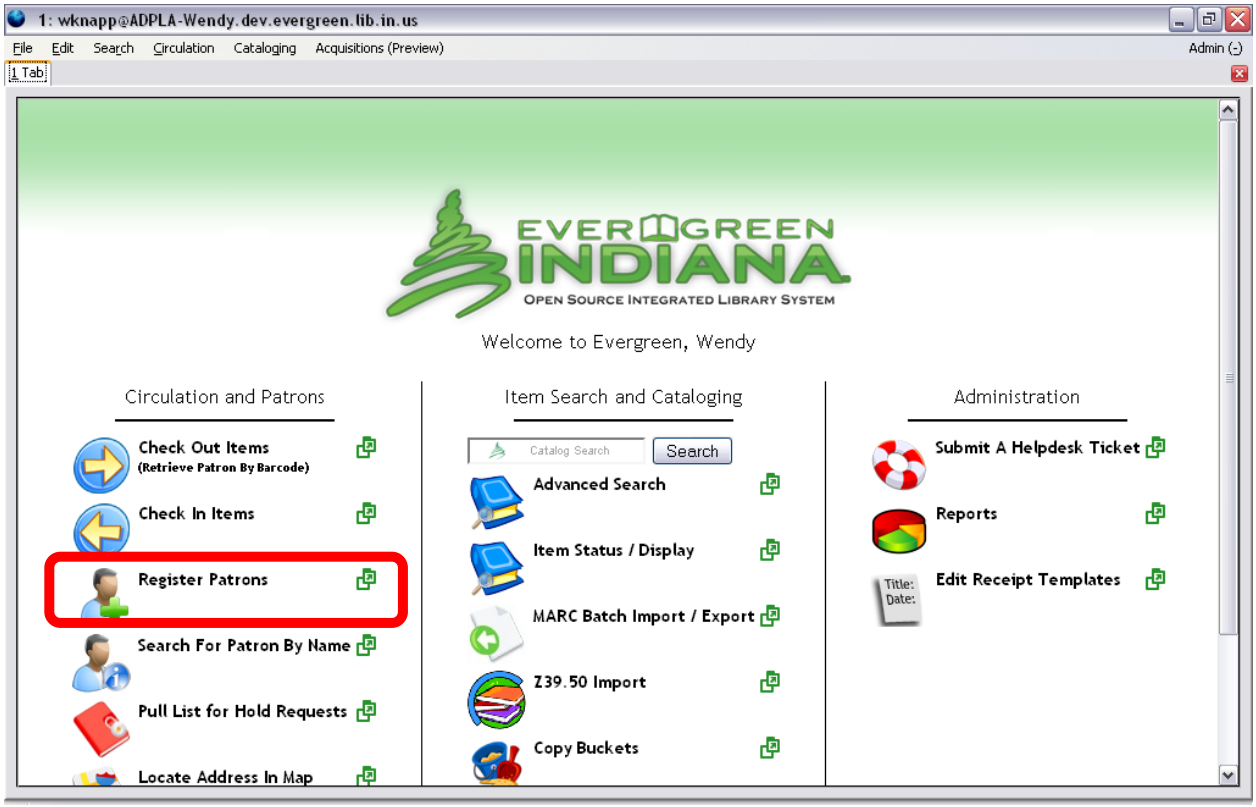
Creating Staff Logins

In this example, we will create a Cat1 login. Note that this staff account is slightly different from other staff accounts. Because the Cat1 level is only granted upon completion of Advanced Cataloging in Evergreen Training, there is one additional step for the Cat1 login.

To create Staff logins, your local admin will simply "Register" a new patron.



The first part of the barcode will be the library's Evergreen Indiana library abbreviation. For a complete list, see the document, "Member Library Abbreviations for Intra-Evergreen Indiana Library Lending" on the "Evergreen Indiana Resources for Member Libraries" web page (http://www.in.gov/library/3379.htm).

