User Permission Groups

Each patron and staff account is assigned to a permission group (type of account) that controls what functions they can use and circulation rules may apply.

Patrons Permission Groups

- **Patron** - Normal users. Privilege is two years. This user will be blocked if a total of $10 or more is owed. User is billable [1999.05]. User may have up to 50 holds at a time. This profile can also be used for users who live out-of-state but work, attend school, or own property within Georgia.
- **Digital Only** - This permission group provides access to electronic materials (databases, ebooks, etc.) that the library provides, but does not allow checkout of physical materials. Privilege is one year. This account type may be used at the library's discretion for cards that are created for students in partnership with schools, for deployed military, for patrons who cannot come into the library and/or only wish access to digital materials, and for patrons that are experiencing homelessness. [Pilot began May 2017. Updated May 2018 2018. Updated May 2019.]
    - See also: More information about Digital Only accounts
- **Friend** – A library user who is a member of a local Friends of the Library organization. Privilege is one year. User is billable, and has same use parameters as the Patron profile.
- **GLASS** – This profile type is restricted to patrons who are already registered with GLASS and have a KLAS ID number. PINES staff can create these accounts, but most will be created and managed by AMLAS staff. GLASS users are allowed up to 50 checkouts at a time. Privilege is for two years. Standard checkout period is for 30 days with 1 renewal. Homebound users are not billed overdue fines, but will be charged for lost, damaged, or long overdue items. 15 holds are allowed at once. GLASS users may place holds on DVDs that have descriptive audio tracks and on large-print books, and these items will be routed to the AMLAS office (STATELIB-B) for packaging and shipping through the United States Postal Service’s Free Matter for the Blind program. [2014.05 and 2014.07]
    - See also: GLASS Patron Profile Instructions
- **Homebound** – Homebound users are individuals who are unable to visit a library in person without great difficulty and who either have materials delivered to them by a library’s outreach department or picked up for them by a designated representative. Cards should not be issued to users that live outside of a library’s service area. Individuals who assist the Homebound user by picking up materials from the library on behalf of the Homebound user should be listed in the account’s Alert field. Homebound users are allowed up to 50 checkouts at a time. Privilege is for two years. Standard checkout period is for 30 days with 1 renewal. Homebound users are not billed overdue fines, but will be charged for lost, damaged, or long overdue items. 15 holds are allowed at once. [2014.05]
    - Each Library System's Director shall determine which of their staff members are permitted to create user accounts with the Homebound profile.
    - Libraries may use discretion in the case of a user who is able to visit the library but may need longer than a normal check-out period to process information.
    - Each library system shall determine whether Homebound cards are kept at the library or kept by the user or user’s representative.

    - Because each library system may decide how long to keep its own items on their own holds shelf, a library system may choose to decide to keep their own items for Homebound patrons on their holds shelf for a longer period of time to better assist patrons who are unable to pick up the items quickly. Libraries should not keep items from a different library system on their holds shelf longer than the standard maximum of 7 days.
- **Institution** – A library system may choose to issue an Institution card to any institution or organization with a regular daily population that is housed long term. Examples include school media centers, day care centers, nursing homes, assisting living facilities, and jails [2014.12].
    - Each library system shall develop an application form different from the standard patron application form that enters the institution into a legal contract with the library ensuring that the institution will take responsibility for any fines and fees. The application form must be signed by an authorized representative of the institution and should be approved by the Library System Director or an authorized representative of the library system. A library system should not issue an Institution card to any institution located outside the library's service area.
        - Example Form 1
        - Example Form 2
        - Example Form 3
        - Example Form 4
        - Example Form 5
    - When entering data into the account registration form, the name of the primary representative of the institution should be entered as the name on the account. The Institution's name should be entered as the first line of the Address. Any respresentatives of the institution who are authorized to check out materials on that card should be listed in the account's Alert field.
    - Privilege limit is 1 year. This user will be blocked if a total of $10 or more is owed. User is not billed overdue charges, but is billed for Lost, Damaged, and Long Overdue items. User may have up to 50 items checked out at a time. User may have up to 50 holds at a time. Circulation period is 42 days with no renewals [2015.05]. Note: The 42-day circulation period was implemented 5/4/2015. Items checked out prior to this have a 30-day circulation period.
    - Library systems may choose to store an Institution's physical card at the library.
- **NonResident** – A library user who resides in the state of Georgia, but outside of the areas served by PINES libraries. Privilege is one year. This user will be blocked if a total of $10 or more is owed. User is billable. User may have up to 50 holds at a time.
- **OutOfState** – A library user who resides out-of-state. Privilege fee is $25. Privilege limit is 1 year. This user will be blocked if a total of $10 or more is owed. User is billable. User may have up to 50 holds at a time.
- **PaymentPlan** – Temporary status for individuals making payments on fees that would otherwise automatically go to collections. A library system can notify the collection agency not to pull patrons with this profile. The profile should be returned to a permanent status after full payment of the fee. User has identical privileges to Patron profile [2008.11].
- **Restricted** – A library user with restricted library use. Privilege limit is 1 year. This user may have only 2 items checked out simultaneously. This user will be blocked after 1 overdue item and if a total of $0.01 is owed. User is billable. User may have up to 5 simultaneous holds.



