

Admin/Permissions Working Group

Evergreen Hackfest

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Thursday, May 15, 2025 @ 3:45 - 5:00 p.m. EST

Permissions Working Group

1. Reminders
 - a. Meeting schedule: 4th Tuesday of each month @ 3 p.m.
 - b. [Google Group](#)
 - c. [Wiki](#)
2. Continuing Projects/Documentation
 - a.  EG Permission Testing
 - i. **All** tab: list of all permissions with descriptions, testing notes, and links to related bugs
 - ii. Workflow tabs (**Acquisitions** → **Workstation**): list of tasks broken out by role and their associated permissions, alert messages, and context
 - b.  Permissions Documentation Reorg_2.1.24
 - c.  Evergreen Stock Permission Groups (3.14)
 - d.  Circulation Permission Review
3. Updates
 - a. Working on cleaning up:
 - i.  Circulation Permission Review
 - ii.  Cataloging Permission Review
 - b. Meeting schedule
 - i. Move to every other month (switch off with Admin group)?
4. Bugs
 - a. [All permissions bugs](#)
 - b. [New permissions bugs](#)
 - i. [LP2110057](#): PATRON_IN_COLLECTIONS.override permission missing in seed data
 - c. **Susan will create a bug spreadsheet to include current status, last activity, etc.
5. Next Meeting: TBD
 - a. Project regroup
 - b. Other topics

Admin Working Group

- [Wiki](#)
- Listserv: [Main Evergreen Discussion List](#)
- Main topic: Holds stalling and everything else holds!

Notes

- Alternate months for meeting (go to bimonthly instead of monthly)
- For PWG, Susan will create a bug spreadsheet
- Hard and soft stalling
(<https://docs.evergreen-ils.org/docs/latest/admin/librarysettings.html>)
 - Two settings: Pickup library hard stalling interval and Pickup library soft stalling interval
 - PINES: Trying to reduce transits
 - OWWL: in attempt to stop some issues caused when a library is closed and doesn't pull holds; and issues with opportunistic capture
 - the action.unfulfilled_hold_list is useful (but very raw) data for looking at this
- Hold retarget interval global flag to account for closed days
- Presentations:
 - Geolocation; Llewellyn Marshall, NC Cardinal:
<youtu.be/LkofZTGkiig?si=mqQd5zQCe02DduS4>
 - Hungry, Hungry Hippos, Andrea/Mike/Angela; Equinox:
<youtube.com/watch?v=MS0ceUm7New>
 - BHSSO
- Hold reset entries
 - Helpful in figuring out when holds time out (holds target interval)
 - And when very smart patrons figure out how to work the system on age protected items 😊
- BHSSO
 - Default (when nothing is set)
 - Owning Lib to Patron Home Lib Proximity = 1 Adjusted Circ Lib to Pickup Lib Proximity = 2 Hold Priority = 3 Hold Cut-in-line State = 4 Hold Selection Depth = 5 Hold Request Time = 6 Item Has Circulated From Home Lately = 7 Circ Lib to Request Lib Proximity = 8 Adjusted Capture Location to Pickup Lib Proximity Capture Lib to Pickup Lib Proximity Item Has Been Home At All Lately
- OWWL changed to FIFO with Holds Always Go Home so those branch's patrons always have priority, but also use it with age protection
- Script to gain more information about what policy is followed/why a library's items are being target for external holds with details: select * from action.find_hold_matrix_matchpoint(226,226,19882493,7105759,7105759)

