

other requests. Other responsibilities for the effective implementation of the PINES software fall on the local library system administrators, and this manual is intended to be a guide for effectively administering the PINES software at local library branches. This guide focuses on the administration of the Evergreen ILS, which is a product originally developed by the Georgia Public Library Service for the PINES consortium.

1.1. The PINES Local System Administrator

Each PINES library system is required to have a Local System Administrator (previously called "Ops Manager" or "OPSM" - a term from PINES' previous ILS), who is responsible for being a single point of contact for consortium-level technical information. This staff person is also considered the "technical lead" responsible for installing and upgrading PINES software, locally-set system settings, creating and running statistical reports, and submitting tickets to the GPLS Helpdesk.

1.2. The Evergreen “LocalAdmin” Role

PINES staff members are each assigned a permissions profile or "role" for work within Evergreen.

At the local system level, the highest-level permissions profile is LocalAdmin. This role can only be assigned by PINES/GPLS staff at the request of a PINES Library Director. Evergreen allows more than one LocalAdmin staff per library system, so this role can be assigned to others as needed, though it is recommended to limit this role to only two or three trusted individuals at the most. Staff with the LocalAdmin role are able to edit local library settings, and create and run statistical reports. The LocalAdmin may also assign permission levels to other library staff (with some exceptions) and may add specific permissions to individual staff members. Please note that there is a distinction between the "Local System Administrator" position and the "LocalAdmin" permissions profile.

1.3. About Evergreen

Evergreen is the integrated library system (ILS) originally developed by the Georgia Public Library Service specifically for use by PINES. Evergreen is open source, which means that the source code, the human-readable computer files written by programmers, is licensed to be shared freely with others for nearly any purpose. This results in some practical advantages for PINES:

- There are no licensing fees associated with downloading and installing the software
- There is an “Evergreen Community” of developers, documentation writers, and fellow end users who, like PINES, contribute to the feature set of Evergreen to the benefit of all. PINES library staff are encouraged to participate in the larger Evergreen Community as much as possible.
- Since Evergreen was originally written to accommodate PINES policies and procedures, there are far fewer workarounds as there would be for an off-the-shelf proprietary ILS
- PINES/GPLS staff maintains an Evergreen development queue of feature requests made by PINES librarians and directors, meaning PINES library staff still have a hand in the design of Evergreen.
- Proprietorship of the "Evergreen" name and logo is held by the Software Freedom Conservancy [<http://http://sfconservancy.org/>] on behalf of the Evergreen Community. Evergreen is shared under the GNU General Public License (GPL) [<http://www.gnu.org/licenses/gpl.html>], version 2 or later.

Evergreen is built as a web-based client-server program. The PINES implementation of Evergreen is hosted on a server cluster, a group of servers configured to act as one server, located in a collocation

facility just outside the Metro Atlanta area. This cluster, and its server-level software programs, is managed by PINES/GPLS staff with the assistance of state-paid contractors. The administration for which Local System Administrators are responsible exists in the Evergreen Staff Client.

1.4. The Evergreen Staff Client

The Evergreen Staff Client is a web-browser-like program that is installed on library staff computers and connects with the PINES server cluster for its content. The staff client is built on xulrunner, which is a program also serves as the foundation for Mozilla Firefox, Mozilla Thunderbird, and other popular open source applications. All staff client communications occur over secure sockets layer (SSL) connections, which encrypts all information sent to and from the client, making it secure for both wired and wireless network connections. Installation, upgrading, and troubleshooting of the Evergreen Staff Client is a responsibility that falls to the PINES Local System Administrator.

Web-Browser-Based Staff Client

There is a web-browser-based version of the staff client being developed by Equinox Software and members of the Evergreen Community that will replace our current staff client. We expect this change to alleviate much of the inconvenience of server upgrades since Local Admins will no longer need to install a separate client. We do expect that web-browser add-ons will be required to handle printing and standalone functionality. There is a public demo server showing the in-development client at <https://webby.evergreencatalog.com/eg/staff/> (username: admin, password: demo123). GPLS is co-funding development for this project and PINES/GPLS staff are monitoring it closely. We do not currently have an estimated date on which PINES libraries will transition to the web client.

1.5. Copying

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2. PINES Local System Administration Basics

2.1. Downloading and Installing the Evergreen Staff Client

A download link to the current version of the Evergreen Staff Client may found at <http://gapines.org/updates/manualupdate.html>. If your library uses a non-Windows platform such as Mac OS X or Linux on your staff stations, PINES/GPLS staff will make every effort to assist, but in general, the PINES/GPLS staff limits its technical support to current staff client versions running on Windows platforms.

2.2. Assigning a Workstation Name

The Evergreen staff client must be assigned to a library and given a unique name before it will connect to the Evergreen server. The only restriction is that the workstation's name must be unique

within the assigned library. Make sure to select a workstation name that you will remember later, and reflects the role, purpose, and/or location of a particular computer. These names will come up later in statistical reporting, and can also be handy when troubleshooting. As of Evergreen 2.1.1, the workstation field will be pre-populated with the library short name and the computer name.

