EVERGREEN 2020 ONLINE CONFERENCE

WEDNESDAY TRACK 2: RETHINKING PATRON AND STAFF PERMISSION GROUPS

IN NC CARDINAL

JUNE 10, 2020

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>> Welcome, everybody, to Rethinking Patron and Staff Permission Groups in NC Cardinal. My name is Amy Terlaga. I am hosting this session. I am with Bibliomation. Bibliomation is sponsoring this session. Closed captioning is being sponsored by Equinox Open Library Initiative. We'd like to thank our captioner. This is session is in meeting mode, not webinar mode. So please leave your video off and your mic off and use chat when asking a question or commenting.. I'm very pleased to introduce Benjamin Murphy and April Durrence from NC Cardinal. I will turn this over to them.

>> All right. Thank you. So as Amy said, the topic for our presentation is Rethinking Patron and Staff Permission Groups in NC Cardinal. A little about who we are April Durrence is our NC Cardinal training specialist. She will talk about our staff project. My name is Benjamin Murphy. I am NC Cardinal program manager, and I will be talking to you about our project. Proper soy bit of background. NC Cardinal is a statewide consortium of public libraries using a shared instance of Evergreen. We began in 2011 and are now serving about half the public library systems in North Carolina. We have an average about four new Libra systems each year. In the early years we were focused on bringing in new libraries and reaching a critical mass.

As we grew, so did the number and variety of Patron types, circ mods, et cetera. When we started in 2013, it emphasized the impetus of emphasizing standards and consistency of consistency between my respect we start off with consolidation projects to connect things like our circ mods. Last year we took on Patron and Staff Permissions.

So I'm going to tell you about our process for cleaning up permissions and April will talk about staff.

Where we started with Patron Permissions, we have some permission groups like limited -- limited to minute, Teen Juv, Limited new user, Young Adult, Teen must school, and about six other types of children's accounts. We also had some super specific commission depression groups like -- so when creating a new user, these were not displayed in a logical order as shown in the screenshot here. Individual library systems had different

policies about which groups they used and didn't have circ policies written for all of those various groups. So if a staff member assigned a permission group for which that library system didn't have a certain policy defined, they might see unexpected behavior as the transaction hit.

The same thing might happen if they view user visited a nearby library system that didn't use the same permission groups. So if your library was using teen limited and a LimitedYA user from a neighboring County that is your library, they might not have the limited behavior that you would expect. Soy little bit about our process partly for thing we wanted to do is understand which permission groups were being used for circulation hold policies and how many used orders were in those groups. Then we wanted to understand the functionality that are likely systems were trying to accommodate.

Then we wanted to report back to each library what everyone else in the consortium was doing. Then we wanted to propose a new set of certified permission groups that library systems not could work with those new permission groups. And address all the different outlying use cases we came across. Finally, want to reach consensus on the permission group we would be using and promote the changes.

So one of the complications with consolidating permission groups is that you have to account for the various circulation and hold policies that refer to the various permission groups. So one of our first steps was to look at the number of users in each group and then see which systems had rules that referenced those permission groups. This chart shows which systems had circulation or hold rules referencing is specific permission group and how many users for that system were in those permission groups.

Circ or hold policies that referenced the more generic user or Patron permission groups would not be impacted by the changes we were making to the more specific permission groups. In this image each of the colored cells in this chart had a corresponding circulation or hold that had to be

altered if we changed the permission group references. Uncolored cells with a number in it were covered by the more generic rule.

One of the things you will also notice is instances where there were only one or two users assigned to a permission group. Generally this group -- this was due to the confusion caused by the chaotic drop-down list, meaning a staff to assign a permission group to the system's policy.

So once we had a sense of where things were, we created a survey for member levers that focused on the functionality of the various permission groups. These were some of the questions that we asked. Rather than focusing on what groups were presently in use, we wanted to know how do libraries need those groups to function? How are limited accounts limited that different from normal accounts? Are juvenile teen accounts functioning different from adult accounts?