Scripts for Holds Testing from Benjamin Murphy @ NC Cardinal:

```
-----  
-- list of all active hold policies  
-- in this case, all hold policies at or below system org unit 324 (defined at end)  
-- hardcodes a sort by permission group based on perm grp ID  
-----
```

```
select hmm.id as "ID", (case when hmm.holdable then 'Yes' when not hmm.holdable then 'No' else "  
end) as "Holdable"  
, (case when OU1.ou_type = 3 then (select shortname from  
actor.org_unit_ancestor_at_depth(OU1.parent_ou,1)) || ':' || OU1.shortname else OU1.shortname  
end) as "UserHomeLib"  
, (case when OU2.ou_type = 3 then (select shortname from  
actor.org_unit_ancestor_at_depth(OU2.parent_ou,1)) || ':' || OU2.shortname else OU2.shortname  
end) as "ReqLib"  
, (case when OU5.ou_type = 3 then (select shortname from  
actor.org_unit_ancestor_at_depth(OU5.parent_ou,1)) || ':' || OU5.shortname else OU5.shortname  
end) as "PickupLib"  
, (case when OU3.ou_type = 3 then (select shortname from  
actor.org_unit_ancestor_at_depth(OU3.parent_ou,1)) || ':' || OU3.shortname else OU3.shortname  
end) as "CopyOwningLib"  
, (case when OU4.ou_type = 3 then (select shortname from  
actor.org_unit_ancestor_at_depth(OU4.parent_ou,1)) || ':' || OU4.shortname else OU4.shortname  
end) as "CopyCircLib"  
, PG1.name as "UserGroup", PG2.name as "RequesterGroup", hmm.circ_modifier as "CircModifier",  
hmm.max_holds as "MaxHolds", hmm.description as "Notes"  
, hmm.ref_flag as "Ref", hmm.distance_is_from_owner, hmm.transit_range,  
hmm.include_frozen_holds, hmm.stop_blocked_user, hmm.strict_ou_match  
, (case when hmm.usr_grp=1 then 1 when hmm.usr_grp=25 then 2 when hmm.usr_grp=27 then 3  
when hmm.usr_grp=26 then 4 when hmm.usr_grp=78 then 5 when hmm.usr_grp=32 then 6 when  
hmm.usr_grp=30 then 7 when hmm.usr_grp=37 then 8 when hmm.usr_grp=43 then 9 when  
hmm.usr_grp=79 then 10 when hmm.usr_grp=19 then 11 when hmm.usr_grp=3 then 12 when  
hmm.usr_grp=86 then 13 when hmm.usr_grp=42 then 14 else 0 end) AS permsort  
, (case when hmm.circ_modifier='BOOK' then 1 when hmm.circ_modifier='VIDEO' then 2 when  
hmm.circ_modifier='AUDIOBOOK' then 3 when hmm.circ_modifier='MUSIC' then 4 when  
hmm.circ_modifier='RENTAL' then 5 when hmm.circ_modifier='KIT' then 6 when hmm.circ_modifier  
='TECHNOLOGY' then 7 when hmm.circ_modifier='EQUIPMENT' then 8 when hmm.circ_modifier  
='MAGAZINE' then 9 when hmm.circ_modifier='LAPTOP' then 10 when hmm.circ_modifier='GAME'  
then 11 when hmm.circ_modifier='HÖTSPOT' then 12 when hmm.circ_modifier='PLAYAWAY' then  
13 when hmm.circ_modifier='ILL' then 14 when hmm.circ_modifier='MISC' then 15 when  
hmm.circ_modifier='MICROFORM' then 16 when hmm.circ_modifier='PERIODICAL' then 17 when  
hmm.circ_modifier='VERTICAL FILE' then 18 when hmm.circ_modifier='DOCUMENT' then 19  
when hmm.circ_modifier='SOFTWARE' then 20 when hmm.circ_modifier='NEWSPAPER' then 21  
when hmm.circ_modifier='MAP' then 22 when hmm.circ_modifier='ART PRINT' then 23 else 0 end)  
as circmodsort  
, (case when OU1.id = 1 then " when OU1.ou_type = 3 then (select shortname from  
actor.org_unit_ancestor_at_depth(OU1.parent_ou,1)) else OU1.shortname end) || (case when  
OU2.id = 1 then " when OU2.id = OU1.id then " when OU2.ou_type = 3 then (select shortname from  
actor.org_unit_ancestor_at_depth(OU2.parent_ou,1)) else OU2.shortname end) || (case when  
OU5.id = 1 then " when OU5.id = OU1.id then " when OU5.id = OU2.id then " when OU5.ou_type =  
3 then (select shortname from actor.org_unit_ancestor_at_depth(OU5.parent_ou,1)) else  
OU5.shortname end) || (case when OU3.id = 1 then " when OU3.id = OU1.id then " when OU3.id =
```

```

OU2.id then " when OU3.id = OU5.id then " when OU3.ou_type = 3 then (select shortname from
actor.org_unit_ancestor_at_depth(OU3.parent_ou,1)) else OU3.shortname end) AS ousort
from config.hold_matrix_matchpoint as hmm
LEFT JOIN actor.org_unit AS OU1 ON (hmm.user_home_ou = OU1.id)
LEFT JOIN actor.org_unit AS OU2 ON (hmm.request_ou = OU2.id)
LEFT JOIN actor.org_unit AS OU3 ON (hmm.item_owning_ou = OU3.id)
LEFT JOIN actor.org_unit AS OU4 ON (hmm.item_circ_ou = OU4.id)
LEFT JOIN actor.org_unit AS OU5 ON (hmm.pickup_ou = OU5.id)
LEFT JOIN permission.grp_tree as PG1 on (hmm.usr_grp = PG1.id)
LEFT JOIN permission.grp_tree as PG2 on (hmm.requestor_grp = PG2.id)
where hmm.active = 't'
and (
OU1.id in (select id from actor.org_unit_descendants(324))
or OU2.id in (select id from actor.org_unit_descendants(324))
or OU3.id in (select id from actor.org_unit_descendants(324))
or OU4.id in (select id from actor.org_unit_descendants(324))
or OU5.id in (select id from actor.org_unit_descendants(324))
)
order by ousort, permsort, circmodsort, 2

