

# Sitka's Staff Documentation

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# Introduction

# New Staff Orientation

All new staff should read the following:

- <https://wiki.libraries.coop/doku.php?id=cooperative:orientation:about-the-coop> [About the Co-op]
- <https://wiki.libraries.coop/doku.php?id=cooperative:orientation:tools-and-systems> [Tools and Systems]
- <https://wiki.libraries.coop/doku.php?id=cooperative:orientation:procedures-and-expectations> [Procedures and Expectations]
- <https://wiki.libraries.coop/doku.php?id=techadmin:security:security-advisory-for-staff> [Security Advisory]

Co-op Support Staff

- <https://bcl.wiki.libraries.coop/doku.php?id=support:start> [Co-op Support Services]

# Tickets

# Chapter 1. Request Tracker

"RT" stands for "Request tracker". It's an open-source tool that the Co-op uses to track and manage communications.

## 1.1. Settings

*Settings*

1. RT at a glance - Home page refresh interval
2. Ticket Display - Notify me of unread messages
3. About Me - Signature  
  
image::images/Intro/signature.png [Signature]
4. Queue List - Select queues to be displayed on the **RT at a glance** page

## 1.2. Home Page

Co-op staff can configure RT as needed. Ask for help or share ideas for dashboards etc.

**RT at a glance: body**

**RT at a glance: sidebar**

## 1.3. General RT Guidelines

In addition to RT's auto-reply we strive to respond to sites within 24 hours of receiving a ticket (even if only to say we're working on it).

- Use Reply to respond to all Requestors. Replies are visible to sites on RT self serve site, and all requestors receive Replies automatically via email.
- Use Comment to correspond with Co-op staff. Comments are not visible to sites on RT self serve site, and requestors do not receive comments unless intentionally ccd.

Comment function is for internal communication. You can post a comment and pass the ticket to another owner, or post a comment and keep ownership. Usually, if you require someone to do an action on the ticket you should pass the ownership to them.

*To add a Comment:*

1. Click the Actions drop menu on the top left navigational menu for the ticket.
2. Select Comment
3. Enter the comment into the comment field, and cc the person you want the comment to go to (this is not needed, but will ensure the comment goes into their inbox and can help guarantee they receive it.)
4. Change the owner in the Ticket and Transactions area to the person you need to pass the ticket

to

### 1.3.1. Custom fields

In the main queues there are a variety of custom fields. These can vary by queue.

- Tags - what the ticket is about. These are customizable by queue.
- Library - the requesting library. Currently global, shared by all queues.
- Other custom fields in use are for tracking things like LP bugs links, Bibliocommons tickets links, servers affected, etc.
- Tickets should have one or more values assigned to each field (ctrl+click for multiple values) to improve searching and help track support trends.

*Adding to custom field menus when a new library joins or a new tag is required,*

1. Log into RT and click *Configuration* from the top menu bar
2. Select *Custom Fields*, then choose *Library* or *Tags* (under *Custom fields for tickets*)
3. Scroll to the bottom of the page to add a new value

### 1.3.2. Assigning RT priorities

**Urgent** Fatal failure across services or one entire service. Constitutes emergency support if after hours.

If - All sites affected If - Data loss or severe data corruption If - Co-op Servers down e.g. in Sitka core services stopped like circ, search, communication between servers that comprise Evergreen broken, or, for e.g. in LibPress all websites are down. If - Restart required for core services to be restored.

**High** Due to Failure of service or current prioritization of outcome (e.g. new service, new member expectations). May constitute emergency support if after hours.

If- Tickets from a new site that are affecting staff workflows If - tickets are a result of roll out of new version or new service /feature/function. If - Majority of sites affected (emergency support may have to kick in) If - Core services affected (emergency support may have to kick in) If - Service restart required for core services to be restored (emergency support should kick in) Examples: servers offline, email failure, holds targetter failure, Evergreen reporter offline, upgrade related patches or roll ups.