In PINES, the LocalAdmin role has the ability to assign workstation names in his or her library system. Users with the LibraryManager role have the ability within their branch. To assign a workstation a name, log in to the system. You will be prompted to assign the workstation a library and a name. Select the policy name of the library where this workstation physically operates from the drop down menu (e.g., “MGRL-MA”). Type in a descriptive name for the workstation, then click Register. If the workstation name exists, an alert window will appear, allowing you to either force the assignment or to cancel out to pick a unique name. The station is now ready for staff to login and use.

2.3. Creating Staff Users and Assigning Permission Profiles

Staff users and patron users are created the same way, using the Evergreen User Editor (Circulation → Register Patron or Shift + F1). PINES LocalAdmins can assign the LibraryManager, Cat2, Cat3, and Circ1 – Circ4 permission groups. PINES/GPLS staff can assign LocalAdmin permissions to any user designated by the Library Director, and Cat1 access is granted to catalogers who have been approved by the PINES Cataloging Specialist. See the Evergreen User Permissions section for more information.

The PINES/GPLS staff strongly recommends the use of personalized Evergreen accounts for logging into staff functions. This eases troubleshooting and allows library staff to audit particular staff members actions, and provides a more secure and accountable system. Use of generic logins (e.g. "WGRL-HQ-Circ1" and the like), is strongly discouraged.

Tip

It is important to remind library staff members that their personal library cards and their staff accounts are one and the same. Some staff users have gotten confused when they change their password via the OPAC and are then unable to login to the staff client, for instance.

2.4. Upgrading the Evergreen Staff Client

For the Evergreen Staff Client to work with the server, it must be a compatible version. As of this writing, PINES is running Evergreen version 2.7.2. Staff clients that are not version 2.7.2 will not work with the PINES software. If you attempt to run a version of the staff client that is older (such as 2.5.1, which was PINES installed Evergreen version through March 2013) or newer, you will get an error that your staff client is not supported by the server. If your staff client has autoupdate capability (Evergreen 2.1.1 and forward), you will be prompted to check for a new version of the staff client and be able to automatically upgrade. If, for whatever reason, you are unable to use the autoupdate feature, you will need to manually download the correct staff client from <http://gapines.org/updates/manualupdate.html>. Autoupdate is only available for Windows staff clients at this time.

Since Evergreen server software upgrades are done so to not interfere with library business, all staff workstations must be upgraded on the morning after a server upgrade. PINES staff will

communicate upgrade dates to the PINES libraries via updates to the PINES webpage (<http://pines.georgialibraries.org>) and to the PINES email lists. Local System Administrators are responsible for coordinating or performing staff client upgrades for their individual systems. PINES/GPLs staff requires that libraries perform this upgrade before submitting Helpdesk tickets regarding problems with a new release.

2.5. Creating Multiple Staff Client Profiles

There is often a need for Local System Administrators to be able to log into the staff client with their workstation registered as another library unit. In the past, this has involved complicated workarounds, but the Evergreen Staff Client has a built-in feature that allows creation of multiple profiles, and it involves a one-time edit of the desktop shortcut icon as follows:

1. Right-click on the Evergreen Staff Client shortcut on your desktop (this will also work in your Start Menu – just right click on the Evergreen Staff Client entry) and select Properties.
2. In the window that comes up, add “-profilemanager” (no quotes, with a space before the dash) to the end of the command listed in the Target field. Click Apply, then OK to close the window. The resulting entry in Target will be (quotes included here): "C:\Program Files\Evergreen Staff Client\xulrunner.exe" application.ini -profilemanager
3. Close all running Evergreen Staff Client sessions, then double click on the icon you just edited. You will see a new window titled “Evergreen – Choose User Profile.”
4. Click Create Profile . . . which will open a simple wizard interface
5. When you click Next, you can name your new profile. There is no need to change the default folder, but that option is given here, too. Click Finish.
6. You will then see your newly created profile as an option to use.
7. When you select the new profile, you may create a new workstation. Repeat this process for each organizational unit you would need to access.

Tip

the “Don’t ask at startup” checkbox option applies to any other shortcuts to the Evergreen staff client you use (that you haven’t edited with the -profilemanager option). If unchecked, this window will always appear. If checked, this window will only appear when you use the edited shortcut. The other unmodified shortcuts will assume that you want the last profile you selected to be your default profile.

3. Evergreen Local System Administration

3.1. Workstation Configuration

Workstation settings within the Evergreen Staff Client are set via interfaces available from the Admin → Workstation Administration menu.

Controlling Font Sizes and Sound

There are two boxes in the window, "Adjust Sound" and "Adjust Global Font." Adjust Sound has a single checkbox setting which, if checked, disables sound for the workstation. "Save to Disk" saves the changes to your computer's hard drive, making the change persistent.