For the Indiana State Library, the abbreviation is isl.

The second part of the barcode will be appropriate Staff Profile Group:

librarymanager	circ1
cat1*	circ2
cat2	circ3
cat3	circ4

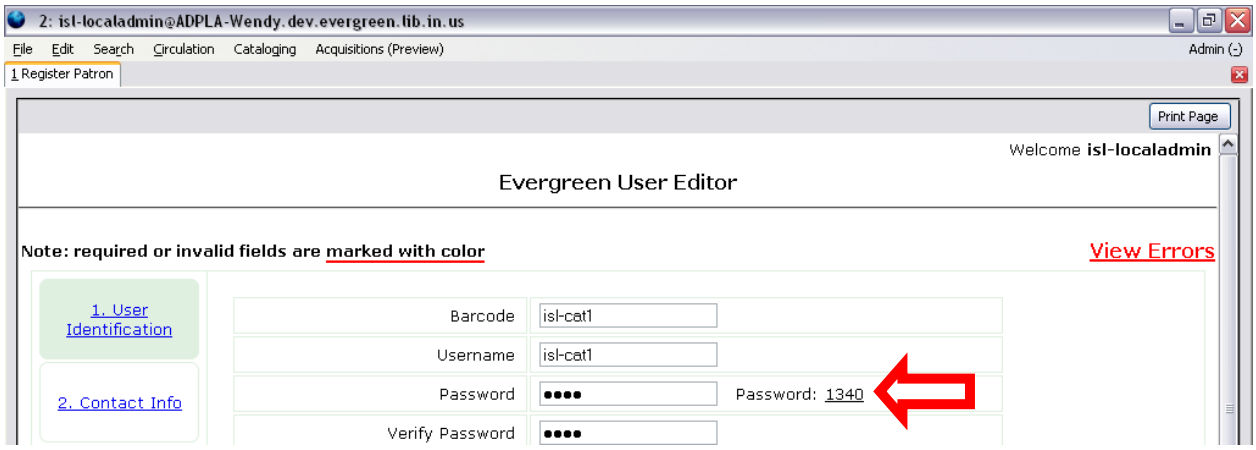
*NOTE: cat1 is not an option in the Profile group. You should create the username/barcode with "cat1," but you will have to submit a helpdesk ticket to turn on the appropriate permissions.

The first and second part should be connected with a hyphen.

So, for our example of a Cat1 for the Indiana State Library, our username (and barcode) will be:

isl-cat1

MAKE A NOTE OF THE PASSWORD!!!!



In the" first name" field, enter the name of your library. In the "last name" field, spell out the staff profile group. Evergreen doesn't allow numbers in the "last name field.")