**Medium** If- Affects one or more site If - Costs site time/money, affects core public service workflows, or affects communications with their patrons (i.e. overdues not running, problem with fine generator, web site forms not working, etc.) Is a contractual obligation on Co-op's part – i.e. required for Co-op services to perform as per contracts and policy. e.g. MOU/SMA, is not fatal, but needs attention. Failure to provide a required outcome of the service, but not fatal. Examples: new site waiting for overdues to be set up, new site's fines not charging correctly, , OPAC display problems affecting most sites, EZ Proxy changes, for LibPress, basic website functionality affected or fixing menu links.

**Low** If- “How to” questions If -Can be resolved by information, or a scheduled cron job ,or by development,or a workaround. If -Things that need to be done, but don’t affect daily operations at all If- Affects one or few sites only, nice if it worked. Examples: cataloguing questions, policy questions, functionality questions, bug reporting, feature requests,

### **1.3.3. Using My Reminders in RT**

Each RT ticket has a Reminders section where you can type in reminders for yourself if you want. These Reminders will appear on your RT homepage (My Reminders area) so you can easily view and monitor them. It can be used like a checklist of to-do’s.

1. When you open a ticket there is a section for Reminders near the top right hand side of the ticket.
2. In the Subject box type in the Reminder you want to set
3. When you select the Due box it opens a drop box calendar you can navigate and pick the date the reminder is due. Or you can manually type the due date
4. When you are done simply select Save and the Reminder will appear in the ticket. If you RT homepage is set up to include Reminders it will appear there as well.
5. When you are done that task simply select the Reminder in the ticket, and hit Save and the Reminder will be resolved.
6. You can also select the Reminder from the My Reminder area of your RT homepage. This will take you to a new window for that Reminder, and the process to resolve is the same as above.

### **1.3.4. Bookmarking tickets**

Sometimes you may want to keep track of a ticket that you do not own. You can bookmark a ticket by opening it up and clicking on the star icon (it will turn yellow) in the top right menu. These bookmarked tickets should appear on your RT homepage under My Bookmarked Tickets. When you don’t want to track the ticket anymore, simply reselect the star icon and it will turn back to grey.

### **1.3.5. How to Create a Ticket in RT**

On your RT homepage, at the top right of the page, in the blue bar, there is a darker blue New ticket in button don’t select the button. Beside this button is a white drop down menu. Open the dropdown menu and select the type of ticket you want to create.

There are queues: Sitka Support: Testing:

In the Subject line of the ticket enter the name of the book or title for the ticket you are creating. In the Basics area on the right, set the owner to the appropriate person. In the Custom Fields area on the right, you only need to set these fields (using the above instructions): Switch to the Details button at the top right corner and set the following fields: Set the Priority (using the above instructions). Once all is good, click Create. The ticket should appear in the appropriate queue.

# Chapter 2. Bounced Mail

## *Process to Deal with Items in Bounced Mail Queue*

1. Ticket is received in Bounced Mail Queue
2. Determine the type of bounce (SMS Hold Notification, Report Notification, Out of Office, Password Reset Request, Co-op Website, Other)
  - a. SMS = Notify Library
  - b. Report = Notify Library
  - c. Out of Office = Ususally just delete, but read the message first, if it is an extended absence remove from mailing list
  - d. Password Reset Request = Notify Library
  - e. Co-op Website = Notify appropriate group
  - f. Other = we have outlined the most common instances of bounce mail here, other scenarios will need to be handled as they arise (document issue & resolution here if it is something that may happen again)a

## *Evergreen SMS*

1. Edit Subject Line
  - a. Add library short code to the beginning
  - b. Add SMS to the end
  - c. ex. BSQ - Undelivered Mail Returned to Sender - SMS
2. Add Library as Requestor
3. Email the patrons library to follow-up
  - a. Specify Patron First Name (easier for Libraries to follow-up)

Hello,

We received the following failure message for a Text message hold notification for one of your patrons. Please follow up with your patron to let them know that the hold is available for pickup and verify the phone # on file.