Adjust Global Font allows you to click on the size font you would like to choose as your default size. Each column of buttons affects the same default font (as opposed to a different font setting for each column) and is presented this way to easily tailor your font.

Tip

Sizes other than the default setting may break page designs within the staff client, though they would not affect functionality. Also, some text sizes may not be alterable from within the staff client and would have to be globally changed in Windows appearance settings.

Hotkeys

"Hotkeys" are the keyboard combinations that invoke different staff client functions, which are notated beside each staff client menu option (e.g. "Check Out Items F1"). The Hotkeys menu and submenus allow personalized configuration of the staff client and how it behaves on a per-workstation basis.

- Disable Hotkeys - disables/enables keyboard shortcuts (e.g. Ctrl-T for new tab)
- Current
- Default - the default hotkey set
- Minimal - a more minimal set - only window-related hotkeys
- None - disables Hotkeys
- Set Workstation Default to Current - preserves the selected setting under Current for this workstation
- Clear Workstation Default - un-does the above workstation setting

The Toggle Hotkeys button in the staff client toolbar allows you to quickly enable or disable hotkeys altogether. This feature would be useful if one were running another program alongside the Evergreen staff client that required similar keyboard commands that would otherwise be in conflict.

Printer Setup

Setting up printers to work with the staff client is a two step process.

1. Install and configure the printer to work with Windows. This step does not involve the Evergreen Staff Client at all and will vary from printer to printer. Please consult your printer's documentation for details.
2. Configure the staff client to print to specific printer for specific functions. This is described below.

The Printer Settings Editor (Admin → Workstation Administration → Printer Settings Editor) is an interface that allows the Local System Administrator to configure options for which printer Evergreen uses for different types of printing. There are five "contexts" from which you can set your printing preferences:

1. Default – selects the "fallback" printer if there are no other contexts selected. If there is a single printer connected to the workstation being configured, this would be the only option to set.
2. Receipt – sets the printer for checkout, checkin, and holds/transit receipt printing.
3. Label – sets the printer for spine label printing.
4. Mail – sets the printer for printing mailing labels (available from the checkout screen as well as in some other functions that PINES does not currently use).
5. Offline – sets the printer to be used by the offline staff client.

For each context, click the radio button beside each one, then click "Set Default Printer and Print Test Page".

There is also an option, "Print silently when using Mozilla Print", which controls whether or not the printer dialog is invoked each time something needs.

See <http://pines.georgialibraries.org/printers> for more details about printer setup.

Receipt Template Customization

Evergreen allows individual libraries to customize their receipts using editable templates. The interface is accessible by going to Admin → Local Administration → Receipt Template Editor. At the top of the screen is a drop-down menu that allows you to select which receipt you would like to edit. Below that menu is a grayed-out drop-down menu labeled "Type." This refers to the type of "item" (or "object" in programmer-speak) from which the template values are drawn. The "Macros," which are the items surrounded by % marks, are "placeholders" for the actual information you would like to appear, and certain macros are available for each "Type" of object. To see a list of available macros, click the "Macros" button on the upper right of the screen. You can highlight a macro, then use Ctrl-C to copy and Ctrl-V to paste the macro into the receipt area. Click "Preview" to refresh the Preview pane and see your changes.

"Default" returns the active template to the default setting and "Save Locally" allows you to keep the changes persistent at that workstation. "Export" allows you to save the templates file to an external medium (such as a USB pen drive), and "Import" allows you to import that templates file into another workstation's staff client for consistency across your library's workstations.

To add library names and courier codes in large type to your library's transit receipts, add the following lines to the "transit_slip" and "hold_transit_slip" receipt templates: `%route_to%
 %courier_code%`

See <http://pines.georgialibraries.org/receipt-templates> for more information.

Toolbar Customization

The Toolbars sub-menu allows customizations that can be saved on a per-workstation, per-user, per-library, or per-system basis.

- Current
 - circ - selects the circulation toolbar
 - cat - selects the cataloging toolbar
 - custom options would appear here too
 - Default - selects the default toolbar as set in the Library Settings Editor. In PINES, the default is "circ".
 - None - disables the toolbar
- Icon Size - allows you to select Large or Small icons
- Label Position - allows you to select whether the labels appear next to or under the icons
- Mode - allows you to display icons, labels, or both
- Set Workstation Default to Current - preserves the selected setting under Current for this workstation
- Clear Workstation Default - un-does the above workstation setting
- Configure Toolbars - allows you to create new custom toolbars available to your user login, workstation, library, or system

To create a toolbar, follow these steps:

1. Go to Admin → Workstation Administration → Toolbars and select Configure Toolbars.
2. Click on the New Toolbar button in the upper right of the screen. Provide a label for the new toolbar. The new toolbar should appear on the list in the top window.
3. Click on items in the lower left window and click the "(A) -#" button to add elements to the right window. The elements you add will appear in a top-to-bottom order in the right window, which corresponds to a left-to-right order in the resulting toolbar. To remove an element, select it in the right window and click the "#- ®" button.
4. When finished, select the owning unit (library or system) from the dropdown and select the radio button labeled Owing Org Unit to make this toolbar available to your library or system. Alternatively, select Owing Workstation for the change to affect the current workstation or Owing User, which will make it available to your own account whenever you log in.