Once we had the survey responses from our users, we created customized reports for each library system showing responses compared to the response of the rest of the consortium libraries. This helps us to understand other recent their responses were like the rest of the peers. As we work through the responses, we started to hone the list of simple five permission group send commute it with individual library systems to understand the outlying scenarios and how we might be able to accommodate those needs. This is an example of the feedback we gave you systems with the survey responses showing what the proposed changes were for the permission groups. And how the functionality they needed could be provided by the new permission groups.

Also, we included what questions we wanted to hold votes on at our annual meeting discussion. You concealed on the right hand side.

So in these reports, we included information about all of the circulation and hold policies that each library had that didn't reference user or Patron. We indicated which policies referred to permission groups that we were proposing changes for, and how we proposed that rule could be adapted. In this example, you can see the permission group in the first column that was

being changed, and the second to last, shows the permission group those users were to be moved too. This often took a bit of back and forth to understand the needs of the system at what the reasonable adaptation would be.

All of these reports were generated using mail merge and sent as PDF attachments.

So once we had all the reports together, we sent them out a month ahead of our annual meeting so people had time to digest them. At our annual meeting, we talked about the changes, gave people a chance to discuss them and voted to this gave us our marching orders to government the changes.

So there were a few things of interest that we encountered when implementing the changes. We had not made much use of Evergreen's ability to defense relational rules according to a user's age. For instance, where we had no fines for seniors, we set up new adult rules for users that were age 18 to 59 with normal policies, and an additional set of adult rules with no fines for users age 60-105. In general this seemed to work pretty well.

For some policies, we incremented patient stat cats that hadn't been used before to allow systems to track group circulations where unique circulation rules weren't needed. Examples of this included groups like military and college.

For generic account like general, we migrated users to more specific categories according to their date of birth.

So outcomes. We went from 35 permission groups down to 12. On the left you can see the list of permission gives we ended up with. Once all the decisions were made, the new permission groups were added or edited, then the circulation and hold rules were updated. And then we asked Mobius to update the one my and plus accounts with the new permission groups they had been assigned. This update query took about 7 minutes 30 seconds and affected about half of our users.

We ended up with a simpler list of permission groups, and cleaner and more consistent policies.

I want to say special thanks for the team at Mobius for helping us implement this, and for Johnnie Pippin who did most of the work to find solutions for our clients for these changes. And with that, I will turn it over to April Durrence.

>> All right. And I'm going to share my screen.

So for Staff Permissions, the thing and process began that in 2014-2015 as part of a larger project to expand our cataloging best practices and addressed -- address what were perceived as problems within the consortium catalog such as duplicate were brief the live graphic records, when love risk my credit into consortium, the variability of catalog styles across the consortium. Sort of like what everyone was talking about in the last session.

And -- written by poor quality vendor records, et cetera.

One of the elements of the project would be to require staff to pass some sort of assessment in order to be certified to cataloging the NC Cardinal consortium. This is a big change that generally generated a good deal of discussion and trepidation among staff and directors alike. But the membership agreed that we should undertake the project in our annual meeting in the summer of 2015.

It was a long process to expand best practices, develop training and assessment questions in 2016 and 2017, then present in person training sessions in the spring and fall of 2018. We commute getting frequent and complete we to alleviate concerns. Part of the final part of the overall cataloging training and assessment project was to make changes to ensure that only those who had passed assessments were granted cataloging permissions.

We started look when we started, cataloging another permissions were ascribed widely and repeated across many groups. Tackling this part of the

project also gives a chance to evaluate our overall allocation of permissions and the structure of staff permission groups.

We had noted over the years there were problem areas such as staff sometimes assigning staff permission groups to patient accounts in error. We also found that any staff member could create an account and assigned to their admin. The most powerful permission group that should only be used by the -- team. So bad idea.

And over the years, some permissions have been granted to various staff accounts on an individual ad hoc basis, which made it difficult to track who could actually do what, since the permission group assigned didn't tell the whole story. So this was an opportunity to address these issues and provide database security all at once.