## *Evergreen Reports*

1. Edit Subject Line
  - a. Add library short code to the beginning
  - b. Add Reports to the end
  - c. ex. BSQ - Undelivered Mail Returned to Sender - Reports
2. Add Library as Requestor
3. Email the patrons library to follow-up

Hello

We received the following report completion notification as a bounced email.

Email sent to {Insert Email Address}

{Insert Report Details}

It appears as though the email address was maybe entered incorrectly. If this is a recurring report, you will need to delete the existing report and set it up using the correct email address.

Instructions can be found here <http://docs.sitka.bclibraries.ca/Sitka/current/html/recurring-report.html>

Please let us know if you have any questions.

#### *Evergreen Notification*

1. Edit Subject Line
  - a. Add library short code to the beginning ex. BSQ - Undelivered Mail Returned to Sender
2. Add Library as Requestor
3. Email the patrons library to follow-up

Hello

We have been receiving your libraries bounced emails for automatically generated patron notices (e.g. email overdue, email holds notification). These bounced emails are caused by patrons with incorrect email addresses or problems with the patrons' mail servers.

In order for you to receive these emails you will need to add an email address to the "sending email address for patron notices" setting in the Library Settings Editor in Evergreen.

You must be logged in with a Local System Administrator account to complete the following

- Click on Admin
- Select Local Administration
- Select Library Settings Editor
- Choose your Library in the Context Location (this will default to the location your workstation is registered to)
- Search or Scroll to find the setting "Program: Sending email address for patron notices"
- Click on Edit
- Choose your Library in the Context field (this will default to the location your workstation is registered to)
- Enter the email address in the Value field
- Click on Update Setting

It is good practice to set up a generic account, like [info@nameofyourlibrary.ca](mailto:info@nameofyourlibrary.ca), so that one person's individual email inbox doesn't get cluttered with emails that were not delivered.

Please let me know if you have any questions.

*Website*

1. Follow-up with the appropriate Group (NNELS, Licensing, LibPress)

*Auto-Reply / Out of Office*

1. Read the message if regular vacation - Just delete the ticket
2. If extended Out of Office (Parental Leave / Sabbatical) - Remove from Email Group

*Password Resets*

1. Edit Subject Line
  - a. Add library short code to the beginning
  - b. Add Password to the end ex. BSQ - Undelivered Mail Returned to Sender - Password
2. Add Library as Requestor
3. Email the patrons library to follow-up

Email the patrons library to follow-up

Hello,

Your Patron {Insert Patron Email address} has requested a password reset, but the request was bounced back to us, most likely due to an invalid email address. Please follow up with the patron to reset their password and verify the email address in the Patron account.

# Chapter 3. Feature Requests

Feature request = a system change or enhancement requested by a Sitka Site.

## *Process*

1. Ticket is received
2. Make sure request includes all necessary information, make sure we have a clear understanding of what the library is asking for - email library for clarification if required
3. Include descriptive subject line.
4. Specify "Feature Request" in subject line.
5. Add appropriate tags
6. Search RT for existing tickets - link or merge as appropriate
7. Search Launchpad for Bug or Wishlist Item -
8. If no existing bug / wishlist item, create one
9. If there is an existing bug - Select "This bug affects you"
10. Add launchpad bug # to RT Ticket
11. If indicated on Launch pad - include expected release in RT Ticket
12. Move to Feature Request Queue
13. Set ticket priority
  - a. Low = 1 library request, or obscure feature (may be related to workflow, or library process)
  - b. Medium = +1 library request, or useful feature that more sites will benefit from
  - c. High = +1 library request, Interrupts workflow, or is a bug that requires significant development to resolve.
  - d. Urgent - important or essential feature lost through upgrade
14. Email library to advise issue has been put in feature request queue
15. Include information about status (Launch pad / Sitka Development work)

# Chapter 4. Sitka Bugs

Sitka Bug = an issue with Sitka's Evergreen that requires development

Bugs are tracked separately from other support requests.