```

-- look at why a library's items are being targeted for external holds with details
-- two versions of mymig.score_hold_matrix_matchpoints(), 1 with just hold ID and one with pickup,
request lib, item id, usr, requestor

```
select round(results.total_score, 2), results.matchpoint, hmm.active as "Active"  
, OU1.shortname as "User Home Lib", round(home_lib_score, 2) as "UsLib score"  
, OU2.shortname as "Request Lib", round(request_lib_score, 2) as "ReqLib score"  
, OU5.shortname as "Pickup Lib", round(pickup_lib_score, 2) as "PckLib score"  
, OU3.shortname as "Owning Lib", round(owning_lib_score, 2) as "OwnLib score"  
, OU4.shortname as "Item Circ Lib", round(circ_lib_score, 2) as "ItCirc score"  
, PG1.name as "User Group", round(user_grp_score, 2) as "UsGrp score"  
, PG2.name as "Requestors Group", round(requestor_grp_score, 2) as "ReqGrp score"  
, hmm.circ_modifier, round(circ_mod_score, 2) as "CrcMod score"  
, hmm.holdable, hmm.max_holds  
-- , hmm.ref_flag as "Ref", ref_flag_score, hmm.distance_is_from_owner, hmm.transit_range,  
hmm.include_frozen_holds, hmm.stop_blocked_user, hmm.strict_ou_match  
--from mymig.score_hold_matrix_matchpoints(11456702) as results  
from mymig.score_hold_matrix_matchpoints(160, 160, 4111441, 7994927, 7994927) as results  
left join config.hold_matrix_matchpoint as hmm on (results.matchpoint = hmm.id)  
left join actor.org_unit AS OU1 ON (hmm.user_home_ou = OU1.id)  
left join actor.org_unit AS OU2 ON (hmm.request_ou = OU2.id)  
left join actor.org_unit AS OU3 ON (hmm.item_owning_ou = OU3.id)  
left join actor.org_unit AS OU4 ON (hmm.item_circ_ou = OU4.id)  
left join actor.org_unit AS OU5 ON (hmm.pickup_ou = OU5.id)  
left join permission.grp_tree as PG1 on (hmm.usr_grp = PG1.id)  
left join permission.grp_tree as PG2 on (hmm.requestor_grp = PG2.id)
```

-- in the query above

from mymig.score_hold_matrix_matchpoints(11456702) as results

-- can also be written like

from mymig.score_hold_matrix_matchpoints(174, 174, 18370594, 1956041, 1920092) as results

-- with the format pickup_ou, request_ou, match_item bigint, match_user integer, match_requestor
integer

```

-----
-- Code for function
-- mymig.score_hold_matrix_matchpoints(x, x, x, x, x)
-- we have this in a custom schema mymig
-----

```

```

DECLARE

```

```

    requestor_object  actor.usr%ROWTYPE;
    user_object       actor.usr%ROWTYPE;
    item_object       asset.copy%ROWTYPE;
    item_cn_object    asset.call_number%ROWTYPE;
    my_item_age       INTERVAL;
    rec_descriptor    metabib.rec_descriptor%ROWTYPE;
    matchpoint        config.hold_matrix_matchpoint%ROWTYPE;
    weights           config.hold_matrix_weights%ROWTYPE;
    denominator       NUMERIC(6,2);
    v_pickup_ou       ALIAS FOR pickup_ou;
    v_request_ou      ALIAS FOR request_ou;

```

```

BEGIN

```

```

    SELECT INTO user_object      * FROM actor.usr          WHERE id = match_user;
    SELECT INTO requestor_object * FROM actor.usr          WHERE id = match_requestor;
    SELECT INTO item_object      * FROM asset.copy         WHERE id = match_item;
    SELECT INTO item_cn_object   * FROM asset.call_number  WHERE id =
item_object.call_number;
    SELECT INTO rec_descriptor   * FROM metabib.rec_descriptor WHERE record =
item_cn_object.record;

```

```

    SELECT INTO my_item_age age(coalesce(item_object.active_date, now()));

