Local Admin Policies and Procedures

This is a working document that is currently being updated. Most of the Local Admin documentation is still available at [PINES Documentation](#)

Introduction

The Georgia Library PINES Program (http://pines.georgialibraries.org) is administered by the PINES staff of the Georgia Public Library Service (http://www.georgialibraries.org) (referred to as "PINES/ GPLS staff" throughout this manual) on behalf of the PINES Libraries. This role includes high-level system administration of the PINES Integrated Library System (ILS) software (http://gapines.org); Helpdesk support (http://help.georgialibraries.org) for consortium wide policy, software, and other issues; providing training and documentation regarding agreed-upon policies and procedures; and 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.

The PINES Local System Administrator

Each PINES library system is required to have a Local System Administrator 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 local PINES workstation configuration, locally-set system settings, creating and running statistical reports, and submitting tickets to the GPLS Helpdesk.

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.

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 Evergreen Project (http://evergreen-ils.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. This cluster, and its server-level software programs, is managed by PINES/GPLS staff and USG IT staff. The administration for which Local System Administrators are responsible exists in the Evergreen Staff Client.

The Evergreen Staff Client

The Evergreen Staff Client is web-based and designed to run within Firefox or Chrome. Local Admins do not need to install client software, but will be required to configure and troubleshoot issues. Configuration tasks may include registering workstations, configuring browser cookie settings, and configuring printing.

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