Starting at the beginning of the larger cataloging project, we really had to conceptualize what the Staff Permissions revamp would look like. How can we better utilize the features and Evergreen? What did we need to look out for? How can we control who could create staff accounts and therefore access to patient data? So it started with research. A such time but for any documentation, whatever I could find that referenced permissions. Looking through the -- manual, documentation I talked all of the permissions with brief descriptions and the presentation for the from the 2012 seminar in Indiana. We are trying to find a methodology to create a test and rollout key features incrementally across our databases. I started experimenting on what we call the next database, which we must the use for projects. Staff don't usually use it unless were in the middle of an upgrade picked so is free to totally restructure permission groups, reallocate permissions. Another critical element that we needed was to be into lockdown access to certain permission groups. So the next database I was able to play and figure out how to do that within the next database.

What we were able to expand testing to include all library staff, we loaded the information onto the data base most staff are used to using. This is for they wanted safe place to do some testing.

One of the key components for the larger cataloging training assessment project was to alleviate staff concerns about being evaluated or judged. We needed to continually communicate and – Staff and Director so we talked about the changes in the way it would address frustrations with the catalog. So once we do that research and testing, we had to really explain to library staff because there was a lot of concern around the assessment process. And changing how staff work with the patient is a big deal. So this is something we really had to present and discuss over and over again.

>> The changes we were making would really take it vantage of the inheritance structure that Evergreen has that we were not utilizing at the time. So as you can see in our legacy structure, there were permission groups that were sort of extraneous and didn't perform any real function. And we didn't have much in the way of inheritance. So there was a commencement of improvement that we could make.

This was the structuring we were going for. On the right are descriptive some of the functions that staff can perform at each progressive group level. The circular and hierarchy means that includes the circular from support having additional permissions. System admin inherits all of the permissions. So with the most powerful the circular and hierarchy. And only assigned to directors and system login admitted -- administered his pitch we change it from the system local administrator, because without having system in two permission groups could cause confusion. We wanted to clearly indicate which was the more elevated permission group.

This is our cataloging hierarchy which we had to break off from circle like -- circular so catalogers can perform the basic circulation functions that are cataloging permissions were isolated to two permission groups. We did you know make the acquisitions permission groups because there was significant frontal overlap and a lot of the permission group to be based on the job of the staff member, not on the Evergreen module. This allows libraries the maximum taxability to use any part of acquisitions that is useful to them without any change to assignments.

One of the important features that we needed to implement were policy-based changes. It's important for an organization to let members know how changes will apply to them and how any consequent is will be applied equitably. The government's board first staff -- the staff login accounts in person policies which established the system login access managers, administrators and catalogers -- for her response offer creating new staff accounts when staff are hired or change positions as well as inactivating accounts when staff leave the library.

The policy also established which permission groups can be assigned to generic accounts and which can only be applied to individually assigned accounts. Such as administrators and catalogers permission groups.

Once we were further along the cataloging training and assessment project, Benjamin and I worked with the cataloging committee on the final draft to present to the government committee to help define the cataloging policy. In fact, I reviewed several cataloging policies created by other Evergreen consortia to develop the first draft. This was another crucial step for the full implementation because we know we need to make sure that everyone knew what the new catalog permissions groups could and couldn't do, or temporary assignment to a catalog permission group will entail, in terms of the deadline to pass the necessary assessments, and what the consequent is would be if the lever system didn't have catalogers who past assessments within the time allotted.

There are links here on this letter you are welcome to take a look at these policies.

When it came down to the nitty-gritty of reallocating permissions, we did run into a few challenges. The mysterious everything permission group was assigned to system admin and local system Branch Admin prior to our project. Because we can determine which permissions were included with everything, and for the cataloging permissions were included, we decided to limit the permission to the global admin permission group. We found a brief or sometimes similar description for some permissions challenging. So the

difference between copy needed for hold.override and renew hold override are not entirely clear. We also found some percent permissions that were not assigned to anyone. Most likely because they were part of the everything set of permissions. But we wanted to assign them to at least the global admin account just in case.

One of the key features that I mentioned was our intention to markdown which permission group could be assigned to which accounts. Finding the mechanism to restrict permissions to staff had passed assessments was crucial to the successful dock success of the overall project using evergreens group effort permissions within the editing permission field and the group configuration tab allowed us to do exactly what we needed to. There are multiple options for applying a specific group application permission to the group configuration permission field, which can see highlighted in yellow here.