```

```

-- The item's owner should probably be the one determining if the item is holdable
-- How to decide that is debatable. Decided to default to the circ library (where the item lives)
-- This flag will allow for setting it to the owning library (where the call number "lives")
PERFORM * FROM config.internal_flag WHERE name = 'circ.holds.weight_owner_not_circ' AND
enabled;

```

```

-- Grab the closest set circ weight setting.
IF NOT FOUND THEN
    -- Default to circ library
    SELECT INTO weights hw.*
    FROM config.weight_assoc wa
        JOIN config.hold_matrix_weights hw ON (hw.id = wa.hold_weights)
        JOIN actor.org_unit_ancestors_distance( item_object.circ_lib ) d ON (wa.org_unit = d.id)
    WHERE active
    ORDER BY d.distance
    LIMIT 1;
ELSE
    -- Flag is set, use owning library
    SELECT INTO weights hw.*
    FROM config.weight_assoc wa
        JOIN config.hold_matrix_weights hw ON (hw.id = wa.hold_weights)
        JOIN actor.org_unit_ancestors_distance( item_cn_object.owning_lib ) d ON (wa.org_unit =
d.id)
    WHERE active

```

```

ORDER BY d.distance
LIMIT 1;
END IF;

-- No weights? Bad admin! Defaults to handle that anyway.
IF weights.id IS NULL THEN
  weights.user_home_ou := 5.0;
  weights.request_ou   := 5.0;
  weights.pickup_ou    := 5.0;
  weights.item_owning_ou := 5.0;
  weights.item_circ_ou  := 5.0;
  weights.usr_grp       := 7.0;
  weights.requestor_grp := 8.0;
  weights.circ_modifier := 4.0;
  weights.marc_type     := 3.0;
  weights.marc_form     := 2.0;
  weights.marc_bib_level := 1.0;
  weights.marc_vr_format := 1.0;
  weights.juvenile_flag := 4.0;
  weights.ref_flag      := 0.0;
  weights.item_age      := 0.0;
END IF;

-- Determine the max (expected) depth (+1) of the org tree and max depth of the permission tree
-- If you break your org tree with funky parenting this may be wrong
-- Note: This CTE is duplicated in the find_circ_matrix_matchpoint function, and it may be a good
idea to split it off to a function
-- We use one denominator for all tree-based checks for when permission groups and org units
have the same weighting
WITH all_distance(distance) AS (
  SELECT depth AS distance FROM actor.org_unit_type
  UNION
  SELECT distance AS distance FROM permission.grp_ancestors_distance((SELECT id
FROM permission.grp_tree WHERE parent IS NULL))
)
SELECT INTO denominator MAX(distance) + 1 FROM all_distance;

-- To ATTEMPT to make this work like it used to, make it reverse the user/requestor profile ids.
-- This may be better implemented as part of the upgrade script?
-- Set usr_grp = requestor_grp, requestor_grp = 1 or something when this flag is already set
-- Then remove this flag, of course.
PERFORM * FROM config.internal_flag WHERE name = 'circ.holds.usr_not_requestor' AND
enabled;

IF FOUND THEN
  -- Note: This, to me, is REALLY hacky. I put it in anyway.
  -- If you can't tell, this is a single call swap on two variables.
  SELECT INTO user_object.profile, requestor_object.profile
    requestor_object.profile, user_object.profile;
END IF;

-- Select the winning matchpoint into the matchpoint variable for returning
RETURN QUERY