There are several permissions that must be assigned for a user to be able to manage toolbars:

- ADMIN_TOOLBAR - required to enter the toolbar interface
- ADMIN_TOOLBAR_FOR_ORG - required to be able to save a system- or library-owned toolbar
- ADMIN_TOOLBAR_FOR_USER - required to be able to save a user-owned toolbar
- ADMIN_TOOLBAR_FOR_WORKSTATION - required to be able to add a workstation-owned toolbar

Each of these permissions is granted to LocalAdmins so that they are grantable to other staff members within your system as needed.

3.2. Library Configuration

Library System/Branch configuration is done via the Admin → Local Administration Menu. Many items reside in this menu area that were developed by other Evergreen-using libraries and have no current use in PINES. Others are set at the PINES consortium level by PINES/GPLs staff.

Tip

Just because a feature is listed in the Local Administration menu does not necessarily mean that it is available to staff with the LocalAdmin permission profile, because PINES manages so much centrally, as opposed to on a per-library basis.

Cash Reports

This interface reports the amount of money taken in per workstation and totals cash, check, and credit card payments taken the previous open day.

Setting Library Closed Dates

Available by going to Admin → Local Administration → Closed Dates Editor. This interface allows you to enter a library closing for your library branches.

- Select the library for which you are entering a closing from the "Edit Closed Dates for:" dropdown menu. A list of currently-entered closings will appear in date order.
- To add a closing, select either "Add Single Day Closing" or "Add Multiple Date Closing" and carefully enter the dates, either by selecting from the built-in calendar tool (preferred) or by typing in the dates in YYYY-MM-DD format.
- Then enter a reason for the closing and click "Save."
- If your entire library system has the same closed date, you can check the "Apply to all of my libraries" checkbox before saving. This will add the closing to each individual library's list of closings.
- The "Add Detailed Closing" feature, which allows closings for specific times of the day, is not currently used in PINES.

Tip

If incorrect dates are entered, for example, the start date is in 2010 but the end date for the closing is in 2009, the dates will not work at all. Please check these carefully since the system does not alert you if you make this kind of mistake and it causes great confusion!

Adding a closing has the following consequences:

- During the closed dates (inclusive), books will not be due. If a closing is added on a day when books are already due, they will be considered due on the next available open date.

- Holds will not target copies in a closed library. Hold lists will not print on closed dates.
- Patrons will not be charged fines on closed dates. If the closing is added after the closed date has occurred, charges that have already accrued on patron accounts must be manually removed by staff.

Tip

The fines generator for PINES runs each morning at 12:30 a.m., meaning that the fines for each day have already accrued before the library workday starts. In cases of emergency closings for inclement weather, etc., PINES/GPLS staff can run a process that will batch void fines accrued for those days.

Note

Library Closed Dates are not the same thing as Library Open Hours, which are set by PINES staff.

Setting the Copy Location Order for Holds Pull Lists

This is required for the "Print Full Pull List (Alternate Strategy)" option to sort by shelving location (or in any meaningful order).

Setting up or Editing Copy Locations

Available by going to Admin → Local Administration → Copy Locations Editor.

Existing Copy Locations for the Workstation's library unit appear in the lower part of the screen. The focus location can be changed via the "Focus Location" dropdown menu. Copy Locations may be edited or deleted from this section.

Copy Locations can be set at either the System or the Branch level. System-level Copy Locations will be available to all libraries in the system. Branch-level Copy Locations are only available to the individual branch. The "PINES" copy locations are grayed out, as they are administered by PINES/GPLS staff.

The top interface allows you to create a new copy location and has the following fields:

- Name – the text name for the Copy Location, which is visible in the OPAC (for OPAC visible copy locations)
- OPAC Visible – this sets whether items in this Copy Location may be found in the OPAC by patron searches.
- Hold Verify – this setting is not used in PINES and its purpose is currently unknown. Please select "No" for this field. *oldable – this sets whether the items in this Copy Location are eligible for patron hold requests.
- Circulate – this sets whether the items in this Copy Location circulate.
- Owning Library – allows you to set the owning library or system.

If a Copy Location setting is set to "Yes," then item-level settings determine OPAC visibility, holdability, and circulatability. If a Copy Location setting is set to "No," item-level settings are overridden.

Library Settings Editor

Available from Admin → Local Administration → Library Settings Editor. The available functions include settings that PINES sets globally, rather than just local library/system settings. Each setting is controlled by permissions settings.