librarymanager = LibraryManager

cat1* = CatOne

cat2 = CatTwo

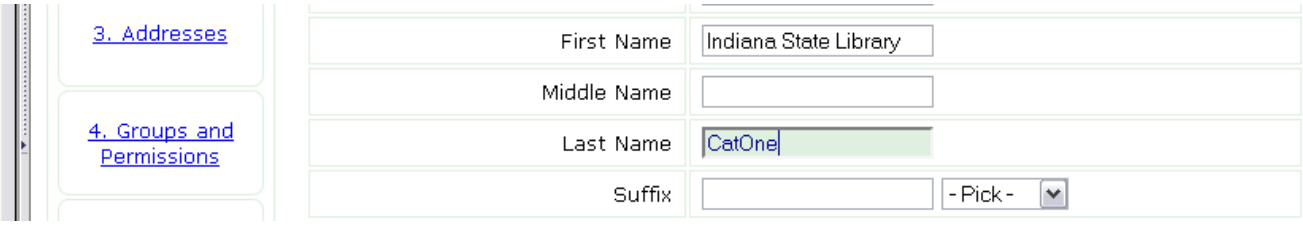
cat3 = CatThree

circ1 = CircOne

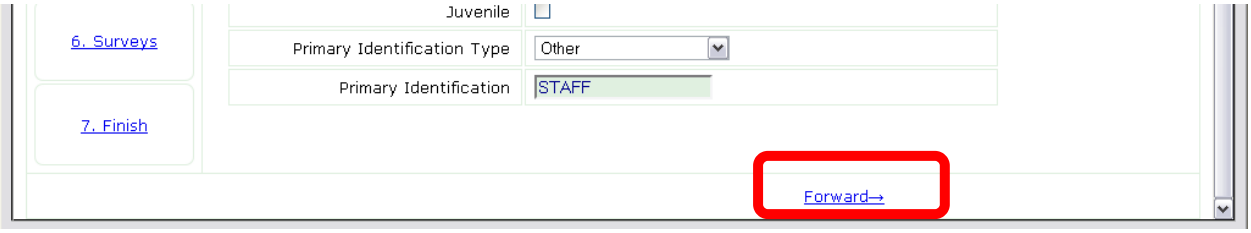
circ2 = CircTwo

circ3 = CircThree

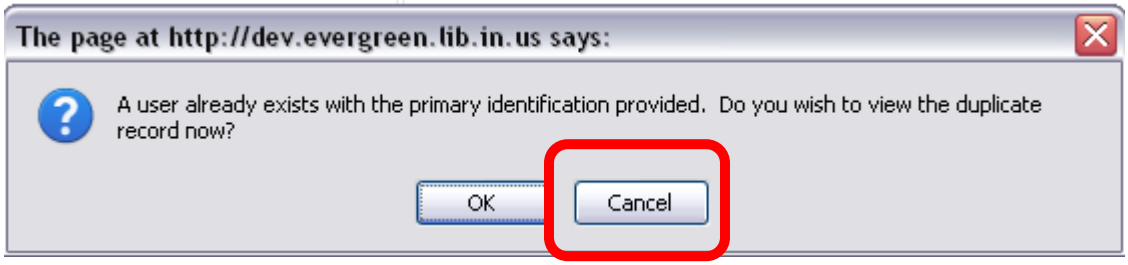
circ4 = CircFour



For Staff Logins ONLY, no Primary Identification is required, so you'll choose the Primary Identification type of "other," and the Primary Identification will be (in all caps) STAFF. Click "Forward→"

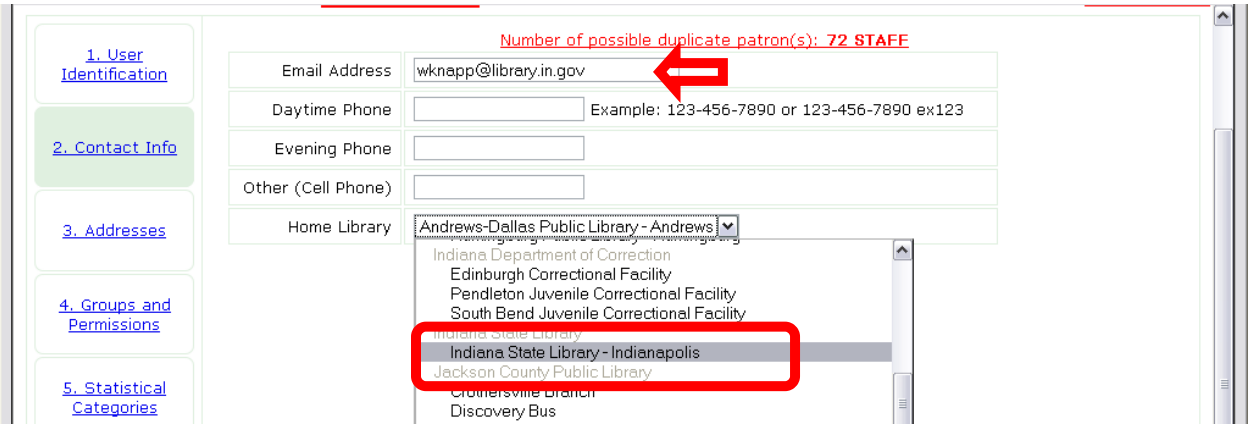


You will get the message that the Primary Identification, "STAFF" already exists, just click, "CANCEL."

