

NTLC – Creating Staff Users
Judy Daniluk, August 2009

NEW STAFF USERS

1. You have to be logged in at the 'NTLibraryDirector' level or higher to create or change staff accounts.
2. New Staff users are set up the same way you register a new patron. If you want a generic staff login that doesn't correspond to an individual library card, you can make up some spelled-out word to use as a barcode, like sangercircstaff.
3. If you create a new user by typing in a barcode, Evergreen suggests the same thing for the username. You can let the username be the same as the barcode, or you can assign a different username.
4. You can assign a password when you set up a new user. You can also change a user's password through the 'Patron Edit' screen.
5. To make the new user a STAFF user instead of a PATRON, on the 'Permissions' screen, pick one of the user groups under 'Staff'. For example, NTCirc1, NTCirc2, NTCirc3, NTCat1, NTCat2, NTCat3, NTSuperStaff. You have to be logged in at the 'admin' level to create a user at the level NTLibraryDirector.
6. Enter other required information, go to the last screen, and Save Changes.
7. After the user is set up, go to the Admin menu and choose 'User Permissions Editor'. Enter the user's barcode. For Working Location, check the library(s) where the new user is allowed to work.

CONVERTING AN EXISTING PATRON TO A STAFF USER

1. To turn an existing patron into a Staff Login, bring up the patron record in the 'Edit' screen.
2. On the 'Permissions' screen, pick one of the user groups under 'Staff'. For example, NTCirc1, NTCirc2, NTCirc3, NTCat1, NTCat2, NTCat3, NTSuperStaff. You have to be logged in at the 'admin' level to assign NTLibraryDirector.
3. Go to the last screen and Save Changes.
4. After the user is set up, go to the Admin menu and choose 'User Permissions Editor'. Enter the user's barcode. For Working Location, check the library(s) where the new user is allowed to work.

OTHER NOTES

1. To log in to the staff client, use the USERNAME.
2. To log in to the OPAC, use either the USERNAME or the BARCODE.
3. You can change your own USERNAME or PASSWORD in the OPAC, under 'My Account'
4. You can change your staff members' USERNAME or PASSWORD in the Edit Patron screen.
5. You can't change a BARCODE. You would have to mark the old one 'lost' and create a new one.