The following settings are available for local systems to configure as needed:

- **Courier Code** – This controls the value of the %courier_code% macro for your library in the Receipt Template Editor. This should be already set with your stat courier code.
- **Default Item Price** – This sets the price of items where the actual price is not listed in the item record.
- **Library Information URL** - This sets the URL for your library's web site, which is visible to patrons in the OPAC.
- **Long-Overdue Materials Processing Fee** - This sets the amount charged for a processing fee for longoverdue items in your library system.
- **Lost Materials Processing Fee** – This sets the amount charged for a processing fee for lost items in your library/system.
- **OPAC Inactivity Timeout (in seconds)** – This setting defines how much time a patron can be idle at an OPAC before being automatically logged out. System default is 7 minutes (420 seconds). PLEASE NOTE: This affects patrons both inside the library and logged in from home.
- **Selfcheck: Patron Login Timeout (in seconds)** – This sets a timeout for a patron logged into Evergreen's built-in selfcheck interface.
- **Selfcheck: Pop-up alert for errors** – This setting controls whether or not patrons receive pop-up alert messages when errors occur in Evergreen's built-in selfcheck interface.
- **Selfcheck: Require patron password** – This setting controls whether Evergreen's built-in selfcheck interface requires a patron to enter a password upon login.
- **Sending email address for patron notices** – This allows library staff to set an email address that will appear to the person receiving emails from Evergreen to be the sending address. This address receives any bounced emails, allowing for patron account corrections.
- **Staff Login Inactivity Timeout (in seconds)** – This setting defines how much time a staff member can be idle at a staff client before being automatically logged out. System default is no time limit.

Settings may be changed by clicking "Edit" beside the setting you are trying to change. A box will pop up, sometimes containing a description of the setting, sometimes not. "Context" allows you to set at which level you would like to have your settings apply. If settings are applied at the system level, they will also apply to all system branches. If set for the individual library, the settings will be limited to that one library. "Delete Setting" will remove the setting's values from your library and restore them to the system default.

Tip

The number of available library settings has grown exponentially over the last few years. You can type keywords into the "Filter" box to filter out irrelevant settings.

Tip

Great care should be taken when changing library settings, as they will affect the operations of your entire library or system. Please contact PINES staff if you would like to test settings for your system on a PINES test instance of Evergreen before "going live" with your changes.

Set Up or Edit Non-Cataloged Types

Available from Admin → Local Administration → Non-cataloged Types Editor. This interface is where you can set up or edit locally-defined non-cataloged items. The list of non-cataloged types appears in the lower part of the screen, and includes whichever non-cat types set for the "Focus Location" (changeable via the dropdown menu). These will appear to your library's staff from the Checkout interface. A new non-cataloged type can be created in the top interface by entering a name, selecting the time the item will circulate, whether it circulates in-house, and the organizational unit (system or individual branch) for which you would like the type to be available.

View Patrons with Negative Balances

Admin → Local Administration → Patrons with Negative Balances. This allows you to look up patrons with negative balances on their accounts per library (or system). Because of the size of the PINES user and billings database, this may not function as expected.

Add/Edit Statistical Categories

Available from Admin → Local Administration → Statistical Categories Editor. This interface allows your library system to set up or edit locally-defined statistical categories for copies or patrons. These statistical categories can then be set when adding patrons or cataloging copies and then used to generate reports on copy usage or patron statistics. Use of statistical categories is entirely optional and governed by local needs (with a single exception, noted below).

The list of existing statistical categories appears in the lower part of the screen, and includes whichever categories set for the "Focus Location" (changeable via the dropdown menu). There are two types of statistical categories, Patron and Copy:

Copy Statistical Categories

Once set, these can be applied to individual copies in the Item Attributes Editor, available to cataloging staff. The "Legacy CAT1" and "Legacy CAT2" categories were added to Evergreen to ensure continuity in reporting abilities from PINES' previous automation system.

Patron Statistical Categories

Once set, these can be applied to individual patrons in the Evergreen User Editor ("5. Statistical Categories"). The Non-English Primary Language is a category required by PINES policy, but any other categories are entirely up to local systems as to whether/how they are used.

A new statistical category can be created in the top part of the screen by entering a name for the category, choose whether the category will be visible on the public OPAC, the owning library, and the type. Statistical categories owned by library systems are available to all system libraries, while an individual library's categories are only available to that single unit.

Surveys

The Surveys interface has been improved in Evergreen 1.6.1.8. Detailed instructions with screenshots for creating surveys may be found in the official Evergreen documentation at <http://docs.evergreen-ils.org/1.6/draft/html/lisa-survey.html>.

View Items in Transit To/From Your Library

The Transit List feature provides a method for quickly reporting which items are in transit to or from a library with a common set of date ranges.

Work Log

Allows you to view staff actions within the staff client and retrieve patrons or items for each action.

3.3. OPAC IP Range Redirection

PINES libraries typically want their OPAC stations to search their own branch by default. This can be done in two ways: manually and automatically.