Specific group application to a particular group means that staff signed up on the stuff assigned to that group revocation permission can edit the associate permission group or assign it to a user account. This might sound a little confusing, but if you look at the slide, you concede that the permission for the item cataloging permission group is group application.user.staff.admin.global_admin. When we applied the group application permission to the ending permission for system admin, it meant only global admins, which would be the NC Cardinal team could assign those permission groups.

So global admins see the full list of Evergreen staff permission groups in the Patron registration screen, and they are the only users who can assign any and all of these permission groups in the system admin cap.

If we look at the Branch Admin example on the screen, the ending permission applied is group score application.user.staff which has been assigned to the system admin permission group. This means that system admins are the only ones who can assign any account without editing permission.

So system admins policy and can assign volunteer, Circulator, Circ Lead, and Branch Admin in the Patron registration screen. And that means staff accounts. They can assign Patron accounts as well.

Other staff initiatives can only assign Patron permission groups because they were only assigned the group_applications.user.Patron permission. Which is applied on editing permission for all patient accounts.

So most staff other than -- no staff other than system admins will see any staff permission groups for only Patron permission groups are in the list they see on the pay demonstration screen.

So not only could we lock down the cataloging permission groups, we could also ensure that only directors and the designated people could be assigned to the system admin permission group and that was the only permission group which could in turn create any staff accounts at all. Other staff can no longer assigned themselves to hire permission groups or accidentally assign staff permission groups to patrons. Creating a more secure patient database.

So we had to figure out the steps we needed to take to get us to the final implementation stage. How can we transition with staff downtime? We didn't want to have to go off-line for this process, yet we were completely rebilling the way our staff would access Evergreen. We also wanted to rename a -- existence that permission gives to preserve any coded behavior that might exist behind the scenes in Evergreen.

We also wanted to communicate frequently and clearly with the entire consortium to make sure that everyone understood the intentions and actions that we will be taking and also find a gentle way to encourage and track staff compliance with some of the necessary interim steps such as creating access managers for each system. Those new to set up the vigil staff accounts for staff who were going to be performing administrative and cataloging functions before we could reassign permission groups. So we sent regular updates and reminders and provided multiple mechanisms for questions and feedback from the directors, SLAMs and staff.

When we were ready to run testing, we were able to try out the implementation process by rolling everything from the next database to the regular database with the ramp-up scheduled for early August of 2019, had several meetings in June and July. Once we deep into testing in the database, we want the system logins to be the conduit for staff feedback. Any problems, cushions, or challenges since they are known and leased -- to the seven library system, but also they are heavily invested in getting things right because the we were going to hear about it if something didn't work in the production database.

So we are testing editor -- encouraging staff to test. This was another element critical to the success of the project.

In early August we presented an update to directors at our annual meeting. Made several announcements at our listservs, and thanks to Benjamin's expertise with mail merge, we were able to send an email to each individual staff member to let them know what permissions would be assigned to their individual login access account. We wanted to be sure that staff were fully informed. We also need to be sure that we communicated with Mobius to get all of our steps coordinated. Pappas on August 5 after libraries close, we lock down all staff accounts on nobody could make any changes to staff accounts on April 6. Which was a regular workday for staff.

During that day, Benjamin transcript and we checked through all staff accounts to populate and sort a brand-new spreadsheet. Making sure we had the correct assignments for all existing staff accounts.

The evening of August 6 after libraries closed, Mobius copied the permissions list from dev to production. The Evergreen staff production gives and reallocated permission groups to staff accounts.

For reallocating permission groups to staff account, there was a certain order that we wanted to follow. First, any individual permissions that may have been assigned to staff accounts are granted years ago by other users had to be stripped out. We would no longer allow ad hoc permissions.

Any secondary permission groups also had to be stripped out. So then all the primary permission group assignments were based on whether staff had cataloging permissions or not. If they did, the primary account with the catalog permission group.