## Process

1. Ticket is received
2. Make sure request includes all necessary information, make sure we have a clear understanding of what the library is asking for - email library for clarification if required
3. Include descriptive subject line.
4. Add appropriate tags
5. Search RT for existing tickets - link or merge as appropriate
6. Search Launchpad for Bug -
7. If no existing bug, create one
8. If there is an existing bug - Select "This bug affects you"
9. Add launchpad bug # to RT Ticket
10. If indicated on Launch pad - include expected release in RT Ticket
11. Move to Sitka Bugs Queue
12. Set ticket priority
  - a. Low = 1 library request, or obscure feature (may be related to workflow, or library process)
  - b. Medium = +1 library request, or useful feature that more sites will benefit from
  - c. High = +1 library request, Interrupts workflow, or is a bug that requires significant development to resolve.
  - d. Urgent - important or essential feature lost through upgrade
13. Email library to advise issue has been put in feature request queue
14. Include information about status (Launch pad / Sitka Development work)

Must have a Launchpad Bug # Must have a Priority Must have a Bug Tag

- Waiting for upstream fix = a bug waiting for an upstream fix
- Community fix available = a bug with a community fix available for testing (Flag for Bug Squashing week etc)
- Test in 3.next = fix committed upstream - needs to be tested on Sitka's Evergreen test server
- Fixed in 3.next = tested and confirmed fixed on Sitka's Evergreen test server

## NOTE

There should only be one ticket for each bug - duplicate tickets (other tickets regarding this issue should be linked & resolved with resolution = upstream)

# Chapter 5. Tickets for contact Changes

## 5.1. Email changes

1. Library staff
  - a. Evergreen staff account
  - b. Co-op Web
2. Library Main Email
  - a. Co-op Web
  - b. RT
  - c. LibPress
  - d. Evergreen Server Admin → Organizational Units
  - e. Evergreen Library Settings Editor → Sending email address for patron notices
  - f. Evergreen Paper Overdue notices

## 5.2. Website URL Change

- Current Sitka Libraries - <https://bc.libraries.coop/services/sitka/current-sitka-libraries/>
- Public Catalogue - Library Home link
- Evergreen Paper Overdue notice template

# Tier 1 Support

# Chapter 6. Supporting Sitka's Evergreen

## 6.1. Sitka Staff account

Sitka Staff permissions are the highest level permissions and can do almost anything in the staff client for any library.

**NOTE** | With great power comes great responsibility.

## 6.2. Logging Into Evergreen

Choosing a workstation

- All patron / staff account tickets will require you to login to a library specific workstation location
- Admin / policy tickets can be done from any workstation location

# Chapter 7. Library Staff accounts

Library staff accounts are the same as patron accounts with two differences.

1. Staff accounts use Main (Profile) Permissions Groups with permissions that give access to Evergreen's staff functions.
2. Staff accounts have working locations which tell Evergreen which libraries or branches an account can be used at.

[http://docs.libraries.coop/sitka/\\_library\\_staff\\_accounts.html](http://docs.libraries.coop/sitka/_library_staff_accounts.html) [Related Chapter in Sitka's Evergreen Documentation]

## NOTE

You must log in using a workstation registered to the requestors home library for all Library Staff related tickets.

## 7.1. Grant Local System Administrator Permissions

The Local System Administrator permission group can only be assigned by Sitka Staff. Libraries may create an account using any permission group and then submit a support request for local system administrator permissions.

*process*

1. Log in using a workstation registered to the requestors home library.
2. Go to **Circulation** → **Check Out**.
3. Retrieve account using account barcode (or Patron Search).
4. Check the **User Permission Editor** to verify the account has a working location.
5. Check to make sure the account has an email address.
6. Edit → Change **Main (Profile) Permission Group** = Local System administrator.
  - a. Make sure to choose the correct group by library type (Public, Post-Sec, Special or Government).
7. Click **Save**.