Manual Setup

To set up an OPAC station manually, you will need to "hard-code" the URL with your library's database ID (found here: <http://pines.georgialibraries.org/sites/default/files/files/LibraryIDs.xlsx>). In your OPAC station's browser, set the URL for the home page to http://gapines.org/eg/opac/home?physical_loc=<library id>. For example, for the Bogart library, which has the id 8, the resulting URL would be http://gapines.org/eg/opac/home?physical_loc=9.

The manual approach requires that you physically set the URL at each of your libraries' OPAC stations. This is the only way for library systems behind a single public IP address to use this feature.

Automatic/Server-Side Setup

To use PINES' automatic IP redirection, you will need to supply PINES/GPLIS staff with the public IP address ranges for each library location. This will then be added to a file that lives on the PINES servers with this format:

<Library Short Name> <start ip> <end ip>

For example:

WGRL-BO 192.168.1.1 192.168.1.254

The server side file is consulted each time anyone visits <http://gapines.org>, and if their IP matches a range on our list, they will be redirected to searching that library or system.

Note

The address you provide to PINES/GPLIS staff must be your library's **public IP** address. IP addresses in the private/reserved ranges, 192.168.X.X, 172.16.X.X - 17.31.X.X, and 10.X.X.X are only valid inside your local area network and will not work for the PINES side file. Note that the WGRL-BO example, while in the correct format, would not actually work for this purpose.

4. Evergreen Permissions

Evergreen permissions setup is both very complex and poorly documented. This section is the product of reverse engineering on the part of PINES/GPLIS staff. Though we believe it is correct as far as our experience with permissions setup goes, we cannot guarantee its accuracy until we receive documentation and/or training from the Evergreen developers.

4.1. Permissions Groups

Each user is granted a permissions group, which is a globally-defined set of permissions created to allow certain types of access, when he/she is created in the system. Here are the permission groups available in PINES:

Administrator

- GlobalAdmin – Global Administrator – permissions to administer all of PINES
- LocalAdmin – Local System Administrator – permissions to administer a library system
- LibraryManager – Library Branch/Unit Administrator – permissions to administer a single library

Cataloger

- SuperCat – Global Cataloger – permissions to administer cataloging in all of PINES
- Cat1 – Local System Cataloger – permissions to administer cataloging in a library system
- Cat2 – Local Cataloger – permissions to catalog items in a library system
- Cat3 – Local Cataloger – permissions to catalog items in a library system

