Creating Staff Users and Assigning Permission Profiles

Local Admins have overall responsibility for creating, updating, and maintaining all staff accounts for their system except for CatCoord, Cat1, and LocalAdmin accounts. CatCoord, Cat1 and LocalAdmin accounts may only be created and updated by PINES staff at the request of the library system's Director. CatCoord and Cat1 accounts require specialized training by the PINES Cataloging Specialist before being created.

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.

- Types of Staff Permission Groups
- Policies Regarding Staff Accounts
- Permissions Spreadsheet

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.

Hierarchical Permission 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.
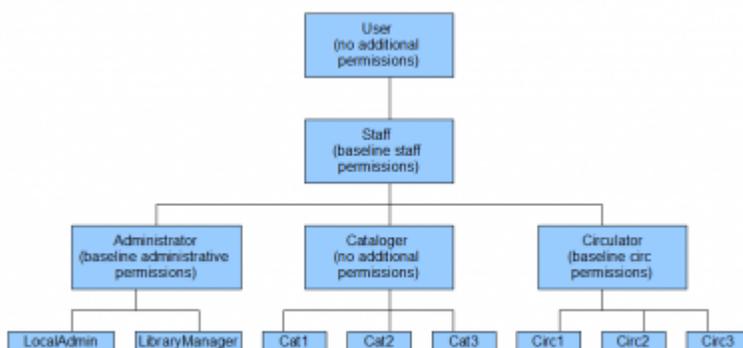
Evergreen Permissions Hierarchy

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

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 Administration > User Permission Editor interface by entering the user's library card barcode and adding checkboxes beside the appropriate permissions.

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.

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.

Context Matters: Working Location and Workstation

Working Location

Evergreen permissions rely on the user's "working location" which is set under Administration > User Permissions Editor (or, from the staff person's account page under Other > User Permissions Editor).

For staff such as LocalAdmins or Cat1s, who may need to administer or perform work at more than one location, each relevant location must be selected.

Workstation

The other context Evergreen uses is the workstation location. See Workstation Documentation for more information.

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