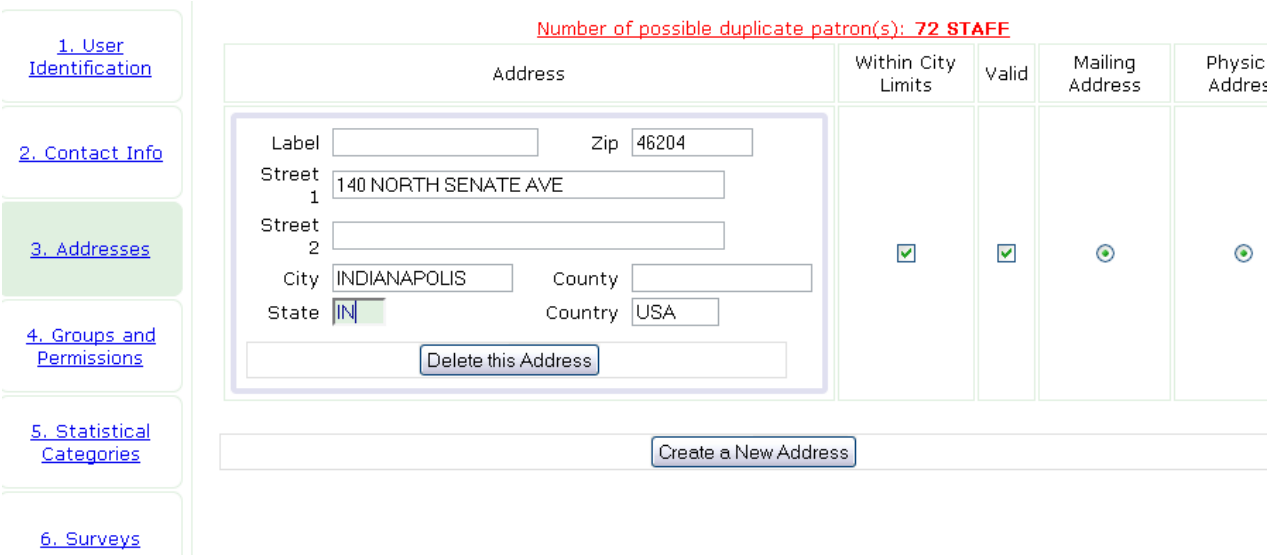


Enter a staff email address for one of the staff members who will be assigned to this login.

And be sure to choose your library at the "branch" level.



Enter the library's address (in all caps) and click Forward→.



Choose the Appropriate Profile Group.

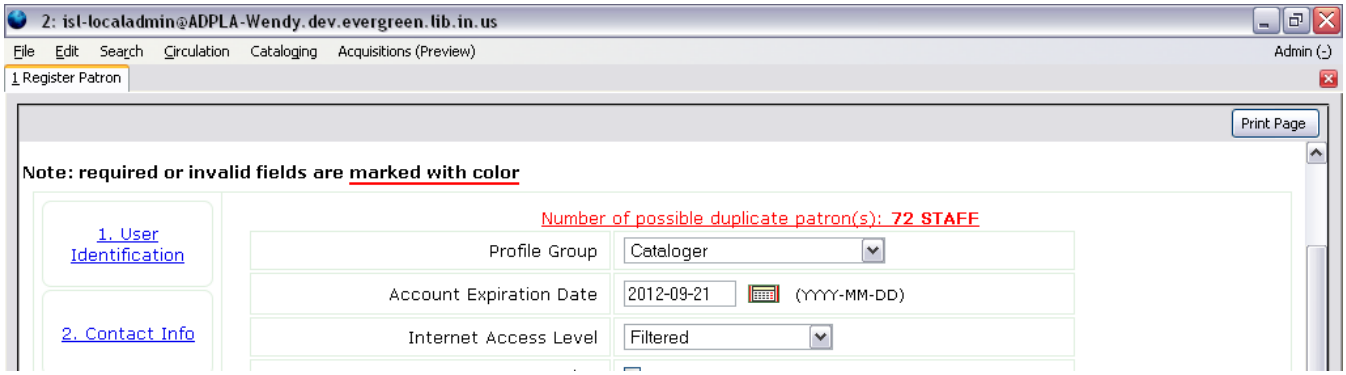
NOTE: You will have to scroll to see the Staff Profiles.