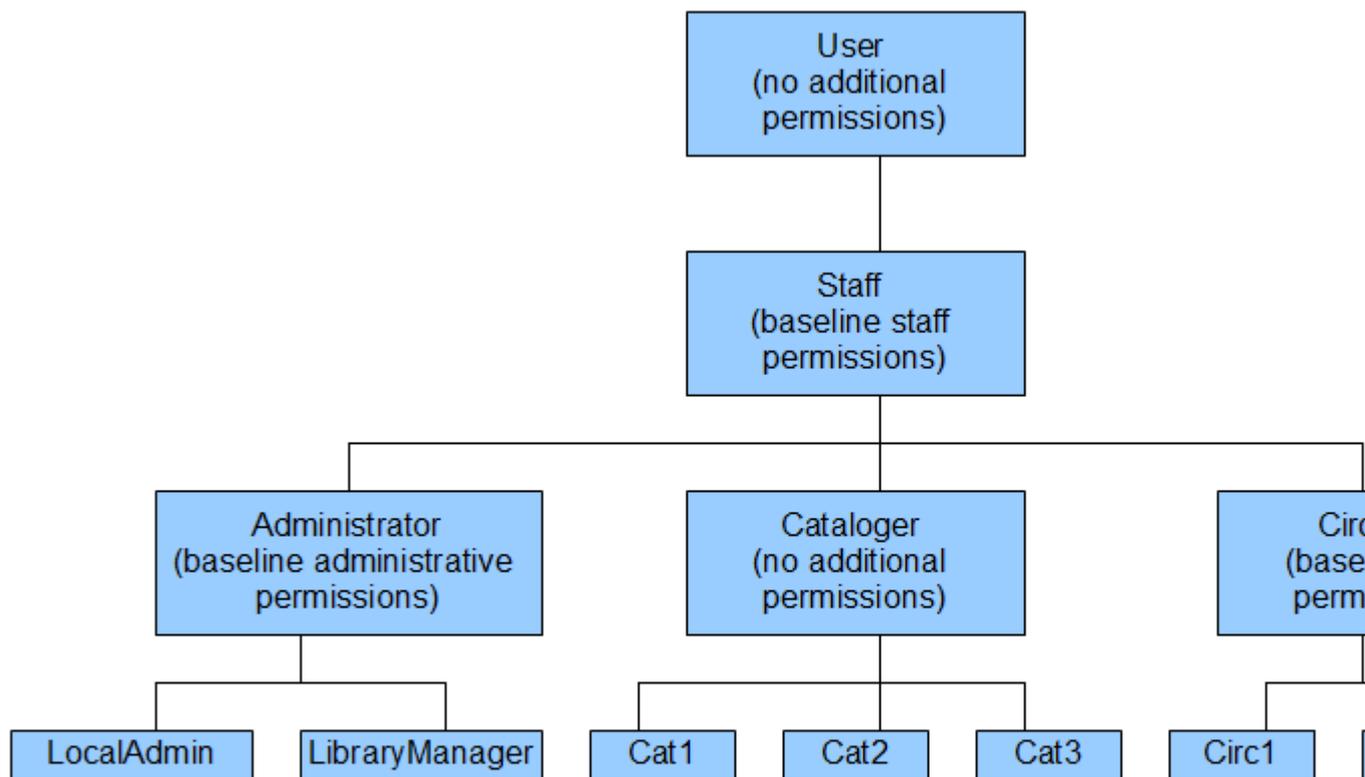
Circulator

- Circ1 – Local Circulation Administrator – permissions to manage a library's circulation functions
- Circ2 – Local Circulation Staff – permissions to perform regular circulation duties
- Circ3 – Local Circulation Staff – permissions to perform regular circulation duties
- Circ4 – Local Circulation Staff – permissions to perform regular circulation duties

There is also a StaffNoPerm group under the Patron category, which grants the staff benefit of not having to owe fines without any additional staff permissions.

4.2. Hierarchical Permissions Structure

Evergreen employs a hierarchical permissions structure in which "child" groups inherit permissions settings from "parent" groups. The basic group is "User", which contains all Evergreen users. Above the "User" level are subcategories, including "Staff," which contains a set of permissions that is inherited by all "Staff" group members. "Staff" is subdivided into "Administrator," "Cataloger," and "Circulator," and each of these levels may also contain permissions that are inherited by their subgroup members. In the case of the "Administrator" group, a base set of administrative permissions is granted to the "GlobalAdmin," "LocalAdmin," and "Library Manager" permissions groups, which are then assigned to individual users. See the diagram below for a visual representation of this structure.



Evergreen Permissions Hierarchy

Assigning a permissions group to a user grants them all of the permissions in the tree. This means that a LibraryManager assignment equates to granting all permissions in User + Staff + Administrator + LibraryManager, inclusive.

Permissions Scopes

Evergreen permissions are "scoped," meaning that "boundaries" are set to limit staff actions to a single system or branch. In PINES, there are three scopes: 1. Consortium: the permission applies to the staff member at any location in PINES. 2. System: the permission applies to any location within the library

system at which the staff member works 3. Branch: the permission applies to the individual library at which the staff member works.

4.3. Context Matters: Working Location and Workstation

As of Evergreen 1.4.0.4 (which PINES upgraded to in May 2009), Evergreen permissions rely on the user's "working location." By default this is the home library assigned to the user at the time of registration, but for users who prefer to use a different home library as a library patron, this can be manually set in the Admin → User Permission Editor interface. For staff such as LocalAdmins, who need to administer or perform work at more than one location, each relevant location must be selected.

The other context Evergreen uses is the Staff Client workstation location. This is set on the first use of a newly installed staff client. When editing library settings, the staff client location must be for the same library for which you are attempting to change settings. See the Library Settings section for more details about this. Also see the Creating Multiple Staff Client Profiles section for setting up workstations for administering multiple library locations from a single location.

Tip

If you have system-level permissions (as you do as a LocalAdmin), you only need to be assigned a single working location within your system. However, if the staff member mainly has branch-level permissions (such as a Circ1), you will need to assign her/him each location where you need permissions to be in effect.

4.4. Adding Custom Permissions

Staff users are assigned a set of permissions and for the Administrator class of users, some of those permissions are grantable. A grantable permission is one that an administrative user can grant individually to a single user. This is done in the Admin → User Permission Editor interface by entering the user's library card barcode and adding checkboxes beside the appropriate permissions. A list of permissions and their definitions is under development by PINES/GPLS staff.

Tip

Though LocalAdmins have the ability to grant permissions, PINES/GPLS staff recommends caution when doing so, as customized permissions may cause problems down the line. For example, if a staff member changes employment positions at a library, her/his permissions profile group may change, but any custom permissions will continue to be assigned unless manually removed by the LocalAdmin. It would be beneficial to keep a record of such individualized changes.

Tip

Locally-assigned permissions override permissions assigned "higher up" in the hierarchy. For example, if the Circ2 profile has VIEW_USER assigned at the Consortium scope, and you assign that same permission to a specific Circ2 at the Branch scope, that staff member will be limited to viewing/accessing user accounts at her/his branch.

Permissions assigned at the permissions profile group level are not able to be removed on a per user basis. LocalAdmins must assign a profile with fewer permissions to decrease the permissions level of a user.