## 7.2. Renew/Edit LSA Account

The Local System Administrator permission group can only be edited by Sitka Staff

*process*

1. Log in using a workstation registered to the requestors home library.
2. Go to **Circulation** → **Check Out**.
3. Retrieve account using account barcode (or Patron Search).
4. Edit → Make requested changes or click **Update Expire Date**.
5. Click **Save**.

## 7.3. Grant Reporter Permissions

### *All Staff Permissions*

1. Add perms\*\*
2. Add barcode to end of Ticket Subject
3. Add library code to subject (start)
4. Add library tag
5. Resolved / Fixed
6. Reply to Requestor - Reporter View Output Permissions granted & link to docs

### *Full Reporter Permissions*

1. Ticket is received in Sitka Support Queue with subject = **New Full Reporter Privacy Waiver Submission**
2. Log in to Evergreen using a workstation registered to the requestors home library
3. Go to **Circulation** → **Check Out**
4. Retrieve account using account barcode (or Patron Search)
5. Edit → Verify the account contains the following: First Name, Last Name, Email, Phone Number, & Address.
  - a. Incomplete staff accounts will not be granted reporter permissions.
6. Click **Secondary Groups** → choose **Reporter Full Permissions**
7. Click **Add**
8. Click **Apply Changes**
9. Click **Save**
10. Update RT ticket
  - a. Add the library code to start of the ticket subject
  - b. Add the account barcode to end of the ticket subject
  - c. Add library tag
  - d. Set status to Resolved
  - e. Set resolution to Fixed
11. Reply to Requestor
  - a. Include links to reports documentation

## 7.4. New SIP Account

### *New SIP account*

1. Ticket is received in Sitka Support Queue
2. Check the wiki [https://wiki.libraries.coop/doku.php?id=sitka:sip2\\_users](https://wiki.libraries.coop/doku.php?id=sitka:sip2_users) [SIP] to determine if this is for an approved vendor/product

- a. If not - Assign the ticket to Christine
- b. If yes - Create a SIP-Client account in EG.

#### *Create a SIP-Client account*

1. Log in to Evergreen using a workstation registered to the requestors home library
2. Go to **Circulation** → **Register Patron**
  - a. create a user with profile "SIP Client" and barcode/username of the form sip2-shortname-service.
  - b. Use a password generator to create a secure 16 digit alphanumeric password.
3. Record the account information on the wiki SIP2 User page
4. Add a comment to the ticket with a CC to Jeff asking him to add the new account's username and password to SIP server config.
5. The next day, send the connection info to the library.
  - a. The hostname, server port & username can be sent as a reply to the RT ticket.
  - b. The password should be sent in a separate email with no context

## 7.5. Evergreen Self Check

#### *Create an Evergreen Self Check account*

1. Log in to Evergreen using a workstation registered to the requestors home library
2. Go to **Circulation** → **Register Patron**
  - a. create a user with profile "Self Check Login" and barcode/username of the form shortnameselfcheck.
  - b. Use a password generator to create a secure 16 digit alphanumeric password.
3. Record the account information on the wiki [https://wiki.libraries.coop/doku.php?id=sitka:support:self\\_check](https://wiki.libraries.coop/doku.php?id=sitka:support:self_check)

# Chapter 8. Action Triggers

<http://docs.libraries.coop/sitka/admin-notice.html> [Patron Notifications]

[https://bcl.wiki.libraries.coop/doku.php?id=sitka:support:administration:name\\_trigger](https://bcl.wiki.libraries.coop/doku.php?id=sitka:support:administration:name_trigger) [Action Trigger info from Wiki]

Action Trigger templates are used in various system processes

*Action Triggers are used for*

- Some Print functions
- Automatically set overdue items to Lost
- Patron Email Notifications

Some templates are set at the Sitka level and cannot be customized. Most templates are customizable per library.