In our example, we cannot choose the Profile Group Cat1, because that permission is assigned by submitting a helpdesk ticket with proof of completion of Advanced Cataloging Training. We will choose "Cataloger" instead, and submit the helpdesk ticket.

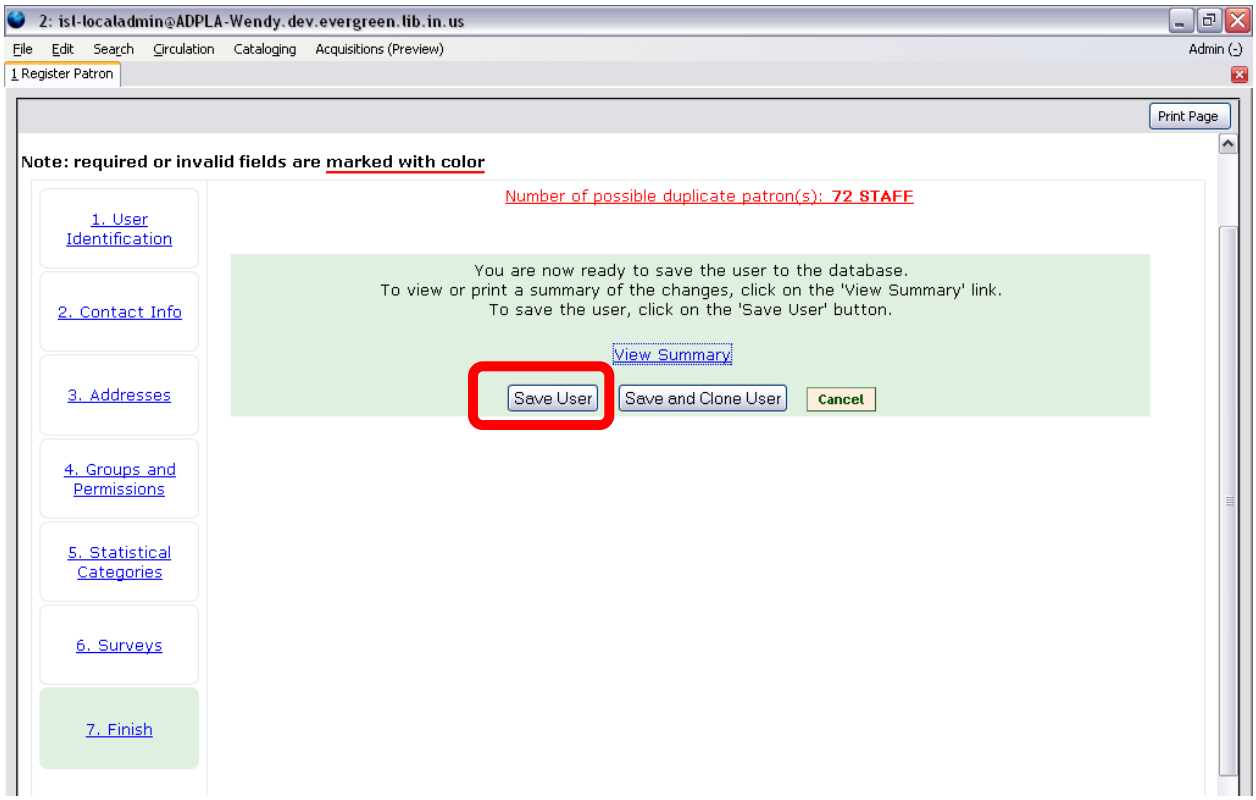
NOTE: The Staff Profile Groups "Administrator" "Cataloger" and "Circulator" have no profiles set up, they are merely place holders. You must choose from one of the following profile groups:

