under My Info . The View own status permission is a prerequisite. The user will be able to renew his or her checked out materials. Note that the ability to renew may also be affected by Library Policies and patron types.
<input checked="" type="checkbox"/> Place hold for self from catalog	When this permission is enabled users may place a hold for themselves on library materials from the Title Details page under the Catalog tab.

Self-Empowered Patron Access	Details
<input checked="" type="checkbox"/> Place hold for self from catalog <input checked="" type="checkbox"/> Place reserve for self from Catalog	<p>The difference between a hold and a reserve is that a reserve asks for an item at a specific date range in the future, while a hold asks for the next available copy. Enabling this permission along with Place hold for self from catalog enables the user to request one or multiple copies for a specific future date range.</p>
<input checked="" type="checkbox"/> Check out library eBooks for self from Catalog	<p>The user with this permission will see the button at left on the Title Details page for an Follett eBook. This permission enables the user to check out an eBook.</p>
<input checked="" type="checkbox"/> Create multiple lists (At least one “Access my lists...” right is needed)	<p>This permission enables the Resource Lists option under the Catalog and My Info tabs. The user will be able to create, edit, and delete multiple lists of library materials, State Standards, and any One Search or WebPath Express results.</p>
<input checked="" type="checkbox"/> Create multiple lists (At least one “Access my lists...” right is needed) <input checked="" type="checkbox"/> Publish My Lists	<p>The user with this permission has the right to make any list visible to other patrons in the site. The Access My Lists permission is a required permission. Note in the screen capture below that there is a Public Lists tab. This user can see public lists from the other patrons at the site.</p>
<input checked="" type="checkbox"/> Create multiple lists (At least one “Access my lists...” right is needed) <input checked="" type="checkbox"/> Save and email lists (SMTP server required for email)	<p>This permission enables the user to send a copy of a list via email if an SMTP server has been configured by the Destiny Administrator for the district.</p>
<input checked="" type="checkbox"/> View Public Lists	<p>This permission enables the user to see lists made public by other users. The user must have the Access My List permission enabled.</p>
<input checked="" type="checkbox"/> Recommend titles to other users	<p>Users with this permission can send title recommendations to other patrons. The recommendation will appear in the recipient’s My Info tab, so they must have the ability to login to Destiny and must also have the View own status permission.</p>

Patrons Tab

Fine Management	Details
<input checked="" type="checkbox"/> View patron fines	This permission allows a user view patron specific fines. The View History button will be visible if this permission is enabled. This feature requires the View Patron Status permission to be enabled.
<input checked="" type="checkbox"/> View patron fines <input checked="" type="checkbox"/> Add patron fines	This permission allows the user to add and manage patron specific fines and fine types. This feature requires the View Patron Status permission to be enabled.
<input checked="" type="checkbox"/> View patron fines <input checked="" type="checkbox"/> Pay patron fines	This permission allows the user to accept payment for patron specific fines.
<input checked="" type="checkbox"/> View patron fines <input checked="" type="checkbox"/> Waive patron fines	This permission allows the user to waive patron specific fines. This enables the Edit Fines (the waive field is available). The View Patron fines and View Patron Status permissions must be enabled to use this feature.
<input checked="" type="checkbox"/> View patron fines <input checked="" type="checkbox"/> Delete patron fines	This permission allows the user to delete patron specific fines. This enables the Edit fines and Delete fines buttons/icons. The View Patron fines and View Patron Status permissions must be enabled to use this feature.



General Tab

This section explains how to assign or enable the permissions under the **Back Office** tab, **Access Levels** options, under the **General** tab.

The groups of permissions (with page numbers) are:

- Help Access (page 33)
- Administrative Access (page 34)
- Historical Info Access (page 34)

Note: Permissions appearing in gray are similar to prerequisites. They must be enabled before the permissions in black that follow. Otherwise, Library Manager returns an error message.

Help Access	Details
<input checked="" type="checkbox"/> Access Destiny online help & support	<p>This permission enables the interactive Destiny help system. Online help accesses a database at Follett Software Company through the internet. Online help contains the operations manual for Library Manager. The hyperlink shown at left appears at the upper right of the screen.</p> <p>All users automatically have access to on-page help. Selecting the question mark next to a specific feature, setting, or page displays on-page help for that feature. The information relates directly to the feature next to the on-page help icon, or to the page as a whole.</p>
<input checked="" type="checkbox"/> View Destiny important info	 <p>Important information includes news about product updates and patches. The icon at left will appear near the Help hyperlink in the upper right corner of the screen. The user with this permission enabled will be able to see the icon. It will be hidden from other users.</p>
<input checked="" type="checkbox"/> View Destiny news	 <p>This icon accesses news of special promotions from Follett Software. It also appears on the upper right corner of the screen for the user with this permission enabled.</p>

General Tab

Administrative Access	Details
<input checked="" type="checkbox"/> Edit open/closed days and hours	This permission enables the Calendar/Hours option under the Back Office tab. The user will be able to set hours of operation and open/closed days for circulation purposes. This is a site level permission. Each site can set its own hours and days of operation. Sites that have more than one product (Textbook Manager, Asset Manager, Media Manager) will share this calendar.
<input checked="" type="checkbox"/> Monitor/delete site's jobs	This permission enables the Job Manager under the Back Office tab. It enables the local user full access to the Job Manager and all reports created at the site.
<input checked="" type="checkbox"/> Monitor/delete site's jobs <input checked="" type="checkbox"/> Delete jobs by date started	Delete jobs by date started requires Monitor/delete site's jobs to be valid. The user will see an additional field at the bottom of the Job Manager screen.
<input checked="" type="checkbox"/> Manage Site Administration Options	This permission allows the user to set up homerooms and assign supervisor information to them. The information is entered via the Site Administration tab under the Site Configuration option in the Back Office .
<input checked="" type="checkbox"/> Update site information	This permission enables the user to update information on the Site Info tab under the Site Configuration option in the Back Office .
<input checked="" type="checkbox"/> Add/edit/delete Report Builder - general reports	This permission enables the user to see a Report Builder tab under the Back Office tab, Reports option. The Report Builder has a wizard that guides a user through the creation of a customized report that may not be available under the Reports option. There are three Report Builder permissions--this one, Report Builder - patrons , and Report Builder - library materials . The patrons and library materials Report Builder permissions are enabled independently of the general Report Builder.
Historical Info Access	Details
<input checked="" type="checkbox"/> Access library checkout history	This permission enables the View History button on the Patron Status page. All of the past and current transactions become visible to the user. This permission warrants careful consideration before enabling because of confidentiality issues.

This completes the Library Manager Access Levels Reference Guide. If the you have other Destiny products, your account manager will provide separate reference guides for Textbook, Media, and/or Asset Manager.