Restricted cards are intended for temporary or probationary purposes. This may include seasonal workers, RV park residents, the homeless or in lieu of fully barring a patron from

library use.



PINES should accept as proof of residency, a letter on official letterhead from agencies serving the homeless, temporary group homes (such as family violence shelters), and similar institutions.

- **StaffNoPerm** – A library user who has staff member privileges on borrowing items, but does not have staff-level permissions [2009.05].
- **Student Card (Pilot)** - *For use only by Live Oak Public Library System (LOPL) during pilot period. LOPL is working with Heard Elementary faculty to gather library card applications from parents/guardians.* Student cards are limited to two checkouts at a time and to two holds at a time. Users are not charged overdue fines, but can be billed for lost, long overdue, and damaged materials as normal. Parents/guardians are responsible for these fines. LOPL will be responsible for lost or damaged materials and long-overdue fines not recovered by other libraries for their materials. The account expires after one year. [Pilot approved 2018.12, became available 2019.02.]
- **Temp** – A library user who resides in the area for a limited period of time, but lives permanently outside of the state. Privilege limit is 6 months. Privilege fee will be ½ ($12.50) of the fee charged for OutOfState users. This card carries limited borrowing privileges. This user may check out up to 5 items simultaneously. This user will be blocked after 1 overdue item and if a total of $0.01 is owed. User is billable. User may have up to 5 simultaneous holds.
- **TempRes6** – A library user 18 years of age or older. User has identical privileges to Patron profile, except that privilege expires after 6 months, and card must be renewed at that interval. This profile may be used for college students or military personnel who move frequently. There is no fee to receive this card.
- **TempRes12** – A library user 18 years of age or older. User has identical privileges to Patron profile, except that privilege expires after 12 months, and card must be renewed at that interval. This profile may be used for college students or military personnel who move frequently. There is no fee to receive this card.
- **Trustee** – A library user who is a member of a Library's Board of Trustees. Privilege is 2 years. User is not billable. Same use parameters as Patron profile.

Staff Permission Groups

Each staff member should generally be given the lowest level permission group which allows them to manage their responsibilities. Additional permissions may be granted to an individual to increase their access without moving them to a higher permission group (for example, a CIRC1 may also be granted the ability to create and run reports), but specific permissions cannot be removed from an individual without moving them to a lower permission group.

The Director of each library system must designate a Cat1 and a LocalAdmin. Those accounts can only be set up and updated by PINES staff. The LocalAdmin will manage the rest of that library system's accounts.

- Chart of Staff Permissions



All staff accounts must have at least one Working Location set or some features of the staff client will not work properly. Working locations are set under Administration > User Permission Editor or from within the account at Other > User Permission Editor.

- **Acquisitions**
  - ACQUADMIN, ACQFIN, ACQLIST, ACQREC, ACQSEL - Permissions are assigned and explained by PINES staff during Acquisitions training
- **Cataloging**
  - CatCoord - *Coming in 2019*
  - Cat1 - Library staff must be trained by PINES staff prior to being given Cat1 permission, and each library system must have a designated Cat1 who is responsible for overseeing all of that library system's cataloging functions. Cat1 accounts can only be updated by PINES staff at the request of the library system's Director.
  - Cat2, Cat3 - Other technical services staff whose permissions are managed by a library system's Cat1.
- **Circulation**
  - LibraryManager - Each library system designates LibraryManagers (usually branch managers or circulation department managers) who have all circulation-related permissions. These accounts are managed by a library system's LocalAdmin.
  - Circ1, Circ2, Circ3, Circ4 - Varying levels of circulation staff. These accounts are managed by a library system's LocalAdmin.
- **LocalAdmin**
  - Each library system designates a LocalAdmin (usually the library system's technical lead / system's administrator).

Permission Groups No Longer In Use

- **Class** - This is no longer used in PINES [2003.02].
- **Homeschool** – The Executive Committee rejected the creation of a new Homeschool profile with additional permissions beyond that of a standard Patron profile [2014.05]. Homeschool students should be assigned the standard Patron profile.
- **Outreach** – This is no longer used in PINES [2014.12].

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