5. Third-party Software Products and PINES

Many PINES libraries contract with what are termed "third-party" software vendors (because they are outside of the purview of the PINES/GPLs relationship with the PINES library system) for products that need to connect with the PINES software to work. This is governed by a PINES policy (found at <http://pines.georgialibraries.org/policy-procedure-libraries-considering-library-management-products>) which requires that libraries expecting full compatibility with PINES software must consult PINES/GPLs staff in all negotiations with vendors to ensure that their products are compatible. Assurances from other users of the product or from the third-party vendor that the product will work as expected should not be taken at face value.

In certain cases, software development is required to make the third-party's product connect correctly with PINES. In these cases, the cost of developing, supporting, and maintaining the custom interface will fall to the library purchasing the product. When contracting out for SIP-specific technology, it is responsibility of the third-party vendor to build the crosswalks necessary for compatibility with Evergreen, as it is the responsibility of the vendor when providing compatible technology for any ILS.

In order to collaborate with the PINES libraries in contracting for 3rd party technology, PINES/GPLs will provide a test environment within which the library and/or the vendor may develop and test the crosswalks necessary in order to insure compatibility with Evergreen.

Once the third-party product has been proven to work with Evergreen and for those products that are currently in use, PINES/GPLs staff is responsible for Evergreen server-side administration. Support for the third-party product continues to be the purchasing library's responsibility.

Tip

These same guidelines apply to any product or service that would require any sort of data export, either one-time or ongoing, from PINES/GPLs staff. Many catalog added content services and statistical analysis services require this. Please consult with PINES staff about these requirements before entering into an agreement.

5.1. Adding a New SIP Device

To add a new SIP device, you will need a couple of pieces of information:

1. The public IP address for the device, which PINES/GPLs staff will add to the firewall whitelist to allow access
2. An Evergreen account that will be used by the device to log in and manage Evergreen users and transactions. This will be created by PINES/GPLs staff for you.

Include as much information as you can in a Helpdesk ticket and PINES/GPLs staff will assist.

5.2. Evergreen Built-in Self-Checkout Interface

Evergreen contains a simple built-in self-checkout interface that was developed by Evergreen Indiana. It requires a dedicated PC with a monitor, mouse, scanner, and receipt printer. If this is something you think will benefit your library and would like to begin using it, please contact PINES/GPLS staff via the GPLS Helpdesk.

6. Troubleshooting the Network

6.1. Types of Problems

The lines between Evergreen issues, wide-area network (WAN) issues, local area network (LAN) issues, and individual PC workstation issues can be unclear, but it is very important in troubleshooting to attempt to find out which category your problem falls into before you can know how to handle it. Some definitions may be helpful.

- Evergreen – the open source software that runs on a Linux server cluster administered by PINES/GPLS staff and their contractors. The Evergreen Staff Client connects to and interacts with this server cluster over the local area and wide area network connections. Both Staff Client and server-level problems can be considered “Evergreen” issues.
- Wide Area Network (WAN) – your libraries' sole means of getting to the Internet. Your library system contracts individually for Internet service, so that service provider will be your sole contact for wide area network problems.
- Local Area Network (LAN) – the network internal to your library, administered by your local library system’s information technology (IT) staff.
- Individual PC Workstation – the computer on which your staff or patrons are working, administered by your local library system’s IT staff.

An example of where the confusion between these areas of responsibility comes about would be Evergreen "slowness," a common complaint. The PC workstation could be short on memory or could have too many programs running at once. Internal network bandwidth could be at capacity, causing all kinds of Internet slowness, including the staff client. There could be a network outage in one of the service areas near your library. Or finally, there could be a problem with Evergreen that is causing slowness for everyone. There are diagnostic tools available to the Local System Administrator for troubleshooting each of these trouble areas.

An easy way to check whether the PINES website is actually unavailable or if something else is the problem is to check [gapines.org](http://downforeveryoneorjustme.com/) at the site <http://downforeveryoneorjustme.com/>. You will get an instant result that will let you know whether other people on the internet are able to access the site.

6.2. Sources for Help

- Local IT Staff – The first contact for all technical problems. In libraries where there are not dedicated IT staff, this responsibility will fall to the "most technical" staff member in a system. Inter-library sharing of IT expertise is greatly encouraged.

- Internet Service Provider (ISP) – Your library system’s network provider - the point of contact for networking issues if local area network problems are ruled out.
- GPLS Helpdesk – The method to contact either PINES/GPLS staff or GPLS IT for issues within their respective areas of responsibility.
- GPLS Technology Site - (<http://galibtech.org>) – Contains information about GPLS provided services, FAQs, and best practices.
- TechTalk Mailing List – connect with Local System administrators around the state (both PINES and non-PINES libraries) and ask your technical questions. There is a great deal of expertise in our collective knowledge!
- Mailing list: <http://list.georgialibraries.org/mailman/listinfo/techtalk>