*Can't customize*

- Print Call number
- Print PO

*Can customize*

- Courtesy Notifications
- Overdue Notifications
- Lost Notifications
- Circulation Notifications
- Hold Notifications
- Patron Account Notifications

## 8.1. Edit Action Trigger Templates

*Edit existing templates*

1. Go to **Administration** → **Local Administration** → **Notification/Action Triggers**.
2. Filter to find the template that needs to be updated.
3. Select the template and click **Actions** → **Edit Selected**.
4. Modify the template as needed.
5. Click **Save**.

## 8.2. Clone Action Trigger Templates

*Clone existing templates*

1. Go to **Administration** → **Local Administration** → **Notification/Action Triggers**.

2. Filter to find an existing template to copy
3. Select the template and click **Actions** → **Clone Selected**.
4. An alert will appear **Clone event definition environment as well?** → Click **Confirm**
5. Enter **Owning Library**.
6. Add the library short code to the **Name** field.
7. Modify the template as needed.
8. Click **Save**

## 8.3. Other info

Events that use opt\_in\_setting: *circ.default\_overdue\_notices\_enabled*

- New/expiring accounts
- Predue/overdue/marked lost
- New due date by emergency closing
- Fine limit exceeded.

They use the following hooks:

- *autorenewal*,
- *checkout.due*,
- *checkout.due.emergency\_closing*,
- *lost*,
- *lost.auto*,
- *lost.found*,
- *penalty.PATRON\_EXCEEDS\_FINES*
- *au.created*,
- *au.expired*

**NOTE** | Emailing checkout receipt uses opt\_in\_setting: *circ.send\_email\_checkout\_receipts*

**NOTE** | Events related to holds (including expiring holdshelf), booking reservation, checkin with missing pieces, recall **do not** use the opt\_in\_setting.

## 8.4. Auto to Lost Triggers

The auto to lost trigger and associated email notification must be set up in a very specific way.

### 8.4.1. Setting Up the Email Notification

1. Go to **Administration** → **Local Administration** → **Notification/Action Triggers**.

2. Filter to find an existing template to copy
3. Select the template and click **Actions** → **Clone Selected**.
4. An alert will appear **Clone event definition environment as well?** → Click **Confirm**
5. Enter **Owning Library**.
6. Add the library short code to the **Name** field.
7. Set Enabled to be un-checked.
8. Modify the template as needed, make sure the days overdue is correct for what the library wants.
9. Click **Save**

### 8.4.2. Setting Up the Auto to Lost Trigger

This action trigger will not work properly if cloned.

1. Go to **Administration** → **Local Administration** → **Notification/Action Triggers**.
2. Click **New Event Definition**.
3. Enter the following information:
  - a. Owning Library: LIBRARYCODE
  - b. Name: LIBRARYCODE XX Day Overdue Mark Lost
  - c. Hook: checkout.due
  - d. Enabled: leave un-checked
  - e. Processing Delay: XX days
  - f. Processing Delay Context Field: Due Date
  - g. Reactor: MarkItemLost
  - h. Validator: CircIsOverdue
  - i. Granularity: daily
  - j. Max Event Validity Delay: You **MUST** leave this field blank
  - k. Retention Interval: you **MUST** leave this field blank
  - l. Context Bib Path: target\_copy.call\_number.record
  - m. Context Item Path: target\_copy
  - n. Context Library Path: circ\_lib
  - o. Context User Path: usr
4. Click **Save**.

### 8.4.3. Turning on Auto to Lost

When auto to lost is turned on for the very first time it will run overnight and set everything that is past the overdue threshold to lost. This is contingent on there being no value set for *Max Event Validity Delay* or *Retention Interval*; if values are present not all long overdue items will be set to

lost.