Now, the inherited Circulator permission, some cataloguers might lead need higher level permissions. Like Circ Lead or Branch Admin. That could be a second permission group.

And some of the catalogers were also system admins. So based on the structure, catalogers were the only staff might need but the primary and secondary permission group. All other staff only needed a primary circulation permission group assigned.

As you can see, this is just a little snippet of the very long and detailed spreadsheet we used. It lists everyone by name with their account ID, which primary and secondary permission groups they had been assigned to before the change, and which ones they should have afterwards. All color-coded.

So this was our final set of staff permission groups with a clean inheritance structure that resolved all of the issues that we wanted to address.

In a mechanical sense, we are able to transition away from this repetitive representation of permissions thanks to the title holds permissions was designed assigned five times a different permission groups. The green boxes here represent assigned at the consortium level, yellow system, purple is branch level. So we went from this to this. Our final permission allocation. Which is much cleaner and easier to see who has what permission.

Realizing inheritance structure, most permissions only had to be assigned once. You're welcome to click on the link to see the full spreadsheet.

After the new structure and permissions had been added to production, there were many questions. And I spent a few days troubleshooting via phone calls, e-mails, and base camp with the system logins. Checking to see whether permission or permission group was assigned correctly. We had very little that pop up.

We did end up making some adjustments to keep permissions up and down the hierarchy based on consensus of SLAMs. There were a few hiccups with our -- so we had to decide what level consortium or system, several spurts permissions should be assigned.

Mostly the reminder gaps in communication or understanding of the changes while most changes were working as agree and client, some staff had not known about or realized all of the ramifications of some of those changes. So there were a few challenges with that.

And we found there were a few bugs that interfered with some of our intentions forgiving when we discovered that a permission check is not performed before staff add a new item of value. So the -- volume. So though a staff was assigned to a permission group that did not have the create permissions to do so, we were able to create new volumes and other records. This bug is still outstanding, so please feel free to put some heat on it if you think that is something that needs to be fixed.

Your other links to other permission bugs that you may encounter.

We assigned or reassigned 592 permissions and removed close to 500 to people. A total of 589 staff accounts had their accounts edited. The improved transparency of permissions assignments has allowed libraries to decide how to assign Circulator and Circ Lead to their stat look staff. Other libraries tend to use circular foremost front lines definitely designate certain staff to have Circ Lead. While smaller libraries tend to have all staff use Circ Lead, because they cover a wider set of duties with not as much overlap. These are some of the things we are doing are working on is a consortium. Our newest -- is currently working on the means to automatically flag the graphic records on items that need to review and notify the appropriate catalogers. We based this actually on some work that Mobius had done, so we really appreciate those efforts. I am particular you cited to be that see this come to fruition as all these cataloging improvements should increase the success of ongoing deduplications and the quality of results page patients get when performing cataloging searches.

For the community, we hope to improve documentation of permissions, outstanding prescriptions doctors some strips, based on what we know now and discover in the future, and we want to see a committee care permissions at some point in the future so to know more about how each permission operates in the code and make sure that appropriate permission checks are occurring as we expected.

And just to wrap up, I want to say thank you to all the system login members and staff at NC Cardinal who did work on this project and a big thanks to Blake at Mobius to get all this in place and to answer questions. I had many questions. And of course Benjamin and the cataloging community. This is a huge effort with a huge number of people chiming in helping and making all the parts work.

Any questions?

>> Happy to answer any questions that you guys have. We did have one question about the system admin and that was, or any thoughts or questions? Book clubs. So what do you recommend members do for book clubs? We were considering making a new permission group for that. I'm not sure what the dock on that would be. April, any thoughts on that?

>> We did grant the ability to place multiple holds, so I'm not sure what the use case would be for a specific permission group. Do you have more on that? Lindsay, the testing for specific permissions, I mean it was just if we knew or thought we knew what the commission did, we would try to break it or do something that you should be able to do without permission. It was more homey opened up to everyone, it was more asking if they wanted to do their job and if anything didn't work as expected.