```

```

SELECT *, a + b + c + d + e + f + g + h + i + j + k + l + m as total_score FROM (
  SELECT m.id,
  CASE WHEN rpgad.distance IS NOT NULL THEN 2^(2*weights.requestor_grp -
(rpgad.distance/denominator)) ELSE 0.0 END as a,
    CASE WHEN upgad.distance IS NOT NULL THEN 2^(2*weights.usr_grp -
(upgad.distance/denominator)) ELSE 0.0 END as b,
    -- Org Units
    CASE WHEN puoua.distance IS NOT NULL THEN 2^(2*weights.pickup_ou -
(puoua.distance/denominator)) ELSE 0.0 END as c,
    CASE WHEN rqoua.distance IS NOT NULL THEN 2^(2*weights.request_ou -
(rqoua.distance/denominator)) ELSE 0.0 END as d,
    CASE WHEN cnoua.distance IS NOT NULL THEN 2^(2*weights.item_owning_ou -
(cnoua.distance/denominator)) ELSE 0.0 END as e,
    CASE WHEN iooua.distance IS NOT NULL THEN 2^(2*weights.item_circ_ou -
(iooua.distance/denominator)) ELSE 0.0 END as f,
    CASE WHEN uhoua.distance IS NOT NULL THEN 2^(2*weights.user_home_ou -
(uhoua.distance/denominator)) ELSE 0.0 END as g,
    -- Static User Checks -- Note: 4^x is equiv to 2^(2*x)
    CASE WHEN m.juvenile_flag IS NOT NULL THEN 4^weights.juvenile_flag ELSE 0.0 END
as h,
    -- Static Item Checks
    CASE WHEN m.circ_modifier IS NOT NULL THEN 4^weights.circ_modifier ELSE 0.0 END
as i,
    CASE WHEN m.marc_type IS NOT NULL THEN 4^weights.marc_type ELSE 0.0 END as
j,
    CASE WHEN m.marc_form IS NOT NULL THEN 4^weights.marc_form ELSE 0.0 END
as k,
    CASE WHEN m.marc_vr_format IS NOT NULL THEN 4^weights.marc_vr_format ELSE 0.0
END as l,
    CASE WHEN m.ref_flag IS NOT NULL THEN 4^weights.ref_flag ELSE 0.0 END as m,
    -- Item age has a slight adjustment to weight based on value.
    -- This should ensure that a shorter age limit comes first when all else is equal.
    -- NOTE: This assumes that intervals will normally be in days.
    CASE WHEN m.item_age IS NOT NULL THEN 4^weights.item_age -
86400/EXTRACT(EPOCH FROM m.item_age) ELSE 0.0 END as n
  FROM config.hold_matrix_matchpoint m
/*LEFT*/ JOIN permission.grp_ancestors_distance( requestor_object.profile ) rpgad ON
m.requestor_grp = rpgad.id
  LEFT JOIN permission.grp_ancestors_distance( user_object.profile ) upgad ON m.usr_grp =
upgad.id
  LEFT JOIN actor.org_unit_ancestors_distance( v_pickup_ou ) puoua ON m.pickup_ou =
puoua.id
  LEFT JOIN actor.org_unit_ancestors_distance( v_request_ou ) rqoua ON m.request_ou =
rqoua.id
  LEFT JOIN actor.org_unit_ancestors_distance( item_cn_object.owning_lib ) cnoua ON
m.item_owning_ou = cnoua.id
  LEFT JOIN actor.org_unit_ancestors_distance( item_object.circ_lib ) iooua ON
m.item_circ_ou = iooua.id
  LEFT JOIN actor.org_unit_ancestors_distance( user_object.home_ou ) uhoua ON
m.user_home_ou = uhoua.id
  WHERE m.active
    -- Permission Groups

```

```

-- AND (m.requestor_grp      IS NULL OR upgad.id IS NOT NULL) -- Optional Requestor
Group?
  AND (m.usr_grp            IS NULL OR upgad.id IS NOT NULL)
  -- Org Units
  AND (m.pickup_ou         IS NULL OR (puoua.id IS NOT NULL AND (puoua.distance = 0
OR NOT m.strict_ou_match)))
  AND (m.request_ou        IS NULL OR (rqoua.id IS NOT NULL AND (rqoua.distance = 0 OR
NOT m.strict_ou_match)))
  AND (m.item_owning_ou     IS NULL OR (cnoua.id IS NOT NULL AND (cnoua.distance = 0
OR NOT m.strict_ou_match)))
  AND (m.item_circ_ou       IS NULL OR (iooua.id IS NOT NULL AND (iooua.distance = 0 OR
NOT m.strict_ou_match)))
  AND (m.user_home_ou      IS NULL OR (uhoua.id IS NOT NULL AND (uhoua.distance = 0
OR NOT m.strict_ou_match)))
  -- Static User Checks
  AND (m.juvenile_flag     IS NULL OR m.juvenile_flag = user_object.juvenile)
  -- Static Item Checks
  AND (m.circ_modifier     IS NULL OR m.circ_modifier = item_object.circ_modifier)
  AND (m.marc_type         IS NULL OR m.marc_type =
COALESCE(item_object.circ_as_type, rec_descriptor.item_type))
  AND (m.marc_form         IS NULL OR m.marc_form = rec_descriptor.item_form)
  AND (m.marc_bib_level    IS NULL OR m.marc_bib_level = rec_descriptor.bib_level)
  AND (m.marc_vr_format    IS NULL OR m.marc_vr_format = rec_descriptor.vr_format)
  AND (m.ref_flag         IS NULL OR m.ref_flag = item_object.ref)
  AND (m.item_age         IS NULL OR (my_item_age IS NOT NULL AND m.item_age >
my_item_age))) AS SCORES
  order by total_score desc, id;
END;

```