1. Confirm that everything is correct for both the email notification and the auto to lost trigger.
2. Check the box for Enabled in the email notification.
3. Click **Save**.
4. Check the box for Enabled in the auto to lost.
5. Click **Save**.
6. The next day, open the auto to lost trigger.
7. Enter the following information:
  - a. Max Event Validity Delay: Enter a value between the Processing Delay and Processing Delay + Retention Interval
  - b. Retention Interval: 3 mons
8. Click **Save**.

**CAUTION**

There is a bug preventing values from being removed from the *Max Event Validity Delay* or *Retention Interval* fields in the staff client. This means that inactive auto to lost triggers can't just be turned back on in the staff client; they should be referred to Tier2 Support.

# Chapter 9. Permission Tree display

Libraries can request for us to customize the displayed list of permission groups for easier patron registration. The drop-down menu for Main (Profile) Permission Group on the Register Patron and Patron Edit screens will be customized to show only the permission groups the library currently uses.

## *Add New Custom Permission Tree*

1. Library Sends Request
2. Run Report to verify permission groups in use (remember to include staff!!)
3. **Administration** → **Local Administration** → **Permission Tree Display Entries**
4. Permission Group Entries in Library:
5. Click **Add**
6. Add Root Entries for **Library Users** and **Library Staff**
  - a. Choose the appropriate types based on Libray Type (Public, Post-Secondary, Special)

## *Edit Custom Permission tree*

1. **Administration** → **Local Administration** → **Permission Tree Display Entries**

# Tier 2 Support

# Chapter 10. Circulation Policies

[https://bclc.wiki.libraries.coop/doku.php?id=sitka:support:administration:circ\\_policy](https://bclc.wiki.libraries.coop/doku.php?id=sitka:support:administration:circ_policy) [Circulation Policy info from Wiki]

## 10.1. Edit Circulation policies

## 10.2. Add Circulation policies

*Related*

- Circulation Limit Sets
- Circulation Duration Rules
- Circulation Recurring Fine Rules
- Circulation Max Fine Rules
- Hard Due Dates

## 10.3. Auto-Renewal

# Chapter 11. Hold Policies

[https://bclc.wiki.libraries.coop/doku.php?id=sitka:support:administration:hold\\_policy](https://bclc.wiki.libraries.coop/doku.php?id=sitka:support:administration:hold_policy) [Circulation Policy info from Wiki]

## 11.1. Edit Hold policies

## 11.2. Add Hold policies

Note .Set home library to individual library and not Sitka for any library that doesn't do reciprocal borrowing

## 11.3. Suspend ILC Holds

*Stop inbound ILC hold*

1. Set Hold Hard Boundary to 3 for the request library on Library Settings Editor

*Stop outbound ILC hold*

- Choose one of the following based on the setup of the library's existing hold policies:
  - If the library does not apply age-based hold protection, add a hold policy with pickup\_lib=BC\_ILC, owning\_lib=circ\_lib= individual library, circ\_modifier is null, holdable is false. Deactivate it to reopen outbound ILC hold.
  - If the library applies age-based hold protection on all items, remove the value in Item Age < field (example: policy id 633 with pickup\_lib=BC\_ILC, owning\_lib=circ\_lib=BTE, circ\_modifier is null). Keep the value in the RT ticket. Add it back to reopen ILC outbound hold.
  - If there is an inactive hold policy blocking ILC holds from #1, activate it.

# Chapter 12. Hard Due Date

Academic libraries may wish to use hard due dates to truncate due dates at the end of a semester or allow particular material to go out for an entire semester. Library staff do not have permissions to add or edit hard due date rules. See [http://docs.libraries.coop/sitka/\\_hard\\_due\\_date.html](http://docs.libraries.coop/sitka/_hard_due_date.html)

## 12.1. Update Hard Due Date

When updating an existing hard due date rule you must update the ceiling date display and add a new hard due date value

### *Edit Ceiling Date*

1. Go to **Administration** → **Server Administration** → **Hard Due Date Changes**.
2. Select the rule you want to edit and click **Actions** → **Edit Selected**.
3. Enter the **Current Ceiling Date**.
4. Click **Save**.