>> I just asked that because I'm in the process of doing that now, or at least I had been in the process of doing it now before March. I was really kind of frustrated with all of those things where the deduplication was just a reiteration of the codename. So I at one point started by just turning them off. Can I do the thing I think I can do with this? So I got my running log of

my definitions kind of assuming what these things did. So I was wondering if anyone else was doing and think I do similar.

>> One thing that I have mentioned, is that when we were going through our initial testing with our system login access managers, we would ask them if you are trying to do something with the that you're usually doing that doesn't work, give us that information about what it says. Because that kind of can help you reverse engineer some of that.

>> Yeah. I literally started with okay, I can log into the staff client, and now what? And I just added them back in one at a time. It is effective, but slow. This was super informative. And helpful. Thanks.

>> Thank you.

>> Diane, your question, translated into English, unfortunately what's there is what currently exists. So this is selling I hope to be able to work on as we run into issues with any permission or just trying to expand on that spreadsheet with the link in our slides. Just trying to expand the explanation of what it does. Great, Lindsay. Maybe we can collaborate there. And add to that list so we can make it a little more user-friendly.

Yes, does, Andrea. I think it would be helpful for a lot of folks here to attacking the spirit.

>> And trying to figure out, go from a problem to a solution, knowing I'm having this issue with the way that Evergreen is behaving. And talking throughout the entire list is the ability to create, to edit, an individual sort of thing. That is hard to figure out.

>> Yes, Andrea. I can never find a list of all the permissions that are actually in everything. So if you know of one, I know that at some point it included everything up to maybe version 2.1, of the permission that existed up to that point. But I don't really know what those were. (laughing) I guess it might be justly once that are in the documentation. But that's a mystery.

>> Your point about having more granular information, there is a certain set of permissions about being able to edit sort of tears of permission group privileges, this group evocation.something.something, I think there only

seven or so and of those in the system. And those you assign them to a permission group and that means that that permission group can then make adjustments to certain types of permission groups lower in the hierarchy. So that kind of -- it's not a very detailed permission structure.

Andrea mentioned about the kind of things that everything covers. I would be interested to see that.

Other thoughts or questions? What have y'all encountered when you are approaching trying to consider alterations to Staff Permissions or even users? Other questions or challenges that you faced when dealing with that sort of think? How many of you have attempted to take on a project anything like this? Tried to alter some of your permissions? Amen to that, CBurton. It took us a while to get rolling. We kind of knew what we wanted to do, but at one stage April is going through and permission by permission, what level does this want to be assigned out, how do we want to assign this given our inheritance structure.

So we didn't always get it right. And sometimes that's frustrating for people when they say all of a sudden I can't do this thing in acquisitions, and you had to sort of figure out, okay, that's because this needs to be at this level and some of that kind of stuff.

Diane, if we can -- if you need consultation on the troubles you're facing along the way or if we can be of any help, feel free to reach out to us.

Thanks, Debbie. I have to really give April credit for being able to approach this instruct -- such a structured and deliberate way. Not only figuring out what some of those group evocation permissions do, and we really didn't have any knowledge of that prior, but then being able to go into the inherited structure and figure out does that actually behave according to how we think this should behave, and once we had sort of our inheritance structure in place, going through that list of 400 and some odd individual permissions, it was a daunting task.

But hopefully, some of you if you're interested in doing something like this, might be able to make use of some of that work there and be able to iterate -- that and learn some things.

>> Was at 3.4, 3.6?

>> 3.3.4, I think --

>> Right 3.3.4. Right. We have been talking about 3.4, 3.5, okay, thanks, Courtney.

>> Okay. Lindsay saying that adding a couple of new permissions going from 3.2 to .4.

>> We did have to deal with that when upgraded. And I forget what the particular one was, but there was on the actual had to do with logging in and I think Blake ended up adding that on the database side.

>> Do you think this structure should replace the stat structure out of the box? April, having gone from I guess our training database has the stock structure period your thoughts on that?

>> I think the hierarchy structure is very useful. It depends on how it library system or consortium I want their individual permissions to be allocated. But I think the stock structure does not take advantage of the heritage in the way that I think is efficient. So that part of it for sure. I think the permission assignments are a little more case-sensitive, I guess. Use case.