librarymanager	cat2	circ1	circ3
	cat3	circ2	circ4

The expiration date will populate itself:



Skip ahead to Step 7 and Save the user:

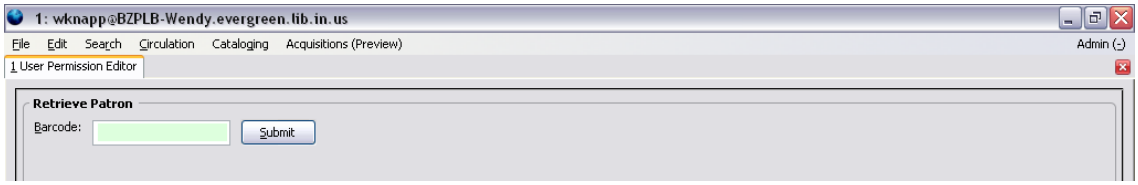


For staff logins that are not Cat1, you are done. If you are creating a Cat1, go back to the splash page by closing the window above.

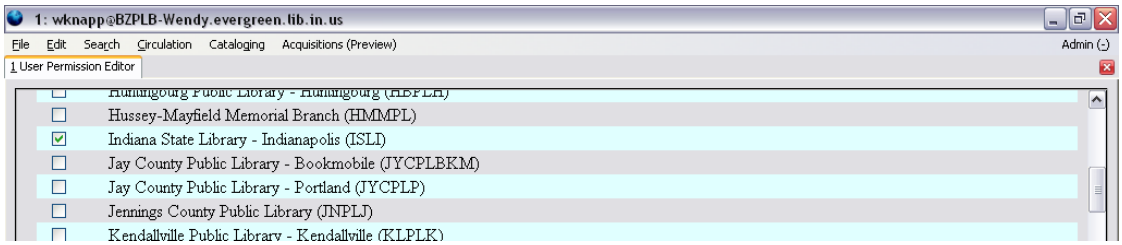
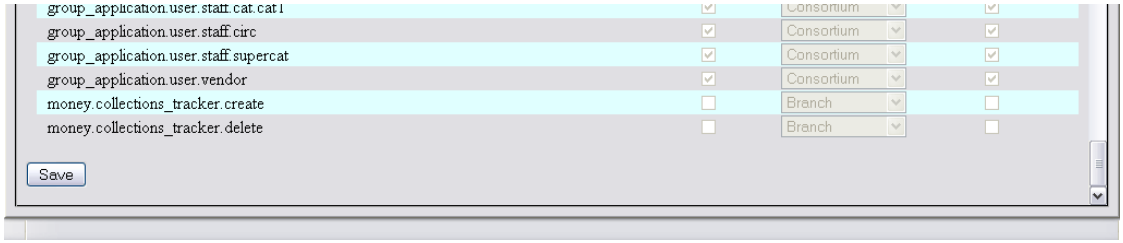
Include in the helpdesk ticket, your name, your library, the barcode you just created (in our example isl-cat1), the name of the cataloger, and the date of the Advanced Cataloging training s/he attended.

Once the staff account has been created, assign it to the library as a work organization unit. This can be done from the User Permissions Editor.

Enter the username of the staff member's account in the "Barcode:" box.



Select the library from the list:



Scroll all the way to the bottom of the page (past all the permissions) and click Save.