### *Add New Hard Due Date Value*

1. Click **Values**
2. Click **New Hard Due Date Values**
3. Enter the **Active Date**
4. Enter the **Ceiling Date**
5. Click **Save**

### **NOTE**

Libraries can submit all the hard due dates for the year. Use the active/ceiling date to enter all the dates for fall, winter, and summer terms.

## 12.2. New Hard Due Date

To setup a new hard due date you must create the new hard due date and then link it to the applicable circulation policies.

### *New Hard Due Date*

1. Go to **Administration** → **Server Administration** → **Hard Due Date Changes**.
2. Click **New Hard Due Date**.
3. Enter a **Name**
4. Enter the **Owner**
5. Enter the **Ceiling Date**
6. Check the box for **Always Use?** if the rule should apply all the time.
  - a. Leave this unchecked if the rule only applies when the regular due date would fall after the hard due date.

7. Click **Save**

*Add New Hard Due Date Value*

1. Click **Values**.
2. Click **New Hard Due Date Values**.
3. Enter the **Active Date**
4. Enter the **Ceiling Date**
5. Click **Save**

*Add Hard Due Date to Circulation Policies*

1. Go to **Administration** → **Local Administration** → **Circulation Policies**
2. Add the Hard Due Date rule to the policies it should apply to
3. See [http://asciidoc.libraries.coop/sitka-style-master/html/\\_circulation\\_policies.html#\\_edit\\_circulation\\_policies](http://asciidoc.libraries.coop/sitka-style-master/html/_circulation_policies.html#_edit_circulation_policies)

# Chapter 13. Emergency Closing Procedures

1. Enter Emergency Closing
2. Disable holds (ILC & local)
3. OPAC banner
4. Website banner
5. Renew expiring patrons

# Creating Support Resources

# Chapter 14. Style guide

## 14.1. Creating Support Resources

[https://wiki.libraries.coop/doku.php?id=cooperative:communications:visual\\_identity](https://wiki.libraries.coop/doku.php?id=cooperative:communications:visual_identity) [Visual Identity]

[https://wiki.libraries.coop/doku.php?id=sitka:support:creating\\_support\\_resources:style\\_guide](https://wiki.libraries.coop/doku.php?id=sitka:support:creating_support_resources:style_guide) [AsciiDoc Style Guide]

[https://wiki.libraries.coop/doku.php?id=sitka:support:creating\\_support\\_resources:style\\_guide:consistent\\_wording](https://wiki.libraries.coop/doku.php?id=sitka:support:creating_support_resources:style_guide:consistent_wording) [Consistent Wording]

# Public Catalogue

# Chapter 15. Bootstrap Settings

These are all from the individual opac\_config.yml skin library records.

## Settings

- If you want the text in the header section to be black add the line below to the config section.
  - header\_has\_light\_background: true
  - see BVIC for example
- If you want the text in the footer section to be black add the line below to the config section.
  - footer\_has\_light\_background: true
  - see BTA for example
- The facet colour is controlled by the facets\_back setting in the colors: section.
- The header colour is controlled by the header\_primary setting in the colors: section.
- The header fade colour is controlled by the header\_primary\_fade setting in the colors: section.
- The footer colour is controlled by the footer\_primary setting in the colors: section.
- The footer fade colour is controlled by the footer\_primary\_fade setting in the colors: section.
- Lots of button type settings are controlled by the button\_confirm setting in the colors: section.
  - example, My Account login button, Submit button, Search Filters bars, Back To Results button

### NOTE

The extra bib detail horizontal bars are still controlled by the extras\_bar\_bg setting in the colors: section.

### NOTE

The Search button is still controlled by the button\_bg setting in the colors: section.

### NOTE

A lot of the other changes, like bolding the footer and header text are system wide and exist in the style.css.tt2 record in /srv/openils/var/templates-bootstrap/opac/css