>> We weren't sure, and I remember an early stage of this, we weren't sure that the inheritance actually worked the way that we eventually tested and found that it did work. We didn't know that for sure if you assign something at one level and you have inheritance coming off of that, that it would actually properly work because there were some permission bugs, as April mentioned. So I think anytime you consent if I like that, it's good. One of the choices we made that I think April mentioned was we didn't do any ad hoc assignable permissions. We said if it's in the permission group, you can get that permission group. But we are not going to have grantor, I think is the language, we are going to have grantor permissions for any of these stuff. We are going to make our structure.

>> Just from a database management standpoint, that made more sense, not to have those kind of ad hoc grant of all permissions. And we were able to arrive at a structure where they are not really needed, I don't think. That hasn't been an aspect that many libraries have issues with. Taken issue with. So I think it works pretty will this week, at least for us.

>> This subject has been addressed at the community level to his knowledge and it could be you are right. You've arrived at a more 2020 friendly structure.

>> The app. If anybody wants to -- want to migrate to be a part of that team. If any of you wants to take it.

>> Any other thoughts or comments? Let's see how we are doing on time here. About a quarter till. If not, we can go ahead and wrap up period I'm happy to brainstorm. I didn't see any other questions that have come up. April, what was your biggest surprise or what was the biggest thing that you learned going through this project?

>> At some point I was just overwhelmed by all the things that can go wrong. And so it was more just taking the plunge and knowing that with everybody invested and testing, we could figure it out if something didn't work. Because you could spend years trying to figure everything all permission out and exactly what it does. From an end user perspective, it's not having the insight of the developers who wrote the code, it's just daunting. So I think just sort of saying, I think that's what this does. It hasn't broken when I did my testing, let's throw it out there and see what other people discover. At some point you just had to take the plunge.

>> April, I can't remember what we discussed on this, but I remember there being questions about why we couldn't place holds using our staff logins. I'm still curious about the ability to place a recall hold for cataloging. Seems like that would be placed from the staff cataloging user account, but I can't remember the discussion on that.

>> The idea behind not using the staff login accounts for holds and circulations was to keep that data for those accounts cleaner and there

might be a use case for that, but we recommend using institution accounts for staff actions -- if you need to place a hold for story time or something like that. It's just a choice. There is not necessarily -- it doesn't necessarily mean that it absolutely shouldn't be done. It's not going to break the database or anything. But just in order to keep things cleaner, keep all of the personal usage off the staff login accounts is where we sort of drew the line.

>> Another aspect of that is that in Evergreen, this isn't the same in all ILS systems, creating a patient account is the same interface as creating a staff account. Creating a login account or an account in which you can interact with the staff interface.

But with the permissions, and with the structure of the circ policies and hold policies and all that kind of stuff, we segment the patient's from the people the people who are logging into the system. And so because there is that divide, we have some very generic rules set up for users at a very sort of high-level where if it doesn't happen to hit anything else in the permissions, at least it will hit that sort of user circulation policy. But the staff accounts are outside of I guess the Patron. But the staff accounts are segmented elsewhere. So we have it set up in the policies and a lot of cases that would do anything for the staff accounts. Or would encompass the behavior for the staff accounts. So that is part of the reason, too, I think with why we are trying to segment the behavior of log in, do something, and circular, check out books, interact with the software versus the ability to circulate items, that kind of stuff. I don't know if that makes sense pick it was a little longer -- yeah. I think that's part of the reason.

Yesterday's session spoke to some of the pros and cons of using staff accounts for circulation to ensure a recording will be released soon for further review.

It looks like we are about 10 minutes from the top of the hour. So thank you, everybody, for joining us for this session. And don't forget Amy will be hosting all of us tonight in what is it? Happy hour?

>> Virtual happy hour. So thank you both. This was a very informative, very we'll thought out presentation. It really shows the amount of work, tremendous amount of work you were involved with. So kudos to you both.

>> Thank you.

>> Also, if you're not going to stick around for Bill Erickson 's Angular Client presentation, please close out of the session to make room for others. And thank you for attending.